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MAPPING OF PUBLIC POLICIES AND MEASURES IN BULGARIA IN SUPPORT OF TOURISM RESILIENCE DURING COVID-19 PANDEMIC

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Mariana Assenova, Vasil Marinov. MAPPING OF PUBLIC POLICIES AND MEASURES IN BULGARIA IN SUPPORT OF TOURISM RESILIENCE DURING COVID-19 PANDEMIC.

The aim of the paper is to reveal the impact of COVID-19 pandemic on Bulgarian tourism briefly and to make an inventory and systematically review the public policies and related economic and social measures to support the resilience of tourism enterprises and freelancers in the country. The identified policies refer to tour operators, hotel and restaurant operators, tour guides, and public resources and attractions concessioners. Public authorities also played a coordinating role in developing uniform measures to ensure the health and safety of travelers in accommodation, catering and entertainment facilities, tourist attractions and other tourist sites. The scope of public interventions in terms of allocated funds and beneficiaries is discussed as a first step of impact evaluation and some recommendations for future policy measures are made.

Keywords: public policy, policy measures, COVID-19, economic and social resilience.

INTRODUCTION

The tourism sector in Bulgaria was one of the most affected by the global crisis of COVID-19. The dramatic decline was due both to the refusal of trips by tourists themselves, as well as to the cancellation of trips by tour operators and the suspension of activities of travel service providers. The reasons were both subjective – the fear and worries of citizens undertaking trips at the risk of infection, and objective –

forced restriction and introduction of bans on incoming and outgoing tourism, and in several cases – on domestic tourism. Tourist enterprises (hoteliers, restaurateurs, carriers, attractions' owners, etc.), deprived of income, began to lay off their employees and, in the lack of working capital, were threatened with falling into insolvency and bankruptcy. With the development of the pandemic, financial liabilities were accumulated along the “supplier – tour operator – travel agent – client (tourist)” chain, predetermining the impossibility of refunding the amounts prepaid by consumers for requested and purchased travel packages and services within the legally established terms. Self-employed people providing tourist services – tour guides, mountain guides, animators, etc. – also found themselves in a difficult situation and without income.

To preserve the economic entities in the tourism market and those employed in tourism, with the aim of faster recovery of tourism after the pandemic (often and under the pressure of different sectors of the tourism industry), the state engaged in the development of policies in several directions, as well as with the introduction of specific measures through a series of legislative initiatives and changes, provision and/or redirection of financial resources, including from operational programs. Public authorities also played a coordinating role in developing uniform measures to ensure the health and safety of travelers in accommodation, dining and entertainment facilities, tourist attractions, and other sites visited by tourists.

The COVID-19 pandemic is considered to have caused the worst global crisis after the one caused by the World War II and tourism suffered the hardest hit of it (Estiri et al., 2020). The disaster required resilience planning for the future recovery of the sector. In 2020 the UNWTO presented its policy for action to mitigate the socio-economic impact of COVID-19 and to accelerate recovery (UNWTO, 2020), in which the three main recommended strategies included: 1) crisis management and impact mitigation; 2) stimulus and recovery acceleration; and 3) preparing for tomorrow (Collins-Kreiner and Ramb, 2021). A compilation of measures to mitigate the effects of COVID-19 crisis in the travel and tourism sector and accelerate recovery by country/institution and by category are shared and monitored on the UNWTO global tourism dashboard (<https://www.unwto.org/tourism-data/covid-19-measures-to-support-travel-tourism>). The research papers on the topic indicate that the governments intervened in country-specific ways to respond to the national circumstances (Sigala, 2020; Apaza-Panca et al., 2020; Estiri et al., 2020; Al-laberganov et al., 2021; Khalid et al., 2021; Shao et al., 2021; Collins-Kreiner and Ramb, 2021; Yeh, 2021; Kuščer et al., 2022). Some of the most popular measures included re-nationalization, tax reliefs, subsidies, deferrals of payments, and other economic and social stimulus packages. According to Sigala (2020) it is unique that the governments have become a much bigger actor in the tourism economy, while Kennell (2020) even considers the hugely interventionist role of the state in the tourism industry as an interruption of the neoliberal perspective on the appropriate role for the state within tourism.

All cited authors underline the demand for research on the public tourism policy in support of tourism restructuring and recovery to provide answers to the following questions in favor of policymakers:

- How to address crises collectively, since COVID-19 has raised political, geopolitical, and governance issues that need to be tackled based on the systems theory and crisis management (Sigala, 2020);

- How to be prepared for consecutive crises and how to manage crises in tourism (Rakadzhyska and Neshkov, 2020; Kaushal and Srivastava, 2021; Yeh, 2021; Kuščer et al., 2022), including the evaluation and comparative analyses of COVID-19 pandemic interventions and learning from them (Kennell, 2020);

- What should be the contemporary role of the state in the tourism industry, especially in terms of the relationship between the state and the private sector in tourism, “as the restructuring of the industry after the pandemic will be accompanied by innovations in industrial policy at the government level” (Kennell, 2020);

- What should be the aspects of the innovative tourism policy (Lee and Goo, 2020), etc.

In Bulgaria, in a very short time and the lack of a crisis management plan, several reactive ad hoc measures aimed at different target groups have been initiated, many of them unusual and/or unprecedented, but so far there is no general view of what has been done as public interventions in the field of tourism. That gap pre-determines the need for the policies and the specific measures to be identified and systematized in a certain way, which will facilitate a potential future comprehensive assessment of their overall impact from the point of view of the different groups of stakeholders and their reactions to the implemented measures.

METHODOLOGY

The paper aims to briefly reveal the impact of the COVID-19 pandemic on Bulgarian tourism and to make an inventory and systematically review the public policies and related economic and social measures to support the resilience of tourism enterprises and tourism freelancers in the country. As pointed out by Estiri et al. (2020) in times of crisis tourism policymakers face three major challenges in dealing with: 1) determining how large the crisis is and what impact it will have on the tourism economy; 2) the duration of the crisis, because of the definite difference between the short-term and long-term types of policies, and 3) the choice of policies to implement. In compliance with the described action algorithm and taking into consideration the recommended strategies of UNWTO (2020), the main tasks to achieve the goal of the research include:

- To assess the effect of the COVID-19 pandemic on tourism activities in the country in the initial stage of the pandemic to outline the problematic areas, which had to be immediately addressed.

– To make an inventory and systematically review the initiated policies and the implemented measures based on regulative and administrative documents aimed at mitigating the consequences and the survival of tourist enterprises, as well as on press-releases of the national tourism authority.

– To evaluate the impact of the public policies and measures, limited only to their scope – allocated funds and beneficiaries (supported persons and organizations), and provide guidelines for new resilience policies and measures.

The assessment of the effect of the pandemic was made based on processing and analysis of statistical data from Eurostat and the National Statistical Institute for 2020, using information from other secondary sources, including scientific publications, as well. The impact assessment did not equally cover all tourism sub-sectors, as reliable and credible statistical information was only available for accommodation facilities and their use. Methods for processing statistical data were applied.

The study of the documents demonstrating the applied policies and measures in the period March 2020 – July 2022 included legislative and regulative documents at the European and national level, as well as reports and documents related to initiatives of the state tourism authority (Ministry of Tourism) and other public bodies (Appendix 1.). The documentary research method (DRM) was applied (Ahmed, 2020), and in summarizing and systematizing the findings the logical relationships of the causal model “problem – policy – measure – scope” was followed.

The assessment of the scope was based on publicly available data, released by public bodies on the allocated financial resources, the number of beneficiaries and disbursed funds, public reactions, etc. The use of information and data from other sources (including media publications) that could be contradictory, distorted, or biased due to the specific interests of individuals and groups was purposefully avoided at this stage.

RESULTS AND DISCUSSION

In 2019, according to NSI data, Bulgaria received 12.5 million international arrivals, accommodation facilities reported 8.2 million arrivals (including 4.1 million foreigners), and 27.2 million nights spent (including 17.5 million from foreigners). Total tourist expenses, respectively revenues from the tourism industry are estimated at over BGN 8.4 billion (EUR 4.2 billion), and 152,000 people are employed in the hotel and restaurant industry alone. According to Bulgarian National Bank data, revenues from international tourism were EUR 1.631 billion. The analysis of the available data shows a dramatic impact of the pandemic on the activity of tourism enterprises, in particular:

1) Nights spent and arrivals in accommodation establishments

In April and May 2020, the arrivals in accommodation establishments decreased by 98% compared to the same period of the previous year, the decrease in June was 94%, in July – 77%. and in August – 65%. The decrease in the number of arrivals

predetermined a similar decline, albeit to a lesser extent, in nights spent, which were 95% less in April, 92% lower in May and 88% lower in June. Even in July, the drop was significant – 62%, and only in August it was less than 50% (45% drop). For the period January-September 2020, the number of arrivals decreased by 50% and represented 50% of that in 2019, and the number of nights spent decreased by 56% and was 44% of that in 2019 (Marinov & Assenova, 2021). A collapse was also observed in the trips of foreigners to Bulgaria (Pamporov, 2020). In total, for the period January-September, foreigners staying overnight decreased by 71% and were only 30% of those in 2019, and the nights spent by them decreased by 74% and were 26% of those in 2019 (Marinov & Assenova, 2021).

2) Balance of payments

The balance of payments data presented by Pamporov (2020) showed that the COVID-19 crisis deprived the country of a credit balance of about EUR 816 million in the period March-July 2020. For August, the unrealized income was expected to be approximately another EUR 800 million, which could not be compensated.

3) Tourism employment

The number of employees in the hotel and restaurant industry in the March-September period was 25-50 thousand less than in the same months of 2019 (respectively, the decrease was between 23% and 40%). For comparison – for the economy, the decline in the number of employees was between 2.3% and 5.4% for individual months. The decline in hotel and restaurant employment was significantly greater in the first three months, during the state of emergency and at the start of the summer season (by 35-40%) but remained high even in the traditional peak months of July (-29%) and August (-25%). There were indications that the effect on employment was more strongly manifested in other economic activities related to tourism, in particular tour operators and travel agents, and tour guides. Especially problematic was the release from work (or dismissal) of qualified personnel who were oriented to other, less affected activities and there were no guarantees that they would return to the sector when the situation normalizes (Marinov & Assenova, 2021).

4) Activity of accommodation facilities and estimation of unrealized tourist expenses

A significant part of accommodation facilities was not functioning. The number of reported accommodation establishments in 2020 for the individual months of March to September was between 300 and about 1,500 fewer than in the same months of the previous year (down from 11% to 75%). In the peak summer months, the decline was 18% (July) and 15% (August) and reached its lowest value in September (11%) – an indication of the “shift” of the summer season towards autumn. There was a similar trend in the number of beds, but with higher reduction values, reaching 74% (May) and 82% (April), indicating more non-operating large accommodation facilities. Numerous media reports noted that large “industrial” hotels and complexes were more affected than small guesthouses and family hotels. The total capacity of accommodation facilities, measured by bed nights in operation

for the period January-September 2020, decreased by 33.5% and represented two-thirds (66.5%) of the capacity in the same period of 2019 (Marinov & Assenova, 2021). Much more dramatic were the changes in the use of accommodation facilities. For the period January-September 2020, the number of arrivals decreased by 50% and represented 50% of that in 2019, and the number of nights spent decreased by 56% and was 44% of that in 2019. Accordingly, the revenues from nights spent in the period January – September 2020 decreased by 58%, and in absolute value, the unrealized expenses were close to BGN 3.2 billion or EUR 1.6 billion (Marinov & Assenova, 2021).

The differences between the local and foreign markets were very significant. In total, for the period January-September, foreign arrivals in accommodation facilities decreased by 71% and were only 30% of those in 2019, and the nights spent by them decreased by 74% and were 26% of those in 2019. In contrast, the arrivals of Bulgarians in total for the period decreased “barely” by 25% and were 75% of those in 2019, and the nights spent by them decreased by 20% and were 80% of those in 2019.

The changes by month deserve special attention. In the first two months of 2020, a significant increase was observed compared to 2019 – on average by 15-18% of arrivals and by 17-20% of nights spent, higher among Bulgarians (19-21% of arrivals and about 21% of nights spent) than for foreigners (9-12% of arrivals and 11-18% of nights spent). A significant increase in local demand was also reported in August and September (by nearly 12% for arrivals and by 11-15% for nights spent), which was in contrast with the significant decrease in external demand in these months (by 63-65% of arrivals and with about 67% of nights spent). The data clearly showed that the Bulgarian market had largely saved the 2020 summer season and played its traditional balancing role.

5) Regional differences

Tourism in the different parts of the country was affected to a different degree and the severity of the problems was correspondingly different. The change in the number of arrivals was in the range from -65% to +55%, and in revenue from nights spent – from -67% to +67%.

The areas with the largest volume of tourism, which were traditionally distinguished by a significantly higher than average share of arrivals of foreign visitors – Varna, Burgas, Dobrich, and Sofia – the capital – were mostly affected (decrease by 61-65% in arrivals and by 56-67% in revenue from nights spent). These four areas accounted for a total of 88% of the decline in the absolute number of nights spent and 91% of the decline in revenue. The most impressive in absolute terms was the data for the Burgas region – loss of 6,4 million of nights spent and EUR 181 million revenue from nights spent.

At the same time, some areas reported growth (between 10% and 55% of nights spent and between 18% and 67% of revenue) or significantly lower than average decline (from -2% to -28% of nights spent and from -8% to 24% of revenue). Most

of these were areas with minimal tourism volume (up to 50-60 thousand nights spent), such as Montana, Razgrad, Vidin, Kardzhali, and other areas where the largest ski centers are located and had “strong” first months in 2020 (Smolyan, Blagoevgrad, Sofia).

6) Bulgaria's position in the European Union

All EU countries in 2020 were significantly affected by the crisis, but the differences in the severity of the problem were significant. Measured by the nights spent most affected were Greece (-75%), Malta (-68%), and Spain (-67%), and least affected were the Netherlands (-26%), Denmark (-30%), and Austria (-30%). Bulgaria was among the more strongly affected countries, with a declining value (-56%) above the EU average, which was close to that of Croatia (Eurostat, 2020).

Already at the beginning of the crisis, four types of impacts have been outlined (Yeh, 2020), which were closely interrelated:

- international disputes, e.g. about the origin of the virus, which lead to tensions in trade relations, restriction of supplies, and discrimination.

- economic decline affecting both tourism-related businesses and the entire economy – stagnation, unpaid leave, layoffs, rising unemployment, falling incomes, and – ultimately – a decrease in tourism demand, which in turn has a negative impact on the economy in general (“vicious cycle”).

- travel restrictions, which reduce potential tourism demand and tourism activity.

- social distancing, which reduces trust between people and can lead to discrimination and violence (e.g. in countries with large populations of immigrants).

Very similar were the problematic areas related to Bulgarian tourism, outlined by the brief analysis of the initial impact of the pandemic and requiring immediate public authorities' reaction – economic difficulties due to the decrease of demand and the restricted operation of tourism enterprises, dismissal of the labor force, as well as health and safety concerns. The implemented policies and measures addressing the arising problems in the country can be systematized in several groups and sub-groups, presented in table. 1.

Table 1.

Public policies and measures in Bulgaria in support of tourism resilience during COVID-19 pandemic (March 2020 – July 2022)*

№	Problems	Policies	Measures	Scope
1.	A. General policies and measures for the tourism sector Financial difficulties of the tourism sector	Policies for financial relief of tourism enterprises	<ul style="list-style-type: none"> Rescheduling of loans to tourism enterprises 	Tourism companies got the right to reschedule their loans initially until September 30, 2020, and subsequently until March 31, 2021.
		Policy for financial support of tourism enterprises	<ul style="list-style-type: none"> “Tourism Support” program of the Bulgarian Development Bank to assist hoteliers and restaurateurs with overdue liabilities 	In January 2022, BGN 60 million was secured for the refinancing of current loans; a direct benefit for about 25 thousand micro-, small and medium-sized companies.
		Policy for financial support of tourism enterprises	<ul style="list-style-type: none"> Scheme for providing funds to enterprises from the tourism sector that are experiencing liquidity difficulties due to the COVID-19 pandemic 	2,220 enterprises have been approved for financing, with a total amount of financial assistance – BGN 30 million, provided from the updated state budget in 2021.
			<ul style="list-style-type: none"> Grant scheme to support the tourism sector to compensate for losses arising directly and/or indirectly from restrictions on the activities of enterprises due to the introduced anti-epidemic measures. 	One-time grants (state aid) were received by 2,683 enterprises with a total value of BGN 30 million. provided by the state budget for 2021.
			<ul style="list-style-type: none"> Grant scheme „Support of small enterprises with a turnover of over BGN 500 thousand to overcome the economic consequences of the COVID-19 pandemic“ under the Innovation and Competitiveness Operational Program 	645 enterprises from the “Hospitality and Restaurant” sector and 27 enterprises from the “Culture, Sports and Entertainment” sector were supported with direct grants of BGN 50,000 each. Total amount of the provided grants – BGN 33.6 million.
	Policy for ensuring conditions for recovery and resilience	<ul style="list-style-type: none"> Incorporation of tourism in the National Recovery and Resilience Plan through measures for: <ul style="list-style-type: none"> Energy efficiency; Transport connectivity; Digital infrastructure, etc. Incorporation of tourism in the Regional Development Program (2021-2027) 	BGN 5.7 billion (41.8%) is planned for the „Green Bulgaria“ pillar, with total public and private funding of BGN 8.6 billion; BGN 2.5 billion (18.2%) is planned for the „Connected Bulgaria“ pillar, with a total of BGN 3.6 billion in public and private funding.	
			<ul style="list-style-type: none"> Incorporation of tourism in the Competitiveness and Innovations in Enterprises Program (2021-2027) 	Resources for investments in the preservation, development, and promotion of public tourist assets and tourist services with a total value of more than EUR 87 million are foreseen. Tourism enterprises are envisaged as eligible beneficiaries on the main instruments for business support.

№	Problems	Policies	Measures	Scope
2	Loss of work-force	Policy to preserve jobs and promote employment through financial support and compensation	<ul style="list-style-type: none"> • Payment of compensation to employers for preserving the jobs of workers on labor contracts in the event of suspension of the operation of the enterprise, part of the enterprise or individual workers and employees or in the introduction of part-time work due to the state of emergency • “Employment for you” for the reintegration of unemployed persons • “Short-term employment support in response to the COVID-19 pandemic” with additional monthly compensations for each preserved job in the “Transport”, “Hospitality and Restaurant Industry” and “Tourism” sectors • “Keep Me +” since October 2021 provides support for overcoming the consequences of the crisis caused by the COVID-19 pandemic and for preparing for an ecological, digital and sustainable recovery of economy 	<p>Budget is provided to compensate employers from the sectors of transport, hospitality and restaurants, intermediary activities, etc. Compensations are in the amount of 60% of the worker’s insurance income. Over 30,000 tourism jobs have been preserved by the end of 2020.</p> <p>BGN 50 million has been provided for priority support for employers from the “Hospitality and Restaurant Industry” and “Travel Agents and Tour Operating Activity” sectors, as well as other activities related to travel and reservations.</p> <p>A total of BGN 80 million has been provided, as of July 2020 until the end of 2021 compensations were paid to 2,942 employers and self-insured persons to preserve the employment of a total of 42,250 workers and employees.</p> <p>As of January 2022, a total of 25 applications from the tourism sector are submitted, of which 21 applications from employers – for compensation of 40 employees and 4 applications from self-insured persons.</p>
B. Specific policies and measures for individual tourism sub-sectors				
3.	Financial difficulties of tour operators	Policy regarding tour operators’ liabilities to tourists through legislative decisions	<ul style="list-style-type: none"> • Postponement of refunds for trips canceled due to the state of emergency up to one month after the state of emergency; subsequently extended to 12 months from the date of the canceled trip within 2020 	<p>The legal evaluation of the policy and the measures implemented by the executive and legislative authorities regarding the liabilities of tour operators to tourists is positive, as it provides:</p> <ul style="list-style-type: none"> • protecting the health of tourists; • the guarantee of their rights; • solving the problem of financial difficulties of tour operators.
<ul style="list-style-type: none"> • Awareness campaign by the Ministry of Tourism to reach agreements with travelers, by: 1) negotiating a change in dates, possibly routes, the method of travel, and other elements of the trip; 2) concluding a substitute contract for a tourist package of the same or higher quality; 3) issuance of a voucher for the pre-paid amount by travelers, with the option of full refund if the voucher is not used <p>Instructions of the Ministry of Tourism dated 24.03.2020 have been prepared, based on the EC Information on the Package Travel Directive in connection with the COVID-19 from 09.03.2020.</p>				

	Policy on ensuring liquidity of the intermediary sector in tourism through grants	<ul style="list-style-type: none"> • Grants for tour operators and travel agencies to cover the current needs and for operating capital, the value of which is calculated in the value of the tour operator/travel agency service provided • Scheme of state aid to tour operators to refund the amounts due to customers for trips not made in the period 01.03.2020 to 31.12.2020 due to COVID-19 pandemic • A tour operator-only grant scheme for reimbursing customers for trips not completed due to COVID-19 during the period from 01.03.2020 to 31.12.2020 • Temporary grants to provide operating capital for tour operators conducting organized tourist trips with charter flights to Bulgaria in the amount of EUR 35 for each seat of the maximum passenger capacity of the plane 	<p>By April 2021, a total of 597 enterprises have been approved to receive financial assistance, with grants paid in individual amounts totaling BGN 34.5 million.</p> <p>In September 2021, 89 applications for state subsidies with a total value of BGN 11.3 million were approved.</p>
Policy to enhance inbound tourism through state aid for air charters		<ul style="list-style-type: none"> • A tour operator-only grant scheme for reimbursing customers for trips not completed due to COVID-19 during the period from 01.03.2020 to 31.12.2020 • Temporary grants to provide operating capital for tour operators conducting organized tourist trips with charter flights to Bulgaria in the amount of EUR 35 for each seat of the maximum passenger capacity of the plane 	<p>Through the updated State Budget for 2021, an additional BGN 6 million is planned.</p> <p>- 1st phase – from 13.03. 2020 to 31.12.2020 – BGN 55 million or 795,000 foreign tourists are planned; - 2nd phase – from 01.01.2021 to 31.05.2022; - 3rd phase – from 01.06.2021 to 14.05.2022.</p>
4. The low occupancy rate of the accommodation facilities	Policy to support domestic tourism	<ul style="list-style-type: none"> • One-time assistance for the use of tourist services in local accommodation facilities in the amount of BGN 210 for front-line medical staff • „Together Again“ national program for school pupils, valid until 14/09/2022. 	<p>93 publicly owned establishments are preferably included but all officially categorized accommodation facilities are eligible.</p> <p>Funds from the state budget are provided for tourist trips of 30,000 students in the form of 6-day packages offered by tour operators, worth BGN 500 each, including transport, insurance, meals, and accommodation, as well as a cultural program. As of September 2021, the Ministry of Education and Science has approved applications worth 12.4 million, with more than 330 accommodation establishments supported.</p> <p>In the state budget for 2022, BGN 1.2 billion is provided for food vouchers to 500,000 employees. It is expected that about 1/5 of the money will be used for tourist services.</p>

№	Problems	Policies	Measures	Scope
5.	Lack of employment and financial difficulties for tour guides	Policy to support tour guides through financial compensation and support	<ul style="list-style-type: none"> Financial compensation of licensed tour guides and mountain guides under the project „Increasing the capacity of SMEs in the tourism sector by providing support for the establishment and operation of the regional DMOs” Campaign to popularize little-known places and tourist sites in Bulgaria, professionally presented by tour guides for a fee Financial support for tour guides and mountain guides 	Contracts were concluded with 4 branch organizations of guides, with a total value of BGN 3 million. The delay in the implementation of the measure was due to the need to specify the financing mechanism in compliance with EU rules. A contract was signed with the Ministry of Tourism for BGN 30,000; over 2 million people, half of them foreigners, have watched the promotional videos. With the update of the state budget in July 2021, BGN 4 million were allocated, but not paid. It applies to restaurant and catering services related to on-site consumption and the delivery of food; from 01.08.2020 it is also introduced for beer and wine, as well as for general tourist services and organized excursions.
6.	Financial difficulties of other tourism subsectors	Policy to support other tourism activities through tax relief, reduction of fees, rents, and concession fees	<ul style="list-style-type: none"> Introduction of a reduced VAT rate of 9% (on a standard rate of 20%) from July 1, 2020, to December 31, 2021 Exemption from paying the tax for household waste Reduction or remission of rent payments when using state or municipal properties 	It refers to individuals and enterprises which, because of the state of emergency, have suspended their economic activity carried out in municipal property. Applies to individuals and legal entities – tenants or users, who have limited or suspended their activities in the property during the state of emergency
7.	Risk to the health and safety of tourists and tourism employees	Policy for health and safety environment for tourists and tourism employees	<ul style="list-style-type: none"> Reduction in beach concession fees, as well as postponement, reduction or redirection of part or all the investments under the concession contract Guidelines for the operation of accommodation, catering and entertainment establishments in the conditions of an emergency epidemic situation, which are updated periodically „100% Vaccinated“ sticker for fully vaccinated hotel and catering staff Uniform rules for the application of anti-epidemic measures in tourist activities’ supply during the active summer and winter seasons Safe Travels Stamp, issued by the World Travel and Tourism Council (WTTC). 	A 50% reduction is enforced provided that lower prices for beach accessories are introduced. Concessionaires and tenants of 56 sea beaches have submitted applications for fee reductions for the summer season of 2020. 17 updated versions of the Guidelines for functioning of accommodation establishments and food and entertainment establishments in the conditions of danger of Covid-19 infection in Bulgaria No available information about the number of facilities awarded with the sticker. Orders with Rules for the implementation of anti-epidemic measures at tourist sites and in carrying out tourist activities during the 2021 summer season and winter season 2021/2022. In December 2020 Bulgaria was awarded the Safe Travels Stamp by the WTTC.

**The presented information and data are obtained from the documents listed in Appendix 1.*

The initiated policies and implemented measures fall into two main groups. The first one comprises those policies and measures intended to address all tourism sub-sectors, coping with the general problems related to the financial difficulties of tourism enterprises and the thread of losing workforce. To tackle the financial problems gradually three policies were applied, starting with the policy for financial relief of tourism enterprises through rescheduling and refinancing of loans, followed by the policy of financial support through grant schemes for losses compensations and liquidity, especially for small enterprises. Finally, the policy for recovery and resilience was enforced through the incorporation of tourism in the National Recovery and Resilience Plan and other operational programs. The introduced policy to preserve jobs and promote employment included financial support and compensation for employers to keep and/or reintegrate staff. Thus, the country responded to the call of UNWTO and tried to implement the recommended strategies presented above.

The second group comprises more specific policies and respective measures, targeted at mostly affected sub-sectors. Great efforts were made to support the intermediaries (tour operators and travel agents) and the developed policies were oriented to solve their problems with liability, liquidity, and the demand for inbound tourism. The restaurant and catering sub-sector made use of the specially reduced VAT from 20% to 9%, while the accommodation sector got the least special support using food vouchers for payment of tourist services and paid vacations for medical staff and school pupils. The freelancers (tour guides) could not be adequately supported – although funds were allocated a proper mechanism in compliance with EU rules could not be found.

Different measures were implemented as part of the policy for the health and safety of tourists and tourism employees. Specially developed guidelines and uniform rules for operation and activities were introduced and regularly updated, and due to the multi-directional effort of the tourist authority, the country acquired the international Safe Travels Stamp as early as 2020.

CONCLUSION

Tourism was among the first sectors affected by the COVID crisis in Bulgaria. The initial effect was so strong that it cast doubts on the survival of tourism businesses. All presented policies and specific measures had a short- and medium-term horizon and were mostly aimed at retaining the economic vitality of tourism intermediaries, accommodation, and catering establishments, as well as at preserving jobs and the income of the employed in tourism. This predetermined the urgency of the measures and their correct addressing. The delay in time, complicated procedures, and the pile of required documents were among the most frequent criticisms of public authorities when implementing the measures. Regardless of the mentioned weaknesses, the state allocated significant financial resources, most of-

ten in the form of state aid, to support tourism businesses – over BGN 150 million (EUR 75 million). Financial aid was received by over 6,700 tourist enterprises and roughly about 50,000 jobs were preserved. Despite the temporary suspension of some tourism businesses, mass bankruptcies in the sector were prevented.

Regarding future activities to support tourism resilience, the following can be indicated:

- Updating the National strategy for sustainable tourism development with a focus on recovery, restructuring, and digitalization; a differentiated approach to the tourism sub-sectors could also be appropriate.

- Stimulating incoming tourism, through active promotion abroad and continuing support for internal tourism.

- Discussing and introducing a new system of financial guarantees for the protection of tour operators and users of their services.

- Revision of corporate policy on pay, career development (including training), and retaining of tourism industry employees.

- Timely access of tourist enterprises as eligible beneficiaries to the measures of the National Recovery and Resilience Plan and the operational programs under simplified procedures.

In this context, one more problem should be emphasized, which is not specific only to Bulgaria. During the pandemic in 2020-2022, tourism enjoyed an unprecedented scale of state aid, which business entities quickly got used to and which will be difficult to give up. One of the most serious challenges in the medium term will be finding an appropriate exit strategy from the support regime.

The current study helped to outline the framework and the scope of the public interventions in the tourism sector during the COVID-19 pandemic in response to the dramatic negative impact and in support of the resilience of tourist enterprises, simultaneously revealing the increased role of the state. Worth mentioning are some of the limitations of the research. First, the effect of the pandemic was assessed only in the first stage, while following the dynamics of the disease there were some fluctuations in the tourist flows, the affected regions, and sub-sectors, that are not taken into consideration. The lack of timely and reliable statistical data for all tourism sub-sectors could also be regarded as a limitation. On the other hand, the risk that some of the information on policies and measures may not have been made public and therefore not accounted for in the research should not be overlooked.

Addressing the challenge of future tourism policy design and implementation requires an evaluation of the impacts of past policies. The findings could serve as a basis for further comprehensive, in-depth, and evidence-based impact assessment of the elaborated and implemented policies and respective measures related to the COVID-19 pandemic. For this purpose, it is advisable to apply two complementary approaches (European Commission, 2013, pp. 47–50):

- 1) Counterfactual impact evaluation – to reveal in quantitative dimensions what would have happened to beneficiaries in the absence of the intervention, and im-

fact is estimated by comparing counterfactual outcomes to those observed under the intervention thus answering the questions “Does it make a difference?” and “Is the difference observed in the outcome after the implementation of the intervention caused by the intervention itself, or by something else?”;

2) Theory-based impact evaluation – to reveal why a set of interventions produces effects, intended as well as unintended, for whom and in which context, i.e. to produce a narrative providing insights into why things work or don’t thus answer the question “how things should logically work to produce the desired change?”.

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- Ministry of Tourism. The Ministry of Tourism confirmed the guidelines and opened for applications the scheme for providing grants worth up to BGN 30 million for the tourism sector. 19.11.2021, <https://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-utvurdi-ukazaniya-i-otvori-za-kandidatstvane-shemata-za> [accessed on 28.03.2023]
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- Ministry of Tourism. The Ministry of Tourism firmly believes that restrictions due to the pandemic in the Tourism sector must be tied to clear economic measures. 20.08.2021 <https://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-kategorichno-schita-che-ogranicheniyata-zaradi> [accessed on 28.03.2023]
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- Ministry of Tourism. The Ministry of Tourism has started accepting applications at SUNI for the second phase of the state aid scheme for 35 euros. 04/02/2021, <https://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-startira-priemna-zayavleniya-v-suni-po-vtorata-faza-na> [accessed on 28.03.2023]
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- Ministry of Tourism. The Ministry of Tourism made a fifth payment in the amount of over BGN 3.139 million to tour operators and travel agents from the state subsidy allocated to the sector. 04/05/2021, <https://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-napravi-peto-plashtane-v-razmer-na-nad-3139-mln-lv-na> [accessed on 28.03.2023]
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- Ministry of Tourism. The Ministry of Tourism offers beach renters the option of a 50 to 100% discount on the prices of umbrellas and sunbeds for summer 2021. 05/27/2021, <https://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-predlaga-i-na-naematelite-na-plazhove-vuzmozhnost-za> [accessed on 28.03.2023]
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- Ministry of Tourism. The Ministry of Tourism prepared and agreed with representatives of the organizations of the tourism business project of a state aid scheme worth BGN 30 million, according to Art. 1, para. 5, item 9, b. c) from the Law on the State Budget of the Republic of Bulgaria for 2021, 29.10.2021, <https://www.tourism.government.bg/bg/kategorii/novini/ministerstvoto-na-turizma-izgotvi-i-suglasuva-s-predstaviteli-na-organizaciite-na> [accessed on 28.03.2023]

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Ministry of Tourism. The National Tourism Council adopted the Annual Program for National Tourism Advertising 2022. 28.10.2021, <https://www.tourism.government.bg/bg/kategorii/novini/ministur-baltova-po-vreme-na-zasedanieto-na-nacionalniya-suvet-po-turizum-v> [accessed on 28.03.2023]

Ministry of Tourism. The Parliamentary Committee on Budget and Finance and the Committee on Tourism accepted at first reading the recovery of state aid of 35 euros per seat for charter flights. 27.01.2022, <https://www.tourism.government.bg/bg/kategorii/novini/parlamentarnata-komisiya-po-byudzheta-i-finansi-i-komisiyata-po-turizum-priehta-na> [accessed on 28.03.2023]

Ministry of Tourism. The submission of applications for state aid of 35 euros per seat for tour operators has started. 30.03.2022, <https://www.tourism.government.bg/bg/kategorii/novini/startira-podavaneto-na-zayavleniya-za-durzhavna-pomosht-ot-35-evro-na-sedalka-za> [accessed on 28.03.2023]

Ministry of Tourism. The third phase of the aid of €35 per seat to obtain a state subsidy begins. 23.07.2021, <https://www.tourism.government.bg/bg/kategorii/novini/zapochva-treta-faza-na-pomoshtta-ot-35-eu-na-sedalka-za-poluchavane-na-durzhavna> [accessed on 28.03.2023]

Ministry of Tourism. The third state aid measure to support tour operators in returning sums to customers has been launched. 04.02.2022, <https://www.tourism.government.bg/bg/kategorii/novini/startira-tretata-myarka-za-durzhavna-pomosht-za-podkrepana-turoperatorite-za> [accessed on 28.03.2023]

Ministry of Tourism. Today, contracts were concluded with the selected contractors for the 4 separate positions under the tour guide support scheme. 27.07.2021, <https://www.tourism.government.bg/bg/kategorii/novini/dnes-byaha-sklyucheni-dogovori-s-izbranite-izpulniteli-po-4-te-obosobeni-pozicii-po> [accessed on 28.03.2023]

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