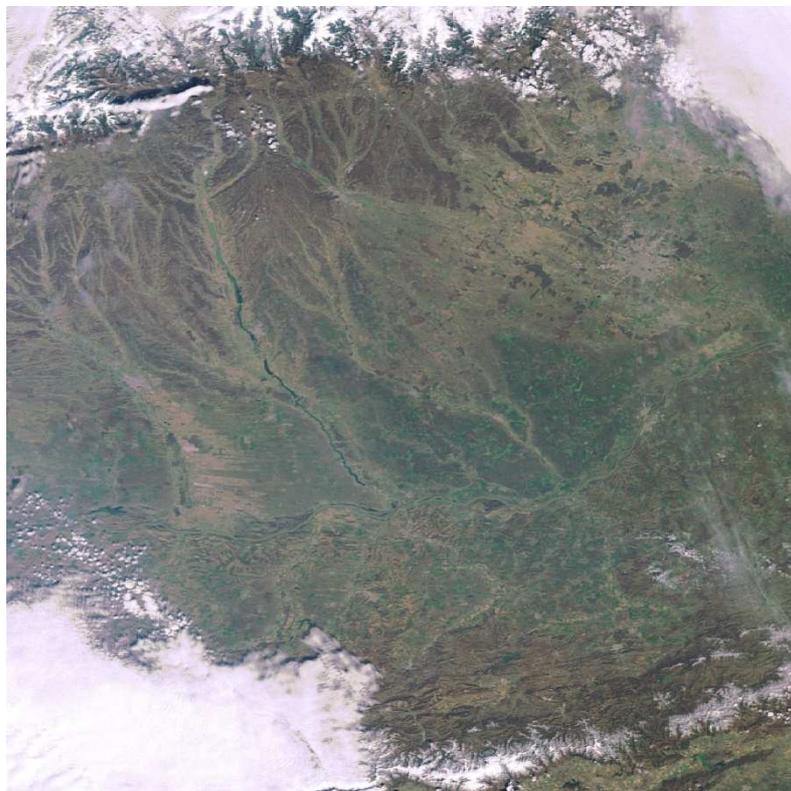




# **DATOURWAY**

## **Transnational Strategy for the Territorial Development of the Danube Area, with special regard to Tourism**

### **SYNTHESIS**



February, 2011.



## CONTENT

<b>I. Macro-regional relations</b> .....	3
I.1. Position of the DATOURWAY area .....	3
I.2. Spatial structure, settlement system .....	5
I.3. Dominant characteristic features of the urban network of the DATOURWAY region.....	12
I.4. Danube related development concepts of the partner states.....	14
<b>II. Synthesis of the national analyses</b> .....	18
II.1. National tourist development concepts, programs .....	18
II.2. Vision, expectations from the DATOURWAY project .....	22
II.3. Social resources .....	25
II.4. Natural endowments, state of the environment .....	30
II.5. Economic characteristics, with special regard to tourism.....	41
II.6. Infrastructure .....	45
<b>III. Potentials, initiatives and actual tourist uses in the DATOURWAY area</b> .....	54
<b>IV. Conflict areas</b> .....	66
IV.1. Conflicts between tourism and the state of the environment .....	66
IV.2. Inadequacies in the relations between tourism and human resources .....	69
IV.3. Infrastructural barriers to tourism development.....	70
<b>V. Basic elements for the joint tourism strategy in the DATOURWAY area</b> .....	72
V.1. SWOT.....	72

## I. Macro-regional relations

### I.1. Position of the DATOURWAY area

The DATOURWAY region is a corridor along the middle and lower sections of the Danube, in Central and Southern Europe, in the south-east part of the European Union, in the territory of six countries. The area of planning is constituted by the counties along the section of the Danube entering at the Devin Gate (*“where the murky foams of the Morava pour into the Danube” – Fényes Elek*) and ending at the Black Sea river delta (NUTS 3).



The part of the region starting at Bratislava, the capital of Slovakia, follows the W – E course of the river. The part located north of the border river is Žitny ostrov, the plane cuddling up to the hillsides of the North-West Carpathians (the most important agricultural area of Slovakia); south of it is Szigetköz; in the west, Kisalföld joins the Sub-Alps; in the south and east, the mountains of Dunántúli-középhegység. After the large bend the Danube takes a north-south direction, the river continues along the Great Hungarian Plain area to the east, and on the western side it is accompanied by a hilly country, then the Mecsek Hills. The plains in Hungary are Mezőföld and Kiskunság, then the Bačka loess table, belonging predominantly to the Serbian Vojvodina; this constitutes. The Danube–Drava region is the landscape-forming element of the western part of the triple Hungarian–Croatian–Serbian border. On the east side – on the Bačka, then the Banat area – the Danube again gradually takes a westerly–easterly course (with north – south bends). Iron Gate, made by four



interconnected passes, constitutes a major part of the natural border between Serbia and Romania (the Serbian and Romanian section of the Lower Danube). In the territory of Romania, at the foot of the southern Carpathians the Danube continues again in a westerly–easterly direction, through a wide valley. The Danube, which is here the border river between Romania and Bulgaria, then flows to the north, as far as the extensive delta region ending at the Black Sea, also stretching over to the territory of the Ukraine.

The region is an interwoven series of various landscapes, with special, high-value nature areas, starting from Szigetköz, and the steep hilly country of the Danube bend, through the Kiskunság sand ridge, the Trans-Danubian hilly country and the spurs of Mecsek, to the Danube-Drava region, through the Iron Gate, through the valley of the Lower Danube surrounded by irregular water courses, waterfalls and cliffs, to the delta area.



***Hungarian Danube section***

### ***1.2. Spatial structure, settlement system***

The River Danube, the dominant element of the spatial structure, establishes a macro-regional connection of the affected territories of the six countries. In spite of this, it plays the role of a divider rather than a connector in the life of the regions of the area. Along the common section of Slovakia and Hungary, the Danube is a border river, constituting the main axe of the area of Hungary; but outside the metropolitan region of the capital, in all the relevant NUTS2 and NUTS3 regions, the Danube is the border of the regions and the counties; due to the limitations of contact (the lack of bridges) territorial development is not oriented in the direction of the Danube. The spatial structural role of the Danube is different in Serbia – it links significant cities: Belgrade, Novi Sad, and Smederevo; then, at the Lower Danube segment, from the narrow cross-section of the connection, the Iron Gate became the focal point of energy production and navigability starting in 1972. From then on, the Danube has been a border river between the countries, across which at present only one single bridge establishes a connection between two countries, Bulgaria and Romania. This contradictory, connecting and at the same time separating- role of the Danube greatly influences the spatial structure of the area.



***Bratislava***

The spatial structure and settlement system of the two capitals, Bratislava and Budapest, with their urbanised zone, dominating this section of the Upper Danube, show several similarities. The dominance of the two big cities, their regional and urban development



effect, is enforced on both sides. Together with the strengthening of the sub-centres of the urbanised zone, the emergence of conurbations and its effect of mobilising the extensive area are well visible. The directions of the relationships are different. The area of Bratislava, and the spatial structure of **Slovakia**, stretches towards the west–north-west, though the effects of southern expansion – crossing the country border, running as far as Mosonmagyaróvár – are already making headway. The relationships within the country, with an eastern orientation (towards Nitra, Nové Zámky) are looser.

In the **Hungarian** territory the extensive agglomeration of the capital also has outstanding significance and its effect of mobilising its wider environment, the central area of the country (extending from Székesfehérvár through Esztergom, Vác, Hatvan and Kecskemét) is similar, or even greater. At the same time, the north-western part of the country, with Sopron and Győr as its centre, is the other active, developing area, with connections stretching across the country borders as well. In this Bratislava–Budapest region the Danube, in spite of all the political conflicts, is an important participant of cross-border connections. The material manifestation of intensive relationships is the Slovak construction of flats in Rajka, the connections of border cities Komárom–Komárno, the organised transportation of the labour force in Tatabánya, and the bridge between Esztergom–Párkány, reconstructed in 2001.



*Esztergom and the Mária Valéria bridge*

The spatial relationships of the Budapest agglomeration are not homogeneous either. The connections and the mobilising effects are strong in the western, north-western, northern



and north-eastern directions and somewhat milder towards the south – both in the Great Plain and on the Trans-Danubian side; this latter is related to the southern expressway connection, missing until the most recent times, and the undependable railway connections. This is also the reason for the development of the region along the Danube, south of Budapest, being focussed on the larger cities and their regions at a distance of some 40-60 km from the river (Székesfehérvár and Pécs in the Trans-Danubia, Kecskemét on the Great Plain). The area between the river and the urban concentrations comprises agricultural areas and territories of nature protection, with larger and mostly smaller towns along the Danube. The connection between the two sides of the river is served by three bridges without, however, appropriate railway and express-way connections.

On the other side of the southern border of Hungary the geographical unit of the Baranya hilly country continues on the Trans-Danubian side, in the area of **Croatia** (Osijek-Baranya and Vukovar-Srijem). Here the significant centre is Osijek, a centre of five counties known as the historical region of Slavonia. Osijek is a university town and traffic junction. As the result of the development of the areas along the border and the inter-city connections and co-operations, it could be the twin city of Pécs (itself a regional centre on the Hungarian side). There relations are advancing and deserve the furthering of this process. The surrounding area is mostly agricultural area with sub centres Vinkovci and Vukovar as well as several minor towns.



***Danube – Drava confluence***

On the Great Plain side, the agricultural area continues in Western and Southern Bačka, Central and Southern Banat and Sremski in the area of **Serbia**, with a more modest economic

significance but more dynamic small towns open for cooperation (Sombor, Zrenjanin, Sremska Mitrovica), as well as significant urban concentrations (Temerin, Novi Sad). In this area population is rather unstable, exposed to in and out migration flows. The capital Belgrade is a one million agglomeration, and still an outstanding junction from economic, transport, commercial and cultural aspects as well. In the south and east, the capital is followed by a depression zone variegated by the chain of attractive landscapes, as well as the beautiful stretch of the Lower Danube mountain range.



*Sremski Karlovci*

The Lower Danube is a border river between Romania–Serbia and Romania–Bulgaria.

In the area of **Romania**, as far as the large river and sea port, the zone along the Danube is a depressed area, with sparsely inhabited, small settlements. At the same time, given the entirety of the extensive region, the off-river territory comprises 5 of the 10 most significant cities of Romania; among them are Bucharest, the capital, with 2 million inhabitants, as well as Constanta, Craiova, Galati and Braila. From among them Bucharest and Craiova are located far from the river alley, rather turned away from that; Constanta is a sea port, and Galati and Braila are river ports close to the delta. Turnu Severin, of historical importance, is also a city with a population of the order of one hundred thousand, and the city of the large

hydro-power-plant. Close to 70% of the population of the area live in 6 cities, each with a population over one hundred thousand, while the extended provincial zone is sparsely inhabited and of a decreasing population.



In the Romanian part of the target area the urban system is by all means dominated by Bucharest the capital city and its large urban region. Though situated off the river of Danube, it has far reaching influence as the national capital and as an international metropolitan centre and also as a transport node with its multiple connections on the river and its tourist zones. The other major urban pole is the Braila-Galați urban region, a large centre of multimodal transport, industrial concentration but also essential for tourist development. The big cities, especially the capital and the port cities, have multiple and far-reaching connections; however, this has only a limited effect on the provincial area, and namely on the area along the Danube. Cooperation is manifest across the border but this is restricted mostly to the cooperation between small cities, namely, between Giurgiu and Ruse, where the only bridge of the area connects the right and left banks.

In the area of **Bulgaria**, of Dunavskata ravnina, the undulating Danubian plain cuddles into Stara Planina on the northern side of the Balkan Mountains. It is an arable agricultural area, which, similar to the area on the other side of the Danube, is of a somewhat peripheral situation in the national spatial structure.



The westernmost city of the area is Vidin, rich in medieval monuments, with a population of 60 thousand, where the construction of the Danube Bridge is foreseen. Pleven and Ruse constitute concentrations of 100 thousand: the economic centres of Northern Bulgaria with a rich historical–architectural heritage. Silistra, the settlement along the bank of the Danube, with a population of 50 thousand, is the economic and travel intersection of the north-eastern part; it also has a significant historical heritage. The environment of Srebarna-lake, located in its vicinity, is a famous bio-sphere reservation.

The more vivid small settlements and towns of the Bulgarian Danube Plain, rich both in landscape and historical values, form an interconnected chain, a populated space of life at the foot of the Balkan hills.



***Danube Delta***

Finally, the delta area of the Danube: water transport, related industry and services, as well as, starting from the city of Tulcea, the delta region, the gradually changing and expanding natural scenery, the coexistence of biological, historical and ethnical diversity – where nature protection gaining international fame and classification – all have become dominant in the use of land and the landscape.



**SOUTH EAST EUROPE**

Transnational Cooperation Programme



**DATOURWAY**



Programme co-funded by the EUROPEAN UNION



### HIERARCHY OF SETTLEMENTS





### ***1.3. Dominant characteristic features of the urban network of the DATOURWAY region***

- Common cultural heritage, multilingualism: community in diversity  
 During the course of past centuries a significant part of the territories along the Danube belonged to large-sized empires of several nationalities (the Hapsburg Empire and the Ottoman Empire). The river itself functioned as a connecting link between both large historical and cultural structures, and established a unique cultural and linguistic Danube identity based on port cities. The Central European and Balkan elements appeared everywhere in the lives of the cities, though in a unique manner, and to different extents; thus the cultural connecting links remain alive as of today. The urbanisation processes of the past century naturally undermined and damaged the traditional cultural milieu. However, its traces can still be found in architectural mementoes, traditions, identities, etc. In several places these monuments are revived and made a part of settlement development.
  
- Similar paths of economic, urban development (commerce, then industrial cities, centres of higher education)  
 We can see parallels in the development process of cities along the Danube, as well. Earlier, their development was based on trade, then on industry (Győr, Novi Sad, Pančova, Ruse, Galati, etc.). The relationship, the cultural and urban network historical connection, can be traces in the medium-sized industrial cities along the Danube.
  
- Bridge cities: points of crossing established during the course of history, network junctions  
 The outstanding centres of development in the individual countries and regions are the bridge cities, which, owing to their traffic situation, always attracted the drivers of development. Obviously, this manifested itself in different forms from age to age: seats of dioceses, trade centres, then industrial and logistical centres.  
 They are outstanding crossing points of the transport network of the individual countries even in those places where, at present, the river manifests itself as an obstacle to be overcome.  
 National and large-regional junctions also formed at the places of crossing (Bratislava, Budapest, Belgrade), with significant economic growth. From the gross value produced/employment in the area, etc., a significant proportion belongs to the large agglomerations and urban concentrations along the Danube.
  
- Border cities, city pairs – the division of functions, agglomerations expanding across borders  
 In the 20<sup>th</sup> century the Danube, flowing within the former empires, became a border river along increasingly longer sections. This “border formation” was completed in the Balkan wars of the nineties (Croatian–Serbian border). Several cities on the



riverbank lost their agglomerations on the opposite bank and their systems of connections.

Where the river is a traditional border river (especially in the southern sections) pairs of cities (pairs of forts) standing opposite each other emerged. The cities and towns along the southern section of the Danube there are several twin cities or pairs of cities in Romania and Bulgaria nearly facing each other across the river Târgoviște (RO) - Targovishte (BG), Calafat (RO) - Vidin (BG), Turnu Măgurele (RO) - Nikopol (BG), Zimnicea (RO) - Svishtov (BG), etc. Their proximity and complementarities need to be given more value and their cooperation should be promoted (transport links, joint programs etc.).

In the northern section, where the Danube was an inland river for a long time, agglomerations stretching out to both banks emerged especially in the case of the bridge cities. In these cases, the axe of the spatial structure was constituted by the river. By the drawing of the borders, the relationships ceased to exist, but with the increase of permeability, they have revived again. The cities along the Danube were in the forefront of the reorganisation of functional co-operations. An excellent example of this is the cooperation of Komárom/Komárno, as well as the Ister-Granum Euroregion, organised on the traditional agglomeration of Esztergom — one of the main purposes of which is to make the “use” of the city stretching across the border easier.



#### ***1.4. Danube related development concepts of the partner states***

- **The development of agglomerations and cities along the river**

These regions are the centres of economic dynamism in the Danube basin. A significant reason for their development was the waterway of the Danube. Part of this is the Vienna–Bratislava pair of cities (stretching over borders not only in the direction of Austria and Slovakia but Hungary as well); Budapest and its agglomeration from Esztergom as far as Dunaújváros; the inter-connected Pécs – Osijek region, the Novi Sad–Belgrade–Pančova agglomeration; the Bucharest–Giurgiu, and Galati–Constanta development axis, as well as the Braila–Galati potential conurbation, which in the long run may also integrate the neighbouring Moldavian areas (Giurgiulesti) into itself.

Even these days these regions are the development centres of the Danube valley; they are able to take in the elements of the new economy and the capital arriving from the outside in the fastest and most effective way. The Danube as a waterway can contribute to the present basis of their economy only indirectly, as its composition is not characterised by the dominance of branches with (water) transport demand any more; the port capacities built in the inside of the new agglomeration often cannot satisfy the new logistical tasks; therefore, their relocation is needed, which often takes place not along the Danube and not connected to water transport. At the same time the river may contribute to the improvement of the quality of life of the agglomerations, thus to their attractiveness as well.

In connection with the river, the task of city planners increases; the cities are “turned towards the river” by the establishment of inner city promenades and recreational areas close to the inner city, the re-launch of passenger shipping, the reorganisation of former or outdated port infrastructure for small boat and yacht transport, by reinforcing the symbols of the Danube. In many places this was embodied in the form of special city development programmes as well (Bratislava), and it appears at least in the plans communicated (Budapest): these are primarily city development programmes with a Danube orientation, environmental protection (channelling, sewage treatment), tourism and recreational plans. An interesting development is that, for the solution of the transport problems of big city agglomerations, suggestions encouraging the development of water transport appeared. Such were drawn up in Budapest and Győr as well, but the plan of the boat service connecting Bratislava with its agglomeration along the Danube, burdened from the aspect of transport, approached realisation. There has been a speedboat service between Vienna and Bratislava for years. This method of transportation means a real alternative in both directions (both in access time and price) as opposed to land transport.

At present, in addition to the absolutely necessary environment protection investments in the urban spaces with the Belgrade, Bucharest, Galati centre, are the plans of the development of the basic infrastructure, which may promote the connections among the



cities to develop jointly. In the south agglomeration development, it is mostly the Belgrade–Pančova pair of cities that is the most ahead. A connection with respect to Bucharest–Giurgiu has also started, and, thanks to the public road connection between the two cities being of a better quality now than before, the emergence of an economic agglomeration has started; however, those fast residential and work-place suburbanisation processes that helped the growth of upstream agglomerations are still absent here. With the improvement of the transport possibilities around the Romanian capital, this may take place quickly.

The spatial connection of the Braila–Galati pair of cities, and its development to a close-to-one-million conurbation, is an ambitious urban development plan. The basis of this is constituted by the location close to the sea and the industry of the cities, while the establishment of a regional airport could also serve the nearby areas of three bordering countries.

The smaller towns located along the Danube, which earlier had port and industrial functions, are facing different developmental possibilities. The port function has deteriorated almost everywhere, at least with respect to its volume; it is far from the level that secured the significance of these cities in the past. This can be traced back to the disintegration of the Soviet Union and its sphere of interest and the embargo introduced because of the Yugoslav wars; but the irrevocable blow was brought by economic restructuring, which eliminated or cut down the economic background of the port based on industrial and agricultural shipping. Indeed those cities that are located close to some larger agglomeration are lucky; thus they could replace their outdated industrial role, established on a historic scale, during the course of Danube trade and industrialisation. A typical example of this is Győr, Vukovar, Novi Sad and Ruse, which used to be trade cities, then industrial centres. By today, their industrial role has been modernised, thanks primarily to their location and traditions; and, in addition to this, they have become provincial centres of education or maybe of science, thanks to their economic development, quality of life and accessibility based on the Danube. Though its historical background fared differently, thank to its location, Dunaújváros also belongs to this group.

The largest setback was suffered by those Danube cities which are industrial centres, established in the rural spaces, characteristically during socialism; they were left out of agglomeration and developed in an isolated fashion. They experienced a drastic decline (with the exception of centres with power plants established along the river, like Paks, Cernavoda). Several such declining, former industrial and port cities can be found along the Serbian, Romanian and Bulgarian sections of the riverbank (Vidin, Lom, Svistov, Silistra, Calaras, etc.). Few references are made to their development; the utilisation of their industrial areas is hard to resolve. Their areas are usually discussed in the environmental protection concepts. Some of them can find ties to the agglomeration of regional industrial centres further away from the river (e.g. Craiova, Pleven), as areas



providing a labour force and recreational area, perhaps as port capacity, but at a significantly lower volume than in earlier times.

– Direct shipping routes, the development of logistical centres on a port base

The development of shipping routes is treated by every state as an international obligation. This means the development of the conditions of shipping along specific river sections. No large, structural-level investments are foreseen in the plans. Thus, for instance, the construction, and together with that, the dam plans of the Bulgarian-Romanian power plant dreamt up during socialism, do not even appear in the new documents. The significant logistical investments are related to the large metropolitan regions. Thus, in the case of Bratislava, the construction of a ring-road around the city from the east, and a bridge, and the establishment of the logistical basis for this is to be expected. There are similar development plans with respect to Belgrade as well, while in the case of Bucharest, the construction as well as completion of the Danube-Bucharest channel has emerged once again.

The improvement of port infrastructure is to be counted on in the case of Komárom (by the relocation of the port into the Vag delta), as well as Giurgiu, Ruse and Galati. There might be smaller developments in the case of Vidin and Lom as well. Those ports that are suitable for the handling of goods trade arriving from the Black sea or the Rheine, for the establishment of multi-modal logistical centres come into the forefront (e.g. Galati, Giurgiu, Novi Sad, Dunaújváros, Győr/Gönyű). The development of these is considered in the national plans of the individual countries.

– The development of indirect transversal networks, the establishment of naval connections

The demand for the development of the large European transport corridors, characteristically spanning the Danube, appears in an emphatic form in the plans. Obviously, the European preferences also strongly support the reality of financing, but they also serve national interests. The outdated nature of basic rail and road infrastructure also turn the development efforts of the individual states in this direction. With respect to the Danube, these developments are manifest primarily in the issue of the location of the bridges, as well as the possibilities of the multi-modal connections of river shipping.

The European policies have elevated the issue of the location of bridges to a geo-political level, and, side by side with the interests of the territories and regions along the river, they serve the management of large, European currents, especially where permeability is bad (Hungarian-Slovak and Bulgarian-Romanian sections).

Transversal developments have an outstanding significance with respect to the development of the region along the Danube and the future of the utilisation of the capacity of Danube shipping where the areas along the Danube are in an especially bad transport and accessibility situation, namely along the common Bulgarian-Romanian



section. The Bulgarian developments mean especially important connection points, as the transport relationships of the country towards the neighbours are outdated, thus weakening the south-east connections of the whole Union. Thus these get preference in the developments. At the same time, the construction of the north-south connections serving the establishment of the links between the Danube ports and the ports of the Aegean Sea have fallen behind on a historic scale, which will be somewhat made up for by the construction of the Vidin bridge and the infrastructure leading to it, which, through Sofia and the Struma-valley, will improve the access to Greece. According to the Bulgarian opinion, this element will also improve the south-east European applicability of the Danube-Main–Rheine waterway.



## II. Synthesis of the national analyses

### *II.1. National tourist development concepts, programs*

Tourism is generally recognized to an essential and growing business which contributes to the enhancement of prosperity and overall economic development. Besides growing income potential tourism helps to make the country or region known in other parts of the world, and triggers the development of other businesses. Furthermore, the developments which are indispensable for the attraction of tourists (infrastructure, green open spaces, cultural programmes, knowledge of foreign languages, local awareness) are also useful for the general improvement of the quality of life and for other business developments.

Riverside tourism – riverside walk, bird watching, peddling, jet skiing etc. – is an important element of water based tourism especially in landlocked countries and regions. There are, however, hazards threatening its increasing attractiveness, as rivers are not always dependable, they are liable to floods or low water level and changing course of water flow. Therefore riverside tourism is best developed in linkage with other tourist programmes like cultural activities, horse riding, city tours, sightseeing, thermal bath etc.

All DATOURWAY countries have national tourism strategies and specific strategies for tourist development in the Danube space. What needs, to be further emphasized is the specific tourist potential of the Danube area and the potentials of transnational cooperation providing programs offering a broader variety of activities.

**Slovakia** has a comprehensive national program for the development of tourism in 2008 – 2013 focusing on a broad range of areas including the following:

- Summer tourism and waterside holidays
- Spa and health tourism
- Urban and cultural programs, sightseeing
- Rural tourism, agro-tourism

The concept has defined five specific development objectives:

- Strengthening the position of the tourism sector in the national economy,
- Making Slovakia more attractive as a holiday destination,
- lengthening the duration of tourist visits,
- Improving the visitor structure by providing better quality services,
- Supporting the creation of new employment possibilities especially with high potential for tourism.

The objectives as identified indicate the national economic importance of tourism and the concern for qualitative improvement. The regions have (of Bratislava, Trnava and Nitra in the project area) have specified the national guidelines with respect to their own characteristics. The territorial differences among the regional policies reflect the spatial variations of overall economic and tourist potentials. Whereas Bratislava with its region is the centre of cultural,



business and conference tourism and has further cross-border potentials, the lower Danubian area is rather more of national and regional importance and the further quantitative and qualitative development services and attractions is foreseen in the relevant policies.

In **Hungary** very high importance is attached to tourism and its development in view of the admitted fact that the national potentials of tourism are underused and even underestimated. In terms of tourist attractions and intentions to develop attractiveness, the approach is somewhat similar to the one in Slovakia. The cities – Budapest with its metropolitan region, as well as Győr, Sopron, Székesfehérvár, Pécs and Kecskemét – are designated as destinations of cultural, business, conference tourism as well as offering a broad variety of other – in part supplementary – services.

Outside the urban regions the policies focuses upon the exploitation of local potentials for sports, particularly river-based tourism, country walks, cycling, rural tourism etc. The urgency of the improvement and extension of services is pointed out. This is particularly relevant for the area south of the Budapest metropolitan region.

The improvement of the accessibility to tourist sites is also emphasized in the Hungarian development policy. Particular attention is given in this respect to the development of passenger transport on river Danube. This issue – navigability, development of ports, harbours, and marinas – should be taken on board by the overall DATOURWAY strategy.

Another specific aspect of tourism related policy in Hungary is the priority given to health, medicinal and wellness tourism which is due to the specific potentials in Hungary in this field.

In **Croatia** the National Strategy for Tourist Development (Strategy of Development of Croatian Tourism) focuses on the coastal area, although the potentials of the continental region in cultural tourism, ecotourism, health tourism and business tourism are acknowledged, and the possibilities of the Danube areas for rural tourism, hunting, fishing and various forms of activities in the countryside are highlighted. Nevertheless, no concrete measures are specified at this level. The Regional Operational Programmes (ROPs) for the two Danubian counties give special accent on the development of tourism superstructure and development of various tourism products, especially in Vukovar-Srijem County. The ROPs, however, do not have operational strength and they do not offer efficient mechanisms for project implementation. The spatial plans, which identify zones for certain developments with regulatory force, do not offer strategic approaches and tourism does not play important role in them. Both counties have intended to produce tourism master plans for their areas, but those plans were either not implemented or even accepted in a draft form. Some of the local plans comprise notable statements – protection and enhancement of historic and natural heritage, education and training of local service providers – on tourist development.

The new strategic documents on tourist development of both counties are under preparation.



The Government of **Serbia** in 2005 adopted a strategy for the promotion of tourist development. In this strategy Serbia is identified as a place “Where Danube meets Balkan” and the Danube is attributed with special importance. The Serbian part of Danube catchment area encompasses parts of three clusters of Serbia: Vojvodina, Belgrade and South-eastern Serbia. The following forms of tourism are promoted: business, conference, touring, rural tourism, events, spa and wellness, waterway, mountains, lakes, short breaks.

In 2007 the Government issued 11 plans to estimate tourist potential in detail and to develop tourist infrastructure.

At the level of provinces in the strategy of Vojvodina the focus is upon water tourism based on the Danube and there is emphasis on the development of infrastructure like marinas, bridges, ports, tourist attractions on the water, etc. Furthermore, attention is given to the communities in the vicinity contributing to (though environmental improvement) and benefiting from tourist development. Special emphasis is laid on Gornje Podunavlje, an area with special nature reserve in the western part of county Bačka along the left bank of the river. The area of 1,528 km<sup>2</sup> with centres of Sombor and Apatin is a riparian complex skirted by the Kopački Nature Park in Croatia and the Danube-Drava National Park in Hungary. This as yet internationally unknown territory has a very high tourist potential. Similar is the importance of Donje Podunavlje in eastern Serbia along the river. It is the watershed between the basin Danube and the Morava River basin. In the strategy for rural development (2007-2013) the areas are identified which may be eligible to funds for the development of rural tourism.

In **Romania** the National Tourism Development Master Plan 2007-2026 is an umbrella policy that includes various plans and strategies described in order to optimise the sector’s contribution to the national economy. It incorporates a six year action plan up to 2013. National Regional Development Strategy has identified the development of tourism as a priority.

There are important statements and provisions relating to tourism in the National Spatial Planning Act approved by Law 190/2009.

Regional policy strategies including references to the tourism sector were developed in the majority of the Danubian counties, and some have completed their tourism strategy. At the local level cross-border initiatives with Bulgarian partners are promising processes.

The public authorities are aware of the fact that the Danube River has an extraordinary tourist and economic potential, which, unfortunately is exploited in a very small extent in Romania. That is why they are planning to boost the tourism activity by creating new Danube ports some developing into tourism centres for whole regions and cities.

The Constanta County Council has made the first steps towards an increase of the quality of transport for tourism purposes on the Danube River, by drawing up some feasibility studies for these investments.

Planning and designing the tourist ports will encourage tourism in the Danube area and, implicitly, will create a higher interest for the investors in the area. More than that, the county authorities are also thinking to create some tourist assets, by means of some public - private partnerships which could serve the tourist ports.



In **Bulgaria** 15 tourist regions are identified. The national policy for the development of tourism sets aims for

- promoting regional partnerships;
- supporting the setting up and operation of regional tourism organizations for the management of tourism regions;
- creating regional tourist products;
- monitoring and analysis of tourism development in the area.

Cultural tourism complemented by cruise, river, ornithological, wine-tasting and adventure tourism are listed as potentials of the Bulgarian Danubian tourist region.

In the document entitled “Operational Programme Regional Development, Priority Axis 3 Sustainable development of tourism, operation 3.1. Development of tourist attractions and related infrastructure” several Danubian municipalities are highlighted as high and potential tourist destinations deserving concentrated development of infrastructure and services.

In summary, the policy statements of the four countries are in agreement in the recognition of the importance of tourist development and of the tourist potentials of the Danubian space. The national policies provide broad, indicative frameworks which are then further specified by the regions or other area units to fit the broad objectives to their local characteristics.

What will be further needed are the following:

- a transnational approach highlighting the added value and possibilities of cross-border and inter-regional cooperation, cooperative structures, and
- a strategic approach highlighting, besides the objectives, the proposed and planned and foreseen interrelated actions towards the attainment of the set aims.



## ***II.2. Vision, expectations from the DATOURWAY project***

The partners of the DATOURWAY project have expressed intentions to work together, because they intend to capitalize from the work process and make steps towards the fulfilment of the relevant national as well as transnational objectives.

In **Slovakia** what is expected from the DATOURWAY project is to promote the recognition appropriate exploitation of the tourist potentials of the Danube space.

For the time being tourism does not play great importance in the economic structure of the project area. At some locations and small regions it may be of significance (spa towns, thermal swimming pools) with economic benefits for the local residents. In sectors, for which there is an increased interest from the side of domestic and foreign clientele (rural and active tourism) in the last period there has been certain advancement, however offer is not yet sufficient neither in quantity nor quality.

Nevertheless, there is evidence for the development of tourism as an integrated part of strategic development plans from local all along with regional level. Moreover, development of tourism is one of the most common topics on cross-border economic cooperation in the project area with the Hungarian and Austrian regions. Within this cooperation the abolition of infrastructural obstacles is planned, development of common products and common marketing. The DATOURWAY project may promote these initiatives.

In **Hungary** there is increasing demand for MICE (Meetings, Incentives, Conventions and Exhibitions) tourism, requiring training programmes and product and service presentation, conference tourism, as well as other company events, exhibitions and fairs. The key venues of MICE tourism are county centres and bigger towns. Tourism of all kind need for its qualitative improvement human capacity development is targeted at improving language skills and service culture, as well as networking and international cooperation, which is a basic function and intention of the DATOURWAY project.

In **Croatia** there is a need to establish some balance of the coastal and land-locked areas in terms of tourism. The DATOURWAY project is expected to promote the areas along the Danube and obtain the recognition of their significant potentials.

In **Serbia** there are great expectations from the DATOURWAY project as from all tourist development projects along the Danube, with special regard to the fact that so far, with the exception of traditional tourist destinations such as Belgrade and Novi Sad, the Danubian areas of Serbia are not popular in the absence of an appropriate and attractive regional image. It is foreseen that with the development of tourism cooperation between Serbia and the other Danube countries would involve intensive traffic of boats and yachts, which in turn will raise the need to establish tourist and shipping routes adapted to the course of the river flow.



In the **Romanian** national analysis it is emphasized that the success of tourism development in the Danube area will depend on the support that it will get from the stakeholders involved and the cooperation between them.

The national government bodies like the Ministry of Regional Development and Tourism has the coordination and territorial planning, other ministries control their own sphere of action like environment, culture, education, agriculture etc. Their interaction and cooperation at the governmental level is indispensable. The regional and local authorities, tourist agencies and enterprises are essential stakeholders. Their joint action is needed to come up with specific activities to rise the tourism competitiveness. Each of them has to point out the main impediments that prevented them from developing their activity properly and has to take positive action to overcome them.

Particularly important are the cooperative actions of cross-border, neighbouring communities and spatial units, which may provide models for transnational activities promoting tourism to the benefit of all protagonists.

The cooperative mechanism proposed by the DATOURWAY project may be of help to enhance the process of inter-organisational collaboration.

In **Bulgaria** besides the overall importance of the development of tourism, the expectations from the DATOURWAY project tend to refer to the consolidation, broadening and intensification of the ongoing cooperative initiatives with the cross-border partner Romania (transport links: river crossing, environmental security of water quality, navigability as well as joint action in business, culture, education) and extension of cooperation with other Danubian regions and thus strengthening Bulgarian participation in the European cooperative network.

***The vision for the DATOURWAY project area*** is to become a tourist development corridor, where to tourist destinations are interlinked to comprise an integrated entity. Such a tourist development corridor would / should have to capacity

- to adapt to the changing markets,
- to increase and enrich the tourist potential,
- to strengthen the social base and human resources of tourism,
- to protect natural assets and rehabilitate the environment.

For the attainment of this vision it is necessary

- to improve accessibility and develop transport links
- to promote the development of tourism related businesses, especially SME's
- to enhance attractiveness by the appropriate presentation of built heritage, local and regional traditions, cultural activities
- to create and develop suitable infrastructure including accommodation and services
- to enhance cooperation and networking,
- to develop appropriate social capital by means of a variety a education and training programs,

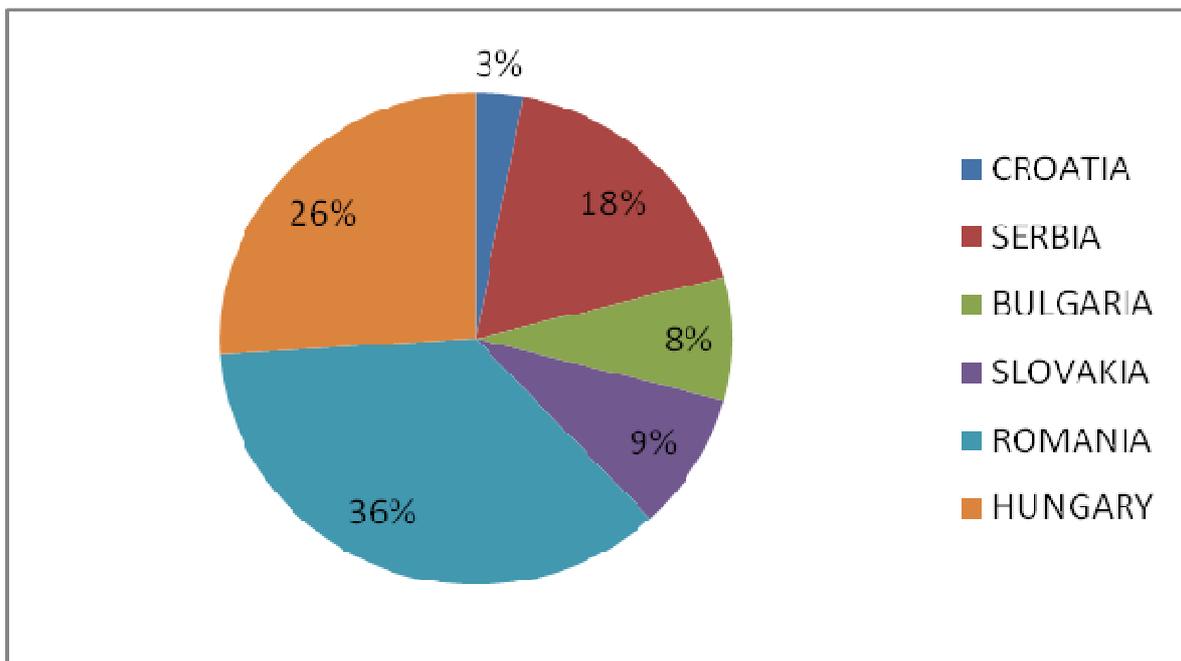


- to protect and wisely manage the landscape and ecological assets
- to improve the environmental quality
- and to mitigate environmental hazards.

The DATOURWAY project should contribute to the attainment of these ambitious purposes.

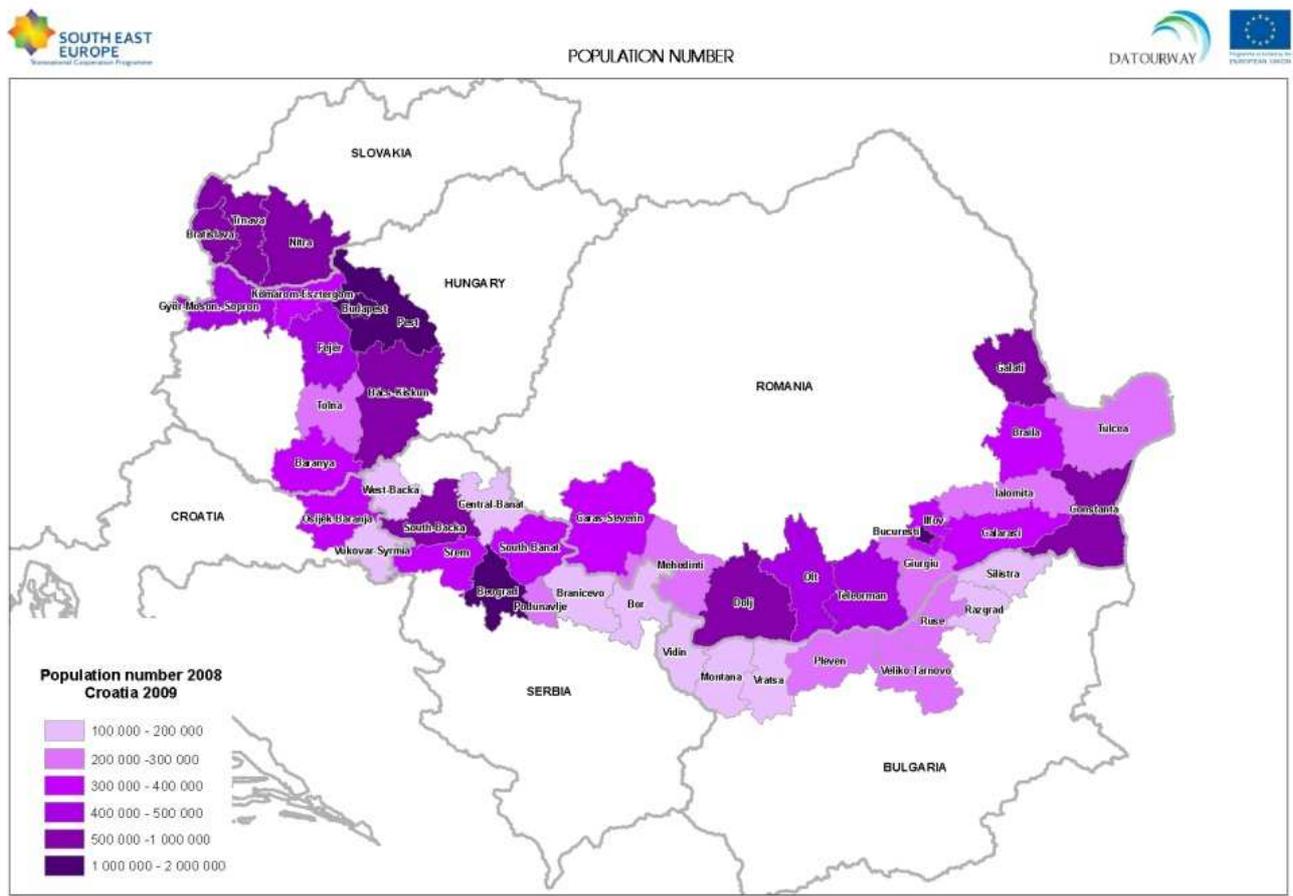
**II.3. Social resources**

The DATOURWAY project area covers altogether 182.265 km<sup>2</sup> (of six countries) the number of inhabitants is 20,409,444, one third of which is the share of Romania and a quarter is of Hungary.

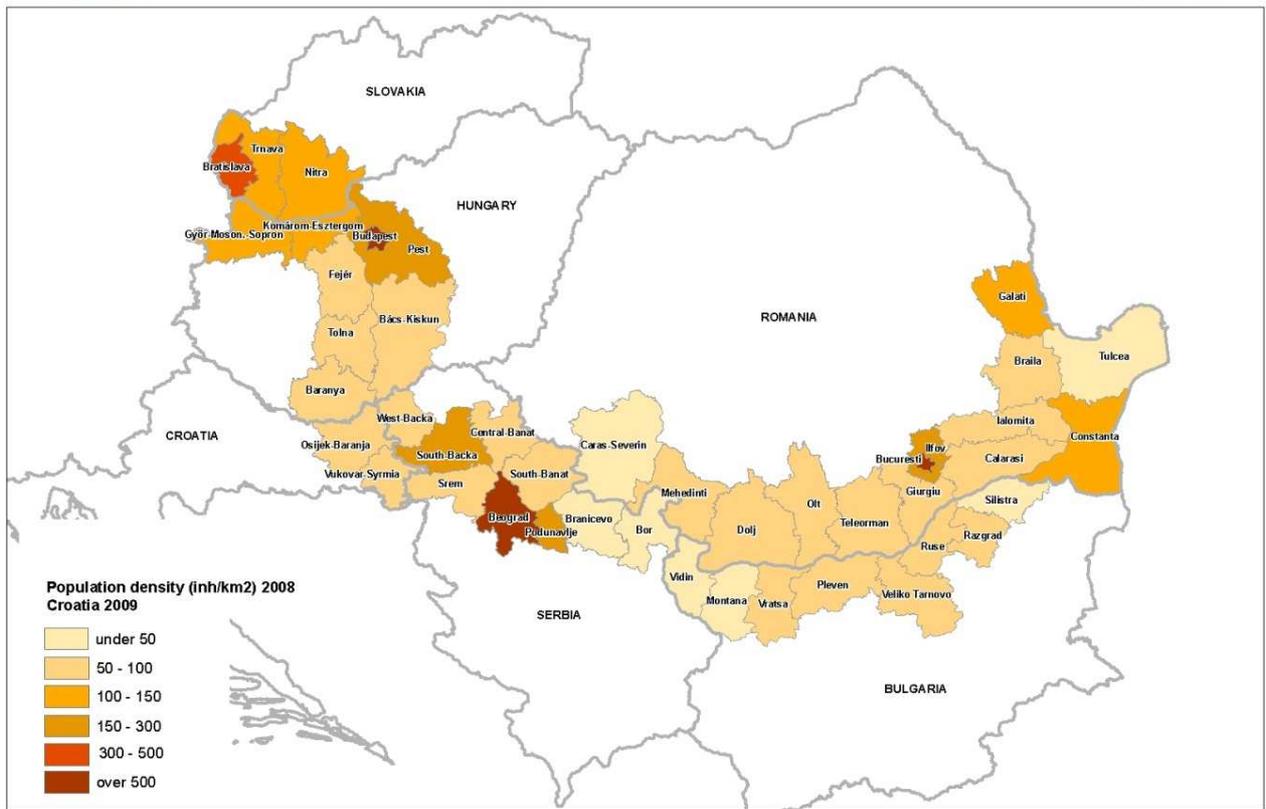


**Share of population between the DATOURWAY countries**

The other four countries share the remaining 5/12. Average density is thus 112 people/ km<sup>2</sup>. The area comprises four national capitals, three of which are right on the riverside. The capital cities (Bratislava, Budapest, Beograd, and Bucharest) and the port cities in Romania (Constanta, Galati) are the largest urban concentrations, where the densities are the highest. The rural districts on the other hand are rather sparsely populated. These include several Danubian districts in Bulgaria (Montana, Razgrad, Silistra, Veliko Tarnovo, Vidin, Vratsa), Romania (Calarasi, Caras Severin, Ialomita, Mehedinti, Tulcea) and Serbia (Bor, Branicevo, Central Banat) and two counties in Hungary (Bács-Kiskun and Tolna) The counties of Croatia (Osijek-Baranya and Vukovar- Srijem) are also predominantly rural.



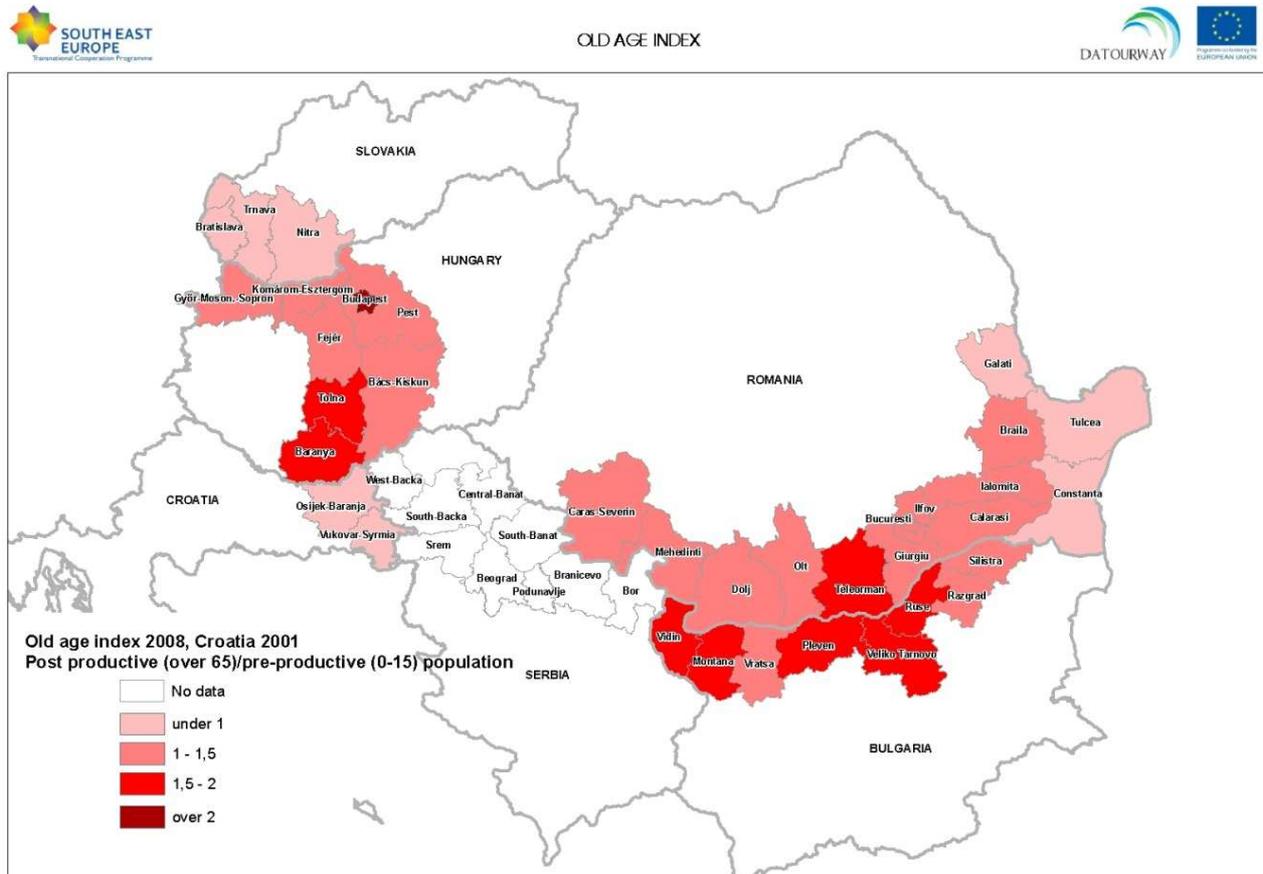
The figures on density also highlight the urbanized areas of Slovakia, north-western and central Hungary, South Bačka, Beograd and Podunavlje in Serbia, Bucharest-Ilfov, Constanţa and Galati in Romania.



Decline of the number of population is a general trend in the project territory. It is a marked tendency in the Bulgarian, Romanian, Hungarian sections and the eastern parts of the Slovakian section of the project territory. The same applies to the Danubian districts of Croatia. In the Serbian districts the temporary and permanent migration flows caused by the political controversies affect the change of the number of inhabitants.

As for the demographic structure there is a tendency of aging. Old age structure is characteristic for the rural peripheries and the core areas of large cities. It is interesting to note that low aging index (that is, somewhat higher ratio of the young than of the old age group) is characteristic for the beginning and the ending sections of the DATOURWAY area. All the Slovakian districts demonstrate relatively high ratio of young age groups. The city of Bratislava has an aging demographic structure, but the regional indices offset this feature. At the other end of the area, in the Romanian districts of Constanta, Galati, Tulcea the younger age groups are also predominate, and there are other districts (Ilfov, Caras-Severin) where this ratio is near equal. Ilfov, with a high migration gain, is actually the district surrounding the city of Bucharest and is thus affected by the suburbanisation processes of the capital region. The County of Pest around the city of Budapest is of rather similar position, it also benefits from the suburbanisation trends, but the age structure is also affected by the rural parts the county in its south-east edge. In the counties of Croatia the age structure of the

population is better than national average. The situation is generally more favourable in economically less developed Vukovar-Srijem County and is significantly caused by more favourable age structure of immigrants from Bosnia and Herzegovina. In Serbia five out of nine counties has the higher aging index than the national average. Extremely high aging index is recorded in Branicevo county and Bor county. The best age structure is in Južna Bačka and Srem counties.



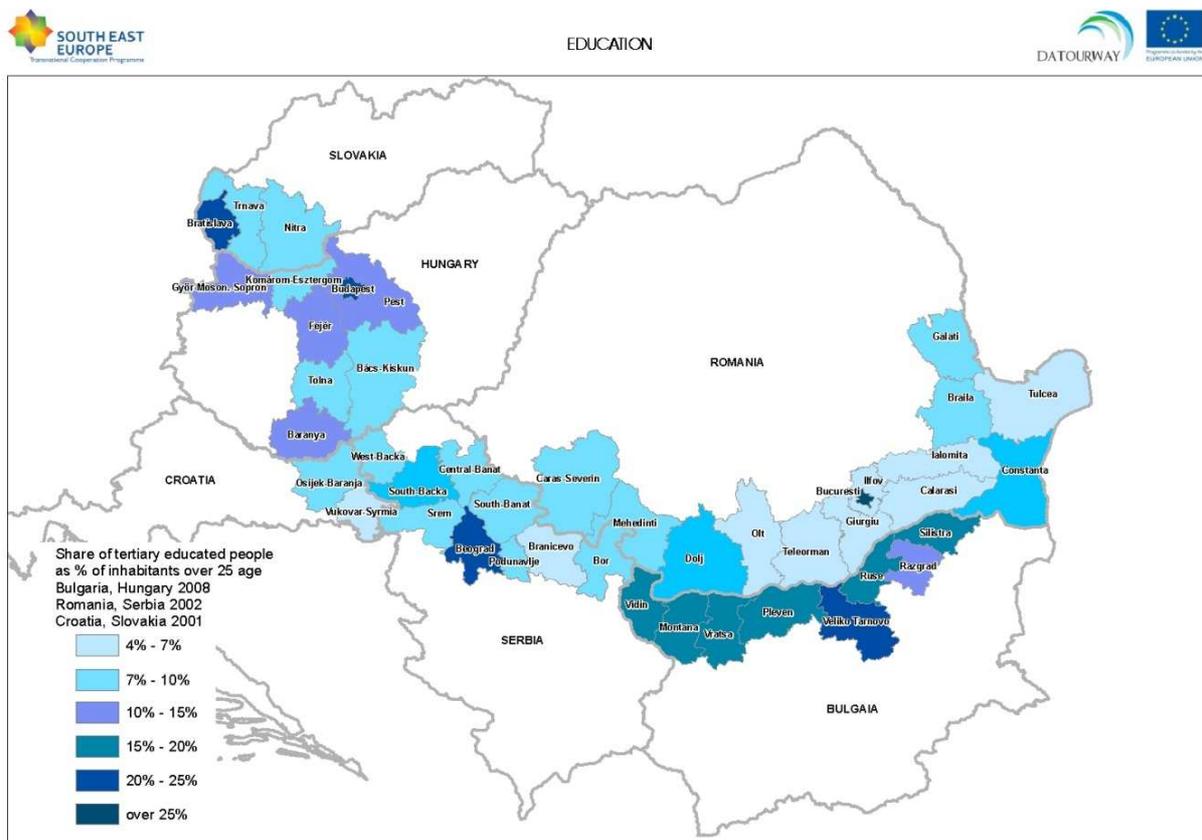
In all the other districts or counties of the area the older age groups are larger than the younger ones. Apart from the city of Budapest (with a particularly high aging index) the highest aging indices are in the south-western counties of Hungary, in county Teleorman of Romania and five Bulgarian districts (Vidin, Montana, Pleven, Veliko Tarnovo, and Ruse).

The cities, both the large and the medium size urban concentrations maintain their significance and determine the spatial pattern of population. There is two-way flow of population: one from the rural peripheries towards the urban zones, and another from the urban cores to the suburban belts of urbanized areas. The economic changes and the recent crisis have had a rather devastating impact on the urban industrial centres, especially on those depending on a few industries or even only a single manufacturing production. Shrinking towns and cities have become a phenomenon in the DATOURWAY territory too.

The urban – rural dichotomy is characteristic for the area especially as one moves from west to east (as visible in the Slovakian section for instance) and from north to south (e.g. in Hungary). The urban – rural difference continues in the counties of Croatia and in an even more marked way in Serbia. Here around the large cities (Belgrade and Novi Sad the agglomeration – conurbation trends are evolving though the population of the core cities continues to grow fed by migration. At the lower section of the area, as in Romania and Bulgaria the vicinity of the ports and great cities are the centres of growth. The urban – rural dichotomy, however, is expressed in terms of employment structure (higher rate of agricultural workforce in rural areas, whereas greater share of services and industries in the urban concentrations (cities and their urbanized belts) as well as in the educational standards.

The educational structure is interconnected with urbanisation rates and the presence of centres of higher education. This characteristic feature is an important component of tourism development, as a certain rate of skill and cultural quality is indispensable for the sound development of related services.

The districts or counties with major cities and universities have of course higher educational levels (like the districts of all capital cities, as well as Trnava, Nitra in Slovakia, Győr-Moson-Sopron, Fejér and Baranya in Hungary, Belgrade in Serbia, Bucharest, Constanța, Dolj in Romania, Ruse, Pleven, Svishtov in Bulgaria. The low level of education may be a constraint on the development of tourism in the peripheral areas.

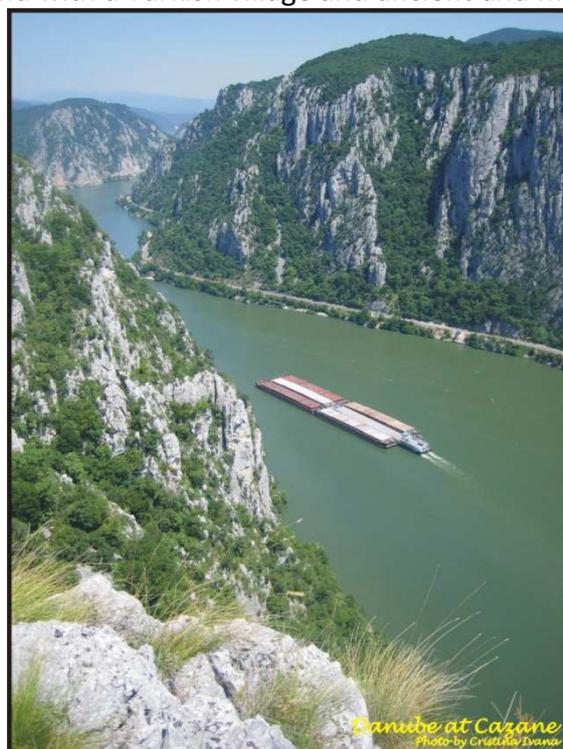


**II.4. Natural endowments, state of the environment**

The greatest under-used asset of the DATOURWAY territory is made up by the diverse, hidden treasures of the cultural and natural landscape. This outstanding resource is, however, highly vulnerable and already endangered by irresponsible processes.

The outstanding resource of the area is the river itself. The Danube River is the second longest river in Europe. It stretches over 2,800 km across Europe and flows into the Black Sea, after crossing 10 countries and settling into a vast delta which constitutes the richest biodiversity area in Europe.

The use of the river as water resource and as a transport route has and had been a historic concern of people living by the Danube. Navigation and the transfer of freight on the Danube were high among the priorities in the 19<sup>th</sup> century. The result of the Iron Gate project of the period was that by the end of the century the steam ships could cross and thus the river was navigable from the Black Sea to Passau. Furthermore, a supplementary road transport route was completed to carry out a modal split of freight transport appropriate for the technological capacities of 1800's. It was hundred years later, in 1964 - 1972 that for the improvement of navigation and for power generation the huge modern barrage system was completed involving substantial transformation of the landscape (including for instance the disappearance of an island with a Turkish village and ancient and medieval monuments).



The Danube still is a fundamental landscape feature, a treasure of ecosystems and cultural heritage. At the same time, the Danube appears on the list of 10 most endangered rivers in the world, as compiled by the WWF International in 2007. The main threat identified is connected to physical alterations to the river. Pollution and the development of invasive

species are also concerns. Of particular importance for the region is the quality of the water which is discharged into the Black Sea.



***Nature Park Kopački rit***

Hydro-morphological alterations to rivers and lakes, like the interruption of river and habitat continuity, the disconnection of adjacent wetlands/floodplains and hydrological alterations have a significant impact on water quality. Impact on the ecological status of the water and its sediment balance for instance must be considered.

The natural heritage of the Danube region as a whole and of the DATOURWAY area particularly is of European importance. The region contains a large share of Europe's remaining great wilderness areas, as well as rich cultural landscapes.

The Danube and its tributaries are vital to the wildlife ecosystems and indeed provide ecological connections that are essential for overall European environmental health.

This unique natural asset is under growing pressure. The biodiversity and variety of ecosystems of the region are being gradually reduced. This is mainly due to the rapid industry, urban, transport and agriculture development and sprawl during the recent years, compensating for the relative stagnation of a significant part of the region in the past. There is a need to increase public awareness about the ecological needs especially in the South-Eastern part of the region, as well as the use of best available practices.



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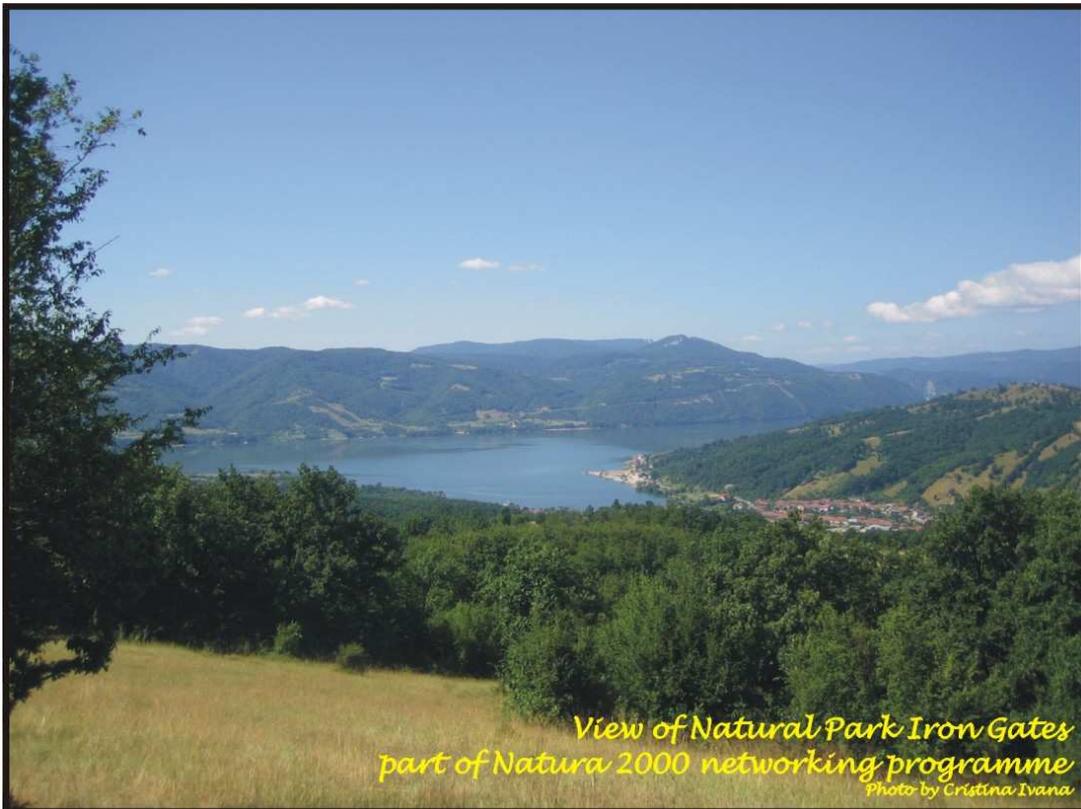
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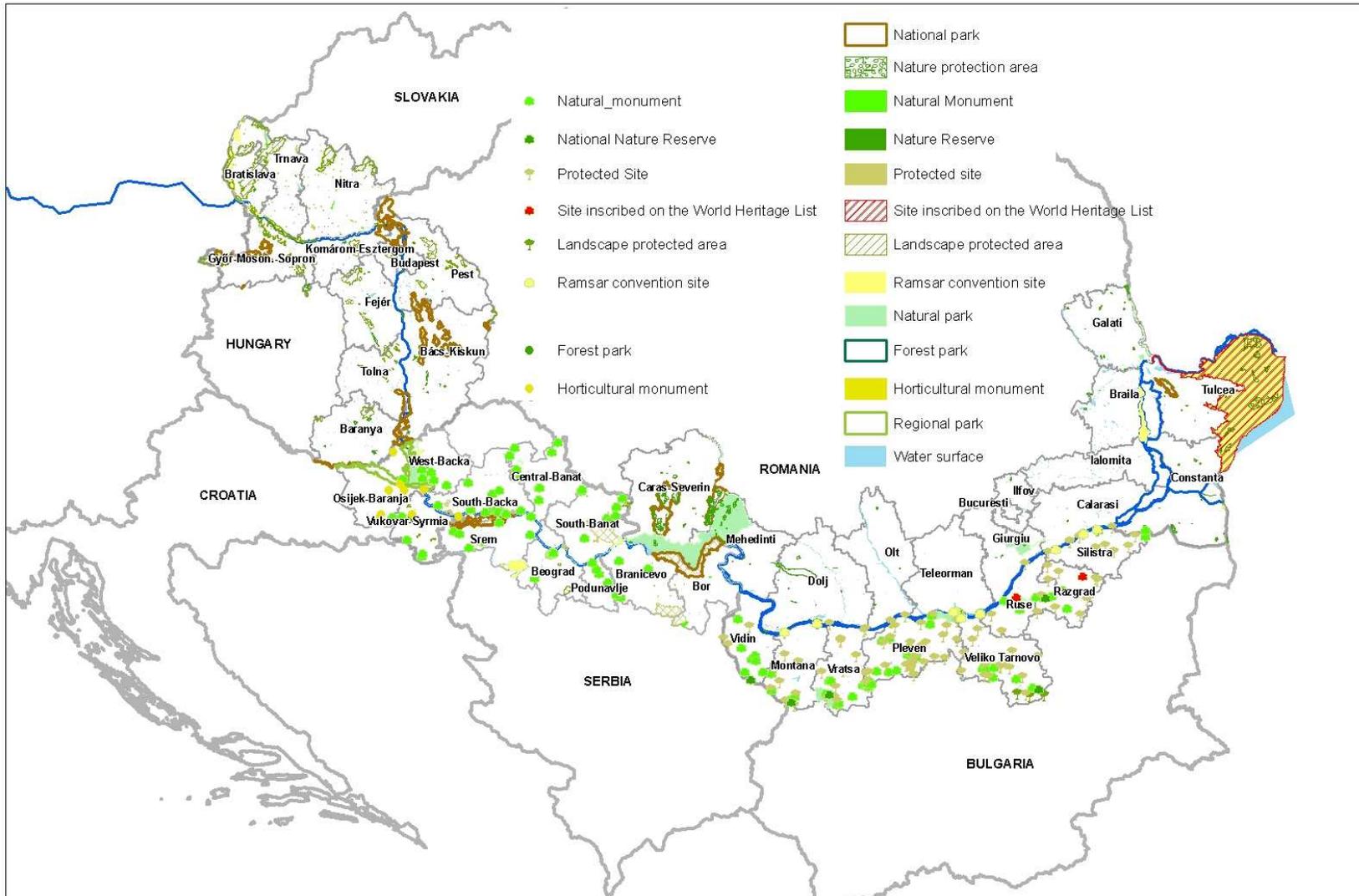


*Danube Delta - egretta*  
Photo by Ancuta Gheoldea

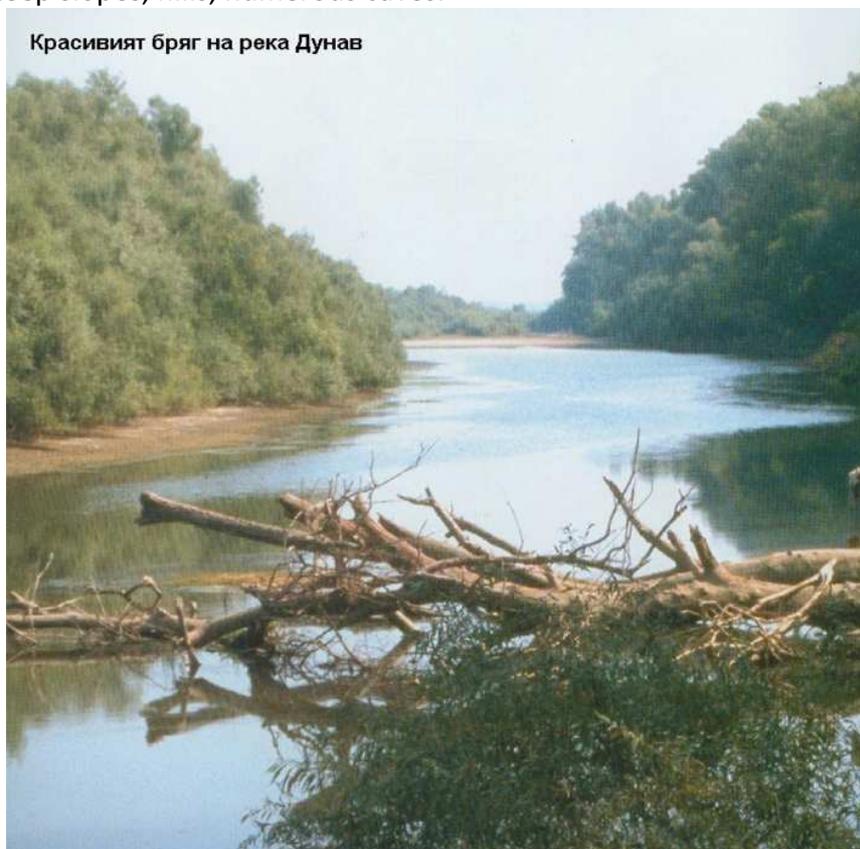


*View of Natural Park Iron Gates  
part of Natura 2000 networking programme*  
Photo by Cristina Ivana

**PROTECTED AREAS**



The landscape of the DATOURWAY area is marked by rich diversity. There are dramatic landscapes, where the river cuts through mountains and flows in deep lying valley skirted by steep slopes of rocks and woodland, primeval forests. An example of this landscape is the Danube bend shared by Slovakia and Hungary. The other, more magnificent example of dramatic landscapes is the 144 km long spectacular and impressive gorge (Iron Gates), which crosses through the south west part of the Southern Carpathians, with steep and calcareous slopes. The Danube Gorge at Iron Gates is one of the longest and most spectacular cross-valleys in Europe and the biggest of the Carpathians. The unique limestone landscape; areas of bottlenecks, gorges are major tourism assets. The limestone has created various karst landforms: steep slopes, hills, numerous caves.



There are several other, though less dramatic, but similarly significant and spectacular areas of outstanding natural beauty in the DATOURWAY region, stretching along the river (like Žitny ostrov (Podunajska Rovnina) and Szigetköz in Slovakia and Hungary, further to the south the multiform heath of Kiskunság, the joint, cross-border wetlands and forests along the rivers Danube and Drava (Hungary and Croatia), the riparian complex of Gornje Podunavlje and the watershed between rivers Danube and Morava Dolnje Podunavlje in Serbia, the “Trajan’s road” running from the Serbian to the Romanian sections of the valley, the fields and slopes with rich and diverse vegetation in the Bulgarian parts. All over there are ancient monuments, ruins of castles, medieval town and village centres demonstrating the harmonious coexistence of natural and cultural heritage.



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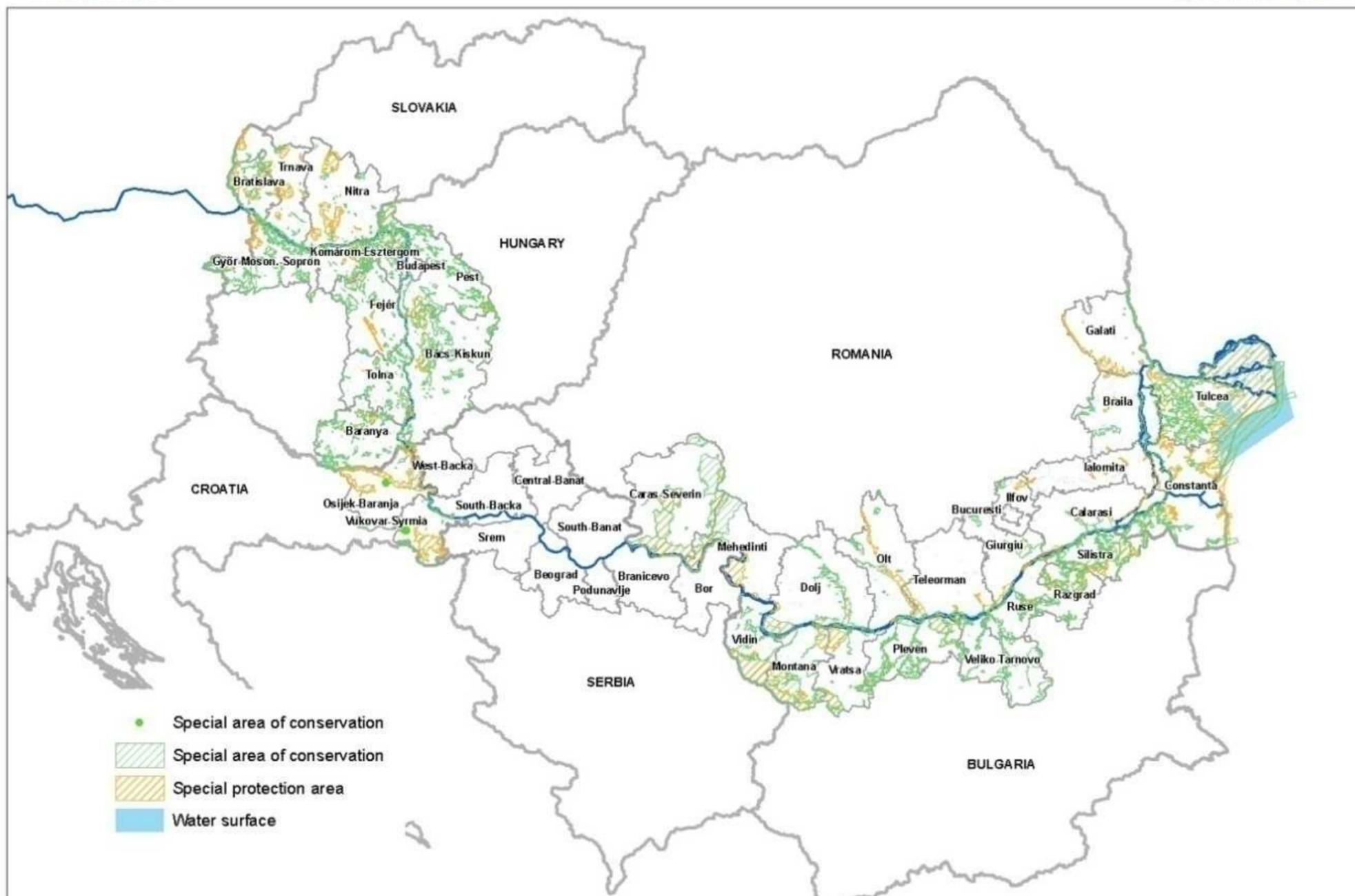
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NATURA 2000





Throughout the DATOURWAY area, in all countries there are efforts to protect and preserve the natural assets and the cultural monuments. National Parks, nature conservation areas, Natura 2000 sites have been designated and efforts are taken by legal instruments and other though less available means to take care of what has remained to the present and future generations from the past.

In the **Slovakian** part of the DATOURWAY area there are 6 large landscape protected areas (Dunajské luhy, Malé Karpaty, Záhorie, Ponitrie, Štiavnica Mountains and Biele Karpaty), 18 NATURA 2000 bird protection areas and also 41 areas of European significance (6 Ramsar wetlands).

In the Hungarian section of Danube riverside there are six National Parks (Fertő-Hanság, Kiskunság, Hortobágy, Balaton-hills, Duna-Ipoly, Duna-Dráva), 16 landscape protection areas and 61 nature conservation sites. There are also 27 forest reserves designated for scientific research. The NATURA 2000 areas identified for protection according to EU legislation, 173 in total, form a continuous belt broken by the built-up area of the city of Budapest only. 146 of them are for Special Protection of Nature and 27 for Special Protection of Birds. There are protection areas under the Ramsari Agreement on the territory of six from the total of seven counties, and there are three UNESCO Biosphere Reserves too in the DATOURWAY region.

According the Law, on the territory of **Serbia** there are large protected areas include 2 national parks (Fruska Gora, Đerdap), 7 special natural reserves (Delibatska Peščara, Gornje Podunavlje, Karadjordjevo, Kovlijsko-Petrovaradinski rit, Obedska Bara, Zasavica, Stari Begej-Carska Bara), 1 natural monument and 1 landscape of extraordinary importance (Kosmaj). The identification of NATURA 2000 elements have started. In the Serbian part of the DATOURWAY territory, 22 areas are within the EMERALD network (according to the Bern Convention), which will be the basis for establishment of a national ecological network and NATURA 2000. In the target area there are 6 areas protected according to the Ramsar Convention.



***Spatial Nature Reserve “Deliblatska Pescara”***

In the **Croatian** territory there are 12 large natural protected areas (Kopački rit, Erdut, Spačva river area, Vuka river area, Virovi, Podpanj, Lože, Radiševo, Vukovarska ada, Kunjevci, Zvirinac, Kanovci), and also smaller one, known as natural monuments, covering relatively small area. In Croatian Danube area they include one natural monument protecting meadows (Bilje cemetery), three natural monuments protecting groups of trees, and two natural monuments protecting individual trees. Under special protection as monuments of park architecture there are twelve parks in Osijek-Baranya and four in Vukovar-Srijem County. The majority of the protected areas are also included in the NATURA 2000 areas. In Osijek-Baranya County there are 8 areas and 10 points important for various kinds of species except birds, and in Vukovar-Srijem County 17 areas and 2 points.

In counties bordering the **Romanian** section of the Danube river are recorded 11 major national protected areas, National Parks, Natural Parks and Biosphere Reservations, 68 Sites of Community Importance (SCI) established at national level, 60 Special Protection Areas for Bird (SPAs) and 162 scientific reserves, natural monuments and nature reserves.



In the **Bulgarian** Danube section the natural landmarks with the respective of landmarks can be divided into several groups: there are 3 National Parks (Vratsa Balkan, Rusenski Lom, Persina), 3 nature reserves (Tsiber, Srebarna, Vratsa Karst), 1 Biosphere Reserve (Chuprene), 4 rock formation phenomena (Belogradchik Rocka, Vratsata, Ritlite, God's Bridges), 4 caves (Magura, Venetsa, Ledenika, Ponora) and 3 wetlands (Srebarna Lake, Belene Islands and Ibisha Island). There are many protected areas located in the project area which are included in the European environmental network NATURA 2000. Protected areas for birds including migratory birds are located in the northern part of the project area. The protected areas for birds in the southern part are located in the plains and hills of the project area, the Prebalkan Mountain and some parts of Stara Planina Mountain. The second type of protected areas aims at protecting habitats of valuable grass and other plant species, wildlife, etc. in 11 territories.

8% of the total area of the DATOURWAY region is under nature protection. The largest extension of nature protection is in Romania and Slovakia. In both countries 9-10 % of the total area of the riverside counties is under nature protection.

The map of land use pattern (Corine Landcover) highlights the significance of the forest areas by the Danube bend in the north and by the Iron Gate as well as the mountain slopes. The beautiful coastal wetlands at the Danube delta, the meadows of Kiskunság and Sarmia and at the influx of Danube and Drava are also highlighted. The predominance of the artificial surfaces is also visible. Arable land is the main use of land in this area, and large proportion is comprised by built up area: both by the urbanized spaces and by those of the scattered villages.

The summary of the approximate assessment of Corine Landcover polygons indicates that built up areas comprise 4-4.5 % of the total planning area, 50-60 % is arable land, forests cover 18-20 % of the area. The comparison of the relevant values of the three land cover classes in the counties of the 6 DATOURWAY countries has highlighted the greatest impact of human interventions (shown by the highest ratio of arable land and the urban fabric) in Slovakia. In contrast, the dominance of natural and semi-natural areas is in the riverside area of Croatia, where the ratio of arable land and urban fabric is the lowest and that of woodland is the highest.

The ratio of woodland is the lowest in Romanian part of the DATOURWAY region, whereas the ratio of arable land is the lowest in Serbia.

The approximate ratios of the six countries are shown in the table below.



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COUNTRY	CATEGORY	CATEGORY/TOTAL TERRITORY (%)
<b>Slovakia</b>	<i>urban fabric</i>	4,6
	<i>arable land</i>	68
	<i>forest</i>	18
<b>Hungary</b>	<i>urban fabric</i>	3,5
	<i>arable land</i>	66
	<i>forest</i>	20,5
<b>Croatia</b>	<i>urban fabric</i>	2-3
	<i>arable land</i>	54
	<i>forest</i>	24
<b>Serbia</b>	<i>urban fabric</i>	3,2-4
	<i>arable land</i>	52
	<i>forest</i>	18
<b>Romania</b>	<i>urban fabric</i>	3,5-4,4
	<i>arable land</i>	61
	<i>forest</i>	15
<b>Bulgaria</b>	<i>urban fabric</i>	3,3-4
	<i>arable land</i>	55
	<i>forest</i>	21



**National Park Fruška gora**



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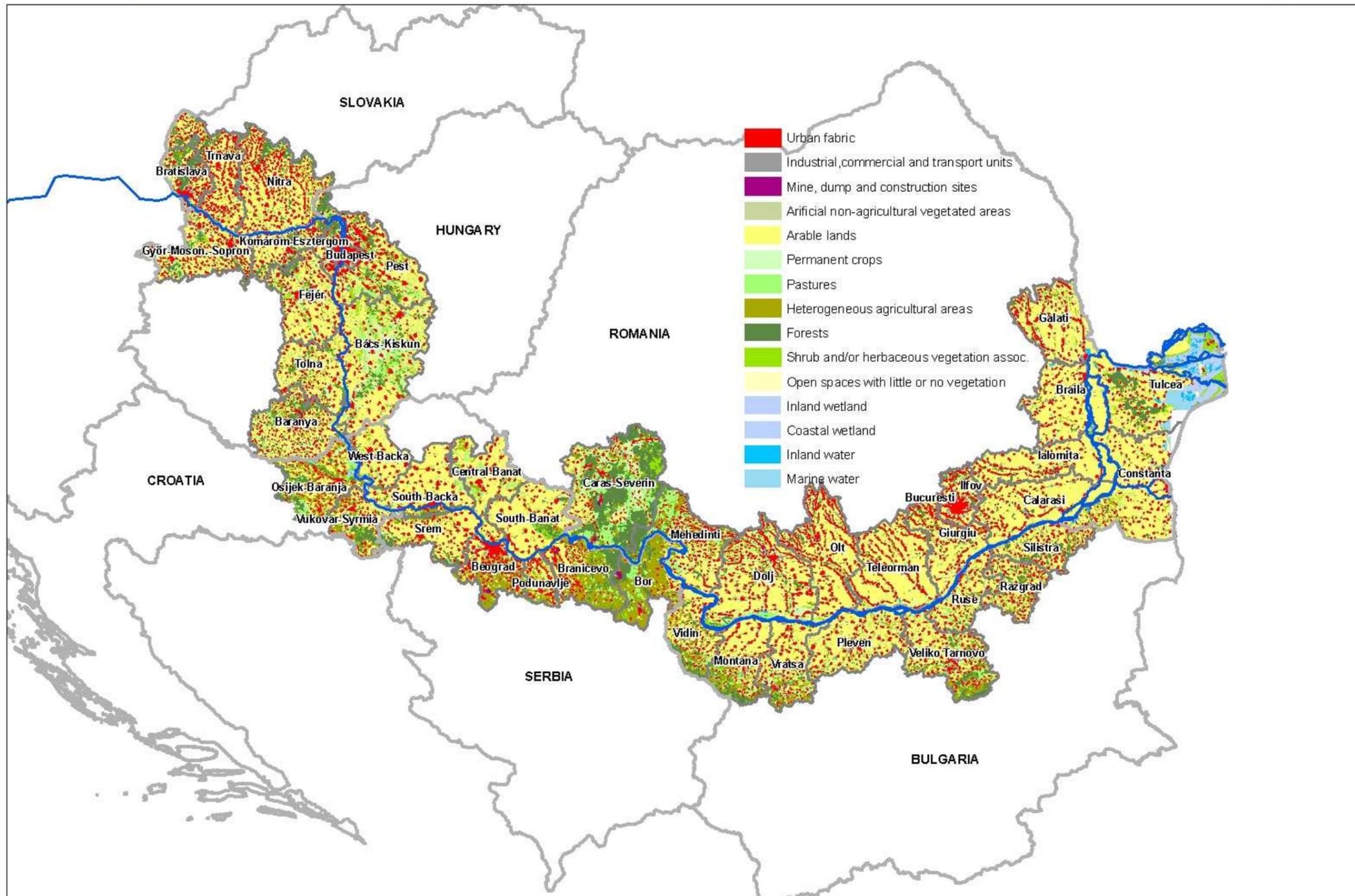
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**LAND USE (CLC2000)**



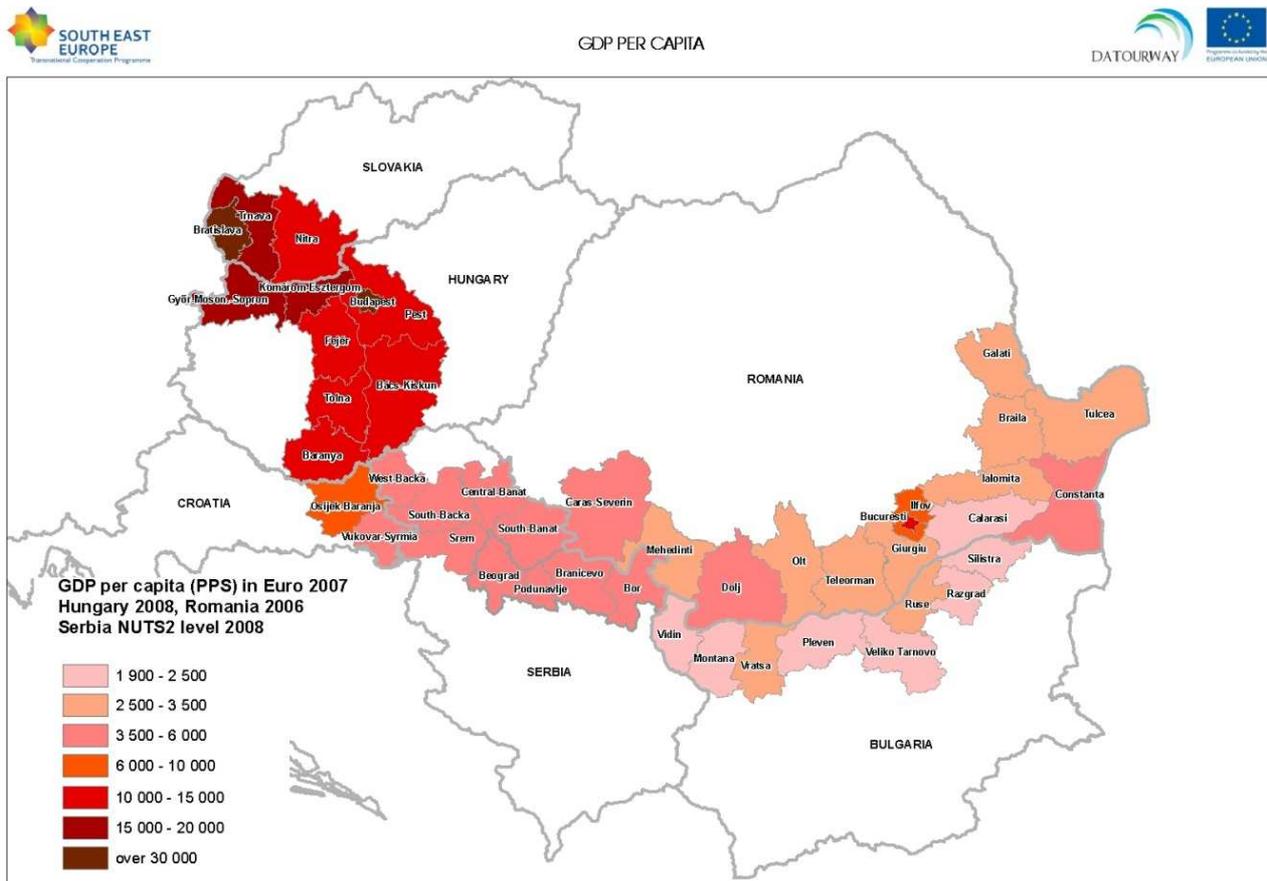
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## II.5. Economic characteristics, with special regard to tourism

The economic features of the DATOURWAY area vary just as other features do.



The section of **Slovakia** is advanced in economic terms, especially of course the district of Bratislava, both the capital city and the smaller centres around it and the urbanized zones in the other districts Trnava and Nitra (the central cities and the smaller centres like Dunajská Streda, Nové Zámky, Komárno, etc.). Here the level of economic development is highlighted by the fact that this is the only part of the DATOURWAY area within the Euro zone. From the aspect of GDP there are striking differences towards east. The entrepreneurial activity of the population (number of businesses per 1000 inhabitants) is the highest in the capital and surroundings and is gradually declining towards the eastern parts. In terms of employment there is great difference between Bratislava region and all the other parts of project area.

In **Hungary** the attained level and further growth potentials of the north-western and central administrative units are in contrast with the south eastern and south western counties, though all over the disparities between the rural peripheries and urbanized zones are even sharper. In Budapest GDP/inhabitant is twice higher than this value even in the most



advance counties. It is only in Budapest and its surroundings; the Central Hungary Region that GDP/capita is higher than 75 % of the EU average. In 2008 the ratio of registered job-seekers (unemployed) was lower (8.6%) in the riverside counties than the national average (12.4%). Unemployment rate is the lowest in Budapest, Rest County, Gőr-Moson-Sopron County and Komárom-Esztergom County, whereas the counties along the south section have higher rates than the national average.

Although there has been some economic growth in the Danubian counties in **Croatia**, they both are well below the national average. Vukovar-Srijem County is second least developed and Osijek-Baranya is on the 14<sup>th</sup> position among 21 counties measured by the index of development. For the period of 2002-2007, there has been growth in the both counties in absolute figures, but the GDP/capita level in Osijek-Baranya County was at level of 75-82% and in Vukovar-Srijem County between 57-60% related to the national average. In 2009 the rate of officially unemployed people was 23.3% in Osijek-Baranya and 27.5% in Vukovar-Srijem County. This situation corresponds to the general economic situation or even worse – Vukovar-Srijem County is second regarding the share of unemployed people in Croatia, and Osijek-Baranya is on 15<sup>th</sup> position among 21 counties. As for the number of enterprises per 1000 inhabitants, in the Danube area there is 8.5, while at the national level figure goes to more than double.

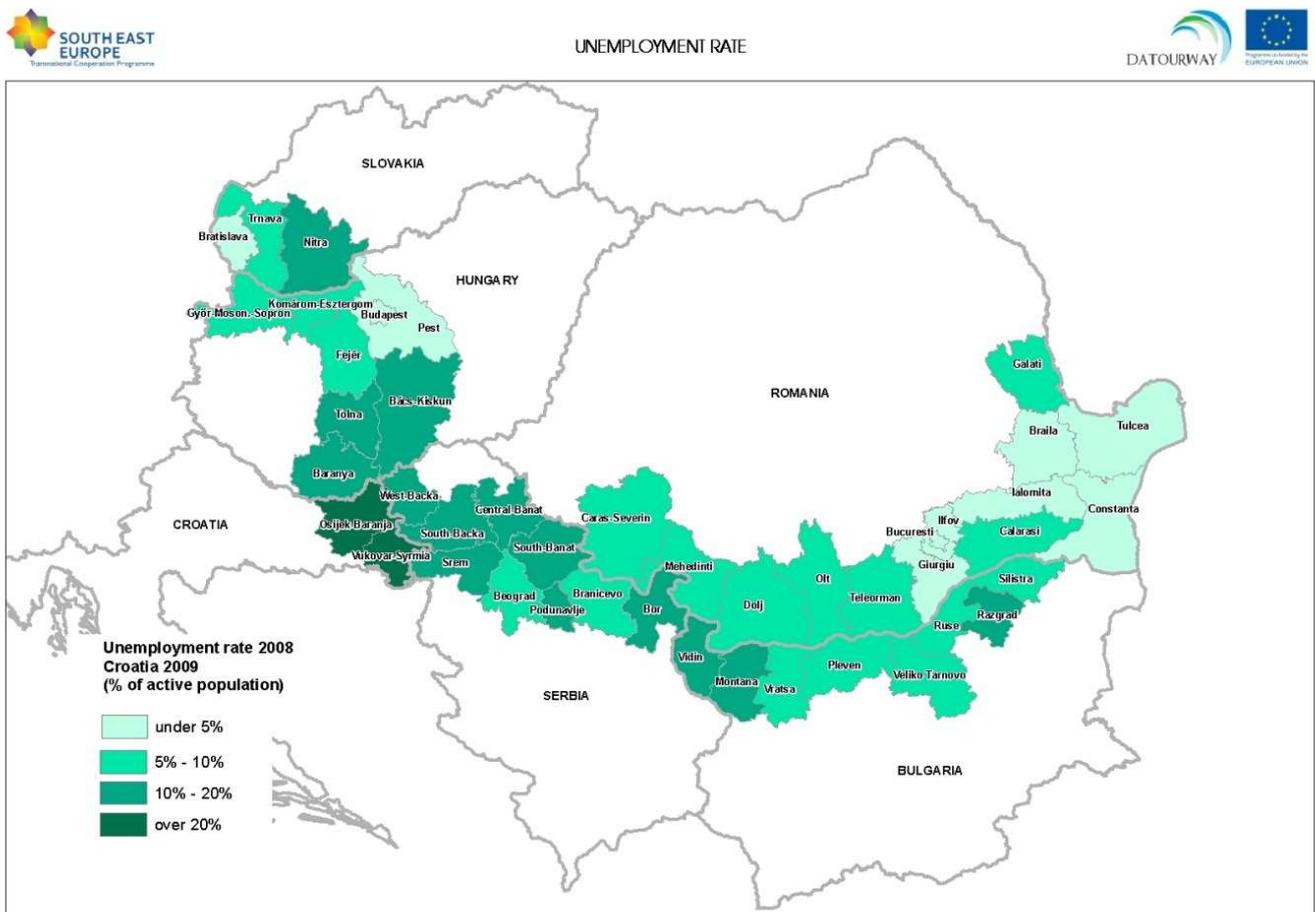
In **Serbia** the levels of GDP in Euro per capita were extremely low compared to the EU-27 level average. In 2008, it was only about 18.1% of the European average. It was slightly higher in Vojvodina (20.8%) than in Central Serbia (17.1%).<sup>1</sup> Counties with the highest values were the City of Belgrade, Zapadnobački and Juznobañanski County, while the lowest values can be observed in Podunavski and Borski County. In consequence of armed conflicts, international isolation and deep inner economic and social crisis during the 1990's, Serbian economy is currently weaker than in the late 80's. Economic transition started only in 2001/2002 and is still facing many obstacles (frequent election, insufficient coordination of governmental policies, lockouts, etc.). However, there are signs of consolidation and recovery, especially in regions that are traditionally more developed than others (City of Belgrade and Južnobački County, for instance).

In the **Romanian** section of the area GDP/capita is the highest in Bucharest + Ilfov county, whereas in all the other counties this figure is much lower, and also lower than the national average. The unemployment rates are the worst (over 8 % in 2008) in counties Dolj, Mehedinti, Teleorman. Long-term unemployment is also the highest here. The number of enterprises/1000 inhabitants is the lowest in the southern counties Teleorman, Olt, Mehedinti, and it's the highest for Ilfov and Constanța.

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<sup>1</sup> At this moment there are just national GDP data available, while the data for counties and municipalities are expected in 2011. In order to meet project requirements, GDP data at the level NUTS 2 and NUTS 3 were calculated by the Republic Agency for Spatial Planning.

The **Bulgarian** regions within the scope of the project area, especially in the western part, are lagging in their social and economic development behind the average indicators and they are known as being some of the most economically underdeveloped in the EU. The realised growth rates over the period 1998-2007 were below the national average. After 2005 a strong economic recovery was noted in Veliko Tarnovo, Pleven and Ruse. The number of companies per 1000 people shows lower values for the project area compared to the average ones in Bulgaria. The project area is one of the hardest hit by unemployment than other regions of the country. The unemployment rate compared to 2008 increased one and half times and in 2010 reached 12.95%, with an average 10.14% for the country. It is the result of persistent problems with employment in most small communities – mainly in western and eastern parts of the region.



In terms of the physical environment for development of tourism the most important condition is unspoiled or restored natural environment, natural and cultural heritage as well as the availability of appropriate infrastructure networks and services. The heavily transformed, artificial production zones, especially the derelict ones, have hardly any opportunity to attract meaningful tourism. The only large-scale exception is Emscher Park in Ruhr Region of Germany, though its lasting existence is also at stake. The criteria related to



the environment and natural and cultural heritage are certainly missing in the former and actual, derelict or operating industrial zones.

The present day economic crisis, which from time to time appears to release, then returns again and making a wavy shape sequence of change is actually one of restructuring again. The manufacturing industries which seemed to survive recently are declining and closing down, technologically advanced agriculture is confronted again and again with the dangers of natural disasters and strange epidemics, and even countries and economies which recently appeared to successfully harness the world of finance are facing serious difficulties. Although most parts of the DATOURWAY area, except the capital regions, have not been in the leading zones of economic competition, the trends and threats of instability have reached the whole area directly or indirectly. The best and safest way forward is therefore to promote local regeneration and return to, rediscover the local potentials which can be shared by others who seek recreation.

Therefore most of the activities earlier – and sometimes, somewhere still – regarded as beneficial and necessary for the survival and development of communities are obstacles rather than fostering factors of sustainable business and thus of thriving tourism. Tourism is excluded from the zones heavy manufacturing (unless it is short-term, restricted business tourism), especially in derelict industrial zones. The same applies to large-scale agriculture using heavy machinery and chemicals and spoiling the soil and the landscape in the long run. The “economic conditions with special regard to tourism” thus mean a different choice of economic development trend, in which appropriate qualities, cultural and environmental, as well as technologically advanced, play leading role.



## ***II.6. Infrastructure***

Accessibility, suitable transport conditions are indeed important issues in the DATOURWAY area in general, though there are a few exceptions.

Both the road and the rail networks are extended and seem to cover the whole area. Nevertheless, there are important missing elements especially in the high speed elements of transport. Bratislava is already linked to the European high speed railway network, but the connection is limited of the Vienna-Bratislava link. Important European corridors run through or hit parts of the DATOURWAY area.

These corridors have been identified with the purpose to integrate the European space by connecting distant areas for instance South East with North West (e.g. Greece and France). The practical objective is to promote the accessibility of popular European tourist destinations. This priority is of benefit for the DATOURWAY areas, though implementation is clearly a gradual process.

In Slovakia, apart from the western districts the motorways are still at the design stage. In Hungary the existing M1, M3, M5 motorways and the new-built M6 are essential road connections. Further down to the South-East the motorways are not available with the exception of the link between Bucharest and Constanta. The motorway connecting Belgrade – Zagreb – Ljubljana is significant in east – west links. The motorway (high-speed highway) will be finalised in 2011.

The network of secondary, tertiary and access roads suffer from low capacity, poor quality and repair. It is an opportunity that in the new EU transport policy the priority areas include the improvement of the secondary transport networks too. This class of the road network is essential for tourism, as it makes the small towns and rural areas accessible.

The rail network though extensive, but of inferior quality both in terms of technological and comfort standards. Therefore transport infrastructure hardly contributes to promoting attractiveness by accessibility.



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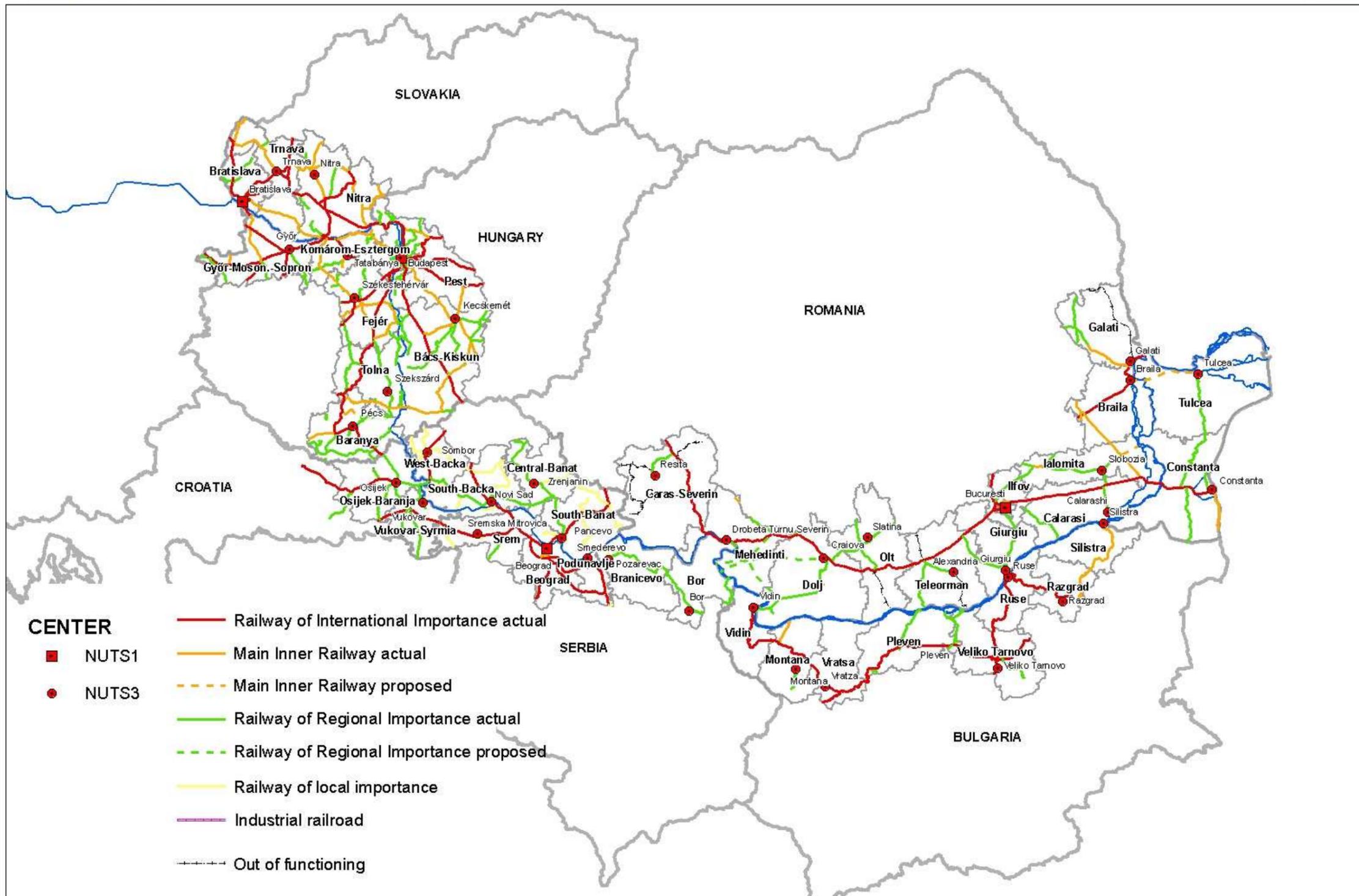
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### RAILWAY NETWORK



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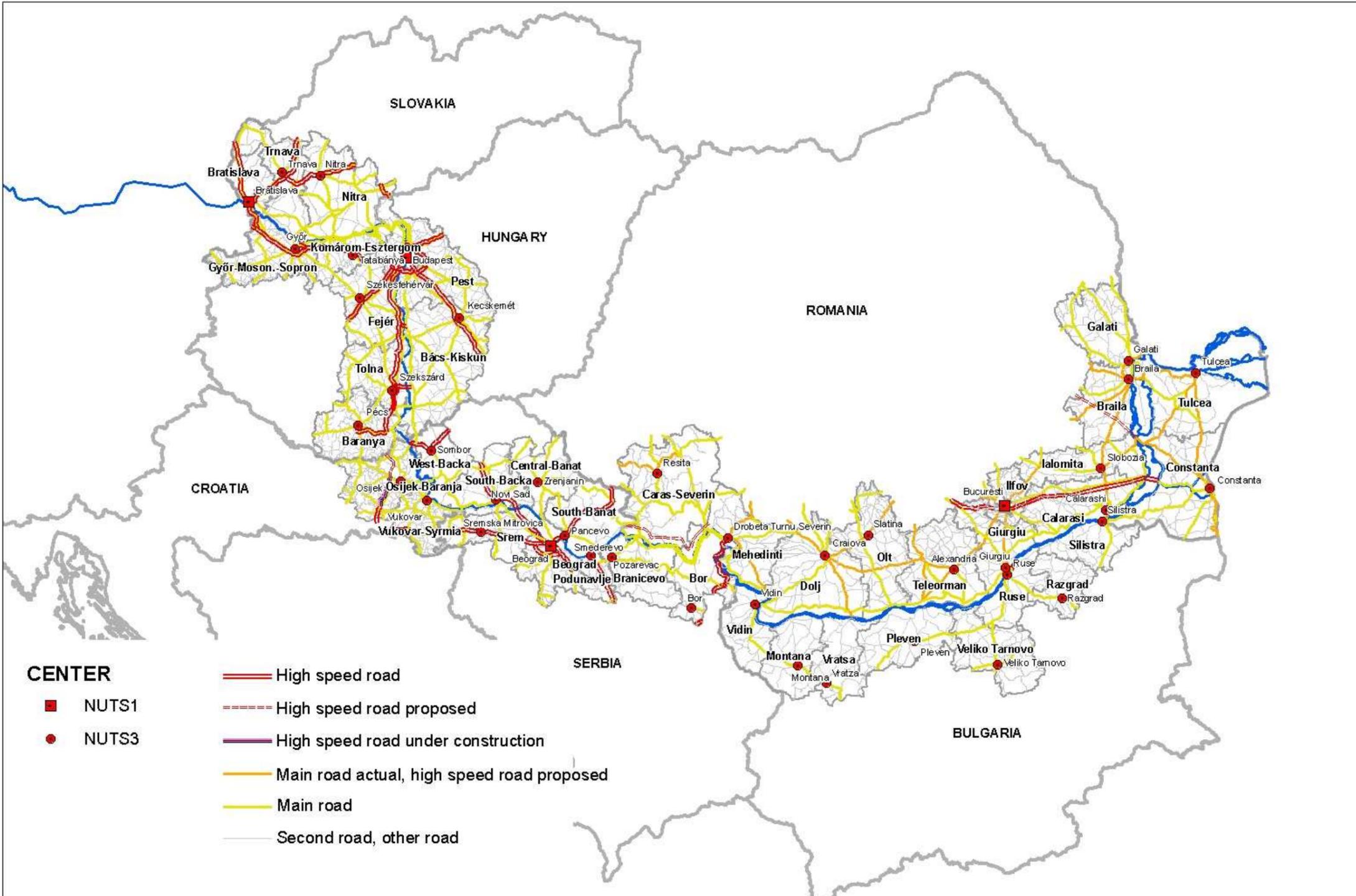
**DATOURWAY**



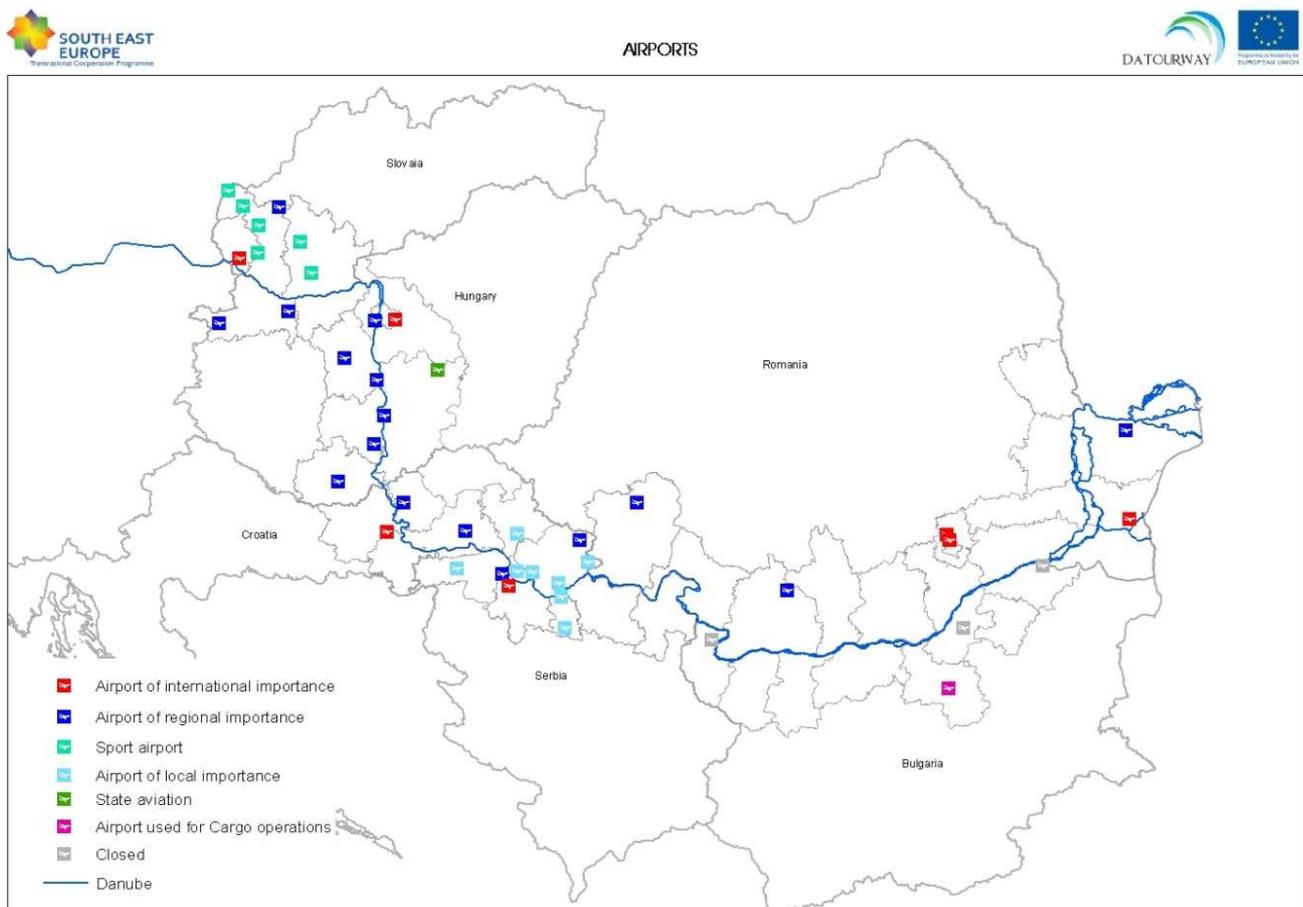
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**ROAD NETWORK**



In the capital cities (Bratislava, Budapest, Beograd, Bucharest) connections are provided by the airports (though neither of them are among the leading European airports in spite of their advantageous location). Osijek has an international (though limited capacity) airport, Pécs (at Pogány) also has a small one with capacity for relatively small planes only, the Romanian airports outside the capital (in Constanta, Tulcea, Craiova and Caransebes) in Bulgaria (Ruse and Gorna Oryahovitsa) are also of lesser importance for tourism.



With regard to transport the river Danube is an obstacle rather than channel. On the Slovakian – Hungarian border there are old and new bridges and more to come, In Hungary south of Budapest both new bridges (at Dunaújváros and Szekszárd) are ironically without appropriate road connection (hopefully this is only temporary). In Serbia Novi Sad and Beograd have bridges. Further down, at Drobeta Turnu-Severin the bridge links to Eastern Serbia. There is one bridge to connect Romania and Bulgaria. The construction of the second one linking Vidin and Calafat is a measure in the EU SEE Programme, but realisation is in delay.



***Ruse – Giurgiu Danube bridge***

The Danube could be a major trans-European navigation thoroughfare. The construction of the Danube-Black Sea waterway has opened an exit to the Black Sea. All Romanian ports are in the DATOURWAY area: 2 maritime ports (Constanța and Mangalia) and 17 naval, commercial and even industrial ports to the Danube (Moldova Noua, Orsova, Drobeta Turnu-Severin, Calafat, Corabia, Turnu Magurele, Zimnicea, Giurgiu, Oltenita, Calarasi, Cernavoda, Harsova, Macin, Braila, Galati, Tulcea and Sulina). The ports on the Bulgarian riverside (Ruse, Lom, Silistra, Tutrakan, Somovit, Oryahovo, Svishtov, Belene, Kozloduy) handle cargo mainly. These ports along the Danube are less developed and do not attract many passengers. In general one can contend that the Danube is underused by passenger traffic in spite of the potentials and attractiveness of the river and the popularity of the river cruises some hundred years ago. A thoughtful, constrained but consistent development of goods as well as passenger transport (avoiding the use of huge freighters and adapting to the ecological requirements) would enhance the importance of the river.

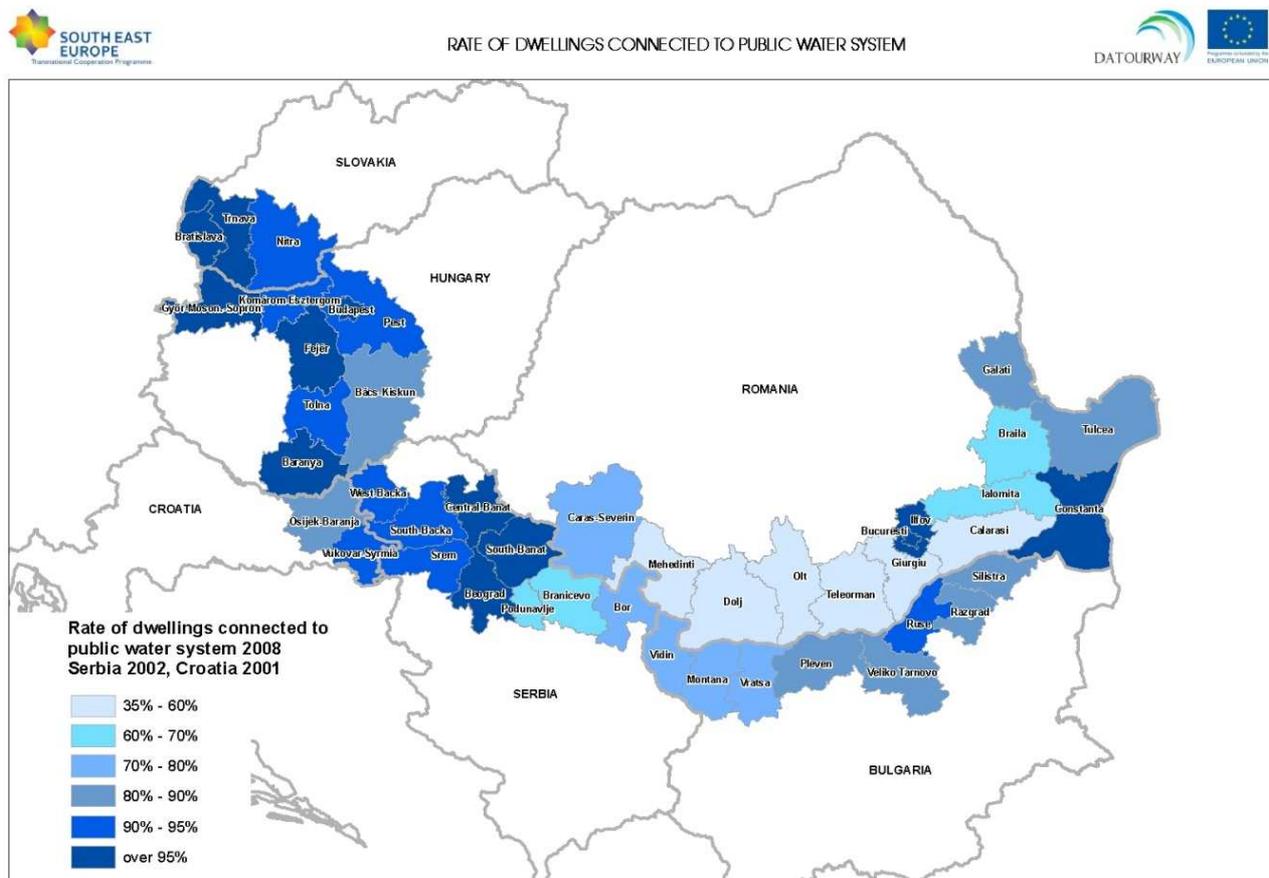


The technical infrastructure of water supply, sewage disposal and treatment, energy supply, solid waste disposal and treatment has a leading position among the civilisation criteria. It is an essential requirement to make up for the gap prevailing in this field all over the area, especially in the south-east section. It should be of great benefit to take advantage of backwardness and apply innovative means and instruments like ecological waste-water treatment, re-cycling of solid waste, energy supply from renewable resources.

In **Slovakia** in recent years there has been a gradual reduction of wastewater discharges into surface waters: – in the period 1995-2005 by 25%, of which 19% goes to public sewer. In 2007, the homes of 3.145 million people in Slovakia were connected to public sewerage network, representing 58.2%. The situation in the project area is as follows: Bratislava region: 85.29%, Trnava region: 51.84% and Nitra region: 46.07%.

All municipalities are connected to the collection of communal waste. Waste is placed onto the regional dumps. The situation is worse in the case of selective waste collection; the standard in different municipalities is noticeably different.

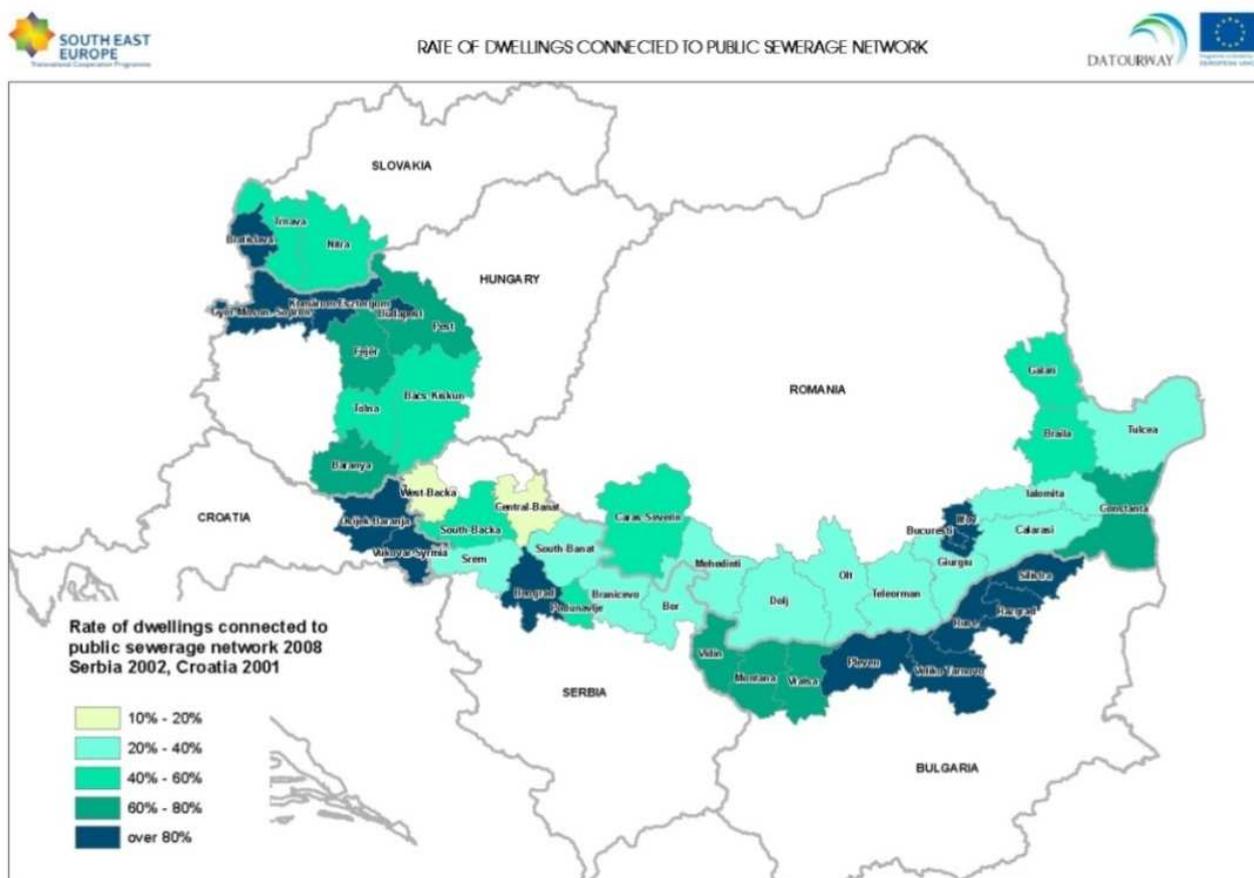
By 2008, every community in **Hungary** – including the counties of the Danube region – had access to running drinking water. The 95.4% ratio of households connected to the public drinking water pipeline network in the Danube region is better than the national average (94.9%). The ratio is above 90% in most of the counties in question with the only exception of Bács-Kiskun County (87.7 %). In this county, the high number of small scattered farms in the outskirts uses their own wells for water supply: this explains the lower ratio.



In most cases, the community public utility supply has been appropriately developed by the time of the survey. As for the number of households connected to the wastewater network, Budapest takes the lead (98.1%). The average ratio in the Danube region is 71.8%. Among the counties in question, the ratio is the best in Győr-Moson-Sopron (84.5%) and Komárom-Esztergom (80.1%) Counties, whereas it is the worst, 46.4%, in Bács-Kiskun County.

The percentage of households served by waste collection in the area under survey is 91.5% on average. It may give rise to difficulties that merely 59% of the recreation areas have access to waste collection services. So what happens to the waste generated at recreational areas cannot be followed, and the absence of collection services is often the direct cause for illegal waste disposal. This may lead to particularly serious pollution in settlements with large recreational areas.

**Croatian** Danube area, due to its specific geological structure is rich in groundwaters. Drinking water for this area is mostly supplied from groundwater sources (95%) through network of public water supply systems. In Vukovar-Srijem County over 95% of the population uses drinking water from the public water system, and in Osijek-Baranya this average is 72%. For both counties, the problem is the improvement of the quality of drinking water, through the renewal of existing and building the new infrastructure.



Waste water management system in the Danube area is at low level related to the required standards, but within the limits of the national average of 45%. In Vukovar-Srijem County, only 52% of the population (5 cities and 1 local municipality) is connected to the sewage system, and in Osijek-Baranya County this one is 45%.

Waste management in the Danube area is challenged by insufficient capacity of existent landfills and many landfills with no standards for waste disposal/management (illegal). According to the estimations, in the Danube area over 90% of the households are comprised, by the organised service of waste collection.



In **Serbia** as for drainage and purification of water, the situation is most unfavourable. Almost no settlement along the Danube has a complete sewage system (together with facilities for waste water treatment).

In the **Romanian** Danube area the water supply network is mostly found in urban areas and in some rural areas. Many rural areas have insufficient water supply network. Treatment stations are few and/or inefficient and system of sewerage and wastewater treatment in urban and rural settlement insufficiency.

As of 2008 10 settlement waste water treatment plants have been built, providing services to the big and medium-sized urban agglomerations in the **Bulgarian** Danube area. There are no waste water treatment plants in three of the district centres (Vidin, Ruse and Silistra).

In the project area 87% of the population is serviced by a waste collection system. Under the National Waste Management Programme, such regional landfills are being built near the cities: Vidin, Montana, Vratsa, Oryahovo, Belene, Lyaskovets, Borovo, Ruse and Silistra.

### III. Potentials, initiatives and actual tourist uses in the DATOURWAY area

In the Danubian counties of the DATOURWAY project area there are ample potentials for short term as well as week-long or even longer tourism. These potentials are not fully exploited, at some places they are not used at all, although all national governments and the majority of local governments are eager to attract visitors and benefit from tourist activities.



*Slovakian – Hungarian Danube section*

Bratislava, the capital city of **Slovakia**, and at the same time one of the most significant spots of the tourism in the country, offers, apart from sights of interests and programs, capacity of congress tourism.

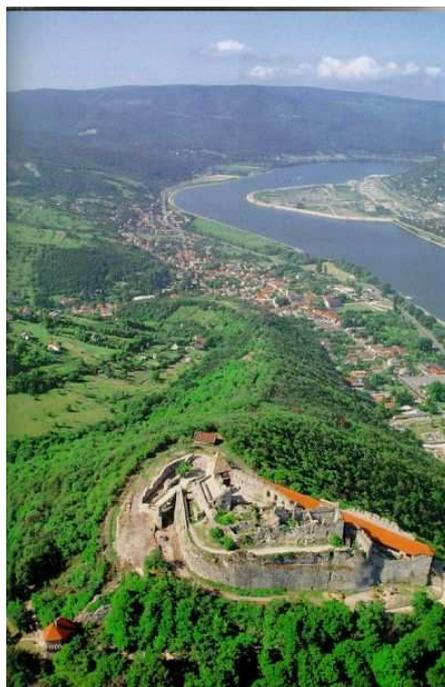
By the Danube dam Hruškov there are active tourism possibilities: cycle and aquatic tourism, windsurfing, recreational complex Slnčné lakes in Senec is centre water and congress tourism from the aspect of the recreation, it is of nationwide importance.

Along the northern section of the project area, on both sides of the Danube in **Slovakia and Hungary** the possibilities to promote tourism are recognized and exploited, though not fully here either. There are facilities for river based activities, canoeing paddling, angling and even short cruising. The web of river branches and oxbows in the beautiful, moving landscapes of Szigetköz and Žitny Ostrov is an excellent, romantic environment for such activities. A big attraction in the area is the city Komárno/Komárom with its large

fortification system and with its city centre. From the aspect of cultural tourism it is very important as an only expansive Roman monument, part of the Danubian Limes, Along the Slovakian Danube section there are many possibilities for water and cyclotourism, wellness and congress tourism, cultural and ecotourism. The potential of protected natural values and the ecotourism is only used at a small extent. In the last few years in different places traditional local events (gastronomical and festivals) were introduced.

Project site (except Bratislava) does not belong to the most important regions of tourism in **Slovakia**. Because of the smaller natural potential and that the attractiveness of the site is closely bound to summer season, which considerably decreases its effectivity of its use of the available capacities. There are efforts to lengthen the season – for example with reconstructing the swimming pools to ensure the winter use. The current trend tends to improve the offer for the selected segments (rural, active, conferential tourism), which has succeeded only partly. Important reason is the delay in the completion of the necessary infrastructure and the fact that the state legislative and the supporting policy do not prefer these areas. Apart from this there are effective facilities missing which would support the marketing cooperation of actors in the tourism of individual destinations.

The tourism attraction of the seven counties of the **Hungarian** Danube area and Budapest has very different features. Although an extremely important link and determining natural and landscape feature, the Danube is not yet frequently used for passenger- or cruise-ship sailing. In towns and villages with no direct contact with the Danube the river plays insignificant role, and the focus falls on the unique attractions of the respective town or village.



***Visegrád and the Danube Band***



Győr-Moson-Sopron County serves as a gate with respect to tourism arriving to Hungary from the West. Over one-third of the tourists visiting Hungary arrive to the country via a border crossing in Győr-Moson-Sopron County. Aside from busy tourism corridors and a transit function, the county plays a notable role in tourism due to its built attractions of international and regional significance, folk traditions, its 50 castles and mansions, as well as its castle hotel and cultural events. Győr and Sopron, two cities with county status, are major tourist attractions. Komárom-Esztergom County is one of the most important “heritage sites” in Hungary in terms of archaeological remains and built values left from the Roman times. The Danube Bend with its dramatic landscape, steep slopes and rich vegetation and historic monuments, cultural heritage, spas is an especially important tourist environment.

Pest County, also known as the Central Hungarian (Statistical) and the Budapest-Middle-Danube (Tourism) Region is often called the “heart” of Hungary. All the major railway lines are headed towards Budapest; all the main roads of national scale intersect here. Over one third of the total guest traffic, and over half of international guest traffic is in this area.

Its undisputable role throughout history and on terms of administration is explained by its geographical location. The capital city, Budapest awaits visitors with the highest number of monuments, historic memorial sites and cultural events.

Fejér County is one of the most developed counties in Hungary with a central location, a diverse natural environment, a rich palette of beautiful cultural values and a relatively well-developed infrastructure. Both Lake Velence and the Danube provide favourable opportunities for waterside holidays, water sports and angling. Sárvíz and the inner lakes are also excellent places for the latter activity. The Northern and – to a smaller extent – Southern parts of the county as well as the Sárvíz valley connecting the two accommodate a substantial amount of landscape in nature-like condition that would provide good potential material for the development of eco-tourism.

Bács-Kiskun County owes its attractions mainly to its natural values. The county’s tourist potentials are considered to be favourable, considering the – compatible or possibly compatible on the international market – product groups highlighted in the national strategy (medical tourism/wellness; holidays; active tourism; cultural and heritage tourism; rural tourism, as well as gastronomy and wine tourism; congress, business and incentive tourism [MICE]). The county has positive development potentials with respect to nearly all these priority products.

The main tourist attractions of Tolna County are the Germenc-Gyulaj wildlife reserve within the Danube-Drava National Park and the fishing sites in the oxbows of the Danube. The natural assets in the region are partly a basis for developing eco-tourism and partly exploited by hunting tourism. The most significant attractions and tourist destinations are along the Danube and around Szekszárd.

Following Budapest and the top four counties bordering Lake Balaton, Baranya County has a stable position as an above average county in terms of guest nights.

The characteristic tourist attractions of the region are amply present in Baranya County too (varied natural sites, meeting of different eras and cultures, ethnic diversity). The county possesses attractions of international significance in all three of the categories mentioned above. Pécs (Cultural Capital of Europe 2010) and the historical sites of the county, as well as



its thermal spas, beautiful vineyards, folk culture and living folk art rank among the prime attractions of Hungary. There are also many secondary attractions (churches, folk traditions, artisans, hunting, fishing and other water-related attractions), which are situated sporadically, due to a settlement network characterised by small villages.

The geographical position of **Croatian** Danube area is unfavourable in comparison with other Croatian counties due to the distance from the most important tourist flows and main markets. The characteristic tourist attractions in the area are the various forms of protected landscapes (Kopački rit, Danube-Drava NP, Erdut, Spačva river area, Vuka river and Virovi), the rich cultural heritage – one of them is element of immaterial heritage protected by UNESCO (Spring procession of Ljelje/Kraljice), two objects on the tentative list of UNESCO (Croatian part of the Frontiers of the Romanian Empire: Danubian Limes along the Danube). Various cultural heritage sites include archaeological remains from Roman and pre Roman period, attractive churches, fortresses, castles, ethnological heritage, old wine cellars and monuments from recent history.



*Eco centre Zlatna Greda*

National park Fruška gora and Đerdap, also special nature reserves of **Serbian** part of Danube area, as important elements of natural heritage are significant tourism potential, but only one part of them is affirmed for tourism sector. This territory has other natural resources with potential for the development of spas and wellness tourism. There are 7 spas

in the area and only the City of Beograd we can find 16 SPA and wellness centres. In the territory of the Serbian Danube basin are some of the most important archaeological sites of this part of the Balkans. The importance of the Danube as a communication and economic resources has placed the course of history in this area numerous villages, fortresses and settlements. The first archaeological finds are dating from the period of prehistory. It is a Lepenski Vir near Majdanpek and Vinča near Grocka and Rudna glava in Majdanpek that stand out as archaeological sites of great importance. Special features of this part of the Danube basin are numerous remains of Roman forts and towns. Danube, over the centuries represented the natural border of the Roman Empire. The number and importance of cultural monuments in this area is the result of the rich and turbulent history of this region, who over many centuries been a major crossroad in the Balkans which have gained and bypassed the civilizations, cultures and peoples. On the territory of the Danube area in Serbia is located 40 cultural properties ranked as good of great importance.



***Castle in Bac***

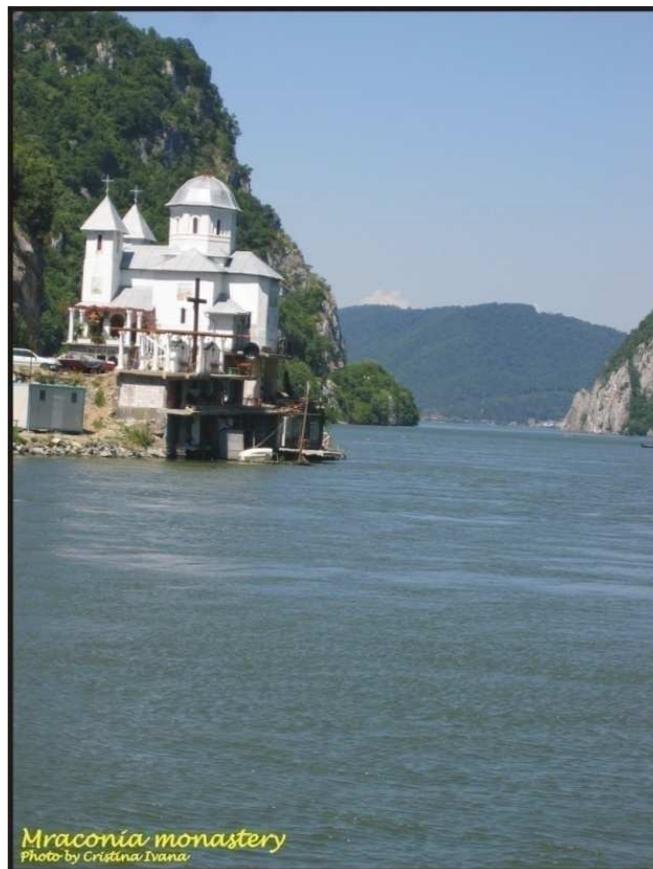
Very important tourism offer in The Serbian part of Danube catchment area are events, especially in the municipalities in the Vojvodina Region, which has both strong traditions and developed channels of supply and implementation. Assumption is that in Vojvodina during one year is holding over 600 different events that at least 100 can be called tourist, while



others are festivals, parades, games, sports and recreational events, meetings, fair and exhibitions, tastings, cultural events. Of the additional attractions area as follows: farms and indigenous representatives of the rural way life, hunting, fishing and cycling.

The extraordinary, beautiful, dramatic landscape by the Iron Gate of the Danube connects Serbia and **Romania**. In this part of the region besides the river-flow, the cliffs and woodland the archaeological sites.

Tourism has broad, as yet unexploited potentials both in the mountainous areas and on the Romanian Plain bordered by the Danube.



The tourist activity is currently concentrated in the west counties (Caras-Severin) and south-east counties (Constanta, Tulcea and Braila) where the facilities are more available. In some counties, like Tulcea or Caras-Severin, tourism can be a real means of economic recovery, an alternative to agriculture or industry. Accommodations, like pensions and hostels have recently opened to serve visitors of rural tourism, agro-tourism, mountain tourism, silvo-tourism.

In the Danube riverside area, several (namely 17) resort places with traditions in mountain, seaside, balneal-climatic tourism are internationally and nationally recognized especially in Caras Severin (Băile Herculane, Crivaia, Semenice, Trei Ape), Ialomita (Amara), Ilfov (Snagov)



counties. Constanta (Cap Aurora, Costinești, Eforie Nord, Eforie Sud, Jupiter, Mamaia, Mangalia, Neptun-Olimp, Saturn, Techirghiol, Venus), with the seaside resorts is the main tourist concentration. Tulcea the unique wetland area of the Danube Delta is of course a nature conservation area and is less developed for tourism.

A relatively broad variety of accommodation and tourist facilities are concentrated in the resorts places and urban areas. The rural areas are underrated in this respect. The natural conditions offer possibilities for recreational activities, starting with hiking, horse riding, cycling, golf, but the diversification of corresponding infrastructure for the tourists is relatively low.

Despite the rich balneal, therapeutically natural resources present in counties like Braila, Ialomița, Caras-Severin, Mehedinți, Constanța, the spa resorts and thermal baths are largely dependent on social tourism (subsidized by the state) and the medical facilities in the spa resorts are not up-graded.

In **Bulgaria** the Danube area landscape comprises lowlands, plains, hills and mountains.



***Bulgarian Danube section***



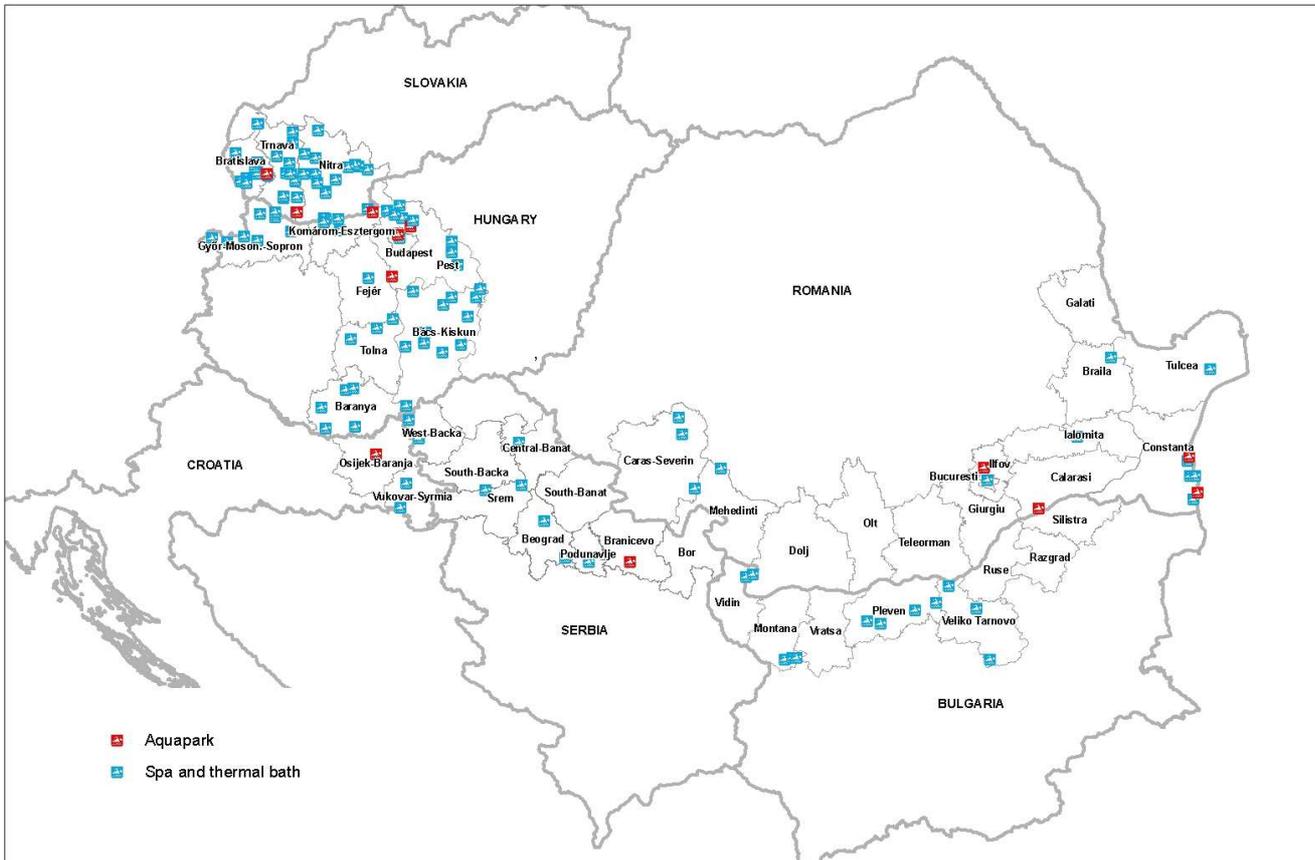
The river network – outstanding with its high density – falls within the Black Sea water catchment area. A wide network of artificial lakes has been created in the area. The lakes are used for sport fishery. The Danube River, the main component of the hydrographic network in the Danube Area is also natural resource which can serve for the purposes of water and fishing tourism development. The abundance of big game species as well as small migratory birds is important for hunting tourism.

The natural resources with potential for spa and wellness tourism are mineral springs flowing in 5 areas in the region. Essential elements of the landscape are the monuments and sites of historic heritage. A cultural and historical site in the Danube Area has been included on UNESCO's World Heritage list the Rock-hewn Churches of Ivanovo.

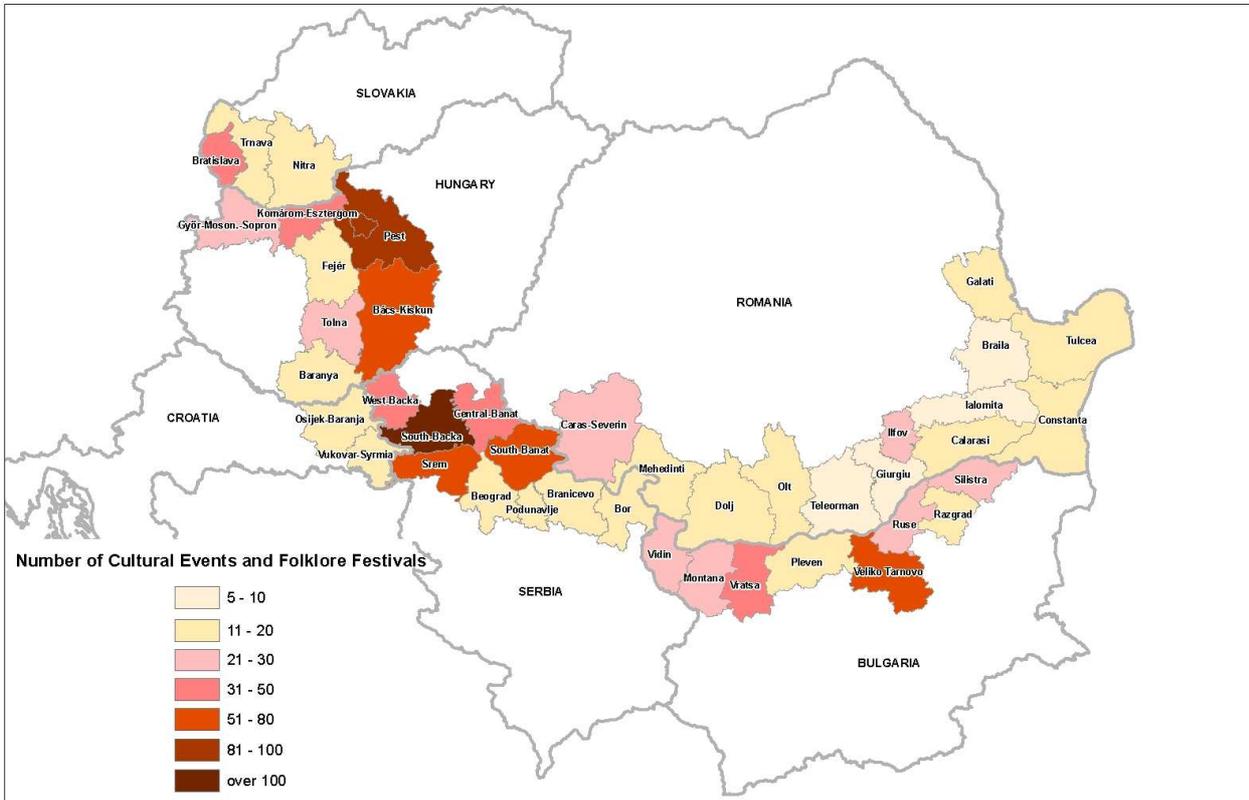
Other ancient monuments are the remains of Roman fortresses in the proximity of Vidin and the Roman cities (Nikopolis ad Istrum, founded by Emperor Trajan and Nove). The foundations of basilicas from Roman times have been preserved such as the one in the ancient city of Storgosia (which laid the foundation for today's Pleven). Today's Ruse preserves the remains of the headquarters of the Roman fleet Sexaginta Pristas (Ruse), founded by Emperor Vespasian. The remains of the Roman city Nove were discovered and exhibited in the proximity of today's village of Gigen (Gulyantsi). There are some medieval cultural and historical sites which have been preserved such as the medieval fortress Bdin and Dorostorum – Drustur (in Silistra).

Veliko Tarnovo has been established as an important tourist destination because of its cultural and historical heritage. There are 906 cultural and historical monuments there. Monuments of material and spiritual culture have been preserved from the National Revival Period. The following places are National Revival centres with preserved cultural and historical monuments: Veliko Tarnovo, Gorna Oryahovitsa, Elena, Lyaskovets, the village of Zlataritsa, Ruse and Svishtov.

Another specific type of tourism resource of interest for the so-called religious tourism is the multitude of active monasteries. 15 monasteries are around Veliko Tarnovo. One of the biggest sensations in the antiquity archaeology is the Thracian tomb near the village of Sveshtari (Razgrad District), which is a Thracian – Hellenic tomb dating from the first half of 3<sup>rd</sup> century BC.

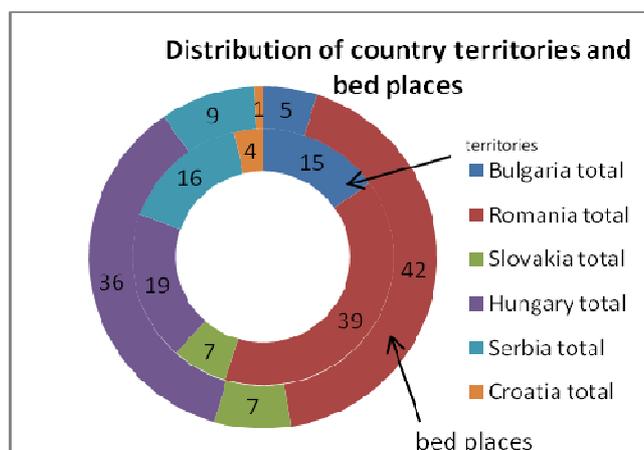


*Junakovic SPA centre Apatin*



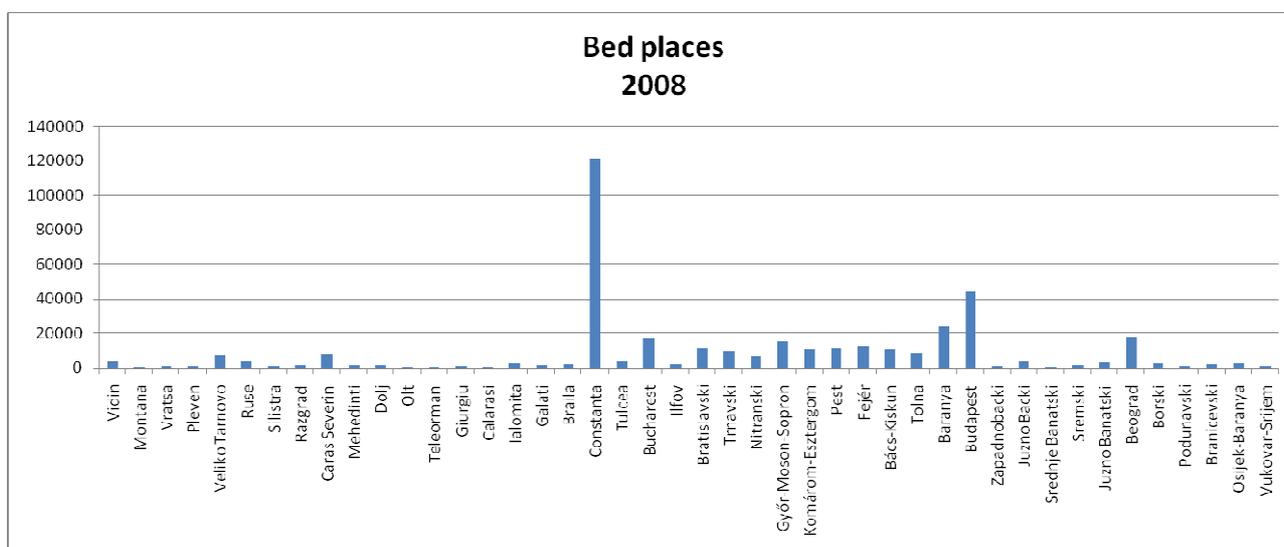
In the DATOURWAY region of 6 countries there are altogether 384 tourist accommodations. Nearly 47% is in Romania, 40 % in Hungary. The rest of 13 % is share by the other four countries in more or less accordance with the territorial distribution. Some aspects are worth noting.

- The share of Hungary form accommodations is nearly twice of the country's territorial share.
- The respective share of Romania and Slovakia are more or less in correspondence with their territorial ratios.
- In Serbia, Bulgaria and Croatia the provision of accommodation is insufficient along the Danube.

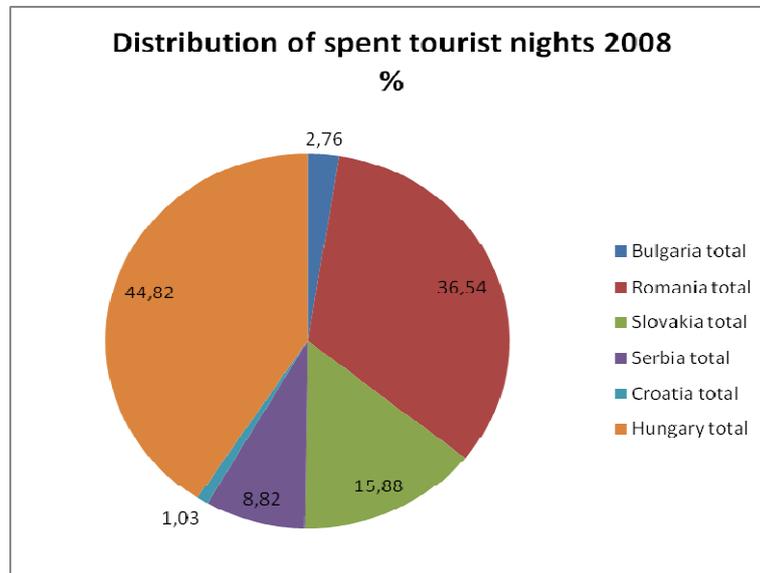


A detailed analysis of the territorial distribution of accommodation reveals that Constanta, the great seaside resort centre comprises one third of the total number of bed places in the DATOURWAY region. It is followed by the concentrations in Budapest and in County Baranya, and then by the other capital cities (Belgrade and Bucharest) of the region. The scope of accommodation of Bratislava is roughly the same as the average of the Hungarian counties. All the other counties provide insignificant number of bed places. The lowest is the figure for Olt County (507).

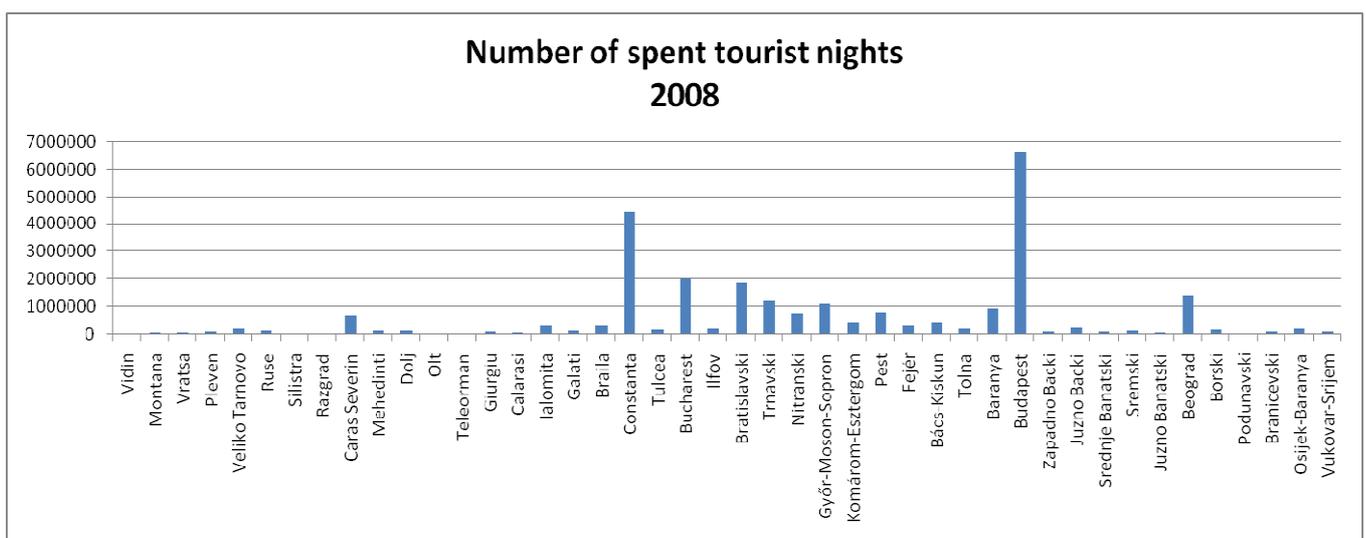
It needs to be noted that in the countries of the DATOURWAY region the riverside counties are not among the most important national tourist destinations. In Romania, Bulgaria and Croatia the Danube riverside is peripheral – both in terms of tourism and social, economic development – compared to the coastal tourist paradises. This applies even to places of outstanding rates of accommodation and tourist turnover, because these latter are not dependent on river-based tourism. Constanta is a significant resort centre of Romanian seaside, the capital cities and their regions are multifunctional tourist centres. It is therefore obvious that there is still much to be done for the development of infrastructure for the tourist use of the Danube as a major tourist asset.



In 2008 in the DATOURWAY region nearly 2.7 million tourist nights were recorded in the following country distribution:



It is in line with the distribution of bed places that the majority of guest nights were spent in the riverside areas of Hungary and Romania. There is, however, some shift of proportions due to the seasonality of tourism. Tourist turnover is the highest, where there is abundant offer of accommodation and also where the tourist attractions of the capital cities are less dependent on seasonality. For example, Constanta comprises 32 % of accommodation and 17 % of tourist turnover, while Budapest has 12 % of accommodation and 26 % of tourist turnover in the DATOURWAY region.



## IV. Conflict areas

### *IV.1. Conflicts between tourism and the state of the environment*

Tourism is the human activity which is most demanding in relation to the state of the environment. Moreover, different sorts of tourism have different criteria. The highest requirements on environmental quality are raised by health and eco-tourism. Cultural tourism, city visits are somewhat more tolerant, though highly demanding in terms of culture and events.

The conflict areas are identified with regard to the following aspects: visual pollutions, environmental pressures and environmental threats, as well as environmentally sensitive areas imposing limit on traffic and any human intervention.

In the DATOURWAY area the following anthropogenic environmental pressures are typical:

- Along the bank of the Danube, in the industrialized zones of Slovakia (Bratislava, Gabčíkovo, Komárno), Hungary (Komárom, Esztergom, Vác, Budapest, Budaörs and Dunaújváros), Serbia (Novi Sad, Beograd), Romania (Craiova, Constanța, Braila) there are continuous rows of manufacturing plants and also abandoned quarries and in the Delta region oilfields that disturb and restrict tourism with their air as well as visual pollution.



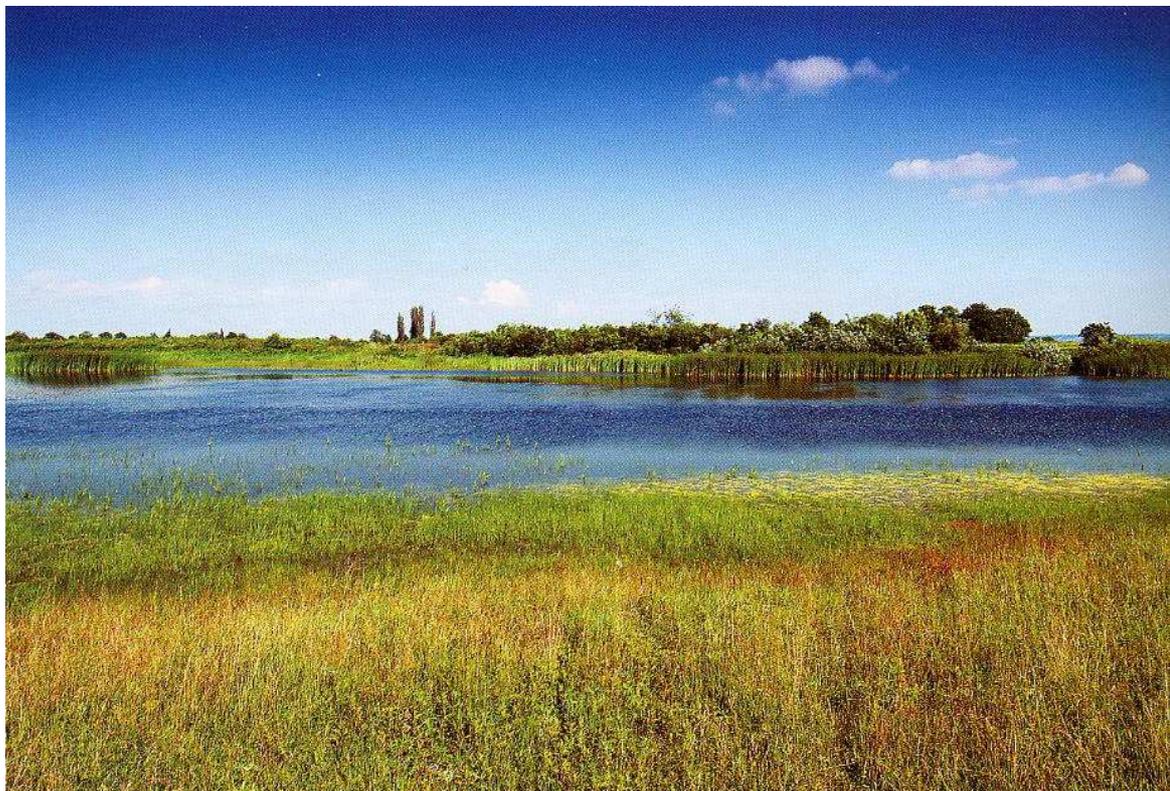
**Komarno**

- Further growth of traffic may cause further air pollution problems to areas that are already burdened with busy road traffic, polluting factories and the concentration of city traffic.
- The waste water and even solid waste discharge from cities and industrial zones restrict and even undermine the recreational use of surface waters and the long term protection of underground water bases. It is a serious assault against the environment and tourism too, when the rate of public water supply service is not matched by the appropriate rate of sewage disposal network. Even more critical is the situation, however, when the waste water is collected and then discharged in a concentrated manner into an underground or surface water recipient.
- Another environmental threat in low lying areas all along the Danube is the risk of flood. Although there are appropriate flood prevention works especially in the upper section and the missing elements are to be developed in the near future, climate change may cause unexpected, and in many cases unpreventable flood events. Therefore, development projects for these areas must always take into consideration existing environmental risk. At high banks – in the Danube Bend for instance – potential slide of the river walls limits a riverside building opportunities.



***Flood at Budapest***

- Environmental constraints of tourism development may also arise from precaution and care. The water bases and water quality protection areas along the Danube present obstacles to tourism-related developments just like the large, environmentally sensitive, nature conservation areas limit the tourist capacity of the region.
- The low and inadequate supply of sewage disposal and treatment in less developed and rural areas present a high and serious environmental risk.
- All along the DATOURWAY area there are environmentally sensitive areas. The most vulnerable are the water bases and reserves and water quality protection areas. There are also substantial stretches of environmentally sensitive areas which need special protection from all further interventions.



***Nature Park Ponjavica***

- Uncontrolled and undisciplined tourism may itself be and actually is an environmental threat: mistreatment of the landscape, littering, noise, injuring the flowers, trees and shrubs, pollution of the air, water and soil are harms caused by irresponsible tourists.
- The ecological quality of the river itself needs special care and protection. An intensive development of large scale goods transport is a threat of the survival of the ecological systems and also undermines the possibility of riverside and river-based tourism.



#### ***IV.2. Inadequacies in the relations between tourism and human resources***

In the development of tourism, social barriers are regarded as „soft” ones. The social barriers are associated with the limited capacity of the community to keep pace with the demands imposed by global development and to generate locally based businesses. In several cases the concern for survival may even force the communities to invite entrepreneurs from outside the area, and let them exploit the local potentials, untapped resources. In such cases there is a risk that the local community is more or less excluded from the benefits of the process, which may even be unsustainable.

The problems are controversial. Relatively low economic conditions usually mean inferior quality standards of the given social welfare system, services, housing, infrastructure, and thus restrict the capacities of tourist flow. Under such conditions, adequate services are not available to create a form of tourism that could generate significant revenues, a form of tourism which could contribute to improving economic diversity. However, tourism alternatives that are nomadic or close to nature, are feasible in some areas, which are though underdeveloped, but where landscape is beautiful and nature assets are abundant.

The arrival of entrepreneurs from outside often does not contribute to local economic prosperity, as local communities usually do fear that imposing local business tax would be seen as a „business-unfriendly” measure.

In interconnected regions with multiple tourism potentials, development and marketing efforts based on local cooperation seem to be the way forward. These allow communities to play complementary roles in building capacities and developing local attractions.

Social barriers are shown by a relatively low level of entrepreneurial activity and low participation in tenders. This is partly explained by demographic reasons as well as by a certain degree of economic instability (outward migration, ageing and a shortage of own resources). In view of these factors the following description applies to the area.

In areas of low economic activity there are only a few businesses offering catering and accommodation that have the necessary human resources to provide an adequate level of service to visitors. In addition to meeting the criteria for launching a new business, those who are active in the tourism sector should also be well prepared, well informed and should possess the necessary professional knowledge and communication skills.

The combined presence of these three factors is typical in most urban centres and in several rural communities too (for instance, in Slovakia, Bulgaria and south-west Hungary) Entrepreneurial skills and practice are, however, missing in most peripheral rural areas. Further, serious limitations are in language skills as well as skills in modern hospitality including communication, trustworthiness, creativity.

Closeness to nature, traditional, healthy lifestyle and environment, and the joint potential of arts, craftsmanship and gastronomic services are important advantages of rural areas, and are increasingly sought after in domestic tourism as well as tourism in general. The demand and capacity for new business start-ups and participation in tenders building on these advantages must be promoted all over the region.



### ***IV.3. Infrastructural barriers to tourism development***

The importance of the supply of tourist infrastructure is justified by the fact that the meeting most of these criteria of benefit for the local community anyway. The supply of healthy drinking water, sewage disposal and treatment, appropriate housing and repair of buildings, availability of commercial, catering, health and cultural services quality ensure better living conditions side by side with providing for visitors.

If all other conditions are met, the principal measure to assess the utilisation of tourism-related potential is the quality standard of reception capacity, which depends on various factors ranging from accessibility to the tourism infrastructure and services.

The expectations of tourists with regard to the accessibility of destinations can be rather different and even contradicting: on one hand – especially for short trips – there is a requirement for reaching the destination with no time-loss, while travel time is relatively indifferent in the case of longer holidays, and on the other hand, in many cases there is also a preference for areas closed off from traffic. The offer of other institutions destined to serve visitors match the local level of development. The following section gives a territorial description.

- Tourism-related infrastructure is not satisfactory in areas where accommodation capacities are low and there are only a few catering and retail facilities.
- Access to an acceptable range of such services of an adequate standard is an essential prerequisite of tourism development, especially for the utilisation of attractions offered by nature, culture and the built environment and for turning the given region into a well-managed destination.
- The Danube area has diverse tourist attractions. The most important of these are the natural assets linked to the still existing oxbows and other riparian sites, the rich cultural heritage, built environment and event calendar, as well as traditional local products and folklore.
- There is strong demand for infrastructural development and marketing management in areas that are rich in tourist attractions.
- In order to be able to launch capital-intensive investments in these areas, the operative burdens of small enterprises would have to be eased in addition to intensifying tendering activity and strengthening cooperation.
- The supply in accommodation services is weak in the communities along the middle and lower stretches of the Danube, while catering and retail services are missing mostly in communities lying farther away from the banks of the Danube.
- The most striking conflict arises in areas along the Danube river which are rich in attractions, but lack tourism infrastructure, namely the area around the Danube Bend – excluding big towns - and small communities of the Upper Danube section, and the communities situated on the wide stretches of the sparsely populated areas below (south of) the Budapest metropolitan region, by the middle and lower Danube sections, around the Iron Gate, the Romanian Plain , some rural parts along the river in Bulgaria and the Danube Delta.

- It is associated with infrastructure deficiencies that river-based tourism (paddling, canoeing, yachting) is almost non-existent all along the river, with the noteworthy exception of communities along the Slovakian section and along the north-western section in Hungary, though here there is a visible trend of decline. The limited occurrence of river-based sports on the Danube is all the more deplorable in view of the vivid traditions of cruising both on the middle and lower Danubian section.



*Cruiser near Mohács*



## V. Basic elements for the joint tourism strategy in the DATOURWAY area

### V.1. SWOT

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Favourable geographical location and transport links of the project area, integrating role of the Danube River with other countries</li> <li>• Access to European tourist markets via the river</li> <li>• Continuous coverage of a diverse network of settlements</li> <li>• Strong capital cities and regions, dynamic medium size cities</li> <li>• Improving educational level and skills</li> <li>• Entrepreneurial drive</li> <li>• Development of advanced urban services</li> <li>• Organic-farming initiatives</li> <li>• Diversification of local economies in several areas</li> <li>• Growing interest in tourist development</li> <li>• Diversity of cross-border cooperative activities</li> <li>• Technological development of manufacturing</li> <li>• Unique areas of natural beauty</li> <li>• Attractive cultural landscapes</li> <li>• Commitment to landscape protection</li> <li>• Rich and diverse architectural and archaeological heritage</li> <li>• High quality of cultural programs and events in cities</li> <li>• Respect and celebration of national, regional, local cultural traditions and</li> </ul>	<ul style="list-style-type: none"> <li>• Substantial ratio of peripheral areas</li> <li>• The Danube river is currently a natural barrier rather than promoting integration and cooperation.</li> <li>• Underused river based tourism (canoeing, nautical etc.) on the south section of the river</li> <li>• Environmental and social challenges in the urbanized areas ,unstable situation of small towns</li> <li>• Deprived rural areas; urban – rural dichotomy</li> <li>• Territorial disparities</li> <li>• Decline of population except in the suburban rings,</li> <li>• Out-migration of educated young people</li> <li>• Inadequate language skills and skills for tourist services</li> <li>• Growing unemployment, long-term unemployment</li> <li>• Decline and closure of manufacturing industries</li> <li>• Deprived areas dependent on subsistence farming or a single manufacturing company</li> <li>• Crude human interventions changing the morphology of landscapes and the rivers</li> <li>• Conflict between nature protection and forestry: degradation of forests</li> <li>• Shortage of resources for heritage protection: decay of historic monuments</li> </ul>

<p>products</p> <ul style="list-style-type: none"> <li>• Abundance of thermal water resources, growing number of spas</li> <li>• Adequate coverage of road network</li> <li>• Motorway developments</li> <li>• Spread of advanced communication</li> <li>• Hospitality of the population</li> </ul>	<ul style="list-style-type: none"> <li>• Scarcity of tourist attractions in some rural areas</li> <li>• Lack of motivation to highlight local assets of tourism</li> <li>• Low quality standards of tourist services in some urban and rural areas</li> <li>• Inadequacies of the environmental culture in some areas</li> <li>• Irresponsible tourist behaviour causing environmental pollution and degradation</li> <li>• Accessibility constraints, inadequate road network especially in the rural areas</li> <li>• Poor housing conditions in deprived rural areas</li> <li>• Lack of a joint tourism development strategy and tourism destination management</li> <li>• Weak networking of tourism development stakeholders</li> </ul>
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<b>OPPORTUNITIES</b>	<b>THREATS</b>
<ul style="list-style-type: none"> <li>• Broad opportunities for transnational cooperation</li> <li>• Forthcoming European Strategy for the Danube Region</li> <li>• Increasing permeability of national borders</li> <li>• Ease of national conflicts</li> <li>• Social and cultural policies promoting equal opportunities</li> <li>• Spread of new, eco-friendly lifestyles</li> <li>• Increase of social responsibility of companies</li> <li>• Growing interest in eco-tourism and landscape-friendly recreation</li> </ul>	<ul style="list-style-type: none"> <li>• Growing transnational, regional and local disparities</li> <li>• Increasing East-West dichotomy at the European level</li> <li>• Depopulation of some rural areas</li> <li>• Economic and social difficulties involving regional / ethnic conflicts</li> <li>• Out-migration, emigration of young, educated groups</li> <li>• Hazards of climate change: storms, fires, desertification, inundation</li> <li>• Intensive competition in the tourist market constraining quality improvement and preference of cheap</li> </ul>

<ul style="list-style-type: none"> <li>• Discovery, exploration, popularity of the Danube and the riverside as assets and places of tourism and recreation</li> <li>• Development of complex tourist packages comprising cultural entertainment, sports, open space activities</li> <li>• Offer and demand of diverse, high quality local products: food, drinks, crafts</li> <li>• Mobilizing impact of flourishing tourism on local economies and social behaviour</li> <li>• Seasonal extension some tourist activities (e.g. cultural events, conferences combined with thermal water based tourism)</li> <li>• Benefiting from the seasonal character of tourism: preparatory activities, community development during the low-key season</li> <li>• Good prospects of EU supported transport (rail + road) developments</li> <li>• Improvement of cross-border links</li> <li>• Local developments (nature conservation, cycle routes)</li> <li>• Rewarding experience of successful initiatives</li> </ul>	<p>solutions</p> <ul style="list-style-type: none"> <li>• Mass tourism and exploitation of the landscape at peak seasons</li> <li>• Subsistence problems in off-season periods</li> <li>• Constraints on local, small scale developments in period of economic crisis</li> <li>• Difficulties in raising motivation of the elderly, rural population</li> <li>• Pollution, environmental degradation undermining tourist development</li> </ul>
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