

The tourist regions in Kosovo and the analysis of competition

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Abstract

Tourism is one of the most important activities in Kosovo. The development of tourism can make direct and indirect impacts on the economy of a country. The direct impact is associated with the social product, increase in the national incomes, development of economic activities that are linked with tourism (catering, transport, trade, development of cultural heritage, increase in the employment, increase in the investments, payment balance etc.).

Meanwhile, the indirect impact is associated with activities which provide services and products to the citizens, such as: agriculture, construction sector, industry, artisanship etc. The participation of tourism in the creation of GDP in Kosovo is about 7 % , while it is expected that this participation will be about 12 % by 2020. Kosovo is fairly rich in tourist resources (natural and cultural), such as: mountains, rivers, lakes, gorges and canyons, caves, thermal and mineral resources. It has a good geographical position and cultural, historic and religious heritage (towers, monasteries, mosques) etc.

The competitive position of Kosovo in the region isn't still strong enough despite strengths and opportunities for development. It is extremely necessary to develop public-private funding in the field of tourism and attract direct foreign investments.

Keywords: Kosovo, tourism, regions, tourist offer, tourist request, competition.

Introduction

Tourism is one of the most complex activities of modern society. In the developed countries, it has taken the form of an industry which is interrelated and connected with economy, politics, culture and all other activities. The development of tourism can make direct and indirect impacts on the development of a country. Amongst the most important direct impacts of tourism in economy are: the impact on social product, increase in the national incomes, development of economic activities that constitute tourism offer (catering, transport, trade, cultural institutions etc.), increase in the employment, increase in the investments, increase in the improvement of payment balances etc.).

Tourism makes indirect impact on those economic activities which do not provide direct services to the citizens but they supply tourist economy. These impacts can be noticed in economic activities, such as: agriculture, construction sector, industry, artisanship etc. Tourism includes the activities of persons who travel and accommodate themselves in a country that is out of their permanent residence for vacation purposes, business and other purposes but not for a longer period than one year.¹

Regarding the framework of definition of tourism, the reasons for travelling can be identified as:

¹ The tourism development strategy in Kosovo 2007-2013, Ministry of Trade and Industry (MTI), 7.

- Business travels, conferences, exhibitions, different meetings etc;
- The relaxing holidays in the sunny areas and sea, holidays in the mountains, cities, walks, sailings on the river etc;
- Tourist events with cultural content, such as: artistic festivals, folk festivals, classic music festivals, pop music concerts, sports events, traditional anniversaries etc;
- The tourism for curative purposes on the sea and places with thermal mineral resources;
- Visits paid to friends and relatives;
- Pilgrimages etc.

The tourism sector is an important sector for the economic development within the global economy, too. The competitive tourist product doesn't have to do only with the spatial spread and reception of visitors but it makes also an impact on the increase of incomes and decrease in the unemployment of a specific tourist environment, which results in the improvement of the quality of living. In addition to benefits for the local population, the country also benefits from the development of tourism industry. Another beneficiary from the developed tourism is the tourist business community itself. The development of tourism includes these kinds of travels: holiday travels (for longer than 5 days), walks in the cities, different cultural and sport events and travels for curative purposes etc., pilgrimages, visits paid to friends and relatives, travels for business purposes (individual), conferences, fairs, sessions and tribunals.²

The tourist regions of Kosovo

Kosovo is divided into five tourist regions: the central region of Pristina, the tourist region of Albanian Alps (the Accursed Mountains), the tourist region of Sharri, the tourist region of Anamorava and the tourist region of Mitrovica.

The central tourist region of Pristina

The central tourist region of Pristina is the epicentre of all tourist sites of Kosovo (Pristina, Besiana, Drenas, Lypjan, Kastriot and Fushë Kosovo). Even though tourism in these areas doesn't present an accentuated direction of development, it is appreciated the important development of transit and business tourism, the richness of important monuments of cultural-historic heritage and provision of the best level tourist services in Kosovo. The priority types of tourist activity in the region of Pristina are: business tourism, congressional tourism, cultural tourism, transit tourism and summer tourism.

Another tourist place to visit in this region is the village of Janjevo. It is a multi-ethnic town (with Albanian, Croatian, Turkish and RAE community inhabitants). There is an imposing Catholic church and Muslim mosque and the birthplace of folklorist and poet Shtefan Gjecovi (best known as the collector of the oral tradition of the 'Kanun of Leke Dukagjini' traditional Albanian law), and Kosovo's first post office.³

² The tourism development strategy in Kosovo 2011-2020, Ministry of Trade and Industry (MTI), 9.

³ Grooving. The beautiful village of Janjevo. http://www.elizabethgowling.com/pb/wp_08ba1fb6/wp_08ba1fb6.html.

The tourist region of Albanian Alps

The tourist region of Albanian Alps is a capital area for the development of tourism (municipalities of Peja, Deçan, Burim, Klina, Gjakova and Rahovec). According to natural specifications and features of relief, biogeographical variety of extremely rich water resources, richness of landscapes and environment features, Albanian Alps, undoubtedly, constitute the most unique mountain massif in the region. Albanian Alps present the culminant values as regards:

- richness, frequency, variety and geomorphological peculiarities of objects (mountains, gorges, canyons, caves etc and their attractive features);
- Morphological conditions for the development of winter sports, alpinism and speleotourism;
- Denivelation and potencial capacities of ski paths (65.396 m and the respective number of skiers for an hour), with other areas and conditions for the development of winter-sports tourism.

As distinguished sites with, especially, impressive geomorphological phenomena that contain visible aesthetic attributes that arise curiosity are: the Rugova gorge, the spring of Drini i Bardhë (White Drin), the Mirusha Waterfall, the Radavci Cave, Peja Spa and rocky crests. The area of Albanian Alps presents a special tourist value but it is also a factor for the assessment of the entire tourist nature of the Albanian Alps. All these priorities enable and stimulate the development of the following types of tourism: mountainous tourism, tourism for curative purposes, cultural tourism, sports and recreational tourism, country tourism, ecotourism, transit tourism, congressional tourism, winter tourism etc.

The tourist region of Sharri

The tourist region of Sharri includes the mountain massif as the most distinguished and wide entirety of this part of Kosovo which includes the following municipalities: Prizren, Ferizaj, Shtërpce, Dragash, Kaçanik and Theranda. The tourist region of Sharri, along with Albanian Alps, is the most attractive region of Kosovo where can be found highly preserved natural areas and the accompanying infrastructure. In this zone can be found the fields and canyons of Drini i Bardhë (White Drin), Prizreni's Lumëbardh (Bistrica), Lepenc and their branches, cities like Prizren and Ferizaj as well as communication corridors with respective equipment and accompanying services. The tourist region of Sharri is not monocentric because, except Prizren as the most attractive tourist city, there is also Ferizaj (with suitable communication position), then Sharri (Dragash), Theranda and Kaçanik. Because of the suitable position, all abovementioned places present the initial points that will enable us the use of stationary tourist capacities and other planned destinations. The region of Sharri (from Luboten on the north-east up to Brod on the south-west) is divided into three main zones: the zone of Luboten and Brezovica, the middle zone along Prizren-Tetova road and the zone of Brodi. The priority types of tourism in the region of Sharri are: mountainous tourism, winter-sports tourism, rural tourism, hunting and fishing, activities in nature, alpinism etc.

The tourist region of Anamorava

The tourist region of Anamorava includes these municipalities: Gjilan, Vitia, Dardana and Artana.

Gjilan is the main city of this tourist region. The most important places in the municipality of Gjilan for the development of tourism are: Karadaku's mountains, Zhegoci's mountains, the resources of thermal waters in Pogradjë, Dobërçan, objects of cultural-historic heritage etc. In Viti is also situated the rehabilitation center Klokoti Spa, a part of Karadaku's mountains, but there are also cultural heritage monuments in Letnicë, Stubëll which are significant for the development of cultural tourism etc. In Dardana, the most important places for the development of tourism are: Kika, a suitable place to build a grass skiing tourist center, while Gmiza and Lisocka are suitable places for recreational-sports tourism. These places have been declared by the Assembly of Dardana as the places of special importance. Meanwhile, Artana is amongst the oldest centers in Kosovo. In Artana also can be found Artana's Castle which is an object that can be visited frequently by the tourists in the future etc. The priority types of tourist products in the region of Anamorava are: medical tourism, transit tourism, rural tourism, cultural tourism, hunting, fishing etc.⁴

The tourist region of Mitrovica

There are qualitative potentials in the tourist region of Mitrovica, (municipalities: Mitrovica, Zubin-Potok, Leposaviq, Skënderaj and Vushtrri) but they are not on the same level with potentials of Sharri and Albanian Alps.

Mitrovica is the main city in this tourist region. The Municipality of Mitrovica is rich in monuments of cultural-historic heritage. Shala e Bajgorës is also a suitable place for the development of several kinds of tourism in the future. Skënderaj is a town that belongs to this tourist region which is rich in monuments of cultural-historic heritage and there can be developed rural and recreational tourism, i.e. Qyqavica. The town of Vushtrri is amongst the oldest centers of Kosovo where do exist potentials for the development of cultural, transit and recreational tourism. The more suitable places for the development of these kinds of tourism are: Qyqavica, Shala e Bajgorës and some very old monuments of cultural-historic heritage, such as: the Stone Bridge, the Hammam, the Castle etc. The priority types of tourist products in the region of Mitrovica are: mountainous tourism, rural tourism, tourism for curative purposes, cultural tourism, transit tourism, hunting, fishing etc.⁵

The structure of the tourist offer

Three different levels can be distinguished in the hierarchy of the tourist offer of Kosovo, looking from the tourism offer creation aspect.

The first level – the tourist offer of Kosovo, that includes a higher level of tourist offer on local, regional, national and international level, is based on rare natural beauties, such as: mountain massif landscapes of Albanian Alps, then the heights of peaks that reach 2600 m, suitable climate conditions for the development of summer and especially winter tourism as well as the network of cities and settlements that organize and offer services.

⁴ Grooving. The beautiful village of Janjevo. http://www.elizabethgowling.com/pb/wp_08ba1fb6/wp_08ba1fb6.html.

⁵ Grooving. The beautiful village of Janjevo. http://www.elizabethgowling.com/pb/wp_08ba1fb6/wp_08ba1fb6.html.

The second level – the tourist offer of tourist significance: mountain massifs of Kopaonik and Mokra Gora, as very qualitative areas for tourism during the whole year, are of secondary importance because in the same region lie Albanian Alps and Sharri, then the thermal centers such as Spa-s (Peja Spa), Klllokot (near Gjlani) and Banjska (near Mitrovica), very beautiful natural attractions, such as the Mirusha canyon and waterfalls, the Rugova canyon, the spring of Drini i Bardhë (White Drin), bifurcation of Nerodime, the Marble Cave in Gadime, the Cave of Radavc, Petreshtica, Panorc, Bresalc, the Rugova gorge etc.

The third level – is the tourist offer that includes the daily and weekend excursions to the urban centers, based on existing natural elements, for recreational and entertainment purposes.⁶

The analysis of competition

The analysis of competition, presented below, compares the position of Kosovo as a tourist destination with the neighboring countries and some countries of the region. The classification shows strengths and weaknesses of competitors compared with Kosovo.

Tab. 1. The analysis of competition

Competitive criteria	Albania	Bosnia & H.	Croatia	Macedonia	Montenegro	Serbia	Kosovo
Image	-/+	-/+	+++	-/+	+	-/+	-
The possibility of entering from the original markets	++	++	+++	++	++	+	++
Products:							
Sun&Beach	+	-	+++	-	++	-	-
Cultural tourism	+	+	++	-	+	+	-
Winter tourism, skiing etc.	-/+	-/+	-	+	+	-/+	+

⁶ Nationaal Geographic, Kosovo Facts, <http://travel.nationalgeographic.com/travel/countries.kosovo-facts/>.

Natural, rural, adventurous tourism etc.	+	-/+	++	-/+	+	-/+	-/+
Other (Danube, Ohrid's Lake etc.)	-/+	-	+	+	+	+	-
Included in the program of operators that organize excursions (important)	+	-	+++	+	+++	+	-
The quality of products	-	-	+++	-	+	-	-
Categorization, quality assurance	-	-/+	+++	-	+	-/+	-
The level of prices / value for money	-	-/+	+	-/+	-/+	-	-/+
Institutional system&support	-/+	+	+++	-/+	++	+	-/+
Marketing efforts	+	+	+++	-/+	++	+	-/+
PR efforts, media presence	-/+	-/+	+++	-	+	-/+	-
Investments in tourism sector	+	-	+++	-	+	+	-/+

Source: The tourism development strategy in Kosovo 2007-2013, MTI, Pristina 2006
 Kosovo Tourism Center.Exploring Kosovo,Wine and Food, <http://kosovo tourism center.com/food.html>

+++ = *very developed*, ++ = *developed*, + = *good*, -/+ = *satisfactory*, - = *insufficient, poor, bad*.

The presented data reflect comparisons between Kosovo and the neighboring and regional countries and it can be seen clearly that Kosovo is not currently competitive in the tourist market with the countries in the region. The bad image of Kosovo as a tourist destination is the key factor that Kosovo has a lower competitive position compared with countries of the region. The development of activities and tourist marketing in order to improve tourist image of Kosovo are extremely necessary.

An analysis which was made in 2010, concerning competitive tourist position of Kosovo, shows that this position has marked improvement as regards some tourism competition measurement criteria, compared with the analysis that was made in 2007, but Kosovo still remains uncompetitive.⁷ This change is shown on the table 2.⁸

Tab. 2. *The competitive position of Kosovo*

The competitive criteria	Albania	Bosnia & H.	Macedonia	Montenegro	Kosovo
Access	++	+	-/+	++	-/+
International image	-/+	-/+	-/+	++	-
General infrastructure	-/+	-/+	-/+	++	-
The standard of hotels, categorization	-/+	+	-/+	++	-
Value for money	-	-/+	-/+	++	-/+
Private-public cooperation	-/+	-/+	-/+	++	-
Institutional framework support	-/+	-/+	-/+	++	-
Marketing efforts	+	+	-/+	+++	-/+
PR efforts, media coverage	+	+	-/+	+++	-
Investments in tourism sector	+	-/+	-/+	+++	-
Tourism, sun&beaches	+	-	-	+++	-
Cultural tourism	-/+	+	+	+	-/+

⁷ The tourism development strategy in Kosovo 2007-2013, Ministry of Trade and Industry (MTI), Pristina, 2006, 27-34.

⁸ The tourism development strategy in Kosovo 2011-2020, MTI, Tourism Department, Pristina, 2010, 14.

Winter tourism	-	+	+	+	+
Rural, ecological & alternative tourism	-	+	-/+	+	-/+
Packages from travel operators	++	+	-/+	+++	-/+

Source: The tourism development strategy in Kosovo, 2011-2020, MTI, Tourism Department, Pristina, 2010.

+++ = *very strong*, ++ = *strong*, + = *good*, -/+ = *sufficient*, - = *insufficient, poor, bad*

The SWOT Analysis of Tourism Sector in Kosovo

The SWOT analysis below reflects key strengths, weaknesses, opportunities and key threats to the tourist sector in Kosovo.⁹

Strengths: Diversity of nature and rural part that offer various products, geographical position, climate conditions, cultural riches & history (educational and cultural tourism), the hospitality of inhabitants, the awareness of the tourist potentials amongst the stakeholders, huge manpower potential, migration brings the experience and investments in Kosovo, generous private sector.

Weaknesses: The lack of infrastructure (roads, transport, power supply, water, sewerage system, signalization etc.), insufficient urban spatial planning, the lack of (adequate) investments in the tourism sector, the lack of educational institutions in the field of tourism, bad image (or no image) of Kosovo as a tourist destination, the lack of marketing & sales initiatives (there is no tourist portal, no sale guide), the lack of know-how in management & operation in the tourism sector & hospitality, fiscal issues, the lack of security for investments, the lack of friendly crediting policies for SME-s, low economic and social standard of living in Kosovo, the lack of planning as regards protected and ecologic zones, insufficiently developed tourist marketing etc.

Opportunities: The tourism strategy as a good basis for all stakeholders and the creation of public-private partnership (PPP), associations as a platform for marketing, initiatives for trainings & qualitative management, recently constructed new infrastructure (roads etc.), sponsorship for marketing activities, funds of donor organizations (increase in the donors' awareness), foreign investments in the field of tourism, webpage / portal of Kosovo tourism, the creation of the Competence Centre in the tourism sector and hospitality, human resources development, complete legal framework, classifications, standards, cooperation with the neighboring countries, regional and international initiatives, stimulation of local tourism, diversification of tourist product etc.

Threats & Risks: The lack of capacities of relevant institutions, insufficient competition of product and price, the lack of cooperation between public and private sector, insufficient implementation of the tourism strategy, the lack of funds, inadequate

⁹ Ministry of Industry and Trade. Sector Profile of Tourism. [http://mti-ks.org/repository.docs/Sector profile Tourism 130623.pdf](http://mti-ks.org/repository.docs/Sector%20profile%20Tourism%20130623.pdf), page 14.

legal and fiscal issues, insufficient implementation of legal framework, instability in the Balkans Region, the lack of preservation of natural/ecological and cultural resources, economic fall on global level, etc.

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