

Tourism in Transition, the Post COVID-19 Aftermath in the Western Balkans

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Summary

The purpose of this article is to make a case for a transition in post-COVID-19 Western Balkan (WB) tourism away from 'back to tourism business as it was' recovery thinking. The COVID-19 crisis is unique; unlike other disasters it is global and not local or regional, and it is leading to a global economic recession and increased social inequalities. WB tourism is severely hit by the COVID-19 crisis and the pace of tourism recovery is a question mark. Current uncertainties for WB tourism are discussed, amongst others future tourism behaviour. In view of international developments like the EU economic recovery strategy based on the Green Deal, it is suggested that the present COVID-19 crisis must be used for a transition in tourism, if WB tourism wants to remain relevant for EU tourists in the future. A transition entails building up tourism resilience, which is an obvious reaction, developing policies and practices for sustainable tourism, and building up WB as an integrated destination.

Keywords: Tourism, Western Balkans, COVID-19, Uncertainty

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Introduction

The WTTC (2017) concluded that the global picture of Travel and Tourism's growth forecast of 4% per year for each of the next ten years (on average) masks the fact that the sector faces ever-increasing and unpredictable shocks, from terrorist attacks and political instability, to health pandemics and natural disasters. Each year, new challenges arise to test the resilience of the sector at more local levels. Looking back, this conclusion of WTTC was largely correct. One point however was wrong, namely the use of the phrase 'at local levels.' In their deliberations about critical issues for the future of travel and tourism, WTTC, like the rest of the tourism sector and in fact almost the whole world, could not imagine a global health pandemic with far-reaching consequences. COVID-19 has had and continues to have major impacts on all economic sectors, and perhaps most acutely on tourism, hospitality, leisure, and the arts.

Travel restrictions came into force in 2020. All kinds of social, cultural, and business events were cancelled, tourist attractions, hotels, and restaurants discontinued their services and even national borders in Europe were closed for 'non-essential visits' to neighbouring countries. Governments in Europe enforced lockdown policies in various manners and heralded that people 'stay at home.' An unprecedented tourism situation emerged: from a forecasted good 2020 season, to an almost lost season and rather bleak prospects for the years thereafter (Gössling et al., 2020).

This paper examines the question of post-COVID-19 tourism in the Western Balkan (WB) region. Tourism is one of the sectors severely hit by the pandemic (OECD, 2020) in the WB. It is an important economic sector in WB, as Table 1 shows. The figures of three major neighbouring tourism destinations are presented as well below.

Table 1. Tourism figures (overnight stay)

Countries	No. inbound (million)	Ratio Inbound / population	% GDP tourism	% arrivals by land of total arrivals
Albania	5.84	1.86	15.5	82
Bosnia and Herzegovina	1.14	0.10	2.4	64
Montenegro	2.08	3.33	22.2	n.a.
North Macedonia	0.78	0.34	3.1	n.a.
Serbia	1.71	0.24	3.8	n.a.
Croatia	16.64	4.84	19.9	89
Greece	30.12	3.34*	9.9	29
Turkey	45.76	1.52	4.8	21

Note: UNWTO (2020a), checked with WTTC (2020). Due to various statistical issues, the numbers are merely indicative. Data on Kosovo are not available.

**including domestic tourism*

WB tourism has grown far above average European levels during the last decade (OECD, 2018). For Albania and Montenegro tourism is particularly important. Bosnia and Herzegovina, North Macedonia, and Serbia have developed tourism growth strategies. OECD (2018) assessed WB tourism and observed that tourism has been growing rapidly, that WB countries have

drafted tourism strategies, have improved destination and product development and have taken steps to attract more international visitors through branding and the liberalisation of visa arrangements. According to OECD (2018), challenges for the tourism sector include tourism governance, product development, tourism education, the quality of accommodation,

congress and spa facilities, the high seasonality, various 'institutional constraints,' and good destination governance. OECD warns that the cost-based attractiveness of the WB countries as destinations will be hard to sustain. Lehmann and Gronau (2019) examined why tourism in the WB has grown rapidly, despite the imperfections of its tourism products. Their conclusion is that the tourism standards against which practices are measured are getting outdated and that authenticity is apparently more important than formal quality standards. For Albania, Göler (2018) mentions the country as new destination ('Discover AL') as a main opportunity for further growth and concludes that the 'gold rush mentality' hindering sustainability is a main threat. In other WB countries, a comparable 'gold rush' mentality can be observed, with limited respect for their natural and social environments. One of the results is that UNESCO warned cities that they would be put on the list of endangered sites (Balkan Insight, 2017; 2019).

The COVID-19 pandemic appeared in Europe in early 2020. The pandemic is a potential game changer in tourism and travel (cf. Hall et al, 2020; Gössling et al., 2020). EU governments, airlines, consultants, and researchers all expect that the travel and tourism sector is entering a new era – but nobody knows exactly what kind of era that will be. WB governments and tourism businesses may prefer to believe that tourism will go back to normal, as it was, and it is understandable that they would be highly active in trying to recuperate tourism as soon as travel conditions allow. But thinking that 'things will be the same again' appears odd; COVID-19 led to a deep crisis and leaves marks on all facets of the society and economy.

The purpose of this contribution is to discuss the COVID-19 aftermath and to substantiate our claim that a transition for Western Balkan tourism post-COVID-19 is required, in contrast to 'back to tourism business as it was' thinking. This article will briefly discuss the WB tourism situation and its current uncertainties. It is argued that the COVID-19

experience should not be forgotten when the pandemic is more or less under control and that the tourism sector should use the experience of the COVID-19 crisis for preparing a more sustainable, alternative, tourism sector for several reasons. The first reason is to build up tourism resilience, which is obviously required. The second has to do with international policies; the EU decided that the Green Deal will be the instrument for economic recovery and the WB is also part of this policy development (as the recent EU-Western Balkans Zagreb Summit showed)¹. Researchers have already defined sustainability issues as a threat to WB tourism (Göler, 2018; Nientied and Shutina, 2018; Bučar, 2017, Alkier et al, 2015). Thirdly, we must heed the saying: 'never waste a good crisis.'² "The COVID-19 pandemic should lead to a critical reconsideration of the global volume growth model for tourism, for interrelated reasons of risks incurred in global travel as well as the sector's contribution to climate change" (Gössling et al., 2020, p.13). Indeed, the COVID-19 crisis compels us to rethink the future of tourism. In several European destinations rethinking tourism futures has already started. For example, the city of Berlin uses the current situation to redevelop the city centre towards a more walkable and bikeable area (Corona bike lanes, as they are called in Berlin) to reduce crowded public transport and pollution in the city.³ After experiencing an empty city, cities like Barcelona, Prague, and Amsterdam are currently discussing a 'reset' of their tourism.⁴

Before discussing resilience and a possible transition of WB tourism, the specific character of the COVID-19 impact and the current uncertain situation needs to be depicted.

The COVID-19 Situation

Unlike the 2003 SARS outbreak, the ebola crisis, various natural disasters (Filomena and De Coteau, 2020; Del Valle, 2020; WTTC, 2019; Hall et al., 2020; Gössling et al., 2020), or the Arab Spring (Morakabati, 2019), COVID-19 is a global manifestation, not a national or regional one. Even if they could

freely travel, tourists cannot avoid affected regions and go elsewhere like before, since the whole of Europe and the rest of the world has been affected. Furthermore, travel has become more difficult as 96% of all countries have adopted travel bans (UNWTO, 2020b). Because of this global reach, COVID-19 is distinct from any other major occurrence for the tourism sector. After the first COVID-19 wave, many countries eased their travel restrictions, but already in early summer, some restrictions were reintroduced, limiting travel and making travel to holiday destinations uncertain with regards to, for example, an obligatory quarantine. Inbound tourism decreased quite dramatically in WB countries during the spring and summer of 2020. Tourism statistics indicate that the decrease in the number of international tourists during spring 2020 ranged from 80% to over 90%, and during the summer (July) - 40% to 60%. WB citizens also found it difficult to travel abroad because many EU countries imposed restrictive conditions like obligatory quarantine on travellers from WB countries.

COVID-19 is a health catastrophe in all its human suffering both inside and outside of hospitals and it has led to a global economic crisis and social crisis with increasing inequalities. Countries with large tourism sectors in the WB are seriously affected, but countries with smaller tourism sectors will also be affected by the economic recession following the pandemic (OECD, 2020). The World Bank (2020) suggests that growth in the Western Balkans could plummet by about 5.7 percent in 2020, causing a more severe recession than the global financial crisis. It also suggests that in 2021 the economy will bounce back and show a high rate of growth.⁵ A particularly severe recession will affect Montenegro, Albania, and Kosovo. However, World Bank's estimates are based on UNWTO estimates of 30% fewer international tourist arrivals, and this is just a guesstimate. It appeared during the summer that this figure was much higher. Balkan Insight's (2020) report on tourism in Mostar and Medjugorje (Bosnia and Herzegovina) shows empty hotels and streets in the tourism centres, and companies

struggling for survival. It is unavoidable that many tourism entrepreneurs (big and small) lose their business income and many workers in the sector lose their jobs. Wren-Lewis (2020, p.111), who has studied the economic impacts of pandemics, warns that people (tourists) reduce their "social consumption in an effort not to get the disease." Social consumption means that people spend money on doing things that bring people into contact with other people - things like going to the pub, to football matches, or traveling. This implies that the risk of getting COVID-19 is not a matter of one tourism season. As long as there is no effective vaccine health risks will continue, and people may choose to stay at home or select a destination following health and safety protocols closer to home that they can reach by car. This pattern has been witnessed all over Europe.

The impact of COVID-19 on tourism goes beyond health risk considerations and a lost 2020 tourism season; the economic recession will have an impact too. When incomes decrease, spending on holidays and leisure will also decrease. All over Europe, the economic recession that commenced in 2020 has led to higher unemployment and income losses, which will in turn negatively affect international tourism. The difficulty is that tourism is among the first sectors to be hit by the COVID-19 pandemic and probably the last that will fully recover because travel and leisure will be overtaken by the population's need for food, education, and security in a time of economic and social crisis.

The tourism year 2020 is generally considered as a loss, although countries that had modest COVID-19 cases tried hard to attract tourists. Uncertainties for this and coming years are high, depending on the duration of the pandemic. Predictions on impacts of the health and economic crisis vary and, as agencies like the European Central Bank (ECB) stress, reliable forecasts cannot be given.⁶ The impact of COVID-19 and its aftermath on WB tourism will depend on a series of factors, marked by uncertainties that can be grouped into three categories:

1) the duration of the crisis (pandemic control, travel restrictions, reactivation of transportation, the nature of the second COVID-19 wave, etc.); 2) which government support policies are implemented (in WB and outside WB), who will be beneficiaries, how effective these policies will be, and; 3) unknown tourist behaviour in the near future, depending on considerations such as: consumers losing or strengthening their appetite for travel, and the role trust will play among aspiring tourists in nations or regions that are tourism destinations. These three categories of external factors are complemented by situational factors of destinations, such as the dependency on tourism, adequate destination governance at various levels, and readiness to adapt to emerging tourism behaviour. Some comments on the three categories follow.

Ad. 1) Duration of the Crisis

In the WB, tourism providers and governments are urged, as soon as travel conditions permit, to restart tourism as the losses for national economic development, employment and businesses are severe. Whether and how fast inbound tourism can be re-established, remains to be seen. At a global level tourism has not been very vulnerable to shocks (Aramberri et al., 2017; Brouder, 2020) and tourism has grown during the last decades, except for the 2008/2009 period of the financial crisis. The COVID-19 pandemic is the first global disaster tourism was heavily exposed to, and it is unknown how the tourism sector will develop after the shock and during the subsequent economic and social stress. Hall et al. (2020) constructed an overview with scenarios of tourism recovery with numerous factors playing a role. Their estimate (p.12) is that

“There will be an uneven recovery as some markets will be aligned with early phases of restarting tourism. An emphasis on saving local restaurants, VFR tourism to reconnect with loved ones, essential business travel, and parks and nature tourism where physical distancing can be accomplished, will be the focus of initial tourism revival.”

This may be correct when looking at Asia, but a critical factor in the European situation is that restarting tourism depends on government permissions reducing travel restrictions. Moreover, WB tourism has a strong focus on sun-sea-sand mass-tourism, and a quick orientation towards nature tourism is not likely. International travel has become more uncertain and more complicated. The experience of summer 2020 has shown that a rapid tourism recovery will be unlikely. The world looks towards a vaccine as a solution, and this remains an uncertainty.

Ad. 2) Government Interventions – ‘Stay Home’

Restarting tourism depends on governmental decisions in various countries. Reopening actions were and will be gradual (EC, 2020c) and permission to organize mass-events like festivals will take time. In EU countries, national governments discourage international travel (EC, 2020c) and prime ministers suggest that their citizens stay close to home. Already in early April 2020, the Spanish government reportedly prepared a plan for a ‘summer without foreign tourism’ (ABC España, 2020) and encouraged Spanish people to enjoy holidays in their own country. Austria, Germany, and the Netherlands followed a similar approach. Croatia, Greece, and Turkey, among others, however, were keen to receive international tourists (Volkskrant, 2020, Guardian, 2020) but also felt forced to pose new restrictions on inbound tourism when COVID-19 numbers increased again during the summer. Government policies to support tourism in the WB are modest, simply because countries lack the means to give financial assistance to the numerous small- and medium-sized tourism firms (OECD, 2020).

Ad.3) The Uncertainty of Tourism Behaviour

After travel restrictions are removed and airlines and tourism providers re-activate their services, the question of tourism behaviour comes into the light. It is tricky to sensibly forecast what tourists will opt for. During the summer of 2020, the ‘staycation’

(holidays in one's own city, country, or neighbouring country) was popular, but tourist preferences for the coming years are more difficult to predict. Tourism behaviour is still not well understood in the tourism and academic sectors (Cohen et al., 2014). “.. classic models of consumer behaviour and traditional marketing frameworks tend to view consumers as rational decision makers. Emergent thinking views the consumer as being more multifaceted – part rational, part emotional” (Ballentyne et al., 2018, p.85). Bigné and Decrop (2019, p.132) describe postmodern tourists thus: “far from taking ‘rational’ decisions and behaving predictably, these consumers stray further and further from traditional models and segmentation frameworks. The past 20 years have seen the arrival of a chameleon tourist who is omnivorous and insatiable.” Tourism behaviour can be considered as a key uncertainty in the COVID-19 aftermath; indeed it is a question of whether and what kind of travel will be a priority after being locked at home or pursuing a staycation, and whether travellers can afford holidays (and if so, whether they will opt for staying in their own country or continent, or make longer trips). Tourists’ decision making is an outcome of many (uncertain) factors, such as: feelings of psychological safety and security; the role of age and family situations in decision making; experiences with COVID-19 in both countries of origin and destination; and how social distancing as an element of ‘the new normal’ is experienced; among other considerations.

Spatially speaking, COVID-19 impacts on tourism may range from changing travel patterns at both a global scale and through micro scale practices. At the global scale is the issue of intercontinental tourism, such as Asian visitors to the WB. Regionally what is at stake is whether the WB will attract European tourists who hesitate to go to destinations in Spain and Italy. At smaller scales, the question arises about whether tourist behaviour can continue in the same manner as before the crisis. Answers to some questions cannot be given as yet: will tourists look for (crowded) beaches or prefer to go to quieter areas? Will popular cities

with high tourist densities, like in Kotor’s old centre in Montenegro (if cruise tourism starts up again (Cheer, 2020)) or around Mostar’s famous bridge in Bosnia and Herzegovina (if packed Italian buses return) still attract many tourists? Or, will visitors search for places with more opportunities for social distancing? UNESCO-heritage sites, museums, churches, castles etc. are spatially fixed and easier to manage for tourism providers than open access attractions like old city centres, monuments, beaches, public squares, and so on. In conclusion, given all the uncertainties, it is extremely difficult to make sensible predictions about post COVID-19 tourist behaviour.

Tourism Resilience and Current Risks in the WB

Pleas for enhancing tourism resilience should be expected. Resilience is about dealing with change and, in the field of tourism, is linked to ecosystems and sustainability. It often refers to how specific models of social-ecological systems respond to disturbances (Lew, et al., 2017; Butler, 2018), or how tourism can adapt to social, political, and economic change (Cheer and Lew, 2018). The Rockefeller Foundation (2020) defines urban resilience as “The capacity of individuals, communities, institutions, businesses and systems within a city to survive, adapt and thrive no matter what kinds of chronic stresses or acute shocks they encounter.” This broad description can easily be adapted to tourism destinations. Resilience is important but needs a careful contextualization and issues like power relations among actors need to be taken into account (Butler, 2018, Berbés-Blázquez and Scott, 2018). Aramberri et al. (2017, p.147) discuss the research literature on tourism vulnerability and conclude that the ‘true’ vulnerability lies at the level of the destination, and that “a destination that is more vulnerable is, in fact, one that is less resilient to transformations/declines in its tourism sector.”

With regards to resilience, the WTTC (2019) issued a white paper on crisis readiness, responses to diseases, natural

disasters, political turmoil, and terrorism and security-related events. It discusses preparedness to mitigate the impact of crises, effective management to address the crisis, and responsiveness to ensure a speedy recovery. WTTC's final point is to 'rebuild stronger and better' as the crisis may provide an opportunity to rebuild more robust, sustainable, and efficient (social and physical) infrastructure, and enable a destination to rethink its product offering and its target audience. "In effect, disasters may disrupt previous political and financial roadblocks, ultimately becoming a catalyst to change the tourism product, benefiting both citizens as well as tourists. Ultimately, the goal for destinations should be to bounce ahead post-crisis by designing and building a more resilient system" (pp.21-22). Whether destinations can develop adequate resilience and crisis readiness to withstand the shocks of an occurrence like COVID-19 is to be doubted, as it is a global phenomenon affecting all destinations. Yet, destinations with lower tourism dependency, well-functioning governance systems that can handle bad times, and a tourism disaster management system that can anticipate on expected shocks will recover and renew sooner.

The main risks for crises and severe stressors can be summarized as follows (cf. WTTC, 2017; WTTC, 2019; Filimonau and De Coteau, 2020) as they connect to WB tourism.

- *Health and safety*, like a protracted COVID-19 period, or a new virus, or a wave of immigrants from the Middle East attempting to travel to EU.
- *International economy*: tourism destinations that depend on tourism are obviously more vulnerable. Next to dependency, the seasonality of tourism and narrow focus in Albania and Montenegro on not less sustainable sun-sea-sand tourism play a role. The economic recession could become a stressor for WB tourism.
- *Ecology*: climate change and environmental disasters are gradual, longer-

term developments though impacts can be acute. Extreme weather conditions can cause floods or forest fires and affect tourism (Filimonau and De Coteau, 2020). For the Regional Cooperation Council (RCC), Vuković and Vujadinović Mandić (2018) prepared a study with an important analysis of regional high-risk changes, where potential natural disasters constitute a major contributor.

- *Internal risks and regional issues in WB* are often overlooked. "Political uncertainty, credit conditions, and macroeconomic stability are other key domestic risk concerns, as well as weather shocks, which affect both agriculture and energy production, both of which are vital to the economies of the region" writes the World Bank (2019, p.30) about the WB. The World Bank (ibid.) stressed (before COVID-19) that slower global economic development in the Europe and Central Asia region are risks for the WB economies. But economic realities have changed very rapidly. At the WB level, unresolved conflicts might be exacerbated by the present crisis (looking for an 'enemy' outside to detract attention from national problems is a worldwide political practice) and may impact the willingness of WB governments to collaborate on tourism. Political uncertainties and leadership issues might trigger new regional tensions. During the last decade, politicians in the WB have shown that regional collaboration at the level of the six WB countries⁷ is arduous, hampering the positioning of the WB as an attractive tourist destination.

WB Tourism Transformation

As discussed, the near future of tourism is uncertain. Tourism behaviour is certainly influenced by the risks mentioned above, but many more factors play a role in tourist decision making. During the summer of 2020, Kosovo's citizens continued going to the Albanian coast and Serbian citizens

to the Montenegrin coast – since they could travel by car over a short distance. In addition, we can expect the diaspora to keep coming back to their homeland for family visits and personal business. They may, however, come less frequently, depending on the economic recession. Tourism growth is unlikely for the coming years as inbound tourism from the EU and, to a lesser extent, from the Far East and the Middle East regions is a question mark. If the WB region will ‘keep on doing what it did, it will get what it got,’ but will ‘get less of it’ for some time to come.

Tourism researchers Hall et al. (2020), Gössling et al. (2020, p.15), Jones and Comfort (2020), Ioannides and Gyimóthy (2020) and Brouder (2020), among others, highlight the transformative possibilities of the COVID-19 pandemic for tourism and its sustainability, and stress that with the magnitude of the COVID-19 pandemic, there is an urgent need not to return to business-as-usual when the crisis is over. COVID-19 can be seen as opportunity to consider a transformation of the global tourism system that is more aligned with the SDGs (Sustainable Development Goals). Hall et al. (2020, p.8; see also Brouder, 2020) also warn: “COVID-19 may provide an impetus for individuals to transform their travel behaviours, however the transformation of the tourism system is extremely difficult.” Politicians and businesses will insist that the tourism sector should be opened up as soon as possible to facilitate returning to ‘normal.’ Indeed, sustainable tourism has been advocated for in the past, but did not result in major changes globally speaking (McCool et al., 2015). WB tourism has grown despite the imperfections of its tourism products (Lehmann and Gronau, 2019) and the threats on sustainability (Göler; 2018; Balkania / Balkan Forum, 2017; Ciro, 2019; Nientied et al., 2017; Nientied and Shutina, 2018). But 2020 witnessed a crisis that changes mindsets. The WB should change its tourism sector if tourism wants to grow after the recovery. A ‘back to business as it was’ mentality will lead to a loss of tourism in the long run because it is not 1) green, 2) WB-wide, and 3) resilient.

Green. Many international institutions opt for sustainability, SDGs, greening the economy, etc., as a strategy for economic recovery; for ‘getting out of this COVID-19 crisis better.’ Business leaders, the banking sector (Hepburn et al., 2020; Allen et al., 2020) and academia share this mindset. The EU President has stressed the role of the European Green Deal in the economic recovery⁸ and the EC (2020a) communication ‘Tourism and transport in 2020 and beyond’ states that beyond the immediate steps to bring relief, the “shared ambition should be to maintain Europe as the world’s leading tourist destination in terms of value, quality, sustainability and innovation,” and that “At the core of this new ambition is sustainability, contributing to both the European Green Deal and strong communities” (p.14). The UNWTO (Pololikashvili, 2020, p.17) mentioned as early as April 2020 that “Sustainability is at the heart of our plan for tourism’s post-COVID-19 recovery” and “Now is not the time for ‘business as usual.’ Rather, this is tourism’s time to realize its potential as a major driver of fair, equal and sustainable economic development, and both businesses and governments – as well as individual tourists – have a role to play in delivering this, leaving no one behind.” In its subsequent report (UNWTO, 2020c), it advises reorienting the tourism value chain towards sustainability. The EU uses COVID-19 to implement its agenda for a more ‘green/sustainable’ society, that should be the ‘new normal’ in the EU. The EU-WB summit’s Zagreb Declaration of May 6, 2020⁹ includes the point,

“In this endeavour, a prominent role should be given to the association of the region to the EU’s climate-related ambitions, in line with the Paris Agreement, to promoting the Green Agenda for the Western Balkans, as well as to furthering the digital economy and, strengthening connectivity in all its dimensions: transport, energy, digital and people-to-people, including tourism and culture,”

in line with the EC’s support to the Western Balkans tackling of COVID-19 and the post-pandemic recovery communication earlier (EC, 2020b).

If WB tourism wants to retain its EU-inbound tourism and thinks that tourism growth should primarily come from EU countries, following the EU's green approach would be a wise strategy. The EU's green approach will influence tourism preferences and may well reduce demand for holidays in destinations with old-fashioned 'grey' tourism practices that are not safe and do not respect the environment and community. The WB should also have much more concern for climate change issues as they are increasingly becoming a stress factor for WB tourism and, as indicated, entail serious risks that can occur any time.

WB-wide. A second pillar for a tourism transition can be that WB countries develop a joint WB tourism approach that remains diverse and complementary across countries. WB tourism is fragmented; six small countries are in *competition* rather than in *co-opetition*. Collaboration between tourism sectors in the WB countries is currently limited; ministers express constructive thoughts about tourism collaboration, some tour operators organize bus package tours for tourists and agencies implement small externally funded projects. The Regional Cooperation Council (RCC) implements a €5 million, EU-funded project to support a tourism development and promotion project that creates joint and internationally competitive cultural and adventure tourism offers in the six Western Balkan countries. However, a number of very small grants over a three-year period is insufficient. Projects like the successful trail 'Peaks of the Balkans'¹⁰ do not garner much follow-up by other international projects if no donor funding is available. A joint tourism strategy and a joint WB tourism website will be required. Experience has shown that WB leaders find it difficult to collaborate. The present COVID-19 situation puts greater pressure on WB countries, making it time to explore the benefits of better collaboration in the field of tourism.

Resilient. The core issue in tourism resilience is building systems that can handle shocks and stressors and regain balance (Calgaro et al., 2014). The WTTC (2019) has developed a

report with guidelines for 'disaster readiness,' with useful management information. Resilience is about systems that aim at less disaster management. The WTO's (2020c) approach is broader and refers to the SDGs, mentioning the goal of institutional strengthening and building resilience "To build capacities of decision makers, tourism stakeholders and the local community with a view to adapting to the post COVID-19 reality and to strengthen institutions and multi-stakeholder collaboration mechanisms in the sector for the purpose of mitigating the impact of the crisis and accelerating recovery" (p.20). The following resilience principles are based on the synthesis works of Biggs et al. (2015) and are intended to offer guidance for building resilience in socio-ecological systems. Berbés-Blázquez and Scott (2018) have applied them to general tourism context and below they are refined to the WB context.

a) *Diversity and redundancy.* Diversity in types of attractions, different target groups, etc. is thought to increase the resilience of a socio-economic system. This also holds for WB tourism. For example, the small city of Mostar (Bosnia and Herzegovina) is very dependent on one single attraction, its famous bridge. It has become a mono-functional tourism situation, leading to high vulnerability, crowding, and a short tourism season. Many bus tours (many from Italy) pay a hop-off hop-on visit to Mostar. Tourists visit the bridge and the market with cheap souvenirs, drink a coffee or refreshment and move on. Mostar also sees a lot of day-tourism from Sarajevo, that is used as a base camp by tourists. The level of organization of Mostar's tourism providers is low. There is no easy way out of such monoculture. Economic diversification (or a greater diversity of tourist attractions), extending the tourism season, and keeping tourists for overnight stay looks like an obvious recipe to move forward. However, the city and country do not have the resources and have sought to benefit from tourists without investing in the future of tourism. One step in this direction is to search for

- more diversity in target groups, in the organisation of events, etc. *Redundancy* means that components in a system have overlapping functions and that the system will continue to thrive even if one part of it is negatively impacted by a sudden change. This is easier in cities, where tourism is just one of many functions. In the coastal city of Durrës (Albania), beach tourism is popular, but tourists can also go to the city centre and visit the boulevard and cultural attractions.
- b) *Connectivity* refers to the links between elements of a tourism system. "The very nature of tourism means that it requires networks at a variety of levels, from aviation that facilitates international tourism to local ground transport that allows economic benefits of tourism spending to disburse throughout a destination" (Bebés-Blázquez and Scott, 2018, p.17). Moreover, connectivity also applies to IT, whether connections are smooth, safe, and stable. Road connectivity between the six WB countries is slowed down by border customs, and discussions about easing travel across their territories have not yet led to many results.
- c) *Managing slow variables and feedbacks*. Slow variables give insight into the dynamics of a system. A fast variable for tourism is the ongoing tourism numbers; for example, it is easy to monitor tourism arrivals on a monthly or annual basis and make projections about future growth. Slow variables in a tourism system include the diverse and evolving preferences of tourists, for instance. They are harder to gauge but ultimately shape the number of arrivals over time. Management of slow variables is near absent in WB tourism, as the tourism approach has been based on tourism business development in known segments (beach, cultural assets) and some tourism service development (such as activities in mountain areas, guided tours). The understanding of the many niche markets is quite limited. Managing social media by tourism providers is not much more than plain marketing. There is hardly any tourism intelligence and there is an inadequate understanding of new trends in tourism behaviour. Responses in the WB to trends like sustainable and experience tourism are limited.
- d) *Experimentation and learning*. In line with managing slow variables and feedbacks, experimentation and learning are also quite limited in WB tourism. Tourism providers, sometimes in collaboration with others, do engage in incremental innovation and experimentation. However, at the level of tourism systems, these mechanisms are weak. Tourism industry associations are representing industry interests rather than developing new forms of tourism and innovative offerings. Linkages between the tourist industry and higher education are also weak and tourism destination management teams that could foster learning are absent or limited to marketing and information activities. Research on and learning from EU tourism patterns is limited to the copying of success formulas (especially when investments are small).
- f) *Participation and polycentric governance*. In resilience thinking, the process of bringing together diverse stakeholders - including citizens and experts - leads to overall better decision making. Governance assumes that units act with a certain degree of independence from one another while maintaining linkages both horizontally (e.g. between units working at the municipal level) and vertically (e.g. between units working at municipal, regional, and national levels). Both participation and governance are weakly developed in the WB in general, and in WB tourism in particular. Nientied and Shutina (2018) have discussed the case of Albania, for instance. In Albania, destination management organizations are not functioning well,¹¹ resulting in serious challenges related to a total lack or poor cooperation between various stakeholders. This impedes them from tackling important issues such as:

seasonality and limited development of off-season tourism products; weak tourism infrastructure; inadequate maintenance of facilities; missing databases on local and regional tourism; weak local and regional branding and marketing; and environmental issues that are rarely considered in tourism investment decisions (cf. Risi, 2017). In other WB countries, the situation is comparable.

Improving tourism resilience along the lines of these system components is challenging. Political and power issues play an important role. The WTTC (2019) stresses that destination governance built on trust-based coalitions is a requirement for resilience. Such coalitions are needed for crisis preparedness. In the WB however, citizens as stakeholders are left out of decision making, with rare exceptions (Ciro et al., 2019).

Final remarks

Del Valle (2020) anticipates that the COVID-19 aftermath will enhance the appearance of new tourism consumption habits. He stresses the issue of increased environmental and social awareness, where consumers' concern for sustainability and social issues will continue, reinforcing the importance of environmental and social governance. Del Valle (ibid.) also states that ethics will be as important as aesthetics (beauty of destinations), as consumers will give priority to destinations that respect the environment, low-pollution transport, etc. Del Valle's is one of many informed opinions and, like any prediction, it is difficult to assess whether he will be right. Romagosa (2020, p.693) remarks "In brief, all stakeholders, including us as researchers, have a task of great responsibility: to help redirect tourism - from the point of view of both supply and demand - towards a truly sustainable and resilient profile that is fit for a future that is constantly changing and full of new challenges." Indeed, the point at stake is not being right as an observer or researcher, but also having the role of a practitioner, who pushes future tourism

development in a better direction compared to the 'gold rush' tourism witnessed during the last decade in the WB. Vargas-Sánchez and Moutinho (2018) add to Del Valle's assessment by discussing strategic developments in tourism. They conclude (p.332) that "... the market share approach is dead, and it has been replaced by a different one based on value share," and (p.333) "The key for marketers in tourism firms is to stop talking about themselves and their products, and to start listening to what people are talking about and are passionate about, and sharing and facilitating those passions." Many others advocate for changes in tourism systems and solutions have been formulated (e.g. Woods, 2017), but such developments are slow and depend on tourist preferences (McCool et al., 2015). Sigala (2020) has listed many paradoxes in post COVID-19 tourism and made detailed suggestions for a new tourism research agenda (cf. Zenker and Kock, 2020).

Forward thinking in terms of a tourism transition is not likely to be a top priority for most important stakeholders in WB tourism when managing COVID-19's immediate impacts requires all their attention. Thinking about lessons to be learned from the COVID-19 crisis and reflecting on and preparing for new shocks demands a longer-term perspective and a helicopter view. Current attempts to revive tourism require a shorter-term perspective and action-orientation. In such situations, longer term plans do not align with this perceived urgency. Yet, few people believe that the matter is only recapturing the 2019 number of tourists, especially when the COVID-19 pandemic continues to play an important role and wleads us closer to a 'new normal.' The issue is whether a destination takes into account the fact that tourism demands after a crisis may change along with what a destination can and wants to offer. One task for academics and consultants is to discuss with governments and stakeholders in the tourism sector to further elaborate transition plans with scenario's incorporating sustainability, resilience, and internationalisation.

Notes

1. <https://www.consilium.europa.eu/en/press/press-releases/2020/05/06/zagreb-declaration-6-may-2020/>
2. By Winston Churchill. Rahm Emanuel, senior advisor of former president Obama, shared "You never want a serious crisis to go to waste. And what I mean by that is an opportunity to do things that you think you could not do before." Emanuel is often quoted these days by various commentators who see Covid-19 as grounds for stressing that societies should change in a – what is now believed to be – deglobalizing world.
3. See <https://www.theguardian.com/environment/2020/may/07/world-cannot-return-to-business-as-usual-after-covid-19-say-mayors> for more examples and background.
4. <https://www.washingtonpost.com/travel/2020/05/06/city-is-ours-again-how-pandemic-relieved-amsterdam-overtourism/> and <https://www.politica.lavanguardia.com//20200511/481102356191/diputacion-y-ayuntamiento-impulsan-santa-susanna-como-destino-sostenible.html>
5. Such predictions are hard to make. C. Lagarde mentioned during the ECB Governing Council press conference of April 30, 2020, that the economy of the EU zone would probably shrink by 5% to 12%. Such a margin looks like a better indication of the impact of the economic recession.
6. See https://www.ecb.europa.eu/pub/economic-bulletin/focus/2020/html/ecb.ebbox202003_01~767f86ae95.en.html
7. The non-member states: Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia.
8. See <https://www.youtube.com/watch?v=IR7VJrFb754> for a discussion.
9. <https://www.consilium.europa.eu/en/press/press-releases/2020/05/06/zagreb-declaration-6-may-2020/>
10. <https://akzente.giz.de/de/artikel/neue-zeitrechnung>
11. This is the subject of a Polis University / Co-PLAN tourism study on tourism destination governance (Nientied and Ciro, 2019)

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