



**Transnational Strategy for the Sustainable Territorial Development of the Danube Area with a Focus on Tourism DATOURWAY**

## **Pilot project 2 (HU-CRO-SRB)**

“Béda-Karapanca” pilot project

**The development of sustainable tourism in the Béda-Karapanca area**

- Tourism development survey, strategy and action plan -

Short version

October, 2011  
Budapest – Pécs, Hungary

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# 1. INTRODUCTION

## **1.1. The background and the aims of the work**

This document is part of the Transnational Strategy for the Sustainable Territorial Development of the Danube Area with a Focus on Tourism (DATOURWAY), within the Programme SEE. The development of sustainable tourism in the Kopački rit and surrounding area is part of the PiP 2: "Béda-Karapanca" (HU-SER-CRO) - Economic opportunity (via tourism) in ecological milieu. Besides Regional Development Agency of Slavonia and Baranja and Euroregional co-operation Danube-Drava-Sava from Croatia, partners in this project from Hungarian side are Scientific Association for Spatial Development and from Serbian side Regional Agency for Development Small and Medium Enterprises "Alma Mons", Institute for Town Planning in Vojvodina, Tourist Organisation of Vojvodina and Provincial Secretariat for Regional and International Co-operation – Executive Council of Autonomous Province of Vojvodina.

The target area is relatively deprived in terms of the social and economic aspects, but it has great potentials for tourist development. The existence of large areas in natural condition has enabled the protection of the natural habitat and there is potential for the development of sustainable ecological tourism. Therefore the general objective of the pilot project is to promote the sustainable tourism development of the target area and to implement a tourism strategy and action plan

Specific objectives of the pilot project include survey and evaluation of the social and economic conditions of the sustainable tourism development, the enhancement of tourist attractions, mid-term strategic planning and elaboration of action plans. Target groups of the plan are local governments, state organizations, economic organizations, private entrepreneurs and local NGOs as direct beneficiaries on the territory, but also local population and potential tourists as indirect beneficiaries. The main specific activities of the pilot project include survey, analysis, evaluation of the criteria and conditions of sustainable tourism development, organization of regional events, elaboration of the strategy/action plans and organization of a regional conference.

Specific results of the pilot project should include analysis of the criteria and conditions of sustainable tourism development until 2015, demonstration of the opportunities for sustainable tourist development until 2015, sustainable tourism development action plans, detailed tourist database, insert of the pilot project results in the joint Datourway tourism strategy and development of common project ideas. The document has been developed according to the Common methodology as two other cross border study areas in Hungary and Serbia.

## **2. SITUATION ANALYSIS**

### **2.1. The preconditions of the utilisation of tourism resources**

#### **2.1.1. The general features of the development environment of tourism**

##### *2.1.1.1. The identification of the environmental, social, economic, judicial and political situation of the area*

### **CROATIA**

The study area around Kopački rit nature park covers one town area and four municipalities in Osijek-Baranya county in Eastern Croatia. It is consisted of three different types of environment: The town of Osijek with its close surroundings as populated urban area and the remaining area covered by the four municipalities of Draž, Kneževi Vinogradi, Bilje and Erdut, which is partly agricultural and rural and partly in natural condition. Natural areas are mainly located near two big rivers Danube and Drava, with the largest area covered by Kopački rit nature park.

The most important markers of the area are two big rivers Danube and Drava. The Danube river is flowing from the north to the south and is bounding the area at its eastern side, mainly as a border river between Croatia and Serbia. Drava river is flowing from the west to the east in the southern part of the area until its mouth to the Danube in Kopački rit nature park. Apart from the remaining parts of Croatia to the west where it is a border river between Croatia and Hungary, in this part Drava river is on both sides in Croatia dividing two historical provinces Baranya in the north and Slavonia in the south.

Three northern municipalities of Draž, Kneževi Vinogradi and Bilje are part of Baranya, historical province divided between Croatia and Hungary. The municipality of Erdut and the town of Osijek are parts of Slavonia, historical region covering eastern part of Croatia. Small part of the administrative unit the town of Osijek including one tiny part of Kopački rit nature park are located on the left side of Drava river in Baranya. Due to larger coverage of natural areas, exposure to flooding by the Danube river and partly historical reasons, the northern areas in Baranya are much sparsely populated than the areas in Slavonia, including the rural part in the municipality of Erdut.

The study area around Kopački rit is located at the eastern side of Osijek-Baranya county, but is representing its most important part from the economic and touristic point of view. The main reason is inclusion of Osijek as the capital of the county and the largest and most important urban centre of the whole Eastern Croatia as NUTS 2 region. Osijek is also the only urban settlement in the study area and all other municipalities are strongly oriented to Osijek as urban centre. Nevertheless, three municipalities in Baranya are partly also oriented to Beli Manastir as traditional centre of Croatian Baranya and NUTS 4 urban centre. This orientation is stronger in the municipalities of Draž and Kneževi Vinogradi and weaker in municipality of Bilje, which is closer to Osijek than to Beli Manastir.

Border position has a consequence in the multinational characteristics of the area. Besides Croatians, there is important share of Hungarians in all three Baranya municipalities (Kneževi Vinogradi 41%, Bilje 35% and Draž 25%) and Serbs in Erdut (54%) and Kneževi Vinogradi municipality (18%). Consequently, there are many Croatian in the neighbouring areas in Hungarian Baranya and on the left side of Danube River in Serbia.

### **HUNGARY**

The analysis of the Hungarian areas for the tourism strategy of the Béda-Karapanca pilot project focuses on 3 micro regions: the Mohács, the Siklós and the Baja Micro Regions. These analysed micro regions belong to two NUTS II planning statistical regions of Hungary, the Mohácsi and Siklósi to South Transdanubia, and the Bajai to the Southern Great Plains Region.

The exact area of the *Bajai Micro Region* is 1190 km<sup>2</sup> with a population of 74925 persons. The micro region is not an advanced region of Hungary which means that the social, economic background provides this region not to be a lagging area. The number of its settlements is altogether 20 out of which there is only one town, Baja and 19 more villages or parishes. The number of settlements which are lagging behind due to social and economic reasons is 11, which also suffer a higher than the national average unemployment ratio as well.

The GDP per capita is unfortunately lower than the national average and also lower than the regional and county average as well. Recently its value is a bit more than 500 000 HUF/capita/year.

The area of the *Mohácsi Micro Region* is 846 km<sup>2</sup> with a population of 50465 persons. The micro region is a lagging micro region of Hungary which means that the social, economic background of the area needs serious development processes. The number of its settlements is altogether 43 out of which there two towns (Mohács and Bóly) 41 more villages or parishes. The number of settlements which are lagging behind due to social and economic reasons is 23, which also suffer a higher than the national average unemployment ratio as well.

The GDP per capita is unfortunately lower than the national average and also lower than the regional and county average as well. Recently its value – just like in Baja – is a bit more than 500 000 HUF/capita/year.

The area of the *Siklói Micro Region* is the smallest among the researched NUTS III territories, 653 km<sup>2</sup> with a population of 37247 persons, which is also the fewest. The micro region itself is also a so called lagging micro region of Hungary where the social, economic background of the area needs serious development processes as well. The number of its settlements is altogether 53 out of which there are three towns (Siklós, Villány and Harkány) and 50 more villages or parishes. The number of settlements which are lagging behind due to social and economic reasons is quite high, 37, which areas also suffer a higher than the national average unemployment ratio.

The GDP per capita value show also a lower than the national average situation, where the regional and county average exceeds the micro region's performance as well. Recently its value is the smallest among the researched NUTS III areas, nearly 500 000 HUF/capita/year.

All the micro regions have a favourable geographical allocation in terms of bilateral conditions since they have a bordering allocation. The cross border relations are getting more and more important both with the Croatian and the Serbian side, but have not reached the significant value which would be needed. In terms of the future joining to the EU of Croatia and maybe later Serbia, these relations are crucial in the every day and economic-political life of not just the researched micro regions but the three mentioned countries as well.

The area is a “gateway to the Balkans” which would emphasize the role of Hungary in terms of the European Union's Balkan strategy as well.

All the reviewed micro regions are traditionally rural areas where the development of sustainable agriculture, nature protection, tourism and cultural values would mean one of the basic conditions for economic and social development.

For all the 3 micro regions the external relations are crucial since these are bordering areas where cross border cooperation is essential for further development. This situation will be promoted by the future joining of Croatia – and maybe later Serbia – to the European Union and also the improving relations – both economic, political and cultural – with the Serbian and Croatian side.

Due to the above mentioned, these areas should be open to the cross-border cooperations which could mean the basics for the interaction between the EU and South-East Europe by a more efficient information flow, the strengthening of the transit role, and the business relations as well taking into consideration the principles of sustainable development.

## **SERBIA:**

Gornje Podunavlje Special Nature Reserve is situated in North-west part of Serbia, in Province of Vojvodina, along the left bank of the Danube. It comprises numerous meanders, dead river branches, canals, ponds, swamps and marshes formed as a result of continuous river dynamics, which is preserved in large part of reserve. It is bordered with two other protected areas: with Kopacki Rit in Croatia and Danube-Drava National park in Hungary with which it forms large Central Danube Floodplain Area, almost 70000 ha large. Despite somewhat peripheral position in Serbia, Gornje Podunavlje is situated very near to two state borders and is easily accessible for visitors. In close surroundings of the reserve, main urban centers are Sombor and Apatin in Serbia, Osijek in Croatia and Baja in Hungary.

### **Importance**

With its almost 20000 ha in size, Gornje Podunavlje is the largest floodplain area in Serbia. It was partly protected since 1955, Special Nature Reserve (the most strict conservation scheme after National park, according to Serbian Law) was designated by Government of Republic of Serbia in 2001. It is also a Ramsar Site since 2007, IBA (Important Bird Area) since 1989 and part of proposed large transboundary Biosphere Reserve Danube-Drava-Mura. In this area IPA (Important Plant Area) was also designated, as well as PBA (Prime Butterfly Area). The huge importance for conservation of biodiversity is very obvious. The management authority of reserve is Vojvodinasume Public Enterprise, but conservation is regularly assisted and monitored also by Institute of Nature Conservation of Serbia and Provincial Secretariat for Environmental Protection and Sustainable Development of Province of Vojvodina. It can be stated that Gornje Podunavlje is a representative floodplain wetland, a prototype of other wetlands in Serbia, and therefore we decided to present Serbia to our visitors thru it and its attractions. All protected areas along the Danube seek our constant concern and current status of Gornje Podunavlje demonstrates well how this concern should be carried out.

### **Cultural and historical features**

On the edge of reserve there are several villages and two towns. Villages keep very picturesque and preserved traditional life-style and architectonic, sacral and cultural heritage with mixture of different ethnic groups living in them. On the place where central village Backi Monostor is situated, it is considered that medieval city of Bodrog was placed, but it was destroyed probably by floods and today there are no traces of it.

### **Nature protection**

Having in mind that this is managed area, the concept of its conservation is based on protection of current values (landscape, biodiversity and driving processes) as well as implementation of directed habitat revitalization projects.

The most typical for this area is ecotourism, with small-scale facilities in the villages, and based on surrounding nature.

#### *2.1.1.2. The identification of the tourism of the area in a macro regional context*

### **CROATIA**

Although the macroregion of Eastern Croatia is the weakest in Croatia regarding the tourism development, its most important part is the area around Osijek, i.e. the study area. The main reason is location of the majority of most important tourist attractions of all Eastern Croatia in the town Osijek and its neighbouring areas. The town of Osijek is considering the number of tourist overnights and overall tourist importance also the third tourist resort in the whole continental Croatia after capital Zagreb and Plitvice lakes national park, located on the connection between Zagreb and coastal Croatia in the western part of the country.

The main reasons for visiting Osijek are the town itself due to its economical importance and its two most important attractions – the old town Tvrđa in Osijek and Kopački rit nature park, located practically on the border of town area. Tvrđa is well preserved historical Town Planning Ensemble (Fort) from 18<sup>th</sup> century and together with Đakovo cathedral is the most important cultural monument in whole Slavonia. Kopački rit nature park on the mouth of the rivers Drava and Danube is the most important and after Papuk mountain nature park the largest protected area in Eastern Croatia, known as one of the largest natural swamps in Europe, famous for numerous plant and animal species.

Actual trends show the growth of the tourist importance in the area foreign and domestic, visible through 30 per cent growth of tourism overnights between 2005 and 2009, in spite of overall crisis. It is caused by the economical recovery of the area, building of new accommodation capacities, strong promotion, lot of various manifestations etc. and favourable conditions for tourism development include also general growth of interest for the preserved natural and cultural heritage, growth of importance of rural tourism and location of many other important tourist attractions of Eastern Croatia in the study area or in its close environs.

Considering predominantly domestic demand and importance of business tourism there are no serious competitors which can endanger actual strong growth. Eventually as competitors can be seen the neighbouring areas in Hungary and Serbia, but considering the overall growth they are functioning more as encouraging factor. Another favourable condition is also the general easement of border formalities (especially border crossing regime between Serbia and European Union) and better security level in the area caused by constant growth of traffic between the three countries.

## **HUNGARY**

As we mentioned earlier, the reviewed area of the pilot project belongs to three micro regions in Hungary. The country itself is a member of the EU since 2004 which is very important since as the European Union is still the biggest tourism market in the world – with around 55-57% of all the international tourism flow – the tourism and the tourism development is a crucial role not just in the Hungarian side, but in the future joining areas as well.

Recent trends of tourism – both international and national – also prove that alternative branches of this economy are dynamically developing since people taking part in tourism – instead of the traditional mass tourism forms – are more and more interested in cultural and natural values and different forms of tourism such as ecotourism.

The reviewed area is a perfect example for possible international cooperation in tourism as well and also provides a good background and basics for sustainable ecotourism development since the natural and cultural values of the area are well provided.

The competitors in tourism are on the one hand those European countries which have well based ecotourism in practice and in the more narrow aspect the neighbouring countries – such as Slovenia, Croatia, Serbia and Romania – can also be competitors for the Hungarian side of the Béda-Karapanca region.

One of the main problems of the present situation is that the areas possess a good natural and cultural background for tourism, but they usually lack the needed tourism suprastructure and infrastructure as well.

## **SERBIA**

National Ministry of Trade, Tourism and Services prepared Tourism Development Strategy for the period 2006 – 2015, which represents a key document for defining the course of tourism development in Serbia. The Strategy pointed out that Serbia has considerable potentials for new development, products that can and need to be recovered and commercialised rapidly, both with their own resources and with expected support of the international community.

According to the Strategy, Serbian tourism will be structured in four tourist clusters based on different forms of economic experience and concentration of various types of resources in

different parts of the country, and following modern trends and principles of regional development of tourism as well.

The Autonomous province of Vojvodina has been identified as one characteristic cluster in the framework of tourism development. Different social and landscape features, cultural heritage, strong geographic determination and historical links to the neighbouring countries (Hungary, Croatia and Romania) provided such identification.

In the implementation of the concept of accelerated development of Vojvodina, tourism has been identified as one of key resources for development.

Gornje Podunavlje has been included on the list of six key Touristic destinations in Vojvodina. Touristic destination is spatially determined units with integrated tourist offer. Gornje Podunavlje in this sense frames much larger area than the Nature park and it, more or less, coincides with Serbian Pilot project area.

This selection has been done by comprehensive criteria that include existing tourist offer, development trends, geographic position and traffic infrastructure and accessibility as well as natural and man-made environment and resources.

In addition to traditional tourist destinations, development of tourism in Vojvodina has been based on the development of specific and more modern forms of tourism.

Besides the classic spa services, it has been invested in the construction of sports and wellness centres, so as to use the thermal waters not just for healing and rehabilitation, but for recreation and fun as well. Project for development of nautical tourism is in the process of realisation. Farm tourism has been developing lately as a new trade mark of the rural tourism.

Another category that determines tourism of the area in the regional context of Vojvodina is Transit tourism. That comprise naval and road tourist routes. Naval rout of the Danuberiveris the most important for nautical tourism on the macro regional scale. Fifty-six micro locations in sixteen Danube municipalities have been determined as locations for construction of marines. It is recommended to perform categorisation of the existing marines, which implies categorisation of technical quality of tie up, vessel storage and docking, services, restaurant, petrol station and other things EU marines are equipped with.

The city of Sombor is included on the list of Urban centres as important regional tourist hub.

In such a context, GornjePodunavlje appears as a cluster that has all those elements that are key features for tourism developmet in Vojvodina.

#### *2.1.1.3. The planning-developmental environment of tourism*

### **CROATIA**

The tourism development in the area is covered with many planning documents from national to local level. For the area the most important are spatial plan and Tourism master plan for Osijek-Baranya county. There are also spatial plans on the NUTS 5 level and especially important are the one for the town of Osijek and the one for the Kopački rit nature park. In those plans Kopački rit nature park is regularly mentioned as the main natural attraction of the whole Eastern Croatia and Osijek as the most important cultural tourism destination and possible location of UNESCO Heritage site.

The town of Osijek and the four municipalities are also covered with planning documents defining land usage and activities in the areas they cover. Those plans are opened to general public and in most cases can be viewed on the local Web sites. Very important element encouraging factor for the future tourist development is also the establishment of Mura-Drava regional park as the part of future Mura – Drava – Danube cross border UNESCO World Biosphere reserve.

### **HUNGARY**



The spatial, branch and development objectives of the areas usually focus on regional development problems, social and economic problems and areas and also tourism. The areas are usually connected to 5 levels of spatial planning:

- Settlement: (settlement plans are present only in the greater towns and cities of the micro regions such as Baja, Siklós, Villány, Mohács etc.). In terms of sustainable development among these programs we highlight the so called Eco-Baja programme for 2005-2020 where the program took into consideration sustainability in a great extent. These programs of course take into consideration the local conditions of social and economic life.
- Micro region: The micro regions are basically having all the required planning documents but some of them by now are out of date. They were usually created in the beginning of the 2000s or around 2005.
- County level: The counties are basically having all the required planning documents.
- Regional level: They were created for both the South Transdanubian and Southern Great Plain Regions on the following subjects and areas: situation analysis, concepts, strategies, operative programs and action plans on all the areas of social and economic life. This planning process is adjusted to the needs and requirements of the European Union.
- and National level: (New Hungary Development Program and its Operative Programs, New Széchenyi Plan, National Development Policy Concept „Országos Fejlesztéspolitikai Koncepció”, National Spatial Development Concept “Országos Területfejlesztési Koncepció”).

The presented programs and plans are well adjusted to the county and regional level of planning processes and also they are put into national and – due to the bordering situation – international context as well.

## **SERBIA**

The most important spatial planning documents in the frame of Pilot project area are listed. Some of them are already adopted and some are still in the working stage.

On the national level there is Spatial plan of the Republic of Serbia adopted in 2010. It is Spatial development plan with short and mid term goals (2010-2014-2020). On the regional level there is Regional spatial plan of the Autonomous Province of Vojvodina which conceptual phase has passed the local assembly and now the draft version is on the way. It has the same time-frame as the Spatial plan of Serbia. Another regional spatial plan is Special purpose area spatial plan for Natural reserve Gornje Podunavlje. It has focus on the nature protection zones in the area of Gornje Podunavlje and brings new concepts for development of the area. Spatial plan for special purpose area for the Danube River is the most recent spatial plan that is confronting spatial conflicts on the river. It embraces the whole Danube flow in Serbia. On the local level there are Municipal spatial plans. They are considering spatial development of NUTS 4 unit.

### *2.1.1.4. Tools and institutional system of tourism developments*

## **CROATIA**

Croatia as a country has well structured organization of tourism from national to local scale. The roof organization is National tourism organization responsible for international promotion. Apart of overall promotion, the National tourism organization is promoting Croatia through ten regions – seven in the coastal part of the country and three in the continental part. The study area is a part of the tourist region of Slavonia, covering five counties in Eastern Croatia which include almost all of historic region of Slavonia - Slavonski Brod-Posavina, Požega-Slavonia, Virovitica-Podravina, Osijek-Baranya and Vukovar-Srijem county. There is no organization on regional level, so the study area is included in a county organization of Osijek-Baranya county.

On the local level in Croatia there are town and municipality tourist organization, with remark that they are usually formed in all towns, but not in all municipalities, depending on their tourist importance. In Osijek-Baranya county there are local tourism organizations in all seven towns (Beli Manastir, Belišće, Donji Miholjac, Đakovo, Našice, Osijek and Valpovo) and municipal tourist organizations only in four touristically more important municipalities – spa centre Bizovac, Erdut on the Danube (the centre is in pilgrim centre Aljmaš), Bilje as municipality where there is majority of Kopački rit nature park and the municipality of Draž. In the town of Beli Manastir as the centre of historical region Baranya there is also a specific tourist organization of the whole microregion Baranya with tourist information centre in Zmajevac in the Kneževi Vinogradi municipality. In such way local tourism organizations exist in all five administrative units of the study area. Osijek town tourism organization has besides central town locations also two allocated tourist information centres in town areas Tvrđa and Gornji Grad.

All tourism organizations are financed by the tourist tax, so they have their own funds, with remark that they are usually not sufficient for the larger projects except in the areas with very high number of tourist overnights. Nevertheless, in many cases local tourist organizations function as local destination management companies and they usually co-operate with local administration, tourist enterprises and Ngo's (especially those involved in the protection of nature), regarding financing of various development projects.

## **HUNGARY**

After the elections in 2010 tourism as a branch of industry and an important part of Hungarian economy has been labelled to the Ministry for National Economy. So far we do not know too much on the tourism policy of the new government, but the new Széchenyi Plan mentions and highlights the development of tourism and within that health tourism as a priority.

The basic document for the recent tourism planning processes is still the National Tourism Development Strategy (2005-2013), which has a major priority to improve life quality as the effects of the proposed tourism developments.

In the two NUTS II regions, the 2<sup>nd</sup> National Development Plan and the South Transdanubian and Southern Great Plain Operative Programmes' documents handle tourism as a priority for the 2007-2015 period so it appears in the situation analysis, the SWOT analysis, the future situation and among the strategic aims as well.

Since the national institutions are under organisation we can mention that there are still existing regional institutions such as the Regional Marketing Directorates and the Regional Tourism Committees which were created to serve the development of tourism on the NUTS II level.

Tourism is also institutionalised on the county level as well, usually under the direction of the county local governments.

In terms of the institutional system we have to highlight a quite modern initiative the system of the so called TDM (Tourism Destination Management) organisations. The creation and continuous formation of this network hopefully will enable the tourism industry to create a well functioning marketing institution system in order to promote and develop tourism on different regional levels. It is also important to highlight that the TDM destinations are bottom-up organisations and initiatives.

On the local level we can find tourism development initiatives and networks as well which are usually thematically or locally connected together, such as wine routes, wine regions, or rural tourism cooperations among villages and other settlements.

The cities and those settlements which are important in any forms of tourism usually have a committee in the local governments concerning tourism as well.

The financial background for tourism development is partly supported by the EU programmes and initiatives and partly the national programmes.

For both EU and national programmes or project proposals the problem of the own share is always present since the analysed areas are usually economically lagging behind so often the local governments are unable to present the needed own share. That creates an unfortunate situation as

some of the projects were not utilised by the local communities because of the lack of financial background.

## **SERBIA**

The basic document for tourism development is the Development Strategy of tourism of the Republic of Serbia (2006.) The main goal is to create the basis for sustainable development of tourism and optimal use of local, regional and national resources and interests enforced by international cooperation.

In target area there are several tourist organizations: Tourist Organization of Vojvodina – regional level, and two local organizations: Tourist organization of the City of Sombor and Tourism organization of Apatin.

As it was mentioned before, the Municipality of Sombor and Apatin belong to tourist cluster of Vojvodina and they are classified as a tourist destination "Gornje Podunavlje". Both municipalities have completed spatial development plans, master plans are in the final stage, performed by Tourism Development Strategy until 2015.

Tourist organization Apatin exists over 45 years and works closely with the Tourist Organization of Vojvodina and Serbia, such as Tourist organization of the City of Sombor.

There are civic organizations and NGO's, which have active role in creating and developing the tourism offer. In the City of Sombor there are: "Klaster umetničkih zanata" and "Salaši Sombor" and NGO's: "Staparke", "Zlatne ruke-Somborke", "Duga", Udruženje građana "Bunjevačko kolo" and "Brežanke". For tourism marketing and promotion are in charge Tourism organization of Apatin and Tourism organization of the City of Sombor. Tourist organisation of Apatin is actively promoting local tourist offer through participation on tourist fairs, by publishing different tourist brochures and maps, and advertising on regional, national and international media.

Tourism organization of the City of Sombor is also involved in publishing of brochures and other promotional material, which has been distributed on national and international tourism fairs.

### **2.1.2. Social background**

#### *2.1.2.1. Population*

## **CROATIA**

The study area of one town and four municipalities has an area of 992 square kilometres and total 157.915 inhabitants in 2001. According to the last census data from 1991 and 2001 the whole area is showing strong decrease in the total number of inhabitants, especially in the two northernmost municipalities Draž and Kneževi Vinogradi, as shown in table 1 below. The growth of the population is recorded only the suburban settlements near Osijek Brijest, Brijesće, Josipovac and Klisa, and the biggest decrease is recorded in the settlement Nemetin near Osijek heavily destroyed in the war and in the small settlements in the vicinity of the Kopački rit nature park – Zlatna Greda, Tikveš, Jasenovac and Mirkovac. Nevertheless, due to changes in the methodology of the Croatian Census between the years 1991 and 2001, the real decrease is smaller.

There are no data about the changes in population by towns and municipalities after 2001, but the whole county is still showing decrease in the number of the population. According to the estimates from 2009 by the Croatian Bureau of Statistics the population of the Osijek-Baranya county would be 318.239 inhabitants, what is -0,27 per cent per year considering the total number of inhabitants of 330.506 in 2001. Nevertheless, this decrease is much smaller than in the period between 1991 and 2001 when it was about -4 per cent de facto or -9 per cent according to the census results. It has to be mentioned that both the natural and migration trends were negative for the Osijek-Baranya in all years after 2001 – in the year 2009 natural decrease was 881 people, and migration balance was -388 towards Croatia and -177 towards abroad.

The age structure of the population is relative unfavourable, because it is generally worse than in the county and Croatia as a whole. This is especially case with the younger population under 20 years, because its share was 22,4 per cent in 2001 in comparison with 25,4 per cent for the county and 23,7 per cent for the whole Croatia. The share of older population over 64 years (15,3 per cent) is also smaller than in the whole county (14,8 per cent), but it is slightly better than the Croatian average of 15,6 per cent. The situation is generally more favourable in the town of Osijek and municipality of Bilje as economically more developed and the worst in the most isolated areas in the northern part of Croatian Baranja – especially the municipality of Draž. Structure of the population according to the age groups is illustrated by the table below.

Regarding the study area it has to be mentioned that demographic trends are especially negative in Croatian Baranya, so the decrease will be probably larger. Besides war damages and slow economic recovery of the area, the additional reason for negative demographic trends is emigration of some Hungarians towards Hungary and some Serbs towards Serbia. The good aspect is general slowdown of negative demographic trends and return of many people that have emigrated after the War, both in Osijek and in rural areas.

## **HUNGARY**

The number of inhabitants in the *Bajai Micro Region* is 74925 persons. According to the latest available statistics, the change ratio of the population in the last ten years is -2,8% which is unfortunately a higher value than the county, regional and national level. It means that the net migration rate is negative and quite high. The death rate is higher than the county average, around 14,4‰ in 2008. The population is definitely ageing, which is due to the low birth rate and the higher death rate. The natural decrease is -6,2 persons/1000 persons. This is valid for all the three micro regions analysed.

The number of inhabitants in the *Mobácsi Micro Region* is 50465 persons. According to the latest statistics, the change ratio of the population in the last ten years is more than -5% which value is much higher than the county, regional and national level. It means that the net migration rate is negative and very high in the area. The natural decrease is -6,8 persons/1000 persons. The death rate is higher than the county average (15,2 persons/1000), which means that in the last decade the population is definitely ageing and decreasing here as well, which is also due to the low birth rate and the higher death rate.

The number of inhabitants in the *Siklósi Micro Region* is the smallest among the reviewed areas, altogether 37247 persons. This area is also characterised by negative migration meaning that more people are leaving the area than coming. It is also true that this value is fortunately lower than the regional average and almost the same as the county average. By 2002, the birth rate decreased to 10,4‰ and the death rate decreased to 12,9‰ by 2009. The natural decrease is the smallest, -3,4 persons/1000 persons.

## **SERBIA**

### **Demographic development analysis**

The plan area comprises 2 municipalities (Sombor and Apatin). The population of the observed area at 2002 census was 130.076. The population change in one census period (2002/1991) showed the positive tendency. While most regions in Vojvodina registered depopulation tendency, the region of West Backa had increased population. The negative population tendency occurred after 2002 census, resulting 0.4% less population in 2008 than in 2002.

It is possible to estimate population by regions just in Vojvodina. Total population estimation of five regions in 2021 comparing to 2002 census data, shows decrease of 7.4%. Depopulation trend is going to affect all five regions and the most severe affect will record West Backa region. The average population density is 92 per sq. Km.

### **Demographic processes**

Natural demographic tendencies show negative characteristics with the high mortality rate, low birth rate and negative population growth. Negative population growth affected the plan area in the 2002-2008 period. The extreme low population growth level is recorded in Zapadna Backa region with less than -8 ‰.

The plan area has the transitive demographic characteristics which were especially notable in the last decade of 20th century (refuges from former Yugoslavian republics). Mechanical component influenced the demographic tendencies and decreased negative population growth rate. According to 2002 census the migrant population in the area was almost half of total population. The highest rate of mechanical population influx occurred in the 1991-2002 period.

### **The population structure**

The population structure and its basic components are showing disappointing age structure of the population. Aging index has negative trend and it is set dramatically above the critical level. Population older than 60 is higher than the population of young from 0 to 19. Working population (women from the age of 15 to 59, man from the age of 15 to 64) in 2008 was 68.4% of total population.

#### *2.1.2.2. Employment*

### **CROATIA**

The study area belongs to the areas with high unemployment rates regarding Croatia average, but relatively better in comparison with the rest of the Eastern Croatia. The average unemployment in the period of the last five years in the Osijek-Baranya county was constantly over 20% and national average in the same period was the highest in 2005 with the level of 17,1% rates<sup>1</sup>. There are no data on the municipality level, but it can be estimated that they were close to the county average.

The general lower level of development of the study area is visible also through the situation regarding employment according to sectors. The data for the municipalities were available only for census year (2001), but the general picture remains the same. The share of employed people is in the study area (33,0 per cent) better than in the Osijek-Baranya county (31,6 per cent), but worse than in Croatia as a whole (35,0 per cent). As expected, this share is much lower in rural municipalities of Draž, Kneževi Vinogradi and Erdut and better in the town of Osijek and in more developed "Kopački rit" municipality of Bilje close to Osijek.

The data from the year 2008 were not available for the municipality level, but much lower share of employed people in agriculture in the Osijek-Baranya county (5,6%) and higher in industry and construction (34,0%), as well as in services is caused mainly by different way of collecting data. The share of people employed in tourism is relatively low (only 2,5 to 3,5 per cent of the total active population in all municipalities). That is caused by the fact that only few people are basically employed in tourism sector, because this is their additional income – that is especially a case in rural tourism with people mainly employed in agriculture.

### **HUNGARY**

The registered unemployed in the *Bajai Micro Region* in 2005 was 7,8% which value was growing by 2009 to 9%. This value exceeded quite a bit the county average. Around 53% of the unemployed are women in the area. The number of taxpayers is a bit less than 40% in 2007.

The registered unemployed in the *Mohácsi Micro Region* grew from 2003 to 2009 from 8 to almost 12% exceeding the county average. The number of taxpayers is around 41% in 2007. The ratio of the actively employed is 41,37% (20 881 persons).

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<sup>1</sup> Source: Annual Reports of Croatian Employment Bureau 2005-2009

The registered unemployed in the *Siklósi Micro Region* in 2003 was almost 11% which value grew by 2009 to 13% which is the highest among the three micro regions also by far exceeding the county, the regional and the country average. The number of taxpayers is a bit less than 40% in 2007. There are 14 316 persons who are actively employed in the micro region which is a 38,4% ratio.

## **SERBIA**

Total Employment rate of the area (2008) was 46.0%. Unemployment rate is 16% (generally for Zapadna Backa county). Total employed population in 2005-2008 period slightly decreased (0.2%), while unemployment dropped significantly (30%).

### *2.1.2.3. Education*

## **CROATIA**

The educational situation in study area is better than Croatian and Osijek-Baranya county average due to inclusion of Osijek, but it is worse than in all in rural municipalities. The share of population without education is in Osijek smaller than Croatian average (1,9% in the town of Osijek, 3,4% on the county level and 2,9% at the national level) and the share of people with college education and more is much higher in Osijek (15,1% in the town of Osijek, 9,2% on the county level and 11,9% at the national level). That is caused by larger share of rural population and overall economic situation. Slightly better educational structure in Bilje municipality and the worst situation in Draž municipality match with the overall development patterns and is partly caused by distance towards Osijek as urban centre. Education level by towns and municipalities is illustrated by table and figure below.

There are no exact data about the language knowledge, but generally the younger people, especially in Osijek are fluent in English language and language schools are available in Osijek. A lot of people also speak German, including many older ones, partly due to working abroad in the past and partly due to seasonal working in tourism on the Adriatic coast. Due to a proximity to Hungary and historical relations many people in Baranya speak Hungarian and there is important Hungarian minority, especially in the area close to Kopački rit nature park.

## **HUNGARY**

According to foreign language knowledge we can state the ratio of ethnicities and minorities is very high in the micro regions compared to the national average outstandingly in the Siklósi Micro Region where the ratio of the ones belonging to the German and Croatian ethnicities and the Gipsy minority is nearly 20%. The greatest minority of the region is the Croatian (11.1%) which is followed by the Gipsy/Roma population (6.8%) in that area. Proceeding from this fact it is a very fortunate situation for tourism industry that the local population has a relatively higher foreign language knowledge than the national average.

Apart from language knowledge we can also state that the analysed areas established a well organised primary and secondary education system. Baja is also a higher education centre. The nearest universities are in Pécs and Szeged to where a considerable amount of students are migrating who after their qualification tend to go back with a background of tourism education and profession as well.

## **SERBIA**

The education structure of the population has been analysed on the basis of 2002 census for the NUTS 3 region Zapadna Backa. The education level of the population older than 15 has been considered (85.0% of population). 45% of the population holds a high school level degree, 25% have finished education on primary school level and 14% holds university degrees. In comparison to previous periods when primary school was the dominant education level, it has been recorded

significant development of overall population education level. The education development tendency continued and the number of people with no formal education seriously dropped.

### **2.1.3. Natural and environmental factors**

#### *2.1.3.1. The natural and landscape features of the area*

#### **CROATIA**

The climate in the study area is continental with warm and dry summers and cold and humid winters. According to the data from the Croatian Meteorological and Hydrological Service in 2009 the average temperature in Osijek was 12,3° C and average precipitation 545 mm. The hottest month is July with the average temperature of 23,2° C and the coldest January with -1,2° C. The biggest precipitation is in December (101 mm) and the smallest in July (only 13 mm). The study area is therefore considered generally dry and sunny in comparison with the majority of continental Croatia, what is caused by its eastern position and absence of high mountains.

Although the area is mainly flat, there are two smaller hilly parts – one in Baranya in contact area between the municipalities of Draž and Kneževi Vinogradi and one in the south-eastern corner in the municipality of Erdut. Both areas are known for its vineyards and beautiful scenery. The northern hilly area, known as Banska kosa has maximum elevation on 244 meters (Kamenjak), and southern area, known as Daljska planina only 190 meters above sea level (Čvorkovac). Both hilly areas stretch to the Danube river forming steep slopes in sandy material, with remark that the one near Erdut is protected as important landscape, which is the second largest protected area in the study area and Osijek-Baranya county.

The soils in the area are generally of very high quality except in the areas close to big rivers Danube and Drava with large swamps. The area around Osijek has one of the highest amounts of “crnica” (black soil) and very high percentage of sandy soils. Therefore this region is known as one of the most important in Croatia regarding agriculture production.

In the study area there are total 9 areas under various forms of natural protection, the most important and the largest being Kopački rit Nature park on the mouth of the rivers Drava and Danube. Due to strict rules in Croatian national parks not allowing commercial forestry and hunting, Kopački rit does not have a status of national park, although the level of protection is higher there than in national parks in Hungary, Italy and many other European countries.

Kopački Rit Nature park is located northwest of the confluence of the Drava and the Danube, situated at the border with Serbia. The area of the nature park according to map coverage has 22.800 hectares and according to the designation Law 17.730 hectares. Kopački rit is a flooding area due to its position between two big rivers, Danube and Drava. It comprises many backwaters and ponds along the Danube.

The area of the Park supports a mosaic of lakes, marshes, wet grasslands, extensive reed beds and woodlands and includes numerous channels, oxbows, and a complex of fishponds. Because of its rare natural characteristics, Kopački Rit became the Ramsar Site N°583 in 1993. It is famous after its biological diversity with over 400 vascular plants, 293 bird, 55 mammal, 55 fish, 11 amphibian and 10 reptile species recorded. The bird species include various kinds of storks, herons, spoonbills, eagles and mammals wild boars, red deer and beech marten. The biggest concentration of various animal species is special zoological reservation inside the nature park.

Besides Kopački rit nature park and zoological reservation the most significant protected area in the study area and the whole Osijek-Baranya county is Erdut important landscape. Its attraction comes from loess sediments 70 meters above the Danube river surrounded by beautiful vineyards. The remaining six protected area include one natural monument Bilje cemetery, protecting last remnants of old Pannonian meadows and five monuments of park architecture. They include parks near Bilje and Tenja manor, Dalj patriarchal park and two parks near Osijek's Tvrđa - King's Petar Krešimir IV

and King Tomislav park. In the table below, there is a list of natural protected areas in the study area.

This area is also very rich in NATURA 2000 sites, which are covering all protected areas except parks and some additional areas mainly near Danube and Drava river. There is one NATURA 2000 polygon area important for birds, four NATURA 2000 polygon areas important for species (except birds) and habitats and eight spots important for species (except birds) and habitats spots. The only NATURA 2000 polygon area important for birds Podunavlje and Lower Podravlje covers parts of all administrative units in study area and nine more in Osijek-Baranya county, i.e. all areas important for birds nesting near Danube and Lower Drava in Croatia. There are total 21 bird species under protection in this area, listed in the table in *Appendix 1*.

Among four NATURA 2000 polygon areas important for species (except birds) and habitats the most important is Drava, which is covering the same area in the study area as the Podunavlje and Lower Podravlje polygon area important for birds, but it stretches along the whole Drava river in Croatia to the Slovenian border. This area protects alluvial forests and natural eutrophic waters with the Hydrocharition or Magnopotamion vegetation. There are total 21 various animal species under protection in this area, listed in the table in appendix.

Second NATURA 2000 polygon area important for species (except birds) and habitats is Kopački rit, which includes also some areas outside nature park and is protecting alluvial forests, amphibian habitats, Cnidion dubii meadows, Flooded mixed forests and Natural eutrophic waters with the Hydrocharition or Magnopotamion vegetation. There are total 13 various animal species except birds under protection in this area, listed in the table in appendix. The remaining two NATURA 2000 polygon areas important for species (except birds) and habitats are hilly area BANSKO BRDO in Draž and Kneževi Vinogradi municipality protecting Subpannonian steppe grasslands and tiny area Batina – Dunavac in Draž municipality protecting amphibian habitat Isoeto-Nanojuncetea by the Danube river near Batina village.

From eight spots important for species (except birds) and habitats two (Dunavac-Šarkanj in Draž municipality and Tanja 1 near Dalj in Erdut municipality) are protecting alluvial forests near Danube, one (Šarkanj in Draž municipality) flooded mixed forests and one (Danube near Batina in Draž municipality) is protecting Amphibian habitat Isoeto-Nanojuncetea and rivers with slimy shores covered with Chenopodium rubri p.p. and Bidention p.p. The remaining four spots important for species (except birds) and habitats are protecting various types of grasslands – in Zmajevac in Kneževi Vinogradi municipality and Dalj in Erdut municipality are protected Pannonian steppe grasslands on loess, in Bilje cemetery Subpannonian steppe grasslands and in one spot in Kopački rit special type Cnidion dubii meadows.

## HUNGARY

The small lands of the researched area are the following:

- Mohácsi Island
- Mohácsi Terrace Plain
- Bácskai Loess Plain
- Villányi Mountains
- Southern Baranya Hills
- Dráva Plain
- Fekete-víz Plain
- Nyárád-Harkány Plain

### *Mohácsi Island*

Its area is 380 km<sup>2</sup>. The elevation of this small land is between 84 and 142 metres above sea level. The area is mainly floodplain articulated by flood-free surfaces. Characteristic landscape forms such



as oxbows are due to erosion of the River Danube. There are Holocene river deposits in the area. More than 90% of the area is covered by flood soils.

#### *Mohácsi Terrace Plain*

The area of the small land is 150 km<sup>2</sup>. The elevation of this small land is between 85 and 122 metres above sea level. The characteristic height is around 93-94 metres. The western part of the area is a low flood-free plain, its eastern part is a floodplain. There are loess forms and oxbows as well in the area. The principle bedrock is from the Cretaceous, above which there are upper-Pliocene and Pleistocene strata. The eastern part of the area is Holocene flood sludge. 43% of the area is covered by cernozyom – black soil – soils created on the loess covered areas. There are also raw flood soils on 40% of the researched region.

#### *Bácskai Loess Plain*

The small land is situated in Bács-Kiskun County, with an area of 1446 km<sup>2</sup>. The elevation of this small land is between 84 and 165 metres above sea level. It is mainly an alluvial fan covered by loess and mixture of loess and sand. 80% of the surface is mildly undulate plain. The small land is bordered by terrace in the west and there are sand-drifts as well. Most of the surface is covered by 1,5-2,5 metre deep loess, its deep structure is diversified. 18% of the small land is covered by sand. Excellent soils (different types of cernozyom – black soil –) were formed on the loess.

#### *Villányi Mountains*

The small land is situated in Baranya County, its area is 66 km<sup>2</sup>. The highest point of the mountain is the Nagyharsányi Hill or Szársomlyó Hill (442 m). This low mountain range has a west-east direction with a rich geologic past and rock deposits. The basic stone types are dolomite and limestone from the Tertiary Period. A very important economic utilisation is the viticulture and also we have to highlight that a certain part of the mountain is under environmental protection. The soil types were formed on the limestone bedrock.

#### *Southern Baranya Hills*

The small land is situated in Baranya County on an area of 1307 km<sup>2</sup>. This area is a weakly articulated hilly region mainly covered by loess on which the different soil types were formed as well.

#### *Dráva Plain*

The small land is located in both Baranya and Somogy Counties, its area is 432 km<sup>2</sup>. The area is a perfect plain, more than 50% of the surface is floodplain. Its geomorphology is of course greatly connected to River Drava and its sub-rivers or streams. The most characteristic geomorphologic forms are the abandoned oxbows. Most of its soils were formed on the alluvial deposits.

#### *Fekete-víz Plain*

The small land is located in both Baranya and Somogy Counties as well, its area is 507 km<sup>2</sup>. The elevation of this small land is between 96 and 212 metres above sea level. It is greatly a terraced area, in the southern parts with alluvial fan covered by shifting sand.

#### *Nyárad-Harkány Plain*

The small land is situated in Baranya County. Its area is 359 km<sup>2</sup>. The elevation of this area is between 89 and 162 metres above sea level and it is also a terraced alluvial fan turning to hilly areas on the northwest. Most of its area is a low flood free plain.

The climate of the analysed area is basically temperate zone continental but – particularly south from the Mecsek Mountains – the Mediterranean influence predominates in the right bank of the Danube which can be revealed in the higher number of sunny hours and the milder winters.

The area is fundamentally rich of water courses; the most important rivers are River Danube and River Drava, but we can also mention the Gyöngyös and the Pécsi-víz as well. There are numerous much smaller water courses and streams mainly in the area of the Siklósi and Mohácsi Micro Regions and also ponds and lakes as well.

The area is particularly rich of thermal waters. The most important spas of the Siklósi Micro Region is the internationally famous and well known Harkány (sulphurous and radio active curative water with international significance), and there is an important one in Siklós as well.

The most important area of nature protection is of course the Danube-Drava National Park. The Danube Valley and the other water habitats are extremely important in terms of nature protection out of which the national park owns the Gemenc-Béda-Karapanca areas, the Érsekcsanádi oak forest (nature protection area), the Érsekalmi Hét-völgy (Seven Valley) (nature protection area), the Drava River, the Fekete Hill and Szársomlyó Hill, the Mohács Historical Memorial, and the Templom Hill in Villány. Of course the mentioned regions have a unique and special flora and fauna as well.

## **SERBIA**

One of essential phenomenon in this area is river dynamics, which induces and influences all other driving factors in the area. Danube and its flooding dynamics create extraordinary hydrographic mosaic and beautiful landscape. Annual water level fluctuations, and especially high water levels are key factors in shaping of these dynamics. High level lasts 1-3 months and are mostly pronounced in the vegetation period. Large part of ecosystem keeps preserved water dynamics, while one part of former floodplain is cut-off from the direct influence of flooding by building of flood-protection embankment in 1960's.

Different dead water branches are under different phases of natural succession, sometimes supported by human activities and active fight against accelerated succession. On all of them level of human activities are very low and support rich biodiversity, Forests are natural, semi-natural, and managed, but are a large part of Reserve that is well preserved and attractive for wildlife. In the highest parts of Gornje Podunavlje, far from the water level, ancient alkaline grasslands exist with its special features and very adaptive wildlife.

Out of numerous animal groups, the most outstanding attraction in this area are birds. With up to 280 species present in the area, Gornje Podunavlje is one of the most important bird sites on national and European levels. It comprises the most important parts of national breeding populations of White-tailed Eagle, Black Stork, Black Kite, Graylag Goose and huge concentration of wintering waterbirds.

### *2.1.3.2. State of the environment*

## **CROATIA**

According to the available data in the area there are no serious problems with the air and water pollution due to low population density, small amount of polluting industry and exposure to winds due to flatland area. Eventually larger air pollution and some noise can exist only in Osijek due to car traffic, but much under serious levels. The study area is rich in ground waters, so the drinking water is mostly supplied from groundwater sources through the network of public water supply systems using underground water. Quality of drinking water is not satisfying due to the lack of waste water management system, for both households and the industry.

## **HUNGARY**

In the Siklósi Micro Region the main air pollution source is the Beremend Cement Factory and the lime stone mines. We also have to state that the Szársomlyó Hill as a protected area is partly mined as well. The thermal fountains and resources should have an increased protection in the area and also the Villány-Siklós Wine Region. It is an extremely important and urgent task in the area to create the circumstances for modern sewage disposal and waste management.

There are primarily local polluting sources on the Mohácsi Micro Region, where the most important polluting factories are functioning far from the residential zones. The most important source for pollution is determined by the local population and the transport air pollution. Here as well the waste and sewage management of the small settlements are partly unsolved.

In the Bajai Micro Region the devastation of the natural values was due to the earlier effectuated surface water management and by the intensive agricultural sector. The charging with sludge of the former oxbows makes another environmental problem around the River Danube. It was also hazardous that the low floodplain areas around the Danube were built as well without major water management actions. All of the settlements in the micro region are provided with drinking water but sewage pipes and cleaning is only in Baja and Gara.

## **SERBIA**

The PP area represents generally well protected natural ecosystem with special relief and hydrographical characteristics which generated bio-diversified system. This area is under strong influence of anthropogenic factors specially on the close distance to the Danube river.

There are six major polluters in the area. Two environmental degradation points are located in Apatin (textile factory and the city canalisation). There are also several farms in the area that are contributing to the pollution.

Besides the water pollution there are other polluters in the area: air and soil polluters and hazardous elements for flora and fauna.

That are some industrial plants which are operating on without strict environmental rules, but there are no signs of extreme air pollution in the area.

The soil pollution is mainly the consequence of inappropriate waste management.

### *2.1.3.3. Heritage protection*

## **CROATIA**

Besides rich natural heritage with an accent in Kopački rit nature park and the whole area close to Danube and Drava, the study area is very rich also in cultural heritage. Although there are no UNESCO World Heritage sites here as in the coastal part of Croatia, there are two objects on the tentative list of UNESCO - Croatian part of the Frontiers of the Roman Empire - Danubian limes along the Danube in the whole study area and Historical Town Planning Ensemble Tvrđa (Fort) in Osijek from 18<sup>th</sup> century. 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. In the chapter Tourist attractions all the natural and historical heritage as well as other attractions are shown in the table, with the presumption of their tourist importance and level of touristification.

In spite of richness, the numerous archaeological remains, especially near proposed Danubian limes along the Danube near Batina, Bilje and Dalj, are not in condition to be presented to tourists. The situation is better regarding the heritage from the period after 18<sup>th</sup> century with many preserved fortresses, castles and manors, Besides Tvrđa as the most important monument, there are well preserved manors in Bilje and Tikveš near Kopački rit in Baranya and some other in Tenja and in Osijek's suburb Retfala which need better inclusion in the tourist offer. The manors in Bilje, Retfala and Tenja distinguish themselves also with nice parks around them, protected as natural heritage. Potentially attractive is also the ruined fortress in Erdut with a magnificent view over Danube.

The most important church in the area is *Osijek Cathedral* of Saint Peter and Paul, but probably the most visited is unique recently built Church of Our Lady of Sanctuary in the village Aljmaš near the confluence of Drava in the Danube as the most important pilgrimage site in the whole Eastern Croatia. Very interesting is also the small church of *St. Peter and Paul* in Topolje near Draž built by the famous general Eugen of Savoia in the memory of the liberation of the land from Ottoman Empire. Another important churches include orthodox Saint Dimitrus church and patriarchal manor in Dalj with nice park, reformist churches in Kneževi Vinogradi and Lug, Saint Mary church in Bilje and the church of the Assumption of Blessed Virgin Mary in Duboševica near Draž.

Among other monuments of built heritage two can be highlighted - Unique monumental memorial to Red army in Batina on very attractive view point over Danube river with small War museum, and The birth house of the famous Serbian scientist Milutin Milanković in Dalj, converted into small museum. The most attractive museums in the study area otherwise are National museum of Slavonia and Archaeological museum located in the Osijek Tvrđa and making important contribution to its tourist attractiveness.

As combined natural and cultural heritage two beautiful wine growing areas can be highlighted - *Baranya wine area* with famous cellars built in sand slopes in villages Zmajevac and Suza wine cellars, and Erdut wine area over Danube, protected also as important landscape, with one of the *largest wine barrels in the world*<sup>2</sup>. Rich ethnological heritage can be seen in many traditional villages, especially in Baranya like Kopačevo, Zmajevac, Suza and Karanac. There are also many *traditional festivities* in those and other villages like round the region. The most important are Slama (“Straw”) land art festival in Lug near Kopački rit, Surduk festival in Baranya vineyards, and in Osijek the Summer of culture and Antiques fair in Tvrđa as examples of urban traditions. Osijek is well known also for many modern urban manifestations – the most well known and visited are UFO Urban fest of modern music and Pannonian challenge – festival of extreme sports in Osijek . The main tourist attractions in the Study area are illustrated by the figure below.

## HUNGARY

Built and cultural heritage is just as important as the natural features in all the three micro regions of the area. Almost all the important churches and castles or manors are under monumental protection. We also find numerous monuments and religious memories out of which we have to highlight the most important one, the Mohács Historical Memorial. The most well known traditions are connected to the ethnic groups and minorities of the area. Here the internationally known and UNESCO Cultural World Heritage since 2009, the Busójárás in Mohács should be highlighted.

## SERBIA

The project area belongs to the North Backa cultural region which is determined by clustering of specific cultural heritage and dominated by two important urban centres in Vojvodina – Sombor and Subotica.

The North Backa Cultural region is overlapping with the Danube cultural route in the area of GornjePodunavlje. Pannonia plain and the Danube river provided the platform for development of specific cultural setting boosted by constant migrations and historically autonomous status of Vojvodina. Such circumstances generated diversified cultural heritage.

Heritage in the region is managed by grouping it in the different protection categories: cultural heritage (cultural heritage of extraordinary importance, high importance and important cultural heritage), important places and monuments of culture.

Cultural heritage is dominated by sacral architecture (18 and 19 century churches). In almost every settlement, there are sacral monuments, very often of two or more different religions. Important administrative and civil buildings of extraordinary architectural and historical value are common in Apatin and Sombor.

There are WWII memorials with significant architectural value that are not properly managed in last two decades, but lately appearing as new old attraction for tourists.

Industrial heritage is also represented in the region with the protected old factories, machines and industrial buildings. Industrial heritage is dominated attractive and massive piece of infrastructure built as part of Danube-Tisa-Danube Canal (DTD). The channel is a unique hydro-engineering system for flood control and hydrotechnical, amelioration forestry, water supply, waste water evacuation and navigation. The Channel network and water regulation system has been developed and used for more than two hundred years. Construction of a system of channels, 239 km in length, with sluice

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<sup>2</sup> Oak barrel of 75.000 litres; in Guinness Book

dams, pumps and bridges had begun in 1793 to be completed in 1901. A part of that system is still in function. Preserved dams were transformed into locks, swimming pools. 19th century pumps with preserved mechanisms are used as auxiliary water plants.

## **2.1.4. Infrastructure**

### *2.1.4.1. Accessibility relations*

#### **CROATIA**

Having in mind that Osijek is as a capital of the county and the most important urban centre of the whole Eastern Croatia is a part of the study area, the accessibility relations are very good. Osijek is well connected with the capital of Croatia with a four lane motorway – the distance is 280 km, or about two hours and 30 minutes drive. Considering the position near the borders the area has good connection with the neighbouring countries. There is an international border crossing with Hungary near Duboševica in the municipality of Draž on the corridor Vc as the most important road in the area. There are two border crossings with Serbia over the Danube river – near Batina in the north and near Erdut in the southern part of the area. There are also railway border crossings with Serbia also near Erdut over the Danube river and with Hungary slightly western from the study area.

It is interesting that the distances from Osijek to the two capitals of the neighbouring countries Hungary and Serbia are shorter than to Zagreb - to Budapest there is 260 kilometres and to Belgrade 240 km. The driving distance to Budapest is much longer (about 4 hours), because the majority of the way is not on motorway and to Belgrade is 2 hours since it is almost all on motorway. The distance from Osijek to Budapest is shorter than to Zagreb. Inside the study area it has to be mentioned that the municipalities closer to Osijek are generally better developed – to Bilje there is only 8 kilometres, to Dalj (centre of Erdut municipality) 30 kilometres, to Kneževi Vinogradi 35 kilometres and to the most distant and least developed municipality Draž 55 kilometres.

The most important tourist localities are also relatively close – Kopački rit nature park entrance is 15 kilometres from Osijek, pilgrimage site Aljmaš 30 kilometres, Erdut 37 kilometres, Zmajevac in the Kneževi Vinogradi vineyards area 40 kilometres and Batina as the main settlement in Draž municipality 50 kilometres. The roads are good and all the settlements are connected with regular bus lines. There is a railway connection from Osijek to Erdut and to Baranya, but without stations in the study area. and Erdut 50 kilometres.

#### **HUNGARY**

On the right side of the River Danube the accessibility relations improved significantly by 2010 and the M6 motorway was delivered on 31<sup>st</sup>, March. It means that the basic problem of the area – which peripherality – has been improved but still we have to emphasize that in terms of accessibility the region is very poor, since the capital is located far from the micro regions, and the county seats as well. For Baja which is the central settlement for the Bajai Micro Region the county seat Kecskemét is 100 km-s away and the regional centre, Szeged as well.

The three micro regions are connected together with mainly public road system, where the road quality and the infrastructure definitely need further improvement. There is one bridge in the area in Baja which serves the connection and accessibility. Also there is a ferryboat in Mohács to connect the areas of the left and right side of the River Danube.

#### **SERBIA**

Sombor is the most important urban centre in the area and west Vojvodina with the regional center status. Therefore it has established relatively good connection with Novi Sad and Subotica as two most important urban centres in Vojvodina. The distance to the closest four-lane international highway (corridor X – E75) is 50 km. The highway is linking the region with the capital Belgrade and

southern Serbian provinces. There is one international border crossing with Hungary and there are two border crossings with Croatia over the Danube river and a railway border crossings with Croatia. The railway also connects Sombor with Novi Sad and Subotica. Within the pilot project area tourist attractions are rather well connected to urban centres and other settlements.

#### *2.1.4.2. Transport*

### **CROATIA**

The Kopački rit area is located on the main European transport network and therefore the transport connections in the area are generally good. This is especially case with the road transport, because the area has an access to motorway on the corridor Vc connecting Budapest in Hungary with the Croatian port Ploče on Adriatic sea through Bosnia and Herzegovina.

The section of the corridor Vc through the study area is a part of the State road No 7 connecting Duboševica near Draž on Hungarian border with Slavonski Šamac on Bosnia-Herzegovina border and is built as motorway (A5 motorway) between Osijek and Sredanci on Paneuropean corridor X (Zagreb – Belgrade motorway).<sup>3</sup> In the study area the motorway is only touching the Osijek town area at the west and State road No 7 is therefore going slightly western from study area touching only the areas of the town of Osijek and the municipalities of Kneževi Vinogradi and Draž.

Other roads of national importance are State road No 2 connecting Dubrava Križovljanska on Slovenian border over, Varaždin, Virovitica, Našice and Osijek to Vukovar and easternmost Croatian town Ilok with Serbia. Since it follows the flow of Drava river in Croatia on its southern side it is known as “Podravska magistrala” (Drava road), and it goes from the west to the east, different from State road No 7 going from the north to the south. The remaining roads of national importance in the study area are State road No 34 from Osijek’s suburb Josipovac towards the west parallel with “Podravska magistrala”, State road No 212 from Kneževi Vinogradi junction on No7 road over Batina and Danube bridge towards Sombor in Serbia, State road No 213 from Osijek suburb Nemetin on No2 road over Erdut and Danube bridge towards Novi Sad in Serbia and State road No 518 from Osijek towards the south and Vinkovci in Vukovar-Srijem county. Short links of Osijek river port in Nemetin (No417) and international airport in Klisa (No418) with the State road No2 also have the state status.

Other roads with county status or less are also generally in good condition and all the settlements have modern roads connecting them to the road network. The public bus connections are generally good, because Osijek functions as important centre for the commuting transport with good and relatively frequent links towards the surrounding areas, especially to its suburban areas and to Bilje on the main road connection towards Baranya. Besides capital Zagreb, Osijek is the only town in Croatia with tramway transport, what is important regarding air pollution prevention. The level of motorization in the area is much lower than the country average – there are no data for particular municipalities, but in the county in 2009 there were 2,67 people per one vehicle, what is much less than the Croatian average of 2,21 persons per vehicle.

Osijek is important railway junction in Croatia with railway lines going in five directions. For the study area the most important is the connection towards east and Erdut and further on to Dalj and Bogojevo in Serbia (at the moment not in function), because it is important for the eastern part of the town of Osijek and have stations in all settlements in Erdut municipality. The another important line connecting Osijek to the north with Beli Manastir and Hungary goes slightly west from the study area and therefore has no stations in the study area except in Osijek. The similar situation is with the remaining three railway lines towards the west, southwest and south with few stations only in the

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<sup>3</sup> After proposed building of the continuation of the motorway from Croatia to Bosnia and Hercegowina the new border crossing and the bridge over Sava river will be built near Svilaj western from the actual border crossing

area belonging to the town of Osijek. The problem is relatively slow speed of trains and low condition of Croatian trains in general, but it is one of the rare parts of Croatia with relative large usage of railroads in passenger transport, especially in suburban traffic.

Although Danube river as Paneuropean corridor VII is becoming more and more important at the moment there are no ports on the Danube in the study area used as a port for goods or passenger river cruising. Since Drava also navigable, there is some river traffic in Osijek and there are plans for the inclusion of Osijek port to river cruises. Access to the Danube is possible in Batina, Aljmaš and Dalj, so there are plans for building of additional ports, especially for tourism purposes.

In the southeast edge of the study area there is Osijek - Klisa international airport with more and more connections every year due to attraction of budget airlines. At the moment the airport is not of big importance due to small number of flights, but there are more and more connections every year due to attraction of budget airlines. The capacity of the airport is 150.000 passengers a year, and in perspective it can serve as the regional airport, including for neighbouring countries. Thanks to budget airlines, the airport is used more and more by Croatians from the western part of continental Croatia and by the people from Vojvodina in Serbia and Hungarian Baranya.

## **HUNGARY**

Due to its geographical location all the micro regions provide the basis for international relations towards the south and southwest but we have to take into consideration that the international transport relations are still not adequate enough for today's needs and expectations. The transport geographical potential of the area could be strengthened with the southeast-European countries (Romania, Bulgaria, Turkey), the Western-Balkans (Croatia, Slovenia, Serbia) and – due to the Danube-Main-Rhine channel – with the dynamism of the southeast-northwest transcontinental water routes.

The road quality definitely needs improvement, though the M6 motorway provided a much better transport position for the area from the spring of 2010. The train infrastructure definitely needs further improvements. Water transport is also not utilised enough on River Danube. In terms of the sustainable utilisation of the River Danube, the Danube Strategy will hopefully provide new energies and projects to strengthen this resources of the area. The number of border crossing points is adequate enough.

Nevertheless the geographical periphery allocation is the most conspicuous in terms of transport geography since the areas are located relatively far from the transcontinental transport corridors (TEN) or it has not been latched on to the transport networks adequately enough (Corridor V/c).

The areas in Baja and Mohács have a highlighted role in transit transport which can be utilised in train, public road and water transport as well. There is also the potential to become both Baja and Mohács a logistical centre where the advantages of the different forms of transport could be connected together.

Further developments are needed to enhance transport with the development of the port in Baja and Mohács, the reconstruction of the bridge in Baja, the reconstruction of the railway lines (e.g. Baja-Szabadka-Szeged line) and the modernisation of the border crossing points.

## **SERBIA**

The transportation network in this part of Serbia is largely based on road transportation. There are following road capacities in the region:

- State road class I no.18: Hercegszanto (Hungarian border) – Bezdan – Smbor – BackaPalanka – link to the corridor X Belgrade-Zagreb (partially over Croatian territory)
- State road class I no.17.1: Batina (Croatian border) – Bezdan – Sombor – Subotica (Kelebija) – Tompa (Hungarian border)
- State road class I no.3: Erdut (Croatian border) – Bogojevo – Kula – Vrbas – Srbobran – corridor X Belgrade-Budapest - Becej – Novi Becej – Kikinda – Nakovo – Romanian border
- State road class II no. 101: Kula -Sombor – Apatin – Sonta – Bogojevo.

Further development and upgrading of state roads are one of the major priorities of national government.

The railway network in the area consists of regional railways:

- Sombor – Bogojevo – Croatia
- Sombor – Apatin – Sonta
- Sombor – Backi Monostor – Backi Breg

Local railway network could provide be very interesting transportation modality for tourist commuting within the region due to the rather good local connections. However it requires modernization and great improvement.

There is one military airport in Sombor which destiny is uncertain with possibility of requalification into a civil airport. So far, the international airport in Belgrade is the closest in Serbia for cargo and passenger transport.

All the navigation routes in Serbia are linked directly or indirectly to the Danube river which is to become strategically the most important transportation hub in the country. National development strategies are highlighting the revitalization of old and provision of new infrastructure on the river in order to provide good transportation flow. The most important points in that concept will be Intermodal transportation centers.

#### *2.1.4.3. Life quality and settlemental public works services*

### **CROATIA**

The study area is relatively well covered with water pipeline systems, especially the town of Osijek where 99% of housing units are connected to the system. According to the last precise data from 2001 total 86 to 88 per cent of households in the municipalities of Bilje and Erdut were connected to the water pipeline system, in the municipality of Kneževi Vinogradi this percentage was 75% and the worst situation was in the municipality of Draž with only 61 per cent of households connected to the public system in 2001. The similar situation is with the sewage system so it is necessary to improve the communal infrastructure and increase the coverage of the population by drinking water of high quality and the sewage system.

The problem is that 28% of the population in the Osijek-Baranya county is not using drinking water from the system and the quality of drinking water is not satisfying due to the lack of waste water management system, for both households and the industry. Therefore it is necessary to improve the quality of drinking water through the renewal of existing infrastructure and to build the new one in order to increase the coverage of the population by drinking water of high quality. The existing public sewage systems are obsolete and their maintenance is the main issue due to the large investment requirements.

The penetration of electric power network is 100%. and there are enough transforming units in terms of installed power. Due to the increase of consumption and new customers in the future will be necessary to upgrade the standards. In Osijek-Baranya County, rate of connection of the population to the public sewage system is around 45% (national average). The highest rate of connection is in urban areas. Osijek, Našice, Valpovo and Belišće have 90%; Đakovo, Donji Miholjac i Belišće 80% while Beli Manastir has 10% rate of connection to the public sewage system.

### **HUNGARY**

All in all the life quality and settlemental public works services do not meet yet today's requirements in the researched area. Sewage water disposal and pipes are not yet carried out in every settlement, partly due to the very sporadic small settlements. Of course sewage water and waste management is solved in the greater settlements of the area, but the smaller villages still need a strategy and projects to solve the problem.



Drinking water and electricity is initiated in every settlement, while gas can be found again in the greater towns of the 3 micro regions. The pipeline gas maintenance of the Bajai Micro Region is better than the national average.

Although sewage pipelines and drinking water is initiated, the ratio of the connected flats and apartments in the Bajai Micro Region is around 45%, in the Mohácsi Micro Region almost 70%, and in the Siklósi Micro Region is the lowest, almost 40%. We also have to state that these ratios and values are – sometimes much – lower than the county, regional and national average.

## **SERBIA**

Almost the whole area has been covered by irrigation system. Just some small surfaces are not covered by the extensive system. There are also the pumping stations that are dumping extra water in the water receptors.

91,5% of inhabitants is connected to public drinking water network in the whole region.

Water supply is sufficient and on the satisfying level. All the settlements have their own water supply systems apart from few that are connected to the system of larger urban areas Apatin and Sombor.

The quality of supplied water is not on satisfying level in all settlements. In some settlements there is high level of iron. Bigger consumers (industrial plants like brewery in Apatin) consume water from their own supplies.

The sewage system has been done so far just in Apatin and Sombor.

### **2.1.5. Spatial structure**

#### *2.1.5.1. The conformation/set of the spatial land utilisation*

## **CROATIA**

There is a regional plan for Osijek-baranya county, which includes general plan of land utilization from the year 2002, now in a process of revision. There is a detailed spatial plan for the city of Osijek from 2005 with revisions from 2009 and General urbanistic plan from 2006, actually in the process of revision. A detailed spatial plan that includes land utilization exist also for the area of the Kopački rit nature park from 2006 and all four municipalities - for Bilje, Kneževi Vinogradi and Draž from 2005 (with revision for Kneževi Vinogradi in 2009) and for Erdut from 2006. There also also some detailed plans for land utilization for 16 small locations in Osijek (including central square and University in Tvrđa) and three in the municipalities - Središte in Bilje municipality, Topoljski Dunavac in Draž municipality and Recreational centre in Kneževi Vinogradi municipality. Although the whole area is well covered with adequate planning documents, their quality is not always high and they are often inflexible, so they are many cases of their disrespect and additional changes.

## **HUNGARY**

The settlement's plan supply is all in all heterogene in the analysed micro regions. The directing settlement plans are quite often out of date primarily in the southern, more underdeveloped areas and in the small or micro sized villages (if they have any).

The provision of settlement directing plans in the greater towns of the micro regions are adequate in quantity and quality and are satisfying the requirements of regional planning.

## **SERBIA**

The settlement structuring is based on spatial development schemes that are integral part of Municipal spatial plans. They are rather rigid and irrational land use plans with no strategic components. In larger centres there is certain number of informal construction, although most of such structures passed the legalisation procedures. There is evident overall lack of creativity in spatial

development which is probably the consequence of poor involvement and participation in decision making on local level.

#### *2.1.5.2. Settlement system*

### **CROATIA**

The area in concern was inhabited since very early time, what can be proved in various prehistoric remnants throughout the area and especially close to the Danube river. The first known inhabitants were various Illyrian tribes. Osijek become important antique Roman colony Mursa and during Roman rule the area was exposed to many invasions of Celtic and Gothic tribes and finally Huns who destroyed the gown and the surrounding area in V century. Croats came to the area about 7th century but later become of the great Hungarian kingdom. In the beginning of 16<sup>th</sup> century the Ottomans conquered the whole area and rebuilt it in oriental style. In 1566, Suleiman the Magnificent built a famous, 8 kilometre-long wooden bridge of boats in Osijek, considered to be one of the wonders of the world.

After long period of battles between Habsburg Empire and Ottomans, by the end of 17th century the Ottomans were defeated and the whole area become a part of the Habsburg Empire. At the beginning of the 18th century the famous Tvrdča was built and many immigrants come to the area – besides Croats and Hungarians in Baranya there were also many Germans, Serbs Italians, French and other. Especially flourishing period was the beginning of the 19th century when Osijek became a Free Royal City and was certain period the largest city in the whole today Croatia. After the reorganization of Habsburg empire into Austro-Hungarian empire in the mid 19th century the area become a part of the Hungary, with remark that Baranya was oriented towards Pecs in today Hungary as centre, and the rest was mainly part of the Croatia and Slavonia as separate entity in the Kingdom.

The situation changed in 1920 after the end of First World war and dissolution of Austro-Hungarian empire, when the study area became a part of the Kingdom of Serbs, Croats and Slovenes, later called Yugoslavia. In this period the economic growth has slow down and the area lost its importance. During the Second World War the area was heavily damaged, especially the town of Osijek and after the war many Germans left the area. After the war the whole area become a part of Socialist Republic Croatia in Socialist Federative of Yugoslavia. Between 1991. and 1995. the area was heavily destroyed again during the Croatia's war for Independence. This is the reason for the actual relatively low level of development in comparison with the past, but the recovery has started in spite of the actual world crisis.

Actual unequal population density of the area is therefore also the consequence of the historical reason, especially the low population density of three municipalities in Baranya with only about 20 inhabitants per square kilometre. Due to the much higher population density in the area belonging to the town of Osijek (655 inhabitants per square kilometre), and about 50 inhabitants per square kilometre in Erdut municipality, the average population density is 138 inhabitants per square kilometre in 2001. The only urban settlement is Osijek, but the majority of settlements around it in the area belonging to the Town of Osijek can be considered as semi urban. The remaining areas are mainly rural, with remark that rural character is much more featured in the more distant small villages in Baranya then closer to Osijek.

There are total 38 settlements in the study area, with remark that they are generally much smaller in Baranya (average about 610 inhabitants in 2001) then in the Slavonian part of the study area (2.200

inhabitants excluding Osijek). Besides Osijek which is with 90.411 inhabitants in 2001 the biggest town in whole Eastern Croatia, there are total six settlements with more than 2.000 inhabitants. Three of them are suburban settlements near Osijek - Višnjevac (7.146), Tenja (6.747) and Josipovac (4.395 inhabitants), and the remaining are Dalj (4.689) as the largest settlement and the seat of the Erdut municipality, Bilje (3.224) and Bijelo Brdo (2.119) in Erdut municipality. More than 1.000 inhabitants lived also in the settlements Batina as the largest in Draž municipality, Kneževi Vinogradi and Karanac in Kneževi Vinogradi municipality and Brijest, Briješće and Sarvaš in the area belonging to the town of Osijek.

## **HUNGARY**

Main road No. 58 divides the *Siklósi micro region* into two different areas in terms of economy: the eastern part is the more developed characterised by more popular settlements which are usually micro centres and the western part is having mainly very small or micro villages.

Beremend is the most industrialised settlement of the micro region.

The central settlement is Siklós, but we can highlight Villány and Harkány as well which all have an important tourism and the first two a wine producing economy. All the three are towns.

The *Mohácsi Micro Region's* settlement structure is having two towns (Mohács with 19 701 inhabitants and Bóly with 3882 inhabitants) and 45 more parishes. The area is populated by characteristic middle-sized villages. Around 38% of the micro region's population live in Mohács which has a decisive role in terms of economy, transport and education as well.

Mohács is bordered by a more popular series of settlements (Dunaszekcső, Lánycsók, Bóly). Bóly became a town recently which is due to its decisive economical potential. Lánycsók is slowly but surely becoming the "sleeping village" of Mohács.

The central settlement of the *Bajai Micro Region* is of course, Baja with a population of 37 717 persons. Its spatial relations and attraction escalates the complete Bácska area over the national border as well. The town is an economical, transport, educational and administrative centre as well. The most populated micro region among the analysed regions possesses much greater settlements/villages than the ones on Transdanubia, for example Vaskút with 3642 persons, or Bácsbokod with 3025 inhabitants.

## **SERBIA**

The region has relatively structured and balanced settlement network. Due to the general planning reconstruction of the whole settlement network system in 18th century the region got basic population distribution guidelines that shaped the present settlement network. Basic characteristic of the settlements in the region is strict geometrical spatial composition.

The connections between cities (Apatin and Sombor) and the villages in the region perform in both directions and commonly are stronger if they are closer.

Taking in consideration the administrative criteria, the development level of some city functions, location and importance in the network, TICAD project area settlements are grouped in three following categories: Cities – macro regional centers, provincial centers or regional centers; Urban settlements – municipal centers; Rural settlements

### **2.1.6. Economy**

## **CROATIA**

Regarding the development level, Osijek-Barany County occupies the 14th place out of 21 measured by the index of development. Pilot project area as the part of Osijek-Baranya County consists of five administrative units: City of Osijek, municipalities Draž, Kneževi Vinogradi, Erdut and Bilje. According to the development index, apart from the City Osijek which belongs to the category IV,

municipalities Draž, Kneževi Vinogradi and Erdut belong to the second category of development with the value of the index under 75% of the national average, while Bilje belongs to the third category.

The entrepreneurial activity measured by the number of companies per 1.000 inhabitants in the area is 24, but without Osijek it is under one (0,67). At the end of 2008 there were 2.236 companies within the pilot area, but excluding Osijek there were only 150. Companies registered in four municipalities represented 4,5% of the County total (3.326).

City of Osijek is centre of economic activity in the region with developed all kinds of industries among which processing industry, construction and trade should be emphasized.

Within the processing industry, Osijek is familiar after food processing industry (milk, confectionary, sugar, etc.), metal processing industry, chemical industry, textile industry.

According to the annual revenue in 2009, three companies registered in Osijek were among top five such as Žito and Belje both vertically integrated systems engaged in primary agriculture production, fodder and food processing and Osijek-Koteks as the construction company.

Agriculture is the most important economic sector in the region and consequently in the pilot project area. Apart from Osijek, two large companies are situated/registered within the pilot project area: Belje dd and Erdutski vinogradi (Erdut vineyards). Belje is the part of Agrokor corporation. It is engaged in crop husbandry on around 20.000 ha in Baranya, vegetables growing, fodder production, pig rearing, milk and bovine production. It also has units of food processing (cheese, meat, flour, wine) and the tourism sector. It employs around 2.000 people. Production units of Belje are mostly situated in the pilot project area. Erdutski vinogradi (Erdut) is engaged in wine production on around 500 ha of vineyards, employing around 200 people.

Large companies in the pilot project area are the generator of local development in terms of development of cooperative relationship with local famers within the vertically integrated supply chain.

Pilot project area apart from the City of Osijek is predominantly rural area where agriculture plays a significant role in the development of local communities. Out of around 200.000 ha of arable land in Osijek-Baranya County, around 15% is in the pilot project area<sup>4</sup>, where family farms own around 50%.

Family farms are engaged in crop husbandry (wheat, corn, barley, canola, sugar beet), vegetable production (open system and greenhouses), grape growing, wine production, milk production, animal husbandry (pig, cows, goat).

Osijek-Baranya County has above average rate of unemployment. In the first nine months of 2010 the average county rate of unemployment was 26,2%. According to data for 2010, in the pilot project area there were 36% of the total unemployment in the county or 8,1% excluding Osijek.

As for the employment<sup>5</sup>, at the end of September 2010, 58,7% of the workforce of the county was employed within the project area, but only 2,4% in the area without Osijek..

## HUNGARY

The *Siklós Micro Region* can be classified among the small group of micro regions with good natural and human resources, significant production potential and good market positions. It utilises its good arable land endowments with the production of well known quality products, its natural values and cultural heritage is envired by significant tourism demand and its settlements are preserving their traditions and badinage which further increases their tourism attraction.

All in all its economy is moderately developed due to the earlier mentioned division between the western and eastern parts, where the eastern areas are much more developed in terms of commerce, tourism and services.

Among the moderately developed micro regions we can highlight the *Mobácsi Micro Region* which has a good economic potential and development level as well. We have to state that its natural and social

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<sup>4</sup> Agriculture census 2003

<sup>5</sup> Croatian Employment Bureau Osijek

endowments provide a greater potential than utilised so far. The area is a prominently good agricultural land. In the 1990s the settlements along the Pécs-Mohács axle were significantly industrialised and also the agricultural ventures developed. Further development could be utilised from a logistical centre in Mohács, the more adequate utilisation of the River Danube and the creation of an enterprise zone.

The *Bajai Micro Region* has also excellent positions in terms of agriculture with favourable climate conditions and soil types as well. On the other hand water management is very important since in its eastern parts the soil water decreased dramatically while on the western areas along the River Danube the irrigated lands are dominating.

## **SERBIA**

The area possesses of highly productive agriculture and integrated economy. This region feature good pedological, climate conditions, and convenient structure of agriculture production (with the domination of sectors with more intensified use of capital comparing to other regions in Serbia).

In comparison to other regions in Serbia, this region has adequately developed human resources, entrepreneurship, diversified industrial sector and well developed physical and economic infrastructure. As the consequence of the development, the region figures in good socio-economic indicators.

### *2.1.6.1. Industry*

## **CROATIA**

The economical situation in the area is different in the area belonging to the town of Osijek and the remaining municipalities. In Osijek here is the largest share of people employed in industry and construction, which is much lower in other municipalities, especially in the most distant and most rural municipality of Draž (12,4 per cent). Almost the same share of people employed in industry and construction in the municipalities of Bilje and Erdut (20-26 per cent) more closer to Osijek is a consequence of daily migration. Table below provide overview of the employment by sectors in 2001, collected during the census of the whole population

## **HUNGARY**

Within the *Bajai Micro Region* in Baja 32,5% of the active population are employed in industry. The modernisation and development of the micro region is of course very much dependant on the positions of the central settlement, Baja. The Industrial Park of Baja is the most significant attraction of the area to the development of the industry. The utilisation of the park was 100% in 2006, when the regional average was only 43%. The biggest firm is the AXIÁL Kft. But there are 26 more ventures as well employing almost 1000 persons altogether.

The industry of the *Mohácsi Micro Region* primarily concentrates on the micro regional centre, Mohács. Concerning its structure the agricultural processing industry is playing a decisive role. The characteristic branches are: mill industry, mixed fodder making and canning. Light industry also play an important role with furniture industry, silk spinning mill, textile and clothing industry and leather and shoe industry. Heavy industry is characterised by engineering industry (Mohácsi Vasöntöde and MOFA) and wallboard making industry. Further most important firms are: Barázda Kft., Podravka Kft., Ép-gép Duna Kft., Bóly Rt., Belvárdgyula Rt.

Beremend and Siklós are the most industrialised settlements of the *Siklói Micro Region*. The most important – nationally known – members of industry in Beremend are the Duna-Dráva Cement Kft. and the Carmeuse Hungária Mészgyártó Kft. which are functioning in construction industry. The only industrial park of the area (Serene Industrial Park) is allocated in Siklós, where there are 22 ventures altogether. The problem of the enterprise structure of the area is that the dominance of very small sized enterprises are present which are unable to effectively dynamise industry. The ratio

of the ones employed in industry decreased from 34.3% (1990) to 26.4% by 2001. The labour force disengaged in agriculture and industry was absorbed by the services sector showing the average employment ratio of the county with 61.5%.

## **SERBIA**

The largest industrial center in the area is Apatin. It is dominated by the food industry (large brewery), ship factory, metal industry, construction materials production and others. Most of smaller settlements are in the function of agriculture. The most of entrepreneurial are from services sector. However the tertiary sector still has not reached the standards of modern living.

### *2.1.6.2. Agriculture, forestry, hunting*

## **CROATIA**

The opposite situation is in the employment in the primary sector, with rural municipalities having very large share of people employed in agriculture. This is especially a case in the municipality of Kneževi Vinogradi with strong wine production (40,3 per cent), where it is much larger not only as in the whole study area, but also in the Osijek-Baranya county (14,5 per cent) and Croatia as a whole (11,3 per cent).

## **HUNGARY**

In the *Bajai Micro Region* the ratio of the people employed in agriculture is 11%, where plough land plant production is dominant. The role of different types of corns is decisive, but we can highlight sunflower, rape and sugar beet. Within animal husbandry the importance of piggery, bovine, sheep and poultry should be mentioned. The most important firms in agriculture are: Sükösd Mezőgazdasági Szövetkezet, Agro-Sükösd Kft, Febagro Zrt. (Felsőszentiván), Csávolyi Mezőgazdasági Szövetkezet, Bácsborsodi Rákóczi Mezőgazdasági Szövetkezet, „Bácska” Kft. (Vaskút), Vaskúti Baromfifeldolgozó és Keltető Kft, Augusztus 20. Mezőgazdasági Zrt. (Dávod), Nagybaracscai Mezőgazdasági Szövetkezet, Baromfitenyésztési, Keltetési és Értékesítési Kft. (Rém). Forestry and hunting does not play an important role in the region's agriculture.

The majority of the area of the *Mohácsi Micro Region* traditionally disposes of good agricultural endowments with good conditions for growing of different plant cultures. The dynamic agrarian sector of the micro region can be handled as a strategic outbreak point. Based on its characteristics – with the improvement of the transport geography positions – it is able to produce a spectacular development. The greatest regional problem of the agricultural sector is that there were no product path developments initiated, decisively there is only raw material production.

In the *Siklósi Micro Region* the greater extent of the area is covered by a weaker quality soil type around the River Drava but a smaller part belongs to the so called “Baranya loess island”. The quality wine and viticulture is of course decisive and has a primary role in agriculture to which more and more economic activity can be connected as clusters. However in the recent decades the falling back of the agriculture – except for the mentioned grape producing – was also experienced in the area. Its role in employment is still 12.1% which exceeds by 7% of the county average.

Forestry as such has no highlighted role in the primary sector, hunting has an importance mainly in the Mohácsi and Bajai (Gemenc) but in a smaller extent in the Siklósi Micro Region as well.

## **SERBIA**

The ownership of forests in the project catchment area falls into two main categories: state and socially owned and privately owned forest land. The area of forests and woodland is 35294.84 ha accounting for 3.68 % of the total land area. The forest and woodland is grouping in two groups: land covered by forest and treeless land. State owned forest land represents more than 90%. Most of the state forests are managed by public enterprises: PE “Vojvodinasume”, PE “Nacionalni park

Fruska gora” and PE “Vode Vojvodine”. On the forest covered land the most common are mixed forest cultures with the dominant Euro-American tilia and mixed forests with pedunculate oak domination. The most of the forests were planted from selected plant sources.

The Hunting union of Vojvodina and the Public enterprise Vojvodinasume are the main managing bodies of hunting grounds in Vojvodina. The hunting grounds are spreading over forest lands with and without forest, orchards, vineyards, meadows, pastoral land and most commonly farm and arable fields. Most represented hunting wild animals are: European deer, mouflon, roe deer, wild boar, rabbit, partridge, and pheasant. Some hunting grounds are spreading over more municipalities.

#### 2.1.6.3. Services

### **CROATIA**

As expected the share of services is highest in Osijek, relatively high in the Bilje municipality close to Osijek and lower in more distant rural municipalities. The share of people working abroad, especially in Draž municipality, is an indicator of lower level of development, but also of poor offer of jobs in the area. Relatively low share of jobs in tourism is caused also by temporary employment, i.e. many people working in tourism are basically employed somewhere else. That is especially a case in rural tourism with people mainly employed in agriculture.

### **HUNGARY**

The services sector – and within that tourism – plays the most important role in the *Siklói Micro Region* which has excellent tourism endowments out of which we should highlight the curative water and spa in Harkány, the natural and monumental attractions, the Villány-Siklós wine region and wine route (which is the first in Hungary). The highlighted attractions have an international fame and demand as well.

In the *Mohácsi Micro Region* the commercial accommodations and catering places focus mainly to Mohács but with a tight variety although in recent years some new establishments were introduced as well (Hotel Szent János; 4 star hotel). Pensions and campings are to be found in Bóly, Somberek Palotabozsok, Szajk and Dunaszekcső and rural tourism guest houses in Himesháza, Nagynyárád, Szederkény, Dunaszekcső and Bár. The tourism supply does not represent enough the ethnic background and its cultural variety of the area. The most well known festival is the Busójárás which become a UNESCO cultural world heritage as well in 2009.

Tourism plays the least important role in the *Bajai Micro Region* in the analysed area. Its significance is moderate compared to the possible supply. The local population utilises this branch of economy only in Baja, Dávod and some settlements around the River Danube. Out of the tourism supply we have to highlight the natural attractions, the endowments connected to water and natural water and flood habitats (Danube-Drava National Park: Gemenc and Béda-Karapanca). These are well complemented by the thermal water capabilities of the area and hunting as well. In short we can mainly highlight the active tourism products in the area.

### **SERBIA**

The services provision is the best in urban areas of Apatin and Sombor. Villages and smaller settlements are provided by satisfying level of very basic services, although the job offer is extremely poor.

#### 2.1.6.4. Infocommunicational services

## **CROATIA**

Since there is no data on intercommunication services at the municipality level, we provide general indicative data on this subject. According to the estimations from data of 2008 in Osijek-Baranya County there are around 416 fixed telephone connections per 1.000 inhabitants. As for the internet connection, Osijek-Baranya County occupies 5th place in Croatia with 88 connections per 1.000 inhabitants. Telecommunication infrastructure is at the level of standards and technology of EU. Accessibility of services is satisfying, but the rural areas are less covered by broadband internet access.

## **HUNGARY**

Taking into consideration the infocommunicational services in the analysed area we can state that internet accessibility is provided everywhere such as mobile cover. Telehouses and info centres are found in the greater settlements of the micro regions.

## **SERBIA**

Telecommunication infrastructure (cover, capacity and the quality) in the area is generally on satisfying level.

Optical cables are linking all major centers and there is plan to cover very soon all the settlements. Internet cover is still not satisfying, but it has accelerated development. Public phones are located in every settlement.



## 3. EXPLORATION OF THE STATE OF TOURISM

### 3.1. The supply of tourism

#### 3.1.1. Tourism attractions

##### CROATIA

The study area represent the zone of the biggest concentration of tourist attractions in the whole Eastern Croatia. Two most important attractions of international importance are Osijek's Tvrđa and Kopački rit nature park – one cultural and another natural attraction. The importance of Kopački rit will be further improved after establishment of World Biosphere Reserve Mura-Drava-Danube because it will be probably its biggest natural attraction. Of international importance is Aljmaš Church of our Lady of Sanctuary as the most important pilgrimage Roman Catholic site in whole Eastern Croatia and therefore visited by pilgrims from abroad. The memorial in Batina can also be included in the locations of international importance because it is one of the rare preserved monuments to Red Army in wider area and due to exceptional importance of the Batina Battle at the end of the Second World War.

The second most important natural attraction of the area – Erdut sand slopes over the Danube are of national importance, as well as additional cultural attractions connected to Kopački rit nature park – the Tikveš manor and Kopačevo ethno village. Very high tourist value has the central square in Osijek with the cathedral of Sainte Peter and Paul and small but unique church in Topolje dedicated to the same saint. This small church and another attractive manor in Bilje were built by famous general Eugen of Savoia. Of high importance are also wine growing areas in Baranya with cellar entrenched in the sand and near Erdut with famous big barrel. In the seat of Erdut municipality Dalj there is well preserved birth house of famous scientist Milutin Milanković.

Osijek's Drava river promenade with Winter port as probably the most attractive river bend in Croatia and therefore can also be listed as attraction of national importance, as well as Osijek bathing area Copacabana and ZOO across the Drava river. Of high tourism potential is Aljmaš river bend due to location of the pilgrimage site just near the river. The numerous archaeological sites near Danube in Batina, Dalj, Kopačevo have also great tourism potential, but at the moment are not equipped for tourism usage. On the other hand, there are many manifestations in the area of high tourism importance, such as Summer of culture and Festival of extreme sports in Osijek or unique Slama ("Straw") artist gathering in Lug near Kopački rit nature park. Those festivities can also be listed as completely "turistified", what is not a case with the majority of other attractions, especially in the Erdut wine area.

There are also many other tourist attractions in the area of regional importance, from which many can be upgraded to the national importance with proper interpretation and marketing. This is especially a case with numerous attractive churches, which are often closed and do not have adequate information outside the church about their name and importance and the opening time.

Considering the particular municipalities, it is evident the greatest potential is in Osijek as the only town in the area and the major urban centre of the whole Eastern Croatia with many cultural attractions and festivities. The second most important area is Bilje as municipality in possession of the major part of Kopački rit nature park and its additional attractions. Erdut municipality is of great potential, especially the zone belonging to the protected area over the Danube bend, but also the municipality with the lowest usage of their tourist resources except in Aljmaš pilgrimage site (but only during the pilgrimage). The municipality of Kneževi Vinogradi is showing great progress in tourism with an accent on wine and rural tourism. The similar possibilities exist in the northernmost municipality Draž, with greater potential also in usage of its unique cultural attractions and position on the Danube River.

## HUNGARY

As a summary we can state that the region is rich of attractions but we also have to take into consideration that the majority of the attractions are not even known on the regional level. This is mainly due to the incomplete tourism infrastructure and suprastructure, since without a properly created supply, tourism cannot be realised on the possible tourism potential of the area. As an example: numerous settlements are located along the River Danube which presently only means a potential attraction since without the establishment of tourism as a whole no touristic demand is aiming or visiting the area so in this respect the Danube can not be characterised as a functioning attraction. Further on we present those attractions by the micro regions which play a real role in tourism so that they connect the given settlements into the tourism of the region or the country.

### *The Bajai Micro Region*

The attractions of the micro region decisively have regional and national reach, which are on the one hand utilised by domestic tourism, but on the other they induce lower income. The main reason for this is their relatively low level establishment and that on the international level they are not curiosities. The ones with higher attraction either reach the qualification for international tourism or they are very close to this category. Out of them we can highlight the Chowder Cooking Festival in Baja, the Danube-Drava National Park and the outstanding possibilities for hunting.

### *The Mohácsi Micro Region*

The micro region – similar to the Bajai Micro Region – do not abound in internationally well known values and taking into consideration their profile, they are practically similar. Out of its attractions we can highlight the Danube-Drava National Park and the so called Busójárás which is connected to Mohács and which become a UNESCO cultural world heritage site from 2009. Its significance and tourism role exceeds the area.

### *The Siklósi Micro Region*

The Siklósi Micro Region show several differences compared to the upper mentioned areas. A part of the micro region involves River Drava due to which it is connected to the Danube-Drava National Park and on the other hand we find the three settlements of Harkány-Siklós-Villány which' tourism potential is inevitable even in the international perspective. The health-, wine and cultural values of this three settlements overtops the attraction of the complete remaining areas.

### *3.1.2. Tourism product supply*

## CROATIA

The most important type of tourism at the moment is city tourism based on various business reasons, what is clearly visible through very high concentration of tourism capacities in Osijek. Besides business tourism there is strong importance of cultural tourism either as separate motivation or even more as additional activity of people participating in city tourism. The third most important form is rural tourism based on wine and other culinary type motivations, what is visible through relatively large number of good restaurants in the area and good offer of food and wine in rural accommodation. The area is well known as developed hunting destination, especially Kopački rit and its surroundings. Aljmaš is famous as the most important pilgrimage site in the whole Slavonia and one of the most important in Croatia as a whole.

Although there are no exact data, it can be assumed that there are many business tourists using rural accommodation in the area or outside it in order to economize their stay considering relatively high prices of accommodation in Osijek. Other forms of tourism are at the moment not very represented as special interest groups, although tourists are taking part in fishing tourism, bird watching, cycling,

equestrian etc. There are many possibilities for various types of tourism, especially soft sports, eco tourism and better tourism usage of great rivers – as cruising destinations, water sports etc.

## **HUNGARY**

The supply structure of the researched region can be divided into two areas. The first are the values based on natural attractions and the second is values based on the social and cultural attractions, and also the multiethnic background and historical values. In the formation of both categories the historically developed peripheric allocation played an important role due to which for instance the natural values could preserve their original characteristics and the cultural values developed differently from the neighbouring areas.

A common feature of the nature-based attractions is their “untouched” characteristic due to which their majority is handled by the Danube-Drava National Park. The bases for the attractions are outstanding even in the national level. The rivers of the Danube and the Drava and the floodplain forests mean a unique ecological habitat, which’ flora and fauna consists numerous protected species. We also have to highlight the forests, meadows and pastures of the area which remained in their natural state many times without anthropogenic influences. On account of the earlier mentioned, the possibility for eater sports and water tourism is of course restricted.

The tourism products based on cultural values can mainly be connected to the important episodes of the Hungarian history and some folk traditions as well. Their attraction is provided by their uniqueness. We also have to mention the museums and different collections of the area.

## **SERBIA**

According to available data, in the Serbian part of Pilot project area there are currently about 1,065 beds in various accommodation facilities, but they are not on the high level of quality (all of them are in anticipation of the restructuring and renovation). Tourist area in 2008 has attracted approximately 22 thousand tourists, who were organized by 86 thousand nights, with an average length of stay of 3.6 days.

Looking at the current tourism products, dominant products are business tourism (where the largest number of arrivals is achieved in Sombor and Apatin as business centers), student and excursion tourism (visits to nature reserve, cultural and historical monuments), spa tourism (spa Junaković), and a little nautical (a very small number of cruise boats stopping for non-existent infrastructure). Other forms of tourism are low, or left to individual and unorganized arrivals and overnight stays.

### *3.1.2.1. Ecotourism*

## **CROATIA**

Ecotourism formally exist in the area and Kopački rit and its surroundings are generally marketed as one of the most important ecotourism and bird watching destination in Croatia. Nevertheless, the area is still important on world ecotourism and bird watching market due to lack of labelled and fully equipped eco tourism accommodation and lack of adequate professional support for special interest groups. Recently the situation improved with more sophisticated offer for bird watchers with professional guides, but it is still far behind world famous bird watching destinations.

There are some possibilities for walking in the area and some paths, mainly in Kopački rit nature park, in the hilly parts of Baranya and on the bend of Drava river in the area of the town of Osijek, but not many marked and equipped for tourists. That is especially a case in the municipality of Erdut which is not using adequately its exceptional natural heritage possibilities and position on the hill over Danube river. There is also a possibility for educational activities connected in tourism, also mainly in Kopački rit nature park with educative paths.

## **HUNGARY**

The ecotourism supply of the region is practically restricted to the area of the Danube-Drava National Park. The core areas of the national park are the Béda-Karapanca and Gemenc areas and also the areas around the Drava Further nature protection areas are also connected to the national park: Földvári Lake in Dávod, the loess wall in Dunaszekcső, the historical memorial in Mohács, the Fekete Hill and the Templom Hill in Villány. A certain part of the mentioned protected areas are available and convenient for nature walking and hiking. The study trails in the region are connected to the mentioned national park areas and the protected areas.

There are 3 exhibition places in the Danube-Drava National Park in the area: Nagyharsány (Szársomlyó), Mohács-Sátorhely (Historical Memorial) and Kölked (White Stork Museum). They possess educational, cyclopaedic and pedagogical functions as well. There is only one forest school in Kölked.

## **SERBIA**

Gornje Podunavlje Special Nature Reserve is a large protected area of wetland in the northwest of Serbia (Vojvodina province). It comprises two big marshes along the left bank of the Danube River - the Monoštor and Apatin marsh, including 66 km (41 miles) of the Danube course (1366 – 1433 km).

Within the reserve, there is a three-level system of zones established: protection regimes of category I (1.3 %), II (24.7 %) and III (74.0 %). There is a huge biodiversity of Gornje Podunavlje Reserve. More than 150 bird species occur regularly in the reserve, amongst which a lot of threatened ones. It is an area of important aquatic and semi-aquatic vegetation, wet meadows and native lowland forests composed of willow, poplar, ash and oak trees. The area is rich in fish species, as one of the most important spawning areas along the Danube River.

Gornje Podunavlje is also an important trans-boundary area, creating a vast Central Danube Floodplains, the large trans-boundary floodplain in the middle Danube, along the route of the southern European Green Belt. It is one of the best preserved wetlands in the Danube River Basin area. A natural complex of more than 700 square kilometres (270 square miles) embraces three protected areas: the Kopački rit Nature Park in Croatia, the Danube-Drava National Park in Hungary and the Gornje Podunavlje Special Nature Reserve in Serbia.

The area is home to some important species such as White-tailed Eagle (*Haliaeetus albicilla*) or Black Stork (*Ciconia nigra*), numerous fish species which find ideal spawning conditions in the oxbows and shallow shoals of the emanated river or rare and endangered mammals like European Otter (*Lutra lutra*) and Wild Cat (*Felis silvestris*). Although suffers a certain pressure from numerous human activities, this area still remains an unspoilt natural environment for the many species which inhabit it.

In Sombor municipality there is also Association of sport fishermen “Fishermen’s club Sombor” and Eco- Recreation center. The tourist package of Backi Monoštor offers the Eco-recreation center, which was officially opened on the International Environmental Day, 05 June 2008. The Eco-recreation center consists of an amphitheater with wooden benches for workshops, training and teachings in nature, mini playground with swings and a seesaw, a polygon of the well known game, "Man do not get mad" in a macro format as well as a football field suitable for sports and recreational facilities.

### *3.1.2.2. Soft sport tourism*

## **CROATIA**

The study area is suitable for cycling due to flat countryside and lot of local roads without large traffic and good offer of restaurants and accommodation capacities. The problems include lack of separate cycling tracks, especially on some areas where it is necessary to use roads with high traffic density. There are still some areas not cleared from land mines in the 1991 War, especially close to Kopački rit nature park what can discourage the interest of cyclists. The possibilities for equestrian

tourism also exist, but it is here not so developed as in some neighbouring areas like Đakovo to the south or Slatina (Višnjica) to the west of the study area.

Fishing tourism is well represented in the area, but the majority of recreational fishermen are local people not using accommodation capacities. The situation is much better with hunting tourism and Kopački rit area is famous as top class hunting destination for big game hunting (especially deer). There are few hunting lodges specialized for hunters, with remark that hunters are also using regular hotel and private accommodation. Although hunting tourism is one of the rare completely developed tourism products in the area, its importance is decreasing due to strong competition in newly discovered Eastern European countries such as Poland or Romania and complicated legislation in Croatia. The fear from land mines is also important factor, because Kopački rit is one of the areas where this problem is still not completely solved due to difficulties regarding clearing caused by swampy terrain and mines in some areas, and dense vegetation.

## **HUNGARY**

We find canoe tours by the organisation of private entrepreneurs and associations of the national park as well in the Danube and Drava sections of the area. These are several days long tours and are organised by the strict principles of the regulations.

Within water tourism only river trips are there as passive pastime activity in the tourism supply of the region. The ship tours start on the Danube from Mohács and on the Drava from Drávaszabolcs. Their time span is usually several hours. Their common feature is that they are oriented directly to the rivers and so their natural values.

The conditions for cycling are practically not adequate enough in the area, since there are no cycling routes (except for the cycling routes marked inside the bigger settlements, towns of the micro regions) and adequate information points, however, the “Three rivers cycling route” touches the region as well. The tour routes of numerous cycling associations concern the area due to the cultural and natural values’ attractions. It is univocal that the demand side is much bigger than the supply and services in this respect.

The equestrian services presently are only in their formation phase. The number of qualified service providers is extremely low due to which its position on the supply side far lags behind the optimal.

A certain part of the region’s fishing waters are natural shaped by the rivers (characteristically River Drava). The others are artificial, bloated by the local streams. The fish ponds are in the ownership of fishing associations and private corporations. The fishing on River Danube and Drava belongs directly to the County Clubs of the Angling Associations.

The basis for hunting is provided by the southern areas’ game reserve established by Count Iván Draskovich. The once populated game population for instance presents such an outstanding genetic substance that to this day the deer population is considered to be an outstanding European game population.

The Gemenc area along the Danube also present an internationally known hunting region. In the area there are numerous regional hunting associations functioning which receive hired hunters and guest hunters as well. We also have to mention the game management of the national park where hired hunting is provided in the complete season assuring the balance of the game population.

## **SERBIA**

Cycling route “Pannonian way of peace” in the length of 80 km connects the cities of Osijek (Croatia) and Sombor (Vojvodina - Serbia). The route passes through the best preserved natural areas in the Middle Danube, Kopački Rit Nature Park and the Special Nature Reserve, Upper Danube, linking the multinational local population which still has a rich traditional heritage. On the route you can enjoy the culinary delicacies, handicrafts, cultural - historical monuments, boating, horse carts and photo safari. In the territory of the Municipality of Apatin there is bike path length of 42 km is marked with tourist signs, 34 miles is asphalt way and 8 km is a dirt way.

Forest management “Vojvodinašume” is responsible for managing in the Serbian part of Pilot project in Apatin municipality and also for organizing hunting and fishing for local and foreign

tourist. Hunters can use a number of hunting with the next game: deer, roe deer, wild boar, and love and pheasant, quail, geese, ducks, rabbits, foxes and jackals. There is also a professional hunting guide and accommodation at the hunting lodge. As for hunting, there are also numerous places for fishing in the project area such as: „Harčlaš“, „Kod Rumuna“, „Lavač“, „Staklara“, „Ribarska centrala“ и „Kula“, canals: „Kupusinski dunavac“ and old way of Danube called „Kučka“, all in Apatin municipality and „Baste“, „Duga bara“, „Štale“ fishing places, canals Bajski kanal, Veliki bački kanal - Kišov kanal, Kanal Dunav-Tisa-Dunav, Čonoplja, Kidoš – Plazović river and pond Mrtva Baračka in Sombor municipality.

### *3.1.2.3. Health tourism*

#### **CROATIA**

Health tourism is not developed in the study area, but it is in the close surroundings in Bizovac spa as the only in the whole Eastern Croatia. Bizovac is one of the newest spas in Croatia, because thermal water was found there in 1967 during the oil drilling with the first pool built in 1974, and the hotel in 1990. It is located twenty kilometres west from Osijek or less than 10 kilometres from the study area. Therefore it is sometimes used as additional accommodation for tourists visiting Osijek and attractions around Osijek. There is a recreational centre with pool in Kneževi Vinogradi, but not based on thermal water and predominantly locally used.

There are some wellness establishments in regular hotels in the area, especially in hotel “Osijek” as the most luxurious in the whole Eastern Croatia. The problem is basic orientation of Croatian spas towards local patients and therefore the equipment is not adapted to the expectation of recreational tourists that is also a case in Bizovac, although there are some entertainment facilities with aquagans (“Aquapolis”). Therefore many Croatians from the area sometimes use spas in Hungary for recreational reasons. Regarding bathing it has to be mentioned that Drava river is clean enough, so the most popular bathing spot in the whole area is “Copacabana” on the left bank of Drava river in Osijek, abundant with various recreational and entertainment facilities.

#### **HUNGARY**

At present there are four spas in the area with a significant difference of quality and services structure.

Harkány – although its positions were more or less decreasing recently compared to the earlier turnover – is the leading actor of health tourism with an international presence and familiarity as well. In its supply besides the wide range of curative services the wellness elements play an increasing part which is the result of a conscious development with which they wish to aim new market segments.

The spa in Bóly is only seasonally functioning in the summertime period. The services mean only local attractions, so it mainly aims the population of the town and the nearby settlements. The spa possesses no curative neither wellness services.

The medicinal spa and bath in Dávid belongs to the nationally important ones. Its water is officially pronounced curative but the complete services based on this opportunity have not been established yet.

The water of the spa in Nagybaracska is also qualified as curative or medicinal, but its establishment is modest so it only satisfies regional demand.

#### **SERBIA**

The Pilot Project area in Serbia has natural resources with potential for the development of spa and wellness tourism. This area could be characterized by developed spa tourism. In analyzing the content may seem attractive, the market required, the offer of wellness services, it is necessary to mention that there is famous spa Junaković in this area. They will be particularly important when

they offer differentiated and physical separated facilities for patients in treatment and offer to tourists. In this area here is Bezdán spa and Leveš spa, which is not opened now.

#### *3.1.2.4. Cultural tourism*

### **CROATIA**

As mentioned before, the conditions for the development of cultural tourism are very good thanks to abundance of cultural monuments, rich traditions and many festivities. The special interests include:

- numerous religious objects of various religious monuments including important pilgrimage sites such as Aljmaš , with remark that besides predominant roman catholic churches like Osijek cathedral and the church of Sainte Peter and Paul in Topolje there are also examples of attractive protestant church (in Kneževi Vinogradi and Lug) and orthodox churches (in Dalj);
- rich architectural heritage with many castles & manors, (Bilje, Tikveš, Retfala, Tenja), fortresses (Erdut) and Osijek's Tvrđa as most important built heritage attraction;
- recent history, both from the Second world war (Batina) and Croatia War for independence
- rich ethnographic heritage and folklore traditions
- various type of manifestations – religious, cultural, art, ethnographic, modern music, sports etc.

It is important to mention that potential cultural tours include also the neighbouring areas with very attractive spots. In the case with the religiously motivated tours it is Đakovo with the famous Cathedral, the largest in Slavonia and Našice and Vukovar with large Franciscan monasteries. Built heritage include attractive castles in Donji Miholjac, Valpovo, Našice, Vukovar and Ilok, and recent history the town of Vukovar known for the biggest battle in Europe after Second World War.

The actual promotion of cultural tourism in the area is insufficient, especially on foreign market. Cross border co-operation can definitely enhance this type of tourism due to abundance of attractive cultural monuments in neighbouring areas in Hungary and Serbia.

### **HUNGARY**

There are numerous religious monuments, ethnographical collection, museum and exhibition places in the area but their touristic importance can not be compared to the other tourism products. The greater towns' sights can be considered more significant: the Siklós Castle or the city centre of Baja and Mohács but they have only regional reach of attraction. We can also highlight the exhibition places of the national park or some folklore buildings such as the "foot houses" (talpasház) from the Ormánság which is exhibited in Harkány.

Oriented to the recent tourism trends, within cultural tourism we can highlight the cultural events. The visitors are welcomed by numerous program or series of programs out of which we can accentuate three most important ones: the Busójárás in Mohács – which is a UNESCO Cultural World Heritage since 2009 – which is an internationally known and visited event; The Chowder Cooking Festival in Baja which is one of the most well known gastronomy event in Hungary; and the Spa Festival in Harkány which is organised for nearly 20 years providing one of the top programs of the summer season in the Siklósi Micro Region.

### **SERBIA**

A special part of the cultural infrastructure is that 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 types of museums,

galleries and theaters are typical for Sombor municipality, while in smaller places the function of organizing cultural activities has cultural centers. In the city of Sombor there are monuments of high importance (it could be seen in the table that follows), while in Apatin municipality there are no monuments of culture of high importance. Events are important part of cultural heritage. In the Pilot project area there are 55 events, from which 48 events taking place in Sombor municipality and 7 in Apatin municipality.

#### *3.1.2.5 Other tourism products*

### **CROATIA**

Probably the biggest potential in the area lie in the better usage of big Pannonian rivers Danube and Drava both as one of the last big European rivers in natural condition and for various water activities. That especially concerns river cruising, at the moment only occasionally present in Osijek, but potentially very promising in Batina, Aljmaš and eventually also Dalj as Danube ports. Besides river cruising, there are possibilities for rafting and kayaking, “Robinson” tourism on isolated river islands etc.

### **HUNGARY**

Taking into consideration the other tourism product we definitely should highlight wine tourism since the researched areas touches upon 4 wine districts: the Villányi, the Pécs, the Szekszárdi and the Hajós-Bajai wine districts. Based on their significance it seems to be the most profitable tourism product. Hungary’s first – and well functioning – wine route – the Villány-Siklós wine route – was established in 1997 which has an international significance as well. The wine tourism services of the area are well established and also a complete range of complementary products and gastronomy are to be found as well.

## **3.2. The conditions of guest catering**

### *3.2.1. Accommodations*

### **CROATIA**

In comparison with the coastal Croatia the tourism offer in the study area is small, but it is relatively rich in comparison with the rest of continental Croatia. There are many hotels of one to high quality four star and various kind of offer in apartments and rooms for rent. The biggest problem is strong concentration in the town of Osijek, especially the hotel accommodation and inexistence of camp sites as important type of accommodation for nature oriented tourists. That is completely different from the coastal areas of Croatia oriented much more on complementary accommodation such as bed & breakfast and abundant with camp sites. It has to be mentioned that the offer seriously improved in the last five years with many new hotels built and more accommodation offered in rented rooms and apartments, including rural households.

In the whole area there were total 1.305 beds in 2009, from which 991 were in Osijek (75,9%), 196 in Bilje municipality (15,0%) and only 118 or 9,0% in the remaining three municipalities of Draž, Kneževi Vinogradi and Erdut. The majority of beds were in hotels and pensions (total 836 or 64,1%), 443 or 33,9% in various forms of bed & breakfast accommodation and the remaining 26 or 2,0% in hunting lodges. From total 9 hotels, all located in Osijek, 3 were four star with 119 beds, 4 were three star with 307 beds, and 2 were two star with 306 beds. From two pensions one is also in Osijek with 24 beds and one in Suza in Kneževi Vinogradi municipality with 18 beds as the only hotel type of accommodation outside Osijek.



The majority of accommodation capacities in all four municipalities were beds in rooms and apartments. From total 443 beds in additional types of accommodation 90 refer to total 17 registered rural households in the study area. There are two hunting lodges in the area, one in Zmajevac in Kneževi Vinogradi municipality and one in Zlatna Greda in Bilje municipality and Kopački rit nature park, the first one with 8 and the second with 18 beds. It can be assumed that there are additional unregistered accommodation capacities in rented rooms, especially in the town of Osijek.

## **HUNGARY**

Among the accommodations of the region the private accommodations are dominating. This is mainly due to the role of Harkány since as a traditional spa town a complete range of services was created dealing with accommodations as well. Rural or village accommodations are characteristic in the smaller villages where the local population deals with it as a part time job.

Among the commercial accommodations the role of the hotels is outstanding which accommodation type is to be connected with the accentuated tourism settlements (Villány, Harkány) and the towns (Mohács, Siklós, Baja).

Taking into consideration the capacity of the accommodation types the situation is getting more modulated, but here as well the private accommodations are dominating. We also have to stress that the services of the commercial accommodations are very important. Taking into consideration the absolute number of beds the so called paying hospitality, the hotels and the campings are providing 80% of the total supply. The remaining accommodation types have no accentuated importance.

The most important part of the analysed area is the Siklósi Micro Region where the higher ranked and quality accommodations are to be found, while there are only a few of these in the other two micro regions. However from the point of view of tourism developments the endowments of these micro regions project the formation of higher quality accommodations.

## **SERBIA**

In the Pilot project area there are, according to available data, 1,065 beds in various accommodation facilities (182 beds in hotels, 3 in tourist apartments, 148 in pensions, 164 in B&B, 521 in complementary capacities and 47 beds in other accommodation facilities).

### *3.2.2. Guest catering, commercial supply*

## **CROATIA**

There are more than 60 restaurants and similar objects serving food in the study area, the majority of them concentrated in Osijek. Apart from Osijek there about 15 restaurants and inns in the rural municipalities. The offer is much better in Bilje and Kneževi Vinogradi municipality with more than 10 restaurants and inns, and weaker in Draž and Erdut municipality. The restaurants are located not only in municipality centres, but also in smaller villages like Kopačevo, Vardarac, Tikveš, Karanac and Suza). Some food is also offered in wine cellars, especially in Kneževi Vinogradi municipality.

Osijek has relatively satisfactory night life for the town of such size, with many pubs, bars etc. Especially popular area is the central part of the town near the main square and Winter port. Osijek is also well equipped with all types of shops and other services. Due to the proximity of Osijek, four rural municipalities are not abundant with shops and services except for the basic needs. It has to be mentioned also that Beli Manastir as the only town in Croatian Baranya is close to Kneževi Vinogradi, so the inhabitants of Kneževi Vinogradi and Draž municipality as well as tourists are partly oriented to Beli Manastir as local centre. Among municipality centres slightly better situation with shops and services is in Dalj as relatively large settlement distant from Osijek.

## **HUNGARY**

The supply of the areas' guest catering places and commercial units is rather heterogeneous. All in all it can be considered as satisfying the needs, but they are not optimal. The division of the service places reflects the settlement hierarchy and the tourism role as well. Due to this the number of service providers will be higher in the towns and the greater settlements and where tourism has an accentuated role and will be much fewer in the smaller villages. Of course the basically needed commercial store network is adequate enough, but the specialised shops are concentrated in the upper mentioned more important settlements. The following settlements have an accentuated role in this respect: Mohács, Siklós, Harkány, Villány and Baja.

## **SERBIA**

In the Pilot project area there are:

- 40 restaurants (21 in Sombor municipality and 19 in Apatin municipality)
- 28 bars (13 café bars in Sombor municipality and 10 café bars and 5 sport betting in Apatin municipality)

### *3.2.3. Special tourism infrastructure, tools and equipments*

## **CROATIA**

In the study tour area there are two cycling routes: Pannonian Peace Trail (Batina-Osijek-Sombor) and Danubian route (HU-CRO-SRB). There are three educational/study trails in the study area: Sakadaš (boat ride through Kopački rit); Old Elm (Tikveš) and Educational Adventure Path (Zlatna Greda). Equipment includes bicycles, canoes, boats and photo-safari equipment.

## **HUNGARY**

The establishment of the special tourism infrastructure is low. Cycling routes are decisively belong only to certain settlements, there are no routes connecting the nearby areas. In some cases former agricultural land routes and public roads are signed for cycling traffic as well.

Similar is the situation in the case of equestrian routes. We do not find such specifically functioned routes in the area, but the agricultural roads, dirt roads and forest roads are convenient to the utilisation of equestrian tourism as well.

The study trails of the region are connected to the areas of the Danube-Drava National Park within which the core areas of the park and its nature protection districts.

## **SERBIA**

Pannonian way of peace Via Pacis Pannoniae - Cycling route Osijek - Sombor – Cycling route “Pannonian way of peace” in the length of 80 km connects the cities of Osijek (Croatia) and Sombor (Vojvodina - Serbia). The route passes through the best preserved natural areas in the Middle Danube, Kopacki Rit Nature Park and the Special Nature Reserve “Gornje Podunavlje” and linking local multinational population, which still has a rich traditional heritage. On the route people can enjoy the culinary delicacies, handicrafts, cultural - historical monuments, boating, horse carts and photo safari...

In Osijek, the bicycle route begins on the right side, just before the bridge over the river Drava and in Sombor the starting point is at the monument of St. Florian, in Batinska street.

Route “Pannonian way of peace Osijek – Sombor” was established under the Project of cross-border cooperation and reconciliation Osijek – Sombor, which is financially supported by CRS and USAID. The idea of developing a network of bicycle routes in the Pannonian region of Croatia, Serbia and Hungary - Pannonian paths of peace / Via Pacis Pannoniae launched a Green Network of Vojvodina and the Green Osijek 2004th year. The aim of Pannonian road of peace is to connect people, preservation of natural and cultural values and long-term sustainable development of the Danube. Cycling route Pannonian time of peace Osijek - Sombor is the third cross-border routes peace in the world.

### *3.2.4. Settlement façade, public services*

## **CROATIA**

In the study area there is brown touristic signs in most of the places, bicycle trails signs and the educational boards on all the educational/study trails. The most attractive tourist spots are equipped by the toilets. In larger villages there are grocery shops and cash machines. In most villages there are the street lights.

## **HUNGARY**

The sources of the LEADER program was utilised by numerous settlements of the analysed region and so created a settlement façade. All in all we can state that the quality and quantity of the technological infrastructure can be accepted, but at some cases the quality of roads is critical, mainly in the cross borderer, very small settlements.

The accessibility of the area is provided by public roads, in some settlements occasionally the train connection as well but its quality is outstandingly low. The financial services can be accessible in the greater settlements (branch banks, ATMs), which is of course natural since taking into consideration their settling factors the presence of the supply is decisive.

The tourist signs (e.g. the adverts of service suppliers, tables) are usually found in the settlements, but their standards are rather inconstant. They are usually established in the greater towns of the micro region with tourism importance and characteristically in the Villány-Siklós wine route area.

## **SERBIA**

Since 2006 City of Sombor has tourist signs. In the territory of Apatin municipality, there are eight modern gas stations, of which four are in Apatin. Gas station located at the marina is the first in this region, where the petroleum products sold at the floating pontoon on the water-which is, top standard for nautical tourism. All existing gas stations are modern and they are designed to the highest European standards. In Apatin marina are located outboard service shops and nautical equipment. For the needs of tourists and citizens there are three services for cars, a lot of mechanic shops and wash for cars and trucks. Apatin has a modern home comfort and health, and a large number of pharmacies and dental offices, which is very important for the tourism industry. Public

institutions are: Municipal Court, police station, fire department and post office. There is also 16 banks and 5 exchange offices.

Facilities for nautical tourism in the international marina Apatin, which has 400 berths on the water and "dry boat" area of 2.500m<sup>2</sup>, restaurant with terrace, a diving club, 8 studio apartments and shops for food and space for drying and washing machine, two toilets with showers. In the marina is, as its trademark, placed a large bronze statue of the goddess Nike with St. Andrew's cross in one hand. Height of the sculpture is 8.5 feet.

Also, on the banks of the Danube, nearby the country taverns "Golden Crown" was built in the international pier for cruise ships- cruisers, from floating concrete and 2 dolphin floating cleats tracks for passengers dimensions 50x 4m built of lightweight concrete. Berth is in the function from June 2010. years and accept a 12 passenger ships and 20 other craft objects. Throughout the entire territory of the Municipality of Apatin the street lighting was implemented, except that the center of town and walking along the Danube in particular, further illuminated with decorative candelabras.

### *3.2.5. Human resources*

#### **CROATIA**

Local population in the study area is engaged in the rural tourism for a number of years and their experience in the sector can be evaluated as quite good. The most used foreign languages are English and Hungarian, as the dominant minority language. Since the entrepreneurial activity in the segment of rural tourism is based upon the market opportunity, tourist qualification did not play the dominant role in its development. There is no special educational institutions for the rural tourism management except for the high school in Osijek for low qualification jobs (waiters, cooks).

#### **HUNGARY**

From the point of view of human resources the area can be considered advantageous since it can be found between two great university cities – Pécs and Szeged – so the qualified labour force supply is present and solved. The qualification and competences of the local population change depending on the hierarchy of the settlements: implicitly in the greater settlements the population is better qualified than in the very small cross border villages. It is characteristic to the entrepreneur intention that the enterprises are mainly small and medium sized which occupy some employers up to a maximum of 50.

#### **SERBIA**

Data's from Sombor municipality for human resources are not available. In Apatin number of employees in tourism is 385 persons. Besides them, there are a large number of unemployed graduate's tourism managers, manager for hunting, tourism technicians, etc. Tourist resort has three licensed tourist guides. Employed in tourism, and professional staff have a solid knowledge of English, German, Hungarian, Italian.

### *3.2.6. Spatial and local tourism organisations and relations, connections*

#### **CROATIA**

The area in concern is under the jurisdiction of Osijek-Baranya regional tourism organization responsible for the tourism in the whole Osijek-Baranya county. There is also Osijek town tourism organization with two allocated tourist information centres in Tvrđa and Gornji Grad. There are municipal tourist organizations in Erdut (located in Aljmaš), in Bilje as municipality where there is majority of Kopački rit nature park and in the municipality of Draž. In Zmajevac in Kneževi Vinogradi municipality there is tourist information centre of Baranya area tourist organization

meaning that all four municipalities are also covered with local tourism organizations. In the situation of inexistence of proper tourism destination management organizations they function as entities responsible for the tourism organization in the areas of all local administrative units.

Kopački rit nature park as public organization also has a sector responsible of tourism, which is co-operating with the local tourism organization in Bilje municipality as its most important attraction. As mentioned before three municipalities in Baranya are also under responsibility of Baranya tourism organization and since Baranya is also very clear microregion with the centre in Beli Manastir they function also as a part of Baranya as territorial cluster. In the same way the municipality of Erdut is more closely connected with the town of Osijek as a part of Osijek microregion.

## **HUNGARY**

There are two important co-operations in the area with a significant regimen of tourism, the Danube-Drava National Park which functions is of course mainly deriving from nature protection with an inevitable role for tourism and also the Villány-Siklós wine route.

Further on the creation of the South Transdanubian Village Tourism Cluster is under way which is inspired to strengthen the positions of village or rural guest catering. The Tourism Destination Organisations can be established in Baja, Mohács and Harkány based on the already existing tourism supply.

In the last two decades after the change of the regime numerous cross border cooperations and agreements were born, but in practice these were not realised, that is why we consider them only formal. At present there is no such international cooperation in the field of tourism which would significantly effect the tourism of the analysed region.

On the other hand the possible potential is significant since both in the cases of ecotourism and water tourism a well functioning partnership would benefit with favourable advantages.

## **SERBIA**

Municipalities Sombor and Apatin belong to cluster of Vojvodina. They are classified as a tourist destination "Gornje Podunavlje. Both municipalities have completed development plan, master plan in the final stage, performed by Tourism Development Strategy until 2015. That is consistent with the Tourism Development Strategy of Serbia, Vojvodina. Tourist organization Apatin exists over 45 years and works closely with the Tourist Organization of Vojvodina and Serbia, such as Tourist organization of the City of Sombor.

There are cluster organization and NGO's, which are actively involved in creating and development of tourism offer. In the City of Sombor there are cluster organization: "Klaster umetničkih zanata" and "Salaši Sombor" and NGO's: "Staparke", "Zlatne ruke-Somborke", "Duga", Udruženje građana "Bunjevačko kolo" and "Brežanke"

### *3.2.7. Marketing*

## **CROATIA**

Marketing in tourism is organized through local, regional and National tourism organization each responsible for the territory in concern. All of them except have web pages and there are also web pages of particular municipalities and of Kopački rit nature park. Other natural protected areas are covered with a special web page of Public Institution for the Management of Protected Natural Areas in Osijek Baranya county and there is also special Web site of Natura 2000 Croatia.

## **HUNGARY**

The area does not have a uniform marketing activity, the certain areas' or settlements' promotional activity can be divided into two types. The first is the spatial marketing which is utilised by the settlements with an importance of tourism (e.g. Villány, Harkány etc.), and the second is the

marketing activity of certain events and festivals which are realised in the highlighted events (e.g. Busójárás in Mohács, Chowder Cooking Festival in Baja etc.).

Of course the accommodations of the micro regions appear on the adequate digital and traditional advertisements, but decisively independently and not as part of a spatial or regional advertisement campaign. However, the service suppliers and settlements of the Villány-Siklós Wine District is an exception which' connectedness to wine tourism induced a common appearance.

The settlements of the micro regions appear on the Internet but the quality and information are differing in a wide scale and range mainly depending on the financial potential.

## **SERBIA**

For tourism marketing and promotion are in charge Tourism organization of Apatin and Tourism organization of the City of Sombor. Promotion of tourism of the Municipality of Apatin is related to participation in national and international tourism fairs, the issuance of tourist brochures, advertising in tourism newspapers, electronic media, creating a Web site and through cooperation and coordinated work with regional and national tourist organization.Изгровор

Tourism organization of the City of Sombor is also involved in publishing of brochures and other promotional material, which will be distributed on national and international tourism fair.

## **3.3. The demand of tourism**

### *3.3.1. Guest flow*

## **CROATIA**

As well as accommodation offer, the number of tourists and overnights in the study area is small in comparison with the coastal Croatia, but relatively big in comparison with the rest of continental Croatia. The difference between Osijek and the rest of the area is even bigger, because due to prevalence of hotel accommodation and orientation to business tourism the capacities are much better utilized in Osijek than in rural areas with accommodation offer mainly in rented rooms and apartments. Therefore the average usage of accommodation capacities in Osijek was 97 days and in Draž municipality 49 days, in Bilje municipality 36 days, in Kneževi Vinogradi municipality 28 days and in Erdut municipality only 15 days.

The number of tourists in the whole area in 2009 was 47.352 and the number of overnights 106.377, meaning that the average length of stay was only 2,2 days. From those 43.052 or 90,9 percent of tourists and 96.209 or 90,4 per cent of overnights refer to Osijek. 2.672 tourists and 6.975 overnights (5,6 – 6,6 per cent) refer to Bilje municipality and only 1.628 tourists and 3.193 overnights or about 3 per cent to the remaining three municipalities of Draž, Kneževi Vinogradi and Erdut. It is interesting that the average length of stay (3,7 days) and the utilization of accommodation capacities except Osijek (49 days) is in northernmost Draž municipality and the lowest (1,3 average length of stay and only 15 days usage throughout the year) was in southernmost Erdut municipality.

Regarding markets, there is a difference between the town of Osijek as major destination and the remaining rural areas. From total 96.209 overnights in 2009, 68.156 or 70,8% were made by Croatians, 4.249 or 4,4% by Germans, 2.171 or 2,3% by tourists from Bosnia and Herzegovina, 1.949 by Austrians, 1.964 by Italians (both 2,0%), 1.653 or 1,7% by Serbians and only 963 or 1,0% by Hungarians. In the remaining four municipalities of Bilje, Kneževi Vinogradi, Draž and Erdut there is significantly higher share of Croatians and especially Hungarians: from total 10.168 overnights in 7.654 or 75,3% were made by Croatians, on the second place were Hungarians with 392 and on third place Germans with 391 overnights (both 3,9%), 302 or were made 3,0% by tourists from Bosnia and Herzegovina, 311 by Austrians (3,1%) ,195 by Serbians, 193 by Italians (both 1,9%) etc. Such structure is a result of higher interest of domestic population in rural tourism,

and in the case of Hungarians probably also visiting neighbouring areas where local hosts speak Hungarian language.

The growing importance of tourism is clearly visible considering its continuous growth during the last five years in spite of World crisis. The growth is especially visible in Osijek as the main centre, which was almost untouched with the crisis. Very interesting element is the appearance of the municipality of Draž on the tourism market as new destination and come back of Aljmaš as a tourism destination in 2008. The crisis was more visible in Bilje and partially Kneževi Vinogradi municipality, but even there the results in 2009 were much better than in the year 2005. Important factor was probably also better registration of tourism flows, especially in the complementary forms of accommodation.

## **HUNGARY**

The guest flow of the region can be considered as quite extreme since the majority of the tourists are concentrated in the Siklósi Micro Region. Within the micro region they can be mainly connected to Harkány, Villány and Siklós. The other two micro regions together have 20 000 persons guest flow. The asymmetry of the demand is caused by the supply and its extremes since on the one hand there is the traditional, internationally well known spa and wine district, while on the other hand we can find maybe nationally known products which are in the focus of special market segments. The guests arriving to the area prefer hotels, paying hospitality and pensions, so the higher quality accommodations due to which the expenditures are higher. This tendency is adequate to all the three micro regions completed with other forms as well.

Considering the guest nights of the demand we have a very similar picture. The majority of the guest nights are realised in the Siklósi Micro Region in the higher category accommodations. The other two micro regions possess only a fragment of the guest nights and so the income as well. It is interesting that taking into consideration the complete region the guest nights connected to paying hospitality (private accommodations) anticipate the values of the hotels, which can be interpreted with the fact that Harkány and its surroundings has a great number of private accommodation providers.

## **SERBIA**

Tourism in the region has 0, 98 % of spent nights of the whole country and 0, 96% of tourist arrivals. Data show that the area of the project is economically less developed as a tourist destination, concerning its potentials. The data define the region as with a relatively low "pressure" on the environment and socio-economic impact of tourism. Analyses of tourism flow for the Serbian part of Pilot project is based on official data's of the Statistical office of the Republic of Serbia, as by data's of tourism organizations of Apatin and Sombor. In this segment are analysed data's for the last 6 years- but only basic data's which are concerning guest flow and spent tourist nights. For comparison with developments in the wider tourism economy of space was performed to compare with trends in the level of Serbia and Vojvodina, and the results and analysis presented in the following tables and charts.

The analyzed data presented in tables and graphs below show the following results:

- The most receptive market for both domestic and foreign tourists are Spa Junaković and cities Sombor and Apatin.

-Also there is a need to strengthen shares of arrivals and overnight stays in this region, which should also affect the additional content and creating an adequate concept of tourism and tourism products, extend the average length of stay, whether any foreign national who shows that the tourists hold an average of 2-6 days.

### **3.4. Target areas of tourism, local destinations**

#### *3.4.1. Tourism core areas (centre-periphery)*

##### **CROATIA**

As stated before, there are two core areas for tourism – one is the town of Osijek as the central area and typical business and cultural tourism destination and the second is Kopački rit nature park. This area is predominantly oriented to nature based forms of tourism and located more precisely in the localities Kopačevo, Lug, Tikveš and Zlatna Greda, as well as Bilje and all in Bilje municipality. The area of municipalities Kneževi Vinogradi and Draž can be seen as one destination, since all the important settlements are located on one line – from Karanac over Kneževi Vinogradi, Suza and Zmajevac in Kneževi Vinogradi municipality to Batina as the most important tourist locality in Draž municipality. This area is more oriented towards wine and food motivated rural tourism.

Erdut municipality is temporarily in tourism terms less developed separate entity offering different forms of tourism from nature based wine tourism in attractive Erdut vineyards to cultural tourism in Dalj and religious tourism in Aljmaš. Municipal borders can be seen also as borders of tourism centre and periphery with the town of Osijek being central zone, Kopački rit zone close to the centre and two peripheral tourism zones around vineyards in Baranya and Erdut hills.

##### **HUNGARY**

Within the area we can impound several central areas of core areas from the point of view of tourism:

The determining majority of the tourism of the complete area is provided by the Harkány-Villány-Siklós area. Its role is not only regional and national but international as well. The characteristic tourism products are health tourism and wine tourism.

We can distinguish as a forming area with the centre of Mohács, the narrow region of the Danube in the Baranya section. The characteristic tourism products are: water tourism, cultural tourism and gastro tourism or gastronomy.

Another are under formation in terms of tourism is Baja and its surroundings, which covers the regions connected to the Danube in Bács-Kiskun County. The characteristic tourism products are: water tourism, cultural tourism and gastro tourism or gastronomy.

We also have to take into consideration that the protected areas of the Danube-Drava National Park are practically considered to be tourism core areas as well but not because of the tourism guest flow but due to the turnover of visitors.

##### **SERBIA**

The City of Sombor is not tourist center.

Target areas of tourism in The municipality of Apatin:

Nautical tourism (international passenger pier, marina, sailing club, diving club),

Cycle tourism (bicycle paths, bike club "As"),

Hunting and fishing (Special Nature Reserve "Gornje Podunavlje," ŠG "Vojvodinasume D.O.O. " Pagos" USR "Bucov"),

Health and eco-tourism (Special Hospital "Junakovic", Tourist Park of Nature "Zelena glava ") and  
Camping tourism (Camp "Budžak").

Tourist zones in Apatin area

Apatin is located in the Danubian tourist zone, as one segment of the territory of Western Bačka district, which extends from Sombor to Backa Palanka and covering the municipality of Sombor, Apatin Odžaci and Bač. According to administrative criteria, an area covers 2.288km<sup>2</sup> and has 39 villages with 195,292 inhabitants. The attractive group of natural factors of Danube zone consists of the following selected elements:



A) Bezdansko- apatinska water area with a series of open and closed waters important for the tourist exploitation (the main stream of the Danube and its backwaters such as: “Zimovnik”, “Mišvald”, “Lavač”, “Stari Dunav”, “Srebrenica”, mesh sleeves and a bar that is sheltered waters “Kupusinski Dunavac”, “Kučka” and “Ciganski Dunavac ” and also mineral water springs).

B) Alluvial plain of the Danube from Bezdán to Novi Sad

C) Animal World.

Attractive group of selected social factors in the Danubian tourist zone consists of a collection of the Archaeological Department of the City Museum in Sombor, in Bač fortress, monastery Bođani, the Franciscan monastery in Bač, Gallery “Milan Konjović” in Sombor, and a series of attractive events (, Fishing nights in Apatin”, and “Tourist week in Bezdán,,).

### **3.5. Spatial actors, partnership, participants**

#### *3.5.1. Identification of the regional participants who are concerned in participation (participant map)*

##### **CROATIA**

Besides the county tourist board and the tourist boards at the town level, some local municipalities have their own tourist boards engaged in tourism promotion, support and development .

##### **HUNGARY**

The ones concerned in regional development and tourism development in the area are the local governments since they have a governing function on the settlements and also coordinate the possible investments. The tourism service providers and the other service providers play an outstanding role as their role is directly or indirectly connected to tourism. The local and regional non-profit organisations and those groups of the local population who can directly be connected to tourism will be concerned only indirectly but due to a possible successful tourism development they can become active players as well.

##### **SERBIA**

Stakeholders in Sombor are all interested persons who work in cooperation with Tourist organization of the City of Sombor can make a profit: restaurants, accommodation facilities, event organizers, cultural institutions, local residents.

Concerning Apatin territory stakeholders are: Special Hospital “Junaković”, Tourist Park of Nature “Zelena glava”, ŠG “Vojvodinašume”, JKP “Naš dom- Marina and international passenger pier, an associations of citizens: “Bucov”, “Fazan”, “Jastreb”, “Orao”, old crafts "Zlatne ruke"), catering entrepreneurs ("Plava ruža", "Zlatna kruna", "Harčaš"), travel agency “Saputnik M ”, the agency for passenger transport in the water traffic "Sidro", the owners of accommodation facilities ("Vila Duda", "Villa Elena" DOO "Pagos" individuals: Cvetičanin Predrag Mudrinić Zeljko, Zeljko Tintor, Ajduković Mira, Varga Verona ("Maryland"), Duško Lavrnić) and provider "Multimedia net".

#### *3.5.2. Local governmental ideas*

##### **CROATIA**

Spatial plans of local municipalities as well as their programs of development emphasize the tourism development at the local level.

##### **HUNGARY**

The local governments mean naturally an organic part of the regional development of the area so they are outstandingly interested and concerned in tourism development as well. They mean the basics – an in an optimal case the economic environment – which is integral to tourism investments. Their major task is the coordination and support of ventures and also the attraction of new investors to the given area. We also have to say that they have a feedback function as well so they have to confine the non developments adequate, which are not compatible with the different development concepts.

## **SERBIA**

Local Government Projects in Apatin are:

- Goods Transport Center (RTC)
- Bank revetment in the length of 500 meters
- Track for rowing on the calm waters and sport fishing
- Marina and international passenger pier
- Wellness Center
- Asphalt bike path the length of 8 km
- The collector for waste water treatment
- Water plant
- The city lights of downtown to the marina Apatin in length of 520 meters.

### *3.5.3. Entrepreneur – civilian development ideas*

## **CROATIA**

Entrepreneurial activity in the sector is quite significant taking into consideration the overall economic situation in eastern Croatia with no or few support for rural tourism development projects. Besides the business sector there is a certain number NGOs engaged in tourism development and rural development in general.

## **HUNGARY**

The ventures as the direct beneficiaries of tourism appear always with profit oriented ideas and development plans on the market, but as a necessity they have to apply the development concepts set out by the certain region. As a consequence of this there is a kind of compromise situation. Of course the majority of the ventures are small and medium sized, which are unable to put pressure on the central development plans, but their role in the region is inevitable.

The non profit and civilian organisations are usually indirectly connected to tourism, so they have a secondary role. But with the boom of tourism they will be strengthened and their role will be valorised, meaning a significant lobby in certain cases or situations.

## **SERBIA**

Entrepreneur Projects

- "Plava ruža" building accommodation capacity of 150 beds in bungalows, tennis courts, basketball court, swimming pool
- "Zelena glava" construction of restaurants, bungalows, windmills, water mills, camping resorts, sports facilities and playgrounds, a mini horse farm, fitness center with spa program, a conference room
- "Hotel Park" building in the city center, 23 double rooms, 6 suites, a total of 60 beds, restaurant with 60 persons, conference hall, spa and wellness in the basement of the hotel.

- Kampiraliste "Budžak" capacity for 21 camp unit and following infrastructure.

#### *3.5.4. The hospitality of the local population and their approach to tourism*

##### **CROATIA**

Hospitality of the local population can be considered as one of the most important advantages in the sector of rural tourism. Experience and recognition of market opportunity in the last decade raised the level of entrepreneurial activity in the sector of rural tourism in the study area.

##### **HUNGARY**

The population and their approach to tourism basically determine and influence the tourism of the given area. We can basically differentiate between positive and negative effects and behavioural forms. The local population can profit from tourism since they can actively be connected to the industry. That is how the entrepreneurial spirit can grow, the resident environment develops, but one can experience negative impacts as well such as environmental pollution, the increase of the prices or the direct conflicts with the tourists.

The approach of the local population to tourism is basically positive in the three micro regions, no such forms of negative behaviours are experienced which would negatively effect the development of any kind of tourism products or development.

##### **SERBIA**

The traditional hospitality of the local population has resulted from long-term engagement in tourism business, which dates from the middle of last century. A positive approach to tourism and hospitality industry is conditioned by the large number of foreign and domestic tourists who come to Apatin for rehabilitation, hunting and fishing or to visit religious buildings - the "Black Madonna". In recent years, many sailors found the interest to use the marina Apatin in the summer for an active vacation, and in the winter months, as winter quarters for yachts. Characteristic of the citizens of Sombor is that the attentive and friendly accept tourists, but they still haven't recognized yet tourism as an activity from which they could realize additional revenue.

### **3.6. Overall statements influencing the development of tourism**

#### *3.6.1. Landscape load, endangering factors and chargeability*

##### **CROATIA**

As for the urban and rural configuration of the pilot project area, there have not been any significant changes in terms of landscape destruction/change for the last 30 years. The City of Osijek is the largest urban area in this part of Croatia and it has seen no enlargement in the last 20 years. On the other side, rural areas are becoming more and more depopulated which entails the deterioration of the rural infrastructure and architecture. Beside the natural endangering factors, floods mainly, human activities can be seen as the main source of influence to the landscape in terms of production facilities/processing plants taking into consideration presence of one of the largest agrokominats in the county within the pilot project area. According to the spatial plans, all entrepreneurial activities are/should be concentrated in the business zones existing in each local municipality of the study area.

##### **HUNGARY**

The present and future landscape charging is not problematic. One of the reason for this is the related, strict Hungarian environment and landscape protection laws, based on which on the related areas the Danube-Drava National Park is functioning by severe instructions. The park consequently observes the regulations without any exception. The relatively low tourism flow of the area – with the exception of the Harkány-Villány-Siklós area – also strengthens the moderate environmental charge. Further on in the future presumably the tourism development of the region will not generate a significant demand increase, so the present moderate charge will not become a problem in the future.

##### **SERBIA**

Landscape requalification in the area is not significant. Due to the rather slow development tendencies in last decades, there was no significant pressure on the cultural and natural landscape. Some informal construction occurred during nineties as the consequence of the sudden influx of refugees and internally displaced people. Those activities resulted in creation of urban sprawling along the main transport corridors. However this tendency had small scale impact on the landscape structures.

#### *3.6.2. Conflict areas*

##### **CROATIA**

In the study area tourism is not seen as an activity that can endanger the environment, because it is still on very low scale and is seen as a more favourable option than many other activities, especially polluting industry. The jobs in tourism are in the area generally much more desirable than in the other parts of Croatia due to lack of jobs in general and better perception of jobs in tourism than in agriculture. Eventual threat can exist only in exceptionally sensitive areas such as Kopački rit nature park. But at the moment more serious threat in Kopački rit and similar areas are conflicts with other activities like forestry or hunting tourism opposed to other forms of tourism.

Positive influences of tourism are very clearly seen through the support from tourism stake holders in favour of future Regional park Mura – Drava - Danube, as well in favour of eventual establishment of National park inside the Kopački rit nature park. Namely, the main opposition to

the establishment of new protected areas or more strict protection<sup>6</sup> comes from other activities such as water management, forestry or hunting associations. The co-operation between Croatia and the neighbouring countries in Danube area opens good prospective for the future, because the establishment of proposed Mura-Drava-Danube World Biosphere can both help tourism development and enhance nature protection in the all cross border area.

New entrants to the sector of tourism need to meet demanding requirements in terms of technical standards and human resource capacities. Very important obstacle to further development is also long administrative procedure in starting the businesses and complicated legal framework for running the businesses in tourism branch. Croatia's European Union joining process can help in order to improve those elements.

## **HUNGARY**

From the point of view of tourism, the area is concerned by two important conflict areas:

The first is the touristic utilisation of the areas of the Danube-Drava National Park connected to the related strict nature and environment protection laws. Since the priority is of course the state of the natural environment its tourism utilisation is restricted due to which the functioning of tourism can not considered to be on an optimal level.

The other conflict area is that due to the lack of infrastructural investments on the most peripheric areas of the region tourism is unable to develop as its endowments would predestinate. It is very hard to change this situation since the costs of the necessary investments would far more exceed the budget of the local governments of the micro regions' concerned areas.

## **SERBIA**

There are no significant conflicting relations in the scope of tourism in the area. However, there is passionate debate undergoing on the way how the protection of the nature should be handled. This is especially related to the forests. Extremely low percent of areas covered by some type of forest in Vojvodina is requiring reforestation of large scales and severe protection of existing forests. The debate is going around the question how to protect and extend existing environments of biodiversity on and ensure the economical rationality.

### *3.6.3. The conditions and possibilities of sustainable environment friendly tourism, suggestion to the impoundment of tourism zones*

## **CROATIA**

The main attraction and the basis for sustainable tourism development within the study area and wider, represents the protected and well preserved nature and Kopački rit, a nature park. Possibilities for the development of eco-friendly tourism products are various: photo-safari; canoeing; bird watching; hiking tours; local traditional gastronomy; boat rides; horse-riding tours; organic production; eco-friendly family farms, etc.

## **HUNGARY**

The possibilities for sustainable and nature oriented tourism are given in the area, which are provided by the different areas of the Danube-Drava National Park. In this respect the involvement of other areas is unsubstantiated.

Among the proposed tourism zones no new areas appear, so they compound with the present core areas:

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<sup>6</sup> The level of protection in Croatian national parks is much more strict than in Hungary and it for example does not allow commercial use of forests, hunting or building of dams.

1. Harkány-Villány-Siklós area
2. Mohács and its surroundings
3. Baja and its surroundings
4. The areas of the Danube-Drava National Park

## **SERBIA**

Special nature reserve Gornje Podunavlje is the main attraction in Zapadnobačka oblast and municipalities Apatin and Sombor. It represents the basis for tourism development. It is enhanced by rich cultural heritage based on multicultural tradition. By developing transport infrastructure and the international marine in Apatin the area could become the hub for nautical tourism.

## 4. SWOT ANALYSIS AND STRATEGIC CONSEQUENCES

### 4.1. COMPARATIVE SWOT ANALYSIS OF THE BÉDA-KARAPANCSA PILOT REGION

#### STRENGTHS

##### *General framework conditions*

- Since 2007 the three countries negotiated on the highest level (state) about the mutual maintenance and development of cross border protected areas (September, 2007 a 3 party presidential meeting in Beli Manastir/Pélmonostor)
    - The Danube Drava National Park is managing a mutual ecological development program with the two neighbouring areas which already has its first results
      - They created a complete ecological value estimation
      - They harmonized the functioning of the nature protection organisations
  - Accessibility:
    - In terms of accessibility it is very important that the M6 motorway has been completed in 31<sup>st</sup> March, 2010
      - The motorway can be connected to the improvement of accessibility of the Béda-KrapanCSa areas
      - The motorway can be connected to the main transport corridors of Hungary and the European Union as well (TEN V/C)
    - Osijek as the biggest town in study area is from the year 2009 connected to European motorway network by motorway Slavonika (a part of corridor Vc) to junction Sredanci on Croatian motorway A3 on corridor X ; Danube as corridor VII
    - Good air accessibility to the area through the Osijek airport
  - Creation of Mura - Drava - Danube World Biosphere Reserve as the biggest UNESCO World Biosphere Reserve in Europe (“European Amazon”)
  - The areas of the pilot project and the surrounding settlements act as a very good example of the natural and cultural heritage protection
  - Out of the three partner regions two (Croatian, Hungarian) possesses a very important wine culture
  - Established mutual ecological program between three neighbouring countries (HU-CRO-SRB) related to the estimation of ecological value of the area
  - There are protected natural areas covering the most important phenomena of natural swamps in all three countries covering the study area
  - Tradition in cooperation (business, culture, civil sector, etc.) between regions
  - No language barriers in relation to CRO-SRB
  - Multicultural image of the area with minorities on all sides of the border and speaking all languages (Hungarians in Croatian and Serbian part, Croatians in Hungarian and Serbian part and Serbs in Croatian and Hungarian part)
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### *The evaluation of tourism*

- The valorisation of ecotourism and tourism products connected to nature as a main trend in the world as well
  - There are already present synergies between the wine route networks on Hungarian and Croatian side of the border
  - The perfectly organised system of hunting tourism – based on the traditions – functions well in all the three areas of the Béda-Karapanca region
  - The “Busójárás” (“Poklada”) is a UNESCO World Cultural Heritage since 2009, which can also be connected in its cultural traditions to the two other partners
  - Three international bicycle routes in the area - infrastructure for cycling tourism development
  - Tradition in organization of ethno events and new events for touristic purposes
-



## OPPORTUNITIES

### *General framework conditions*

- There will be a possibility in the three countries with different European Union statuses (Hungary: full member of the EU, Croatia: right before the joining, Serbia: the negotiations already started) in the development of tourism
  - The role of the Hungarian-Croatian IPA cross border cooperation and IPA CBC Croatia-Serbia
    - One of the most important results of this program is the elaboration of a regional tourism product plan in the Hungarian-Croatian cross border areas
      - In 2011 the tenders will be announced to the determined tourism products
  - There will be a fortunate development in uniformity in terms of e.g. regulations, judicial harmonisation
  - The further development and creation of the M6 motorway southwards to the Croatian areas
    - The creation of a Hungarian-Croatian motorway connection on corridor V c (the only missing link Boly - Osijek in Baranya)
  - The casual cross border station in the Danube between the Serbian and the Croatian side (Bezdan Bridge)
  - The Danube Regional Strategy
    - Its approval is due by 2011
    - One of the priorities of this strategy is the support of tourism and the culture of the Danube
    - The tourism positioning of the Danube
    - The creation of a uniform, joint tourism product
    - The areas of the pilot project could appear as uniform, organic destination and could develop to be a tourism destination
-

### *The evaluation of tourism*

- The utilisation of the Danube as a fishing water resource
  - The utilisation of the traditional local products in tourism (agro tourism)
  - The monuments of the region's settlements can/could be the scene of further programs and cultural tourism attractions
  - There are different types of tourism products directions complementing each other in the region which could be further developed
  - The adaptation of the South Transdanubian eco portal system
  - The DDOP's tourism great scale programs (South Transdanubian Operative Program) related to the Danube Drava National Park will be established in the region by 2011 and so they will step in and appear in the supply side (e.g. Mohácsi Sátorhelyi Emlékpark/Sátporhely Memorial Park, Mohács harbour base)
  - A uniform appearance in the tourism market
  - The area may develop into a spatial brand
  - A uniform tourism management system and marketing should be developed
    - The creation of a uniform spatial TDM organisation
  - Existence of two attractions on UNESCO tentative list of heritage protection: Old Town Tvrđa in Osijek and Roman Danube Limes
  - Easier border crossing regime in the border area
  - Tourism development supported by strategic documents at regional level
  - Good navigable conditions for the development of nautical tourism in the area
  - The developing rural tourism in Sombor municipality (with eco,- rural and ethnic content)
  - Policy recommendation platform – as the pilot project is functioning in the three countries
  - Innakovič Spa in Apatin – the development of aquapark and spa tourism in the area
-

## WEAKNESSES

### *General framework conditions*

- There is the consequence of the different type of judicial statuses of the states in tourism that the categories of protected areas can only hardly be harmonised
  - It will raise problems mainly in the private and entrepreneurial sector
- The three borders can be understood as physical limits as well
  - The difficulties of border crossings form the point of view of the tourists as well
- The lack of establishment of the personal shipping on River Danube
- Big distance from main European tourism markets
- All the three areas are having peripheric allocation
  - They are underdeveloped and peripheric areas in a complex approach, from different points of view
    - Underfinanced local governments
    - Powerless local economy
    - Unfavourable demographic conditions
    - Weak entrepreneurial activity
    - The weakness of the civilian and the non profit sector
- Lack of consistent policy for tourism development (TMDO; low level of promotion activities)
- Low visibility of destination

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### *The evaluation of tourism*

- Low level of water tourism development vs. potentials
  - The supply of quality accommodations is low
  - Lack of quality accommodation capacities (except in Croatia)
  - The organisation system of the regional tourism management is un-established in the complete region
  - The complete lack of cross border tourism turnover and traffic
  - The low level of tourism cooperations between the partners
-

## THREATS

### *General framework conditions*

- There are only bilateral co-operations among the countries, there are no CBC programmes for all the three countries:
    - Hungary – Croatia, Hungary – Serbia, Croatia - Serbia
    - The IPA only supports the Croatian-Hungarian cooperation
      - So there is no chance to develop a common cooperation development to the three protected areas
  - The three areas are in three different statuses in the countries
    - National park, nature park, protected area
      - The protection categories and their requirement system is different
      - The question of EU compatibility
  - There is still a lot of mine suspected areas, including the most attractive areas in Kopački rit nature park and near Drava river bend
  - All the three areas remain as peripheral regions
    - So for the project initiations the lack of internal source can be rendered probable
- 

### *The evaluation of tourism*

- The restriction of tourism developments because of the values of nature protection
    - Restricted goods and restricted turnover
      - So there is no adequate recompense to the developers or investors
      - The infrastructure can not be built on such a restricted turnover
  - Strict limitations of the protected areas
    - The certain tourism forms can restrict each other and the appearance of new tourism products in the protected areas (e.g. hunting vs. eco-tourism)
  - The tourism product supply of the region will not be broadened
  - Uniformed product management will not be possible
    - The uniform appearance of product management will not be materialized
  - The tourism developments within the project area will not evolve enough to influence on the region's tourism
  - Altering development institutional system (regional development, rural development, tourism development)
  - Possibility of incompatibility between strategic development documents and spatial planning
  - Complicated legislation in rural and spa tourism in Croatia is discouraging tourist investments
  - There is potential conflict between ecotourism and forest and water management, as well as with hunting tourism
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## 5. THE STRATEGY OF BÉDA-KARAPANCSA PILOT PROJECT

Vision	An authentic and sustainable quality tourism destination not divided by the borders									
Comprehensive objectives	The "Middle Danube Green Destination" should appear as one of the independent tourism destinations of the Danube Valley									
Priorities	1. The development of tourism and culture of the Danube intensifying each other				2. The strengthening of tourism's and the local economy's cooperation			3. The creation of a joint tourism product		
Specific objectives	1.1 The development of various nature based types of tourism driven by the status of Mura-Drava-Danube UNESCO World Biosphere Reserve	1.2 The development of cultural tourism based on rich and unique cultural heritage and various events and manifestations – based on the joint Danube culture	1.3 The development of tourism and supporting infrastructure	1.4 The strengthening of the social background and transnational cooperation	2.1 The incentive of the local production of traditional agrarian and craftsmen products	2.2 The improvement of the conditions of guest catering	2.3. The coordination among tourism and the related economic branches	3.1 The creation of an informal network of regional TDM (tourism destination management) organisations	3.2 The creation of a regional marketing and PR system	3.3 The strengthening of the regional cohesion
Concrete objectives	1.1.1 The development of ecotourism based on the resources of Mura-Drava-Danube UNESCO World Biosphere Reserve, with special accent on bird watching	1.2.1 The support for the creation of the Roman Danube Limes UNESCO World Heritage Site through creation of adequate interpretational and informational infrastructure	1.3.1 The development of water tourism, with special emphasis on the development of ports and eco stations or stopping places (river cruising)	1.4.1 The strengthening of the local civilian sphere including the transmission of adaptation samples or models	2.1.1 The development and creation of image products, especially regarding wine and food (especially fish and game food)	2.2.1 The quality and quantity development of accommodation and guest catering services	2.3.1 The coordination of tourism development with forestry, and hunting associations	3.1.1 The promotion of the self-organisation of local actors in the tourism market (with a special attention on local governments)	3.2.1 The creation of a joint regional event calendar	3.3.1 The strengthening of the cross border relations and connections
	1.1.2 The development of rural tourism supported by wine and equestrian tourism and strong accent on gastronomy	1.2.2 The creation of the cadastre of tourism attractions of the region including the evaluation tourism importance	1.3.2. The complex development of event locations	1.4.2 The strengthening of traditional manifestations and tradition keeping groups (folk, dance, old customs, gastronomy etc.)	2.1.2 The promotion and spread of gastronomy traditions among the local guest caterers: region-characteristic menu	2.2.2 The introduction of various international and local quality labels in accommodation and guest catering	2.3.2 The coordination of tourism development with water management and nature protection	3.1.2 Education of local stake holders in TDM, especially leaders of local and regional tourism organizations	3.2.2 Cooperation of local tourism organizations in marketing (joint brochures, joint appearance on tourism fairs etc.)	3.3.2 "Neighbouring": the strengthening of getting to know each other, the introduction of the local values
	1.1.3 The creation of transnational network of cycling routes, wine routes, and various walking/hiking nature based educational paths	1.2.3 The development of cultural tourism in the region including business and religious tourism and creation of thematic cultural routes and walking paths	1.3.3 The creation of unified system of the outdoor interpretation of tourist attractions and tourist signalization	1.4.3 The strengthening of nature and heritage protection organisations	2.1.3 The support for the creation of unique local souvenirs and art products	2.2.3 The incentives for the usage of traditional building techniques (straw, clay etc.)	2.3.3 The promotion and support for the cooperation with food and wine producers	3.1.3 The creation of a common TDM model	3.2.3 The support for the unification in information on local tourism and municipal web pages	3.3.3 Easement of border procedures including creation of temporary international border crossings over the Danube for tourism purposes
	1.1.4 The formulation of joint strategy and linking of the supply of fishing and hunting tourism in the whole region	1.2.4 The development of various types of tourist products based on festivals, events, manifestations and MICE (meetings, incentives, conventions, exhibitions)	1.3.4 The upgrading of the infrastructure network and joint marketing for all types of water based and health & wellness tourism	1.4.4 The support for various forms of transnational cooperation (twining towns and municipalities, joint manifestations, regattas, races etc.)	2.1.4. The promotion and spread of architectural and construction tradition/heritage among local guest caterers (RDA)	2.2.4. The promotion and support of local gastronomy within the scope of the local population	2.3.4. The promotion and support of the traditional lifestyle and traditions of local people	3.1.4 The creation of the transnational coordination entity dealing with TDM	3.2.4 Creation of a joint homepage of Middle Danube region	3.3.4. The creation of a professional network system

*Vision: An authentic and sustainable quality tourism destination not divided by the borders*

The environmental and historical-cultural background of this segment of the Danube area integrates the tourism resources of the region, mobilizes the advantages of the neighbouring countries creating a recognisable tourism brand, a river destination in the Béda-Karapanca region as well.

The basis of this is the strengthening of the spatial, Danube identity and the valorisation of the nations and countries of Hungary, Croatia and Serbia from an authentic and sustainable perspective and also from the point of view of open borders. All this, due to the networking tourism developments and the cooperation between the concerned countries, results in market oriented tourism products and a uniform tourism façade.

*Comprehensive objective: The “Middle Danube Green Destination” should appear as one of the independent tourism destinations of the Danube Valley*

The basis for the unique, recognisable and uniform tourism façade of the “Middle Danube Green Destination” is its unique natural-historical and the cultural resources. Their present establishment, development and realisation can only be recognised when first a common Danube brand will be created afterwards the sections of the river will gain their touristic value as well. The improvement of the unfavourable starting situation can only be achieved by the exploration of the present potentials and their development to tourism products.

The already determinable central areas having an independent profile are interconnected with each other along the river strengthening their environment as well. The supply of the core areas become complex in which the major emphasis is on the natural and cultural thematics of the Danube.

*Priorities*

*The development of tourism and culture of the Danube intensifying each other*

One of the most important elements in the creation of a joint tourism product and a uniform façade of the Béda-Karapanca region is its natural and cultural endowments. This priority intends to strengthen the tourism industry and the region’s cultural awareness and identity with the development of various nature based types of tourism driven by the status of Mura-Drava-Danube UNESCO World Biosphere Reserve, the development of cultural tourism based on rich and unique cultural heritage and various events and manifestations – based on the joint Danube culture, the development of tourism and supporting infrastructure and the strengthening of the social background and transnational cooperation

*The strengthening of tourism’s and the local economy’s cooperation*




Both in the Danube Region and within that in the Béda-Karapanca pilot project area, the basic aim for tourism development is the strengthening of the local economy. Tourism taking part in revealing the local resources shows a clear well organised direction with its requirements (attraction reveal, services and programs, organising and marketing). It is an important task to utilise the demand stimulating effects of tourism in the improvement of the local economy’s positions. The integration of the actors of the economy and the stimulation of their co-operation is a target and a tool as well. In both areas tourism could take a significant part. All these favourable interferences between the two professional branches make the realisation of the priority very much reasonable by the incentive of the local production of traditional agrarian and craftsmen products, the improvement of the conditions of guest catering and the coordination among tourism and the related economic branches.

### *The creation of a joint tourism product*



In order to enhance the tourism industry of the Béda-Karapanca region in a complex approach the development of tourism services and products is naturally one of the most important actions to be made. Since the area itself is not so well known on the international level, besides tourism product development, the brand and the image of the region could be significantly strengthened by adequate and sustainable tourism services development. This priority provides an elaborate description of how the services and the product development of the region should be enhanced based on the creation of an informal network of regional TDM (tourism destination management) organisations, the creation of a regional marketing and PR system and the strengthening of the regional cohesion.




# 6. LOCAL INVESTMENT OPPORTUNITIES, ACTION PLAN


**CROATIA:**


<p>Project title and location:  <b>Construction of a bicycle and motorcycle camp in Suza</b>          /infrastructure/  <b>Suza, municipality of Kneževi Vinogradi, Osijek-Baranja county, Croatia</b></p>	<p>Photos</p>
<p>Goal:          Activities: Construction of a camp for cyclists and motorcyclists, capacity for 50 campers, on 1 hectare area. The project also includes ancillary infrastructure, additional sporting and recreational facilities, and catering facilities. This segment of tourism is growing due to international cycling routes passing through this area. Realization of this project would allow for diversification of the tourism offer provided by the Kolar farm, which currently includes vineyards, a winery, a tasting room, a restaurant and accommodation facilities. Opening of the camp is envisaged for May 2012.          Amount: €60.000          Duration: 12 months</p>	 
<p>Potential stakeholders:          Target group: tourists (individuals, groups), inhabitants of this area, business sector in tourism, local self-government          LB: Family and tourism farm Ljudevit Kolar, Suza          Partners: Ministry of Tourism of the Republic of Croatia          Contact person: Ljudevit Kolar, M. Tita 96c, 31 308 Suza; tel: +385.91.521.86.23; email: ljudevit.kolar@os.t-com.hr</p>	
<p>Other relevant information: (challenges, risks, social contribution): utilization of the tourism potential of international cycling routes :Danubian Route Pannonian Peace Trail</p>	



<p>Project title and location:  <b>Middle Danube Visitor Centre</b>  /tourism suprastructure/  <b>Zlatna Greda, municipality of Bilje, Osijek-Baranja county, the Republic of Croatia</b></p>	<p>Photos</p>
<p>Goal: Promotion of the Central Transdanubia as a tourism destination in an environmentally protected area on the border among Croatia, Hungary and Serbia</p> <p>Activities: The project envisages establishment of Danubian tourism centres as multimodal centres that will promote the Central Transdanubia in all three countries. Part of the existing infrastructure in eco-centre Zlatna Greda (HR) will be reconstructed and organized as an informative, promotional and educational centre. The other two centres are envisaged on the location in the National Park Dunav-Drava in Mohacz (HU), and in Bezdan (SRB), as part of the monument Batinska bitka. In addition to providing the same services to tourists and other stakeholders, all three centres will also promote the values of the Central Transdanubia in all three countries, based on mutual cooperation and networking. The natural attraction will be therefore promoted within a transnational context.</p> <p>Amount: €120,000</p> <p>Duration: 24 months</p>	 
<p>Potential stakeholders:  Target group: tourists (individuals, groups), inhabitants of the area, business sector in tourism, local self-government, tourism organizations  LB: ZELENI-OSIJEK, Association for Nature Conservation  Partners: Tourism organization of the town Sombor (SRB); National Park Dunav-Drava, Mohacs (HU)</p>	
<p>Contact person: Jasmin Sadiković, manager; GREEN-OSIJEK, Association for nature and environment protection; Opatijska 26f; 31 000 Osijek; tel: +385.31.565-180; zeleniosijek@zeleni-osijek.hr</p>	
<p>Other relevant information: (challenges, risks, social contribution): a rarity in the tourism suprastructure, because currently there are no such transnational centres for tourists and promotion of broader area</p>	


<p>Project title and location:  <b>Pilot project of founding a regional tourism consortium/TDMC</b>  /suprastructure/  <b>Baranja, Osijek-Baranja county, the Republic of Croatia</b></p>	<p>Photos</p>
<p>Goal: destination management on a pilot project area in Baranja  Activities: The project envisages foundation of a consortium of tourism development stakeholders (business sector in tourism, local self-government, tourist boards, other stakeholders) and DMC, the mission of which would be to manage a destination on a pilot project area in Baranja by defining, selling and marketing of packages for all users of TDMC services. The project also envisages development of standards of quality, i.e. criteria for categorization of tourism facilities and books of rules. Important activities include education of stakeholders in the field of marketing and branding for Baranja area.  Amount: €80,000  Duration: 18 months</p>	 
<p>Potential stakeholders:  Target group: business sector in tourism, local self-government, tourist boards, other stakeholders in tourism development  LB: Tourist board of Baranja  Partners: Istrian management centre, Cooperative of Istrian agro-tourism and rural tourism Istra Ruralis, Ministry of Tourism of the Republic of Croatia</p>	
<p>Contact person: Nenad Bračun; Tourist board of Baranja; Imre Nagya 2, 31 300 Beli Manastir; tel: +385.31.702.080; email: <a href="mailto:info@tzbaranje.hr">info@tzbaranje.hr</a></p>	
<p>Other relevant information: (challenges, risks, social contribution): application of the existing TDMC models; possibility of cross-border cooperation with neighbouring countries</p>	


<p>Project title and location:  <b>Construction of small marinas on the Danube</b>          /infrastructure/  <b>Dalj, Općina Erdut, Osječko-baranjska županija, Republika Hrvatska</b></p>	<p>Photos</p>
<p>Goal: Utilization of water resources of the Danube in tourism          Activities: The project envisages construction of 2 small marinas and setting up of mooring buoys in Dalj and Aljmaš, to facilitate mooring of small river vessels used for tourism purposes. The project would facilitate activation of attractive tourism potential of the Danube, contribute to creation of integrated tourism offer of settlements and the area, and it would also have impact on growth of tourism demand in special market segments and development of nautical tourism.          Amount: €150,000          Duration: 18 months</p>	
<p>Potential stakeholders:          Target group: tourists, inhabitants of the area, business sector, local self-government          LB: municipality of Erdut          Partners: Hrvatske vode, Fishermen associations</p>	
<p>Contact person: Jugoslav Vesić, head of municipality, municipality of Erdut; Bana Josipa Jelačića 4, 31 226 Dalj; tel: +385.31. 590. 111; email: opcinaer@inet.hr</p>	
<p>Other relevant information: (challenges, risks, social contribution): new tourism infrastructure</p>	

<p>Project title and location:  <b>Swimming areas in municipality of Erdut</b>          /infrastructure/  <b>Erdut, Aljamaš, Bijelo Brdo, Dalj;</b>  <b>municipality of Erdut, Osijek-Baranja county, Republic of Croatia</b></p>	<p>Photos</p>
<p>Goal: Strengthening tourism offer in the Croatian part of the Danubian area          Activities: Project envisages 4 swimming areas in settlements of municipality of Erdut. Three swimming areas will be located on the Danube (Aljmaš, Dalj, Erdut) and one will be made on the Stara Drava river (Bijelo Brdo). They could accept up to 2,000 swimmers/tourists during summer months. This project would provide a good foundation for development of recreational tourism during summer months and additional elements of tourism offer. It would also make the whole area more attractive.          Amount: €55,000          Duration: 12 months</p>	
<p>Potential stakeholders:          Target group: tourists, inhabitants of the area, business sector, local self-government          LB: municipality of Erdut          Partners: Utility company of the municipality of Erdut, Hrvatske vode</p>	
<p>Contact person: Jugoslav Vesić, head of municipality, municipality of Erdut; Bana Josipa Jelačića 4, 31 226 Dalj; tel: +385.31.590.111; email: <a href="mailto:opcinaer@inet.hr">opcinaer@inet.hr</a></p>	
<p>Other relevant information: (challenges, risks, social contribution): new attraction points</p>	



**HUNGARY:**

<p>Project title and location:  <b>The extension and development of the eco and environment friendly guest catering system in the region</b></p>	<p>Photos</p>
<p>Goal: The adaptation of a qualification system of eco and environment friendly guest catering system in the region</p> <p>Amount: €10,000          Duration: 12 months</p>	
<p>Potential stakeholders:          Target group: tourists, inhabitants of the area, business sector, local governments</p>	

<p>Project title and location:  <b>The coordination of tourism networks and thematic routes in the region and their coordinated development</b></p> <ul style="list-style-type: none"> <li>○ Wine routes</li> <li>○ Event network</li> <li>○ Eco tour routes</li> </ul>	<p>Photos</p>
<p>Goal: To achieve a common coordination of tourism networks and thematic routes in the region and their coordinated development in the fields of wine routes, event networks and eco tour routes which are embodying one of the most important tourism products of the PiP2 area in order to satisfy the needs of sustainable tourism development in the area.</p> <p>Amount: €35,000          Duration: 12 months</p>	
<p>Potential stakeholders:          Target group: tourists, inhabitants of the area, business sector, local governments</p>	




<p>Project title and location:  <b>The creation of a regional TDM organisation on the region</b></p>
<p>Goal: To achieve a common coordination of tourism networks through a regional TDM organisation that would cover the tourism activities of the PiP2 area in order to satisfy the needs of sustainable tourism development in the area.</p> <p>Amount: €45,000  Duration: 12 months</p>
<p>Potential stakeholders:  Target group: tourists, inhabitants of the area, business sector, local governments</p>

<p>Project title and location:  <b>The creation and maintaining of the joint homepage of the region</b></p>
<p>Goal: To create and further maintain a joint homepage of the region in order to raise its marketing and promotion activities and the knowledge of the area in the potential visitors and tourists</p> <p>Amount: €10,000  Duration: 12 months</p>
<p>Potential stakeholders:  Target group: tourists, inhabitants of the area, business sector, local governments</p>

<p>Project title and location:  <b>Annual publication of a joint event calendar in both three languages, plus English and German</b></p>
<p>Goal: To create and further maintain a joint event calendar of the region in order to raise its marketing and promotion activities and the knowledge of the area in the potential visitors and tourists</p> <p>Amount: €16,000  Duration: 12 months</p>
<p>Potential stakeholders:  Target group: tourists, inhabitants of the area, business sector, local governments</p>

**SERBIA:**

<p>Project title and location:  <b>Children’s playground and hiking tracks infrastructure around Junakovic Spa</b>          /equipment and infrastructure/  <b>Junaković Spa; municipality of Apatin, Vojvodina county, Republic of Serbia</b></p>	<p>Photos</p>
<p>Goal: Strengthening tourism offer          Activities: Project includes construction of ecological children’s playground and provision of hiking infrastructure.          Playground will be located near the complex of 10 open pools in Junakovic Spa. Modern playgrounds will have recreational equipment. Pools could accept up to 2,000 swimmers/tourists during summer months. This project would provide a good foundation for development of recreational tourism during summer months and fun for children and additional elements of tourism offer. It would also make the whole complex more attractive.          Amount: €60,000          Duration: 12 months</p>	
<p>Potential stakeholders:          Target group: tourists, pool visitors, local self-government          LB: municipality of Apatin          Partners: Municipality of Apatin, Eco rural net Backa</p>	
<p>Contact person: Živorad Smiljanić , head of municipality, municipality of Apatin; Srpskih Vladara , 25 260 Apatin; tel: +381.25. 772.122; email: <a href="mailto:kabinet@soapatin.org">kabinet@soapatin.org</a> + M. Arch.Milešević Snežana, Coordinator of Municipal Economic Development +38125/772-122, lok. 618 <a href="mailto:snezana.arh@gmail.com">snezana.arh@gmail.com</a></p>	<p>Other relevant information: (challenges, risks, social contribution): new attraction points</p>

<p>Project title and location:  <b>Floating education center</b>          /infrastructure/  <b>Apatin / Vojvodina / Republic of Serbia</b></p>	<p>Photos</p> 
<p>Goal: Promotion of water tourism with the special emphasis on the development of ports, eco stations and stopping places.          Activities: The project envisages establishment of the movable education centre with the capacity for 60 people. The structure and the dimensions should enable high tolerance for navigation. It should contribute to the promotion of eco safari and nautical tourism.          Amount: €150,000          Duration: 15 months</p>	
<p>Potential stakeholders: Tourist organisation of Apatin, Municipality of Apatin, schools and NGOs which operate in the scope of nature protection and education          Target group: Primary and high school students, local population, tourists and scientific organisations          LB: Municipality of Apatin          Partners: Public Company "Vojvodinašume", Public company "Vode Vojvodine", NGOs</p>	
<p>Contact person: M. Arch.Milešević Snežana,          Coordinator of Municipal Economic Development, tel:          +38125/772-122, lok. 618 <a href="mailto:snezana.arh@gmail.com">snezana.arh@gmail.com</a></p>	
<p>Other relevant information:</p>	



Project title and location:  
**Swimming areas, sport fishing areas and rowing tracks**

/suprastructure/  
**Vojvodina/Apatin/Republic of Serbia**

Goal: Creation of regional tourist destinations  
Activities: Provision of a 1000m rowing track, sport fishing strip (1500m) and building of 500m sand beach. It would enhance the tourist offer together with already build marina.  
Amount: €120,000  
Duration: 6 months

Potential stakeholders:  
Target group: Tourist organisation of Apatin, Municipality of Apatin, Sports clubs  
LB: Tourist organisation of Vojvodina  
Partners: Public company “Vode Vojvodine”, Sport fishing club “Bucov”, Sports association of Apatin

Contact person: M. Arch.Milešević Snežana,  
Coordinator of Municipal Economic Development +38125/772-122, lok. 618  
[snezana.arh@gmail.com](mailto:snezana.arh@gmail.com)

Other relevant information:

Photos



## **7. THE BASES OF IMPACT EVALUATION FOR THE PILOT PROJECT**

As described in the previous sections especially the situation analysis, the wider region of the meeting point of three countries may be understood as an outer periphery isolated from the given country's economic circulation system, with still visible wounds of the events of the past decades. Therefore the long term aim of the project is to develop the general social-economic standard of the involved region through tourism and to develop respect and acknowledgement towards each others' values. This project is designed and shall be implemented through a perspective putting into forward sustainability and the European practice of cross-border cooperation and complying with the rules of trans-border regional development (stakeholder involvement, equal opportunities etc.).

The implementation of the proposed projects generally helps the preservation of the weakening or close to extinction heritage, and have a high added value in the development of local culture, economy or society, at the same time minimize the resources to be invested and the negative externalities occurring.

The strategy designed in Béda-Karapanca Pilot Project is built on the vision that the region shall become "An authentic and sustainable quality tourism destination not divided by the borders". The comprehensive objective for the strategy is the following: "Middle Danube Green Destination" should appear as one of the independent tourism destinations of the Danube Valley.

The effects and impacts of the proposed strategy will be easier to measure in case the impact assessment is linked to the selected objective. However, the three comprehensive objectives "The development of tourism and culture of the Danube intensifying each other", "The strengthening of tourism's and the local economy's cooperation" and "The creation of a joint tourism product" all generate a higher level of production (GDP/capita), decrease the level of regional disparities between the involved regions and compared to the core regions of the three countries. In tourism the development shall be visible in the growing flow of tourists and especially international tourists, with growing number of guest nights and average length of stay.

## **8. LINKING TO THE DATOURWAY STRATEGY**

As part of the extended study area, the Béda-Karapanca Pilot Project's objective pyramid – and of course its contents – is linked to the objective pyramid and measures of the Datourway Strategy in many aspects.

Priority number 1 of the Béda-Karapanca Pilot Project's objective pyramid, entitled "The development of tourism and culture of the Danube intensifying each other" is strongly linked with strategical objective number 1 of the Datourway strategy's objective pyramid and measures "Widely utilised tourism potential in the Danube Region". Of course there is a more specific link between the related priorities and their measures of the Datourway strategy (Priority 1.1., 1.2., 1.3) and the specific objectives and concrete objectives of the Béda-Karapanca Pilot Project's objective pyramid (Strategic objective 1.1., 1.2., 1.3. and their concrete objectives).

There is also a strong link between priority number 2 of the Béda-Karapanca Pilot Project's objective pyramid, entitled "The strengthening of tourism's and the local economy's cooperation" which is linked with strategical objective number 2 of the Datourway strategy's objective pyramid and measures entitled "Supporting social-economic background for tourism".

Of course there is a more specific or stronger link between the related priorities and their measures of the Datourway strategy's objective pyramid and measures (Priority 2.1., 2.2., 2.3) and the specific objectives and concrete objectives of the Béda-Karapanca Pilot Project's objective pyramid (Strategic objective 2.1., 2.2., 2.3. and their concrete objectives).

Within the 3<sup>rd</sup> strategical objective, priority 3.1. of the Datourway strategy's objective pyramid and measures entitled "Development of environment culture and environmental protection along the Danube" there is a strong link with specific objective 1.1. of the Béda-Karapanca Pilot Project's objective pyramid, entitled "The development of various nature based types of tourism driven by the status of Mura-Drava-Danube UNESCO World Biosphere Reserve".

We can find no connection links or hardly any relations with priority 3.2. of the Datourway strategy's objective pyramid and measures entitled "Infrastructural development of the Danube Region" with the related points of the Béda-Karapanca Pilot Project's objective pyramid since the latter mentioned document was not directly focusing on the development of infrastructure of the Danube area.

## **9. CROSS BORDER COOPERATION POSSIBILITIES**

One of the highlighted specific objectives of the Béda-Karapanca Pilot Project's objective pyramid and strategy was the strengthening of the social background and transnational cooperation of the pilot project region.

In order to achieve these aims we determined several concrete objectives in the following topics:

- The strengthening of the local civilian sphere including the transmission of adaptation samples or models;
- The strengthening of traditional manifestations and tradition keeping groups (folk, dance, old customs, gastronomy etc.);
- The strengthening of nature and heritage protection organisations;
- The support for various forms of transnational co-operation (twining towns and municipalities, joint manifestations, regattas, races etc.).

In order to achieve more successful results of the cross border cooperations it is also inevitable to join all the countries of the project to the European Union since there will be greater chances of financial support with CBC programmes and other grants and sources funded not only by the member states but by the EU as well.

## **10. MAIN LESSONS OF THE PILOT PROJECT**

Béda-Karapanca is the only of five DATOURWAY pilot projects that is modelling the cross-border tourism development of an environmentally sensitive region on the border of three countries with different geopolitic, legal, social and economic systems. The elaboration and successful implementation of common projects are only possible in case the necessary legal, regulatory conditions are met on all sides. Even during the elaboration of the Pilot project plans very big stress had to be given to the development of the accurate databases and even the understanding of terms and synchronization of expressions. This led to the discovery of the phenomena that with growing number of participating countries, the difficulty of modelling procedure does not linearly but exponentially grow. The system of local administration, conservation areas or environmental protection are so different that either shall the projects be so soft and situated "above" the systems (e.g. raising awareness) or well constructed taking into

consideration all local conditions (development of new qualification systems). In case of an EU member, a candidate and an associate member a high attention shall often be given even to the most fundamental conditions when doing common tourism development.

# Appendix

## The maps and GIS representation of the pilot project area

### Common maps on the pilot project area (in order of appearance in the strategy)

Figure 1. Overview map of the municipalities and micro regions of the PiP 2 area



Figure 2. The settlements, artificial surface and road network of ther PiP2 area

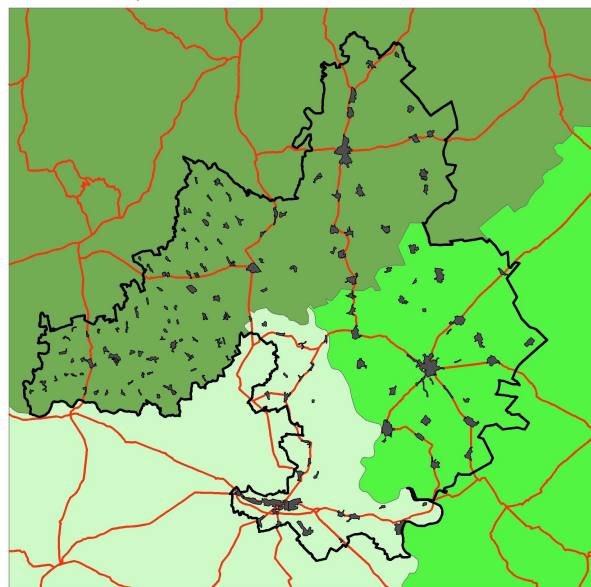




Figure 3. Forest cover and semi natural areas of the PiP2 area

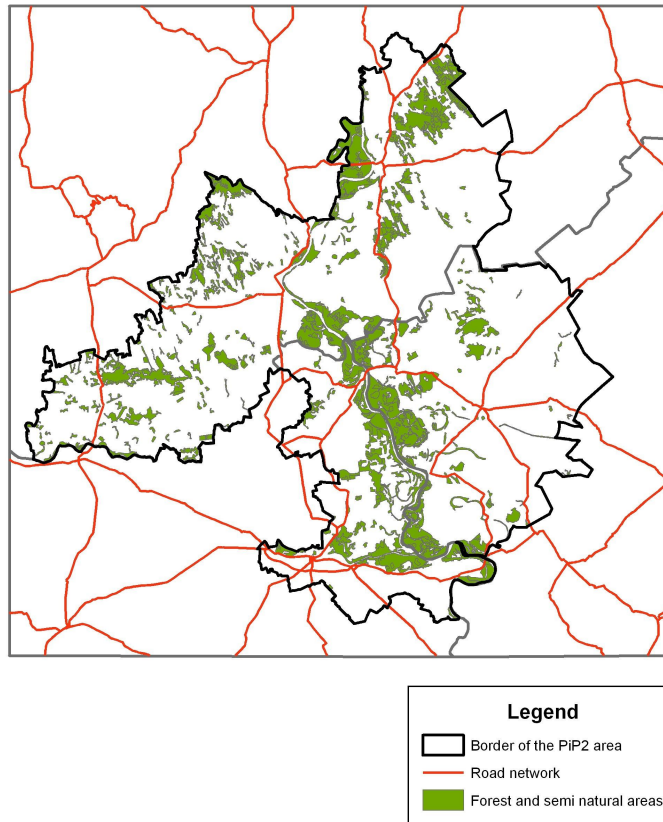


Figure 4. Arable land of the PiP2 area

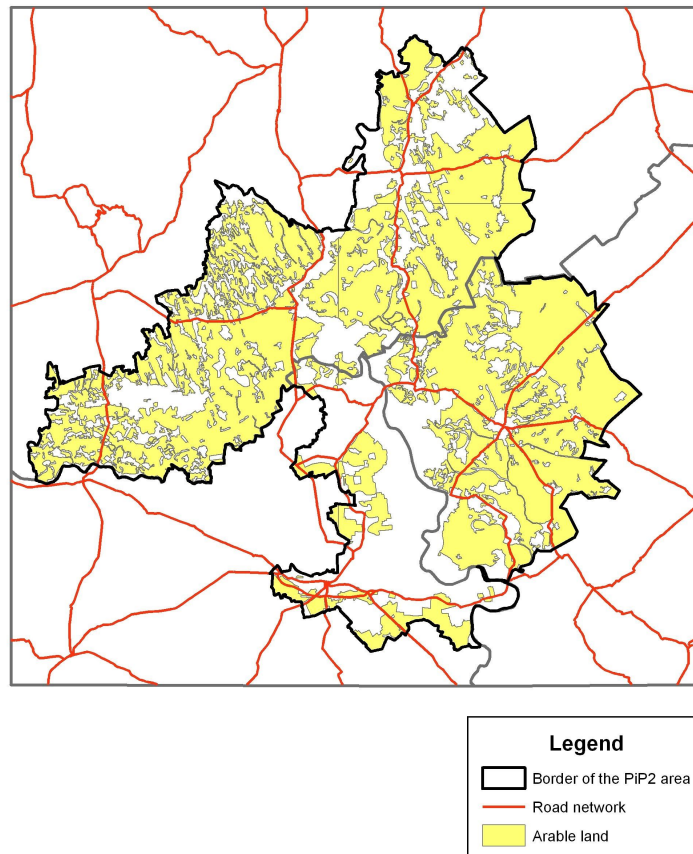


Figure 5. The water bodies and wetlands of the PiP2 area

