



ISCTBL 2020

INTERNATIONAL SCIENTIFIC CONFERENCE

Универзитет „Гоце Делчев“ –
Штип

Goce Delchev University
Shtip

Факултет за туризам и бизнис
логистика

Faculty of Tourism and
Business Logistics

**Трета Меѓународна Научна Конференција
Third International Scientific Conference**

**ПРЕДИЗВИЦИТЕ ВО ТУРИЗМОТ И БИЗНИС
ЛОГИСТИКАТА ВО 21 ВЕК**

**CHALLENGES OF TOURISM AND BUSINESS
LOGISTICS IN THE 21ST CENTURY**

**ЗБОРНИК НА ТРУДОВИ
CONFERENCE PROCEEDINGS**



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13 ноември 2020 г / November 13, 2020

Издавач:

Факултет за туризам и бизнис логистика
Универзитет „Гоце Делчев“ – Штип
Крсте Мисирков, 10-А, 201, 2000, Штип, РС Македонија
Тел: +389 32 550 350
www.ftbl.ugd.edu.mk
www.ugd.edu.mk

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Факултет за туризам и бизнис логистика

Publisher:

Faculty of Tourism and Business Logistics
Goce Delchev University of Shtip
“Krstе Misirkov” no.10-A P.O. Box 201 Shtip 2000, North Macedonia
Tel: +389 32 550 350
www.ftbl.ugd.edu.mk
www.ugd.edu.mk

For the Publisher:

Tatjana Boshkov, Ph.D. – Dean

Conference Organizer:

Faculty of Tourism and Business Logistics

CIP - Каталогизација во публикација
Национална и универзитетска библиотека "Св. Климент Охридски", Скопје

338.48(497.7)(062)

INTERNATIONAL scientific conference Challenges of tourism and business
logistics in the 21st century (3 ; 2020 ; Stip)

Challenges of tourism and business logistics in the 21st century
[Електронски извор] / The 3th international scientific conference,
September 13 th , 2020, Republic of North Macedonia. - Stip : Goce
Delcev University of Stip, Faculty of tourism and business logistics,
2020

Начин на пристапување (URL): <https://e-lib.ugd.edu.mk/zbornici.html>. -
Текст во PDF формат, содржи 435 стр., илустр. - Наслов преземен од
екранот. - Опис на изворот на ден 22.11.2020. - Фусноти кон текстот. -
Библиографија кон трудовите

ISBN 978-608-244-779-7

а) Туризам -- Економски прилики -- Македонија -- Собири

COBISS.MK-ID 52738053

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Prof. Gligor Bishev, University Professor and Chairman of the Board, Sparkasse Bank-Skopje – “*The impact of the pandemic on economic developments*”

Peter Tabak, Executive Director, Leading Regional Economist for Economics, Policy and Governance in the Western Balkans Vice-President for Policy and Partnerships, European Bank for Reconstruction and Development - “*Economic outlook for the Western Balkans during and after the epidemic*”

Milan Zdravkovic, Executive Director of the Distribution System Operator in J.P Srbijagas, Belgrade, Serbia – “*Supply of natural gas in COVID-19 conditions - experience and expectations*”

Prof. Misko Dzidrov, University Professor and Vice-rector for Teaching and Students, Goce Delcev University of Stip – “*UGD in a time of pandemic*”

Prof. Tatjana Boskov, University Professor and Dean of the Faculty of Tourism and Business Logistics, Goce Delcev University of Stip – “*The impact of coronavirus on global growth and global supply chain shifts*”

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I and II session

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УНИВЕРЗИТЕТ „ГОЦЕ ДЕЛЧЕВ“ - ШТИП
GOCE DELCEV UNIVERSITY OF STIP

ФАКУЛТЕТ ЗА ТУРИЗАМ И БИЗНИС ЛОГИСТИКА
FACULTY OF TOURISM AND BUSINESS LOGISTICS

ТРЕТА МЕЃУНАРОДНА НАУЧНА
КОНФЕРЕНЦИЈА

THIRD INTERNATIONAL
SCIENTIFIC CONFERENCE

ПРЕДИЗВИЦИТЕ ВО ТУРИЗМОТ И БИЗНИС
ЛОГИСТИКАТА ВО 21 ВЕК

CHALLENGES OF TOURISM AND BUSINESS LOGISTICS
IN THE 21ST CENTURY

ЗБОРНИК НА ТРУДОВИ
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13 ноември, 2020, Штип / Shtip, November 13th, 2020

ПРЕДГОВОР

Факултетот за туризам и бизнис логистика при Универзитетот „Гоце Делчев“ во Штип, беше организатор на Третата меѓународна научна конференција „Предизвици на туризмот и бизнис логистика во 21 век“. Конференцијата се одржа на 13 ноември 2020 година на платформата Microsoft Teams, со повеќе од 90 учесници од матичната земја и странство. Оваа година Меѓународниот научен комитет брои еминентни професори од нашата земја и над 15 странски земји како Израел, Шпанија, Франција, Молдавија, Италија, Грција, Египет, Полска, Турција, Романија, Бугарија, Србија, Хрватска, Босна и Херцеговина и Словенија.

Целта на оваа конференција е да промовира поголемо разбирање на бизнис администрација, логистиката, туризмот и угостителство во однос на управувањето, економијата, образованието и претприемништвото. Ова подразбира дека фокусот на учесниците го насочивме кон најновите трендови и предизвици во врска со развојот на туризмот, менаџирањето со компаниите, пазарот на труд, можностите за придобивки и профит, изгледите за подобра конкурентност на меѓународниот пазар, што пак е императив за финансиската стабилност на нашата земја во целина.

Имено, со пристигнатите трудови и авторските истражувања се оствари целта на конференцијата - а тоа е оценувањето на тековната состојба и идните изгледи за развој на микро план што се однесува на домашниот пазар, како и движењата на глобалната економија, подготвувајќи ја бизнис заедницата за предизвиците со кои ќе се соочуваат при остварувањето на нивните цели, што де факто влијае врз одржувањето на финансиите особено во времето кое го живееме под притисокот на пандемијата.

Препораките кои се пренесоа се однесуваат како да се зајакнува капацитетот на компаниите како и промените во регулативите кои го диктираат нашиот пат кон ЕУ. Дискусиите во текот на конференцијата беа одговор на тоа како реагираа и се позиционираа менаџерите на финансиски средства во услови на голем пазарен ризик, пазарни шокови и турбуленции и како треба да се подготвуваат инвеститорите во поедини сектори. Трудовите прикажаа изгледи и кон идната интеграција на земјите од Западен Балкан, со осврт на досегашните постигнувања и идните предизвици пред овие економии како и размена на искуства на сите учесници кои сме денес присутни од повеќе земји.

Токму овие препораки треба да бидат двигател на процесите на реформата во насока на подигање на квалитетот на образованието заради поголема продуктивност на трудот, конкурентност на економијата и намалување на неусогласеноста на понудата на вештини и компетенции како и побарувачката на пазарот на труд.

Постигнувањето на овие цели е заедничка задача на сите оние што се во позиција да го дадат својот придонес за имплементација на реформите во општеството. Токму тие реформи, тие промени во начинот на пристап, методологија на работа и организација, не треба да ги правиме само за да станеме дел од економскиот блок, туку да бидат во насока да постигнеме нешто друго, многу позначајно, односно сите напори што ги правиме да бидат за остварување на повисок степен на благосостојбата на нашите граѓани, за создавање на достоинствени услови за живот и работа.

Во регионот, меѓутоа и пошироко, во Европа, искуствата се најразлични. Наидуваме на успешни, и на не толку успешни модели. Токму ваквите научните конференции, дебатите што се развиваат тука, се најдобриот начин за размена на искуства, за идентификација на предизвиците и перспективите, за споредување на моделите и третирањето на нивните недостатоци или предности, меѓутоа и презентирање

на можните нови комбинирани модели. Едукацијата на новите генерации кои ќе бидат подготвени да се соочат со предизвиците што ги носи глобализацијата, е заеднички предизвик на Универзитетите, на бизнис заедницата, но и на централната и локалната власт.

Штип,
13 Ноември 2020

Главен уредник
Проф. д-р Татјана Бошков, *Декан*

PREFACE

The Faculty of Tourism and Business Logistics in Gevgelia, part of the University Goce Delchev from Shtip, hosted the Third International Scientific Conference, "Challenges of Tourism and Business Logistics in the 21st Century". The conference was held on 13th of November 2020 on the platform Microsoft Teams, with more than 90 participants from the country and abroad. This year the International scientific committee included eminent professors from our country and more than 15 from foreign countries, such as Israel, Spain, France, Moldova, Italy, Greece, Egypt, Poland, Turkey, Romania, Bulgaria, Serbia, Croatia, Bosnia and Herzegovina and Slovenia.

The aim of this conference is promoting a greater understanding of the business administration, logistics, tourism and hospitality in terms of management, economics, education and entrepreneurship. In that context, the focus of our participants was on the latest trends and challenges related to tourism development, company management, labour market, opportunities for gain and profit, opportunities for better competitiveness in the international market, which is imperative for the financial stability of our country entirely.

Furthermore, the conference papers and authors' researches fulfilled the aim of the conference, the assessment of the current situation and future prospects for the development of the micro plan in terms of the domestic market, as well as the global economy changes, prepared the business community for the challenges that will they face during their goal achievement, which de facto affects the maintenance of finances especially in the time we live under the pandemic pressure.

The detection of the conditions that have been presented is a real mirror of where we are, where we have been, and what is even more difficult, to answer the question what next? Achieving these goals is a common task of all those who are in a position to contribute to the implementation of reforms in society. Exactly those reforms, those changes in the way of approach, methodology of work and organization, we should not make only to become part of the economic block, but to be in the direction of achieving something else, something much more significant - efforts for achieving a higher degree of well-being of our citizens, for creating dignified living and working conditions.

In the region, but also beyond, in Europe, the experiences are diverse. We come across successful and not so successful models. Exactly such scientific conferences, debates that develop here, are the best way to exchange experiences, to identify challenges and perspectives, to compare models and how to treat their disadvantages or advantages, but also to present possible new combined models. The education of the new generations that will be ready to face the challenges posed by globalization is a common challenge of the Universities, the business community, but also of the central and local government.

Shtip,
November, 13th, 2020

Editor
Tatjana Boshkov, Ph.D. *Dean*

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TOURISM IN COVID-19 PANDEMIC IN NORTH MACEDONIA: EXPERIENCES AND PERSPECTIVES

Goran Kitevski¹; Dejan Iliev²

Abstract

The aim of the paper is to analyze tourism in North Macedonia in Covid-19 pandemic conditions. Due to the restrictive conditions imposed by the Covid-19 crisis; both outbound and inbound tourism in North Macedonia experienced a decline and collapse. Given the role and importance of tourism in the Macedonian economy, a number of interventions and measures to stimulate domestic tourism were proposed and implemented by the government. The main goal of the paper is to analyze the level of success, but also the shortcomings of the proposed and implemented state measures, as well as the main characteristics of the tourist movements in the tourist season realized in crisis in North Macedonia. A variety of methods were used in the research: analysis, synthesis, comparative method, deductive reasoning and others. The results indicate positive and negative experiences, but both are seen as especially important in the formulation of strategies for tourism development in the future.

Keywords: domestic tourism, Covid-19, government measures, tourism development, North Macedonia

JEL Classification: Z32

Introduction

UNWTO Secretary-General, Zurab Pololikashvili, pointed out that tourism needs to thrive, and that the travel restrictions must be eased or lifted in a timely and responsible manner (UNWTO, 2020a). It is obvious that tourism is most affected by the new coronavirus, but a new strategy is needed to continue the fight against the pandemic in a different, organized and coordinated way, without tourism being the most obvious victim as it has been so far. The wide range of NPIs (nonpharmaceutical interventions) undertaken to combat the pandemic have mainly affected tourism, as an activity that essentially implies all human activities versus social distancing. With international air travel rapidly slowing as a result of the crisis, and many countries imposing travel bans, closing borders, or introducing quarantine periods, international and domestic tourism declined precipitously over a period of weeks (Gössling, Scott, & Hall, 2020).

During the twentieth century, tourism has been one of the fastest growing economic sectors in the world (Jóhannesson & Huijbens, 2010). International tourism has proven relatively resilient to global economic downturns, continuing a healthy growth in international arrivals despite retraction in other global sectors (Du, Ng, & Lew 2016). The effects of such events on tourism

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are usually immediate and extreme, although after the interruption, tourism rapidly returns to its long-term pattern of growth (Zeng, Carter, & De Lacy, 2005). Unlike any other crisis event in the last few decades, Covid-19 has an extremely negative impact on tourism. As an illustration, the total number of international arrivals declined for -4.0% because of the global economic crisis of 2008 (Gössling, Scott, & Hall, 2020). The UN World Tourism Organization reported during the second quarter of 2020 for the first time ever that 100 per cent of global destinations introduced travel restrictions (Gopalakrishnan, Peters, & Vanzetti, 2020). Within two months, all tourist destinations were closed, both for organized and independent tourists, and the industry has collapsed all over the world (Sheresheva, 2020).

Tourism as we knew it just a few months ago has ceased to exist. (Niewiadomski, 2020). Therefore, the question arises when and how tourism can return to normal. In this regard, a certain parallel can be made with the health crisis of 2003 caused by the Severe Acute Respiratory Syndrome (SARS) which negatively affected Asian tourism. But unlike the global COVID-19 pandemic, the 2003 crisis had regional tourism consequences. The psychological impacts of SARS, coupled with travel restrictions imposed by various national and international authorities, have diminished international travel in 2003, far beyond the limitations to truly SARS hit areas (Wilder-Smith, 2006). The cause of this regionwide tourism collapse can be attributed more to how governments reacted to the perceived threat of the disease rather than to the real public health danger posed (McKercher & Chon, 2004). However, recovery from COVID-19 (caused by severe acute respiratory syndrome 2 (SARS-CoV-2)), is unlikely to follow the pattern of earlier post-crisis recovery (Prideaux, Thompson, & Pabel, 2020). The economic and societal significance of tourism varies dramatically across the global stage (Milne & Ateljevic, 2001) and North Macedonia is no exception. After a series of years of dynamic growth of the number of tourists and overnight stays, in 2020, dictated by the COVID-19 crisis, North Macedonia records the history lowest tourist numbers. The attempt to tackle the pandemic through the introduction of NPI measures have proved devastating to the economy, with North Macedonia facing a health and economic crisis. It is interesting that the timeline of facing the Covid-19 crisis in North Macedonia has two stages, where the second one is a more flexible approach, where life is slowly returning to normal, or at least in the „new normal“. The direct interventions form domestic tourism stimulation are also part of the more flexible approach.

Method and data source

The main methods that were used in the research are: method of analysis, synthesis, comparative method, method of deduction and others. Due to the dynamics of the issue, the most up-to-date information from relevant sources were used: government measures and announcements, News Releases of the State Statistical Office, scientific papers covering the problem of the pandemic and the impact of the pandemic on tourism, published in renowned publishing houses, as well as statistical yearbooks and other. In the paper, graphs and tables are used to represent the data.

Brief overview of covid-19

Coronavirus (COVID-19) is an illness caused by a new coronavirus that has spread throughout the world (Centers for Disease Control and Prevention, 2020). COVID-19 emerged in China in December 2019 and spread globally via the same air, land and sea travel networks used by the tourism industry (Prideaux, Thompson, & Pabel, 2020). As COVID-19 moved across the globe, Europe soon became the epicentre of the pandemic but has since been overtaken by the United States (Wen et al., 2020). While the COVID-19 outbreak in China in January 2020 was initially

seen to be a local issue (albeit its worldwide economic effects were recognised very soon), the spread of the virus to other parts of the world in February and March 2020 started a major global crisis of an unprecedented scale and nature. After a number of countries in all WHO regions registered cases, on 11.03.2020 the WHO Secretary General declared a pandemic of COVID-19 (Institute of Public Health, 2020).

With no vaccine to prevent the disease and limited medical interventions available to treat it, most countries responded with various forms of nonpharmaceutical interventions, including lockdown (home isolation, voluntary/required quarantine), social distancing (vulnerable or entire populations), closure of schools/universities and non-essential businesses/workplaces, cancelling or postponing events (i.e. major conferences and tradeshows, concerts and festivals, political debates and elections, sports seasons and the summer Olympics), and bans on gatherings of people over certain numbers (Gössling, Scott, & Hall, 2020). Therefore, it can be said that the coronavirus pandemic is a natural, but additionally a sociopolitical or human-made disaster and can be considered as a one of the most impactful events of the 21st century (Zenker & Kock, 2020).

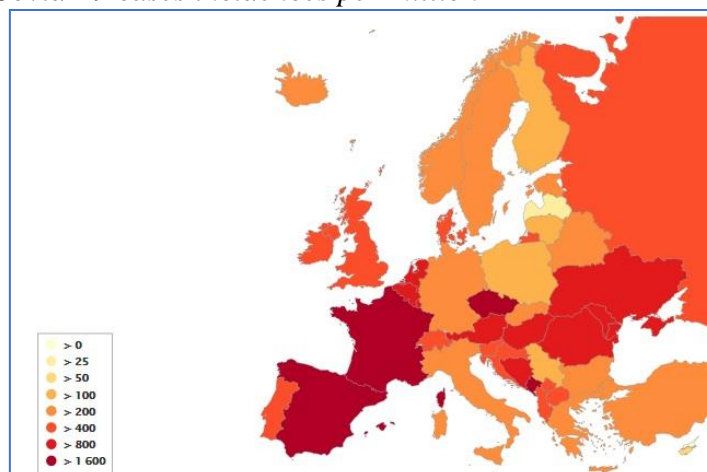
Brief overview of COVID-19 pandemic in North Macedonia

By early April 2020 most countries had closed their international and, in some instances, internal borders, halting international travel for an indeterminate time and transforming the tourism industry in a manner never seen outside of wartime (Prideaux, Thompson, & Pabel, 2020). The Government of the Republic of North Macedonia as of the first day paid serious attention to and monitors the condition with the Coronavirus infections in pursuance with the recommendations issued by the WHO and issues measures for protection of all citizens of the country (Government of the Republic of North Macedonia, 2020b).

On 18 March, the President of North Macedonia, Stevo Pendarovski, declared a state of emergency for the entire territory of North Macedonia, initially for 30 days, it was later extended until 22 June 2020 (OECD, 2020). The state of emergency was accompanied by drastic measures in the fight against the pandemic: closing borders and airports, free movement restriction (curfew) especially on weekends and religious holidays, sanitary protocols (mandatory wearing of a protective mask) and others. Especially in the early stages of the epidemic, the shock caused to the public before the threat of a health disaster, while disaster information was present daily in Italy and Spain, was balanced by the Minister of Health, Venko Filipche, in a manner very reminiscent of the public image and appearance of the mayor of New York, Rudy Giuliani, after the terrorist attack on 9/11 in New York City. North Macedonia opened its borders to all countries on 26th June (Marija Mitevska, Radio Slobodna Evropa, 2020).

However, on 8 July, the Government reintroduced the requirement of a negative PCR test of less than 72 hours for travellers from Serbia, Montenegro, Bosnia and Herzegovina and Kosovo (OECD, 2020). Citizens of North Macedonia still can not travel freely in EU countries, because North Macedonia is considered as a country of high risk, which does not show a reduction or stabilization of the disease curve. As of September 19, 2020, North Macedonia has recorded 794 new cases per 1 million inhabitants in the last 14 days (Covid-19 treker, 2020).

Figure 1: 14 days Covid-19 cases incidences per million



Source: <https://covid-19.treker.mk/en/stats>

Tourism development in North Macedonia

Tourism in North Macedonia has been growing steadily in the last few years, since the post-transition period of the tourism industry. In 2001, the lowest tourist turnover was registered (333,308 tourist arrivals and 1,254,582 overnights stays of tourists). Compared to 1987 (the most successful year in the tourism development of Macedonia), there is a decrease in the arrival of tourists by 3.5 times and a reduction in the number of nights spent by tourists by 3.2 times (Iliev et al., 2014). Exactly 2001, which is characterized as a year of armed conflict in the country, is proof that tourism growth in North Macedonia is often prevented by destabilizing events, such as political, economic or health crisis. This is also mentioned in the National strategy prepared by Kohl and Partner, where, among other factors, political and economic instability, as well as global crises, are highlighted as major threats to the development of tourism in North Macedonia (Kohl & Partner, 2016, p. 76).

The year 2018 reflected the highest number of foreign tourists and their overnight stays in Macedonia's history since independence, with 707,345 foreign tourists and 1,491,535 nights spent, which were 5.8 times higher than the number of foreign tourists and 5.4 times higher than foreign nights spent recorded in 2002. Regarding the foreign market, the most important are Turkish tourists with 166,620 nights spent (with a market share of 5.2% and an average stay of tourists 1.5 days), and Dutch tourists with 136,663 nights spent (with a market share of 4.3% and average stay of tourists 4.9 days). Then follow: Polish, Serbian, Bulgarian, Greek and German tourists (Iliev, 2019).

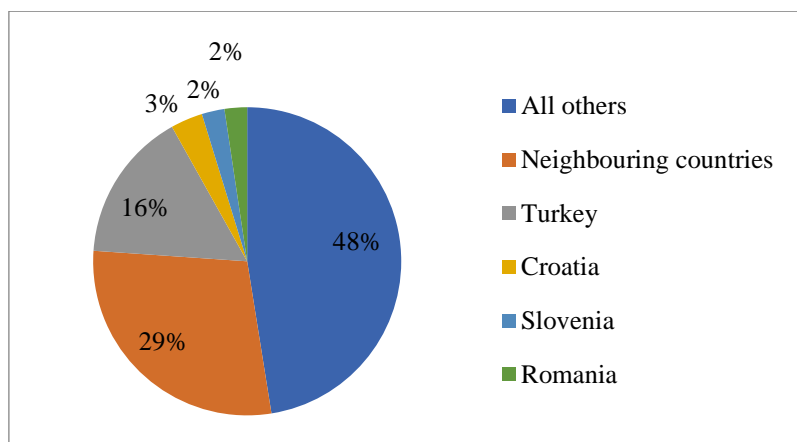
Table 1: Total number of nights spent

Year	Number of nights spent		
	Domestic	Foreign	Total
2014	1 273 370	922 513	2 195 883
2015	1 357 822	1 036 383	2 394 205
2016	1 407 143	1 054 017	2 461 160
2017	1 480 460	1 294 692	2 775 152
2018	1 685 273	1 491 535	3 176 808

Source: Statistical Yearbook of the Republic of North Macedonia, 2019

Based on the geographical, historical and cultural relations, as well as the geographical position of the country, North Macedonia has a certain regional identity as a tourist destination.

Figure 2: *Participation of tourists from the neighborhood and the region in the total number of foreign tourists*



Source: Statistical Yearbook of the Republic of North Macedonia, 2019; author's own calculations

A total of 29% of all tourists in 2018 came from five neighboring countries of North Macedonia. When the countries of the region (ex-Yugoslav countries, plus Turkey) are added to the neighboring countries, the total share in the number of tourists rises to 52%, which means that the majority of tourists coming to North Macedonia originates from the region.

In aspect of the types of tourist resorts in North Macedonia, it can be seen that the greatest interest is for the lake destinations, both for domestic and foreign tourists; while the city of Skopje is affirming as the main tourist destination for foreign tourists, recording an increase of 96,899 tourists in 2018 compared to 2016.

Table 2: *Tourists and nights spent by tourists by types of tourist resorts (foreign)*

Year	Total	Skopje	Spa resorts	Mountain resorts	Lake resorts	Other resorts
2016	510 484	206 796	3 751	14 861	177 300	107 776
2017	630 594	272 373	3 962	17 845	214 266	122 148
2018	707 345	303 695	4 466	22 019	247 918	129 247

Source: Statistical Yearbook of the Republic of North Macedonia, 2019

Table 3: *Tourists and nights spent by tourists by types of tourist resorts (domestic)*

Year	Total	Skopje	Spa resorts	Mountain resorts	Lake resorts	Other resorts
2016	346 359	21 806	24 525	41 630	205 683	52 715
2017	368 247	28 399	28 227	40 907	218 711	52 003
2018	419 590	35 379	26 778	43 362	256 255	57 816

Source: Statistical Yearbook of the Republic of North Macedonia, 2019

Republic of North Macedonia is characterized by a short tourist season, or in other words, the country is an interesting tourist destination for tourists during the summer months of July and August and quite insignificant part of the winter tourist season, while in terms of tourist destination/place, mainly for Skopje (the visit of the historical monuments, the numerous

conferences, congresses, events, etc.) and the lake resorts (traditional habits of the tourists that like recreational water areas) (Iliev & Kitevski, 2015).

Role of the government in COVID-19 conditioned tourism in North Macedonia

The state, understanding the importance of tourism in the economy, engages in its development. The government has financed several projects over the last decade with a positive effect on the tourism industry (Kohl & Partner, 2016). The role of the government is evident in the increased demand for domestic tourism (subsidized climate - thermal treatments for pensioners, weekend and monastery tourism, etc.), while international tourism returned to the scene thanks to an increase in certain types of tourism (especially the urban concentrated in Skopje), then the promotion of new activities in lake resorts (Ohrid, Dojran, etc.), expansion of airports, subsidizing low-cost charter flights to several European destinations, subsidized tours for foreign tourists, transformation of demand related sociocultural changes, subsidizing the promotion and organization of numerous events aimed at tourism etc. (Dimitrov, 2017). In response to the declaration by the WHO of the global COVID-19 pandemic, the Government has undertaken a series of regulatory responses to mitigate the negative effects of population protection measures on the economy (OECD, 2020). The success or otherwise of these decisions will be apparent in the future, illustrating the difficulty that decision makers face in developing policies in circumstances of uncertainty and an unknown future (Prideaux, Thompson, & Pabel 2020).

The Macedonian government responded to the crisis with a total of 3 sets of economic measures, and in September 2020 announced the fourth set of measures. The first two sets of measures mitigated the impact of the health crisis on the economy and the population, and were implemented between March and May 2020. The third package concerns revitalization, economic recovery and stimulation of consumption and industry which began on 17 May 2020 and is still ongoing (OECD, 2020).

As a key government approach in helping the tourism sector is the promotion of payment cards for citizens in order to encourage higher consumption and development of domestic economic activities (Government of the Republic of North Macedonia, 2020) as well as the campaign "Home is home", in order to promote domestic tourism potentials.

The tourist voucher is worth 6,000 denars which can be used in domestic tourist facilities, no later than 15.12.2020 and is received by employees who receive a salary of up to 15,000 denars. The payment card can be used in all catering facilities in the country and has a value of 3,000 denars (Ministry of Economy, 2020). Given that the measures are of short-term use, it is necessary to develop an additional long term strategy for the most affected branch in the country. In addition, North Macedonia is in danger of damaging the image of a tourist destination that was gradually built in the post-transitional tourist phase of North Macedonia.

Discussion and results

In the ancient world, wars stopped because of the Olympics: but in 2020, the Tokyo Olympics were postponed because of the COVID-19 crisis. Thus, we enter an era of new normality, caused and dictated by the coronavirus. In conditions of rigorous measures that treat all aspects of social life, tourism is by far the most endangered. In the first half of 2020, international arrivals fell by 65%, which is an unprecedented decline (UNWTO, 2020b) after a series of years of increasing the number of tourist arrivals. Although some destinations have started slowly to

open up, many are afraid of international travel or cannot afford it due to the economic crisis (Gopalakrishnan, Peters, & Vanzetti, 2020).

North Macedonia is no exception to the global pandemic and the devastating global crisis. In terms of tourism, North Macedonia records lowest numbers of foreign tourists in the history of the country, even worse than the season of 2001 armed conflict. Given that North Macedonia is characterized by a short summertime season, a couple of conclusions can be made in relation to the 2020 tourist season.

Table 4: *Total number of domestic and foreign tourists*

Domestic tourists			
June 2019	June 2020	July 2019	July 2020
30 022	3 347	74 196	70 600
Foreign tourists			
June 2019	June 2020	July 2019	July 2020
89 312	1 863	97 666	4 991

Source: Makstat News Release, No: 8.1.19.24; 8.1.19.28; 8.1.20.27; 8.1.20.23;

It is evident that there is a catastrophic decline of domestic and foreign tourists in June 2020 compared to June 2019. It should be noted that for most of June, the country was in a state of emergency (ended 22 June) and some restrictions on the free movement of citizens were still in place. The month of July is quite indicative: the catastrophic decline of foreign tourists continues, but the number of domestic tourists is similar to the previous, successful season, which is only 4.8% less than in July 2019, which in conditions of a global pandemic, should be perceived as large success in terms of domestic tourism activity.

Table 5: *Total number of nights spent*

Domestic tourists			
June 2019	June 2020	July 2019	July 2020
78 559	7 805	449 291	420 847
Foreign tourists			
June 2019	June 2020	July 2019	July 2020
186 262	6 374	233 563	15 333

Source: Makstat News Release, No: 8.1.19.24; 8.1.19.28; 8.1.20.27; 8.1.20.23;

In terms of overnight stays, we have similar indicators. There is a drastic decline in overnight stays of domestic and foreign tourists in June 2020, while in July, the situation with overnight stays of domestic tourists is a success. At first glance, the successful recovery of tourism in terms of the number and overnight stays of domestic tourists for the month of July can be attributed to the government's campaign to help tourism by stimulating consumption through vouchers and payment cards. But, on the other hand, the almost identical figures can be a result of the realization of the tourist desire and need of the domestic tourist, in conditions of impossibility/difficulties for tourism outside the country. Thus, it is difficult to assess whether the domestic tourist would have carried out a tourist activity in the summer of 2020, with or without the voucher incentive. Second, despite the implementation of the positive measure of the voucher, which has a deadline until December 2020, the disadvantage of the measure is the re-stimulation of the seasonal peak and types of tourism. It is understandable that most of the users of the voucher will use it in the very peak of the tourist season, and in the traditionally most visited tourist resort in North Macedonia

This can be easily seen through a comparative analysis of the tourist activity in North Macedonia in July 2019 and July 2020: In July 2019, out of a total of 171,862 tourists, 104,315 visited the lake resorts (61,845 domestic and 42,470 foreign tourists). A total of 546,759 overnight stays were realized in the lake resorts (408,635 domestic and 138,124 foreign tourists) (State Statistical Office – News release: Tourism, 2019). In July 2020, out of a total of 75,591 tourists, 64,704 visited the lake sites (63,412 domestic). A total of 406,090 overnight stays were realized there (402,662 domestic) (State Statistical Office - News release: Tourism, 2020). With the exception of the foreign tourists, it is almost identical tourist activity of domestic tourists compared to July 2019.

But especially important is the observation that in a pandemic, after the state gradually eased previously strong restrictive measures, domestic tourists were quite active in domestic tourism, which proves that if there are no restrictive measures, tourists will continue to travel. Therefore, tourism suffers from restrictive measures for free movement, and not from the global health crisis and a certain fear of disease. Judging by the example of North Macedonia, it can be concluded that tourism worldwide will be back on track as a first thing after the travel restrictions are lifted.

Another important point is the regional tourist identity of North Macedonia. At a time when world tourism is in decline, and the country can not count on a significant number of tourist arrivals from Western Europe and overseas, the government should have implemented a more flexible measures for tourists from the region (neighborhood, ex Yugoslav states, Romania, and Turkey) which participate with 52% of the total number of tourists in the country. Therefore, the directions in the recovery of tourism during the pandemic, should be towards the domestic, but also the tourists from the neighborhood and the region.

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