Internal and External Factors
to Export Success in Kosovo

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  (Revenue operations, South West Borders);
- Kosovo Chamber of Commerce;
- PESTOVA Company, specifically Mr. Bedri Kosumi;
- FLUIDI Company;
- UKAJ & ELNOR Company;
- NewCo Feronickeli Company
- Colleagues and friends

I would like to appreciate my family who inspired and encouraged me on every trial on a way, who gave me spiritual and moral support.
1. ABSTRACT

In Kosovo today there are problems which hinder export and economic development. This research offers analyses and shows the impact of the internal and external factors to export success.

Export barriers have been classified into internal factors, all those associated with the company and business approach, with internal company resources and capacity. While external factors are associated with government institutions and economic climate or environment (such: procedures and administration, policies, economic facilities and so forth).

Research includes concrete case studies with private companies in the field of: agriculture, food and drinks, wood processing, mining (raw minerals), and relevant government institutions. It covers most crucial factors to export success such: export legislation and policies, export facilitation, administration and customs procedures, transportation, capacity of production, quality of products and others.

Several internal and external export barriers are identified and possible solutions are recommended. Analyses show that most critical barriers to export success in Kosovo are:

- Non implementation of Central European Free Trade Agreement, CEFTA (including blockade of Serbia and Bona and Herzegovina),
- Absence of export development policy and support strategy; and
- Transport.
2. BACKGROUND CONTENT

Export in Kosovo has been increased since 2001 to now days, but still Kosovo is heavily dependent on imports. Referring to statistics of the Ministry of Trade and Industry of Kosovo (“Trade Policy of Kosovo” 2009, page 6) in 2008 imports reached the figure of almost 2 billion Euro, whereas the export just below 200 million Euro. The same source tells about the structure of Export in Kosovo where: export is dominated by scrap metal and mineral products (for period 2001-2008, an average, about 60% of export), by machinery and equipment (an average of 13%), and by food products and drinks (an average 12%). The Ministry of Economy and Finance (“Semi – Annual Macroeconomic Bulletin” 2009) shows that in 2009 metals remains the highest category of export with the highest value, followed by mineral products (on values of € 9.2 million) and food sector which had an increase in participation comparing with 2008 (but remains equal in the value € 7.8 million).

Kosovo Government priority still remains the economic growth, and at the same times a challenge to society. Improved exports in Kosovo are fundamental for economic growth but it has been very poor performance to date. Increase of exports from Kosovo is essential for economic development and have direct impact to GDP growth (Figure 2.1 Export of goods and services / GDP) but requires attention and concrete actions beforehand.

![Figure 2.1 Export of goods and services /GDP (January-June 2009)](source: Central Bank of Kosovo, BOP Bulletin)
The awareness for change and reform of existing legislation and policies of export in Kosovo exists, but there is lack of concrete actions towards the improvements of export in Kosovo. The absence of the export development policy and supporting strategy from the government institutions hinders export development and has direct impact at business community, specifically exporting companies. In this regards, institutional functionality remains a big concern and hampers the export leaving Kosovo to be far from the (region) world market opportunities.

Export barriers are different and have huge and direct impact to exporting companies, to export development and growth. For significant advances in export development and growth more integrated approach needs to be taken to the measurements, immediate actions from exporting companies and government institutions. Besides, exporting companies must improve and further develop the capacity of production and export department. A better economic climate and facilities for exporting companies should be enabled.

The government institutions should become more efficient and ensure regular energy supply to industries. This would change significantly the capacity of production of industries, on process of production, on time and money (occasionally, also on new investments). The transport infrastructure (especially the road infrastructure) is considered as a critical barrier to export success. The domestic transporters don’t have Long Term Green Card Insurance thus exporters are obliged to use transporters from abroad. Government institutions should explore opportunities and solve transport issues (research is needed beforehand). An alternative to consider would be to become member of Transport Internationaux Routiers (TIR), of international transit system or others.

Kosovo with its open economy and being a member country of the Central European Free Trade Agreement, CEFTA (CEFTA agreement was signed under UNMIK1244 in 2006, and was ratified by SRSG in 2007), has shown limited economic development over the past years. The blockade from Serbia and Bosnia and Herzegovina towards Kosovo (exporters and products) is minimizing benefits of CEFTA. To some extent CEFTA guarantees that other countries would not destroy Kosovo market by dumping their products, but didn’t create competitive
environment for Kosovo even in the region. Thereby, CEFTA is not serving to envisaged purposes and it is not functional at practical level. The government institutions should address all related problems with non implementation of CEFTA officially at high political levels. Concurrently, they should address with CEFTA member countries and discuss possible solutions. CEFTA has direct impact on export development and success in Kosovo, thus immediate actions should be taken. The European and CEFTA member countries are main absorbers of Kosovo export.(Table 2.1 Main trade partners, and Table 2.2 Exports from Kosovo).

Figure 2.2 Main Trade Partners (in %)

![Figure 2.2 Main Trade Partners](image)

Source: Statistical Office of Kosovo, 2009

Figure 2.3 Exports from Kosovo (in %)

![Figure 2.3 Exports from Kosovo](image)

Source: Kosovo Customs
Referring to statistics of the The Ministry of Economy and Finance (“Semi – Annual Macroeconomic Bulletin” 2009) export to European Countries has dropped from € 53.7 million in 2008, to € 26.9 million in 2009. This decline comes from the decline of export to Belgium (export of nickel from NewCo Feronickeli Company), to Germany and Slovenia. The fall of metal prices and of demand of minerals is a major course of the downturn in export. The same source tells that a decrease of € 8 million has been marked in the export of CEFTA countries mainly as a result from the decrease of export to Serbia and Bosnia and Herzegovina, in the value of € 4.4 and € 3.3 million respectively. Whereas for the first time export to Albania have reached a value of € 10.8 million, and represent 17.4% of total exports. Access to foreign market and level of Foreign Direct Investments has not been satisfactory. More effort and concrete action should be taken in order to improve economic facilities and explore export business possibilities abroad. In addition, better access to credit facilities should be enabled.

3. METHODOLOGY

3.1 Research design
The purpose of the research is (through analyses) to identify and show the impact of the internal factors of the companies and the impact of the external factors, basically of government (in) actions on export success in Kosovo.

The research considers four case studies in exporting companies in the following fields: minerals, food and drinks, agriculture and wood processing. Fields are chosen based on the percentage of overall export structure in Kosovo, and companies chosen are active exporters considered of huge potential to export growth. In addition, study considers main government institutions that have impact to export development in Kosovo such: the Ministry of Economy and Finance (Department of Macroeconomics and Fiscal policy unit), Ministry of Trade and Industry (Investment Promotion Agency of Kosovo), Kosovo Customs and Kosovo Chamber of Commerce.
The research is based on qualitative data and includes a separate questionnaire for export companies (Appendix 1), and for government institutions (Appendix 2). Questionnaires are designed to address most crucial internal and external barriers from private sector perspective, and government perspective. Moreover, several interviews are held in order to better understand what hinders export success and better address export barriers discussions.

3.2 Sample characteristics and data analyses

The study includes most relevant government institutions to export and economic development and exporting companies on the following fields: food and drinks, agriculture, wood processing and mining. Companies participated are established at least 5 years ago, committed to export and responded to this study at senior managerial level. Whereas the government institutions are existing at least 10 years ago but responded at the same managerial level. (Table. 3.2.1. Profile and Characteristics of Company Cases; Table 3.2.2. Profile and Characteristics of Government Institutions).

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Industry</th>
<th>Company Age</th>
<th>Respondent Position</th>
<th>Respondent Education</th>
<th>Respondent Experience</th>
<th>Type of information obtained</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.C 01</td>
<td>Food and drinks</td>
<td>&gt; 10 years</td>
<td>President</td>
<td>Economist</td>
<td>&gt;20 years</td>
<td>Questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Financial Manager</td>
<td>Economist</td>
<td>&gt;10 years</td>
<td>Interview</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Online information</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Observation notes</td>
</tr>
<tr>
<td>E.C 02</td>
<td>Agriculture</td>
<td>&gt; 5 years</td>
<td>General Manager</td>
<td>Management</td>
<td>&gt; 10 years</td>
<td>Questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Accountant</td>
<td>Economist</td>
<td>&gt; 3 years</td>
<td>Interview (Phone)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Online information</td>
</tr>
<tr>
<td>E.C 03</td>
<td>Minerals</td>
<td>&gt; 5 years</td>
<td>Manager</td>
<td>Economist</td>
<td>&gt;20 years</td>
<td>Questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Financial Manager</td>
<td>Economist</td>
<td>&gt;10 years</td>
<td>Online information</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Observation notes</td>
</tr>
<tr>
<td>E.C 04</td>
<td>Wood processing</td>
<td>&gt; 5 years</td>
<td>Export Manager</td>
<td>Economist</td>
<td>&gt; 5 years</td>
<td>Questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Financial Manager</td>
<td>Economist</td>
<td>&lt; 10 years</td>
<td>Interview</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Online information</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Observation notes</td>
</tr>
</tbody>
</table>
Table 3.2.2 Profile and Characteristics of Government Institutions

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Institutions</th>
<th>Department</th>
<th>Age</th>
<th>Position</th>
<th>Education</th>
<th>Experience</th>
<th>Type of information obtained</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.G 10</td>
<td>Ministry of Economy and Finance</td>
<td>Macroeconomics</td>
<td>&gt; 10 years</td>
<td>Head of department</td>
<td>Economist</td>
<td>&gt;20 years</td>
<td>Questionnaire x 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fiscal Policy Unit</td>
<td></td>
<td>Fiscal policy advisor</td>
<td>Economist</td>
<td>&gt;10 years</td>
<td>Interview</td>
</tr>
<tr>
<td>E.G 11</td>
<td>Ministry of Trade and Industry</td>
<td>IPAK</td>
<td>&gt; 10 years</td>
<td>Export expert &amp; advisor</td>
<td>Economist</td>
<td>&gt;20 years</td>
<td>Questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Senior investment,</td>
<td></td>
<td></td>
<td>Economist</td>
<td>&gt;10 years</td>
<td>Interview</td>
</tr>
<tr>
<td></td>
<td></td>
<td>promotion officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Online information</td>
</tr>
<tr>
<td>E.G 12</td>
<td>Kosovo Customs</td>
<td>Revenue operations</td>
<td>&gt; 10 years</td>
<td>Head of department</td>
<td>Economist</td>
<td>&gt;10 years</td>
<td>Questionnaire</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South West Borders</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Interview</td>
</tr>
<tr>
<td>E.G 13</td>
<td>Kosovo Chamber of Commerce</td>
<td>Management</td>
<td>&gt; 30 years</td>
<td>Secretary General</td>
<td>Economist</td>
<td>&gt;6 years</td>
<td>Questionnaire</td>
</tr>
</tbody>
</table>

Respondent’s assessment (bases on questionnaires and interviews) of companies and government institutions was used to identify internal and external barriers to export success in Kosovo. Analyses were conducted to also identify export variables and factors of company specific characteristics such: export strategy and policy, export department and marketing, countries of export and products. The results of analyses are shown in the chapter 4. In addition, topic discussion on export barriers and recommendations are shown in the last chapter (chapter 5).
4 RESULTS

4.1 Barriers to export success in Kosovo

Export success is affected by export barriers, hence it is crucial to identify and analyse export barriers in order to prevent or overcome them. Export barriers have been classified into internal and external factors. Internal factors are considered all factors associated with the company business approach, with internal resources and capacities of company. External barriers are associated with all external factors of government institutions and economic climate (such procedures and administration, economic facilities and others). The impact of the internal and external barriers usually varies among different sectors, companies, institutions; hence it is crucial to involve (if not all) most relevant key players that have impact on export development and success in Kosovo.

4.2 Internal Export Barriers by Companies

The study considers four case studies in exporting companies in the following fields: food and drinks, agriculture, wood processing and mining. Analyses show that companies differs among each other from their annual turnover, percentage of export sales, exporting experience and age, ownership, products of export and countries of export (Table 4.2.1 Characteristics of export sales of company). Study cases shows that annual turnover of the company not necessarily influences export sales directly, neither the number of products (produced or exported) or company size (number of employees). There are number of functional internal (and external) indicators associated to inefficiencies of functions of company (such: human resources, production capacity, product quality and standardization, export department, policy and strategy, technology, price, export expertise, marketing, management and finance) that determine export development and success of the company. Study data shows that participating companies (besides NewCo Feronickeli) do not have export department or they lack export development strategy and policy. They are lacking of professional resources and advice on the sector they belong, on legal and economic issues, and export and access to foreign market. They are limited on resources that have expertise to export and foreign market, to international promotion of their companies and products.
Analyses show that senior management often is taking decisions related to export without having any analytical study, or research to foreign market. This makes difficult to identify business opportunities to foreign market and is a risk of the company at the same time. These internal indicators are playing critical role in selecting, entering and expanding into foreign markets, hence it is crucial to conduct all relevant information for each of them to senior management for any decision making beforehand.

Table 4.2.1 Characteristics of export sales of companies

<table>
<thead>
<tr>
<th>Company</th>
<th>Industry &amp; Business</th>
<th>Ownership</th>
<th>Annual Turnover in €</th>
<th>Percentage of export sales</th>
<th>Products of export</th>
<th>Countries of export</th>
</tr>
</thead>
<tbody>
<tr>
<td>PESTOVA</td>
<td>Agriculture</td>
<td>Foreign</td>
<td>2009: &gt; 3.5 Million</td>
<td>&gt; 30%</td>
<td>Potatoes</td>
<td>Albania</td>
</tr>
<tr>
<td></td>
<td>Manufacturing</td>
<td>Partnership</td>
<td>2008: &gt; 2.5 Million</td>
<td>&gt; 35%</td>
<td>Chips</td>
<td>Macedonia</td>
</tr>
<tr>
<td></td>
<td>Trading</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Greece</td>
</tr>
<tr>
<td>FLUIDI</td>
<td>Food &amp; drinks</td>
<td>No Foreign</td>
<td>2009: &gt; 5 Million</td>
<td>&gt; 11%</td>
<td>RC Cola 2 l</td>
<td>Albania</td>
</tr>
<tr>
<td></td>
<td>Manufacturing</td>
<td>Partnership</td>
<td>2008: &gt; 4.5 Million</td>
<td>&gt; 13%</td>
<td>Red Rain 0.25 l</td>
<td>Macedonia</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Jaffa Champion</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Preshevo</td>
</tr>
<tr>
<td>UKAJ &amp; ELNOR</td>
<td>Wood processing</td>
<td>No Foreign</td>
<td>2009: &gt; 1 Million</td>
<td>&gt; 7%</td>
<td>Chairs</td>
<td>Albania</td>
</tr>
<tr>
<td></td>
<td>Manufacturing</td>
<td>Partnership</td>
<td>2008: &gt; 1 Million</td>
<td>&gt; 4%</td>
<td>Tables</td>
<td>Macedonia</td>
</tr>
<tr>
<td></td>
<td>Trading</td>
<td></td>
<td></td>
<td></td>
<td>Recliner sofa</td>
<td>Germany</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Finland</td>
</tr>
<tr>
<td>NewCo</td>
<td>Minerals</td>
<td>Foreign</td>
<td>2009: &gt; 95 Million USD</td>
<td>&gt; 100%</td>
<td>F. Ingots</td>
<td>Italy, Germany</td>
</tr>
<tr>
<td>FERONICKELI</td>
<td>Manufacturing</td>
<td>Partnership</td>
<td>2008: &gt; 100 Million USD</td>
<td>&gt; 100%</td>
<td></td>
<td>Belgium, China</td>
</tr>
<tr>
<td></td>
<td>Production</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>India, Sweden</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>S. Korea, Spain</td>
</tr>
</tbody>
</table>

The study shows interesting characteristics of companies participated, the strength competitive advantages towards domestic competitors and competitors in destination countries as follow: quality of product, technology and standardisation, price and geographical position. (Table 4.2.2 Common competitive advantages of companies).
Table 4.2.2 Common competitive advantages of four companies

<table>
<thead>
<tr>
<th>Competitive advantages (toward domestic competitors and those in destination countries)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Quality of Product/s</td>
</tr>
<tr>
<td>2. Technology and standardization</td>
</tr>
<tr>
<td>3. Price</td>
</tr>
<tr>
<td>4. Geographical position</td>
</tr>
</tbody>
</table>

The study shows that a company can be on a different export development stage due to its actions, business approach and opportunities, but still is dependent on most crucial internal factors to export which are common and apply for all. Companies have identified and show current internal export indicators to export success in Kosovo the following: transport, lack of foreign market assistance and expertise, absence and / or lack of export department, standardization and quality of products, international marketing and promotion and economic facilities and climate. (Table 4.2.3 Ranking of Internal export barriers by Companies).

Table 4.2.3 Ranking of Internal Export Barriers by Companies

<table>
<thead>
<tr>
<th>Ranking by priority</th>
<th>Internal export barriers by companies</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Transport</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>Lack of foreign market assistance and expertise</td>
<td>90</td>
</tr>
<tr>
<td>3</td>
<td>Absence /lack of export development department</td>
<td>85</td>
</tr>
<tr>
<td>4</td>
<td>Standardization and quality of products</td>
<td>80</td>
</tr>
<tr>
<td>5</td>
<td>International marketing and promotion</td>
<td>70</td>
</tr>
<tr>
<td>6</td>
<td>Economic climate (facilities)</td>
<td>60</td>
</tr>
</tbody>
</table>

Transport is ranked as main internal export barrier by companies; even thought companies emphasize and consider transport as external barrier too. Transport remains main barrier for exporting companies because domestic trucks ( or other transport vehicles) don’t have Long
Term Green Card Insurance. This creates lots of obstacles and increases transportation costs, it takes much efforts and time to company. Another internal barrier is considered the lack of foreign market assistance and expertise, which influences company and export growth. This makes difficult to take concrete actions towards foreign market. Most of companies lack one of the following: export department, strategy or policy. This why often companies actions are not strategic and serving to their export development and grow. Standardization, technology and quality of products it is another barrier of companies to further improve. Participating companies are applying international standards and their products are certified by relevant institutions and agencies. , but there is still a space for better technology to invest (as this would reduce costs, time and efforts, and further improve their branding). The existing economic climate, as last barrier listed, creates difficulties and is inadequate to access various financial opportunities (unfavourable loans, unsatisfactory of foreign direct investment and so forth).

4.3 Internal Export Barriers by Government Institutions

The study considers main government institutions which have impact to economic and export development in Kosovo such: the Ministry of Economy and Finance (Department of Macroeconomics and Fiscal policy unit), Ministry of Trade and Industry (Investment Promotion Agency of Kosovo), Kosovo Customs and Kosovo Chamber of Commerce. These institutions are mainly responsible for the : development of economic policies, fiscal policies, export policy and strategy, export tax-procedures and administration, export promotion and other export facilities.

Awareness for further export development by government institutions exist, but often they proved to (in) act or take measures to late, to show willingness for support but to show limited results. The study shows that institutions participated have clear export goal and plan to achieve results. The Ministry of Economy and Finance for this year aims export of around 200 Million. Its plan to achieve planned results is through: export tax free, investments in the infrastructure in road and energy (which is expected to improve business environment and export capacities), and tax policy (.which is among most favourable policies in the region and is expected to positively contribute to the existing level of FDI). Part of this ministry, the Fiscal Policy Unit aims to increase exports through acceptable free market economic tools (through anti dumping policies when possible.).
The Ministry of Trade and Industry has a crucial role to economic development and export. They offer various services to business community and trying to improve as much as possible export in Kosovo. The aim of the Investment Promotion Agency of Kosovo, IPAK, under this ministry remains promotion of domestic companies and products to foreign market, and to attract possible investors. The IPAK is planning to achieve results through various international activities, and at the same time to support business community with advice to foreign market access. The Ministry of Trade and Industry is about to complete the export development strategy and it is expected to be in power within this year. (draft is not public yet). Customs of Kosovo aims to further improve the quality of the services and speed up export procedures. In a long term, they are considering the establishment of export regional offices. To achieve such results, Customs of Kosovo has a concrete implementation plan and analyses on resources, department and procedures. While, Kosovo Chamber of Commerce aims to increase the competitiveness of Kosovo companies to foreign market through their concrete plan of activities.

The study shows that government institutions are meeting with business community few times per year, some of them on regular bases and others occasionally. They show that business community concerns are treated seriously and included into their planning. Concrete examples of such case would be: the latest tax reform which considered almost all suggestions and concerns raised by business community, address through Kosovo Chamber of Commerce at the Ministry of Economy and Finance; the draft of the tax reform which, prior to its approval, has been consulted with all representatives of business community active in Kosovo and so forth.

The government institutions are ranking internal barriers to export success on different order, comparing with ranking of companies. The ranking of internal export of barrier for the is as follow: standardisation and quality of products, economic climate, limited capacity of production, lack of foreign market assistance and expertise and international marketing and promotion.( Table 4.3.1 Ranking of Internal Export Barriers by Government Institutions). The ranking of
Table 4.3.1 Ranking of Internal Export Barriers by Government Institutions

<table>
<thead>
<tr>
<th>Ranking by priority</th>
<th>Internal export barriers by government institutions</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Standardization and quality of product</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>Economic climate</td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>Limited capacity of production</td>
<td>85</td>
</tr>
<tr>
<td>4</td>
<td>Lack of foreign market assistance and expertise</td>
<td>80</td>
</tr>
<tr>
<td>5</td>
<td>International marketing and promotion</td>
<td>75</td>
</tr>
</tbody>
</table>

4.4 External Export Barriers by Companies

The study show that the existing policies related to export (such as VAT) are supporting export to some extent, but there is more scope to improve and to simplify export procedures. Companies have clear export procedures in Kosovo, in destination countries and other (transit) countries, but from time to time they have minor difficulties. They consider the export procedures and administration at Kosovo Customs very effective.

Most important external export barriers to export success identified by companies are: CEFTA (including blockade of Serbia and Bosnia and Herzegovina), transport, absence of development export policy and support strategy, poor institutional promotion of local companies, and economic climate and facilities. (Table 4.4.1 External Export Barrier by Companies).

Non implementation of CEFTA hinders development of companies and export and is considered as main external barriers. Besides unequal treatment of Kosovo among CEFTA members, the blockade from Serbia, Bosnia and Herzegovina for Kosovo goods damaged export and created lots of difficulties (especially on transport). Transport as another external barrier requires attentions on non recognition of domestic documentations of trucks abroad and on improvement of infrastructure. In addition, the absence of export development policy and strategy does not
support export and economic development. Companies find it difficult to invest and this is not attractive for investors too. The institutional promotion is lacking but is core to internationalisation of export of Kosovo. While access to various international funds and other economic facilities (such: energy supply and guarantee, space and so forth) it is not satisfactory and government support is necessary.

Table 4.4.1 Ranking of External Export Barriers by Companies

<table>
<thead>
<tr>
<th>Ranking by priority</th>
<th>External export barriers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CEFTA</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>Serbia, B&amp;H blockade</td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>Transport</td>
<td>90</td>
</tr>
<tr>
<td>4</td>
<td>Absence of export development policy and strategy</td>
<td>80</td>
</tr>
<tr>
<td>5</td>
<td>Poor institutions promotion of local companies</td>
<td>70</td>
</tr>
<tr>
<td>6</td>
<td>Economic climate and facilities</td>
<td>60</td>
</tr>
</tbody>
</table>

4.5 External Export Barriers by Government Institutions

External export barriers by government institutions are considered: non implementation of CEFTA, Serbia, Bosnia and Herzegovina blockade, absence of export policy and strategy, transport, and economic climate and facilities. (Table 4.5.1 External export barriers by government institutions).

Table 4.5.1 Ranking of External Export Barriers by Government Institutions

<table>
<thead>
<tr>
<th>Ranking by priority</th>
<th>External export barriers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CEFTA</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>Serbia, B&amp;H blockade</td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>Absence of export development policy and strategy</td>
<td>85</td>
</tr>
<tr>
<td>4</td>
<td>Transport</td>
<td>70</td>
</tr>
<tr>
<td>5</td>
<td>Economic climate and facilities</td>
<td>50</td>
</tr>
</tbody>
</table>
5 DISCUSSIONS AND RECOMMENDATIONS

5.1 Discussion of results
The results of this study show that export success in Kosovo is dependent on internal and external barriers. It is important for the government institutions and business community to be aware of these export barriers, to join synergies and treat them seriously. The export barriers identified are considered to have huge impact on export development and to have various possible solutions. Hence it is a need for progressive and integrated approach of government institutions and exporters.

5.2 Discussion of Internal Export Barrier Results
The analyses shows that internal export barriers identified are admissible for all participated companies and government institutions, even though they belong to different sectors (food and drinks, agriculture, word processing and mining) and institutions. Respondents have identified the following internal export barriers: transport, lack of foreign market assistance and expertise, absence and/or lack of export development department, standardisation and quality of products, international marketing and promotion, economic climate and facilities, and limited capacity of production. (Table 5.2.1 Recommendations for Internal Export Barriers).

Transport is ranked as main current internal export barrier for exporting companies. Domestic transporters don’t have Long Term Green Card Insurance which creates obstacles to exporters. It creates difficulties to organize transport (often they have to rely on other companies schedules), it increases transportation costs, it takes much efforts and time. Possible solution to transport would be to (A) identify and contract group of local transporters living abroad. This can be achieved by company itself (through research, study visits) or jointly with business community and associations. A research and specific program should be designed, and all contracting transporters would serve to all exporting companies in Kosovo. Another solution (B) for transportation is to sign a long term agreement with foreign trucks, but this is more applicable for exporters that have regular export contract as it costs money. An alternative would be to create proactive exporters network and create active schedule of transport for all. This way expenses would be shared among exporters and transport service would be improved. Lastly, (C) exporters should always try to include transport agreements with foreign contractors, but such
cases are rare. Lack of foreign market assistance and expertise is another internal export barrier. Often exporters are not able to identify possible business opportunities to foreign market and expand. This due to the lack of professional personnel that has also expertise to foreign market. This influences business decision making of company, hence it is crucial to invest and recruit experienced personnel to foreign market access. Absence or lack of export department, policy and strategy is identified as third barrier. Companies became aware that establishment and development of export department is more than necessary and worth investment in a long term. Possible solutions for development of such department is different and vary from company to company, from sector to sector. But, few characteristic for export development department apply for all such: commitment of senior management and personnel, recruitment of professional personnel relevant for that sector and export issues, and recruitment of personnel with export expertise to foreign market. It is important to also apply mechanism to support strategy support and policy. The study shows that participating companies are meeting international recognized standards and are certified by global association. However, they still identify “standardization and quality of products” as internal barrier because they express the need to further improve the technology (so they can reduce costs and time during production process), empower and educate their personnel, invest on material or first substance, improve facilities, apply more advanced regular procedures and measures on quality of products and production process. International promotion should improve by developing proper marketing and promotion plan specifically for foreign markets. Companies should identify possible international events, associations and others to promote themselves and their products. Limited capacity of production is last barrier identified. In order to improve production capacity, among others, company should increase work effectiveness and investment on technology. This will require internal evaluation and assessment of personnel on (vocational) education and experience, work effectiveness beforehand.
<table>
<thead>
<tr>
<th>Table 5.2.1 Recommendations for Internal Export Barriers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal Export Barriers</strong></td>
</tr>
<tr>
<td>By priority</td>
</tr>
<tr>
<td><strong>INTERNAL</strong></td>
</tr>
<tr>
<td>Transport</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Lack of foreign market assistance and expertise</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Absence /lack of export development department (Long term investment)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Standardization and quality of products</td>
</tr>
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<td></td>
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<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>International marketing and promotion</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Economic climate (facilities)</td>
</tr>
<tr>
<td>Limited capacity of production</td>
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<td></td>
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<td></td>
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</tbody>
</table>
5.3. Discussion of External Export Barrier Results

The study shows that main external export Barriers identified from export companies and government institutions are: non implementation of CEFTA. Serbia and Bosnia and Herzegovina blockade, absence of export policy and supporting strategy, transport, poor institutions promotion for local companies, economic facilities and climate. Possible solutions to these barriers are listed on Table 5.3.1 Recommendations for External Export Barriers.

Main external barrier to export success is considered non implementation of Central European Free Trade Agreement, CEFTA. Analyses are suggesting government institutions to take immediate actions and start negotiations at high political level. In addition, government institutions should develop internal scenarios with possible solutions about CEFTA implementation and initiate negotiations among CEFTA members. Government institutions should be committed, initiate and engage discussion about non –functionality of CEFTA among its all members. While doing that concrete plans should be presented among members of CEFTA and concrete measures should be taken by the government. It is recommended to even propose, initiate and change CEFTA agreement if necessary, since CEFTA is not serving the envisaged purposes; hence it is not functional in practice. Serbia, Bosnia and Herzegovina blockade is minimizing benefits of CEFTA and is considered as external barriers. The study shows that government institutions should develop internal policy and take concrete measure towards countries that are blocking domestic products. Beforehand a research on economic impact of such actions should be made, and professional economic expertise should be considered.

Absence of export development policy and strategy is listed as third external export barrier, which again has various possible solutions but requires commitment and concrete actions from government institutions. The absence of export development policy has direct impact on export development. Business community is unsure to what extent they should invest, while limited possible investors doubt on support of certain sector and environment climate for them. Analyses show that it is already too late for development of export policy and support strategy (which currently is drafted by the Ministry of Trade and Industry of Kosovo, but is not yet in public), but such policy it is more than necessary. In addition, concrete action plan for implementation of
export policy should be developed and government institutions should ensure full implementation. Otherwise, impact to export success would be limited.

Another external export barrier is considered transport. Government institutions should not only invest and improve road (transport) infrastructure, but they should also maintain and be more effective in this regard (as this is going slow). Government should also identify all possible transportation opportunities for exporting companies. International membership to transportation agencies and association should be considered and supported. Although various international promotion activities are organised for exporting companies (mainly by Investment Promotion Agency of Kosovo under the Ministry of Trade and Industry), institutional promotion to foreign countries is considered as barrier. There is a need of intensive international promotion plan leaded and organised by or with government institutions, and for follow up and results of such activities. It is suggested to also develop competitive promotion programs for exporting companies.

Economic climate and facilities is ranked as last external barrier to export success. Analyses suggest government institutions to ensure (intermediate) regular power supply to business community and enable better infrastructure and support to most potential companies. In addition, they should create and enable more opportunities to access for foreign direct investments. To most potential companies it is recommended to support and create international partnership through various institutional and international programs (for which programs institutional support is mandatory).
<table>
<thead>
<tr>
<th>External Export Barriers</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXTERNAL</strong></td>
<td></td>
</tr>
<tr>
<td>CEFTA</td>
<td>Initiate discussion and negotiation at all political levels</td>
</tr>
<tr>
<td></td>
<td>Inform and initiate negotiation among CEFTA members</td>
</tr>
<tr>
<td></td>
<td>Develop and present possible solution among CEFTA members</td>
</tr>
<tr>
<td></td>
<td>If necessary, propose and initiate changes to CEFTA agreement due to its functionality</td>
</tr>
<tr>
<td>Serbia, B&amp;H blockade</td>
<td>Develop internal policy and take concrete measures to countries that are blocking domestic products (apply similar or reciprocal measures)</td>
</tr>
<tr>
<td>Absence of export development policy and strategy</td>
<td>Development of export policy and support strategy</td>
</tr>
<tr>
<td></td>
<td>Concrete action plan for implementation of export policy</td>
</tr>
<tr>
<td>Transport</td>
<td>Improve road infrastructure (also other possible transport infrastructure)</td>
</tr>
<tr>
<td></td>
<td>Identify possible international possibilities to transport memberships for export transit countries</td>
</tr>
<tr>
<td>Poor institutions promotion of local companies</td>
<td>Develop intensive international promotion plan</td>
</tr>
<tr>
<td></td>
<td>Follow up from promotion activities</td>
</tr>
<tr>
<td></td>
<td>Develop competitive promotion programs for companies</td>
</tr>
<tr>
<td>Economic climate and facilities</td>
<td>Ensure regular power supply to business community</td>
</tr>
<tr>
<td></td>
<td>Enable better infrastructure to most potential companies</td>
</tr>
<tr>
<td></td>
<td>Create and enable access to FDI</td>
</tr>
<tr>
<td></td>
<td>Initiate and create better business opportunities with foreign Partner through existing international programmes</td>
</tr>
</tbody>
</table>
5.4 Recommendations

The analysis of the study shows that most critical barriers to export success (identified by participating exporting companies and government institutions) are:

- Non implementation of CEFTA;
- Absence of export development policy and strategy; and
- Transport

It is recommended to government institutions to give urgent attention. These barriers have direct impact on export development and success for export Kosovo, hence immediate action by government institutions will have significant benefits.

Recommended action points:

- Correct errors associated with ineffective CEFTA agreement;
- Rapid implementation (is needed) of improved CEFTA agreement;
- Kosovo government to forward to CEFTA plans most beneficial to the country;
- Apply measures towards countries that are blocking products of Kosovo (as Serbia and Bosnia and Herzegovina)
- Apply export policy and support strategy for Kosovo;
- Implementation mechanism to execute the new export policy and strategy;
- Improve transport infrastructure and maintain them with regular maintenance schedule;
- Enable Kosovo transport international membership.

To ensure impact of these recommendations it is essential to do specific research for each topic, before any action is taken.
APPENDIX 1

QUESTIONNAIRE FOR EXPORTERS

The purpose of this questionnaire is to identify and show the impact of internal factors of the enterprises and the impact of Government (in) actions on export success of SME, especially in the field of: agriculture, wood processing and mining.

The ultimate goal of this questionnaire is to engage negotiation among potential exporters and policy makers in finding and taking concrete actions that would have immediate impact on export success in Kosovo.

Structure and Content of the Questionnaire

This questionnaire involved and is divided in two sections:

- Section 1: Exporters;
- Section 2: Government Administration and Policy Makers

Each section provides you with templates to fill in the problems you may be experiencing with exporting your products, obstacles on export procedures and policies and any other obstacles.

Answers will be treated as strictly confidential, and will not be attributed to yourself or your company.

We appreciate for your cooperation and contribution. Thank you.
SECTION 1: Questionnaire for Exporters

1. Basic information of your enterprise:
   Enterprise name: ________________________________
   Founded on: ________________________________
   Respondent job title: ________________________________
   Qualification of the respondent: ________________________________
   Employed in this enterprise since: ________________________________
   Overall year of experience: ________________________________
   URL: ________________________________

2. The primary business is:
   ☑ Manufacturing
   ☑ Trading Company
   ☑ other, please specify: ________________________________

3. What is the extent of foreign ownership of your enterprise:
   ☑ No foreign ownership
   ☑ Foreign partners

4. Your annual turnover:
   For year 2009: __________
   For year 2008: __________
   For year 2007: __________

5. Your enterprise size by number of employees:
   For year 2009: __________
   For year 2008: __________
   For year 2007: __________

6. What percentage of total sales is export sales  --% of your enterprise:
   For year 2009: __________
   For year 2008: __________
   For year 2007: __________

7. Your enterprise exported for the first time in: ________________________________

8. Would you explain how did your enterprise started first time export?
   ☑ Was enterprise initiative and commitment
   ☑ Through international assistance
   ☑ Through government support
   ☑ Other, please specify: ________________________________
9. In which country your enterprise exported its products up to date?

<table>
<thead>
<tr>
<th>Country</th>
<th>% of export</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>

10. Your enterprise currently is exporting because:
- You consider export essential for your company
  (please, explain why__________________________)
- Percentage of total sales export is too high
  (please indicate export sales ______%)
- Other, please specify and explain:_____________________

11. Your export is based on agreement / contract:
- Yes / No ☑
  Please, explain:________________________________________

12. As an exporting enterprise, which of the products did you export and where?

<table>
<thead>
<tr>
<th>Product</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>

13. Are you planning to expand to new market or existing?
- Yes / No ☑
  Please, explain:________________________________________

14. Are there competitors for your export, please list them?

<table>
<thead>
<tr>
<th>Domestic Competitors</th>
<th>Competitors in Country you Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>
15. How would you rank your strength competitive advantages to your competitors in terms of:
- Quality of Products
- Technology and standardization
- Pricing
- Geographical position
- Other, please specify: ____________________________

16. Is your enterprise committed to export?
- Yes / No ☒
  Please, explain: ____________________________

17. Does your enterprise have:
- Exporting Strategy ☒ Yes / No ☒
- Exporting Policy ☒ Yes / No ☒
- Exporting Department ☒ Yes / No ☒

18. Do you have difficulties with customs producers while exporting?
  (Please, explain per country on the table below).

<table>
<thead>
<tr>
<th></th>
<th>Difficulties in Kosovo</th>
<th>Difficulties in Destination Country</th>
<th>Difficulties in other countries (please specify)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

19. Are export policies clear enough in?
  (Please, explain per country on the table below).

<table>
<thead>
<tr>
<th></th>
<th>Kosovo</th>
<th>Destination Country</th>
<th>Other countries (that have impact on your export)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20. Are trade development policies supporting your export?
- Yes / No ☒
  Please, explain: ____________________________
21. Your enterprise if having difficulties in getting clearance and assistance on export from:
   Government Institutions  Yes / No
   Chamber of Commerce    Yes / No
   Customs                  Yes / No

22. Export administration and procedures are changing:
   ☒ Rarely
   ☐ Often
   ☒ Occasionally

23. If regulations and procedures did change during last three years, did they became:
   ☒ More complex for the cases:________________________
   ☐ Less complex for the cases: _______________________
   ☒ No changes in terms of complexity:_______________

24. How is your enterprise informed about these changes:
   ☒ Through relevant government institutions
   ☒ Others, please specify:___________________________

25. Your enterprise main barriers of export are:
   1.__________________________________  3.__________________________________
   2.__________________________________  4.__________________________________

26. Possible solutions for these barriers would be:
   1.__________________________________
   2.__________________________________
   3. __________________________________

27. The existing road infrastructure:
   ☒ Limits your export success
   ☐ Does not have any influence or impact
   ☒ Often creates difficulties and takes time
   ☒ Costs extra efforts, money and time

28. Is your enterprise getting assistance and /or advice for foreign market?
   ☒ Yes / No ☐
   Please, explain why and from whom:__________________________________________

29. Your enterprise is having difficulties in transport?
   ☒ Yes / No ☐
   Please, explain:_____________________________________________________________
30. Your enterprise is having regular inspection from relevant institutions on your products?
   ☐ Yes / No ☐
   Please, explain:_____________________________________________

31. Your enterprise best export practice to share in terms of easy and effective export:
   ____________________________________________________________
   ____________________________________________________________

32. Your enterprise worst export practice to share in terms of uneasy and ineffective export:
   ____________________________________________________________
   ____________________________________________________________

33. Your enterprise have communication and marketing plan and is applying:
   ☐ Yes / No ☐
   Please, explain:_____________________________________________

34. Does your enterprise have legal and/ or economic advice on export issues?
   ☐ Yes / No ☐
   Please, explain why? From whom (government institutions; private; others)
   ____________________________________________________________
   ____________________________________________________________

Your attention please!

If you believe that there is an issue related to export that needs immediate attention and action from policy makers or other relevant factors, please share with us:

-------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------------------------------------------------------------

We would like to remind you that answers will be treated as strictly confidential, and will not be attributed to yourself or your company.

Thank you.
APPENDIX 2

QUESTIONNAIRE FOR GOVERNMENT ADMINISTRATION AND POLICY MAKERS

(Government Institutions)

The purpose of this questionnaire is to identify and show the impact of internal factors of the enterprises and the impact of Government (in) actions on export success of SME, especially in the field of: agriculture, wood processing and mining.

The ultimate goal of this questionnaire is to engage negotiation among potential exporters and policy makers in finding and taking concrete actions that would have immediate impact on export success in Kosovo.

Structure and Content of the Questionnaire

This questionnaire involved and is divided in two sections:

- Section 1: Exporters;
- Section 2: Government Administration and Policy makers
- Each section provides you will templates to fill in the problems you may be experiencing on export daily practices, obstacles on export procedures and policies and any other obstacles.

Answers will be treated as strictly confidential,

and will not be attributed to yourself or your company.

We appreciate for your cooperation and contribution. Thank you.
SECTION 1: Questionnaire for Government Administration and Policy Makers

1. Basic information of your Institution:
   Institution: ____________________________________________
   Department and/or branch: ______________________________
   Place: _________________________________________________
   Founded on: ___________________________________________
   Respondent job title: __________________________________
   Qualification of the respondent: __________________________
   Employed in this institution since: _________________________
   Overall year of experience: ______________________________
   URL: __________________________________________________

2. The institution you are working deals with:
   ✅ Export Policies
   ✅ Export Administration and/or procedures
   ✅ Other export focus, please specify: ______________________

3. Your institution has specific export:
   ✅ Department/branch/office
   ✅ Group of experts/advisors
   ✅ Implementation export unit
   ✅ Other, please specify: _________________________________

4. What is your current institution goal on export:
   __________________________________________________________________________
   __________________________________________________________________________
   Personally, do you agree with this goal? Why (please, explain)
   __________________________________________________________________________
   __________________________________________________________________________

5. Your institution has:
   ✅ Lack of experts on export issues
   ✅ Lack of professional staff and experts on export
   ✅ Necessary human resources on export
   ✅ Large number of employees not relevant to export
   ✅ Others, please specify: _____________________________________________________

6. What was your institution main success on export:
   For year 2009___________________________________________
   For year 2008___________________________________________
   For year 2007___________________________________________
7. What is your institutional goal for export for this year (2010):
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

8. How is your institution planning to achieve that goal (please, explain):
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

9. Your institution consider as main barriers of export:
1. ___________________________ 3. _______________________
2. ___________________________ 4. _______________________

10. Possible solutions for these barriers would be:
1. ___________________________
2. ___________________________
3. ___________________________

11. How often do you consult business community per year:
☒ Once a year
☒ More than once year
☒ Other, please specify: ___________________________

12. How do you reach business community:
☒ Directly, through your developed network
☒ Through Chamber of Commerce
☒ Other, please specify: ___________________________

13. How do you apply business community concerns in your plans, please give an example:
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

14. How do you stimulate business community to export:
☒ Through international promotion
(please, explain how and how often ___________________________)
☒ Policies
(please, specify which policy_______________________________________)
☒ Various infrastructure facilities
(please, specify__________________________________________________)
☒ Other, please specify and explain: ________________________________
15. Do you consider export development crucial to economic development?
☑ Yes / No ☐
Why, please explain:_______________________________________________________________
_______________________________________________________________________________

16. How would you rank the structure of export for three coming years (2010-2013)?
☑ Raw materials (Scrap metals and/or mineral products)
☑ Agriculture
☑ Food products and drinks
☑ Wood processing
☑ Others, please specify:____________________________________________________________

17. Which of the following countries do you see as main absorbs of export on three coming years?
☑ SEE Countries
☑ EU Countries
☑ Others, please specify:____________________________________________________________

18. Is your institution planning concrete actions or measures for these countries?
☑ Yes / No ☐
Why, please explain:_______________________________________________________________

19. The level of Foreign Direct Investments (FDI) for the period 2007-2009 has been:
☑ Satisfactory
☑ Un-satisfactory

20. How would you rank the impact of the factors below on limitation of export success:
☑ Regular power supply
☑ Road infrastructure
☑ Informal economy
☑ Non tariff barriers (such delays etc.)
☑ Other, please
specify:_______________________________________________________________

21. Do you consider that tax policy is sufficient and supporting export?
☑ Yes / No ☐
Please, explain:_______________________________________________________________
_______________________________________________________________________________

22. Do you consider that Kosovo is benefiting from CEFTA?
☑ Yes / No ☐
Please, explain:_______________________________________________________________
_______________________________________________________________________________
23. Are trade development policies supporting export?
   ☐ Yes / No ☐
   Please, explain:______________________________________________
   ____________________________________________________________

24. Customs Administration export procedures are:
   ☐ Effective
   ☐ Ineffective
   ☐ Other, please specify:______________

25. Export administration and procedures are changing:
   ☐ Rarely
   ☐ Often
   ☐ Occasionally

26. If regulations and procedures did change during last three years, did they became:
   ☐ More complex for the cases:______________
   ☐ Less complex for the cases:______________
   ☐ No changes in terms of complexity:______________

27. How do you inform business community for these changes:
   ☐ Through your developed network
   ☐ Chamber of Commerce
   ☐ Others, please specify:___________________________

28. The existing road infrastructure:
   ☐ Limits export success
   ☐ Does not have any influence or impact
   ☐ Often creates difficulties and takes time
   ☐ Costs extra efforts, money and time

29. Do you provide any assistance and / advice to business community for foreign market access:
   ☐ Yes / No ☐
   Please, explain:______________________________________________
   ____________________________________________________________

30. Do you contribute to the quality control of local products?
   ☐ Never
   ☐ Sometime
   ☐ Regularly
   ☐ It is responsibility of another institution, please specify:______________
31. Do you have professional assistance from foreign experts on export issues:

☑ Sometime
☑ Regularly
☐ Other, please specify: ________________________________

32. Do you apply on-line information and communication:

☑ Yes / No ☐

Please, explain: ________________________________

33. Do you consider that relevant export laws and regulations in power are applicable:

☑ Yes / No ☐

Please, explain: ________________________________

34. Do you consider that extra effort should be made to apply / implement certain export regulations?

☑ Yes / No ☐

Please, explain: ________________________________

Your attention please!

If you believe that there is an issue related to export that needs immediate attention and action from policy makers or other relevant factors, please share with us:

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We would like to remind you that answers will be treated as strictly confidential, and will not be attributed to yourself or your company.

Thank you.
List of References

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