



Republika e Kosovës

Republika Kosova - Republic of Kosovo

Qeveria - Vlada - Government

Ministria e Industrisë, Ndërmarrësisë dhe Tregtisë

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Kosovo Tourism Strategy

2024-2030

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1. Executive summary

Tourism in Kosovo is operating in a relatively competitive environment. In most of the neighboring countries, tourism is considered a priority sector and incentive measures have been taken to develop it.

Although Kosovo has a suitable strategic-geographical position in the Western Balkans, it has not yet sufficiently utilized the advantages from the global trends of tourism growth. However, tourism in Kosovo has improved in recent years, but it is still organized inefficiently, without strategic objectives and without coherent tourism policies.

Data from the Kosovo Agency of Statistics (KAS) and those from tourism stakeholders show that in the period 2017-2019, the number of visitors increased by 14.2%, while the number of overnight stays increased by 23.9%.

Even the number of employees as well as the impact of activities in hotels and restaurants in BPV was marking a gradual increase, from 1.8% as it was in 2017 to 2.1% during 2019.¹ The years 2020 and 2021 were affected by the outbreak of the Covid-19 pandemic and brought a marked decline in the tourism sector, which, however, recovered in 2022, reaching the same level as the figures of 2019 with 2.1% of BPV. As for the number of visitors for 2022, there was a 60% increase compared to the pre-pandemic period of 2019. Also, the number of overnight stays increased by 67% compared to 2019.

As for the last year in 2023, the number of domestic and foreign visitors has increased by 35% compared to 2022, while the number of net stays of domestic and foreign visitors has increased by 86% compared to 2022. According to the countries where they come from for 2023, visitors from Albania dominate with 25%, followed by those from Germany with 16%, Switzerland with 12%, and Turkey with 7%.²

In this context, the Government of the Republic of Kosovo, in cooperation with line ministries, municipalities and with the help of other tourism actors, is committed to drawing up the state tourism strategy covering the period 2024-2030, to enable the development of tourism on a competitive basis, increasing economic development, employment and beyond.

The 2024-2030 Tourism Strategy and the 2024-2026 Action Plan include 5 strategic objectives:

1. Increase promotional activities and improve information flow.
2. Create and upgrade quality and sustainable infrastructure for tourism development.
3. Expand the tourist offer according to sustainability standards and increase competitiveness.
4. Build human capacities for increasing the number of staff in the labor market and improve services.
5. Improve the regulatory framework and tourism policies.

In order to achieve these objectives aimed at sustainable tourism development, the Government of Kosovo will undertake concrete measures and actions involving all actors through greater cooperation

¹ KAS. Review of National Accounts, 2008-2019. See: <https://ask.rks-gov.net/sq/agjencia-e-statistikave-te-kosoves/add-news/rishikimi-i-llogarive-kombetare-2008-2019>.

² KAS (2023). Hotel Statistics.

and interaction both in the public and private sectors. It is envisaged to raise the promotion of Kosovo's tourism, first of all in international markets and targeted groups of visitors, at a higher and more organized level, giving importance to the provision of necessary information for visitors. On the other hand, measures will be taken for the development of sustainable physical and tourist infrastructure with the aim of easier access to destinations within Kosovo, but also the development of new tourist products. The natural potential of Kosovo should also be considered, hence this strategy includes measures and actions aimed at preserving natural and cultural resources, as well as actions that are friendly to the environment. Special attention has been paid to the support of service providers, where schemes of grenades and other forms of support are foreseen. The strategy will affect the increase in employment, therefore measures and actions are foreseen that will address the needs of the labor market in the tourism sector. Curricula and educational and professional programs will be reviewed in order to raise qualified personnel with European standards. In addition to all these actions, the Government of Kosovo will advance with the development of tourism policies and the completion of the legal framework aligned with the EU and in harmony with European standards.

2. Introduction

Tourism constitutes an important and influential sector in the economy, creating multiple uses and benefits. This sector, among other things, generates income, creates jobs, influences the creation of state infrastructure, as well as promotes cultural exchanges between host countries and visitors.

In Kosovo, based on the advantages and opportunities that the country has, there is a great potential for the development of this sector. Seeing this potential, the Government of the Republic of Kosovo, in its governing programs, treats the development of the tourism sector as one of its priorities. In the Government Program 2021-2025, which is considered as a basic document for the work of the government, the development of sustainable tourism is highlighted as one of the priority areas for sustainable economic development. According to this document, the main focus of the Government in this context is expected to be the development of cultural tourism and natural tourism (mountainous and rural), through the expansion of the tourist offer, the improvement of infrastructure, digitization and the drafting of cross-sectoral plans. In order to concretize these government plans and to more clearly define the strategic orientations of the tourism industry, the need to have a state tourism strategy has emerged. The drafting of this strategy is foreseen in the Government's National Development Plan 2023-2025, while it is also harmonized with the Program for Economic Reforms 2023-2025 and the National Program for European Integration 2023-2027.

Based on the above commitments, the Government of the Republic of Kosovo, in cooperation with the relevant ministries of the line – MCYS, MESPI, MAFRD, MESTI, MIAPA, MFAD, MLGA, municipalities and with the help of other tourism actors, is committed to drawing up the strategy state tourism, covering the period 2024-2030. The work for the design of this strategy was guided by the principles of the "Model of St. Gallen for destination management" (SGDM). This model offers an alternative and innovative approach to understand the complex behaviors and dynamics of tourists. The main focus of this approach is strategic visitor flows. Flow-level analysis explains the factors that influence certain visitor behaviors and the interrelationships they have with demand and supply. This approach has been selected because it allows to reflect the strategic interaction of visitors with the destination and through this to understand more clearly the problems and needs they have.

This strategy contains the general methodology and the steps followed for drafting the strategy; presents global tourism trends; provides a general background, based on the main indicators of the sector; presents the SWOT analysis, which shows the advantages, shortcomings, opportunities and

threats in the field of tourism; explains how to select strategic visitor flows and addresses each of them at a general level and in the context of circumstances; reflects the mapping of relevant tourism actors and their functions; unfolds the vision, presents the objectives and actions; outlines how to monitor and report on the implementation of the strategy; and finally, presents the action plan for the first three years of the strategy.

The Kosovo Tourism Strategy was drafted with the support of external technical assistance from Switzerland through the PPSE project implemented by Swisscontact and UNDP.

3. General methodology

The work for drafting this strategy was guided by the principles of the St. Gallen Model for Destination Management (SGDM). This model offers an alternative and innovative approach to understanding the complex behaviors and dynamics of tourists. The main focus of this approach is strategic visitor flows. Flow-level analysis explains the factors that influence certain visitor behaviors and the interrelationships they have with supply and demand. This approach has been selected because it allows the reflection of the strategic interaction of visitors with the destination and through this to understand more clearly the problems and needs they have.

The SGDM methodology has been developed based on established destinations in Switzerland. The same was then transferred to the context of developing countries by Swisscontact together with the University of St. Gallen (HSG). This methodology is built based on the practical experience gained from over 40 tourist destinations in the world and from the latest developments in destination management. The same methodology was used in the development of the tourism strategy in the Municipality of Prishtina and the Municipality of Prizren.

During its application, this methodology was tailored, initially to adapt to the context and features of the country, as well as to be in harmony with the legal documents for the drafting of strategic documents, namely with Administrative Instruction No. 07/18 on planning and drafting strategic documents and action plans, Manual for planning, developing and monitoring of strategic documents and their action plans, and Regulation (GRK) 05/2016 on minimum standards for the public consultation process.

The following stakeholders were involved in the drafting of this strategy:

1. Ministry of Industry, Entrepreneurship and Trade - MIET
2. Office of the Prime Minister - OPM
3. Office for Strategic Planning -OSP
4. Ministry of Finance – MoF
5. Ministry of Agriculture, Forestry and Rural Development - MAFRD
6. Ministry of Culture, Youth and Sports - MCYS
7. Ministry of Environment, Spatial Planning and Infrastructure - MESPI
8. Ministry of Education, Science and Technology - MEST
9. Ministry of Local Government Administration – MLGA
10. Mountaineering Federation of Kosovo
11. GUIDEKS - Association of tourist guides of Kosovo
12. NGO Marimangat
13. Union of Tourism of Kosovo - UTK
14. UNDP

15. PPSE / Swisscontact

The main steps of the strategy development process are outlined below.

Table 1: The main steps during the drafting of the strategy

Mapping and selection of strategic visitor flows	Initially, the working group, consisting of representatives of central level institutions and shareholders from civil society organizations, worked on the preparation of an extensive list of visitor flows. Based on the quantitative evaluations and the discussions of a qualitative nature developed by the working group, the flows that demonstrate the greatest economic potential, as well as the potential for sustainable development, were prioritized.
Workshop and focus groups	Afterwards, an initial workshop was organized with different participants from the tourism industry (representatives of central and local institutions, representatives of NGOs, tour operators and other actors of the private sector) in order to inform them about the methodology and the process. As a continuation of this workshop, thematic focus groups were organized for data collection.
Individual meetings with shareholders	After the analysis of the data collected during the focus groups, individual meetings were held with tourism stakeholders, most of them from the private sector, to further verify and complete the data collected, as well as to discuss the strategic orientations and necessary actions.
Workshop with the working group	Furthermore, a workshop was organized with the working group, where based on the collected data and the good practices of other countries, the objectives and actions of the strategy were drafted, as well as harmonized with other planning documents. At the same time, the action plan was compiled. At this stage, assistance was also provided by foreign experts from UNDP and Swisscontact.
Public consultations	Finally, the draft strategy was shared with all parties, and before finalization, the draft was submitted for preliminary consultation, and public consultations were organized to receive additional opinions and to ensure that the strategy conforms to the expectations of the general public.

4. Global tourism trends

Tourism is one of the most influential sectors in economic development and job creation in the world, and plays an important role in empowering women, youth and other social groups. Before the COVID-19 pandemic, the travel and tourism sector had an economic size of USD 9.2 billion, which is about 10.4% of the global economy; and was responsible for 334 million jobs, accounting for 10.6% of world employment.³ More than half of the employees are women.⁴ From 2015-2020, one in five new jobs created are from the travel and tourism sector. Tourism growth in 2019 was around 3.5%, higher than the overall economic growth rate in the world, for the ninth year in a row.⁵ In 2022, the Travel and Tourism sector contributed 7.6% to global GDP; an increase of 22% from 2021 and only 23% below 2019 levels. In 2022, there were 22 million new jobs, representing a 7.9% increase from 2021 and only 11.4% less than 2019.

In the same year, the countries most visited by tourists were France with 48.4 million visitors, Mexico with 31.9 million, Spain with 31.2 million, Turkey with 29.9 million and Italy with 26.9 million visitors.

Since 2020, tourism has experienced an unprecedented challenge, becoming one of the sectors most affected by the Covid-19 pandemic. According to UNWTO estimates, foreign visitor arrivals had decreased by 73%.⁶ The travel and tourism sector suffered losses amounting to almost USD 4.5 billion, the contribution to the Gross Domestic Product (GDP) decreased by 49.1% compared to 2019 and 18.5% of jobs in the sector were lost.⁷ UNWTO estimates that losses from international tourism revenues were around USD 2 trillion for 2020 and 2021⁸. Recent data from the UNWTO show that in 2021 the number of tourists in the world was 1 billion less than before the pandemic period, whereas in 2022, although the number of international tourists in the world increased significantly compared to 2021, this number remains 54% below the number of tourists in 2019.

Below, the main global trends in the tourism sector in the last decade are presented. The definition of visitor flows and the determination of strategic orientations, to a large extent, have been done in the spirit of these trends.

³ WTTC (2020). Economic impact reports. See: <https://wtcc.org/Research/Economic-Impact>.

⁴ UN Women (2019). Global report on women in tourism. See: <https://www.unwomen.org/en/news/stories/2019/11/announcer-second-edition-of-global-report-on-women-in-tourism>.

⁵ WTTC (2020). Travel and tourism – global economic impact 2020. See: <https://wtcc.org/Portals/0/Documents/Reports/2020/Global%20Economic%20Impact%20Trends%202020.pdf?ver=2021-02-25-183118-360>.

⁶ UNWTO (2020). Impact assessment of the Covid-19 outbreak on international tourism. See: <https://www.unwto.org/international-tourism-and-covid-19>.

⁷ WTTC (2020). Economic impact assessment. See: <https://wtcc.org/Research/Economic-Impact>.

⁸ UNWTO (2022). Impact assessment of the Covid-19 outbreak on international tourism. See: <https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism>.

Table 2: Trends in the tourism sector

Experience	Tourists are increasingly interested in experiencing tourist destinations that are unique and authentic. Tourists are not content with just a visit as simple observers. They are more interested in learning about the culture and history of the destination, having adventures that will be remembered for a lifetime, establishing direct contact with the local community, as well as developing interactive activities that engage all their senses; all this to make their experience unforgettable. In other words, the experiential aspect has become something essential in contemporary tourism.
Digital transformation	Destination research, inspiration for future vacations and bookings are mostly done through online platforms (booking.com, tripadvisor, trivago, airbnb – to name a few). All this transformation offers opportunities for the entire tourist experience to be more manageable. The digital transformation and in particular the popularization of social media has also provided opportunities for consumers to share their impressions and evaluations more easily. Although this reduces the control of tour operators on the information published about their services, this should nevertheless be taken as an encouragement for them to address the concerns of visitors and thus improve their products and services. Innovation and digitization have also transformed the provision of services by businesses, not only through online booking platforms, but also through the promotion of contactless technologies upon arrival at the destination, as consumers are now looking for safe and hassle-free travel experiences.
Safety	Safety is one of the most vital aspects in the promotion and development of tourism. The success of a tourist destination depends on the country's ability to provide a safe environment for visitors. This issue has become extremely important in recent years with the spread of terrorist acts and with the spread of pandemics, especially the latter. It should be noted that in addition to physical safety, nowadays data protection and integrity, food safety and health in general are determining aspects to convince tourists to visit a country. Furthermore, a safe environment is expected at all steps of the tourist experience (transportation, accommodation, food services, tours, etc.). Therefore, a strong coordination of the value chain is required to guarantee safety.
Sustainability	The concept of sustainability has become part of the agenda in recent decades. While at the beginning the focus was on the environmental pillar, later the confrontation of some destinations with over-tourism situations has led to raising awareness of social concerns as well. These developments have been more pronounced in unbalanced destinations, where local residents have suffered from the negative impacts of uncontrolled growth; the sentiment created in some cases has even led to protests.

	Regarding environmental sustainability, in the last two years, especially since the Paris Agreement, there has been an intensification of commitment to address climate issues and calls for decarbonization of the sector have increased; at the same time, efforts have increased for the development of the sector to be in harmony with the Sustainable Development Goals (SDG), which affect all spheres of sustainability. As a result of this frustration, more and more efforts are being made to develop practices that promote sustainable behavior that protects the environment and local residents, while not sacrificing tourism revenue. Sustainability is relevant especially in Kosovo, given that there are many protected areas, which in case of non-implementation of sustainable interventions, are at risk of degradation.
New markets	Asian markets: The rapid pace of economic development, market openness, and travel facilities has made Asia one of the largest sources of tourism in the world. At the country level, China is the fastest growing source of foreign tourists, and as of 2012 the largest spender in international tourism. Millennials: Driven by experiential travel and social media, millennials have become a category of tourists who play an important role in shaping world tourism. Solo female travelers: The interest and number of solo female travelers is gradually increasing, especially in recent years. For example, the average google search for this category has increased significantly over the years. Many tour operators are now nurturing this segment of tourism, empowering many destination women to take leadership roles in the tourism offer. Pensioners (65+): Pensioners are very intensive travelers and an essential segment of tourism in the world. On average, they make up about 20% of international tourism. One of the reasons why they travel is the free time they have available. They aim to understand more about the history of the countries and have opportunities for socializing. Digital nomads: This segment consists of profiles who are users of digital technologies and innovations, who recently mainly work from home. Many destinations around the world (including various islands) are aiming to attract this potential segment.
Slow and local travel	The pandemic has inevitably brought restrictions on travel, forcing vacations to be spent domestically for many travelers interested in familiar, predictable and reliable destinations. Rural areas and outdoor spaces that offer opportunities to enjoy with family, relatives and friends, as well as to enjoy local gastronomy, are very popular.

5. Background

Before the outbreak of the COVID-19 pandemic, tourism in Kosovo had been growing at a significant rate, giving signs that it is a sector with a lot of potential for the country. In the period 2017-19, the arrivals of foreign visitors registered at all border points of Kosovo had increased by 10.7 %, from 4.48

million in 2017 to 4.96 million in 2019. The purpose of the visit in about 76% of cases in 2019 was to visit friends and relatives. Other recorded arrivals were transitory, for the purpose of daily rest and for work. According to origin, in 2019 arrivals from the region dominated, mainly from Serbia (28.2%), Albania (25.6%) and North Macedonia (21.9%), while globally arrivals from Germany (4.6%) and Switzerland (4.2%), countries where the Kosovar Diaspora is concentrated, dominated.⁹

Moreover, the official data of TAK on accommodation capacities show that in Kosovo during the period 2017-19, the number of foreign and local overnight visitors also recorded an increase of 14.2%, from 251 thousand to 287 thousand; at the same time, the average overnight stays also increased, from 1.58 to 1.70 nights. The regions with the most overnight visitors were Prishtina with 42.7%, Peja with 22.7% and Prizren with 19.2%. According to the countries they come from, visitors from Germany dominated with 19.6%, Albania with 10.4%, Turkey with 8.3% and Switzerland with 7.9%.¹⁰ Kosovo does not have a standard statistical framework for the impact of tourism on the economy, and as a result, official data in this regard are missing. A research developed by Swisscontact in Kosovo, which, among other things, evaluates the turnover and the number of workers related to tourism in accommodation capacities and restaurants, as two key categories of the tourism offer, gives clear indications for the contribution of this sector in the economy. Specifically, the joint turnover of these two categories, according to the research in question, was EUR 218.1 million in 2019, while the number of employees was around 12.1 thousand.¹¹ To put things in perspective, these values constitute approximately 3% of GDP and the total number of employees in Kosovo in the same period. As a sector as a whole, together with the accompanying industries, the impact on the economy is even greater.

From the beginning of 2020, like in all countries of the world, the tourism sector in Kosovo faced a major crisis as a result of the Covid-19 pandemic. The data from KAS for the first three quarters of 2020 show that the number of visitors was 51.95% lower compared to the previous year, while the net stays of foreign visitors were reduced by 52.50%. As for the economic impact, the Swisscontact supported research mentioned above also estimates that in 2020, the overall losses in income in accommodation and restaurants ranged from EUR 98.6 million to EUR 110.2 million.

Fortunately, the tourism sector in Kosovo has not only shown signs of recovery, but also exceeded the figures of 2019, which according to tourism stakeholders, is known as the year with the highest peak of development and income for this sector.

In general, despite the potential it has, tourism in Kosovo is still not efficiently organized, and it is limping due to regulatory deficiencies and incoherent policies. The development of tourism in recent years is mainly attributed to the entrepreneurial initiatives of the private sector. Although this is a good indicator, tourism, however, is a sector that also needs interventions, policies and public actions and, above all, a clear strategic orientation. Unlike Kosovo, most neighboring countries have developed significant support for the sector in line with EU policies. Considering the whole context, Kosovo needs a strategic and systematic approach to enable the development of tourism activity on a competitive basis, stimulating quality, protecting consumer rights and being open to international cooperation.

⁹ KAS (2020). Hotel Statistics.

¹⁰ Ibid.

¹¹ Swisscontact-PPSE (2020) Kosovo Tourism Supply Side Survey 2019. See: https://ppse-kosovo.org/file/repository/Kosovo_Tourism_Supply_Side_Survey_2020_ALB.pdf

6. SWOT analysis

The SWOT analysis provides a general overview of the strengths and weaknesses of the tourism sector in Kosovo, and at the same time highlights the opportunities and the main threats.

Strengths	Weaknesses
• Popular destination among all generations of the Diaspora • Natural resources (mountains, rivers, lakes, waterfalls, etc.) suitable for tourist activities • Cultural heritage (museums, mosques, churches, monasteries, etc.) • Craft activities • Famous traditional and modern music and film festivals • Emphasized hospitality tradition • Interfaith tolerance within the industry and in communities at large • Mastery of English and German by most tourism actors • Bargain prices in restaurants, local transport and other similar services • Traditional cuisine, gastronomy that is part of everyday life • The first successful participations in international fairs Support systems: • Developed road infrastructure (new airport and new highways) • The spread of the Internet in every corner of Kosovo • High level of safety throughout the sector.	• Lack of infrastructure in skiing centers • Poor waste management in protected areas • Limited offer of tourist products for visitors who are interested in engaging in tourist activities • High cost of accommodations and flights compared to the region • Lack of functional hostels in mountainous areas • Lack of willingness from the private sector to commercialize tourism products • Limited number of certified tourist guides compared to the need • Specific infrastructure for tourist destinations (including electrical capacities, paths, accommodation, etc.) not developed • Lack of standardized marking • Inadequate access to cultural heritage monuments • Insufficient and aimless promotion of the tourist offer • Unfavorable visa regime for Asian countries with visitor potential • Mismanagement of visitor centers in municipalities • Limited use of modern communication methods for promotional purposes • Limited cooperation with foreign tour operators. Support systems: • Lack of appropriate law and regulations for tourism development • Insufficient funds for public actors to take an active and systematic role in the development of tourism, as well as the lack of fiscal and financial incentives for the development of the sector • Limited knowledge and experience in attracting strategic investments • Limited cooperation between tourism actors • Lack of awareness by tourism stakeholders about the importance and potential of the tourism sector.

Opportunities	Threats
• Suitable geographical position in the region • The climate is suitable for different types of tourism • The sustainability of the diaspora flow that continues to visit Kosovo despite the pandemic • Returning visitors' interest in nature and space creates potential for job creation through rural and mountainous tourism.	• Stagnations in the development and advancement of mountainous and adventure tourism can affect Kosovo not being competitive in the region. • Negative information in the international arena • Inadequate protection of cultural heritage sites • Lack of economic stability in the country • Unfavorable climate of doing business in the country • Limited inter-institutional coordination • The limited interest of foreign donors to support the development of tourism in Kosovo and the reduction of foreign donations dedicated to tourism.

7. Detailed situation analysis

In this section, the broad list of strategic flows of visitors is first presented, the way of their definition is explained and the methodology of selecting those with priority for the period covered by the strategy is shown; further, the state of each of the selected flows is reflected in a general context and finally, a general grouping of the identified problems is offered.

a. Selection of strategic flows of visitors

The working group, together with the other actors involved in the drafting of the strategy, initially prepared an extensive list of visitor flows in Kosovo. During this process, discussions were held among the actors to ensure that the proposed flows exist in Kosovo, have potential for the future and are sufficiently distinct from one another. As this strategy is developed at the country level, to avoid repetition and unnecessary details, in certain cases, several sub-flows that had similarities with each other have been merged within a single basic flow, always ensuring as not to overlook important information for identifying problems and challenges.

In order for the objectives and actions proposed in the strategy to be as concrete as possible for the time frame covered by this document, from the wide list of visitor flows, those with the highest potential for tourism development in Kosovo in a long-term context were selected. In order to ensure as much objectivity as possible, the working group agreed to define some main criteria, based on which the selection was made. In total, seven criteria were identified, which were also weighted according to their importance (see Table 3). Then, each flow of visitors from the extensive list was rated or evaluated against the criteria defined with grades from 1 to 5, where grade 1 indicates a total lack of potential, while grade 5 indicates full potential. Finally, the individual ratings are weighted, and overall averages derived.

Table 3: Evaluation criteria of potential visitor flows

Evaluation criteria	Weight
1. Potential for increasing the number of visitors	20%
2. Potential to spend	20%
3. Potential for job generation (for youth and women)	20%
4. Potential for economic, socio-cultural and environmental sustainability	15%
5. Potential for engagement of tourism actors	10%
6. Connection with the country's strategic goals	10%
7. Potential for successful development of interventions	5%

In line with expectations that tourism will contribute to the economic development of the country, 60% of the evaluation criteria have direct economic effects. The sustainability criterion was evaluated a little lower next to the economic criteria. This, however, has not influenced the selection of flows that do not coincide with the sustainable development of tourism. Particular emphasis was placed on sustainability during the drafting of objectives and actions.

Table 4 presents the ranking of all visitor flows according to the evaluations conducted. From all the potential flows, only the first 12 (with a rating above 60%) were selected to be treated further in this strategy. It should be mentioned that the ranking of the 12 selected flows does not play any special role in the objectives and activities proposed in this strategy, because the primary aim of the evaluation was to divide the flows with the highest priority (i.e. the first 12) from those with less priority (i.e. the last 8) .

Table 4: Prioritization of visitor flows

No.	List of visitor flows	Average
1	Diaspora: young explorers	79.8%
2	Asian groups on Balkan tours	78.7%
3	Visitors for alpine skiing and other similar winter sports	75.3%
4	Visitors from Albania during weekends	73.7%
5	Visitors for adventure tourism	73.2%
6	Diaspora: first generation nostalgics	71.8%
7	Western visitors of cultural heritage	70.0%
8	Visitors of cultural festivals	69.8%
9	Travelers for business purposes	68.5%
10	Free and independent travelers exploring the Balkans	65.5%
11	Visitors for winter activities	63.5%
12	Night life visitors from the region	63.2%
13	Dental tourists	59.9%
14	Cultural visitors from Turkey	59.7%
15	Low budget “backpackers” exploring the Balkans	59.2%
16	Individual travelers exploring the Balkans	59.2%
17	Pensioner groups on Balkan tours	56.5%
18	European explorers with low budget flights	52.5%
19	Organized family groups from the Middle East	51.5%
20	Pupils and students in excursions	51.5%

a. Baseline analysis of visitor flows

The basic analysis of the state of tourism in Kosovo was made under the lens of 12 strategic flows of selected visitors. Due to the lack of ready data at the flow level, the analysis was developed mainly using the inputs from the focus groups and follow-up interviews with different actors of tourism, especially with representatives from the private sector. The number of visitors, where possible, was estimated based on gross data from KAS.

The approach at the level of flows, among other things, has enabled the overview of visitors to Kosovo, their interaction with the destination, the motives and impact of the arrival, as well as the offer in general along with its advantages and challenges, to be clearer.

Based on this approach, the tables in the next sub-section aim to provide answers to the questions posed below. Note that the advantages and challenges may involve more than one strategic flow of visitors. However, to avoid repetition, it has been attempted to present them only in the flow most relevant to that priority or challenge/problem.

- What is the origin of the visitors?
- How old are they?
- How long is their stay?
- What are their main activities?
- What is the spending potential?
- What motivates them to visit the destination?
- What has influenced their arrival?
- What works? What are the main advantages?
- What is not working/missing?
- What are the challenges?

RV1: Diaspora: The Young Explorers	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	Young explorers from the Diaspora (henceforth: young explorers) come mainly from Western European countries but also from other countries where the Kosovar Diaspora community is concentrated. The dominant age of young explorers is between 18 and 30 years old. The number of young explorers per year is estimated to be around 250,000. A significant part of them are students. These visitors come every year, and usually in the summer and winter season. Unlike the nostalgics of the first generation, this flow has a shorter visit duration, one to two weeks. Young explorers mostly stay with relatives, but recently, some of them visit solo and stay in hostels, because they prefer to have their privacy. In general, they have average potential to spend, especially those of the upper age limit. With the exception of nightlife, young explorers do not develop enough other activities to experience the culture. For example, museums and other cultural sites are rarely visited by young explorers. They mainly travel by plane; most with cheap tickets booked in advance.
Motive of visit	Visiting relatives and society; maintaining ties with the country of origin; finding a partner; making friends and practicing the language; experiencing the nightlife; participation in family parties (weddings).
Main influencer of the visit	Parents and family members in Kosovo; have been coming to Kosovo since childhood.
What works? What are the advantages?	The willingness of relatives to accompany them during their stay makes the visit more attractive. There is a large number of night clubs; and the night life is quite cheap compared to other countries. Taxi and rental car prices are relatively low. The wedding industry and related services are very active during the Diaspora's stay in Kosovo.
What is not working/missing? What are the challenges?	This flow of visitors has a lack of information about the organization of tourist activities and events in tourist destinations. There are not enough souvenirs available for sale near the cultural sites. There is not enough incentive to promote the national heritage of young explorers. The foreign society of young explorers is very little targeted through the latter.

RV2: Asian groups on Balkan tours	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	From the Asian market before the pandemic period, visitors from Japan dominated. In recent years, there has been a greater influx of visitors coming from Malaysia, Indonesia, Singapore and Hong Kong. According to observations, this flow will recover with delay, compared to other flows. In 2022, an increased number of tourists from the Middle East has been observed due to "charter" flights with Albania. The vast majority of Asians come as part of two- to three-week Balkan tours, through tour operators from the region who have agreements with Asian tour operators. In Kosovo, Asians come mainly from tour operators of North Macedonia and Albania. Tour operators from Albania engage guides from Kosovo, while those from North Macedonia do not. The Asian groups have their own translators with them to translate from English into the respective Asian languages. Asian groups usually visit Prizren (mainly in summer) or Prishtina/Gracanica during the day. There are times when they also visit Decan. They mainly target cultural heritage monuments, especially those protected by UNESCO, as well as the squares/centers of the cities they visit. This flow, in general, considers Kosovo more like transit and very few are dormant. Asian groups consist of 20-30 people and come in buses of tour operators. The vast majority are over 50 years old, and pensioners dominate. In total, during the year there are about 10 thousand visitors in this flow. The biggest flow is in spring, late summer and early autumn. Asian groups have great potential to spend, but they do not spend much in Kosovo.
Motive of visit	Visiting cultural heritage monuments; exploring the Balkan countries; exploring a new country.
Main influencer of the visit	Balkan tour packages from tour operators in the region.
What works? What are the advantages?	The hospitality and friendliness of the people is unique; prices in restaurants are reasonable. The safety offered by the country is very high and contrary to the preconceptions of this flow of visitors. There is a cooperation of tourist guides with tour operators from Albania and North Macedonia. The highway with Albania and North Macedonia and the quick access to Kosovo from these two countries makes the visit easier.
What is not working/missing? What are the challenges?	Compared to other countries in the region, the price of accommodation is higher. The length of stay is quite short. Traditional food is not promoted enough. A large number of tourist guides work informally, do not use international platforms for promotion, and have a problem with precise time planning in relation to Asians. Visas applied to Asian countries make it difficult for them to enter Kosovo during tours.

RV3: Visitors for alpine skiing and other similar winter sports	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	Most visitors for winter sports, namely alpine skiing, are local and from Albania. The latter come up to three times a year. There are three ski resorts (centers) in Kosovo that are frequented by this category of visitors: Brezovica, Boga and Brod. The season usually starts in December and lasts until the end of April. Most visitors are amateur skiers who use these centers for recreational purposes. Visitors are mostly young people up to the age of 40. The average amount they spend during a day is around 40 EUR. Visitors from Albania spend around 120 EUR in a weekend. Those who ski regularly are upper middle class, in general.
Motive of visit	Skiing and other winter sports
Main influencer of the visit	Mainly traditional visitors; tour operators.
What works? What are the advantages?	The prices to develop winter sports in Kosovo are more affordable compared to the region, namely North Macedonia, Serbia and Montenegro. The ski trails are suitable for amateur skiers. The two biggest centers for winter sports, Brezovica and Brod, are close to big cities like Prishtina and Prizren. In recent years, wooden villas have been built with relatively good conditions.
What is not working/missing? What are the challenges?	The limited number of accommodations has influenced the high prices for accommodation during the season in Brezovica. In all winter sports destinations, there is no categorization of tracks according to difficulty level and age. No lights for night skiing in all winter sports destinations; The cable car and ski lifts in Brezovica operate with limited hours; There is a lack of physical infrastructure in areas with potential, such as those in Bjeshket e Nemuna and those of Beleg or other potential areas. There are not enough parking spaces; during the winter period, Brezovica and Boga have problems with managing the flow of tourists. Tour operators do not offer packages that include opportunities to develop cultural tourism on one of the days of stay, considering the proximity to historical cities. There are no international winter festivals that would help promote Kosovo.

RV4: Visitors from Albania during weekends	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	These visitors come from different cities of Albania. Those from Northern and Central Albania dominate, due to the (geographical) proximity to Kosovo. Day visitors mainly visit the city of Prizren, usually for lunch and shopping. They are family members and travel with their private vehicles. There is a large flow during the holidays, especially on November 28, due to the League of Prizren. Visitors with accommodation, on the other hand, mainly aim for three destinations: Prevala, Brezovica and Boga. There are visits from this flow almost throughout the year. In general, the ages are different; during the winter the younger ages dominate. Most are visitors who come on a regular basis and independently. Some also come through tour operators from Albania and Kosovo. The usual length of their stay is two nights per weekend. They are mainly visitors with medium or high spending potential. It is estimated that their total number during the year is around 200,000, including day-stayers and those with overnight stays.
Motive of visit	Experiencing mountain areas; spending a weekend in a nearby country outside Albania; experiencing snow during the winter; national cultural heritage for daily shopping, visiting cities, etc.
Main influencer of the visit	References from Kosovar friends who visit Albania during the summer; tour operators from Albania and Kosovo; experiences from previous visits, generally word of mouth.
What works? What are the advantages?	The road infrastructure that connects different countries of Albania with Kosovo is satisfactory. Communication is easier, since the same language is spoken, and the culture is the same. Culinary is similar and suitable for the taste of visitors. The natural beauties of Sharr and Rugova mountains are a great advantage. The slopes are relatively suitable for amateur skiing. There is a presence of a number of tour operators from Kosovo in Albania.
What is not working/missing? What are the challenges?	There is no exact data on the daily flow of visitors from Albania. There is a lack of proper cooperation between tour operators and accommodations, especially hotels. There are not enough accommodations in mountain areas that accommodate visitors interested in specific products; there is no clear definition of suitable areas for hotel construction and the accompanying infrastructure is missing. Accommodation prices are non-competitive. There is not enough promotion of craft activities in the cities that are most frequented by this flow, namely in Peja and Prizren. There is a lack of authentic souvenirs with national motifs in cultural spaces; in the League of Prizren premises, for example.

RV 5: Foreign visitors for adventure tourism	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	One of the main destinations for adventure visitors in Kosovo is the region of Peja (Rugova Mountain), followed by the region of Prizren (Sharr Mountains), Istog, Mokne Mountain, etc. Of the approximately 65,000 visitors (with 150,000 overnight stays) that this flow has annually, about 40% are foreigners, mainly from Germany, England and the countries of Central Europe. The cross-border trail "Peaks of the Balkans", which includes Kosovo (Peja as the gateway), Albania and Montenegro, is a generator of adventure tourism, with about 5,000 foreign visitors. Foreign visitors mainly come through Prishtina and Tirana airports. The starting point in Kosovo is from Reka e Allages, to then cover villages such as Pepaj, Drelaj, Kuçishta and Milishevc. The stay in Kosovo is two to four nights. Sleeping is done in guesthouses. Visitors belong to the middle class and spend around EUR 200-300 in Kosovo. In addition to this path, there are other cross-border paths as, for example, Via Dinarica, but with a smaller number of visitors. There is also a significant number of adventure visitors coming from the region, mainly from Albania, through travel agencies. They use tourist products in Rugova Mountain, such as Via Ferrata, paragliding and other similar products. Their spending at the destination is around EUR 30. The Sharr Mountains in the Prizren region are another important adventure tourism destination. Visitors who go hiking dominate. The age of foreign adventure tourism visitors varies from 20 to 50 years. Adventure tourism starts in spring and continues until July. The pace decreases significantly in August, to reactivate again from mid-September to the beginning of November.
Motive of visit	Experiencing nature; the conquest of the highest mountain peaks in Kosovo; doing adventure activities, experiencing unique experiences and adrenaline.
Main influencer of the visit	Local tour operators (about 10 in total); agencies from Albania; foreign federations of hunters; websites.
What works? What are the advantages?	There are a number of local tour operators with relatively high quality services. The local community has become more aware of the benefits of adventure tourism as a result of the promotion. The Dukagjini Plain has potential for the development of "rock-climbing" products.
What is not working/missing? What are the challenges?	The definition and standardization of paths is largely lacking. Signs and markings are missing. On the hiking trails in the Sharr Mountains, the stopping points are not clearly defined. Waste management is a very big problem. The accommodation infrastructure in deep mountain areas is not adequate; there are not enough hostels. Classification of existing hostels is missing. Other mountain areas suitable for adventure tourism, such as Shala e Bajgores, are not part of the tour operators' itineraries. There is not enough cooperation of tour operators with international networks.

RV6: Diaspora: First Generation Nostalgics	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	First-generation Diaspora nostalgics make up one of the flows with the largest number of visitors in the country – about 200,000. Germany and Switzerland are the two countries with the largest concentration of this category, as well as the Diaspora in general. Nostalgics usually come to Kosovo twice a year. The first time is during the summer (July or August), where they stay for approximately two to three weeks. It is worth noting that after the functionalization of the National Road, nostalgic people spend half of their time on the coast of Albania. The second time they visit is during the winter holidays (at the end of December), where they stay shorter, usually a week. Diaspora nostalgics mainly travel through the Prishtina airport. Unlike the younger generations who have recently been using AirBnB to a large extent, they stay in their own homes or with their families. Also, it is worth mentioning that the older generation does not use the summer for holidays in other countries except Kosovo and Albania. In general, Diaspora nostalgics belong to the middle class and have the potential to spend. During their stay in Kosovo, they spend most of their time with family members. They frequent many restaurants. They spend a lot on parties. Compared to the first generation, they spend less on shopping. A number of them use the opportunity to perform dental services.
Motive of visit	Visiting relatives and society; the opportunity to spend the holidays on the Albanian coast; dental services; maintaining ties with the country of origin; attending parties.
Main influencer of the visit	Family members in Kosovo; their visits are traditional since the time of migration.
What works? What are the advantages?	Frequent flights with countries where a large number of these nostalgics live. The wedding and party industry in general is quite developed. The prices for dental services are much lower than in the countries where the Diaspora comes from.
What is not working/missing? What are the challenges?	Although Diaspora nostalgics like agritourism, the offer in Kosovo is limited. The first generation is not engaged enough to promote Kosovo as a tourist destination in their countries of origin. The high prices of flights to Kosovo during the period when the nostalgics arrive reach their peak. There is a lack of cultural heritage experience packages with national motifs that are dedicated to this flow. Long queues at the borders and the payment of the green card negatively affect those who come by vehicle.

RV 7: Western explorers of cultural heritage	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	Western explorers of cultural heritage are mainly from Germany, Central Europe, Scandinavia and the USA. These visitors come as part of Balkan tours and on their own. Those who are part of the Balkan tours usually come during the day - so they do not stay overnight in Kosovo. It is estimated that there are about 100 groups of about 25 visitors each - a total of approximately 2,500 visitors per year. Those who come individually usually stay 2 to 3 nights in Kosovo; they stay in hotels. The dominant age is over 50 years old. Those who come as part of tours mostly do not spend, except for food. Others who come individually spend EUR 50 during their stay. The period when this category of tourists mostly comes is May-October; the summer period is a bit quieter. The sites most visited by this flow are: National Museum, Ethnographic Museum, Ulpiana, Gracanica Monastery, Sultan Murati Mausoleum, the Monastery of Decan, the Patriarchate of Peja, the Castle of Prizren, the Mosque of Sinan Pasha, the Church of Saint Premta, the Bath of Gazi Mehmet Pasha, etc.
Motive of visit	Visiting cultural heritage monuments; visiting all Balkan countries; exploring a new country.
Main influencer of the visit	Foreign tour operators; online platforms such as Booking.com
What works? What are the advantages?	Hotels in countries where there are major cultural heritage sites have high ratings according to booking.com. There are over 1,500 cultural heritage assets under temporary protection in the categories of archaeology, architecture and spiritual heritage. In the historical cities of Kosovo, there is a close distance between the monuments of cultural heritage.
What is not working/missing? What are the challenges?	There is a lack of clear mechanisms for the protection and preservation of cultural heritage in accordance with international standards. A limited number of cultural heritage sites are included in various digital maps (such as: google maps, maps.me, etc.) There is insufficient signage for cultural heritage attractions. There are no standardized information plates showing the history of the cultural heritage; promotion is not sufficient. The potential for “dark tourism” is not used.¹²

¹²Definition of Dark Tourism: “tourism that involves travel to places historically associated with death and tragedy”

RV8: Visitors of cultural festivals from the region	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	Visitors to cultural festivals are mainly local or from the diaspora; a not very large percentage come from the region, EU countries and the USA. The festivals that dominate the most are those of music and film. The most famous, especially in the international arena, are the short film festival in Prizren Dokufest; the international music festival in Prishtina Sunny Hill Festival, and the international animation festival in Peja Anibar. Dokufest is estimated to have approximately 60,000 visitors, about 40% of whom are foreigners; Sunny Hill Festival in the last year of the organization had about 90,000 visitors, approximately 15% of whom were foreigners; Anibar usually has about 15,000 visitors, approximately 40% of whom are foreigners.¹³ Other festivals, such as PriFilm Fest, Beer Fest, Chopin Piano Fest Pristina, are smaller festivals and mainly generate interest from local visitors. In total, there are more than 30 festivals that are traditionally organized. The number of foreign visitors from the region is estimated to be around 40,000. The three big festivals are dominated by younger visitors, mostly up to 30 years old. Most festivals in Kosovo are concentrated in the summer period. There are very few festivals at other times of the year. Foreigners are overnighers and stay for 1-3 nights on average, depending on the festival. Spending potential is average.
Motive of visit	Singers, actors, directors and generally world-renowned artists; experiencing a festival in another country; accompanying activities that are organized by the festivals.
Main influencer of the visit	Promotion in social networks; promotion from earlier visitors; line-up of the festival; promotion by the artists themselves; promotion through the festival website; Informational/promotional sessions in the region.
What works? What are the advantages?	The organizational staff at traditional festivals is experienced. All points of interest (bars, restaurants, accommodation and similar) are within walking distance. Relations with world-renowned artists.
What is not working/missing? What are the challenges?	There is not enough support to help small festivals internationalize. There is a limited cooperation with local and foreign tour operators to promote the festivals. There are not enough daytime activities for visitors to Dokufest and other big festivals. Festivals are concentrated in a certain period of the year and some of them interfere with each other. An internationally promoted calendar of cultural festivals is missing.

¹³Swisscontact-PPSE (2020) Tourism supply survey in Kosovo 2019

RV9: Travelers for business purposes	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	Business travelers are mainly from the region and Turkey and are usually responsible for business representatives/branches in Kosovo. A significant number also come within the framework of development projects in the country. In total, there are about 12,000 visitor arrivals per year. Those from the EU and the USA dominate. Excluding work-related activities, very few of them spend time consuming Kosovo's culture and nature. The dominant age of business travelers is from 35 to 55 years old. In almost all cases, they stay in hotels, usually in the center of the cities where they do business. They are regular visitors with a stay of one to three nights. During their stay they spend around EUR 150-300. In general, they have great spending potential. There is no particular time of the year when the flow is greatest – the arrival of business travelers is largely uniform.
Motive of visit	Doing business in Kosovo; coordination with the representative offices/branches operating in Kosovo; providing technical assistance in development projects.
Main influencer of the visit	Businesses, representative offices of foreign businesses; donors; implementers of development projects.
What works? What are the advantages?	Hotels where foreign businessmen stay have modern meeting and conference rooms. In Prishtina, where this flow mainly gravitates, a culinary tradition has developed that is appreciated by businessmen. Taxi services in cities are of good quality and reasonably priced. Free labor is an advantage in doing business in Kosovo.
What is not working/missing? What are the challenges?	There is a lack of proper and structured information about the possibilities of staying for a longer time, to engage in cultural or mountainous tourism in Kosovo. VAT on accommodation is standard and not reduced, as it is in all neighboring countries and in the vast majority of EU countries. There is a lack of recreational and green spaces at suitable distances. The stay is short, and the focus is only on work-related activities.

RV 10: Free and independent travelers exploring the Balkans	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	Free and independent travelers are mainly small groups (maximum 10 people) from Germany, England, Italy, Scandinavian countries, USA and Canada. Their itineraries, unlike typical Balkan tours, are shorter. Together with Kosovo, these travelers also visit one of the neighboring countries, Albania, most of the times. They come through tour operators and usually start the tour in Kosovo. The tour in Kosovo lasts about three days, on average. They sleep mainly in Prishtina and Prizren, places where they stay most of the time. Recently, even Gjakova, namely the Old Bazaar, has aroused interest among these travelers, who are also considering it for sleeping. Tour operators offer flexible itineraries, depending on travelers' preferences. Typical preferences of this flow are wine tasting and visits to UNESCO sites. Recently, this flow has shown more interest in shopping and buying souvenirs with traditional motifs. They have average spending potential and, in fact, spend more than those in the larger groups. They have more specific requests: bigger rooms, more comfortable transportation, etc. The most common period of visit is in spring or autumn.
Motive of visit	Curiosity for a new destination; interest in the country's history and culture; the impossibility of visiting Kosovo earlier because it is not part of the usual Balkan tours.
Main influencer of the visit	Local tour operator; society or relatives who were on a mission earlier in Kosovo; foreign media.
What works? What are the advantages?	The towers on the Dukagjin plain are attractive and would arouse interest among these visitors. Interfaith tolerance and the opportunity to visit sites from three religions that are in the same city. The flexibility of tour operators to adapt itineraries according to travelers' requirements.
What is not working/missing? What are the challenges?	There is a lack of commercial products for experiencing activities in rural areas. Limited number of tour guides who know languages other than English and, to some extent, German. Unfair competition caused by tour guides operating informally. There is a limited number of museums and many of them do not operate at times convenient for visitors. There is no digital ticketing system in paid tourist attractions. There is a lack of basic official stories/narratives on cultural heritage monuments, especially on those with more complex histories. Flights to Kosovo are more expensive compared to other neighboring countries.

RV11: Winter activity groups	
Profile (<i>country of origin, age, days/nights of stay, spending potential, period of visit, etc.</i>)	This flow consists of small groups of visitors (up to 8 people at most), who develop winter activities, such as, for example, "snow shoeing", "ski touring" and the like. These activities differ from alpine skiing which falls under the category of mass tourism. Although as a flow it is still in the initial stage of development, in recent years the number of visitors has increased significantly (around 1,000 visitors in total), clearly showing the potential it has. Currently, these groups mainly consist of German, French, Polish and Spanish people. Their average age ranges from 30 to 55 years. The two main destinations are the Sharr Mountains and the Rugova Mountains. The period when these visitors come is from December to the end of April. A large number of them come through tour operators from Albania and North Macedonia. Some also come through Kosovo tour operators. There is also interest from foreigners with a mission in Kosovo. Almost everyone is with their own equipment. On average they stay 6 days. They prefer quieter areas, with less traffic. The starting point of the tour is in high areas, and they need transport to get there. They sleep in hostels. In general, they have average spending potential. In recent years, we have had a constant increase in foreign skiers for winter activities such as off-trail and ski touring, especially in Gjeravica. These activities bring to Kosovo customers who stay for about a week in small groups throughout the winter season and not just weekend visitors. Even the massif of Sharr is suitable for offering these activities and with small investments it can be advanced. These visitors are over 40 years old, stay in Kosovo for the whole week and spend around EUR 70 to 200 per day. One day of the winter guide is paid around EUR 120.
Motive of visit	Development of some low-cost winter activities (e.g., snowshoeing).
Main influencer of the visit	Tour operators from Albania and North Macedonia, local tour operators, international magazines.
What works? What are the advantages?	There are fascinating terrains to develop winter activities outside the ski slopes, especially in Gjeravica and Brezovica. The ethnic diversity in the mountainous areas is a peculiarity that visitors appreciate. The liberal regulatory framework offers opportunities for various activities; in many foreign countries there are restrictions in this regard.
What is not working/missing? What are the challenges?	The road infrastructure to mountainous areas with snow is quite problematic; during the winter months it often happens that queues form and wait for hours; alternative routes are missing. There are no trained and certified local tour guides to provide quality services for this flow. There are not enough parking spaces. This has influenced the parking lot prices to be extremely high. There are not enough accommodation capacities, especially in the terrains of the Sharr Mountains. Mountains in other parts of Kosovo, such as Kabashi Mountains, which are suitable for these activities, are not used. Municipalities are not equipped with units and trained staff for search and rescue in the event of an avalanche; there is insufficient information on potential risks.

RV 12: Nightlife visitors from the region	
Profile (<i>country of origin, age, economic level, days/nights of stay, spending potential, period of visit, etc.</i>)	North Macedonia and Albania are two countries from the region where the majority of visitors to Kosovo's nightlife come from. Meanwhile, visitors from Serbia and Montenegro are in smaller numbers. These visitors travel to Kosovo mainly through their private vehicles. The main destination for this flow is Prishtina, where most of the nightlife takes place. The largest flow of these visitors is during the summer, when many parties take place in night clubs, as well as outdoor concerts. Arrivals are mostly during weekends and usually with one night's stay. It should be noted that the winter holiday period also encourages an increased flow of visitors. The vast majority are traditional visitors, although an increase in the number of new visitors has been observed over the years. The dominant ages are between 20 and 40 years. They have a relatively large spending potential, especially those who belong to the upper limit of the dominant age of this flow.
Motive of visit (attraction and main actors)	Nightlife events: DJ parties, concerts, festivals.
Main influencer of the visit	Friends; promotion on social networks, mainly on Facebook and Instagram; word of mouth; marketing agencies in countries of origin.
What works? What are the advantages?	Discotheques have relationships with famous DJs from previous concerts. There is a tradition of organizing electronic music parties in Prishtina. With the exception of minor incidents, the security provided in clubs, discotheques, cafes and in cities in general is at an appropriate level. Nightlife is cheaper compared to other countries in the region; the culture of coffee and brandy is special. There is a satisfactory cooperation between the actors of the night life within the Association of Gastronomes of Kosovo.
What is not working/missing? What are the challenges?	Spaces with accompanying infrastructure dedicated to large concerts are missing. There is no public transport available late at night. Also, in many cities there is a uniform closing time for all bars. There are no tour operators offering nightlife tours where visitors would have the opportunity to experience a night out in a particular city with all its specifics. Local products, such as the house brandy, as well as the stories behind them, are not sufficiently promoted to foreign visitors. The most conservative way of organizing parties.

Table 5 presents the interrelationship of visitor flows with typical segments of the tourism market and shows which visitors may be interested in expanding their activity to other segments in the future.

Table 5: Market segments relevant to existing visitor flows

Visitor flows	Level of interest in typical interest segments		
	✓ = low; ✓✓ = average; ✓✓✓ = high > = there may be interest in this segment in the future x = no interest now or in the future		
	Nature	Adventure	Culture
Diaspora: the young explorers	>	>	✓
Asian groups on Balkan tours	✓✓	✓	✓✓✓
Visitors for alpine skiing and other similar winter sports	✓✓	>	>
Visitors from Albania during weekends	✓✓	>	✓✓
Foreign visitors for adventure tourism	✓✓✓	✓✓✓	>
Diaspora: first generation nostalgics	✓	x	✓✓
Western explorers of cultural heritage	✓✓	x	✓✓✓
Visitors of cultural festivals from the region	>	>	✓✓✓
Travelers for business purposes	✓	>	✓
Free and independent travelers exploring the Balkans	✓✓	✓✓	✓✓
Winter activity groups	✓✓	✓✓	>
Nightlife visitors from the region	x	>	✓

c. Summary of main problems

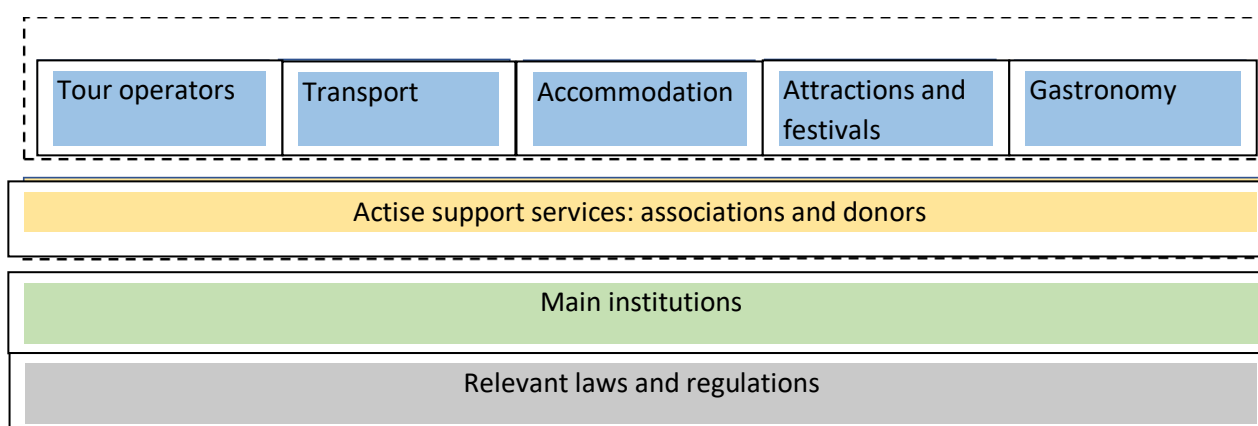
Based on the tourism situation analysis, the problems and challenges in this sector can be grouped as follows:

- There is a lack of a targeted promotional approach of the tourism sector with quality information and systematic cooperation of actors;
- The general and specific infrastructure in tourist destinations is largely undeveloped;
- The tourist offer from the private sector is poor and limps at the level of competitiveness;
- Human capacities to provide tourism services at each level along the value chain are limited;
- The pandemic has caused damage to tourism actors and endangered their survival and sustainability.

8. Mapping of main actors and functions

This section provides a brief description of the main actors and functions in the tourism sector in Kosovo, as well as sheds light on active supporting actors and the enabling/regulatory environment. Figure 1 presents the general picture in illustrative form.

Figure 1: Actors and relevant functions of tourism



d. Primary actors

Tour operators and tour guides

Around 30 tour operators are registered throughout Kosovo; the largest number of them operates in Prishtina and Peja. In addition to the basic itineraries, which are promoted on their websites, local tour operators, being relatively small, have the luxury of being flexible in determining the itineraries according to the interests and time available to visitors. As for the tourist guides, the state authorities do not have a register of them since the certification is not carried out by the institutions, but they are mainly offered within the framework of international projects in the country. The number of certified tourist guides is estimated to be approximately 60. In 2018, tourist guides, in order to promote the tourism of Kosovo through professional guides, founded their own membership organization,

GUIDEKS, which is also the representative of Kosovo in the European Federation of the Associations of Tourist Guides of Europe (FEG).

Transportation

Road transport

Kosovo has a road network consisting of 630 km of main roads. In addition, there are two highways: Prishtina - Hani i Elezit, which connects Kosovo with North Macedonia; and Prishtina-Morina, which connects Kosovo with Albania. There are bus lines between the cities. In Prishtina and in some major cities there is also urban transport.

Air transport

The International Airport "Adem Jashari" is the only functional airport in Kosovo and is located at a distance of 15 kilometers from the Municipality of Prishtina. This airport offers flights to the most important European centers and beyond. However, with the development of highways, a good opportunity has been created for access to Skopje Airport or Kukes Airport.

Rail transport

Kosovo has a railway system of 330 km. Due to poor infrastructure and other problems, only two lines are currently in circulation: the Prishtina-Hani i Elezit line, which operates once a day, and the Prishtina-Peja line, which operates twice a day. Both lines are for passenger transport only. Works for rehabilitating the Prishtina-Hani i Elezit line are underway, while in the near future it is expected that the Fushe Kosove-Mitrovica line, and later also the Mitrovica-Leshak and the Fushe Kosove-Podujevo-Merdare lines, will be added.

Accommodation

The register of accommodation capacities in the territory of Kosovo contains 490 units, which are functional and carry out hotel activities in the country. Of these, 47% are hotels, 36% motels, while the rest are other accommodation units. The total capacity of these accommodation units is 7,368 and 11,572 beds. The regions that dominate with the most accommodation units are Prishtina (160), Peja (92) and Prizren (84). The rate of utilization in accommodation capacities, according to the KAS, is around 12-15%, except for the last period where, due to the pandemic, this rate dropped significantly. Data from the PPSE annual survey, on the other hand, show a significantly higher utilization rate, around 55-60%, on average. The difference in statistics is because the latter, with their methodology, also take informality as a basis. In 2019, around 3,563 workers were employed in accommodation units (and accompanying services).

Attractions

Cultural-historical attractions

Cultural heritage is a very important factor for almost every tourism flow in the country. Kosovo, having a sensational history, has managed to inherit a large number of cultural-historical assets. Based on data from MCYS, in Kosovo there are currently 1,567 cultural heritage assets under temporary protection in archaeology, architecture and spiritual heritage. Among the most visited cultural attractions are the National Museum, the Ethnographic Museum, the Mosque of Sinan Pasha, the Monastery of Decan, the Patriarchate of Peja, the Mausoleum of Sultan Murat, the Church of Saint Premta (Levisha), the Cathedral of Mother Theresa, the Church of "Our Lady", Prizren Castle, Ulpiana, Novoberda Castle, Gazi Mehmet Pasha's Hammam and Dukagjin Towers.

Natural attractions

In addition to cultural-historical attractions, Kosovo is also rich in attractive natural attractions: mountains, rivers, lakes, waterfalls and caves. Due to the great potential of nature, where mountains make up about 63%¹⁴ of its territory, today Kosovo is known in international markets for its natural attractions and nature activities. The mountains of Sharr, then the region of Brezovica in particular, Bjeshket e Nemuna, including the region of Rugova, the mountains of Decan and Junik, then Mokne Mountain, constitute some of the mountains of Kosovo that are known as tourist attractions. Within the mountains, there are several attractive peaks for climbing such as: Gjeravica, Luboten, Bistra, Oshllak, Guri i Kuq, Vrtop, etc. Drini i Bardhë, Mirusha Waterfalls, Kuqishta Lake, Badovci Lake, Radoniq Lake, Batllava Lake, Nerodime Bifurcation and the caves such as Gadime, Radavc and Kusar are some of the most popular attractions in the country.

Artificial attractions

There are also some new tourism products that are created or man-made either in nature or indoors. Such attractions created in nature are Zip Line, Via Ferrata trails, Metal Bridges - Tibetan, etc.

Festivals

There are a total of 30 local and international festivals, mainly in the field of music and film, which are traditionally organized in Kosovo and attract visitors from all over Europe. The most popular festivals in the country are the short film festival in Prizren Dokufest; international music festival in Prishtina "Sunny Hill Festival, and the international animation festival in Peja Anibar. Other festivals, such as PriFilm Fest, Beer Fest, Chopin Piano Fest Pristina, are smaller festivals and mainly generate interest from local visitors.

Mediterranean games

Kosovo for the first time in 2030 will be the host of the Mediterranean Olympic Games where the image of the state of Kosovo will be raised in the international arena, the state identity will be strengthened, therefore to organize this event we need to invest in increasing accommodation capacities, sports fields, supporting infrastructure, digitalization, improvement of human capacities as well as promotion of the potential of our country.

Sports and artistic achievements

The athletes from Kosovo were at the right level of their performance leading the lists of world competitions, highlighting sports such as judo, boxing, karate, football, wrestling, bodybuilding and fitness, athletics, skiing, handball, kickboxing, bowling, etc.

Singers of Kosovar origin have recently been ranked in the first places of the world charts and have won various important awards, such as: Dua Lipa, Rita Ora, Rame Lahaj, etc.

Gastronomy

According to the KBRA, there are about 17,053 active businesses in the field of gastronomy in Kosovo. Of all these businesses, about 36% are registered in the category "Restaurants and mobile food service

¹⁴https://en.wikipedia.org/wiki/Relievi_i_Kosov%C3%ABs

activities" and 35% in "Beverage service activities". Prishtina with 27%, accompanied by Prizren with 11% and Ferizaj with 7% are the municipalities with the most registered gastronomy businesses. It should be emphasized that a large number of them, although appearing in the register, are not necessarily active. A large percentage, despite closing and dissolving their activity, do not notify the KBRA about the change. On the other hand, the data from TripAdvisor contains about 714 restaurants (including those with accommodation). Of interest to many types of visitors is the coffee tradition, which is rooted in Kosovar culture.

Supporting institutions

There are a number of supporting institutions, namely associations and donors that contribute to the development of tourism in Kosovo. Among the most important are:

- **The Tourism Union in Kosovo** consists of representatives of hotels, tour operators and tourist agencies. The main goal of this union is the strengthening and development of the tourism sector, the hotel sector and especially the strengthening of tourist agencies.
- **The Chamber of Hospitality and Tourism of Kosovo** has been newly established by tourism shareholders with the aim of strengthening cooperation between local, central and regional institutions, to identify ways and steps to create a favorable environment for the widest possible inclusion of hotel and tourist businesses.
- **GUIDEKS** is an association of professional tourist guides. The mission of this association is the promotion of Kosovo through certified tourist guides as well as the promotion and protection of the tourist guide profession.
- **The Foundation Cultural Heritage without Borders (CHwB)** is a Swedish non-governmental organization with a branch in Prishtina, which promotes cultural heritage as a right in itself, but at the same time as an asset.

b. Main institutions

Based on the institutional arrangement, the main body for the drafting of policies in the field of tourism is the Department of Tourism within the Ministry responsible for Tourism. Another important institution charged with promoting the tourism sector is the relevant Agency for the promotion of tourism. Besides the ministry responsible for tourism, other institutions related to tourism are the ministry responsible for culture, youth and sports, the ministry responsible for economy and environment, the ministry responsible for agriculture and forestry, the ministry responsible for local development, the ministry responsible for education, as well as the relevant directorates at the municipal level.

c. Relevant laws and regulations

Name of the legal document	Description
Law No. 08/L-074 on Tourism	This law regulates the principles and responsibilities of the parties for the organization, operation and provision of tourist services in compliance with the standards of services in the field of tourism.
Bylaws deriving from the Law on Tourism: ADMINISTRATIVE INSTRUCTION (MIET) NO. 05/2023 ON THE CONDITIONS, CRITERIA AND OBLIGATIONS OF EXERCISING THE ACTIVITY OF TRAVEL AGENCIES ADMINISTRATIVE INSTRUCTION (MIET) NO. 06/2023 ON THE CONDITIONS, CRITERIA AND PROCEDURES OF THE REGISTRATION AND EXERCISE OF THE ACTIVITY OF TOURIST GUIDE ADMINISTRATIVE INSTRUCTION (MIET) NO. 04/2023 ON TOURISM REGISTRY AI ON CATEGORIZATION AND CLASSIFICATION OF ACCOMMODATION STRUCTURES AI ON DETERMINING THE CRITERIA OF PRIORITY AREAS /FOR TOURISM DEVELOPMENT	This Administrative Instruction regulates the conditions, criteria and obligations for exercising the activity of travel agencies; procedures for issuing permit for the exercising the activity of travel organizing agency, and intermediary agencies that offer for sale travel packages of external organizing agencies that do not have a registered office in Kosovo, including the form, criteria, application procedures, administrative fee, establishment of the commission for the review of requests and the complaints committee; and liability insurance coverage of travel agencies for their services. This Administrative Instruction regulates the conditions and criteria for exercising the activity of a tourist guide, the procedures for the application and registration of a tourist guide in the tourism register, the procedures for equipping with an identification card and its revocation. This Administrative Instruction regulates the content, management and process of recording data in the tourism register. The tourism register has an informative and promotional character, through the provision of official information for the entities that exercise activity in the field of tourism, as well as data on tourist resources and destinations in the Republic of Kosovo. With this U.A. the criteria, conditions, deadlines and administrative tax for the classification of accommodation structures are determined. Each category of accommodation structures is classified with a separate system, accompanied by the corresponding distinguishing marks according to the definition. This AI defines the criteria for determining a priority area for tourism development. This act identifies tourism resources in the Republic of Kosovo,

AI ON DUTIES AND RESPONSIBILITIES OF THE TOURISM COUNCIL	priority areas for tourism development, plan of priority areas for tourism development, etc
AI ON CONDITIONS FOR PROVIDING SERVICES IN RURAL TOURISM, AGRITOURISM, AQUACULTURE, FISHING, FORESTRY AND SIMILAR FIELDS	This AI defines the composition, duties and responsibilities of the Tourism Council, where the role of the council is to establish dialogue between public institutions and economic operators that exercise activity in the field of tourism through counseling and exchange of information. This Administrative Instruction defines the conditions for providing services in rural tourism, agritourism, aquaculture, fishing, forestry and similar fields. The provisions of this AI apply to service providers in rural tourism, agrotourism, aquaculture, fishing, forestry and similar fields, as well as to the Ministry and institutions that are responsible in the field of tourism.
AI ON VEHICLE RENTAL SERVICES	This AI defines the conditions and criteria for car rental service providers. The provisions of this Administrative Instruction apply to commercial companies engaged in the activity of providing rental vehicle (rent-a-car) services.

The following laws also have a direct or indirect impact on tourism:

- Law No. 05/L-130 on Services
- Law No. 04/L-121 on Consumer Protection
- Law No. 02/L-88 on Cultural Heritage
- Law No. 03/L-181 on Market Inspectorate And Inspective Supervision
- Law No. 04/L-179 on Road Transport
- Law No. 03/L-051 on Civil Aviation
- Law No. 04/L-060 on Waste
- Law No. 03/L-039 on Special Protected Areas
- Law No. 04/L-066 on Historic Center of Prizren
- Law No. 04/L-62 on the Village of Hoçë e Madhe
- Law No. 04/L-196 on the Village of Zym i Hasit
- Law No. 04/L-087 on National Park "Sharr"
- Law No. 04/L-086 on National Park "Bjeshkët e Nemuna"
- Law No. 08/L-072 on Agriculture and Rural Development

9. Vision and mission

Vision

By 2030, Kosovo will become a sustainable tourist destination and a competitor in the Western Balkans.

Mission

Staying tourism will be one of the main principles in the development trajectory of this sector. Flows that enter within the framework of natural and cultural tourism will have the main attention, without excluding other flows that develop as a result of internal dynamics and global trends. During this period, tourism will become one of the key sectors of sustainable economic development in the country.

10. Objectives and actions

The Tourism Strategy has five strategic objectives. Each of the strategic objectives also contains specific objectives. Objectives are associated with impact and result indicators in order to measure their implementation. In this section, the actions are also listed, although they are dealt with in detail in the action plan.

STRATEGIC OBJECTIVE 1: Increase promotional activities and improve information flow

This objective will primarily affect the increase in the number of visitors. Through the increase in the number of tourism promotion activities in the country and abroad in the targeted international markets and the branding of Kosovo as a tourist destination, as well as the improvement of access to tourist information about Kosovo, this will affect the improvement of the image of Kosovo internationally. As a result, we expect to have an increase in the number of international visitors and an increase in the number of hostels. This objective will be achieved with the help of the following three specific objectives:

- ***Specific objective 1.1: Promotion of the touristic image of Kosovo in the international arena***
The promotion of the tourist image of Kosovo in the targeted international markets will be conducted through the development and promotion of the brand of Kosovo as a tourist destination. The government will use international platforms to promote Kosovo.
- ***Specific objective 1.2: Use of digital methods in providing information and improving the quality of tourist information***
This objective will be achieved by enabling tourism actors to use international digital platforms in function of their services, by updating the data on tourist and cultural potentials on open platforms on the Internet, through the digitization of attractions and the advancement of the tourism web portal. It is also intended to formalize the basic narratives for the main attractions.
- ***Specific objective 1.3: Raising cooperation between tourism actors***
To achieve this objective, activities will be organized between the public and private sectors, as well as communications between travel organizers and accommodation service providers. The reorganization of the Tourism Council will play a role in the coordination between the owners as well as the establishment of dialogue between the private and public sectors.

❖ **STRATEGIC OBJECTIVE 2: Create and upgrade quality and sustainable infrastructure for tourism development**

Infrastructure is the basic component for the development of tourism. Tourism infrastructure includes a large number of services, which are necessary to meet the needs of tourists and to increase satisfaction during their stay at the destination. Easy access and necessary information to tourist destinations will influence the attraction of visitors.

Interventions in the physical and touristic infrastructure are expected to be carried out in harmony with nature in order to develop sustainable tourism without degrading nature, especially when it comes to protected areas. The developed infrastructure will also serve the providers of tourist services in doing business in this field as well as the local community in increasing their well-being and the opportunity to engage in tourism activities. This objective will be achieved with the help of the following eight specific objectives:

➤ ***Specific objective 2.1 : Revitalization of existing tourist centers***

A feasibility study will be conducted to understand the most profitable and implementable options for the revitalization of existing tourist centers. The findings of this study will be presented to the Government for its implementation.

➤ ***Specific objective 2.2: Attracting investors for the opening of new winter tourism (skiing) centers***

There will be a commitment to attract investors to increase the accommodation and recreational capacities of winter tourism and skiing centers. A clear indication of the need to increase these capacities is the overpopulation of the existing ski centers in Kosovo.

➤ ***Specific objective 2.3: Increasing accommodation capacities and improving their infrastructure***

This objective will be achieved through the attraction of capital investments, especially in the increase of hotel capacities with affordable prices “budget hotels”. The increase in their accommodation capacity would encourage the increase in the number of stays of some strategic flows of visitors in Kosovo. In addition, the Government will support businesses in mountainous areas to expand their capacities as well as the creation of supporting infrastructure, in the re-destination of traditional houses and towers to serve as accommodation structures. The physical infrastructure in the tourist areas is intended to be regulated through the establishment of inter-institutional cooperation and interaction.

➤ ***Specific objective 2.4: Improving tourist access***

This objective will be achieved through the rehabilitation of roads to mountain destinations and ski centers as well as the development of cable transport where it is identified as a need. Improving access will increase the number of visitors to these areas.

Improvement of walking and cycling paths in rural, urban and inter-urban areas. It is also intended to improve public transport for access to tourist destinations.

Improving access to health care in tourist areas.

Access will be particularly facilitated for persons with special needs.

➤ ***Specific objective 2.5: Building the infrastructure for environmental protection***

The activities that will be developed will initially focus on raising the awareness of the citizens of Kosovo about not throwing waste and preserving the environment, especially in tourist areas, also the cooperation with the relevant authorities will influence the better management of waste. The aim is to improve the infrastructure for the treatment, including the recycling of waste and wastewater. Through the categorization of museums, it will be possible to adapt to modern standards of efficient energy. Other tourist facilities will also be subsidized in the use of equipment that generates energy from efficient and nature-friendly sources.

➤ ***Specific objective 2.6: Identification and development of trails for adventure tourism and alpine skiing***

This objective should be achieved through investments in the creation of new trails as well as the expansion of existing trails in the mountains and hills of Kosovo. There are also plans to mark the existing ski tracks, as well as to identify new ski centers.

➤ ***Specific objective 2.7: Sustainable management of tourist attractions***

The activities that will be implemented include the creation of standardized spaces for economic operators in cultural heritage monuments (including tourist guides, souvenir shops, etc.), as well as the establishment of a system for the maintenance of spaces in attractions.

➤ ***Specific objective 2.8: Improving the safety infrastructure in tourist destinations***

Through the establishment of an information system for the risks in tourist destinations, coordinating the actors for the provision of security services in case of various incidents or accidents with the tourist operators, at the same time, through the new transport law, safety standards will be established of cable cars.

❖ **STRATEGIC OBJECTIVE 3: Expand the tourist offer according to sustainability standards and increase competitiveness**

The tourist offer with products that are competitive in the region and with new products will be achieved by supporting their development, revitalizing the cultural heritage, promoting and developing the cuisine in particular the traditional one, development of dark tourism, as well as support and promotion of organizations such as festivals. This objective will be achieved with the help of the following four specific objectives:

➤ ***Specific objective 3.1: Promoting the development of commercial products according to global trends*** - This objective will be achieved through promoting the development of products in agricultural crops, supporting the development of craft activities in historical cities, and supporting the development of innovative products.

➤ ***Specific objective 3.2: Improving the culinary offer in areas suitable for rural tourism***

The culinary offer will be achieved through the promotion of traditional food products, raising the awareness of food service providers in traditional food as well as its commercialization as well as the adaptation of menus according to the flow of visitors.

➤ ***Specific objective 3.3: Development and promotion of dark tourism***

Dark tourism has to do with the development of the tourist offer in areas associated with wars and tragedies. This objective will be achieved through the training of tour guides on dark tourism and how to approach visitors. Dark tourism will be developed by identifying

attractions and inclusion in dark tourism itineraries as well as through the establishment of museums of the last war in Kosovo.

➤ **Specific objective 3.4: Promotion of night life and the inclusion of festivals in the tourist offer**

The promotion of nightlife will be achieved by creating conditions of access to large cities by expanding the lines of the urban and interurban transport network as well as extending the schedule for certain lines to facilitate travel for nightlife visitors. By providing financial assistance to small festivals to internationalize, as well as sponsoring internationalized local festivals to ensure sustainability will affect their inclusion in the tourist offer.

❖ **STRATEGIC OBJECTIVE 4: Build human capacities for increasing the number of staff in the labor market and improve services**

Through this objective, it is intended to prepare human resources in the field of tourism at all levels of education and in the private sector according to the needs of the labor market. Initially, it is thought to review and improve the education curriculum by including tourism studies subjects starting from early education but also adding tourism studies courses to advanced education. It is then planned to strengthen vocational education by supporting the opening of new schools and the advancement of existing ones. This objective will be achieved with the help of the following two specific objectives:

➤ **Specific objective 4.1 : Advancement of the formal education system in the field of tourism**

Through the creation of an analysis to identify the needs of the labor market in tourism, the harmonization of curricula in secondary schools and higher education institutions that offer courses directly related to tourism and hospitality will influence the advancement of the formal education system in the field of tourism.

➤ **Strategic objective 4.2: Creation of professional training programs dedicated to the tourism sector**

This objective will be achieved by updating school and university materials in the field of tourism as well as the accreditation of programs for short professional courses related to services in the tourism sector as well as the provision of systematic training in deficit areas of tourism.

❖ **STRATEGIC OBJECTIVE 5: Advance the regulatory framework and tourism policies**

Through this objective, it is intended to further improve the legal framework by aligning it with European practices and standards as well as creating a more suitable environment for the development of tourism for all actors. It is also intended to improve the system of statistical data in the field of tourism in order to improve policymaking based on evidence. This objective will be achieved with the help of the following two specific objectives:

Specific objective 5.1: Improving the legal framework and tourism policies with a focus on sustainability

The new law on tourism as well as bylaws will enable the regulation of the field of activity of travel service providers, tourist guides, accommodation and other tourist services. Through the revision of policies in the visa regime for Kosovo, the aim is to facilitate access to Kosovo according to the flow of visitors.

Specific objective 5.2: Creation of a standardized infrastructure for the collection and presentation of data in the field of tourism.

The improvement of tourist statistics will be achieved through the identification of indicators and alignment with international organizations. This objective is intended to be achieved by creating a standard statistical framework for the left of the impact of tourism on the economy.

10. Monitoring and reporting

The leading institution for coordinating the implementation of the strategy is the Ministry of Industry, Entrepreneurship and Trade (MIET), namely the Department of Tourism. On an annual basis, this department will prepare the progress report on the achievement of the strategy's objectives and the implementation of the action plan. This report will provide information on the level of implementation of the strategy against their objectives and indicators. Attention will be paid to the analysis of obstacles, challenges and risks related to the implementation of the strategy.

Participating institutions will be obliged to provide their inputs during the compilation of the report. An important part of this report will be the analysis of obstacles, challenges and risks.

The strategy will undergo an interim evaluation in 2024 to assess the effectiveness and efficiency of implementation, while the final evaluation will take place in 2026. Both evaluations will be independent, and MIET will seek external support for preparing them.

12. Budget

This part presents the data related to the implementation of the Tourism Strategy for the period covered by the Action Plan 2024-2026. The interim review of the Tourism Strategy 2030 should include the cost of actions for the period in question.

General assessment

The Budget Impact Assessment (BIA) of the Tourism Strategy is based on the calculation of the cost of implementing the 2024-2026 Action Plan of the Tourism Strategy 2030.

For the costing of the strategy, the "bottom-up" approach was used and the products defined in the action plan were of particular importance to calculate the implementation cost.

Strategic Objectives of the Tourism Strategy:

Cost 2024-2026:

- Strategic Objective 1 - **Increase promotional activities and improve information flow** - 2,020,100.
- Strategic Objective 2 - **Create and upgrade quality and sustainable infrastructure for tourism development** - 194,045,076.
- Strategic Objective 3 - **Expand the tourist offer according to sustainability standards and increase competitiveness** - 11,507,000.
- Strategic Objective 4 - **Build human capacities for increasing the number of staff in the labor market and improve services** - 430,000.
- Strategic Objective 5 - **Advance the regulatory framework and tourism policies** - 159,400.

The data above show that **Create and upgrade quality and sustainable infrastructure for tourism development** is the strategic objective with the highest cost, or expressed differently, 93% of the total

cost, which follows from the strategic objective **Expand the tourist offer according to sustainability standards and increase competitiveness** by 5.5%.

The strategic objectives are broken down into 19 specific objectives as follows:

1	Promotion of the touristic image of Kosovo in the international arena	1,149,400
2	Use of digital methods in providing information and improving the quality of tourist information	718,700
3	Raising cooperation between tourism actors	152,000
4	Revitalization of existing Tourist Centers.	100,150,000
5	Attracting investors for the opening of new winter tourism (skiing) centers.	110,000
6	Increasing accommodation capacities and improving their infrastructure.	5,803,356
7	Improving tourist access.	82,461,836
8	Building the infrastructure for environmental protection.	266,000
9	Identification and development of trails for adventure tourism and alpine skiing.	1,216,600
10	Sustainable management of tourist attractions.	3,734,500
11	Improving the safety infrastructure in tourist destinations.	302,784
12	Promoting the development of commercial products according to global trends.	2,946,000
13	Improving the culinary offer in areas suitable for rural tourism.	6,475,000
14	Development and promotion of dark tourism.	1,022,000
15	Promotion of night life and inclusion of festivals in the tourist offer.	1,064,000
16	Advancement of the formal education system in the field of tourism.	100,000

17	Development of vocational education and training programs dedicated to the tourism sector.	330,000
18	Improving the legal framework and tourism policies with a focus on sustainability.	82,500
19	Creation of a standardized infrastructure for data collection and presentation in the field of tourism.	76,900
	Total	208,161,576

The specific objective **Relativization of existing tourist centers** has the highest budget cost with EUR 100,150,000 or 48% of the overall budget, followed by the specific objective **Improving tourist access** with EUR 82,461,836 or 39% of the overall budget, **Improving the culinary offer in areas suitable for rural tourism** with EUR 6,475,000 or 3%, and other specific objectives with a lower percentage.