

# TOURISM IN TRANSITION, THE POST COVID-19 AFTERMATH IN THE WESTERN BALKANS

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## Abbreviations

<b>ECB</b>	European Central Bank
<b>EC</b>	European Commission
<b>EU</b>	European Union
<b>IT</b>	Information Technology
<b>NYT</b>	New York Times
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>RCC</b>	Regional Co-operation Council
<b>SDG</b>	Sustainable Development Goals
<b>UNWTO</b>	United Nations World Tourism Organization
<b>VFR</b>	Visiting Friends and Relatives
<b>WB</b>	Western Balkans
<b>WTTC</b>	World Travel & Tourism Council

## Abstract

The purpose of this paper is to make a case for a transition of post COVID-19 Western Balkan (WB) tourism, contrary to '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 leads 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.



*Source: Authors.*

## 1. Introduction

“The global picture of Travel & Tourism’s growth forecast of 4% per year for each of the next ten years on average, masks the fact that our 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” (WTTC, 2017). Looking back, this conclusion of WTTC was largely correct. One thing was underestimated, namely: ‘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 such far-reaching consequences. Indeed, COVID-19 has major impacts on all economic sectors, and perhaps most on tourism, hospitality, leisure and arts. Travel restrictions came into force in 2020, all kinds of social, cultural and business events were cancelled, tourist attractions, hotels, restaurants etc. 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. Figures of three major neighbouring tourism destinations are presented as well.

Table 1. 2018 Tourism figures

Countries	No inbound (million)	Ratio Inbound / population	% GDP tourism	% arrivals by land of total arrivals
Albania	5.84	1.86	15.5	82
Bosnia-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

\* incl. domestic tourism

Source: UNWTO (2020a), checked with WTTC (2020). Due to various statistical issues, numbers are merely indications.

WB tourism has grown far above average European levels during the last decade (OECD, 2018). For Albania and Montenegro tourism is particularly important. Bosnia-Herzegovina, North-Macedonia and Serbia have developed tourism growth strategies to benefit from tourism developments. 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 for example 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, and 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) wondered 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 the 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).

In early 2020 the COVID-19 pandemic appeared in Europe. The pandemic can be seen as a potential game changer in tourism and travel (cf. Hall et al, 2020; Gössling et al., 2020). McKinsey (2020) published a blog entitled '*The future is not what it used to be; thoughts on the shape of the next normal*'<sup>1</sup>. EU governments, airlines, consultants and researchers all expect that the travel and tourism sector is entering a new era – but nobody exactly knows what kind of era this 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 will 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 paper is to discuss the COVID-19 aftermath and to substantiate our claim that a transition of Western Balkan tourism for post COVID-19 is required, in contrast to 'back to tourism business as it was' thinking. The paper will discuss briefly the WB tourism situation and the current uncertainties. It is argued that the COVID-19 experience should not be put out of mind 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. First is to build up tourism resilience, which is obvious. Second is international policies; EU decided that the Green Deal will be the instrument for economic recovery, and WB is also part of this policy development as the recent EU-Western Balkans Zagreb Summit showed<sup>2</sup>. Researchers already defined sustainability issues as a threat to WB tourism (Göler, 2018; Nientied and Shutina, 2018; Bučar, 2017, Alkier et al, 2015). Third is the saying 'never waste a good crisis'<sup>3</sup>. "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, 13). Indeed, the COVID-19 crisis compels us to rethink the future of tourism. Rethinking tourism futures is already going on. For example, the city of Berlin (like others, such as Milan)

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1. <https://www.mckinsey.com/featured-insights/leadership/the-future-is-not-what-it-used-to-be-thoughts-on-the-shape-of-the-next-normal>

2. <https://www.consilium.europa.eu/en/press/press-releases/2020/05/06/zagreb-declaration-6-may-2020/>

3. 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 the Covid-19 as a ground for stressing that societies should change in a – what is now believed to be – deglobalizing world.



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.<sup>4</sup> After experiencing an empty city, Barcelona and Amsterdam now discuss a 'reset' of their tourism<sup>5</sup>.

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

## 2. The COVID-19 situation is different

Unlike the 2003 SARS outbreak, or the Ebola crisis, or 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. "We haven't seen a global crisis that's impacted every country globally and every facet of the tourism industry," said Lori Pennington-Gray, the director of the Tourism Crisis Management Initiative (NYT, 15 April 2020). 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, and since travel has become more difficult as 96% of all countries adopted travel bans (UNWTO, 2020b). Because of this global reach, COVID-19 is distinct from any other major occurrence for the tourism sector.

COVID-19 is a health catastrophe - with all its human suffering inside and outside hospitals - that led to a global economic crisis and a social crisis with increasing inequalities. Countries with big tourism sectors in the WB are seriously affected, but countries with smaller tourism sectors will be affected as well by the economic recession following the pandemic (OECD, 2020). World Bank (2020) suggests that growth in the Western Balkans would plummet by about 5.7 percent in 2020, causing a more severe recession than the global financial crisis, and that in 2021 the economy will bounce back and show a high growth percentage.<sup>6</sup> A particularly severe recession will affect Montenegro, Albania, and Kosovo. However, World Bank's estimates are based on UNWTO estimates of minus 30 percent international tourist arrivals, and this is just a guesstimate. It is unavoidable that many small and bigger tourism entrepreneurs lose their business source of income, and many workers in the sector lose their jobs. Wren-Lewis (2020, 111), who studied 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 much money on doing things that bring people into contact with other people - things like going to the pub, to football matches or travel. 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 continue, and people may choose to stay at home or select a trusted hotel following health and safety protocols in a place closer to home that they can reach by car.

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4. 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.

5. <https://www.washingtonpost.com/travel/2020/05/06/city-is-ours-again-how-pandemic-relieved-amsterdam-overtourism/> and <https://www.lavanguardia.com/politica/20200511/481102356191/diputacion-y-ayuntamiento-impulsan-santa-susanna-como-destino-sostenible.html>

6. Such predictions are hard to make. C. Lagarde mentioned during the ECB Governing Council press conference of 30 April, that the economy of the EU zone would probably shrink in 2020 with 5 to 12%. Such margin looks like a better indication of the impact of the economic recession.

The impact of COVID-19 on tourism goes beyond the health risk considerations and a lost 2020 season; the economic recession will play an important role too. When incomes go down, spending on holidays and leisure will go down. All over Europe, the economic recession that commenced in 2020 will lead to higher unemployment and income losses. This will have an as yet unknown negative effect on the volume of 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.

### 3. Current situation

The tourism year 2020 is generally considered as a loss, although countries which had a modest number of COVID-19 cases, try to attract tourists. Also, the WB tourism sector wrote off 2020 (Balkan Insight, 2020). Uncertainties for the 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 ECB stress, reliable forecasts cannot be given.<sup>7</sup> The impact of COVID-19 and its aftermath on WB tourism will depend on a series of factors, marked by uncertainties. Main uncertainties can be grouped in three categories:

1. the duration of the crisis (pandemic control, travel restrictions, reactivation of transportation, whether a second COVID-19 wave will occur);
2. which government support policies are implemented (in WB and outside WB), who will be beneficiaries, how effective these policies will be; and,
3. which tourism behaviour will emerge, whether consumers lose or strengthen their appetite for travel, which role trust among tourists in nations or regions as tourism destination will play and how health and safety are perceived.

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 are submitted.

#### Ad.1 Duration of the crisis

In the WB, tourism providers and governments are likely to try, 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. Albanian minister of Tourism and Environment, Klosi was optimistic about tourism recovery, as "80% of the tourists come from the region by car" (Albania Daily News, 18 April 2020). It looks unlikely that all 80% will come back in the coming period of economic hardship, but the Albanian minister's optimism appears to have some grounds when looking sketchily at the recent history of severely impacted destinations, like Paris and New York after the terrorist attacks, and Turkey and Egypt after the political upheavals. All destinations recovered after a few years. However, these were specific destinations, not affecting the travel appetite of tourism consumers who could opt for alternative destination. At a global level tourism has not

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7. See [https://www.ecb.europa.eu/pub/economic-bulletin/focus/2020/html/ecb.ebbox202003\\_01~767f86ae95.en.html](https://www.ecb.europa.eu/pub/economic-bulletin/focus/2020/html/ecb.ebbox202003_01~767f86ae95.en.html).



been very vulnerable to shocks in certain destinations (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 for tourism, and it is unknown how the tourism sector will develop after the shock in a period with 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." A critical factor in the European situation is that restarting tourism depends on government permissions to reopen borders. Moreover, WB tourism has a strong focus on sun-sea-sand, and is not likely to quickly orient to nature tourism. International travel will be more complicated,<sup>8</sup> including the uncertainty about the costs of air tickets. There is broad agreement that rapid tourism recovery will be unlikely unless a vaccine is developed and made widely available.

## Ad. 2 Government interventions – stay home

Restarting tourism depends on governmental decisions. Reopening actions will be gradual (EC, 2020c) and permission to organize 'mass-events' may take time. In EU countries national governments discourage international travel (EC, 2020c) and prime ministers suggest their citizens to stay close to home. Already early April 2020, the Spanish government was reported to prepare a plan for a 'Summer without foreign tourism' (ABC España, 2020) and encouraging Spanish people to enjoy holidays in their own country. Austria, Germany and the Netherlands are following a similar approach, although borders within EU cannot be kept closed. Croatia, Greece and Turkey, amongst others, however, declared that they will be ready by 1 July to receive international tourists (Volkskrant, 2020; Guardian, 2020). Government policies to support tourism in the WB are modest, simply because the 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 reopening borders, after airlines restart their business, and after tourism providers start their services again, the question of tourism behaviour comes into the light. It is problematic to sensibly forecast what tourists will opt for. Indeed, in both short and longer terms tourism behaviour is a very uncertain factor. 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, 85). Bigné and Decrop (2019, 132) describe postmodern tourists: "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 the biggest uncertainty for the COVID-19 aftermath. Various policies may be formulated and implemented by governments, tour operators may start to get back into business, but the principal question is what tourists will do. It is unknown whether and what kind of travel will be a priority after being locked at home, whether travellers can afford holidays and

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8. See for example [http://www.visitgreece.gr/en/home/about\\_covid\\_19](http://www.visitgreece.gr/en/home/about_covid_19).

if so, will opt for staying in their own country or continent, or make long trips. Tourists' decision making is an outcome of many (uncertain) factors, such as – feelings of psychological safety and security, - whether age and the family situation play a role in decision making; - experience with COVID-19 in both countries of origin and destination, - how social distancing works out as element of 'the new normal' (McKinsey, 2020) is experienced, and so on.

Spatially speaking, COVID-19 impacts on tourism may range from changing travel patterns at global scale to micro scale practices. At the global scale, an issue is about intercontinental tourism such as Asian visitors to the WB. Regionally, an issue is whether the WB will attract European tourists who hesitate to go to destinations in Spain and Italy. At smaller scales, the question arises 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 (Montenegro) - if cruise tourism will start up again (Cheer, 2020) -, or around Mostar's famous bridge (Bosnia Herzegovina) - if Italian packed buses will 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 uncertainties it is extremely difficult to make sensible predictions about post COVID-19 tourist behaviour.

#### 4. Tourism resilience and current risks in WB

It can be expected that there will be pleas for enhancing tourism resilience. Resilience is about dealing with change and in the field of tourism linked to eco-systems 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). 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", and 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, 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".

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 'rebuild stronger and better' because 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" (p. 21-22). Whether destinations can develop adequate resilience and crisis readiness to withstand shocks of an occurrence like COVID-19 is to be doubted, as it is a global phenomenon affecting all destinations. But destinations with lower tourism dependency,

with well-functioning governance systems that can handle bad times and a tourism disaster management system that can anticipate on expected shocks, will sooner recover and renew.

Main risks for crisis and severe stressors can be summarized as follows (cf. WTTC, 2017; WTTC, 2019; Filimonau and De Coteau, 2020), and are connected 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 are dependent on tourism are vulnerable. Next to dependency, also seasonality of tourism and a narrow focus in Albania and Montenegro on not very sustainable sun-sea-sand tourism play a role. The recession could well be a big stressor for WB tourism.
- *Ecology*: climate change and environmental disasters are gradual, longer-term development, but impacts can be acute. Extreme weather conditions can cause floods or big forest fires and affect tourism (Filimonau and De Coteau, 2020). For RCC, Vuković and Vujadinović Mandić (2018) prepared a study with an important regional high-risk changes, from which potential natural disasters can be derived.
- *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 World Bank (2019, 30) about the WB. World Bank (ibid.) stressed (before the COVID-19 period) that the slower global economic development in Europe and the Asian regions are risks for the economies of WB countries. But economic realities have changed very rapidly. At WB level, unresolved conflicts might exacerbate because of the present crisis (looking for an ‘enemy’ outside to detract attention from national problems, is a world wide political practice) and may impact the willingness of WB governments to collaborate on tourism. Political uncertainties and leadership might trigger new regional tensions. During the last decade, politicians in WB have shown that regional collaboration at a WB6 level is arduous, hampering the positioning of WB as attractive tourist destination.

## 5. WB Tourism Transformation

As discussed, the near future of tourism is very uncertain. Tourism behaviour is influenced by above risks, but many more factors play a role in tourist decision making. It is likely that Kosovo citizens will keep on going to the Albanian coast and Serbian citizens will keep on going to the Montenegrin coast. Also, the diaspora will keep on coming back to their homeland for family visits and personal business. It is probable that they will go less frequent, depending on the severity of 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 less of it for some time to come. And the era of cheap flights may come to an end - EU national governments give financial support to airlines but with conditions of for example reducing CO<sub>2</sub>. Among others, tourism researchers Hall et al. (2020), Gössling et al. (2020, 15) and Brouder (2020) stress the transformative possibilities of the COVID-19 pandemic for tourism and its sustainability: “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, rather than an opportunity to reconsider a transformation of the global tourism system more aligned

to the SDGs" [Sustainable Development Goals]. Hall et al. (2020, 8; cf. Brouder, 2020) also give a warning: "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 voice that the tourism sector should be opened up as soon as possible to facilitate returning to "normal". Indeed, in the past sustainable tourism was advocated but did not result in major changes globally speaking (McCool et al., 2015). And so far, 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 changed mindsets. And COVID-19 has changed the external environment for WB tourism. WB should change its tourism sector if tourism wants to grow after the recovery. A 'back to business as it was' will lead to a loss of tourism because it is not 1) green, 2) WB-wide, and 3) resilient.

*Green:* Many international institutions opt for sustainability, SDG's, greening the economy, and comparable vocabulary, as a strategy for a sustainable economic recovery, for 'getting better out of this COVID-19 crisis'. Not only institutions, also business leaders, the banking sector (Hepburn et al., 2020; Allen et al., 2020) and academe. The EU President stressed the role of the European Green Deal in the economic recovery<sup>9</sup> and 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 "At the core of this new ambition is sustainability, contributing to both the European Green Deal and strong communities" (p. 14). UNWTO (Pololikashvili, 2020, 17) mentioned in 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." It its subsequent report (UNWTO, 2020c) advises reorienting the tourism value chain towards sustainability. 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 6 May 2020<sup>10</sup> 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 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 green approach would be a wise. The EU 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 environment and people. 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, entails 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, yet diverse and complementary among countries. WB tourism

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9. See <https://www.youtube.com/watch?v=IR7VJrFb754> for a discussion.

10. <https://www.consilium.europa.eu/en/press/press-releases/2020/05/06/zagreb-declaration-6-may-2020/>

is a fragmented tourism, six small countries are in *competition* rather than in *co-opetition*. Collaboration between tourism sectors in the WB countries now is rather limited; ministers express constructive thoughts about tourism collaboration, some tour operators organize bus package tours for tourists and agencies implement small externally funded projects. Regional Cooperation Council (RCC) implements a €5 million EU funded project to support a tourism development and promotion project to create joint and internationally competitive cultural and adventure tourism offers in the six Western Balkans. However, a number of small grants over a three-year period is very insufficient. Projects like the successful trail 'Peaks of the Balkans'<sup>11</sup> do not get up much follow-up by other projects if no donor funding is available. A joint tourism strategy and a joint WB tourism website will be required. But experience has shown that WB leaders find it difficult to collaborate. The present COVID-19 situation puts high pressure on WB countries, and the benefits of better collaboration in the field of tourism may now be explored.

*Resilient.* The core issue of tourism resilience is building systems that can handle shocks and stressors, and regain balance (Calgaro et al., 2014). WTTC (2019) developed a report with guidelines for 'disaster readiness', with useful management information. Resilience is about systems that aim at less disaster management. WTO's (2020c) approach is broader and refers to the SDG's and mentions as 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 social-ecological systems. Berbés-Blázquez and Scott (2018) applied them to general tourism context, and below they are refined to the WB context.

a) *Diversity and redundancy.* Diversity in e.g. types of attractions, different target groups, etc. are thought to increase resilience of a socio-economic system. This holds for WB tourism. For example, the small city of Mostar (Bosnia-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 more diversity of tourist attraction, extending the tourism season and keeping tourist for overnight stay looks like the obvious simple recipe. However, the city and the country do not have resources and have sought to benefit from tourists without investing in the future. What could be done is search for more diversity in target groups, organise events, etc. *Redundancy*, meaning 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 the 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*, the links between the 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" (Berbés-Blázquez and Scott, 2018, 17). Moreover, connectivity also applies to IT, whether connections are smooth, safe and stable. Road connectivity between

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11. <https://akzente.giz.de/de/artikel/neue-zeitrechnung>



WB6 countries is slowed down by border customs, discussions about easy travel within WB6 have not 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; it is easy to monitor for example tourism arrivals on a monthly or annual basis and make projections about future growth. Slow variables in a tourism system are for example the diverse and evolving preferences of tourists. They are harder to gauge but ultimately shape the number of arrivals over time. Management of slow variables is next to 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 boils down to plain marketing. There is hardly any tourism intelligence, there is inadequate understanding of new trends in tourism behaviour. Responses 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 the 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 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. What can be witnessed is rapid 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 certain 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 and regional and national levels). Both participation and governance are weakly developed in WB in general, and in WB tourism in particular. Nientied and Shutina (2018) discussed the case of Albania. In Albania, destination management organizations are not functioning well,<sup>12</sup> 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 very 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 systems components, is challenging. Political and power issues play an important role. WTTC (2019) stresses that destination governance built on trust-based coalitions is a requirement for resilience. Such coalitions are needed for crisis preparedness. Citizens as stakeholders are left out of decision making, with rare exceptions (Ciro et al., 2019).

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12. This is subject of a Polis University / Co-PLAN tourism study on tourism destination governance (Nientied and Giro, 2019)



## 6. Final remarks

Del Valle (2020) anticipates that the COVID-19 aftermath enhances the appearance of new tourism consumption habits. He stresses the issue of increased environmental and social awareness, where consumer 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 the informed opinions, and like any prediction, it is difficult to assess whether he will be right. The point at stake is not being right as an observer of researcher, but also to take up a role in steering future tourism in a better direction compared to the 'gold rush' tourism witnessed during the last decade in the WB. With his views Del Valle (2020) is among many others. Vargas-Sánchez and Moutinho (2018) discuss strategic developments in tourism and 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 changes in tourism systems and solutions have been formulated (e.g. Woods, 2017), but it can be learned from the long discussion on sustainable tourism preferences and practices of tourism providers (McCool, et al., 2015).

Forward thinking in terms of a tourism transition is not likely to be on top of mind of most important stakeholders in WB tourism when managing COVID-19 immediate impacts needs all attention. Thinking about lessons to be learned from the COVID-19 crisis and reflection on and preparing for new shocks demands a longer-term perspective and a helicopter view. Current attempts to revive tourism are led by a shorter-term perspective and action-orientation. In such situation, longer term plans do not align with felt urgency. Yet, few people believe that the matter is recapturing the 2019 tourism numbers, especially when the COVID-19 problem is not solved quickly. The issue is whether a destination takes into account that tourism demands after a crisis may change and what a tourism destination can and wants to offer. A task for academia and consultancy can be to discuss with governments and with stakeholders in the tourism sector to develop transition plans with scenario's incorporating sustainability, resilience, and internationalisation.

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