

TOURISM DEVELOPMENT PERSPECTIVE IN KOSOVO IN THE MARKET FRAMEWORK OF EUROPEAN TOURIST MARKET¹

Bekë Kuqi

University "Haxhi Zeka, Peć
beka.kuqi@gmail.com

Simona Martinoska

University "St. Kliment Ohridski", Bitola
Faculty of Tourism and Hospitality, Ohrid
simonabojadzi@yahoo.com

ABSTRACT

Tourism is one of the most important activities in a country's general economy and one of the main goals of each country's development, such as promoting the interests of its citizens, economic development and employment, regional development, cultural property management and natural and strengthening the identity of all citizens. Although facing more problems in different stages of development in the Republic of Kosovo, tourism development is already moving in the same direction as the overall development of the country's economy. The Republic of Kosovo has sufficient tourist potential, yet this potential has not been sufficiently exploited. Therefore, a national strategy is needed where the country will first need to identify, develop and implement a modern tourism concept to attract local and foreign tourists. Kosovo, placing itself in the center of the Balkan Peninsula as a tourist destination, is an important area that can be involved in the development of tourism in the region and Europe.

KEYWORDS: tourism, development, tourist destination, European tourism market.

¹Review paper

INTRODUCTION

Tourism is an economic activity that consists of several mutually coordinated activities to meet the needs of tourists and visitors. Today tourism is presented as an industry because it is a sector that seeks to utilize natural resources, human and financial capital for the creation of tourism products and services and it should be noted that such exploitation or development should be done according to the principles of sustainable development. The tourism industry is an important sector that has contributed to the growth of the economic activity of many countries in the world. Tourism is an economic and international activity involving economic, political, social and environmental factors, which have their complex nature and, in some cases, conflicting relationships. Today tourism is characterized by a continuous and rapid development and with great sensibility. Facing insecure internal and external factors, tourism draws attention worldwide, often in terms of finding and choosing strategies and plans that will adapt to the latest geopolitical, social, economic, technological and environmental changes. Tourism has great potential and plays an important role in meeting key macroeconomic objectives related to economic growth, employment, sustainable economic and social development. In this sense, tourism impacts may have economic, social, natural or environmental, political and cultural characteristics. Of all the mentioned categories of tourism impacts, economic impact is of great importance for overall development. Tourist aspects have social and economic characteristics and the importance of tourism from the aspect of social character is perceived in the impact on the preservation of psychophysical skills and health of the population, then in maintaining the level of culture, care for the protection and preservation of cultural heritage values and links which exist between the different countries and regions of the world. and the services for tourists and all helps to complete or complete the fulfillment and fulfillment of tourist needs.

The research and study of the phenomenon called tourism from the point of view of the system contains four main elements (Vjollca Bakiu, Tourism Management, Tirana, 2009, page.18).

1. Tourists (individuals or groups),
2. Tour Operators and Intermediaries,
3. Tourist offer,

4. The social aspect (changes in society, culture, technology and politics related to tourism movements).

Kosovo's regional relationship with neighboring countries

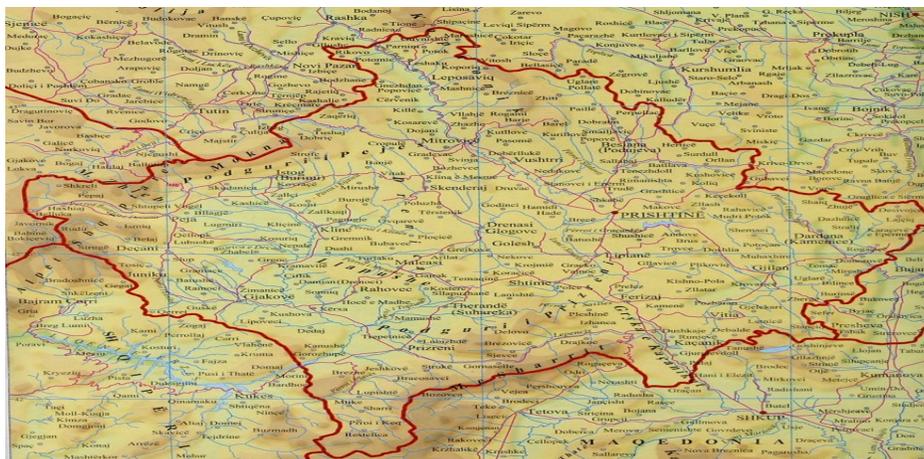
Kosovo's regional roads are about 1110 km in length, in fact these roads have north-south (190 km north to south) and east-west (150 km east-west of this country). The entire territory of Kosovo has a road network of 8552 km, a 330 km long railway network across the country with its headquarters in Pristina and an international airport in Pristina (Rashica E., Road Infrastructure of Kosovo, Pristina 2016, page.4) Within the municipalities there are 6571 km of roads, of which 571 km are urban roads and approximately 6000 km are local roads. Most national and regional roads are two-lane, however they are the international standards for road construction. Kosovo road infrastructure consists of:

1. International roads (highways),
2. National roads (national roads)
3. Regional roads,
4. Local roads (urban and rural roads).

Local links of tourist resorts in Kosovo

Today, the territory of Kosovo is divided into 38 municipalities and each municipality is responsible for the maintenance and development of road infrastructure. It should be noted here that the conditions on local roads can not be compared to those on regional and highway roads. Local roads built in the past today do not meet the basic standards.

Photo nr. 1, Road Infrastructure in Kosovo



Burimi: Rashica E., Road Infrastructure of Kosovo, Pristina 2016

As a result of ongoing investments and programming of new road construction from 1999 until today, it can be said that 88% of main roads and 74% of regional roads have good qualities that meet the most important needs for freight transport and passengers. According to the latest data, 33% of local roads on the country level require rehabilitation, while 97% of all unpaved roads need urgent intervention. Kosovo does not have a relatively good road infrastructure if it is seen from the aspect of space and involvement of the entire territory of the country, as well as from the aspect of the road network conditions, traffic safety and the requirements for the construction of new roads, may say is not at the right level and does not meet international standards.

When it comes to the connection of tourist resorts in Kosovo, it can be said that there are obvious shortcomings in terms of roads or infrastructure and as an example these can be taken:

- from Vushtria to Klina (regional road R 105), well-known tourist sites are 49 km away, but only 30 km is an asphalt road,

- the road leading to Decani through Junik (regional road R 109) in many popular tourist resorts, at length of 17.6 km, only 6.3 km are asphalted and 11.3 km are asphalt road,
- Teranda-Brezovica road (regional road R 118), a winter winter center, with a length of 26.8 km, has only 13.2 km of asphalt road and 13.6 km from the road is unpaved.

The only airport in Kosovo is Adem Jashari International Airport in Pristina. It is now managed by the consortium "Limak and Aeroports de Lyon". This consortium took over the management of the aerodrome in August 2010, following the signing of the Public Private Partnership Agreement. From that date, to date, a new 42,000-square-meter terminal has been built, which is connected to other buildings and uses the latest technology for this type of service. This consortium has an agreement to operate the airport in Pristina for a period of 20 years, when all assets, equipment and management technology will be transferred from the Government of the Republic of Kosovo.

THE BASIC DIVISION OF FACTORS FOR TOURISM DEVELOPMENT

Tourism as an activity arises when a country realizes a significant development in the economy and society. Tourism occurs when people create the conditions to travel outside their home country and stay temporarily elsewhere for holidays, recreation, visiting friends and other tourist reasons.

Today, tourism is a very important sector in the economy that generates financial resources and creates new jobs. Although it is an important part of the overall economy, for tourism in Kosovo, there is still no talk of good development. Kosovo inherited a low level of economic development due to established economic measures and the recent war, coupled with the slow privatization process, small foreign investment and the like. Of course, tourism moves within negative economic and political processes.

Factors tourist demand

Tourist demand factors or demand-inducing factors are factors that influence the creation of conditions for tourist needs and appear in the permanent residence of

potential tourists and strongly influence the flows of tourists. If viewed from a market perspective, these factors create demand for tourism.

Tourism demand factors are divided into (Initiative for the Development of Agriculture in Kosovo (IADK), Tourism Development Factors, Trainings and tourist services in rural tourism, Pristina, 2017, f.1 (<http://www.iadk.org>)).

- Objective factors and
- Subjective factors

Objective factors

Objective tourism factors require influence regardless of the behavior of individuals. These factors create the tourist movement without being influenced by the desires of particular groups of people. As the most influential objective factors of tourist demand are considered (Initiative for the development of agriculture in Kosovo (IADK), Tourism Development Factors, Trainings and tourist services in rural tourism, Pristina, 2017, f.1 (<http://www.iadk.org>)).

- Medical condition,
- The standard of living,
- Free time
- The environment in which tourists work and operate.

In addition to the stated factors, other factors such as the country's political situation, the role of the country in undertaking measures for the development of tourism, etc., are influenced by the creation of tourist demand.

Subjective factors

The subjective factors of demand are an expression of individual tourists' opportunities to travel and stay in one place. These factors are related to human behavior and have a psychological character. Specifying these factors is that they appear and act only when the objective factors of demand are created. Often, when people have free time and money they can not use for tourist purposes. The group of subjective factors includes these.

- Tradition,
- The level of culture and education of the population,
- Fashion,

- The behavior,
- Prestige and the like.

In addition to the factors listed, there are other subjective factors, such as peoples' religious feelings, political instability, the appearance of criminality, epidemics, natural phenomena and the like.

Factors of tourist offer

Because touristic offers and tourist demand are on both sides of the tourism market, these forces work towards creating an equilibrium in that market. Tourist offer factors act as they attract as many tourists to those countries and regions that are interesting to them.

These factors directly create travel conditions and are divided into two main groups:

- Attractive factors,
- Receiving factors

Attractive factors

Attractive factors are the factors upon which the quality of a country or tourist destination depends most. They are an expression of the geographical environment and actions of people who are recognized in tourist literature as tourist motives or tourist sources. The resort term refers to attractive activities and natural beauties that can stimulate tourism movements and meet the demands and needs of leisure, recreation and entertainment in entertaining destinations. The ability of these factors to attract tourists and to meet their needs derives from the attributes or features of these factors, and these characteristics or specifications are as follows:

- Entertainment,
- Special issues,
- Aesthetics.
-

Reception Factors

Tourist offer host factors refer to the system and the provision of conditions for stay and rest. This group includes:

- catering facilities,
- Communal facilities and transportation,
- Tourism organizations,
- Special services,
- Parks and promenades

Tourist mediation factors

The third group of factors influencing the development of tourism are the factors of tourism mediation. They act as incentive factors both on the supply side and on the demand side, and at the same time link the two previous groups of factors, because their role is mediation.

The act of mediating factors has more functional value and this group includes

- Tourist agencies and tour operators,
- Tourist transportation,
- Tourism policy,
- Promotion of tourism.

Factors for tourism development in kosovo as a tourist destination

In most countries, the tourism sector is a very important sector for the country's economic development. The development of tourism not only contributes to the overall development of the country but also represents the country's natural culture and beauty in the world. To better understand the factors for a country's tourism development, it is very important to take into account some important economic and tourist indicators and in the follow-up of this text we will try to show the most important indicators of Kosovo's economy and tourism:

Table 2, General Indicators for Kosovo(Statistical Agency of the Republic of Kosovo, Economic Statistics,Pristina, 2017, page.4-5 (the data is for the year 2016).

The ordinal number	Tregues	-Value
1.	Area	10.906 km ²
2.	Residents	1469
3.	Municipalities	38
4.	Population	1.739.825
5.	GDP	5.984.900.000 €
6.	Income per capita	3.440 €

Source: Annual Report of the Kosovo Agency of Statistics - ASC 2017
Table 3, Indicators of Economic Activities

The ordinal number	Indicator / Year	2010	2011	2012	2013	2014
1.	Registered Enterprises	41.063	41.425	41.757	29.057	31.921
	Group Index	100	100,9	101,7	70,7	77,7
	Chain index	/	100,9	100,8	69,6	109,9
2.	number of employees	115.107	123.218	145.433	149.886	145.736
	Group Index	100	107,0	126,3	130,2	126,6
	Chain index	/	107,0	118,0	103,1	97,2
3.	Tourist enterprises	3.364	3.459	3.715	3.126	3.360
	Group Index	100	102,8	110,4	92,9	99,9
	Chain index	/	102,8	107,4	84,1	107,5
4.	Number of employees in tourism	7.432	6.356	7.389	11.174	10.488
	Group Index	100	85,5	99,4	150,3	141,2
	Chain index	/	85,5	116,3	151,2	93,8

Source: Kosovo Agency of Statistics, Number of active enterprises by economic sectors, Prishtina, 2017

On the other hand, in Kosovo, according to data from the Kosovo Agency of Statistics, in 2010 were registered 41,063 enterprises, employing 115,107 employees, out of which 3,364 were in the tourism and hotel sector where 7,432 employees were employed. In 2011, 41,425 enterprises were registered, employing 123,218 workers, out of which 3,459 enterprises in the tourism and hotel sector, employing 6,356 employees. In 2012, 41,757 enterprises were registered, employing a total of 145,433 employees, and in that year there were 3,715 enterprises employing 7,389 employees in the tourism and hotel sector.

In 2013 there was a significant decrease in the number of enterprises, so 29,057 enterprises registered 149,886 employees in that year, while in tourism and catering there were 3,126 enterprises with significant increase in the number of employees (11,174 employees). In 2014, a total of 31,921 enterprises were registered in Kosovo, employing a total of 145,736 employees, while in the tourism and hotel sector there were 3,360 enterprises with a total of 10,488 employees. In this section, it should be noted that the data from the Kosovo Agency of Statistics relate to the years 2008 to 2014, so we are unable to present the latest data. According to this agency, in 2012 tourism amounted to 39.1 million euros GDP in 2013 was 49.8 million euros, in 2014 with 52.1 million euros and in 2015 with 60.1 million euros. It has been noted that the tourism part of Kosovo's GDP is growing annually and in 2016 tourism has participated with EUR 67.5 million or 1.1% of GDP in Kosovo

Natural resources as a factor for the development of tourism in Kosovo

Natural tourism factors are naturally created and describe the geographic environment of a country. Natural beauties, climatic conditions, thermomineral waters, caves, geomorphological forms, flora and fauna are the first "tourism materials" that are the basis for tourism development in one place. Location, topography are other factors considered as carriers of natural resources consisting of water resources, waterfalls and shallow and deep gorges. In Kosovo there are relatively good conditions for the development of many types of tourism, because there are natural treasures in the country and the advantage is special geomorphological forms, hydrography and climate and other attractive elements that make Kosovo one of the most attractive destinations in this region. Of particular interest are winter, health sports, hunting and transit

tourism, as according to some surveys in Kosovo there are potential for building 20 winter centers that provide excellent conditions for winter tourism development according to international standards.

Climate as a factor for tourism development

Climate is one of the most important factors for tourism development in Kosovo. In most of the country, the climate is continental, resulting in warm summers and cold winters but with a small Mediterranean influence and Alpine climate (in summer the temperature reaches +30 degrees Celsius and in winter at -10 degrees Celsius).

However, it should be noted that due to unequal levels in certain parts of the country there are also differences in temperature and precipitation distribution. December and January are the coolest months, and July and August are warmer months. The maximum rainfall precipitation occurs in October to December, and between November and March there are snow, mainly in the mountainous regions of the country. The valley located between Mitrovica and Kacanik belongs to the worst of the drought in Kosovo. Rather, the valley between Dukagjini, Prizren and Peja is considered the most fertile land in Kosovo, with the highest rainfall in November and March.

Based on climatic conditions, Kosovo is divided into three climatic zones:

1. Climate zone of Kosovo
2. Climate zone of Dukagjini
3. Climate zone Mountains

The world's most important tourist trends in the UNWTO

The growth and development of the tourist activity has turned tourism into one of the most prominent economic and social phenomena of the past and the next century. Number of international trips (UNWTO, Tourism Highlights, 2016 Edition, page.2 (for more information, see the following page: www.e-unwto.org/doi/book/10.18111/9789284418145)), shows an evolution in such a move, which is from 25 million tourists traveling in the late 1950's, 278 million

tourists in 1980, 674 million tourists in 2000 and this number reaches the incredible for the first time in the history of tourism , about 1.2 billion tourists in 2015. It is assumed that the number of tourists in 2030 will reach 1.8 billion.

According to the data from the map, it can be noticed that the most visited region of the world by tourists is Europe with 608 million tourists or with a total participation in the number of tourists by 51.2%. The second is Asia and the Pacific with 279 million newcomers or a total of 23.5% of the tourism market. Following this paper, we will present international tourist movements by regions and sub-regions worldwide, and in particular, in the table below, we will present international achievements in a global number. According to the data in the table, it can be noticed that the number of international tourists managed to grow steadily, so in 2010 around 951 million tourists traveled around the world, while in 2011 995 million tourists traveled. Already in 2012, for the first time, the number of international tourists exceeded the limit of 1 billion tourists (World Tourism Organization (2017), UNWTO Annual Report 2016, UNWTO, Madrid, page.13).

Table 4, International Tourism Movements for the period 2010-2016 (World Tourism Organization (UNWTO), Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) of the European Commission (EC), European Union Short-Term Tourism Trends for 2016, a Report on the Trends Regarding International Tourist Arrivals (overnight visitors) in the 28 Member States of the European Union (EU-28) in 2016, Volume 1, 2017-1, page.6)

	The arrival of international tourists (in millions)							Market Participation in% for 2016	Difference 2016/2015 in%
	2010	2011	2012	2013	2014	2015	2016		
Country	951	995	1042	1090	1137	1189	1235	100,0	+3,9
	489,4	520,6	541,1	567,1	580,2	607,5	619,7	50,2	+2,0
Europe	205,5	218,3	233,8	249,9	264,4	279,3	302,9	24,5	+8,4
Asia and the Pacific	150,1	155,7	162,6	167,6	181,9	192,7	200,9	16,3	+4,3
America	50,4	50,1	52,3	54,7	55,2	53,8	58,2	4,7	+8,1
Africa	55,4	50,3	51,9	51,1	55,4	55,9	53,6	4,3	-4,1

In 2013, this number reached 1.090 billion tourists and in 2014 it reached up to 1.137 billion tourists. This number grew in 2015 to reach nearly 1.2 billion tourists. In 2016, around 1.235 billion tourists traveled around the world. In the world, the difference between 2016 and 2015 in percent is + 3.9%.

Table no. 5, Income from international tourism

The row	Country	In billions of dollars		2015/2014 (%)
		2014	2015	
1.	USA	191.3	204.5	6.9
2.	China	105.4	114.1	9.8
3.	Spain	65.1	56.5	4.0
4.	France	58.1	45.9	-5.4
5.	Great Britain	46.5	45.5	5.2
6.	Thailand	38.4	44.6	22.0
7.	Italy	45.5	39.4	3.8
8.	Germany	43.3	36.9	1.9
9.	Hong Kong	38.4	36.2	-5.8
10.	Makao	42.6	31.3	-26.5
	Total:	674.6	654.9	1.45

Source: World Tourism Organization - UNWTO 2016

Of the top ten countries with the highest income from tourism, five countries belong to Europe as a world tourist region. However, it is apparent that the total income for these countries decreased in 2015 compared to 2014 and the largest drop in tourism revenue was recorded in Macau as a tourist destination (-26.5%). On the other hand, as China's largest tourism market for 2015, China's tourists spent more than \$ 292 billion in second place, followed by US tourists with \$ 113 billion and Germans with \$ 77.5 billion.

Conclusions

The success of Kosovo's tourism in the future depends on the ability to predict and capitalize on change. If we go from transition to globalization, then tourism must take into account all the factors that affect success but at the same time the

survival of all tourist entities. These factors depend on the organization of tourism, which can be leadership, globalization, diversification, flexibility, structure, customer focus and information. Tourism should be able to respond to all issues pertaining to global services, sales trends and property of tourism entities, as well as increased levels of job demand. This structure should use regional and global innovation sources, for consumers, and for all types of revenue from this activity. Tourism is one of the main reasons for the growth and development of the economy at the local and national level. All transition countries, like Kosovo, pay much attention to tourism, taking into account all the climatic conditions and natural beauties that can be used for tourism development. Tourism and hospitality are defined as transposable business areas and what can be foreseen in the future is the further increase of the level of interest in these phenomena by society, private businesses, associations, social institutions, even more because of the impacts of economic, social, psychological and recreational strengths that tourism and hospitality bring.

Based on the research in this paper, we come to the following conclusions:

- The geographic position of Kosovo has a major impact on the creation of a positive tourism position of the country as a tourist destination within the Balkans and Europe (Kosovo is at the center of many important regions such as Panonia in the north, the Black Sea in the east, the Aegean Sea South and Adriatic Sea to the west),
- The position of Kosovo from the aspect of space and geopolitics can be used to create a new tourist offer and to participate in a common tourism market covering a wide area where the greatest benefits will be achieved by the movement of people, goods, services and capital,
- Kosovo's connection with neighboring countries and Europe is not at the right level because the road network and infrastructure are not so developed (roads are built fifty years ago and are not maintained), rail transport is developed only in the short term within the country, there is only one international airport, international highways are not built according to international standards, is building some national roads that will link Kosovo with Macedonia and Albania,
- During the period from 1970 to the beginning of 1990, tourism in Kosovo faced major problems (restrictive measures for hotel companies, a large number of workers from this sector were out of work, bigger

legal measures were introduced in the area of social capital, discontinued start-ups)

- During this period the tourist turnover decreased, the capacities for tourist accommodation reduced, the number of domestic and foreign tourists decreased, and the number of nights of staying by domestic and foreign guests,
- In the period 1998-1999, tourism potentials and capacities, ie assets created over the years, have been largely destroyed in Kosovo and this has led to the destruction of the country's economy,
- After the end of the Kosovo military conflict, tourism began to occupy an important place in the economy and according to survey data we can conclude that tourism in the country's GDP is over 1% (almost 6 billion euros in 2016), while per capita income in that year was 3440 euros,
- Today there are 3360 tourist companies in Kosovo, employing almost 10,500 employees, respectively 10.5% of the total number of enterprises in the field of tourism and 7.2% of the total number of employees at the country level are in this sector,
- There are relatively good conditions for tourism development in Kosovo because this country has a great natural wealth (geomorphologic form, hydrography and climate and other attractive elements) whose use makes Kosovo one of the most attractive destinations in the region and Europe
- Sports, health, hunting and transit tourism can be developed in Kosovo because it has the potential to build more centers that can offer excellent conditions for the development of these types of tourism according to European or international standards,
- Major tourist attractions are also considered as Mirusha waterfalls, Nerodim River, Peja Baths thermal waters, Klokot Baths and Mitrovica Baths, as the thermal power of these thermal waters can be compared to the famous baths in the region. However, at present there are not enough accommodation facilities for the admission and stay of tourists in these countries,
- Kosovo as a tourist destination in Europe is also known for its anthropogenic values as an integral part of the tourist offer, which can be used to extend the duration of the tourists' stay and increase the income on the basis of cultural tourism (visit cultural and historical monuments, museums, galleries, sporting events and festivals),

- Kosovo as a tourist destination is known for its traditional cuisine as one of the most representative kitchens in the Balkans, with certain influences from neighboring countries but also from the Mediterranean elements of food preparation, so we believe that Kosovo's cuisine should be strongly promoted and an integral part of each package tour agreement,
- Financial factors for the development of tourism are not at the right level, because both state organizations and private entities do not invest enough in this regard and on the other hand there are major problems in providing favorable loans for subsidizing tourism entities in general,
- In Kosovo there is a shortage of professional staff in the field of tourism and hotels, hotel managers do not have a sufficient level of education and the staff is composed of young and unskilled persons who have no access to education and further training ,
- Only a few high schools have tourism and catering facilities and only three higher education institutions (two colleges and one public university) offer study programs on tourism,
- According to Kosovo's statistical division, the country's statistical agency points out that in Kosovo, in seven statistical regions, there are 109 hotels that are categorized by law, 2512 rooms with 3770 beds. However, the total number of hotels is 194, and along with other types of accommodation facilities, the number of accommodation facilities is 495 entities, which have about 7,000 rooms with nearly 11,000 beds. We consider that the number of hotels, rooms and beds is not enough to welcome and accommodate a greater number of domestic and foreign tourists,

REFERENCES

- Musa. Gashi, The basics of tourism, Pristina, 1988,
- Puskule A., Integrated qualitative marketing management in coastal, urban and rural tourism destinations, Doctoral thesis, Faculty of Tourism and Hospitality-Ohrid, Ohrid,2015,
- Rashica E., Road Infrastructure of Kosovo, Pristina 2016,
- Reçica F., Millaku B., Tourism Economy, Pristina, 2011,
- Richards, G., Cultural Tourism in Europe, Atlas, 2005,

- Sogojeva H., Mirushe waterfalls and their influence in the development of tourism in Kosovo, Doctoral dissertation, Faculty of Tourism and Hospitality, Ohrid, 2017 year,
- Vjollca Bakiu, Tourism management, Tirana, 2009
- Agency for Statistics of the Republic of Kosovo, Tourist capacities (accommodation units) in Kosovo for 2016, Capacity Report, Pristina, July 2017,
- Statistics on the Republic of Kosovo, Series 3, Economic Statistics, Hotel Statistics, Q4-2016, Pristina, March 2017,
- Agency of Statistics of the Republic of Kosovo, Catering Facilities for Accommodation and Food, Prishtina, 2016.
- World Tourism Organization (2017), UNWTO Annual Report 2016, UNWTO, Madrid,
- World Tourism Organization (UNWTO), Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) of the European Commission (EC), European Union Short-Term Tourism Trends for 2016, a Report on the Trends Regarding International Tourist Arrivals (overnight visitors) in the 28 Member States of the European Union (EU-28) in 2016, Volume 1, 2017-1, p.6