

DATOURWAY

The national analysis
of the territorial tourism strategy

CROATIA



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Position of the DATORWAY area

Croatian Danube Area covers two easternmost Croatian counties of Osijek-Baranya and Vukovar-Srijem (NUTS 3) with the surface of 6.609 km² and the population of 536.274 (2001), which is 11,7% of the Croatia's territory and 12,1% of the population.

Although the length of the Danube in Croatia is short (188 km) in comparison with other Danube countries, Danube River is an important factor for the economic, urban, cultural and historical development of Croatia: majority of the territory is drained by the Danube River; it is a natural boundary between Croatia and Serbia; represents a unique basis for cross-border and trans-national cooperation and the regional development.



Croatian Danube area is known as Croatia's most fertile area and due to many natural and cultural attractions it is becoming as one of the most important of all continental touristic areas of Croatia.

There are total nine NUTS 4 microregions in the Croatian Danube area. Six microregions

are in Osijek-Baranya County - Osijek, Đakovo, Našice, Beli Manastir, Valpovo and Donji Miholjac and three in Vukovar-Srijem County – Vukovar, Vinkovci and Županja.

In administrative sense, in Croatian Danube area there are 12 towns and 61 municipalities: 7 towns and 35 municipalities in Osijek-Baranya county and 5 towns and 26 municipalities in Vukovar-Srijem County. The most important town in the area is Osijek as

the capital of Osijek-Baranya County with 114.616 inhabitants (2001). Other towns are much smaller, such as Vinkovci (35.912), Vukovar(31.670), the capital of Vukovar-Srijem county and Đakovo (30.092). Other towns have between 8.000 and 20.000 inhabitants.

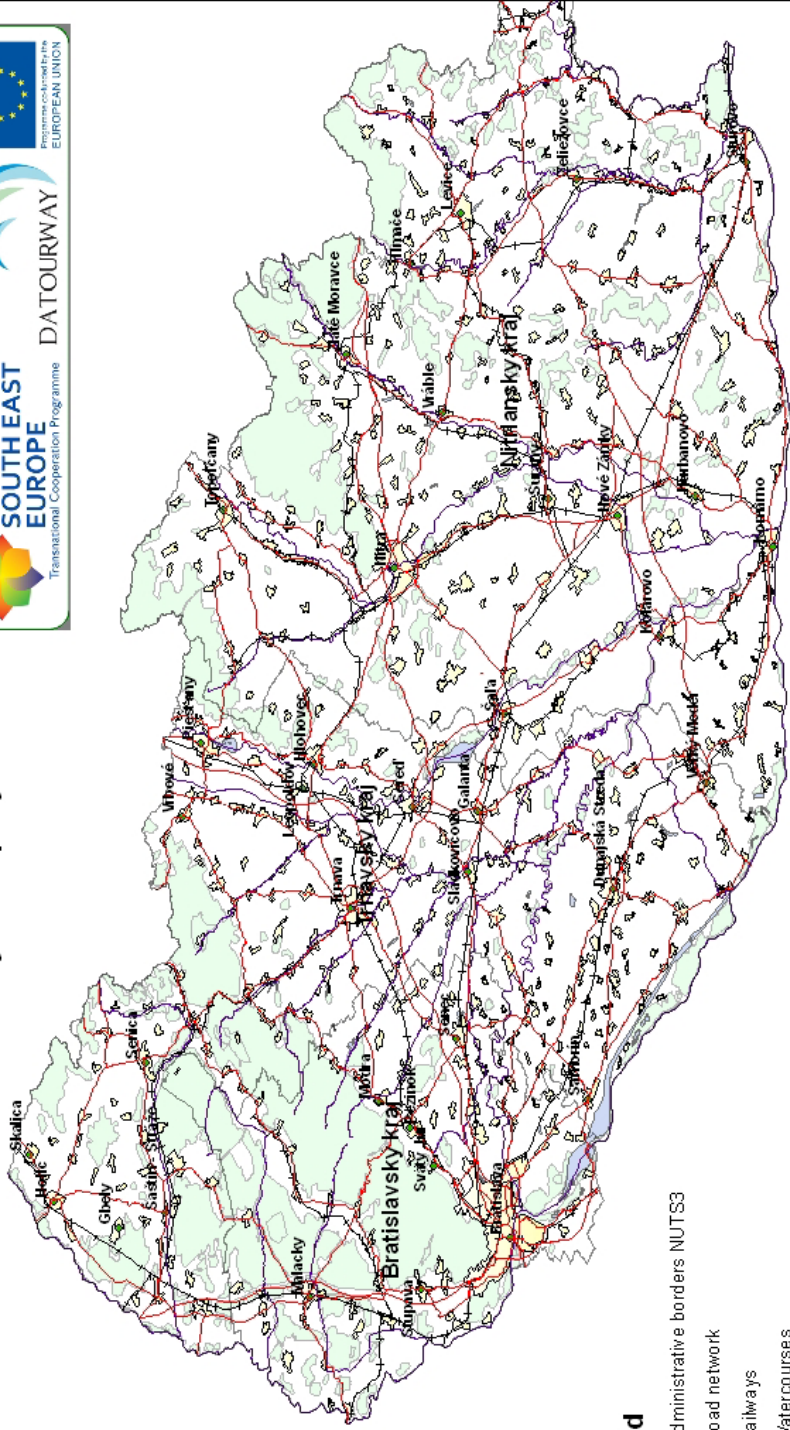
The Croatian Danube area was the most destroyed during Croatia's Homeland War (1991-1995), especially Vukovar which was occupied until 1998. The war damage, beside other factors such as process of economy transition and world crisis led this part of Croatia, once one of the most developed, to the level with majority of economic indicators under the Croatian average.

Croatian Danube region belongs to Continental Croatia as generally undeveloped area from the tourism point of view.









While the national Strategy on Development of Croatian Tourism (2010) mostly focused on tourism of the coastal areas, it treats tourism development in the continental part, and consequently the Croatian Danube region in general, through the possibilities for rural tourism including hunting, fishing and various forms of activities in the countryside, pointing out well organised destination management, Regional strategic documents and county development strategies treat tourism development in the Danube Area through strategic priorities and measures such as promotion of destination based upon the selective types of tourism; development of human capacities and development of tourist infrastructure taking into consideration international dimensions and growth trends of the tourism development in the Danube area.


In last five years the results of tourism activities in Croatia's Danube Area are relatively good considering the location and attractiveness of the area. Such trends show that Danube Area has strong tourism potential and with adequate incentives it may become one of the leading areas of continental tourism in Croatia as well as the important factor of future development of the region.

Daturway - the project area



Legend

-  Administrative borders NUTS3
-  Road network
-  Railways
-  Watercourses
-  Cities
-  Settlements
-  Lakes
-  Forests

0 5 10 20 Kilometers


Created by RRA Šamorín, 2010

Geographical characteristics

Croatian Danube Area's most important natural resources are the arable land and forests, especially oak forests.. The arable land in the Danube Area comprises almost 30% of Croatia's total arable area. Forests cover around 30% of the area. Important natural resources are also numerous natural protected areas and three big rivers: Danube, Sava and Drava. There are several lakes and many fishponds.. Some lower hills can be found in Baranya and around Erdut and Đakovo with famous vineyards. Majority of the territory is less than 200 m above sea level, except for some higher hills in the western part of the area (605 m).



Major natural protected areas:

Nature Park "Kopački rit"
- natural swamps famous for numerous plants and animal species; protected as Ramsar site in 1993;

Special Zoological

Reservation inside the NP "Kopački rit";

Protected landscape: Erdut (vineyards), Spačva and Vuka rivers and Virovi (swampy areas with oak forests);

Ornithological reservation: Podpanj;

Reservation of forest vegetation: Lože, Radiševo, Vukovarska ada; Šarengrad ada;

Park forests: Kunjevci, Zvirinac, Kanovci.

Smaller protected areas are natural monuments such as meadows, trees and sixteen monuments of park architecture.

The majority of protected areas are also included in the Natura 2000, i.e. 25 areas and 12 points, among which the largest areas include NP Kopački rit, areas close to the Danube and Drava rivers and huge area of Spačva with swamps and oak forests in the south of Vukovar-Srijem County.

There are also four very large areas important for bird species including the territory close to the rivers of Danube and Drava, as well as area near large fishpond Grudnjak in the west of the Osijek-Baranya county and Spačva swamp.

Natural resources in combination with social and cultural tradition brought many indigenous products for the Danube region representing a great potential for rural tourism development.

Despite its potentials, the importance of the tourism sector in the overall economy performance of the Croatia's Danube Area is not significant. Tourism sector represents 3,8% of the companies, 2,5% of the employment and 1% of the revenues (2009). But recently there has been certain advancement. Tourism development became an integrated part of the strategic planning documents at regional level. Since the Croatia is traditionally recognized as the coastal tourist destination, development of continental tourism has been neglected. But, strategic approach in tourism development in both counties in the Danube Area puts the Danube River into the focus as the opportunity for further development, strengthening and growth of the area. A number of cross-border and transnational projects have been implemented and planned in tourism sector in this area.

The area is rich in tourist attractions of international, national and regional importance.

Among natural attractions we select the Danube River as well as Sava and Drava rivers; protected reservations such as the Nature park Kopački rit with zoological reservation and ornithological reservation Podpanj; Bizovac spa centre; protected landscape (Erdut, Spačva, Lože, Radiševo, Vukovarska ada).

Since the Croatian Danube area had a rich and turbulent history, it is abundant with various cultural heritage sites, such as archaeological remains from Roman and pre Roman period, attractive churches, fortresses, castles, ethnological heritage, as well as the old wine cellars and monuments from recent history.

The most important archaeological monument is the site called Vučedol from prehistoric “copper” period as one of the most important Europe from this time. Danubian limes in Vukovar-Srijem County as Croatian part of the Frontiers of the Roman Empire is on the tentative list of UNESCO.

Among architecture attractions, there is a unique Historical Town Planning Ensemble Tvrđa (Fort) in Osijek from 18th century, which is on the tentative list of UNESCO too.

The most attractive church in the whole area is the Đakovo Cathedral from the 19th century, built in Romanic style as the most important church in whole Slavonia.

Very attractive is also the Osijek Cathedral, the church of St Elias (Meraja) in Vinkovci, St Anthony from Padua in Našice, St. John Capistran in Ilok and small church of St. Peter and Paul in Topolje in Baranya. In Aljamš, on the Danube coast, there is a famous national pilgrimage site with the Church of Our Lady of Sanctuary

and Shrine of Our Lady in Ilača.

The easternmost Croatian town of Ilok is known also for his medieval town as cultural and historical complex and wine cellars, as well as nearby Erdut on Danube with the largest wine barrels in the world. Near Danube there are three wine areas, Baranya, Erdut and Ilok with wine cellars and routes.

Among many preserved castles and manors in Slavonia the most attractive are the castles in towns of Donji Miholjac, Našice, Valpovo, Vukovar (some of them with well preserved fortresses), Ilok, Nuštar and manors in Bilje and Tikveš near Kopački rit.

There are also many cultural events of different character (traditional/ethno, film and music festivals, fairs, etc.) which are attracting people for many years. The most important and well known traditional festivities in the region are the so called "Vinkovci Autumns" and "Đakovo Embroidery". Vukovar film festival and International Jazz Festival in Osijek are of international significance.

Museums, galleries and art colonies are also present in the area. Horse farm of special Lipizzaner breed is situated in Đakovo, also known for the strongest tradition of horse breeding in Croatia.

The recent history is the most present in Croatian hero city of Vukovar, with museum on Ovčara scaffold and War cemetery.

On a very attractive view point over the Danube river in Batina there is an important monument from the Second World War – a unique memorial to the Russian Red army.

Some of special attractions in the area represent four international bicycle routes: Panonian route of peace, Drava bike tour, Donauradweg and Srijem.

In the last few years the offer of rural tourism is in expansion, especially in Baranya area.

In the Danube region there are more than 50 restaurants, mostly

concentrated in larger cities.

As for the accessibility of the area, it is well connected with the neighbouring countries and the rest of Croatia. Through the area there are two European corridors, corridor X and Vc and the Danube as corridor VII. Road transport plays the most significant role in terms of tourism development while the railway has lower significance.

Great opportunity for tourism development provides the Osijek airport with potential to become a regional airport, including neighbouring countries. There are also three sport airports (Čepin, Sopot, Vukovar).

The Danube as Paneuropean corridor VII is becoming more and more important. For river cruises at the moment the only important port is Vukovar and less Ilok, both on the Danube. There are plans for the inclusion of Osijek port on the Drava to river cruises and building of additional ports on the Danube in Batina, Aljmaš and Ilok.

The organization of tourism in the area is based on the structure designed by the National Tourism Organization of Croatia. There are two county tourism organizations, twelve at towns' level and five at the level of the municipalities.

Within the Danube area there are over 30 TDMOs (tourist agencies), from which only several sell tourist products typical for the area.

In Croatian Danube Area there are many tourist attractions of regional importance, from which many could be upgraded to the national and international importance with appropriate marketing strategy.

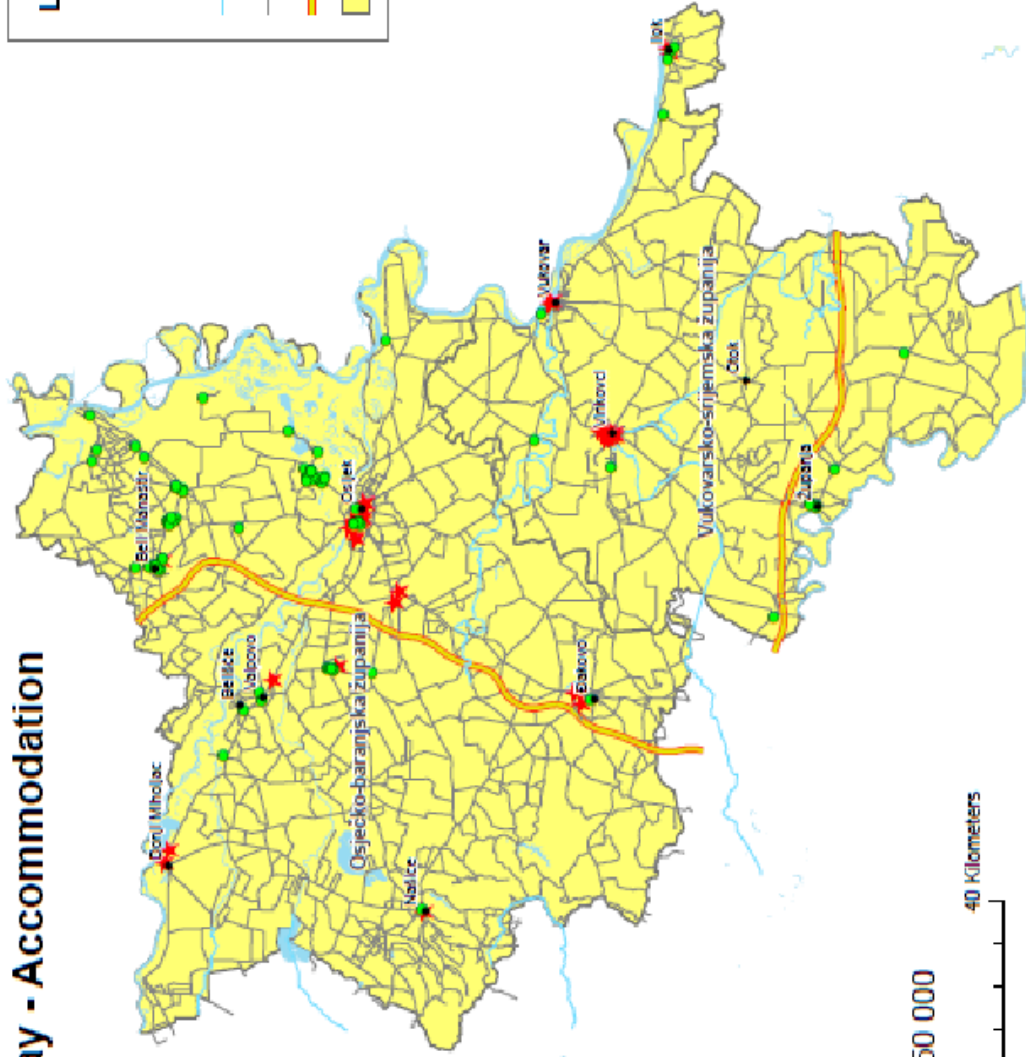
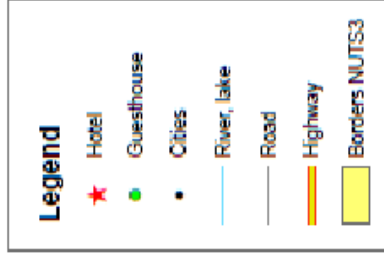
The structure of accommodation

The existing accommodation structure is based on hotels. The majority of beds are in hotels (70%) while others are in similar establishments such as pensions, inns, guest houses, hunting lodges and bed & breakfast. Out of 29 hotels, seven are four stars and 14 three stars. In the whole area there are around 3.330 registered beds (2009), from which 73% are in Osijek-Baranya and 27% in Vukovar-Srijem county. Hotels are mainly concentrated in Osijek as the regional centre and other towns, while small-scale accommodation facilities are situated in rural areas of Baranya and in the settlements along the Danube coast.

The guests in the area are predominantly domestic (75%) and orientated towards business tourism as well as the significant portion of foreign guests.



Datourway - Accommodation



M 1 : 650 000

0 10 20 40 Kilometers



Strengths

Many attractive and well protected natural resources (especially wetlands and oak forests)

Three big rivers Danube, Drava and Sava

Nature park "Kopački rit" as Ramsar site and the area of unique value

Attractive areas suitable for wine tourism

Abundant cultural heritage, especially archaeological, castles/manors and churches

Rich ethnology: gastronomy, customs, traditional events,

Hospitality of the population

Accessibility, especially road connections, airport, railway, Danube, Drava

Good accommodation facilities

Increase in number of enterprises in tourism sector

Increase of educative programs for tourism sector

Diversification of the tourist product

Strengthening of the image of the area as an attractive place for holidays

Existence of the system of TDMOs at regional and local levels

Weaknesses

Lack of the consistent destination management

Weak networking of tourism development stakeholders

Lack of consistent promotion of destination/s

Lack of tourism related services (information, guides, transport)

Lack of education of the tourism workforce

Lack of specialized educational programs for tourist workforce on the regular basis

Long administrative procedures in starting the businesses (e.g. permits)

Complicated legal framework for running the businesses in tourism

Lack of capital for tourism investments

Opportunities

Joining EU as a new interesting destination

Growth trends in continental tourism demand

Hunting, fishing and rural tourism potentials

Revival of unused tourist resources

Financing through EU sources/support

Promotion and branding of special tourist products

Strengthening the image of the „green destination“

Development of educational programs for tourism workforce



Threats

Unfavourable climate for businesses growth-global crisis impact

Trends of decrease in demand for tourism due to global crisis impact

Still existing image of war area (mines)

Unstable macroeconomic climate at national level

Threats of pollution of natural resources by waste waters and floods

Strong foreign competition for the same type of tourism offer

Lack of financial sources for the protection, renewal and upgrade of cultural heritage

Inefficient spatial planning implementation

Lack of strategy for foreign investors outreach

Conflict areas



Tourism vs environment

Tourism sector is not generally perceived as the economic activity that can seriously endanger the environment. On the contrary, tourist potentials of the area is mostly based

on natural attractions, so the tourism can be considered as one of more favourable option for regional development in comparison to other sectors, such as polluting industry.

The co-operation between Croatia and the neighbouring countries in Danube area opens good prospective for the future in the context of the establishment of proposed Mura-Drava-Danube World Biosphere.



The biosphere of protected areas, such as nature park Kopački

rit and similar can be threatened with human activities, such as over-exploitation of surrounding forests or uncontrolled growth of hunting tourism.

Tourism vs human resources

Economic climate in general does not encourage new entrants in the tourism business causing the low level of entrepreneurial activity within the sector. Barriers such demanding requirements in terms of technical standards and human resource capacities prevent new entrants to the tourism sector.



In general, there is a lack of education to support development of tourism sector within the area since existing tourist education system does not meet the needs of the small scale tourist businesses

providing education for low qualification workforce in tourist industry. Some progress has been made through the establishment of the graduate study at the Economic Faculty in Osijek in tourism management.

Tourism vs infrastructure

Lack of the consistent management of the destination/s is one of the barriers for tourism development and capitalization on the tourism potentials of the area.

Other infrastructural barriers to tourism development are unsolved ownership issues over the locations suitable for tourism infrastructure as well as the demanding legislation and procedures.



Evaluation of touristic potential

Croatian Danube area has strong potential for tourism development because of its unique natural resources and rich cultural heritage. The attractions of the area represent a solid basis for the development of eco and rural tourism, cultural-historical and heritage tourism, wine and gastronomy tourism as well as the active tourism such as cycling, canoeing, fishing and hunting, bird watching, photo safari, horse riding, etc. The existing tourist attractions in combination with good geographical position and appropriate infrastructure have not been used enough. Development of continental tourism has been neglected at the national level for a long time since Croatia is perceived as globally attractive sea tourism destination. At the regional level, development of tourism in Croatian Danube Area takes a significant place as one of strategic priorities in development planning documents.

Recent period has been characterized by the implementation of significant number of cross-border and transnational projects as well as the vivid entrepreneurial activity in tourism sector. Strategic focus on tourism development, consistent management and promotion of the destination based upon the changing tourist demand trends, establishment of the network of tourism development stakeholders and improvement of tourism related infrastructure may provide the solid framework for the development of tourism sector in this region.

Prepared within the frame of DATOURWAY - Transnational Strategy for the Sustainable Territorial Development of the Danube Area with special regard to Tourism“ project.

The complete Slovak, Hungarian, Romanian, Serb, Croatian and Bulgarian national analyses are available on page www.datourway.eu