

DATOURWAY

The national analysis of the territorial tourism strategy

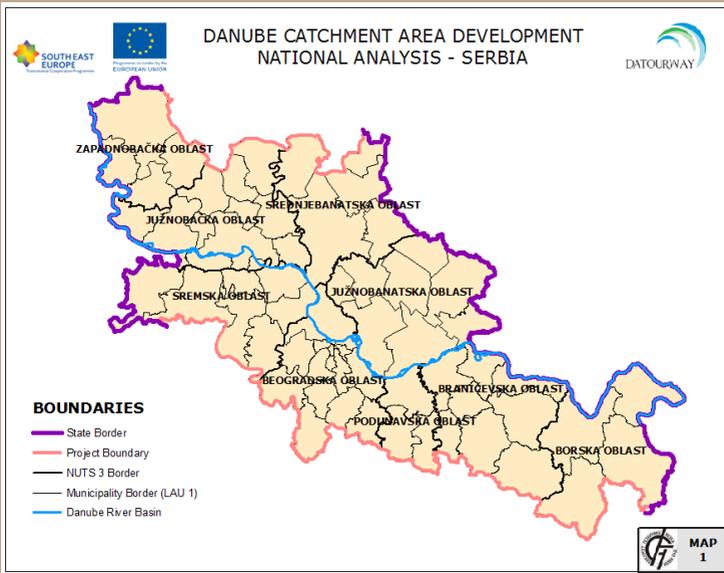
Serbia



Position of the DATORWAY area

The Danube River is one of the most important factors for economic, urban, cultural and historical development of Republic of Serbia. It is the factor of effective European cooperation, as well as the national and regional development, based on potential of the river to intensify agriculture through irrigation, development of industries with linked to cheap water-borne transport, shipping, port activities, seasonal recreation and cultural tourism.

The Serbian part of Danube catchment area covers 9 counties (NUTS 3 regions) bordering the Danube, which are part of the three NUTS 2 regions, comprising 73 municipalities and 867 settlements with a total area of 29 272 km² or 33,1% of Serbia.



Danube runs through Serbia in the middle part of its course, in the length of 588.5 km, of which about 362 km through the territory of Vojvodina. Flowing through the area of the Pannonia Plain (so called Pannonia sector), the Danube has a gradual descent and slow speed of flow.

In the Pannonia sector, the Danube is timid and, due to the small descent, its course is characterized by numerous meanders. In this region, it also receives large tributaries such as the Drava, Tisa, Sava, Morava and others.

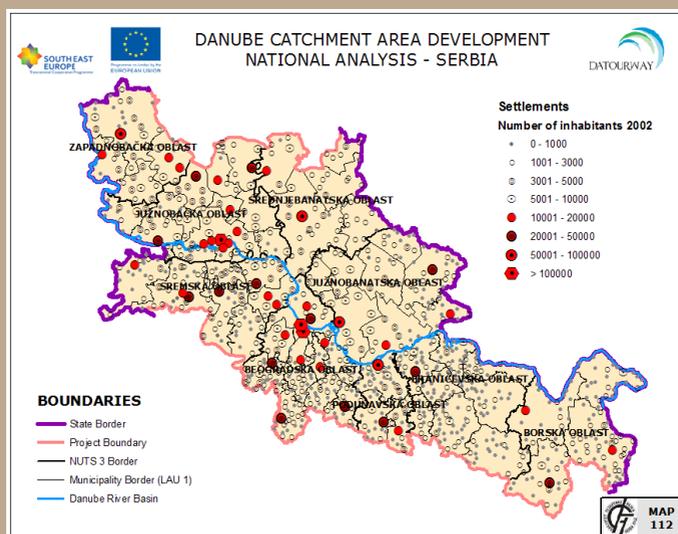
Datourway Area in Serbia is the most populated and the most developed area in the country. Extremely rich cultural heritage of the Serbian part of Danube catchment area are important prerequisites for effective development of tourism.

Belgrade and Novi Sad with its surroundings represent main tourism destinations for short breaks and M.I.C.E. tourism. They are the most developed tourism destinations in the Serbian part of Danube catchment area.

There is a great potential for rural tourism development, especially in the municipalities on Danube bank. In the Serbian part of Danube catchment area is a significant number of rural tourism facilities (38 farms, 16 registered villages housekeeping and 28 ethno houses).

Settlement network and characteristics

The settlement density analysis in the Serbian part of Datourway area shows regional differentiations: the lowest density is in Zapadna Bačka and Srednji Banat county (1,7 settlements per sq km both). The highest density is in city of Belgrade (5,1 settlements per sq km) and Braničevo county (4,9 settlements per 100 sq km).



Most of the counties in the project territory have population decreasing trend with the exception of South Bačka and Srem county. This is direct consequence of intensive economic development of Novi Sad urban agglomeration and very active urban sprawl development between Novi Sad and Belgrade (along the corridor X – Indjija, Stara Pazova, Nova Pazova).

The settlement network in the Serbian part of Danube catchment area can provisionally be divided in two parts: the northern part (north of the Danube and the Sava river) and southern part (southern of the rivers). The northern part is Vojvodina region with the relatively structured and balanced settlement network.

NATIONAL TOURIST DEVELOPMENT CONCEPTS, PROGRAMS

Tourism Strategy of the Republic of Serbia

The Government of Serbia in 2005 adopted a Strategy for Tourism Development in Serbia. This strategy is faced with the fundamental aspects for the promotion of tourism development. First of all, it defines the framework for competent authorities in the tourism sector and splits Serbia into four clusters:

- Vojvodina - water treasures, Pannonia delight
- Belgrade - seductive and exciting
- South-West Serbia - history and tradition with pleasures in nature
- South-East Serbia - still undiscovered

According to the Strategy for Tourism Development in Serbia the highest priority is given to the following products:

- Holidays in cities, business tourism + MICE and events
- Touring, special interests
- Nautical
- Spa/wellness, mountains and lakes, rural tourism.

Plan for the economic development of Vojvodina

Plans for tourism development are also implemented at the provincial level.

In the Provincial Secretariat of Economy one of the main components is the development of nautical tourism NTD. Implementation of this program envisaged the construction of a network of marinas on the Danube in Vojvodina. The goals of the NTD are as follows:

1. Development of nautical tourism on the Danube
2. Capacity building nautical infrastructure: marinas, bridges, ports, tourist attractions on the water, etc.
3. Attracting tourists in Vojvodina
4. To link Vojvodina, as a region, with tours along the Danube
5. Tourism promotion and economic development environment in the vicinity of nautical tourism facilities



Master plan of tourism destination Gornje Podunavlje

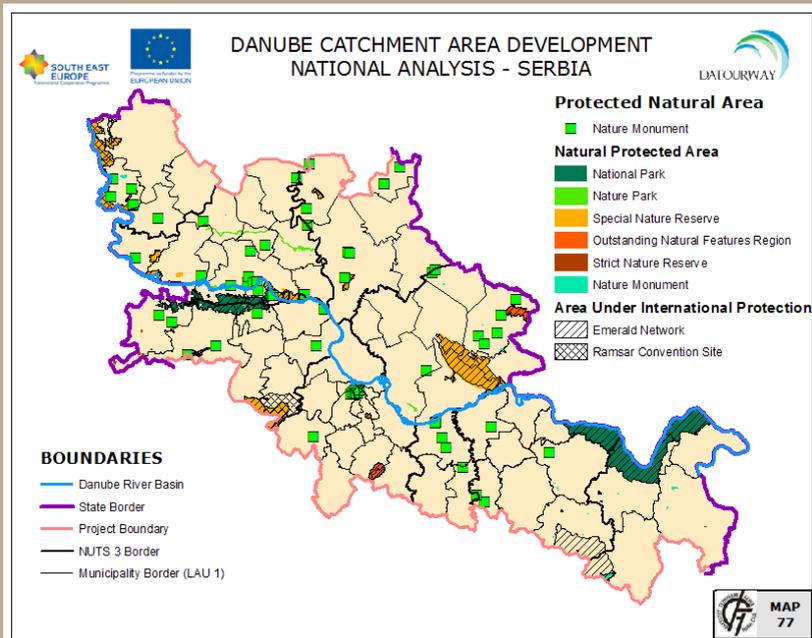
“Gornje Podunavlje” is part of European corridor VII, located in northwestern part of Serbia (in the Autonomous Province of Vojvodina) and covers the western part of Bačka spreading along the left bank of the Danube River.

The main natural attractions of this region are the Special Nature Reserve “Gornje Podunavlje” with its biodiversity and the Danube River as a main traffic route across Europe, with its own system of channels. The additional attractions are as follows: Sombor with its old part, farms as indigenous representatives of the rural way life, and various religious and cultural objects. The other activities are hunting, fishing, cycling, etc.

Master plan of tourism destination Donje Podunavlje



Tourist area “Donje Podunavlje” is spread in eastern Serbia, along the left bank of the Danube, on its course between the forts and the mouth of the Veliki Timok.



NATURAL RESOURCES

A special attraction of the area is the presence of a large number of protected natural resources and areas, such as Fruška Gora, Sremski Karlovci, Novi Sad and Belgrade metropolitan area. It should also be noted that the Serbian part of Danube catchment area consists of a great variety of content from the domain of industry, agriculture, energy, and a large number of settlements and infrastructure corridors, which are often in collision or direct conflict with the area's tourism potential.

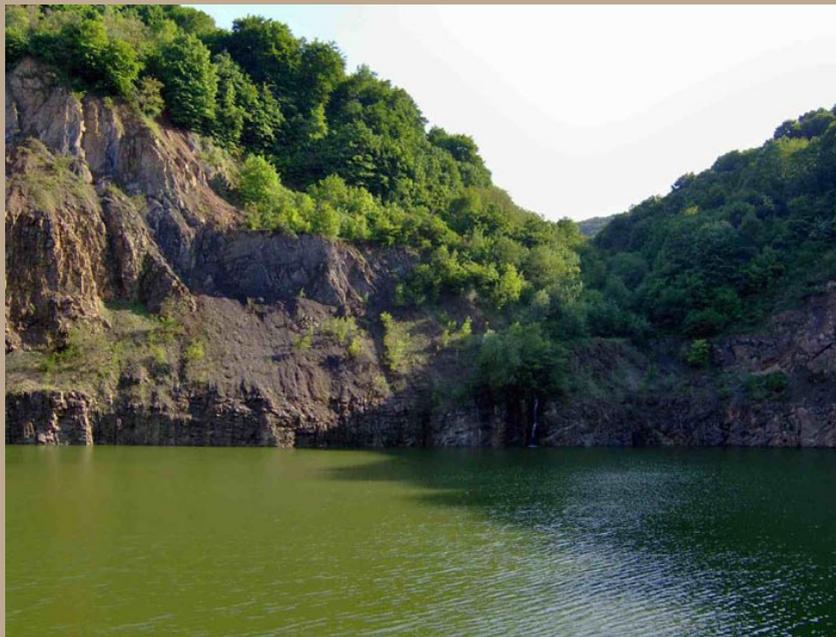
Areas Protected by National Law

Law on the protection of nature defines seven types of protected areas, namely:

1. national parks
2. natural parks
3. landscapes of extraordinary importance
4. rigorous natural reserves
5. special natural reserves
6. natural monuments
7. protected habitats

National park “Fruška gora” and “Đerdap”, in the Serbian part of Danube catchment area, as important element of natural heritage are significant tourism potentials. Some special nature reserves, such as “Old Begej - Carska bara” and “Obedska bara” are well known to the tourist population of the surrounding cities. All of them are characterized by far greater opportunities for tourism development. In that term, tourism development is desirable for many reasons, particularly as an activity of importance for the conservation of protected areas. Tourism in preserved nature of the Serbian part of Danube catchment area doesn't still have the characteristics of ecotourism, i.e., reserves do not have characteristics of eco destination. This means that they don't have represented walkways that allow visitors to reach the most parts of these protected areas, with signposts and a host of relevant data. The accommodation facilities are not regulated by the idea of eco accommodation facilities, which are basic accommodation database in ecotourism.

The conclusion is that, despite of rich and vivid natural resources in the Serbian part of Danube catchment area, all natural goods represent outstanding tourism resources, but only one part of them is included in tourism offer.



Springs

The Serbian part of Danube catchment area has natural resources for the development of spa and wellness tourism. Danube area in Serbia could be characterized by developed spa tourism. There are 7 spas in this area. It is very important to distinguish their offer to medical patients from the offer which is to be given to tourists, as well as to separate facilities for those two sectors.

In the coastal area of the Danube, mineral water could be used in spas for treatment, but currently is only untapped potential. Exploitation of those mineral water is only been announced. Spa and wellness tourism is a product with huge potential for development which can meet the growing demand for specialized medical treatments. Only in the City of Belgrade, there are 16 spa and wellness centers.



Spa and wellness in The Serbian part of Danube catchment area

Grad Beograd county, Selters Spa: Hyper-thermal alkaline-muriatic carbon-acidic mineral water “Selters”, with a temperature of 50°C

Zapadnobački county, Junaković Spa: The spa has springs of thermo-mineral water with a temperature up to 60°C. The water contains sodium, lithium, calcium and magnesium.

Zapadnobački county, Bezdán Spa: With its mineral water belongs to the category of alkaline water rich in sodium hydro carbonate iodine with a temperature of 26 and 37°C. It is suitable for the treatment of various rheumatic and orthopedic diseases. Spa has two indoor pools, three Chinese theaters, department of electrical, paraffin, work, underwater, water, laser therapy and hand massage.

Sremski county, Vrdnička Spa: Thermal water with a temperature constant of 32.5 degrees Celsius, which classifies it into hypothermal waters, with a wide spectre of influences on the human organism.

Sremski county, Slankamen Spa: The spa has mineral waters with a temperature of 18.4°C. It belongs to the group of salty-iodine waters of sodium type. The water contains sodium-chloride, iodine, magnesium, calcium, strontium and barium.

Srednje banatska county, Rusanda Spa: There is a curative effect of mineral peloid (mud) from Rusanda lake. Thermal water from a well, with a temperature of 32°C and belongs to the category of sodium hydro-carbonate sulphur chemo-thermals.

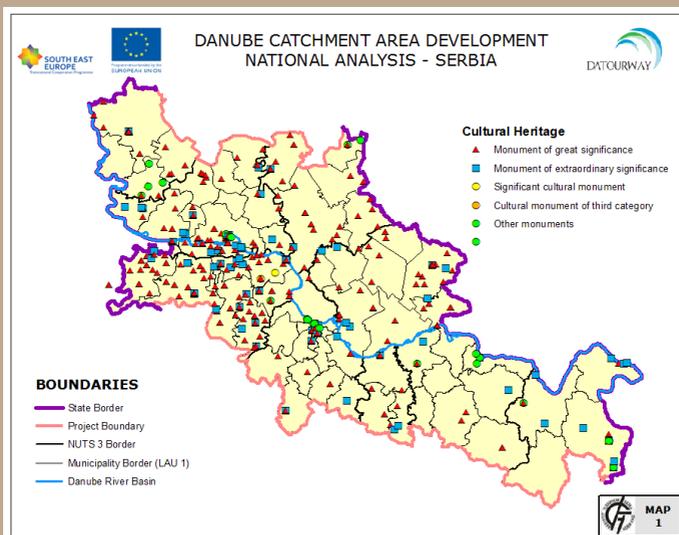
Podunavski county, Palanački Kiseljak Spa: Four sources of mineral waters with temperature 56°C. Waters belong to the category of sodium hydro-carbonate, carbon-acidic hypo-thermals.

Culture and Cultural Infrastructure

A special part of the cultural infrastructure is the part that constitutes anthropogenic tourism resources such as museums, theatres, cultural centres, exhibition galleries, monuments of monumental art, cultural and historical monuments, etc. Some of the components (sites) of cultural infrastructure such as cultural and historical heritage sites, museums and galleries are tourism resources for the development of cultural tourism while others (events, castles, environmental entities and authentic houses) are auxiliary resources. Cultural institutions, museums, galleries and theaters are typical for larger cities (the most of them are settled in Belgrade, Novi Sad, Sombor, Zrenjanin, Smederevo, Požarevac), while in smaller places organizing cultural activities is in charge of cultural centers. In 2008 in the Serbian part of Danube catchment area had 38 theatres, 57 museums, 24 galleries and 30 cinemas.

Tourism resources of anthropogenic nature

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 resource has placed the course of history in this area numerous villages, fortresses and settlements. The first archaeological finds 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. Culture of Lepenski Vir and Vinča is known as the major points in the development of civilizations and cultures of prehistoric people, while Rudna glava, prehistoric mine, is the site unique in the world. 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, and as the legacy of ancient times along it are well preserved ruins of ancient cities of Sirmium (near Sremska Mitrovica)



and Viminacium (near Požarevac). Along the Danube there are Pontes (at Kladovo) - the remains of Trajan's bridge, and the Roman fort Lederata, near Veliko Gradište. In urban areas such as Belgrade and Zemun are Kalemegdan Fortress- Ancient Singidunum and Gardoški breg-Taurunum. Both sites are very attractive and interesting tourist destinations, which in addition to architectural and cultural values containing the gastronomic and cultural events.

On the territory of the Serbian part of Danube catchment area in Serbia is located 40 cultural properties ranked as goods of great importance. Among them shines complex of Orthodox monasteries and temples on Fruška Gora Mountain, known as the Serbian Holy Mountain. In addition to religious architecture, in this area, there are authentic houses in Neštin, Bački Petrovac and Ogar protected by law illustrating the old ways of construction of residential houses in Pannonia

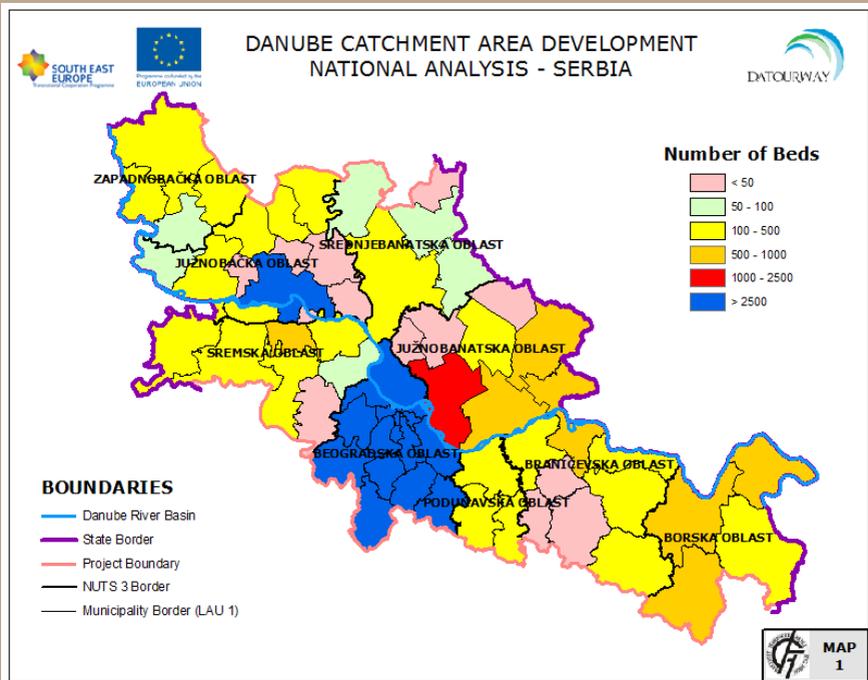


Main tourism infrastructure

The existing tourism infrastructure in the Serbian part of Danube catchment area is concentrated mainly in several areas with established tourist destinations. The capital Belgrade which is attracting the most tourists attention has the highest concentration of accommodation establishment, rooms and beds. 53,47% of total number of beds in Project area is settled in the City of Belgrade. Other municipalities and their central cities which attract tourist attention such as Novi Sad, Zrenjanin, Vršac, Bela Crkva, Kladovo, etc. have high concentration of tourist accommodation facilities and high number of bed places in them. 69,49% of Južno bački county accommodation facilities is settled in the City of Novi Sad, which shows that Novi Sad is important tourism destination in county, and also in Vojvodina region.

It should be noted that Junakovic Spa near Apatin, where construction of a large water park is planned, will extend the offer and increase accommodation capacity.

Number of beds in the Serbian part of Danube catchment area



Strengths

- A good resource potential for tourism development, with its variety of rivers Danube and its tributaries
- Favorable geographic position-river Danube Serbia joins the EU Member States: Hungary, Austria, Bulgaria, Romania
- Full flow of the Danube through Serbia is rich in very beautiful panoramic views, places of rich cultural and historical heritage and gastronomy, which represents good potential for development of river tourism
- Large urban agglomerations Belgrade and Novi Sad, with its unique location on the Danube are a very suitable place for development and international commercialization of tourism products
- Multiculturalism in counties in Vojvodina is significant potential for development of additional tourist attractions
- Positive image of Serbia as a Danube country conveys a positive attitude of local people to turn in tourist flows
- Image of relatively cheap, peaceful and safe tourist destination
- Well-developed educational infrastructure (in the Danube municipalities- especially in Belgrade and Novi Sad), profiled in the preparation of personnel for tourism
- An increasing number of projects for the development of tourism products in Danube area in Serbia- outlined a trend of increasing number of projects related to development of different forms of tourism in the municipalities of the Serbian Danube area
- Relatively well- developed regional cooperation
- Good conditions for agricultural production and food industry

Weaknesses

- Insufficient development of existing infrastructure and superstructure for the development of nautical tourism
- Lack of accommodation and catering facilities with adequate level of servicing Unused tourism potentialsLack of adequate strategies for the development of Danube Municipalities
- The complicated and expensive procedure of obtaining permits for the construction of marinas on the Danube
- Slow entrepreneurial restructuring and under- representation of SMEs in tourism
- Decline of the importance of agricultural production and the inclusion of agriculture in tourism resources
- Lack of knowledge and insufficient level of awareness and promotion of nautical tourism products Unfinished strategies for sustainable development and the lack of a comprehensive approach to environmental protection
- Lack of extra services: school fishing, river boating courses

Opportunities

- Attracting foreign investment in infrastructure and tourism
- Simplification of procedures for obtaining permits for the construction of marinas
- Improving collaboration between private, public and NGO sectors particularly in tourism and environmental protection
- A policy for wider use of the capabilities of the Danube river as an integrating factor for cross-border and transnational tourism development, linking the tourist markets of Danubian countries and development of common tourist products
- Encouraging the development of economic sectors directly linked to the development of different forms of tourism (wine and grape processing, food industry, handicrafts, commerce, etc.).
- Using the opportunities of EU funds and individual donor programs for the implementation of projects in tourism
- Using the opportunities of EU Strategy for Danube region.

Threats

- Slow economic development, unstable political situation and poverty that domestic demand is too long kept at a low level affects tourism
- Disposal and under-use of EU funds
- Lagging behind the neighboring regions (in Hungary, Romania and Bulgaria)- export of labor, slow construction of traffic and tourist infrastructure
- Lack of motivation of local authorities to use the resources available for development of tourism sector
- Continuing underestimating the potential of public-private partnership for the realization of the major projects in tourism in the smaller municipalities near Danube