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Универзитет „Гоце Делчев“ –
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Факултет за туризам и бизнис
логистика

Faculty of Tourism and
Business Logistics

**Четврта Меѓународна Научна Конференција
Fourth 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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Пленарна сесија
Социо-економски импликации на КОВИД-19: намалување на
разликите и справување со дистрибутивните влијанија во различни
сектори

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д-р Татјана Бошков, вон. професор и декан на Факултет за туризам и бизнис логистика, Универзитет „Гоце Делчев“ – Штип, РС Македонија.

Втора сесија: Туризам, угостителство и гастрономија

д-р Наташа Митева, доцент и продекан за настава, Факултет за туризам и бизнис логистика, Универзитет „Гоце Делчев“ – Штип, РС Македонија.

Panel session

Socio-economic implications of COVID-19: reducing disparities and addressing distributional impacts in different sectors

Session chair: Tatjana Boshkov, Assoc.professor and Dean at Faculty of tourism and business logistics, „Goce Delcev University – Stip, N. Macedonia

Panelists

1. Gligor Bishev, University professor and Management Board Chairman, Sparkasse Bank, N. Macedonia
2. Zarko Radjenovic, PhD, Research Associate, Innovation Center, University of Nis, Serbia
3. Natasha Miteva, PhD, Vice-Dean for Education, Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, N. Macedonia

Moderators

First session: Business logistics and business administration

Tatjana Boshkov, PhD, Dean at Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, N. Macedonia

Second session: Tourism, hospitality and gastronomy

Natasha Miteva, PhD, Vice-Dean for Education, Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, N. Macedonia



УНИВЕРЗИТЕТ „ГОЦЕ ДЕЛЧЕВ“ - ШТИП
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ФАКУЛТЕТ ЗА ТУРИЗАМ И БИЗНИС ЛОГИСТИКА
FACULTY OF TOURISM AND BUSINESS LOGISTICS

ЧЕТВРТА МЕЃУНАРОДНА
НАУЧНА КОНФЕРЕНЦИЈА

FOURTH INTERNATIONAL
SCIENTIFIC CONFERENCE

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Содржина – Contents

СЕСИЈА: БИЗНИС ЛОГИСТИКА И БИЗНИС АДМИНИСТРАЦИЈА	16
SESSION: BUSINESS LOGISTICS & BUSINESS ADMINISTRATION	16
Tatjana Boshkov; Mishko Djidrov - CIRCULAR ECONOMY DEVELOPMENT AND RESOURCE EFFICIENCY: EVIDENCE FOR MACEDONIA	17
Dushko Joseski; Tatjana Boshkov - MONETARY ECONOMICS: POST-KEYNESIAN STOCK-FLOW CONSISTENT APPROACH (PK-SCF) VERSUS NEW-KEYNESIAN DYNAMIC STOCHASTIC GENERAL EQUILIBRIUM (NK-DSGE)	25
Елизабета Митрева; Трајанка Стојменова; Златко Трајковски - ПРИМЕНА НА МЕТОДОЛОГИЈАТА НА ДИГИТАЛНИ ЛОГИЧКИ СИСТЕМИ ВО ТРАНСПОРТОТ ВО ТИМОКОМ ЛОГИЧКИ СИСТЕМ	59
Емануела Есмерова; Драшко Атанасоски - МОДЕЛИ НА РАЗВОЈ НА ЧОВЕЧКИТЕ РЕСУРСИ ВО ЕКОНОМИЈАТА НА ПРЕТПРИЈАТИЈА.....	72
Марија Магдинчева-Шопова; Анета Стојановска-Стефанова - ПОЛИТИКИ И ПРАКТИКИ ЗА РАЗВОЈ НА СОЦИЈАЛНОТО ПРЕТПРИЕМНИШТВО	80
Анета Стојановска-Стефанова; Марија Магдинчева-Шопова; Христина Рунчева-Тасев - СОЦИО-ЕКОНОМСКОТО ВЛИЈАНИЕ НА КОВИД-19: МАКЕДОНСКИОТ СЛУЧАЈ СО РАЗВОЈ НА Е-ТРГОВИЈАТА	86
Žarko Rađenović - TRANSPORTATION MANAGEMENT SYSTEMS: LOGISTICS PERFORMANCE INDEX APPROACH	100
Ивица Јосифовиќ; Игор Камбовски - ВИЗНАТА ПОЛИТИКА НА ЕВРОПСКАТА УНИЈА ВО ДОГОВОРОТ ОД ЛИСАБОН: ПРЕДИЗВИЦИ И ПЕРСПЕКТИВИ	109
Svetla Panayotova; Ventsislava Nikolova-Minkova - IMPORTANCE OF INTELLECTUAL PROPERTY FOR SMEs IN THE DIGITAL ECONOMY	120
Ventsislava Nikolova-Minkova - ECONOMIC PERSPECTIVES ON INTELLECTUAL PROPERTY MANAGEMENT	128
Mimoza Serafimova; Bobana Stefanoska - SOCIO-ECONOMIC IMPACT OF COVID-19 CRISIS ON HUMAN RESOURCES AND COMPANIES	135
Александра Жежова - ОДНЕСУВАЊЕТО НА ЛИЧНОСТА И ПОЗИЦИЈАТА НА РАБОТНОТО МЕСТО	149
СЕСИЈА: ТУРИЗАМ, УГОСТИТЕЛСТВО И ГАСТРОНОМИЈА.....	159
SESSION: TOURISM, HOSPITALITY & GASTRONOMY.....	159
Dushica Popova; Natasha Miteva - SERVICE QUALITY MODELS IN HOSPITALITY INDUSTRY	160
Cvetanka Ristova Maglovska; Ivan Durgutov - REBUILDING TOURISM AND TRAVEL FOR THE FUTURE: POLICY RESPONSES TO THE CORONAVIRUS (COVID-19). 167	

Љупчо Јаневски; Климент Наумов - ЕКОТУРИЗМОТ КАКО СПЕЦИФИЧНА ТУРИСТИЧКА ФОРМА ВО НАЦИОНАЛНИТЕ ПАРКОВИ НА РС МАКЕДОНИЈА	176
Tatjana Dimitrova; Slavi Dimitrov - TOURISM MANAGEMENT THROUGH PLANNING DOCUMENTS AT REGIONAL AND LOCAL LEVEL	183
Никола В. Димитров - РЕГИОНАЛЕН ПРЕГЛЕД НА ПЛАНИНСКИОТ ТУРИЗАМ ВО РС МАКЕДОНИЈА	192
Душица Матета Гилова; Елизабета Митева - ГЛОБАЛИЗАЦИЈАТА И ТУРИЗМОТ ВО РЕПУБЛИКА СЕВЕРНА МАКЕДОНИЈА	204
Dora Kabakchieva - ADDITIONAL VALUE AND EFFECT OF DIGITALIZATION IN TOURISM	220
Илија Закоски - УЛОГА НА ИНТЕРНЕТОТ ПРИ ИЗБОР НА ТУРИСТИЧКА ДЕСТИНАЦИЈА И ОРГАНИЗАЦИЈА НА ТУРИСТИЧКО ПАТУВАЊЕ	230
Dragan Tezanovic; Sanja Filipovic; Maja Banjak - COFFEE AS A SIGNIFICANCE SEGMENT OF THE CATERING OFFER - CASE STUDY OF THE CITY NIŠ	238
Biljana Petrevska; Dajana Vjelajac; Bojan Djercan - DARK SKY TOURISM: PROSPECTS AND CHALLENGES FOR NORTH MACEDONIA	245
Перпарим Кахили - КЛИМАТСКИ И ХИДРОГРАФСКИ КАРАКТЕРИСТИКИ ВО РАЗВОЈОТ НА ТУРИЗМОТ ВО РЕГИОНОТ ЈИЛАН	254
Дарко Мајхошев; Цане Котески - ЛИСТИ НА УНЕСКО ЗА ЗАШТИТА НА СВЕТСКОТО НАСЛЕДСТВО СО ПОСЕБЕН ОСВРТ НА ЛИСТАТА НА СВЕТСКО НАСЛЕДСТВО ВО ОПАСНОСТ	264
Monika Angeloska- Dichovska; Katerina Vojkovska; Elizabeta Tosheva - INNOVATION STRATEGIES FOR YOUTH TOURISM AS A CONTRIBUTION TO THE ECONOMIC DEVELOPMENT OF THE WESTERN BALKAN COUNTRIES	274
Naser Bresa - VERMICA -TOURIST OASIS, CULTIVATOR AND SERVER OF TROUT	285
Арбен Халили; Мислим Зендели - АПИТУРИЗАМ КАКО НОВА ДИМЕНЗИЈА ЗА ПАТУВАЊЕ НИЗ ШАР ПЛАНИНА	292
Билјана Николовска - ПРЕДИЗВИЦИ И ИНОВАЦИИ НА МАКЕДОНСКИТЕ ТУРОПЕРАТОРИ СО ПОСЕБЕН ОСВРТ НА ПЕРИОДОТ ОД 2019 ДО 2021 ГОДИНА	302
Зоран Николовски - ОРГАНИЗАЦИЈА И КЕТЕРИНГ НА ДЕЛОВНИ НАСТАНИ НИЗ ПРИЗМА НА МАКЕДОНСКИТЕ КЕТЕРИНГ КОМПАНИИ	309
Vanya Vasileva; Iliana Dimitrova - DEVELOPMENT OF GOLF TOURISM ON THE NORTHERN BULGARIAN BLACK SEA COAST	316
Васко Шутаров - ГАСТРОДИПЛОМАТИЈА ВО ВРЕМЕ НА ПАНДЕМИЈА	327
Velibor Tasevski - IMPACT OF THE COVID 19 PANDEMIC ON NUMBER OF TOURISTS IN REPUBLIC OF N. MACEDONIA	337
Цане Котески; Александар Магдески - СОВРЕМЕНИ ФОРМИ НА МЕЃУНАРОДЕН ТУРИЗАМ СО ПОСЕБЕН ОСВРТ НА ГРАДСКИОТ И ЕВЕНТ ТУРИЗМОТ	344

Karlo Mac; Cvetan Kovac - THE IMPACT OF CRISIS ON THE SEASONALITY OF CROATIAN TOURISM AFTER 2000	362
Златко Јаковлев - МЕНАЏМЕНТ НА АНИМАЦИЈАТА ВО ТУРИСТИЧКО - УГОСТИТЕЛСКИТЕ ПРЕТПРИЈАТИЈА	370
Тања Ангелкова Петкова; Цветанка Ристова Магловска - ЗНАЧЕЊЕТО НА ТУРИСТИЧКИТЕ АГЕНЦИИ ЗА РАЗВОЈ НА МАКЕДОНИЈА КАКО АТРАКТИВНА ТУРИСТИЧКА ДЕСТИНАЦИЈА.....	379

REBUILDING TOURISM AND TRAVEL FOR THE FUTURE: POLICY RESPONSES TO THE CORONAVIRUS (COVID-19)

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Abstract

Tourism and travel are among the most affected sectors by the COVID-19 pandemic, which has had an impact on economies, livelihoods, public services, and opportunities across the globe. To limit the virus, all parts of its extensive value chain have been affected, with a massive drop in international demand and global travel restrictions, including plenty of borders being completely closed. Nowadays, after the decline in the number of new infections, many countries started to ease COVID-related restrictions for tourism recovery programs that include encouraging domestic tourism first, then negotiating travel bubbles as a stepping stone to a fully open regime as well as investing in a more resilient and sustainable tourism sector.

Key words: COVID-19, policy, rebuilt, tourism, travel.

Introduction

Before the coronavirus disease (COVID-19) pandemic, tourism was one of the fastest-growing industries, thanks to a number of factors such as sustained economic growth, liberalized air travel, and regional cooperation. Many countries have recognized the potential of tourism to contribute considerably to economic growth and have placed it at the top of their development priorities list. This is especially true for small countries with few manufacturing jobs but plenty of tourism assets. But, the worst tourism crisis in history is now in its second year. Between January and May, international tourist arrivals dropped by 85% in January-May 2021 compared to the same period of pre-pandemic year 2019, or 65% over 2020, as travel restrictions remained high due to the coronavirus pandemic. This follows an unprecedented drop of 73% in 2020 marking it as the worst year of tourism backing to levels of 30 years ago (UNWTO, 2021). Therefore, in order for tourism and travel to recover, governments must establish a staged approach of policies to balance public health and economic needs (Orindaru *et al.*, 2021). They might begin by encouraging domestic travel while foreign travel restrictions remain in place. Domestic tourism could be boosted if travel restrictions within the country are relaxed (Hussain, 2021). Meanwhile, countries who have successfully contained COVID-19 can consider creating travel bubbles or green corridors with other countries that have had similar success as between Singapore and Hong Kong, and between Australia and New Zealand (Xie *et al.*, 2021). On a sub-regional level, these bilateral travel arrangements can be expanded to a group of countries allowing people to travel between regions subject to travel restrictions.

Policy options for tourism crisis

Tourism is a significant part of many national economies, and the immediate and immense shock to the tourism sector resulting from the coronavirus pandemic is affecting the wider economy (OECD, 2020a). After the COVID-19 pandemic plunged in 2020, governments around the world have introduced unprecedented measures to contain the virus such as closing the borders, suspend flights and restrict travel where with no doubt the global tourism industry took a hit. The collapse of the industry has had

far-reaching consequences, especially for small countries that rely on it almost entirely for foreign exchange inflows and a significant amount of their gross national revenue. Now, many countries are entering in a new phase in fighting the virus where with strengthening monitoring mechanisms, governments believe that there is a way for tourism and travel to recover as an economic activity, ensuring the easing of travel restrictions with introduction of new measures and policies. Below, in the findings of this paper, the authors will divide and highlight the government strategies, supports and messages for businesses and tourists needed for the reshape of the structure of the tourism economies.

Short-term policy recommendations

1. *Restoring tourism and traveler confidence with travel bubbles.* Travel bubbles, also known as travel corridors or corona corridors, are essentially an exclusive collaboration between two or more countries that have shown significant success in confining and combating the COVID-19 pandemic within their borders (Yu *et al.*, 2021). To encourage a revival of travel in the short term, these travel corridors, or bubbles, should be implemented. Once in the travel bubble, tourists must comply with the pandemic prevention measures for departure and return (Hudáková, 2021). Bilateral travel bubbles are especially recommended to countries that are highly dependent on tourism from one source country.
2. *Investing in domestic tourism.* Domestic tourism may lead the recovery in the early stages of tourism and travel with the right strategy and incentives. As a short-term policy, domestic travel is an option because often does not require air travel, and restrictions on domestic travel are likely to be relaxed sooner than those on the arrival of foreign visitors and with that will boost the resumption of the tourism industry in the wake of the pandemic (Sharma *et al.*, 2021). Also, domestic tourism and travel promotion serves a dual purpose of reactivating the economy while also acknowledging the necessity of everyone having access to leisure.
3. *Financial support.* Financial measures and policies supporting tourism can range from exemption or postponement of taxes, loan payments, and tourism related fees, to the introduction of financial instruments such as special lines of credit, liquidity support, new loan schemes, investment programmes, and support for jobs/employment for the tourism industry. All these programmes, needed urgently, can aim to provide financial support to struggling tourism businesses especially SMEs (Allaberganov *et al.*, 2021).

Medium-term policy recommendations

1. *Stimulating tourist demand.* Going further, efforts will need to be made to re-establish international travel and restore tourist's confidence in order to boost demand. Governments immediate challenge that they need to tackle is the need to develop a communication strategy for delivering confidence in health and sanitation protocols and convenience for their travelers (Pongsakornrungruangsilp *et al.*, 2021). Some countries are employing apps such as COVIDPASS, which indicates that a tourist is COVID-19 negative. This acts as a digital health passport using blockchain technology (Broom, 2020). Meanwhile there is the option for governments to issue a series of promoting policies as well, such as travel coupons and discounts, which aim to stimulate recovery of the tourism industry while preventing COVID-19 (Chen *et al.*, 2020).
2. *Protecting businesses.* Tourism businesses have been racing to ensure the safety of their employees, customers, brand image and cash liquidity. Now to re-start, tourism business are re-designing experiences to feature smaller groups of tourists, outdoor activities and/or private experiences complying with social distancing and gathering restrictions and tourist's expectations (Sigala, 2020). With this change, governments have a role to play in actively cultivating socioeconomic linkages and networks throughout the tourism value chain to avoid leakage and to retain tourism revenues (Kampel, 2020). One opportunity is education and training programmes, provided jointly by the public and private sectors.

Long-term policy recommendations

1. *Supporting sustainable tourism development.* For the foreseeable future, the coronavirus pandemic will almost certainly revolutionize the tourism industry, if only by adding additional health and safety criteria to the list of factors that destination countries must invest in to remain attractive and competitive. And after nearly 2 years, the health and economic crises have been

provided with a chance to reconsider how tourism might better engage with our natural resources and ecosystems, resulting in a more resilient, resource-efficient, and carbon-neutral tourism sector. Therefore, green investments in protected areas, renewable energy, “smart” and more ecological buildings, along with the circular economy are all important for the recovery from COVID-19, thus enabling for the creation of a more sustainable and inclusive tourism sector.

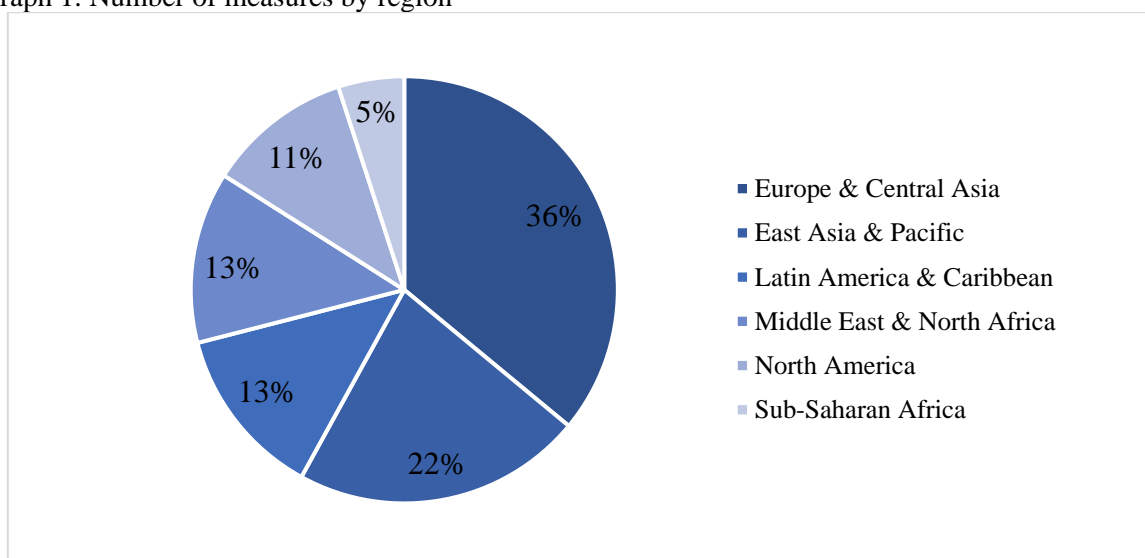
2. *Transformation of travel and tourism through digital technologies.* Through the development of tourism services and goods, the tourism sector will be transformed through promoting innovation and digital technologies. Embracing digital technologies can help businesses continue operating. Supporting businesses to diversify their operations, guest base, and revenue streams would improve their resilience in areas where tourism has nearly become the primary economic activity. Also, recent developments of technology advancement make it easier and more reliable for tourists to enhance their ability to explore the destinations, whereas virtual reality devices are more frequently penetrating the tourism industry, and tourists are looking for better services to experience (Akhtar *et al.*, 2021).

Exploring the government tourism measures and policies, the aim of this paper continues to examine the policy commitment with an overview of country policy responses to bring back the tourists and sustain the tourism and hospitality sector during the COVID-19 pandemic.

Overview of countries policy responses

As the situation evolves, countries have begun recognizing the need to implement tourism specific measures, countries and deploy measures and policies that are directly targeting tourism, particularly in those countries where the sector plays a significant role in the national economy, not only contributing to GDP but also to millions of jobs. Based on information from governments, this paper will show a closer look of the wide range of economic and social measures and policies adopted across all countries as a respond to the crisis. The response measures displayed below are national measures, reported on official public websites. First, we will discuss the policy interventions deployed by the tourism policy makers by regions. In data from World Bank (2020), countries in Europe and Central Asia have deployed the largest share (36 percent) of the identified interventions support the tourism sector, followed by East Asia and the Pacific (22 percent) and Latin America and the Caribbean (13 percent). Among individual countries, the United States has, however, deployed the largest number of identified interventions, followed by Australia.

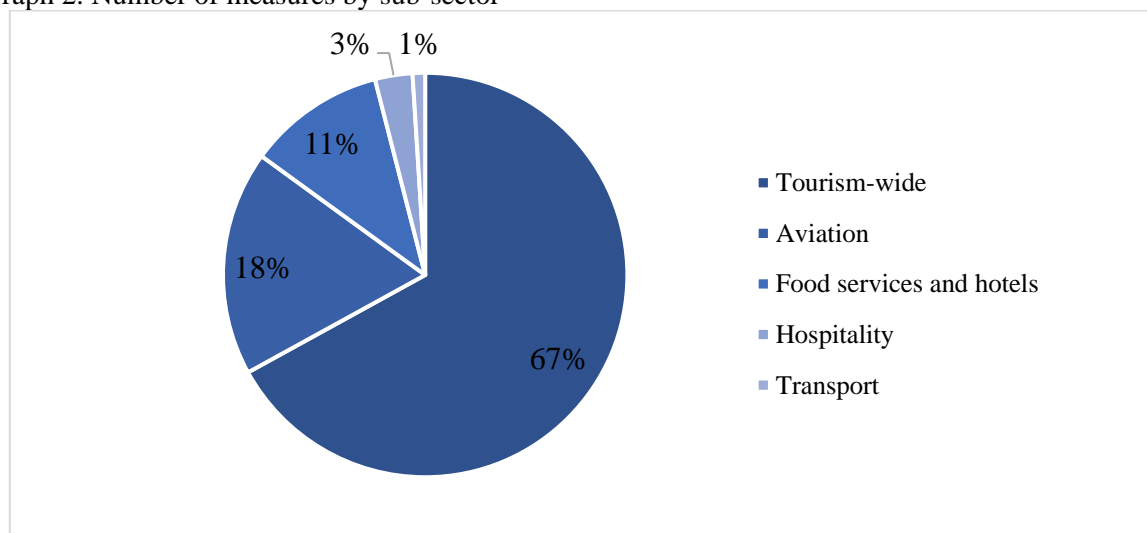
Graph 1. Number of measures by region



Source: World Bank (2020). Rebuilding Tourism Competitiveness: Tourism response, recovery and resilience to the COVID-19 crisis. p. 25.

Besides targeting policy responses to include measures to support travel and tourism as a whole, they were targeted at specific subsectors as well. As such, by a report from World Bank (2020), tourism-wide interventions comprise two-thirds of the identified interventions, followed by aviation-specific interventions (18 percent) and food service and hotel interventions (11 percent).

Graph 2. Number of measures by sub-sector



Source: World Bank (2020). Rebuilding Tourism Competitiveness: Tourism response, recovery and resilience to the COVID-19 crisis. p. 26.

Overall, the immediate and first response from governments when travel ban was lifted was to set up travel bubbles to allow freedom of movement during the pandemic outbreak. These exclusive quarantine-free travel may simply require a COVID pass certificates or a negative PCR test taken no longer than 72 hours before arrival. As of now, several countries have set up travel bubbles such as: Lithuania, Latvia and Estonia opened their borders to each other's citizens from May 15, 2020, creating a Baltic travel bubble (Zabotkina *et al.*, 2020), then in the southern hemisphere, Australia and New Zealand in late April 2021 opened the Trans-Tasman air-bubble and passengers can now travel quarantine-free between the two nations (Hussain, n.d.), also India who even though is amongst the top 3 countries with the highest infection rate, has finalized an air bubble agreement with 28 countries in total: Afghanistan, Bahrain, Bangladesh, Bhutan, Canada, Ethiopia, France, Germany, Iraq, Japan, Kenya, Kuwait, Maldives, Nepal, Netherlands, Nigeria, Oman, Qatar, Russia, Rwanda, Seychelles, Sri Lanka, Tanzania, Ukraine, UAE, United Kingdom, United States and Uzbekistan (Ministry of Civil Aviation, 2021). The European Union's current travel air bubbles welcomes citizens from countries of Australia, New Zealand, Rwanda, Singapore, South Korea and Thailand to enter the Schengen Zone (European Travel Commission, 2021). Netherlands' Tourism Board also proposed a three-country travel bubble that includes them along with Belgium and Germany to boost the tourism industry. This is a strategic partnership for the Dutch government because when it comes to tourism, German and Belgian tourists made up 40% of the total visitors (Walker, 2021).

Among the most popular countries' initiatives to rebuild tourism was also to promote domestic demand. With domestic tourism as a priority, many countries were providing two different types of initiatives financial incentives and marketing and promotion. UNWTO's (2020a) list is compiled with incentives that can take the form of vouchers, fiscal incentives or long weekends, whereas for example under specific conditions, Italy granted a Holiday Bonus (Bonus Vacanze) for families, allowing them to travel inside the country and reactivating demand. For stays in hotels, campsites, vacation villages, farmhouses, and bed & breakfasts in Italy, the holiday bonus offers a contribution of up to EUR 500. A

similar plan in Poland has been implemented, including free coupons for families with children. Each household with a child under the age of 18 or a disabled child is eligible for a PLN 500 voucher (EUR 110). Example follows where Macao (China) has established the Macao Ready Go! Local Tours programme, which encourages Macao locals to sign up for tours offered by local travel businesses. As for fiscal incentives, in Hungary, The SZÉP Card, which is issued by commercial banks and works almost like a bank card, will allow for larger benefits eligible (accommodation, catering, and leisure-time). In Turkey VAT rate on domestic flights is reduced to 1% from 18% for three months. Also, Costa Rica enacted a law that will shift all national holidays in 2020 and 2021 to Mondays, allowing Costa Ricans to take advantage of long weekends to travel domestically and extend their vacations in tourism locations across the country, adding to the tourism sector's rebuilding.

Efforts have largely aimed to provide financial aid to protect the most vulnerable tourism businesses during the pandemic. UNWTO (2020b) reported that Finland, Italy, and New Zealand have approved financial assistance to their national airlines, while Brazil, Costa Rica, and Norway have announced the suspension of air passenger taxes and other aviation taxes. Tourism businesses and airlines in the Russian Federation are now able to postpone their tax payments and the Guatemalan government has agreed to postpone the payment of taxes on lodging and airline tickets, while Singapore's airport fees have also been reduced. Croatia has established a package of assistance measures expressly for tourism businesses, including postponing fees and tourism taxes and improving liquidity, in order to increase access to liquidity support and fiscal relief. In addition, the tourism sector is aided by broader economic interventions such as the inclusion of tourism in the scope of the Export Guarantee Fund, which allows for the issuing of guarantees for bank loans and therefore more liquidity (HBOR, 2021). In France, the government has changed the terms for cancelling travel (and similar) reservations, allowing refunds to be replaced with a credit note or voucher for an equivalent amount redeemable for a future service; clients can request a return for un-used vouchers after 18 months. As a result, businesses can avoid quick cash outflow and endure this exceptionally difficult period (European Consumer Organization, 2020).

For restoring tourist's confidence and stimulating demand, many countries have been quick to act to help resuscitate tourism demand. Portugal uses strategies such as "Clean and safe" labels to distinguish tourism activities that follow to hygiene and cleanliness standards for the prevention and control of COVID-19 and other potential diseases, visitor information applications, and domestic tourism promotion campaigns (Madureira, 2021). To boost demand, Japan announced an emergency economic package on April 7, 2020, which includes a new subsidy of approximately USD 10 billion in consumer discounts and vouchers, enhancing tourism, transportation, food services, and event industries in the early aftermath of the outbreak. After the pandemic is over, the Japan Tourism Agency expects to spend USD 2.2 billion to attract tourists to Japan by upgrading travel locations, improving the travel experience, and promoting international tourism campaigns (OECD, 2020b). From October 2020 to March 2021, Cyprus has approved a fund for the implementation of activities to encourage tourism in collaboration with airlines and travel providers, as actions to boost tourist demand (Mihai-Yiannaki & Mullen, 2020).

A long-term policy consideration that also resulted from the pandemic crisis is the support for sustainable recovery of tourism. The crisis presented a unique opportunity to rethink the tourism system for a more sustainable and resilient future. To better shape the tourism sector in the post-pandemic setting, Greece has already prioritized the transition to a greener and sustainable tourism economy, reinforced by digital transformation. In the Netherlands, the national destination marketing organization (Holland Marketing) is working with local marketing organizations to build a national recovery strategy to help the tourism industry recover more sustainably (OECD 2020a). The shock in, Corsica, France, increased local stakeholders' awareness of the sector's fragility and provided a significant motivation to ensure that recovery activities promote a greener transition (OECD, 2021). Kyoto Destination Management Organization is also refocusing its recovery strategy to focus on local needs and promote long-term growth. Kyoto is taking advantage of the crisis to rethink its tourism management system and pursue growth while putting a greater emphasis on the needs of the local community. The city's

rehabilitation strategy aims to make it a high-quality attraction for both residents and tourists (OECD, 2021).

There have also been policy initiatives, which utilize digital technology. Lithuania for example wants to change its tourist industry by encouraging innovation and the use of digital technologies in the creation of tourism services and products. As a result, the E-Business Model tool aims to fund new business models by implementing e-business solutions, while the Retraining of Enterprise Workers tool and Innovative Checks tool aims to fund the purchase of publishing, voice reading, translation, photography, filmmaking, design, communication, and other services (Ministry of the Economy and Innovation of the Republic of Lithuania, 2020).

Key considerations moving forward for tourism policy

Living in a globalized world, per se, means living in conditions where traveling is available, where a person can reach the furthest point in a certain amount of hours. The tourism, as a sector, which undoubtedly was among the ones mostly affected by the COVID-19 pandemic, will remain sustainable and perform well again only if the proper steps for stepping forward are undertaken. The tourism under face masks, at the very beginning, looked like something impossible, but here we are, almost two years after, having the outlook for it as really uncertain.

On one hand, having practical examples of countries, especially in our closest surrounding, such as Montenegro and Albania, which have decided this year's summer season to be their first priority, we have seen cases there that show lifting restrictive measures, i.e. no measures at all in the name of the tourism. A scenario that may seem extreme, but was happening, was that for entrance into these two countries no vaccination certificate was requested, neither negative COVID-19 test results was asked through PCR/rapid antigen test. Domestic critics there were saying that this represents doing just too much in the name of the tourism and that as a policy this will not be so sustainable and the price will be paid later on.

On the other hand, countries like Greece have been performing the recent summer, in accordance with different set of measures. A proof for vaccination or a proof for a negative COVID-19 test result, this was a *conditio sine qua non* for entering the country. Besides that, the so-called PLF (Passenger Locator Form) and its fulfilment was pre-condition to pass the Greek border. This clearly shows us that some countries, even though they are considered to be top touristic destinations and hub for tourists from all around the world, they still were trying to balance and keep the health situation under control and allow the summer season to go on, at the same time.

The above-mentioned two contrary approaches tend to define some of the considerations for moving forward the tourism policy. The COVID-19 pandemic has unprecedented negative effect and influence on the economy, the tourism, the travel agencies and tour operators.

As the sanitary situation throughout the world seems to be getting better and vaccines bring the positive news, we must not forget that, overall, the situation is far from the one before the pandemic. The tourism and any policy that may and should be created regarding it can bring the sector forward only if the measures included are balanced and continue to the necessary compromise between economy, safety and mental health. Drawing initial lessons from the current situation, policy makers will also need to learn from the crisis to build a stronger, more resilient tourism economy for the future. While it is still too early to determine the situation, authors believe that thinking forward may outline some key points for the policy makers such as:

1. Governments at all levels, as well as the business sector, must be better prepared and capable of reacting and adapting swiftly to the pandemic. The situation will require more effective risk assessment and crisis response procedures, as well as greater coordination – at the local, national, and international levels.

2. Governments needs to focus focused policy interventions on specific tourism sub-sectors such as hospitality, food services, hotels, and airlines.
3. A new generation of policies and programs for the ability of the tourism sector to generate jobs. In this case, deferred taxation and extended tax holidays will boost private sector confidence as the tourism economy recovers.
4. As the effects of the pandemic continue, not all tourism business will respond equally to the situation. Here, governments must introduce temporary and time-limited measures to restructure debt and avoid early insolvency, while not hindering the liquidation of failed businesses.
5. Demand for specific tourism products may be changed, resulting in the emergence of new forms. As such, demand for business travel items may be changed as a result of growing tolerance for virtual meetings and discussions. Governments could leverage technology and internet platforms to increase the tourism industry's benefits.
6. Government support towards more sustainable, resilient, competitive, resource efficient and carbon-neutral tourism sector tourism sector should begin now. Green investments for recovery might include, among other things, protected areas, renewable energy, smart buildings, and the circular economy.

Limitations

There are several limitations to the data on policy response measurements. First, the degree to which policy measures are implemented varies by country, and there may be specific restrictions and exceptions to the policies, making the data interpretation more difficult. Official sources and academic authors often reported the exact dates of introduction of the policies, however delays in implementation may have occurred. Furthermore, the accessibility of public data from official government sources differs per country. For some countries, data are no longer available on official websites concerning measures that are no longer in force, which may result in the data for more recent measures being more complete.

Conclusion

The tourism industry has come to a halt as a result of the pandemic COVID-19. Vaccine research and distribution are assisting in the containment of the virus, but restrictions on international travel and tourism are likely to stay. Moreover, it is no wonder that many estimates are being thrown around about the potential impact of COVID-19 on tourism industry, given the fact, that the impact of the pandemic has resulted with travel restrictions and decrease of commercial flights, hotel occupancy, industry profits, and jobs. Now, we might say that the survival of the tourism industry and travel largely depends on a number of things such as: how long the pandemic will last, the severity of social distancing restrictions on tourism business, but mostly on the magnitude and effectiveness of government policies stimulus packages.

Globally, when discussing about tourism policy makers, we might say that countries are responding in different ways. From the above research, first, it should be noted that the sampled countries have implemented various tactical measures as part of their national tourism policies to deal with the current pandemic crisis. Knowing the significant effect of the tourism industry and travel on national economies, we might even say most of the countries have reacted quickly with the COVID-19 policies interventions focusing on immediate response and recovery.

As the situation unfolded, countries recognized the need to implement tourism specific measures and begun to deploy policies directly targeting tourism. Most countries as seen have responded with an immediate reaction to promote domestic tourism and support the safe return of international tourism. Encouraging the promotion on domestic tourism has been essential policy since is helping to mitigate the impact on jobs and businesses in some touristic destinations. And with domestic tourism as a priority

at the moment, practical examples show that countries have inflicted very strict policies when it comes to returning the tourist confidence. Many of them established a number of health and sanitary protocols, certifications and labels for clean and safe practices as a crucial step to restore trust and confidence in the tourist sector, but also on the other side various of marketing and promotional activities, product development initiatives, and special discounts began to appear. Research shows that countries have adopted several fiscal and monetary policies to sustain the impact of COVID-19 on tourism industry such as: debt financing, tax-related interventions, loan repayment support/credit support, cash grants/subsidies, training incentivization, rules alleviation and fees/bills waivers. At last, having this policy interventions, followed by longer-term measures, we might say that the current economic crisis provides a chance to reconsider tourism in the future. Our research here showed that countries nowadays with COVID-19 policies are seeing a possibility to use new technologies, implement green recovery plans, and business practices to better balance tourism's environmental, social, and economic impacts in order to build a stronger, more sustainable and resilient tourism industry.

However, since it is difficult to predict the new and uncertain future of travel and tourism due to COVID-19, tourist destinations and businesses have to be prepared for facing ongoing challenges as opportunities. This also applies to governments whereas their policy responses must be designed to deal with the immediate survival of the tourist industry. Consequently, we must conclude that the most successful actions in the sector will most likely come from a collaboration of several actors, namely, the government, other stakeholders, and the private sector.

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