



Handbook to Tourism Projects

in the

Hungary-Croatia IPA Cross-border
Co-operation Programme 2007-2013

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TABLE OF CONTENTS

1. INTRODUCTION	4
1.1 Background of the Handbook	4
1.2 The Handbook and the Guidelines.....	4
1.3 Basic geographical information	5
1.3.1 Zones.....	5
1.3.2 Sub-regions.....	7
2. POLICY AND STRATEGIC FRAMEWORK.....	7
2.1 The IPA Programme	7
2.2 The Hungary-Croatia IPA CBC Programme Document	8
2.3 Action 1.2.1 of the Programme	9
3. THE REGIONAL TOURISM PRODUCT PLAN.....	11
3.1 Presentation of the programme area, descriptive SWOT analysis.....	11
3.2 Overall tourism development concept of the Mura-Drava-Danube river area	21
3.2.1 Market trends	21
3.2.2 Key features of the existing demand.....	23
3.2.3 Characterisation of the supply side.....	23
3.2.4 Strategic assessment of the area as a tourism destination	24
3.2.5 Vision and strategic goals.....	25
3.2.6 Tourism product portfolio.....	26
3.3 Some elements of the marketing strategy and the strategy of sub-regions	34
3.3.1 Theoretical background.....	34
3.3.2 Segmentation, targeting and positioning	35
3.3.3 Competitor analysis of the Mura-Drava-Danube river area.....	36
3.3.4 Objectives.....	39
3.3.5 The product strategies	41
3.4 Specific product plans.....	65
3.4.1 Plan for bicycle networks of the region	65
3.4.2 Plan for water-related types of tourism of the region	70
3.4.3 Plan for hiking and trekking tourism	76
3.4.4 Plan for equestrian tourism	82
3.5 Marketing communication and promotion.....	88
4. INDICATIVE LIST OF ELIGIBLE ACTIVITIES AND PARTNERS PER ACTION	93
4.1 Introduction	93
4.1.1 Excerpts from the Programme Document related to tourism development	93
4.1.2 Instructions to the present Chapter.....	95

4.2 Eligibility rules for Action 1.2.2	96
4.3 Eligibility rules for Action 1.2.3	101
4.4 Eligibility rules for Action 1.2.4	105
4.5 Eligibility rules for Action 1.2.5	107
5. THE THIRD CALL FOR PROPOSALS	109
Annex 1 – Zone maps	110
Annex 2 – List of local governments per Zone and sub-region	113
1) Zone A in Hungary and in Croatia	113
2) Zone B in Hungary	113
3) Zone B in Croatia	115
4) Zone C in Hungary	117
5) Zone C in Croatia	118
Annex 3 – Sub-region maps for Hungary and for Croatia	119
Annex 4 – Sub-regional product matrix	121
Annex 5 – Tourism product portfolio	123
Annex 6 – Segments ranking	125

1. INTRODUCTION

1.1 Background of the Handbook

The Hungary-Croatia IPA Cross-border Co-operation Programme 2007-2013 is being implemented within the 2007-2013 European Union financial framework as a so-called IPA programme. **The strategy of the Programme consists of two Priorities:** 1) Sustainable Environment and Tourism; and 2) Co-operative Economy and Intercommunity Human Resource Development. Both Priorities contain several Areas of intervention and Actions.

Area of intervention 1.2 (Sustainable Tourism in the Mura-Drava-Danube river area) aims at the development of different kinds of environmentally oriented tourism such as eco-, rural and active tourism which are based on the natural and cultural values of the cross-border region. The core element of the complex development envisaged under Area of intervention 1.2 is **the Regional Tourism Product Plan (RTPP)**, constituting Action 1.2.1 of the Programme. The role of the RTPP is to establish a firm strategic direction that tourism development projects can – and have to – address in order to be financed by the Programme.

The Programme launched on 26 March 2009 an open Call for Proposals (CfP) for the drafting of the RTPP. **The cross-border project partnership to carry out the task was selected by the Joint Monitoring Committee (JMC) on 19 October 2009** and the implementation of the 12-month project began on 9 March 2010. Next to the Lead Beneficiary, the University of Pannonia (Hungary), the following organisations were involved as Project Partners: the Regional Development Agency of Slavonia and Baranja (Croatia), the Centre for Regional Studies of the Hungarian Academy of Sciences (Hungary) and the Development Agency of the Municipality of Čakovec (Croatia).

The project (with ID HUHR/0901/1.2.1/0002) to develop the RTPP of the Hungary-Croatia IPA Cross-border Co-operation Programme finished implementation on 8 March 2011. The materials created as outputs of the project are **a comprehensive cross-border GIS database and a planning document of over 600 pages in length.**

1.2 The Handbook and the Guidelines

The aim of the present Handbook is to sum up all relevant programme-level information for the potential Project Partners of joint tourism-development projects under the third CfP of the Programme, launched on ... 2011. The Handbook contains

summary information on the role, content findings, conclusions and recommendations of the RTPP, as well as preliminary key information on the technical content of the CfP.

The Handbook acts **as a supplement to the Guidelines for Applicants (GfA)** of the third CfP. It is the GfA which lays down the detailed rules and procedures encompassing the whole cycle of the application process, including among others the organisational and financial eligibility criteria, the rules of funding, and the project selection and implementation procedures.

Important note: In light of the above, **next to the present Handbook, please be sure to read the GfA as well** since all pieces of application information other than the tourism development specificities are contained in that document!

1.3 Basic geographical information

In the present Chapter you will find information about the basic geographic setup of the planning efforts undertaken in the RTPP project. Please note that the two dimensions of territorial demarcation introduced below will be mentioned many times throughout the Handbook and will have relevance in the selection of the project proposals as well (see Chapter 4).

1.3.1 Zones

The area covered by the RTPP is situated in the south-western part of Hungary and the north-eastern part of Croatia, alongside the Mura, Drava and Danube rivers. The eligible programme area of the Hungary-Croatia IPA CBC Programme, with its 3 Hungarian and 4+4 Croatian counties was, regarding the preliminary development concept set in the 'Technical Specification for Action 1.2.1' (Technical Specification), divided into three zones.

Zone A includes the whole eligible area (see Annex 1, Map 1), settlements that are within 40 km of the rivers belong to **Zone B**, and **Zone C** includes settlements within 5 km distance from the rivers (see Annex 1, Map 2 and 3).

Zone A has an area of 14.230 km² with a population of 1.030.049 (2008) on the Hungarian side and 16.757 km² with a population of 1.234.215 (2008) on the Croatian side. **Zone B** covers a territory of 9.388 km² with a population of 692.213 (2008) on the

Hungarian side and 15.339 km² with a population of 1.190.526 (2008) on the Croatian side. Finally, **Zone C** has an area of 1.905 km² with a population of 96.933 (2008) on the Hungarian side and 5.767 km² with a population of 579.157 (2008) on the Croatian side.

The division into these zones is based on an idea of concentric development, designed to enable the structuring and logical co-ordination of future tourism development projects. The three zones, moving from Zone C towards Zone A, represent growing circles of territorial units involved in the development of different types of joint projects.

At the heart of this concept (embodied by the 'core' of the programme area, Zone C) is **the joint development of tourism according to the principle of sustainability**: the Programme aims at supporting projects which embrace the rivers and other natural values of the cross-border region as assets, instead of concentrating on mass tourism and the unsustainable use of resources. **It is this core idea that results in the special focus on Zone C**: the immediate vicinity of the rivers Mura, Drava and Danube. In these areas which are located 5 km from both sides of the riverbanks, the rivers have immediate impact on their surroundings through their unique riverine eco-systems and landscapes. Since the Programme places strong emphasis on ecotourism, **Zone C has to be the 'centre stage' of project-based development, focusing on water-related types of tourism.**

Moving farther away (40-40 km) from the riverbanks, **in Zone B we find areas that are connected to the rivers with looser ties, however, here the full spectre of sustainable active tourism unfolds** as new strands of activities such as bicycle-, equestrian-, fishing- and hiking-related development possibilities step up. This zone is narrow enough to still retain contact with the three rivers as central tourism product axes, but it is also wide enough to offer plenty of space and a broad offer for the before-mentioned types of tourism.

Finally, regarding Zone A, extending over the whole eligible programme area, **the possibilities for tourism development are entirely opened**, with additional possible development activities emerging, such as cultural tourism based on the heritage and on the possible thematic routes of the whole cross-border region.

Please note that the zones of the programme area will have influence on the recommended content of project proposals. Please take into consideration the references made to Zone A, B and C throughout the Handbook. Please also note that **the compliance of project proposals with the recommended content relevant for the individual zone(s) will be observed during the project selection process.**

1.3.2 Sub-regions

Regarding the analyses and ideas of product development on the Hungarian side the RTPP used as a horizontal basis the **sub-regional classification** of A. Aubert and of the University of Pannonia. **On the Hungarian side** of the programme area (see Annex 3, Map 1), Zone B has been divided into ten sub-regions, whereas **on the Croatian side**, due to differences in territorial administration, the Croatian part of Zone A is divided along the existing NUTS 3 borders of the eligible counties (see Annex 3, Map 2), they provide the background for the balancing of the tourism product portfolio.

As to the ten Hungarian sub-regions, these were delimited based on extensive consultations between the RTPP project partnership and the local stakeholders. The final structure and the division of local governments between the identified sub-regions is the result of workshops held in each of the Hungarian counties.

For the list about the division of local governments according to Zones and sub-regions, please consult Annex 2 of the present Handbook. You can also find a summarised tourism product matrix for both Hungary and Croatia in Annex 4.

Please note that the sub-regions of the programme area will also have influence on the recommended content of project proposals. Please take into consideration the references made to the sub-regions throughout the Handbook. Please also note that **also the compliance of project proposals with the recommended content relevant for the individual sub-region(s) will be observed during the project selection process.**

2. POLICY AND STRATEGIC FRAMEWORK

2.1 The IPA Programme

The **Instrument for Pre-accession Assistance (IPA) Programme** is a financial instrument of the European Union (EU) to support the European accession process of candidate and potential candidate countries to EU membership. (As of 2011, the candidate countries are Croatia, Iceland, Montenegro, the Former Yugoslav Republic of Macedonia and Turkey, whereas the potential candidate countries are Albania, Bosnia

and Herzegovina, Serbia and Kosovo under UBSC Resolution 1244/99). The total funding for pre-accession for the period 2007-2013 is 11,5 billion EUR.

IPA consists of the following **five components**:

- 1) Component I (Transition Assistance and Institution Building) provides financing for institution-building and associated investments.
- 2) *Component II (Cross-Border Co-operation – CBC) supports cross-border co-operation between (potential) candidates and EU Member States.*
- 3) Component III (Regional Development) finances investments and associated technical assistance in areas such as transport, environment and economic cohesion.
- 4) Component IV (Human Resources Development) aims at strengthening human capital through education and training, furthermore at providing help in combating exclusion.
- 5) Component V (Rural Development) contributes to sustainable rural development.

The specific objective of the CBC component is to promote good neighbourly relations, to foster stability, security and prosperity in the mutual interest of all countries concerned, and to encourage their harmonic, balanced and sustainable development.

2.2 The Hungary-Croatia IPA CBC Programme Document

The cross-border co-operation between Croatia and Hungary is supported by the EU within the IPA financial framework introduced above. **The two neighbouring countries laid down their strategic development priorities in a joint Programming Document** called 'Hungary-Croatia IPA Cross-border Co-operation Programme 2007-2013'. The Programme identifies the following **areas of focus for intervention**:

- 1) Increasing the environmental stability and attractiveness of the Drava Valley and surrounding natural and rural areas.
- 2) Creating sustainable joint regional tourism product of the Mura-Drava-Danube zone and in surrounding natural and rural areas.
- 3) Synergetic and co-operative economies of both sides.
- 4) Developing and managing common cultural heritage to promote cultural values, traditions and to develop tourism.

- 5) Utilising advantages of intense cultural and educational interaction between people, educational and civic organisations.

The document has also identified the following **horizontal objectives and guiding principles of implementation** which are considered as prerequisites of the successful implementation of the Programme:

- Maximising cross-border effects in the Programme through creating joint structures or strengthening the co-operation ties over the Hungarian-Croatian border.
- Principles of land use which apply to ensure environmentally sustainable development of land use during implementation of the Programme.
- Promoting Hungarian-Croatian bilingualism which is identified as a basic cultural condition of closer co-operation.
- Ensuring equal opportunities in a comprehensive manner throughout in the Programme. The projects, in accordance with the principles of the EU, must demonstrate their proven efforts to create equal opportunities for genders, ethnicities and people with disabilities.
- Ensuring sustainability in a natural and sensitive border environment. The overall strategic goals and the areas of intervention as well as all projects to be funded by the Programme are to be fully in line with the principle of sustainability as outlined in the Gothenburg Strategy of the EU.

2.3 Action 1.2.1 of the Programme

The project partnership drafting the RTPP was given a set structure as to the chapters of the future document. The areas to be covered and some methodological details were defined in the Technical Specification, published together with the 1st CfP of the Programme on 26 March 2009. Based on this guidance, **the RTPP was prepared along the following modules and tasks:**

Module 1 – Overall concept for the whole eligible area (Zone A)

Module 2 – Database, analysis

- Task 2.a) Set up of GIS basis (for Zones B and C)
- Task 2.b) Data collection (attractions and services)
- Task 2.c) Landscape and spatial analysis, evaluation

Module 3 – Marketing strategy

- Task 3.a) Summary of the overall concept

- Task 3.b) Market analysis
- Task 3.c) Product strategy
- Task 3.d) Strategies for touristic sub-regions
- Task 3.e) Marketing communication and promotion plan
- Task 3.f) Corporate Design manual
- Task 3.g) Actions of investment promotion
- Task 3.h) Tourism information system plan

Module 4 – Plan for bicycle networks of the region

Module 5 – Plan of water related types of tourism

Module 6 – Plan of trekking, hiking

Module 7 – Plan of equestrian tourism

Note: The following Chapter 3 of the Handbook introduces the research conducted during the 12-month joint project and contains the findings and recommendations of the RTPP in a summarised and applicant-friendly format. **Actual indicative lists of eligible activities for projects can be found in Chapter 4** of this document which is of course building on the finding of the RTPP as contained in Chapter 3. **You are encouraged to browse both chapters** when elaborating your project ideas **since the lists of eligible activities per Action in Chapter 4 are admittedly only indicative.**

3. THE REGIONAL TOURISM PRODUCT PLAN

3.1 Presentation of the programme area, descriptive SWOT analysis

Strengths

Destination success factors	Programme area strengths
Existing and potential attractions	<p>Nature based:</p> <ul style="list-style-type: none"> - Extensive and preserved natural resources: the area encompasses vast natural green spaces and, particularly, natural river landscapes; it abounds with water resources including lakes, rivers and thermal wells; it lies along three large Central European rivers: Mura, Drava and Danube; it sports large hunting grounds. - Diversity of natural landscapes: the area encompasses a large diversity of landscapes such as rivers, flatlands, hills and mountains. - Unique natural sites: Lake Balaton, the largest lake in Central Europe; Danube-Drava National Park, Nature Park Kopački rit, Nature Park Papuk, NATURA 2000 network. - Important wine growing regions: major wine growing regions are dispersed throughout the area. <p>Culture based:</p> <ul style="list-style-type: none"> - Authentic rural lifestyle: traditional rural lifestyle is the way of life as seen in folk celebrations, gastronomy, crafts, clothing and architecture. - Hospitality: the traditional welcoming culture of the local population and their positive attitude toward hospitality services are important assets in the development of quality tourism products. - Multicultural character: the area's minority population, which in addition to Croats and Hungarians includes most significantly Czechs, Slovaks, Slovenes, Germans and Roma, is the source of the region's cultural diversity. - Important cultural sites: Pécs UNESCO World Heritage Site and European Capital of Culture 2010 developments; baroque town of Varaždin; a number of small, picturesque towns; a large number of individual protected sites, particularly castles, religious monuments and archaeological sites. <p>Other attractions:</p> <ul style="list-style-type: none"> - Thermal spas: based on the quality of the thermal wells/waters, the spas are a very important feature of the area, also being a major element in the area's image.
Location, accessibility and infrastructure	<ul style="list-style-type: none"> - Proximity to large generating markets: the area's location is close to large domestic (e.g. capital and larger cities) and foreign generating markets (e.g. Austria, Czech Republic, Germany); - Accessibility: the area is easily reached from Budapest and Zagreb by modern highway networks, on the Croatian side it is serviced by international and regional

Destination success factors	Programme area strengths
	airports, and the river ports on the Danube also service international river cruisers.
Tourism supra-structure	<ul style="list-style-type: none"> - Increasing diversity and quality of accommodation: growing diversity of accommodation, including hotels, camps, rural accommodation and stays in private homes; overall growing quality of accommodation and particularly of small, family owned hotels. - Increasing offer of themed route networks: an already significant number of hiking and bicycling paths, as well as wine and routes with other themes traverse and link the area, being a crucial component of a variety of single- or multi-day tours. - Increasing development of quality waterfront facilities: new, quality developments of beaches, F&B (food and beverage) sites, playgrounds and fishing areas are taking place along lakes and rivers. - Increasing number of events: there is a tendency toward quality events with a capability to transcend local and even regional borders.
Networking	<ul style="list-style-type: none"> - Increasing number of destination management companies: there is a steady growth of incoming agencies providing a regional 'experience chain' by integrating a variety of products and services. - Increasing co-operation between tourism sector and local food and wine producers/associations and with local cultural institutions/associations: there is an increasing awareness of the mutual interdependence and consequent co-operation between the tourism sector and producers of local food specialties (meats, pastries, honey, herbs, spirits and wines), but also with traditional crafts producers, music and dance associations and museums. - Increasing co-operation with foreign medical institutions and insurance companies: co-operation with the foreign (namely Austrian and German) medical services sector is an important prerequisite to opening international markets for the area's substantial health, spa and wellness facilities. - Sub-regional co-operation: best practices of sub-regional co-operation exist in the programme area, these may provide incentives for less developed regions. - Product-level networks: increasing co-operation along specific value chains [e.g. rural tourism, health and wellness tourism, MICE (meetings, incentives, conferences and exhibitions), wine and cultural tourism].
Political and business environment	<ul style="list-style-type: none"> - Growing political interest in tourism development in the area: tourism is increasingly seen and supported as an important additional economic activity in this – with the exception of the immediate vicinity of Lake Balaton – traditionally non-tourism region. - Market-oriented regional development: regional development is integrated with marketing policies, ensuring the long-term feasibility of tourism investments. - Flourishing SME (small- and medium enterprises) sector: increasing and professionalising entrepreneurial activity, including greater openness towards innovation. - Increasing incentives for tourism and SME-s: there is an increasing number and variety of state- and international incentive schemes supporting SME-s and particularly tourism development, with additional emphasis being placed on support to non-tourism regions. - Centres of business, commerce, administration, religion and research: the big

Destination success factors	Programme area strengths
	cities in the region (for example Pécs, Kaposvár and Nagykanizsa from the Hungarian side) generate demand for business tourism (including MICE and incentive tourism).
Human resources in tourism	<ul style="list-style-type: none"> - Traditional hospitality of the local population: the traditional hospitality and welcoming culture of local communities is an asset in services- and tourism development. - Positive attitude of local communities towards tourism: there is a general positive attitude towards services and particularly tourism, being perceived to be a welcome additional source of income. - Increasing special training opportunities: there is awareness and, actually, a surge in the offer of training programmes essential to tourism development, namely entrepreneurial training (e.g. vocational skills, marketing), nature conservation, guiding (including eco-guides) and language skills.
Marketing and promotion	<ul style="list-style-type: none"> - Strong and positive image on the domestic markets: the area has a clear and overall positive image on the domestic markets, being perceived as traditional, self-sufficient, hospitable, green and natural, a place of spas, good home-made food and good wine. - Pécs on the Hungarian side is a recognisable marker on the international tourism market as a city of Mediterranean flair and lively culture, especially with being a World Heritage Site and having been the Cultural Capital of Europe in 2010. - Synergies with other sectors: agricultural and industrial products with strong brands on the domestic market support tourism promotion (e.g. Villány wine and Zsolnay china on the Hungarian side). - Increasing availability of themed tourism products: there is a growth of available themed products, namely bicycle-, gastronomy- and wine tours, short culture breaks, events. - Increasing promotional activity: there has been a significant 'push' in the promotion of destinations within the area, as well as the promotion of local values (culture, gastronomy, events, sport activities); co-operative promotional schemes between destinations within parts of the area are also on the rise. - Increasing efforts in destination database development: inventories of attractions, tourism facilities and even an 'eco-inventory' are being compiled into databases as a prerequisite for IT applications (e.g. website content, info points).
Organisation of tourism	<ul style="list-style-type: none"> - Tourism included in county/regional government: although not commanding a department in its own right, the tourism sector is usually represented within Departments of Economics or SME-s. - Broad network of Tourinform Offices in Hungary: tourism information offices available across the Hungarian part of the area represent very important information dissemination points about accommodation, transport, attractions and services. - Established tourism board system in Croatia: there is a functioning and active system of tourism boards (town/municipality and county levels) across the area, charged primarily with destination promotion and, to a lesser extent, with product management. - Market-oriented DMO-s (destination management organisations): there is a transformation going on from public to public-private schemes in destination

Destination success factors	Programme area strengths
	management, allowing for more market orientation, solid funding and independence from political changes.

Weaknesses

Destination success factors	Programme area weaknesses
Existing and potential attractions	<ul style="list-style-type: none"> - Disparity of tourism development within the area: the area encompasses very well known, highly popular and developed attractions (e.g. Lake Balaton, Pécs), as well as large stretches with only sporadically developed attractions and very little tourism activity. - Insufficient market-ready attractions: whether due to a lack of funds, understanding, know-how or owing to inefficiency in attraction development, much of the attraction-generating potential throughout the area remains untapped, many attractions have only local significance. - Insufficient diversity of attractions: this is particularly with reference to the capability to apply innovative approaches to traditional attractions (e.g. creating 'fun', interactive museums), to generate new ones (e.g. theme- and adventure parks), and to adapt attractions to important targeted market segments (e.g. attractions tailored to families with children). - Sporadic management of attractions: lack of professional management skills and, especially, lack of the 'visitor's perspective' in attraction management. - Insufficient and inadequate interpretation of attractions: lack of information and/or lack of 'user-friendly' information (i.e. easy to understand, educational and fun, adapted to targeted customer segment, in several foreign languages), this decreases the perceived quality and attractiveness of the site, facility or event. - Spatial imbalance between attractions and services: some areas with high attraction potential lack a sufficient tourism suprastructure and vice versa, this hinders income generation.
Location, accessibility and infrastructure	<ul style="list-style-type: none"> - Partially poor access: access to the region is poor, especially by air but also by train and highway (except from Budapest by train and motorway). - Relatively poor quality of local road and railroad networks: inferior local traffic infrastructure makes moving around within the area difficult. - Poor tourism signage: too often the sporadic and poorly maintained tourism signage makes getting around the area more difficult and unpleasant. - Low levels of spatial beautification: too often neglected buildings and/or facilities built in disregard of building codes, as well as neglected communal areas especially in smaller villages and rural areas, significantly reduce the attractiveness of such locations and can be a major deterrent to tourism development.
Tourism supra-structure	<ul style="list-style-type: none"> - Lack of quality accommodation: despite increasing diversity and growing accommodation quality, there is still a general lack and a distrust of the quality of available accommodation; particularly lacking are quality facilities with local

Destination success factors	Programme area weaknesses
	<p>charm and atmosphere [e.g. B&B (bed and breakfast) or small hotels]; additionally, there is a low occupancy rate within existing accommodation.</p> <ul style="list-style-type: none"> - There are no campsites currently available in Zone B on the Croatian side of the border. - Lack of quality F&B facilities in Croatia: despite increasing quantity, there is still a lack of quality F&B offer, particularly of the gastronomic offer reflecting traditional local cuisine styles. - Lack of other 'tourism value chain' services: numerous other tourism services (e.g. lake and/or riverside recreation, shopping, culture, information, guides) remain underdeveloped, with the area offering only an elementary tourism value chain; there is a lack of innovation and a lack of appeal particularly for special interest guests. - Overtly medical character of thermal spas in Croatia (with a very limited offer for 'non-patients'), as well as legal regulation, outdated facilities and lack of investments are at this point practically annulling the thermal water/spa assets as a tourism industry resource. - Sporadic and rudimentary offer of rural tourism: despite ever increasing support and incentives, any fully-fledged rural tourism offer (e.g. farm stays with lodging, F&B, recreation) is still scarce; there is a distrust of quality of accommodation and services offered. - Low service quality: still insufficient knowledge of services and lacking understanding of visitor expectations on the part of potential service providers result in generally low service quality. - Lack of specialisation and profiling: especially the spa sector suffers from the lack of innovative specialisation which results in intraregional competition and low effectiveness. - Limited provision of services along the rivers in Hungary: the river belts offer very few services, especially along the Drava and the Mura quality catering and programmes (including the interpretation of attractions) are missing.
Networking	<ul style="list-style-type: none"> - Insufficient co-operation: despite cases to the contrary, there is still overall insufficient co-operation on practically all levels: public-public, public-private, private-private; only sporadically occurring partnerships within the tourism sector itself, between the tourism sector (wholesales and retailers) and local food-, wine- and craft producers, as well as with cultural institutions result in limited capability of establishing tourism value chains.
Political and business environment	<ul style="list-style-type: none"> - Lack of 'tourism thinking' and confidence in the tourism sector: despite growing interest and support of tourism as the 'new opportunity', there is insufficient understanding of the implications of this service industry and real (as opposed to 'lip service') confidence in it, both on the part of political and entrepreneurial structures. - Limited capabilities for facilitating start-up projects: an underdeveloped financial sector and the underfinanced local governments are not in a position to provide stable financing or subsidising schemes to tourism-related start-up projects; funds for entrepreneurial initiatives are limited; interest of foreign investors is limited; there is a significant discrepancy between large and small towns' capability in attracting or initiating projects, with the smaller administrative units 'being left out'.

Destination success factors	Programme area weaknesses
	<ul style="list-style-type: none"> - Investment potential not realised: due to the world financial crisis and the poor political and administrative preparation of the Cultural Capital of Europe programme in Hungary, the majority of private investments into the tourism sector has been cancelled, with especially hotel projects remaining in the pipeline; the impact on the area's tourism sector also lags behind. - Restrictive regulatory environment in Croatia: overwhelming and contradictory regulations, particularly in reference to tourism services on farms and in thermal/spa 'special hospitals', are restricting tourism activity and future development.
Human resources in tourism	<ul style="list-style-type: none"> - Lack of well trained management and line staff in tourism: labour force with training in the tourism industry and particularly with management skills is scarce in the area; contributing factors are the insufficient mobility of labour, particularly to rural areas, as well as a generally decreasing interest in hospitality professions (e.g. cooks, waiters, chambermaids); the innate hospitality of the local population does not automatically translate into a visitor-friendly approach. - Lack of trained tourism supportive staff: labour force with training in tourism supporting skills, particularly those of importance in the area (e.g. ecotourism, project management, destination management and marketing) is scarce. - Poor command of foreign languages: foreign language skills among tourism services staff and the local population in general are still inadequate.
Marketing and promotion	<ul style="list-style-type: none"> - Lack of a strategic marketing framework: strategic tourism marketing plans for the destinations making up the area have not been tackled (the Marketing Strategy being drawn up as part of Module 3 of the RTPP project is the first such attempt). - Lack of clear targeting: many destination areas and tourism enterprises are not able to clearly define their target groups and thus to cater for their needs, instead a 'something-for-all' approach is typical, resulting in ineffective and conflicting image and service components. - Lack of marketing and sales know-how: lack of a 'guest perspective', of understanding market trends, of potential for special interest products, of packaging, of selling and e-marketing. - Lack of joint promotional and sales efforts: despite sporadic successful attempts at co-operative promotional efforts, the general approach is still 'every region/county for itself', this results in lost opportunities at image building that would stem from unified budgets and messages.
Organisation of tourism	<ul style="list-style-type: none"> - Severe understaffing of tourism-related bodies: staff responsible for tourism within regional/local governments, as well as staff of the tourism board systems are typically very small (often 'one-man-show' like), limiting tourism development or promotional efforts. - Lack of destination management function: lack of organisational framework and know-how supporting this relatively new function.

Opportunities

Destination success factors	Programme area opportunities
Existing and potential attractions	<ul style="list-style-type: none"> - Re-cultivation: severe environmentally degraded areas may be attractive for tourism in the future after re-cultivation. - Town and villagescape renewal: urban regeneration and villagescape renewal projects may enhance the attractiveness of the area. - Pécs events to continue: events which have been part of the 2010 Cultural Capital of Europe year (and the previous years) become more widely known and attractive as they establish. - Synergy-oriented development of new attractions: parallel attraction development projects in various fields contribute to the general attractiveness of the region as the experience offer reaches a critical level. - Access valorises existing attractions: with the development of new access routes/gateways, existing attractions may become more popular as the cost (time) of access decreases.
Location, accessibility and infrastructure	<ul style="list-style-type: none"> - Close potential urban generating areas: a number of potential generating areas lie within easy reach, visitors from urban areas (Vienna, Graz, Bratislava, Prague) may be interested in unspoilt nature, authentic culture and gastronomy. - Access to local and regional generating markets: the area may be co-marketed on local and regional markets (e.g. regional one-day visits and local leisure services); this would increase return on investment into events, spas, visitors centres and catering facilities, thus would make the region more attractive to investors. - Croatia's access to the EU and especially to the Schengen Zone: this would (will) cease administrative barriers to visiting the core programme area (the river belts). - Cross-border transport development: development of cross-border transport schemes (both routes and services) could foster the integration of the Hungarian and Croatian tourism sectors into one single destination, enabling the division of labour among these sides and the decreasing of spatial inequalities (e.g. by increasing occupancy rates of the Croatian accommodation sector through the pull of Hungarian attractions). - M9 motorway development in Hungary: the external motorway belt will link the project area to the Austrian motorway network and thus to Western European generating markets. - Danube Strategy: the EU has been developing a common Danube Strategy which aims at exploiting the potentials of one of Europe's main rivers; policies stemming from this might impact on river cruise tourism towards Southern Hungary, Serbia and Romania, increasing the number of ships and visitors calling at the port of Mohács.
Tourism supra-structure	<ul style="list-style-type: none"> - Making up cancelled private investments after the crisis: the recovery from the world economic crisis will make investments into new hotels and other establishments more attractive, this may then lead to the realisation of a number of hotels currently in the pipeline (primarily in Pécs and on spa locations); - Specialisation: careful selection of target groups and innovative service- and

Destination success factors	Programme area opportunities
	image development may contribute to a more colourful tourism offer (e.g. spas with different characters may attract tourist for a longer stay).
Networking	<ul style="list-style-type: none"> - Developing and deepening sub-regional networks: with an increasing number of ties among sub-regional actors and through deeper co-operation the tourism products may become more integrated and thus more attractive to potential visitors. - Product-level networks: co-operation across sub-regions may enhance the image of the region as a whole by offering coherent experiences across large territorial units (e.g. long-distance bike trails, gastronomy thematic routes and the like). - Danube-Drava-Sava Euroregion co-operation: if the development of the area becomes part of a larger Euroregion, it will be more recognisable and also more funds may be available.
Political and business environment	<ul style="list-style-type: none"> - Accession of Croatia to the EU: Croatian EU accession allows for more joint cross-border initiatives and may lead to higher EU funding for the two countries' co-operation during the next budgetary period (from 2014 on). - Economic recovery: economic boost will have a multiplied effect on vacation- and business tourism demand through the fast increase of discretionary income.
Human resources in tourism	<ul style="list-style-type: none"> - Dynamically increasing command of foreign languages: both demand from the labour market and the school and higher education requirements contribute to the young people speaking more foreign languages. As a consequence a labour force able to deal with foreign guests will become available.
Marketing and promotion	<ul style="list-style-type: none"> - Further enhancing the Pécs image: a more conscious use of the World Heritage of Pécs and of its former European Cultural Capital status may enable the reaching out to new markets (given that access is developed). - Developing sub-regional image: market visibility could be increased through the development of coherent, branded images of the sub-regions and via an overall regional umbrella brand. - Marketing actions reach critical levels of visibility: if the marketing activity (both the funds available and the quality of the actions carried out) develops, it may reach the critical level necessary to raise awareness of the area and its tourism product. - New technologies: Currently a number of new solutions in e-marketing and m-marketing emerge on the market; if professionally applied, these may provide opportunities to effectively manage co-operative tourism development and branding.
Organisation of tourism	<ul style="list-style-type: none"> - DMO professionalisation: the establishment of private-public destination management organisations is a relatively new development on the Hungarian side; if these bodies will be able to build effective structures and to work professionally, they may become crucial actors enhancing the overall competitiveness in the domestic and international tourism markets. - Local incoming operators: a few local incoming tour operators have been established in the area during the last couple of years; they may represent an important potential in attracting visitors with labour-intensive, special interest

Destination success factors	Programme area opportunities
	<p>tourism products (e.g. incentive tourism ecotourism, cultural tourism, gastronomy tourism etc.).</p> <ul style="list-style-type: none"> - Western European operators increasing interest in the area: the overall image of the area may be developed with generating market tour operators (predominantly special interest tourism operators, e.g. Studiosus) who could become interested in the regional tourism offer.

Threats

Destination success factors	Programme area threats
Existing and potential attractions	<ul style="list-style-type: none"> - Poverty hinders attraction development and use: poverty and the resulting social problems in rural areas may hinder tourism development as other development objectives will be ranked higher. - Industrial heritage disappears: former industrial buildings and locations tend to deteriorate, some of these are demolished or re-developed in a less favourable way as regards tourism, in this way declining the area's tourism potential. - Minority cultures disappear: German and Serbian minority cultures may become less authentic and also more commercialised in some cases, as new generations live a more modern and culturally integrated lifestyle (see e.g. the loss of dialects). - Newly developed attractions may deteriorate fast: if new public attractions' management schemes are not well planned or missing this could result in rapid deterioration.
Location, accessibility and infrastructure	<ul style="list-style-type: none"> - Increasing intra-regional spatial inequalities: the sub-regions of the area develop at highly different paces which may present social and economic tensions if not treated well [see e.g. the Siklós-Villány sub-region vs. the neighbouring Lower Drava (Sellye) sub-region]. - Delays in M9 motorway development: due to limited funds this project may be realised during the 2020's only, resulting in missed opportunities and the region's lagging behind after competitors. - Increasing fuel costs: constantly increasing fuel costs hinder access from generating areas especially; this impact may be especially strong with short visits (thus the newly gained opportunity to serve as an excursion destination may be lost quickly).
Tourism supra-structure	<ul style="list-style-type: none"> - Investments fall away: if demand remains low, planned investments will not become feasible and thus hotel and projects will be stuck in the pipeline.
Networking	<ul style="list-style-type: none"> - Vested interests undermine co-operation: the recently introduced DMO scheme is based on the assumption that actors will be able to give up vested interests – if this is not the case, such schemes will not be successful and will not be able to deepen co-operation.

Destination success factors	Programme area threats
	<ul style="list-style-type: none"> - Stacked cross-border and interregional co-operation: too strong local and sub-regional interests may become barriers to cross-border and interregional co-operation.
Political and business environment	<ul style="list-style-type: none"> - West Balkans political situation: political tension in Bosnia and Herzegovina may be threatening for Western European tourists. - Parallel developments: if development plans are not co-ordinated on the intra-/inter-regional and cross-border level, synergic effects may fall away due to a number of parallel developments (as is the case currently with spa development).
Human resources in tourism	<ul style="list-style-type: none"> - Disappointment in tourism as an agent of development: if tourism cannot provide substantial contribution to income and quality of life the current supportive atmosphere may become less favourable, resulting in less public funds for the development of this sector. - Low motivation to study tourism: if unemployment rates remain high and tourism is not seen as a potential employment sector, the motivation of the potential labour force to become tourism professionals will cease or at least decrease, which in turn may lead to a less professional tourism offer. - Migration of skilled labour: if no employment opportunities in tourism open up, skilled labour may migrate to more successful destinations or may look for employment in other sectors.
Marketing and promotion	<ul style="list-style-type: none"> - Decreasing prestige: the current prestige of some of the sub-regions may deteriorate in the future if they cannot provide constant innovations in order to remain trendy and fashionable. - Lagging behind: there is a danger that other competitors develop faster and more successfully, both on the domestic and the international scene. - Contradictory messages: the effectiveness of tourism marketing may decrease if sub-regional and regional actors are unable to co-ordinate marketing messages. - No successful use of new technologies and schemes: if marketing organisations are not able to apply new network-oriented attitudes and technologies then they will miss the most effective current marketing tools.
Organisation of tourism	<ul style="list-style-type: none"> - No tour operator interest in the region: the main threat in this field is that the image of the region does not become strong enough for generating area tour operators to become interested in programming the area. - DMO-s ineffective: if the newly established DMO-s are not able to consequently apply the effectiveness principle and to employ highly professional – if necessary external – staff they will not reach the level of impact necessary to attract more visitors.

3.2 Overall tourism development concept of the Mura-Drava-Danube river area

3.2.1 Market trends

Market trends provide the framework for tourism development. Especially important are the subtle, slowly evolving social trends affecting consumer behaviour. An aging population, changing work patterns, growing environmental consciousness, the shift towards post-materialistic social values and the rapid pace of technological innovation are creating **the 'new tourist'**.

- The 'new tourist' prefers travel experiences which are meaningful on a personal level, which are educational in a fun way and which can **contribute to personal growth**. The 'new tourist' wants to buy experiences, wants to be engaged and enjoys participating. It is important to both see and experience a destination. It is interesting to taste local wines, but picking grapes at a great winery will be long remembered.
- **The search for balance** present in everyday life is carried over to holiday time as well. The 'new tourist' is likely to buy products, services and experiences which restore balance in a physical or spiritual sense. They are also more likely to select destinations implementing sustainability concepts and demonstrating their environmental consciousness.
- The emphasis on healthy living is being translated also into **healthy vacationing**. This entails not only the demand for specialised health tourism products such as spas and wellness, but even more so the expectation of 'healthy lifestyle' elements to be part of all tourism products ranging from fresh, local ingredients and sorts of food being served, to the availability of physical activities.
- The 'new tourist' will likely prefer travel itineraries which have been customised to suit their **individual needs or**, even better, the ones they are able to select and put together by themselves.

Tourism destination development has to meet the challenge of satisfying the 'new tourist's' need for **meaningful experiences**.

Very rapidly changing technologies continuously impact the tourism industry, influencing every phase of the travel cycle from pre-visit communication, through booking and the actual travel itself, to loyalty programmes and other post-visit remembering services. **The internet has become one of the major sources of travel**

related information. It is also a major communication channel not only between consumers and service providers, but increasingly also between consumers themselves with user-generated content as one of the most powerful forces driving travel planning today. Innovations in transportation technology are also impacting the tourism industry in various important ways.

Trends and success factors in destination marketing are:

- **Clustering** – Pooling sites together by clustering several smaller attractions around a major one, or by clustering a diverse set of attractions into a compact destination, or by clustering dispersed sites into itineraries. These methods may collectively provide enough interest to attract a critical mass of visitors.
- **Establishing a value chain** – In addition to providing attraction(s) and accommodation(s) as elements satisfying the basic needs of visitors, the value chain of tourism destinations will typically include products and services such as local F&B, shopping, information, tours, guides, transport etc.
- **Partnership** – Destination development is about the forging of partnerships. Co-operation efforts between tourism service providers and all other destination services, ranging from regulatory bodies to medical services, from banking to the utilities sector, are essential to forming and maintaining successful tourism destinations.
- **Branding** – The branding of tourism destinations is one of the dominant trends in destination marketing today. A strong destination brand, preferably of high emotional value, is seen as significantly contributing to destination image and recognisability, which, considering the extremely competitive tourism environment, is of utmost importance to destination choice.
- **E-marketing** – Destination websites must be optimised for the best possible positioning on search engines, they must strive to be 'sticky' and to keep the visitor from moving on to another site for as long as possible, they must be convincing in face of comments generated by other users and they should offer 'within three clicks of the mouse' the possibility to go from information to purchasing action.
- **Sustainability** – Using natural and cultural resources in a manner which will preserve them for future generations is a basic development premise today. Sustainability is as much about establishing rules of conduct as it is about developing understanding. In the latter sense, tourist participation and especially heritage interpretation that is understandable and enjoyable but, at the same time, a learning experience as well has become a prerequisite of successful destination development.

3.2.2 Key features of the existing demand

There are some major differences between the Hungarian and the Croatian parts of the programme area. Most significantly, **the Hungarian side, incorporating parts of Lake Balaton, is in fact one of Hungary's major tourism destinations**, attracting six times as many overnights as the Croatian side which, in tourism terms, is presently an underdeveloped region playing only a minor role in the country's tourism industry. Typical for a water resources based holiday region, **the demand in the Hungarian part is highly seasonal** (June, July and August account for 52% of overnights). The length of stay (standing above 3,5 nights) is above the national average and, although the domestic market is dominant (two-thirds of the overnights), there is a substantial share of foreign guests.

In Croatia, on the other hand, the demand is evenly spread through the year, the length of stay (standing at 2,4 nights) is shorter than the national average and the area is heavily dependent on domestic visitors – they generate three quarters (74%) of the overnights demand in commercial accommodation. The domestic market includes substantial numbers of one-day visitors. **By far the main motive for travel to the area is VFR (visiting friends and relatives)**, in Hungary followed by beach holidays, wellness, nature trips and city breaks, while in Croatia additional motives include short breaks in towns, nature trips and visits to events and festivals.

Perceptions and images, whether in fact true or not, have a proven high correlation with the consumers' likelihood to buy a product. **The perceptions of the area are positive.** These are images are in Hungary of Lake Balaton, the culturally renowned city of Pécs, widely recognised as the European Capital of Cultural in the year 2010, the unspoiled natural river habitats, the vast plains and the positive connotations of the hearty, hospitable and traditional rural landscapes. It is fair to say, however, that apart from the 'beacons' such as Lake Balaton and Pécs, **the images of the area and especially its rural and natural characteristics get vaguer as the distance between the area and the potential consumers increases.**

3.2.3 Characterisation of the supply side

The Mura-Drava-Danube river area is potentially an outstanding tourism destination. It commands a good location in relative proximity to very important national and international tourism generating markets. On the national level these are the capital cities of Budapest and Zagreb, whereas on regional level the main travel generators are Pécs, Kaposvár and Osijek. In relation to international tourism flows, the area is part of the very potent Central European market which includes some of Europe's major travel generating nations such as Germany, Austria, Poland and the Czech Republic. **The area is easily accessible by a modern system of highways**, it is

served by international and regional airports and also by river ports harbouring international river cruisers. The area's overall accessibility is diminished by a relatively poor local road and railroad infrastructure which curtails movement within it.

The accommodations sector is diversifying in terms of type and quality of facilities offered. **On the Hungarian side of the area the private accommodation sector commands the largest share of the capacity (62%),** while the offer of hotels and other collective establishments is significantly smaller (19% each). Total commercial accommodation capacity **in the Croatian part of the area** is significantly smaller than on the Hungarian side, amounting to 8.399 beds. **Slightly over a half (55%) of that capacity is in hotels,** almost a third (32%) in other collective accommodation, namely in pensions, inns, mountain lodges and such smaller facilities, while the private accommodation sector offers only a small share of the total capacity (7%).

Most importantly, the programme area is a place of remarkable natural and cultural attractions. These range from Lake Balaton as Central Europe's largest lake, the arresting beauty of its rivers and particularly the still largely natural Drava, the vast fertile plains, vineyards and healing thermal waters, to picturesque baroque towns, impressive castles and manor houses dispersed throughout and the rich, still very much lived rural folk culture. **In terms of both nature and culture, this is a very diverse and a very authentic landscape.** Going beyond its natural and cultural endowments by placing additional emphasis on visitor-oriented services aligned with market trends and sensitive to consumer needs for health, balance and self-fulfilment, the area has the potential of developing into a competitive tourism destination. Its authenticity, spas, wines and the trails connecting it can all become strong motives for a visit.

3.2.4 Strategic assessment of the area as a tourism destination

The Mura-Drava-Danube river area is a region with undisputedly significant tourism potential. Endowed with unique natural and cultural attractions, it is an area where tourism development opportunities are being recognised and slowly acted upon with a growing number of initiatives in the domains of tourism suprastructure, networking, human resources, marketing and organisation of tourism.

Critically reviewing the area's identified strengths against market trends relevant to tourism development, **it is possible to single out the area's following strategic advantages:**

- extensive, unique, preserved natural resources and unique cultural heritage sites,
- authenticity of a multicultural rural society,

- proximity and accessibility to large generating markets, and
- potential for diverse tourism products meeting the needs and expectations of varied market segments.

Similarly, the analysed area weaknesses point to a number of strategic disadvantages:

- lack of understanding and confidence in the tourism sector,
- lack of management know-how,
- limited capabilities for facilitating start-up projects in tourism, and
- understaffing of tourism governing/implementing bodies.

Clearly, tourism development, although typically based on heritage and location assets, **needs to be driven in today's competitive environment by knowledge, innovation and commitment**. Aligning the area's identified potential (strategic advantages) with skills-based resources (presently these are strategic disadvantages) remains the area's tourism development challenge.

3.2.5 Vision and strategic goals

The vision of a tourism destination is a mental picture of the destination's desirable future which in case of the programme area can be formulated as the following:

The Mura-Drava-Danube river area will be a year-round, diverse, service oriented quality destination committed to authenticity and sustainability.

The destination vision is a compass guiding the local community in the setting of tourism development goals and in subsequently securing the resources needed to achieve them.

The strategic tourism development goals of the area represent long-term targets of tourism development and are as follows:

- to develop a tourism supportive environment,
- to develop a skilled labour force,
- to develop competitive tourism products,
- to develop an integrated communications mix,
- to reinforce and further develop an attractive destination image, and
- to establish a tourism product portfolio of the area.

The product portfolio of the area is structured so as to offer different potential customer segments a diversity of possible experiences. It is to be developed in a manner to meet the competitive quality criteria, namely meeting guest expectations while, at the same time, remaining committed to safeguarding the area's authenticity and sustainability premises.

3.2.6 Tourism product portfolio

Rural tourism – Rural tourism refers to trips and holidays in a rural setting. The distinguishing feature of rural tourism is the experience of life in the countryside. It can include visitor participation in the day-to-day activities, in the traditions and lifestyle of the local population. It can also include agro-tourism which refers to actual stays on farms and the participation in farm life. During rural holidays it is possible and likely that visitors will engage in some of the other tourism products offered in and around their chosen. **Product success factors:**

- Preservation and offer of authenticity: in architecture, interior design, food, activities, celebrations and events.
- Holidays offering content, e.g. activities on farms or in vineyards, possibilities to engage in other tourism products such as hiking, bicycling, fishing, etc. Availability of creative all-inclusive packages which include transportation, accommodation, food and series of activities.
- Simple, comfortable accommodation, preferably B&B, small family-style pensions or hotels, farm stays. In case of the latter the visitors must be assured of the availability of modern amenities.
- Availability of local F&B specialties.
- Availability of tourism suprastructure (e.g. trails, information, equipment rental, guides etc.) for other related tourism products that holidaymakers can engage in sporadically (e.g. hiking and trekking, bicycling, culture tourism, health and wellness etc.).

Hiking and trekking – Hiking is an outdoor activity consisting of walking, climbing or mountaineering in natural environments, often on hiking trails. Trekking is a journey undertaken on foot and, unlike hiking, it does not necessarily entail climbing or mountaineering but just days of walking. The consumers' main motives are physical activity in a natural environment, rest and relaxation and a healthy lifestyle. **Product success factors:**

- Availability of hiking and trekking trails with varying levels of difficulty to suit the needs and capabilities of different age groups of visitors. Especially important is the availability of shorter trails with rest places for the needs of older persons and families with children.
- Availability of precise hiking maps; frequent signage; availability of accurate information about each route, including level of difficulty, duration, available facilities along the route (e.g. F&B, lodging), available attractions.
- Availability of sightseeing points and adequate spatial interpretation.
- Availability of picnic areas; availability of mountain lodges with lodging, food offer, public toilets.
- If hiking entails extraordinarily long routes, availability of food delivery, luggage transportation and guiding are also important.
- Organisation of itineraries with accents on special features.
- Accessibility from main roads, availability of safe parking areas.

Bicycling – Bicycling tourism can be defined as trips where bicycling is the main activity undertaken, being both the purpose of the trip and the mode of transportation to and/or between destinations. Forecasts show the number of trips in Europe focused on bicycling will increase by 6% to 12% in the next ten years. Main motives are engaging in healthy physical activity, spending time outdoors, recreation and relaxation (including mental relaxation), new challenges and, especially for the younger segments, 'high adrenalin' challenges. **Product success factors:**

- Availability of safe and maintained routes. For recreational cyclists, also the availability of shorter, circular and less arduous routes, preferably with no (or low) other traffic, as well as thematic routes with attractions along the route and views of picturesque landscapes.
- Availability of accurate information about each route, including level of difficulty, duration, available facilities (e.g. lodging, F&B), available attractions.
- Availability of services along the route, namely food, lodging, repairs, transfer of equipment and luggage (if talking about a non-circular route).
- Simple and comfortable accommodation, preferably B&B, small family-style hotels or pensions, camping grounds. Accommodation facilities catering to cyclists should offer facilities for bicycles (e.g. appropriate and safe storage, possibility to wash the bikes and to perform small maintenance activities on them).
- Availability of bicycle signage.
- Availability of precise maps.

- Targeted marketing through specialised channels (print media, internet, specialised agents).

Fishing – Recreational fishing (angling) in rivers and lakes is one of the most popular types of passive sport activities in Europe. The European Anglers' Alliance estimates there are 25 million active fishermen in Europe as a whole and approximately 6 million in Central Europe. Main motives are the opportunity to spend time in a natural environment, being with friends, relaxation, catching fish for personal consumption.

Product success factors:

- Preserved natural sites.
- Developed fishing infrastructure (e.g. piers, platforms, storage coolers) for passionate sport fishermen.
- Availability of fishing-related services, namely boat and equipment rentals. Availability of creative packages which include training, permits and accommodation.
- Accessibility of fishing sites from main roads, availability of safe parking areas.
- Availability of maps, availability of up-to-date information (e.g. on the internet, in information offices).
- Availability of other sport-, entertainment- and F&B opportunities at the destination. Availability of simple accommodation (e.g. B&B, small family-style hotels).
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Hunting – Hunting tourism is leisure travel undertaken for the purpose of hunting game animals, either in the wild or on tracts of land created specially for hunting. In the EU, Switzerland and Norway there are approximately 6,4 million registered hunters and estimates show that from 20% to 30% of them travel to hunt. **Product success**

factors:

- Preserved natural sites and availability of game.
- Developed hunting infrastructure (e.g. shelters, viewpoints, transportation vehicles, refrigeration storage) and services (e.g. guides, up-to-date information).
- Availability of simple accommodation (e.g. hunting lodges, B&B, small family-style hotels) and hearty food (including the possibility for the travelling party to prepare the food themselves).

- Availability of all-inclusive packages which include permits, guides, transportation, accommodation, food and catering.
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Water based sports – Water based sports in the context of the Mura-Drava-Danube river area refer primarily to canoeing, kayaking and paddling on the rivers themselves. Main motives are engaging in activities which are physically demanding and challenging, feeling the excitement and adrenalin, the opportunity to spend time in a natural environment, being with friends. **Product success factors:**

- Natural, challenging river flows. Preserved natural sites.
- Developed infrastructure (e.g. access points along rivers, moorings, piers).
- Availability of related services, namely boat and equipment rentals, luggage and equipment transfers, food delivery. Availability of creative packages which include itineraries, permits and accommodation.
- Availability of safe parking areas.
- Availability of maps, availability of up-to-date information (e.g. on the internet, in information offices).
- Availability of other sport, entertainment and F&B opportunities at the destination. Availability of simple accommodation (e.g. B&B, small family-style hotels, camps).
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Equestrian tourism – Equestrian tourism encompasses all equestrian activities undertaken away from home while staying in holiday accommodation and it usually includes training courses, sightseeing at stables, therapeutic riding courses and vacation tours on horseback etc. Consumers are motivated by the love for animals and for nature, as well as the possibility to enjoy nature in a simple, yet direct way. **Product success factors:**

- Availability of riding trails in preserved and beautiful natural surroundings; attractive sites along trails; attractive and picturesque rural landscape.
- Availability of professionally managed riding centres.
- Availability of related services (e.g. different training courses, guides, rental of riding equipment, transportation of equipment, general transportation services).

- Availability of professional and specialised travel services (information, bookings, itineraries); also availability of all-inclusive packages which include guides, transportation, accommodation, food and catering.
- Availability of entertainment and F&B opportunities at the destination. Availability of quality accommodation with an emphasis on 'rural atmosphere' (e.g. farm stays, B&B, pensions and inns, small family-style hotels). Availability of stables as part of the accommodation or in the vicinity. Proximity of accommodation to riding trails.
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Bird and animal watching – Bird watching and/or animal watching is the observation and study of birds and animals with the naked eye or through binoculars. Over the past 30 years travel with the purpose of engaging in these activities has grown significantly. Main motives of travel are the watching of birds, flora and fauna and learning about them and their habitats, being outdoors in an unspoiled natural environment, learning about the natural and cultural heritage of the destination, rest and relaxation. **Product success factors:**

- Developed bird/animal watching infrastructure (e.g. shelters, platforms, viewpoints, transportation vehicles, rental of binoculars).
- Interpretation centres or other information dissemination centres where it is possible to get up-to-date information, to participate in educational activities and to meet with guides.
- Signs and spatial interpretation on site.
- Guide services (knowledgeable about birds, animals and the local natural environment; capable of guiding in foreign languages).
- Travel guides/books specialised for bird/animal watchers. Availability of precise maps with bird/animal watching sites and locations.
- Availability of professional and specialised travel services (information, bookings, itineraries); also availability of all-inclusive packages which include guides, transportation, accommodation, food and catering.
- Availability of entertainment and F&B opportunities at the destination. Availability of quality accommodation (e.g. comfortable quality farm stays, B&B, small family-style hotels).
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Ecotourism – Although there is still some confusion as to the exact scope of ecotourism, it is generally understood as ecologically sensitive travel to relatively undisturbed natural locations. Accepting the IUCN definition, we determine ecotourism *‘an environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features – both past and present) that promotes conservation, has low negative visitor impact and provides for beneficially active socio-economic involvement of local populations’*. The emphasis on the educational component of the trip is very pronounced.

With the growing public awareness of the environment and the need to protect it, **ecotourism is expected to continue growing in popularity**. Main motives of travel are to experience and appreciate the natural environment. Protected areas are the main reason for selecting a travel destination. **Product success factors:**

- Environmental responsibility of operators (e.g. accommodations, F&B, tour-operators) and adoption of the ‘reduce, re-use and recycle’ principles of environmental consciousness. A published code of conduct by the operators manifesting their commitment to the environment.
- Interpretation centres or other information dissemination centres where it is possible to get up-to-date information, to participate in educational activities and to meet with guides.
- Signs and spatial interpretation on site.
- Guide services (knowledgeable about the natural environment; capable of guiding in foreign languages).
- Travel guides/books specialised for nature lovers. Availability of precise maps with unique or important sites and locations.
- Availability of professional and specialised travel services (information, bookings, itineraries). Also availability of all-inclusive packages which include guides, transportation, accommodation, food.
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Culture tourism – Culture tourism refers to visits from outside the host community motivated wholly or in part by the interest in the historical-, artistic-, heritage- and lifestyle attractions of a destination. **It is a large and growing market**, with WTO (World Tourism Organisation) estimates showing that approximately 37% of all international trips include a cultural component. Growth prospects are supported by an increasing interest in authenticity and in experiencing the ‘real’ destination, as well as by declining airline fares making culturally significant destinations increasingly more accessible. **Popularity of shorter culture breaks and city tours encompassing**

several cities is an obvious trend. Main motives of travel are new experiences, learning about the cultural heritage of a destination, experiencing different lifestyles.

Product success factors:

- Signage leading to attractions, easy access, parking.
- Spatial interpretation on site (even if attraction is in poor state or under repair). Also written information about significance of site. All information also in foreign language(s).
- Guide services (capable of guiding in foreign languages).
- Availability of routes, themed routes and suggested itineraries.
- Availability of professional and specialised travel services (information, bookings, tours). Also availability of all-inclusive packages which include guides, transportation, accommodation.
- Availability of entertainment and F&B opportunities in the destination. Availability of quality accommodation (e.g. B&B, small family-style hotels and also larger international-style hotels).
- Targeted marketing through specialised channels (print media, internet, specialised agents).

Health and wellness – Health and wellness tourism encompasses travel motivated by maintaining and improving one's health. It can range from travel to medical clinics for the purposes of a medical intervention or cure (e.g. minor plastic surgery, dental work, cure for chronic medical conditions) to travel for the purposes of fitness or beauty treatments at a wellness centre. Research indicates that approximately 15% of European international trips are motivated by health reasons; furthermore forecasting **health tourism will become a major tourism product.** Main motives of travel include maintaining and/or improving one's physical and mental health. Accompanying educational programmes on nutrition, beauty and stress management are also popular. **Project success factors:**

- Quality, modern equipment.
- Skilled, licensed and guest-oriented staff.
- Creativity and continuing innovation of the products and services offered.
- Atmosphere at the centre, appealing and calming all senses.
- Proven health benefits of the destination's 'natural factors' (e.g. thermal waters, climate, air characteristics etc.).
- Supportive destination development compatible with a 'healthy' environment and ranging from destination infrastructure (e.g. waste disposal, energy supply, traffic and parking), through spatial planning (e.g. polluting industry

regulation), to availability of tourism suprastructure suited to the interests of market segments (e.g. accommodation, F&B, entertainment, recreation).

Wine tourism – Wine consumption and connoisseurship have increasingly become an important part of a modern lifestyle. **Within the last 10-15 years wine tourism – visiting vineyards and tasting wines while travelling - has become an interesting and potentially lucrative product** being developed across the globe. Main motives for tourists to visit wineries include wine purchase, wine tasting, enjoying the vineyard with the rural landscape and learning about wine. **Product success factors:**

- Wineries conceptualised as attractions, having some unique features and/or a 'personality' concentrating on wine presentation and tasting. Wineries should make sure they are easy to find by posting road signs, there should be parking available, they should be logically arranged so that when guests arrive they proceed through the wine cellar to the wine tasting area and, finally, to a wine shop.
- Quality service in wineries which may implicate service training for winemakers.
- Wine roads linking several wineries as well as other complementary facilities (e.g. restaurants, accommodation, festival venues), creating synergy and increasing the attractiveness of a destination as a whole.
- 'Wine and food partnerships' are especially important and may include co-operation with local restaurants and/or local food producers (e.g. cheese, mushrooms, ham which complement wine). Local and/or well known chefs may be involved to reinforce the effect.
- 'Destination packaging' which includes visits to wineries, wine roads, other natural and cultural attractions, accommodation and F&B arrangements.

River cruising – Although a small segment of the total cruise industry, river cruises are gaining in popularity. Available research indicates rates of **around 200% year-to-year growth** within the last five year time span. A number of international companies operate cruises on the Danube, this being one of Europe's favourite river cruise destinations. **Product success factors:**

- Quality and category of cruise ships, especially in relation to the predominantly elderly clientele.
- Quality port facilities, especially in relation to ship safety and passenger control.
- Interesting on-land activities, including the offer of different one-day sightseeing possibilities. The possibility of combining land and cruising segments of a tour seems to be gaining in popularity as an attractive option

assuming the seamless transfer of passengers. The latter can include combining major cities with a river cruise (e.g. a several days stay in Budapest, followed by a Danube cruise) or combining of river cruising with recreational activities (e.g. cycling along the Drava, followed by a Danube cruise).

- Thematic river cruises dedicated to the exploration of a theme (e.g. music, history, wine, gastronomy, health) are also gaining in popularity.

Business tourism – Business tourism is a large segment of the travel industry, representing in 2009 approximately a 15% share of international trips. It encompasses meetings and conferences, exhibitions and trade fairs, incentive travel, team building events and individual business travel. **Business travel is a growing, lucrative segment. Product success factors:**

- Availability of quality conference and meeting venues.
- Availability of quality accommodation (charming and/or unique facilities can compensate for the lack of business hotels). Availability of business facilities within hotels (e.g. business centres with appropriate equipment) and availability of parking.
- Accessibility of business venues and accommodation facilities.
- Higher level of service (genuine hospitality and guest orientation can compensate high service standards).
- Availability of interesting attractions at the destination or in the vicinity and availability of visiting options designed for the business traveller (e.g. short guided tours, specially designed itineraries, options offered to accompanying family members).

3.3 Some elements of the marketing strategy and the strategy of sub-regions

3.3.1 Theoretical background

Tourism research has tended to concentrate not on tourism types but rather on tourist types and the various individual traits, characteristics, motivations, needs etc. of travellers. This makes it easier to understand tourists on the basis of the types of experiences they seek as individuals or groups.

The demand of water-related active and ecotourism is determined by two components:

- 1) motivation of the tourists – from the guests' side, and
- 2) natural resources and tourism supply – from the hosts' side.

Motivation or the drive to satisfy inner physiological and psychological needs has been fundamental to tourism researchers interested in the 'why' of tourist travel. From the other side, it is not enough to have the motivation, there has to be the place and the infrastructure to satisfy the needs.

3.3.2 Segmentation, targeting and positioning

The RTPP segmented the overall demand along **two dimensions**:

- family life-cycle, and
- tourism product (main activity, connected to lifestyle).

The family life cycle approach emphasises the interests and requirements stemming from being in an actual life stage. In the frame of the RTPP the following life stages have been applied:

- students,
- young individual travellers,
- full nesters (adults with children),
- empty nesters (adults without children),
- elderly travellers.

The second segmentation variable applied is **the consumed tourism product/lifestyle**. The RTPP emphasises that products in tourism are not mutually exclusive types but rather loosely defined bunches of service. They are internally heterogeneous, with a series of sub-segments or niches existing for shorter or longer periods as ever new trends and fashions emerge and disappear. Thus, the RTPP identified **a few 'main types'** with sub-groups:

- Recreation
 - o Holiday making ('rural recreation')
- Nature
 - o Ecotourists
 - o Hikers
- Sports and activities
 - o Cyclists
 - o Equestrians
 - o Water-based activities

- Hunters
- Culture
 - Cultural tourists
 - Wine and food lovers
- Health
 - Health treatment
 - Wellness
- Business
 - Incentive travel

Target groups may be defined on the basis of

- **Spending:** This is based on actual and potential tourism demand as expressed in segment-specific spending data. Overall tourist spending data of the country and of the programme area were deconstructed into segment-specific data and segments were ranked on the basis of their spending power. In frame of the RTPP, available estimates on tourist spending from the Hungarian Central Statistical Office were applied.
- **Endowments:** With this approach targeting is based on the actual and potential tourism supply. Attractions and services have to be linked to market segments and have to be ranked on the basis of fitting interest. This approach first requires the attractions and services of the programme area to be inventoried and qualitatively described.

As the outcome of the two-dimensional segmentation method, a space of 34 segments emerged (see the table in Annex 6). Most of the segments are existing and will be available in the future as well.

3.3.3 Competitor analysis of the Mura-Drava-Danube river area

In order to render the analysis more transparent, the RTPP takes into consideration only a limited number of riverside recreation destinations from across Europe. **Two circles of competitors have been defined.**

The destinations within the first circle are the most similar to the Mura-Drava-Danube river area in so far as they share similarities in natural heritage (all are rivers flow on large plains, are slower and have a great deal of marshlands), in cultural heritage (rich farmlands, rural communities) and in the tourism offer they already have or could potentially develop (biking, fishing, bird watching etc.). They are also relatively close geographically, and thus are the more accessible also for Hungarian and Croatian visitors.

Having different geographical characteristics (predominantly hilly landscapes) and being more distant from the main target markets, **the destinations of the second circle of competitors** can be considered as benchmarks rather than as direct rival areas.

Relative strengths and weaknesses

Area	Strengths	Weaknesses
<i>Drava (Hungary-Croatia)</i>	<ul style="list-style-type: none"> - Well preserved natural environment - Feeling of 'wilderness' in many sections - Relatively undisturbed rural life, surviving traditions 	<ul style="list-style-type: none"> - Relatively few cultural attractions - Tourism services underdeveloped in many areas - Many intersections with the national border
<i>Danube (Hungary-Slovakia)</i>	<ul style="list-style-type: none"> - Well-known brand name - Rich historical heritage - Some outstanding landscape values (Danube Bend) - Good access from main generating areas 	<ul style="list-style-type: none"> - High volumes of traffic - Rather polluted water - Many industrial zones - Unequal distribution of attractions - Gabčíkovo dam
<i>Tisza (Hungary)</i>	<ul style="list-style-type: none"> - Long, quiet watercourse with relatively low traffic - Good possibilities for water sports (especially canoeing) - Low population density, feeling of 'wilderness' - Lake Tisza, offering various forms of recreation and activity 	<ul style="list-style-type: none"> - Relatively low density of cultural attractions - Limited accommodation facilities outside the main cities and holiday centres - Only very few riverside roads – less attractive for bicycle tours - Relative monotony of landscape
<i>Pomurje (Slovenia)</i>	<ul style="list-style-type: none"> - Diverse tourism offer - Developed tourism sector across the entire area (accommodation, attractions, products, services, know-how) - Developed infrastructure - Good access to and within region 	<ul style="list-style-type: none"> - Relatively remote and less developed part of Slovenia
<i>Sava (Croatia)</i>	<ul style="list-style-type: none"> - Valuable natural resources, one of the largest European swamps in Lonjsko Polje - Unique bird breeding area (storks) - Level of preservation of natural and cultural resources 	<ul style="list-style-type: none"> - Limited promotional efforts - Seasonality of demand - Village modernisation in the broader surrounding area - Underdeveloped infrastructure in the broader surrounding area

Area	Strengths	Weaknesses
	<ul style="list-style-type: none"> - Visitor management services - Good access to location 	
<i>Gornje Podunavlje (Serbia)</i>	<ul style="list-style-type: none"> - Very valuable natural resources (marshes) - Part of the larger Danube marshlands area (Hungary-Croatia-Serbia) - Unique bird breeding area - Traditional lifestyle 	<ul style="list-style-type: none"> - Lack of tourism suprastructure (accommodation, attractions, products, services, know-how) - Very limited promotional efforts - Village beautification - Underdeveloped infrastructure in the broader surrounding area - Underdeveloped accessibility to the area
<i>Danube (Austria)</i>	<ul style="list-style-type: none"> - Well-known brand name - Well-marketed destination - Rich cultural heritage - High complexity of the offer - Excellent bike roads - Good access from main generating areas 	<ul style="list-style-type: none"> - High volumes of traffic - Overcrowding and elevated price level during high season
<i>Danube (Germany)</i>	<ul style="list-style-type: none"> - Well-known brand name - High density of attractions - High complexity of the offer - Excellent bike roads - Sophisticated services 	<ul style="list-style-type: none"> - High volumes of traffic - Relatively high price level
<i>Murtal (Austria)</i>	<ul style="list-style-type: none"> - Well-marketed destination - Developed tourism sector - Small-scale, familiar accommodations - Many recreation possibilities 	<ul style="list-style-type: none"> - Less suitable for water sports
<i>Elbe (Czech Republic)</i>	<ul style="list-style-type: none"> - Diverse tourism offer - Many attractive historical towns - Well-serviced bicycle tourism 	<ul style="list-style-type: none"> - River environment is strongly transformed - Less suitable for water sports
<i>Vlatva (Czech Republic)</i>	<ul style="list-style-type: none"> - Excellent possibilities for water sports (including sailing) and recreation - Many interesting heritage attractions in the river valley - Attractive natural environment in many sections 	<ul style="list-style-type: none"> - Less suitable for water sports outside the artificial lakes

The competitor river areas encompass very valuable resources, are attractive on a national and even international scale and offer the visitor a chance to engage in several types of outdoor activities. Especially worth emphasising are the Lonjsko Polje Nature Park on the Sava River, this being one of Europe's largest remaining swamp areas, as well as the thermal spas of Pomurje. Nevertheless, the Mura-Drava-Danube river area is judged similar to its competitors in relation to the natural and cultural resources. **The competitors' comparative advantage stems, however, from their better infrastructure and availability of human resources**, as well as a more established tourism orientation leading to a clearer and more positive image.

The competitive analysis demonstrates **a clear advantage for those areas where there is little other development** and this will pose a challenge for the direction and control of future developments. Wilderness and tradition emerge as two very strong sources of advantage. The disadvantages of overcrowding and overuse are equally strong indicators of a negative position.

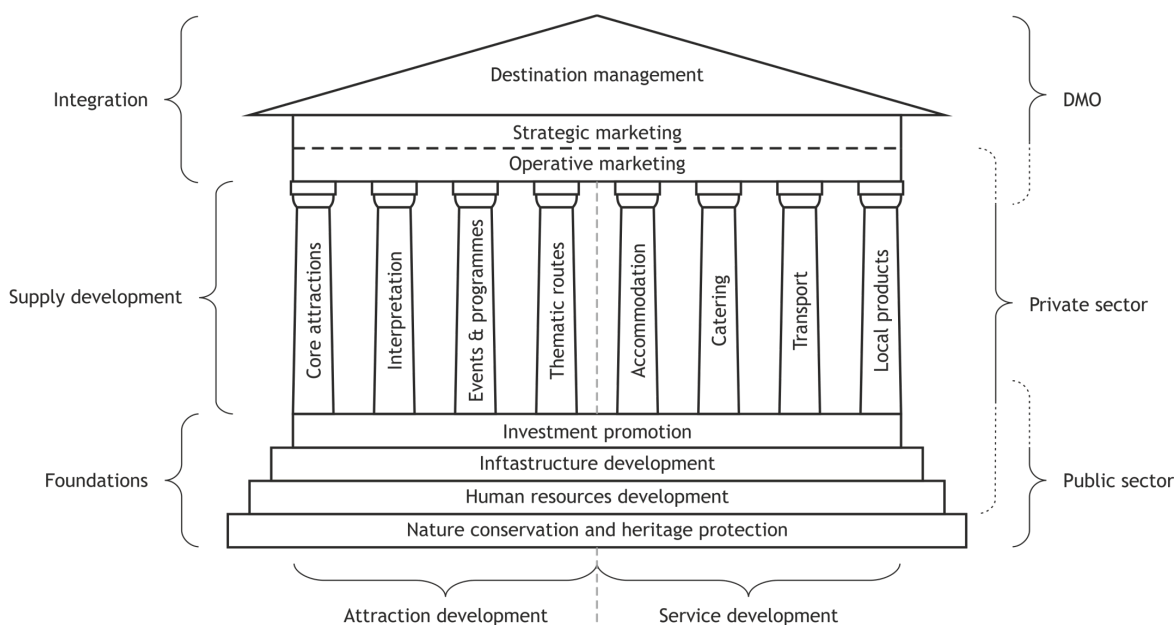
There is a tension in the analysis between these strengths and weaknesses as highlighted in the Tisza area where we see the positives of the long, quiet watercourse with relatively low traffic, good possibilities for water sports (especially canoeing), low population density and a feeling of 'wilderness' being balanced by the negatives of relatively low density of cultural attractions, limited accommodation facilities outside the main cities and holiday centres and only very few riverside roads making, the region less attractive for bicycle tours. This highlights the sensitivity in evaluation and the tensions that need to be positively managed in developing the competitiveness of the regions.

Some of the suprastructural weaknesses highlighted can be addressed more easily than others and therefore should not be weighted equally in the overall evaluation of the destination. For example, a lack of tourism services or tourism know-how can be addressed more readily than long-standing problems of pollution and industrial usage.

3.3.4 Objectives

The determinants of destination competitiveness can be grouped into two main categories: resource endowments and activities. Critical to the success of implementation, community and regional **tourism development must take place in a uniform framework**, taking internal and external connections into account. The regional tourism development strategy model (see figure below) considers elements defining tourism as well as the theoretical basics of destination management.

Conceptual framework of product development



This model suggests that in order to ensure appropriately efficient tourism development, certain areas that are more or less outside the realm of the strictly defined tourism sector must also be developed to a suitable level. **These 'foundations' are as follows:**

- **Nature conservation and heritage protection** – These activities have to be carried out predominantly by the public sector, regardless of the needs of the tourism industry.
- **Human resources development** – All levels of general education should include relevant subjects, plus education and training outside that general education framework should be organised.
- **Infrastructure development** – This should include good access to the given area and transport infrastructure should enable the selective exploration of the area with respect to environmental protection, distribution channels and communication networks.
- **Encouraging investment** – It is essential to encourage investment propensity by fiscal, financial and/or administrative measures.

The investments connected to these foundations of tourism development require predominantly public funds, national or European.

The development strategy's '**pillars**' are made up of supply development aimed at complex tourism product components which are the following:

- **Attraction development** – Improving the state of preservation, access and interpretation methods, as well as organising events and programmes that make the tourism offer unique and special. Interpretation is the best tool to influence visitor behaviour.
- **Service development** – It covers the quality- and the regionally adjusted, environment-friendly operation of basic tourism services (accommodation, hospitality etc.), as well as complementary services or services specifically based on local know-how (remedial and recreation services etc.).

Supply development largely depends on the initiatives of the private sector, possibly supported by public activities (especially concerning attraction development).

Destination marketing and management are 'at the top' in this structure of activities, functioning as **the integration of the results of various development activities** into a complex territorial tourism product. The objective is to market the tourism offer and the local economic offer in a uniform framework and as a single brand. **The integration of the tourism offer** should be in the hands of organisations representing special public-private partnerships, usually referred to as destination management organisations (DMO-s). The areas of responsibility are not exclusive, some overlapping of roles is evident.

The model described above considers both the comparative and competitive advantages. The development of resources (such as heritage protection, human resources development or creation of new attractions) helps **the exploitation of comparative advantages**, while the different activities connected to the same resources (e.g. interpretation, service improvements, marketing and management activities) **can give a boost to the utilisation of competitive advantages**.

3.3.5 The product strategies

For the evaluation of the attractions and of the already existing tourism infrastructure and suprastructure please refer to Chapter 3.1. **The following description of the development objectives is based on the structure of the product portfolio as seen in the tables of Annex 4.** Please note that four products are not mentioned in the present Chapter, having their own detailed product plans in Chapter 3.4.

A) Rural tourism

This can presently be considered a generally underdeveloped product with some occasional exceptions, mostly involving quality F&B services on family-owned farms. It also regarded as a tourism product with high development potential throughout Zone B of the programme area, in both countries. **Following priorities for the development of rural tourism in Zone B of the area can be set:**

- Regeneration, increasing attractiveness and sustainable development of village communities retaining destination authenticity and 'sense of place';
- Development of a 'tourism orientation' and of an understanding of visitor needs among local population and particularly potential tourism services providers;
- Development of tourism attractions and services creating an experiential value chain for visitors;
- Development of an attractive destination image;
- Increasing of visitor numbers and spending all year round.

Development needs
Nature conservation and heritage protection
Supporting spatial planning in rural areas; development of various models and incentive schemes encouraging rural 'beautification' projects and the preservation of local 'sense of place'.
Human resources development
Training programmes for farm owners increasing their entrepreneurial skills, their understanding of tourism and their tourism services skills; training programmes for potential destination management companies.
Infrastructure development
Development and/or upgrading of local waste disposal systems, water and electricity supply, local road networks.
Attraction development
<ul style="list-style-type: none"> - Generating village attractiveness while preserving 'sense of place'; increasing attractiveness of farms as tourism destinations. Attractiveness can be

Development needs

achieved through building styles (e.g. authentic, traditional, avant-garde), quality of F&B, level of guest 'involvement' in daily farm life (e.g. 'edutainment' activities for children, cooking courses etc.).

- Improving signage systems – all signage and spatial interpretation elements in the area should share a common visual identity. Care should be taken of signs being posted in an orderly and easily readable manner (e.g. 'totem poles' or other types of groupings at key orientation points). This 'in the field' interpretation system should be further supported by a set of regional and/or thematic tourism maps available on different media.
- Increasing the diversity, services and quality of thematic routes. Attractiveness of thematic routes needs to be enhanced with the offer of services beyond those linked to the route's theme and including resting and viewing points, tasting places, shops etc. It is important that such an organisational framework is set up which would assure the functioning of some services along the route at all times during normal commercial hours (an 'on call' system).

Services development

- Development of simple, comfortable accommodation in small hotels, B&B establishments or on farms. Implementation of 'green' architecture is a benefit. Upgrading of existing- and development of new F&B establishments offering an attractive mix of establishment and cuisine types, ranging from simple inns to fully catered restaurants. Emphasising traditional cuisine and regional wines; developing a restaurant rating system and/or a quality label.
- Increasing variety and availability of local products; emphasis on farm products, other sorts of F&B, utensils, handicrafts and souvenirs; certification of F&B items; provision of specialised shops with 'authentic' products.
- Improving public transportation; introduction of new transport options [P+R (park and ride) systems].
- Local products: As wide a variety as possible of local products and especially of local farm products needs to be made available to visitors. Distribution points should encompass farms and wineries themselves, local farmers' markets, specialty shops, but also restaurants, accommodation establishments, visitor centres and even museums. It is important that F&B items be certified while 'eco labelling' can provide added value to such products.

Rural tourism is a dominant product and image maker in the following sub-regions: Zalai dombvidék and Zselic-Szigetvár in Hungary and in Međimurska and Osječko-baranjska Counties in Croatia.

B) Fishing tourism

It is recognised as a type of tourism with high development potential in the whole Zone B of the programme area. **It can currently be described as a partially developed tourism product**, geared predominantly toward local domestic market, and with low income because actual tourists are mostly day excursionist. Good prospective is based on excellent natural resources presently almost unknown on the foreign market, the importance of which will grow in line with the higher protection level of the area. **Following priorities for the development of fishing tourism in Zone B of the programme area can be set:**

- Development of fishing tourism in line with sustainable development principles;
- Upgrading of facilities and services, including special events;
- Integration of fishing tourism with other elements of the regional tourism offer, creating an experiential value chain for visitors;
- Development of differentiating sub-regional positioning concepts and development of attractive destination image;
- Increasing of visitor numbers and spending all year round.

Development needs
Nature conservation and heritage protection
Sustainable spatial development; zoning for fishing areas; widening of existing protected areas and promotion of need for further protection of natural sites. The concept of clustering new developments either around existing or new destinations is advised.
Human resources development
Continuing education programmes aimed at training skilled, creative and guest-oriented professional staff. Particular attention is to be paid to training members of local fishing organisations interested in offering guide services to visitors.
Infrastructure development

Development needs
Ensuring environmentally sensitive waste disposal, energy, traffic and parking measures at destinations.
Attraction development
<ul style="list-style-type: none"> - Upgrading of existing and setting up of new fishing lodges integrated into the surrounding natural environment and reflecting authentic building styles, with traditional materials and interior design elements (e.g. using the local tradition of naive paintings like in Križnica). - Creation of paths and resting places for fishermen, integrated in the surrounding landscape. - Improving signage systems; posting interpretation boards with maps showing locations of fishing lodges and most attractive fishing areas. - Upgrading of existing contests in fishing and culinary festivities (e.g. the Fišijada) to attain national and even international relevance. These events should support the positioning concepts of the areas suitable for fishing tourism. - Increasing the diversity, services and quality of thematic routes along big rivers as main fishing locations.
Services development
<ul style="list-style-type: none"> - Upgrading and development of accommodation capacity in small hotels, B&B, on farms, in camps, at fishing lodges. Care must be taken to provide adequate space for the storage and cleaning of special fishing equipment. - Expanding and upgrading the variety and quality of F&B facilities and services offering local fish specialties; opening of fishing lodges to the public. - Improving public transportation; introduction of 'on demand' services available in areas close to big rivers (especially boats); introduction of new transport options (P+R systems). - Increasing the variety and availability of local products, including fish specialties, as well as fishing equipment items. Distribution points should encompass specialty fishing equipment shops at fishing destinations, other retail outlets in the area, farmers' markets. It is important that F&B items be produced by certified producers.

Fishing tourism is a dominant product and image maker in the Dunamente (Mohács) and Nagykanizsa-Zalakaros sub-regions in Hungary and in Virovitičko-podravka County in Croatia.

C) Hunting tourism

This strand of tourism is possible all over the Zone B of the programme area and large portions of the territory are covered with hunting grounds. Some of these have a very good reputation with hunters all over the world, especially around the Kopački rit area (Croatia), or in the Gemenc forest (Hungary), both famous for deer. The main problem is that most attractive areas for hunting in protected natural swampy areas are at the same time very attractive for bird watching, fishing and other types of nature-based tourism. Some hunting lodges and hunting grounds are very popular among hunters from abroad, like Tikveš in Kopački rit or Zelendvor near Varaždin.

The future hunting tourism initiatives should focus primarily on easement of the legal procedure, on product quality and on marketing. It is necessary to have in mind very specific characteristics of hunting tourists as a market segment, furthermore the importance of high quality and value-for-money as presently the most important elements to be improved in order not to lose this important market segment.

Following priorities for the development of hunting tourism in Zone B of the programme area can be set:

- Zoning of hunting grounds with a view of the need and potential for development of other nature-based tourism products;
- Upgrading of specialised facilities and services, including adjustments of current pricing and license issuing systems;
- Integration of hunting tourism with other elements of the regional tourism offer, creating an experiential value chain for visitors;
- Development of differentiated sub-regional positioning concepts and development of an attractive destination image;
- Increasing of visitor spending all year round.

Development needs

Nature conservation and heritage protection

Master planning of sustainable tourism development focused on the precise zoning of hunting areas; preservation of biodiversity and ecological balance.

Development needs
Human resources development
Training skilled, creative, guest-oriented hosts who can give professional information about the possibilities for hunting.
Infrastructure development
Equipment of existing hunting lodges in order to meet the needs of foreign tourists; creation of special shops and services for hunters.
Attraction development
<ul style="list-style-type: none"> - Maintaining adequate game counts within hunting grounds; upgrading of hunting lodges; help in the process of licensing for hunting; offering of traditional game specialties. - Improving signage systems; posting interpretation boards; maps showing the locations of hunting lodges and most attractive hunting areas. - Upgrading of traditional hunting celebrations (e.g. contests, cooking shows etc.); improvement of guest animation programmes with 'other than hunting' events (e.g. evening entertainment, gaming etc.).
Services development
<ul style="list-style-type: none"> - Upgrading and development of accommodation capacity specialised for hunters in existing hunting lodges and other accommodation capacities. Care must be taken to provide adequate space for the storage of special hunting equipment and of game caught by hunters. - Upgrading of existing- and development of new F&B establishments offering game specialties. Local hunting lodges (usually fully equipped for food preparation, but generally not open to public) should also be included in the offer. - Transport – improving 'on demand' services available in hunting areas; introduction of new transport options (P+R systems). - Increasing the variety and availability of local beverages, game foodstuffs, crafts and souvenirs connected to hunting. Distribution points should encompass special shops offering information and services for hunters, should be located near the most attractive hunting areas, restaurants, accommodation establishments, and there should be specialised shops as well with hunting equipment in the settlements of the destination area. It is important that F&B items be produced by certified producers.

Hunting tourism is a dominant product and image maker in the Zselic-Szigetvár sub-region in Hungary and in Varaždinska, Bjelovarsko-bilogorska, Virovitičko-podravska and Osječko-baranjska Counties in Croatia.

D) Ecotourism

This type of tourism could be offered throughout Zone B of the programme area – although it is currently underdeveloped. In Croatia, only some ‘embryo’ ecotourism destinations can be identified at Kopački rit- and Papuk Nature Parks. In Hungary, the presence of two national parks (Danube-Drava, Balaton Uplands) and some other important landscape protection areas (Zselic, Boronka) improve the area’s position, however, the development of ecotourism as an integrated product is still under its possibilities. **It is, at the same time, seen as a potentially very important niche product and image maker for the area’s nature-based tourism products.** Based on valuable natural resources and on substantial protected areas, the future potential of ecotourism will be strengthened also by the expected establishment of the Mura-Drava-Danube UNESCO World Biosphere Reserve.

Therefore it is necessary to set up development priorities as follows:

- Preservation and sustainable development of all natural landscapes and particularly of all protected natural areas;
- Development of facilities and services enabling the creation of a competitive ecotourism product;
- Integration of ecotourism with other elements of the regional tourism offer, creating an experiential value chain for visitors;
- Development of an attractive destination image;
- Increasing visitor numbers and spending all year round.

Development needs
Nature conservation and heritage protection
Sustainable spatial development; widening of the existing protected areas and promotion of the need for the further protection of natural sites.
Human resources development
Continuing education programmes aimed at training skilled, creative and guest-

Development needs
oriented professional staff at protected sites.
Infrastructure development
Creation of new educational paths and ecologically sound resting places; introduction of high 'eco' standards regarding waste disposal, energy supply, road traffic and parking. Destinations close to protected sites should abide by 'eco' standards (the closer the destination, the higher the standards).
Attraction development
<ul style="list-style-type: none"> - Development of environmentally sensitive facilities important for ecotourism, including paths, important landscape and bird watching viewing points, shelters for visitors; development of positioning and branding concepts of major protected areas aimed at increasing their recognisability. - Improving signage systems; posting interpretation boards; maps showing the wider protected areas and their main natural attractions and educational paths. - Development of events dedicated to certain type of plants, animals, biotopes (swamps, beech forests, steppes etc.). Special attention should be paid to programmes for school-age children. - Development of educational trails within protected areas and other interesting/significant locations. Trails should be equipped with interpretation boards, viewing and resting points, shelters, picnic points and, where appropriate, even with restaurants (also offering organic food made from local products) and specialised shops (also offering local ecological food as well as renting equipment).
Services development
<ul style="list-style-type: none"> - Development of special branded and labelled ecotourism accommodation capacities, including ecological camp sites and 'eco-lodges'. - Upgrading of existing- and development of new F&B establishments offering organic food, especially food made from local ecological farms. - Improving public transportation and 'on demand' services available; introduction of new transport options (P+R systems, electric cars, carriages, bicycle). - Increasing the variety and availability of local food from eco-farms to other food sorts, local handicrafts and souvenirs, all offered in specialised shops with organic types of food and similar products. It is important that F&B items be from certified producers, while 'eco labelling' can provide added value of

Development needs

such products to visitors.

Ecotourism is a dominant product and image maker in the Baranyai Drávamente and Somogyi Drávamente sub-regions in Hungary and in Virovitičko-podravska and Osječko-baranjska Counties in Croatia.

E) Bird- and animal watching

This strand of tourism means travel with the purpose of observing and/or studying birds in their natural habitats. **There are excellent bird watching possibilities in many locations of the programme area**, such as Kis-Balaton, the Boronka Landscape Protection Area or some territories along the River Drava and Danube in Hungary, furthermore Kopački rit Nature Park, Mura-Drava Regional Park and the Veliki Pažut reserve in Croatia. In these locations bird watching can be considered one of the primary attractions for the ecotourist. **Although currently underdeveloped, bird watching is perceived as a potentially important niche product throughout Zone B of the programme area.**

Considering these circumstances **the following development priorities for the creation of a recognisable bird watching product can be set:**

- Preservation and sustainable development of all natural landscapes and particularly of all protected natural areas;
- Development of facilities and services necessary for the creation of a competitive bird watching tourism product;
- Integration of bird watching with other elements of the regional tourism offer, creating an experiential value chain for visitors;
- Development of an attractive destination image;
- Increasing visitor numbers and spending all year round.

Development needs

Nature conservation and heritage protection

Sustainable spatial development, widening of the existing protected areas and promotion of the need for further protection of natural sites. Spatial planning should include zoning policies distinguishing between areas with different levels of

Development needs
protection, that is, different types of activities permitted in each zone.
Human resources development
Training skilled, creative, guest-oriented hosts who can give professional information about bird watching and who can offer various types of services to bird watchers.
Infrastructure development
Creation of new educational paths and ecologically sound resting places; introduction of high 'eco' standards regarding waste disposal, energy supply, road traffic and parking.
Attraction development
<ul style="list-style-type: none"> - Development of environmentally sensitive facilities important for bird watching activities, including paths, viewing points and shelters for visitors. - Development of positioning and branding concepts of the major areas suitable for bird watching. - Posting of signs pointing to bird watching sites. Also significant efforts are to be undertaken in posting interpretation boards with maps showing the most interesting areas for bird watching and the types of birds nesting in those areas. - Interpretation centres offering information, maps, rental of equipment (e.g. binoculars, boots) and educational activities, should also be located at major bird watching sites throughout the area. - Development of additional 'edutainment' type of events dedicated to bird watching and to the preservation of the natural environment. Special attention should be paid to programmes for school-age children. - Development of educational trails devoted to bird watching and other related themes within protected areas. Paths should be equipped with watchtowers, interpretation boards, resting points and shelters, picnic points etc.
Services development
<ul style="list-style-type: none"> - Development of special branded and labelled bird watching accommodation capacities, including camp sites. Local building styles and interior decoration reminiscent of an authentic atmosphere could be an asset. - Upgrading of existing- and development of new F&B establishments

Development needs

- preparing local food as well as local and regional wines.
- Further improvements need to be made in public transportation links, as well as in transportation services available on demand. Introduction of new transport options (P+R systems, electric cars, carriages, bicycle, special boats etc.).
- Increasing the variety and availability of local food, local handicrafts and souvenirs, plus special services for bird watchers. Distribution points should encompass specialty shops, farmers' markets, interpretation centres near bird watching sites, accommodations etc.

Bird/animal watching is a dominant product and image maker in the Baranyai Drávamente, the Dunamente (Mohács), the Nagykanizsa-Zalakaros and the Somogyi Drávamente sub-regions in Hungary and in Osječko-baranjska County in Croatia.

F) Culture tourism

This encompasses trips motivated wholly or in part by visitor interests in the historical, artistic, heritage- and lifestyle attractions of a destination. Cultural attractions either as central parts or environmental factors are visible in numerous tourism products. **Cultural attractions primarily provide tourists with intellectual experience even though these show a great deal of difference as far as the content is concerned.** The notion of 'intellectual experience' is not restricted to the consumption of intellectual creations (such as masterpieces of art) – learning about everyday life and the 'consumption' of mass culture also belong to this category.

Cultural tourism can be developed either as an individual product or as an augmentation in the programme area. The development of themed routes for example or the enhancing of the experience offer of some key attractions would count as individual product development. As an augmentation, cultural tourism attractions could enhance the attracting power of the regional product. This role is of great significance in the case of cycling tourism, health and wellness and wine tourism where these can form integral elements of image formation and content definition.

The current state of development of culture tourism varies across Zone B sub-regions. Some culture tourism sub-products are seen as more developed than others. Nevertheless, **further potential for development is perceived across Zone B and following development priorities can be set:**

- Increasing attractiveness of towns and major free-standing cultural landmarks through renovation, reconstruction and regeneration efforts retaining the destination's 'sense of place';
- Development of a 'tourism orientation' and an understanding of visitor needs among local population and particularly potential tourism services providers;
- Development of tourism attractions and services creating an experiential value chain for visitors;
- Raising awareness of existing cultural attractions, strengthening their role in the image formation of the region;
- Improving the experience of cultural tourism consumption and fostering adjustment of the offer to the requirements of different traveller segments;
- Development into attractions of the cultural values (resources) currently not being part of the offer or playing only a marginal role in it;
- Exploiting the potential of cultural values in identity building, rendering the content of the relationship of visitors and local communities more rich;
- Increasing the value of other tourism products offered by the area.

Development needs
Nature conservation and heritage protection
Support to spatial planning of urban areas; development of various models and incentive schemes encouraging urban 'beautification' projects; revitalisation of historic town centres and preservation of local 'sense of place'.
Human resources development
<ul style="list-style-type: none"> - Developing and conducting a series of educational programmes for awareness raising, aimed at local population; specialised training for tour guides; foreign language training for workers in the hospitality industry. - Training programmes for F&B establishment owners aimed at innovation and at the raising their offer's quality as well as that of their skills in guest relations. - System of informative awareness-raising workshops for local stakeholders (e.g. museum staff, religious sites, shopkeepers etc.) on topics such as the relevance of tourism for the community, the needs and expectations of modern visitors, 'to do' items in servicing guests.
Infrastructure development

Development needs
<ul style="list-style-type: none"> - Development and/or upgrading of local waste disposal systems, water and electricity supply, local road networks and telecommunications. - Establishing free Wi-Fi hotspots to facilitate downloading of tourist information to notebooks and mobile devices. - Setting up complex 'meeting points' where visitors can get an overview of the entire offer. - Creating a system of signposts for thematic routes based on motives visually expressing the coherence of experience.
Attraction development
<ul style="list-style-type: none"> - Development of positioning and branding concepts of several key urban destinations in different parts of the programme area which are to become regional image makers. - Development of new 'man-made' attractions, namely theme parks and/or entertainment centres in towns or their immediate vicinity as 'magnets' for pulling visitors to the area. - Modernisation of museum collections and exhibitions, creating fun, interactive, edutainment experiences. Adapting visiting hours of museums to visitor needs. - Development of a spatial interpretation system which includes not only the major cultural sites and attractions and the facilities of historical and cultural significance: the system should further be supported by a set of regional thematic maps available on different media. - Development of 'information points' in towns and attached to out-of-town cultural sites, ranging from central visitor centres over information booths at transportation hubs to touch-screen info-points. - Quality improvement of selected existing events and festivals. These improvements are to particularly focus on the professional management of events. - Further development of new thematic routes based on and presenting themes such as industrial heritage, the Ottoman Empire, the 'Iron curtain' etc. The attractiveness of the thematic routes needs to be enhanced with the offer of services beyond those linked to the route's theme and including resting points with attractive views, restaurants etc.
Services development
<ul style="list-style-type: none"> - Further diversifying and improving the quality of available accommodation.

Development needs

Development of small hotels, B&B establishments and hostels as well.

- Upgrading of existing- and development of innovative new F&B establishments offering an attractive mix of establishment and cuisine types, ranging from simple inns to fully catered restaurants.
- Introduction of a restaurant rating system (e.g. categories, 'stars') or instituting a regional quality label.
- Increasing the availability of quality coaches or other transportation vehicles for guided excursions. Providing guarded and affordable longer term parking in towns.
- Increasing the variety availability and distribution of local products; certification of F&B items; provision of specialised shops with 'authentic' products.

Cultural tourism is a dominant product and image maker in the Pécs-Mecsek, Siklós-Villány and Zselic-Szigetvár sub-regions in Hungary and in Varaždinska, Osječko-baranjska and Vukovarsko-srijemska Counties in Croatia.

G) Health and wellness tourism

It encompasses travel motivated by maintaining and improving one's physical and mental health, **ranging from travel for the purposes of a medical intervention at a medical clinic to fitness and beauty treatments at a wellness centre.**

Developments realised **in Hungary** during the last decade targeted the needs of the basic consumer groups such as health or wellness tourists. In the future, product development will have to be based on a more sophisticated market segmentation that considers niche markets (e.g. overweight children or men's beauty).

In Croatia, although the health and wellness tourism product is for the most part currently underdeveloped, it is considered to be a product with high development potential. This potential stems from existing travel market trends showing a pronounced interest in health and wellness products and it is also based on high quality natural resources, especially in abundant, partially still untapped, thermal wells. Future growth of a competitive health and wellness tourism product presupposes the development of diverse, profiled, quality facilities and services targeting a variety of market segments, it supports integration with other complementary tourism products in the area resulting in memorable travel experiences for guests, it makes necessary the significant upgrading ('beautification')

of built environment and it needs clever, image-creating product- and regional promotion. Existing thermal spas, advancing their own product diversification and expansion, can be expected to lead overall product development.

Following priorities for the development of health and wellness tourism in Zone B of the programme area can be set:

- Creation of environmentally sensitive and 'healthy' destinations;
- Diversification of the health and wellness product in line with market trends;
- Clustering of experiences in order to enhance the overall experience and satisfaction of the consumer;
- Development of a sub-regional thematisation and specialisation of the health and wellness product in order to decrease competition among neighbouring regions;
- Development of differentiating sub-regional and/or spa/wellness centre competitive positioning concepts;
- Linking of indoor and outdoor experiences in order to offer a more complex product;
- Integration of the health and wellness product with other elements of the regional tourism offer, creating an experiential value chain;
- Increasing occupancy rates all year round.

Development needs
Nature conservation and heritage protection
Master planning of wellness and spa development with particular emphasis on sustainable use of space and natural resources. The concept of clustering new developments either around existing or new centres is advised.
Human resources development
Continuing education programmes aimed at training skilled, creative and guest-oriented professional staff. Particular attention is to be paid to education in the field of nutrition.
Infrastructure development
<ul style="list-style-type: none"> - Enacting environmentally sensitive waste disposal, energy, traffic and parking measures in destinations. - (Thematic) routes linking wellness spas to the countryside which allow

Development needs
<p>visitors to enjoy a range of outdoor activities. For the diversity-oriented wellness customers outdoor activities create the opportunity to diversify their experience. Health visitors on the contrary who take part in a cure, a more holistic approach to health including meditation, nutrition and physical activities, may be attractive.</p>
Investment promotion
<p>Preparation of 'investment project presentation kits' outlining investment possibilities and aimed at attracting potential investors.</p>
Attraction development
<ul style="list-style-type: none"> - Spas should be developed and re-developed in a way to represent their orientation (e.g. clear focus on a limited number of target groups such as families, seniors, sportsmen etc.). Physical development (building and renovating) should clearly represent target group selection (e.g. with secluded areas for adults). - Interpretation – The current spa offer concentrates on physical amenities. In the future, lifestyle coaching targeting both the actual use of spa facilities and the sustenance of the health- and wellness experience becomes more important. Topics might offer weight loss, healthy eating (including diets), physical exercises and stress management suggesting harmony with nature, the society and the self. - Local (sub-regional) programmes outside the spa should be thematically linked to the health or wellness experience (e.g. healthy cooking).
Services development
<ul style="list-style-type: none"> - Upgrading of existing- and development of new accommodation capacities within the health and wellness centres, particularly in hotels. Adherence to higher quality standards and to special standards for health and wellness accommodation should be assured. - Rural accommodation units could concentrate on developing health and/or wellness amenities and services (e.g. infra-sauna or salt room). These should be centred around the main topic of the nearby spa. - Several rural accommodation units could offer specially targeted health plans (e.g. fast, diet, physical training). These would both enhance occupancy rates and could contribute to the overall experience and satisfaction of visitors. - The development of restaurants and confectionary menus offering local specialities (optionally based on local organic agricultural products),

Development needs

especially within spas.

- Crucial to targeting groups with special needs is the availability of dietary menus (vegetarian, diabetic, gluten free, low cholesterol etc.).
- Improving public transportation and 'on demand' services available to spa/wellness centres.

Health and wellness tourism is a dominant product and image maker in the Belső-Somogy, Nagykanizsa-Zalakaros and Siklós-Villány sub-regions in Hungary and in Međimurska, Varaždinska, Bjelovarsko-bilogorska and Osječko-baranjska Counties in Croatia.

H) Wine tourism

This may be an important component of rural tourism, if well developed. Currently the state of wine tourism in the programme area is diverse. **In Hungary**, the Siklós-Villány sub-region is one of the most advanced territories both in rural tourism and in wine tourism as one of the flagship products of this area. **In Croatia**, winegrowing is prevalent throughout the programme area with all of the most prominent wine-growing regions being located within Zone B. **It can currently be described as a partially developed tourism product**, geared predominantly toward organised group visitors, but with major improvements taking place in relation to wine road development and the equipping of individual wine cellars.

Wine tourism development in Zone B of the programme area needs to focus primarily on enhancing all aspects of product quality. The following development priorities can be set:

- Preservation of natural landscape characteristics and of the overall local 'sense of place';
- Development of distinguishing competitive positioning concepts of wine-growing regions and development of an attractive destination image;
- Creation of a coherent experience of wine making and wine consumption on the sub-regional level (where it is possible and necessary);
- Development of services beyond wine tasting next to the cellars in order to provide a coherent experience of wine and the countryside and to increase spending;
- Integration of the product with sub-regional agricultural and handicraft activities to increase the multiplier effect of wine tourism;

- Integration of wine tourism with outdoor activities, wellness and culture to provide an image of prestige and pampering.

Development needs
Nature conservation and heritage protection
Guiding and incentivising public and private stakeholders in the upgrading (beautification) of built environment, in respecting traditional building styles, village and vineyard layouts and in the overall preserving of the local 'sense of place'.
Human resources development
Training programmes for winery owners/managers and staff aimed at increasing the quality of their tourism offer and their skills in guest relations. Such programmes need to deal with expected quality standards of facilities, instructions on offering wine tasting (sommelier) and food services, instructions on guiding, guest entertainment or animation, as well as foreign language training.
Infrastructure development
Environmentally sensitive wine road construction, development of the destination infrastructure which is compatible with, and supportive of, a preserved environment, including waste disposal, energy supply, road traffic and parking.
Attraction development
<ul style="list-style-type: none"> - Development of positioning and branding concepts of the major wine-growing regions aimed at increasing their recognisability and attractiveness. - Creating other wine-related attractions such as wine museums, regional wine tasting centres and, even, wine schools. - Interpretation – Wineries should develop premises enabling the visitors to learn and develop. Art shops for drawing and painting courses and kitchens hosting cooking courses are two examples of this development. - With the more diverse clientele, multi-language interpretation material and guiding/tasting capacity will be more and more important. - Posting of interpretation boards with explanations of significant local characteristics and sights, as well as the construction, equipping and operating of regional visitor centres at the 'entrance' to major wine growing areas. - Development of a variety of new creative events in the vineyards, linking wine with art and culture, offering classical and jazz music, art exhibitions and

Development needs
<p>performances. These events should support the positioning concepts of the wine-growing regions.</p> <ul style="list-style-type: none"> - The attractiveness of wine roads needs to be further improved by increasing the diversity of services available on the wine road which could include viewing points, restaurants, shops etc.
Services development
<ul style="list-style-type: none"> - Developing 'overnight-in-the-vineyard' type accommodation. Provision of authentic ambiance and implementation of 'green' architecture may be an asset. - Upgrading and expanding the variety and quality of F&B facilities and services; developing 'wine and food partnerships' in order to include local ingredients and specialities into the menus offered. In the medium term these specialities should also be available as independent products for tourists to buy. - Improving public transportation and 'on demand' services available to wine growing regions; preparing for guests who arrive on bike, on horseback and/or by means of walking. - High quality, branded local food products (e.g. dairy and meat products, mushrooms etc. which complement wine) should be developed and promoted to visitors. If these products are also available to buy and/or have delivered from an on-line shop together with wines, the lifestyle experience may be available throughout the year, sustaining commitment to the wine region. - Developing a product line of decorative products themed grape-and-wine. Important to find the balance between contemporary style and local motifs that will not become cheap kitsch. - Developing a product line of health and beauty products based on local grape and wine.

Wine tourism is a dominant product and image maker in the Siklós-Villány sub-region in Hungary and in Međimurska, Požeško-slavonska, Osječko-baranjska and Vukovarsko-srijemska Counties in Croatia.

I) River cruise

This is an upmarket tourism product that links independent destinations along a major waterway. There are currently two docking ports within the programme area located in the towns of Vukovar and Ilok (Vukovarsko-srijemska County). In Hungary, the port of Mohács (Baranya County) can serve as the 'entrance' of the area for cruise tourists arriving on Danube. Additionally, the Drava river also offers sailing possibilities, although these are currently very limited, principally due to long shallow stretches and lack of any significant infrastructure outside Osijek (Osječko-baranjska County).

Although river cruising represents a niche tourism product in Zone B of the programme area **it has, nevertheless, high development potential for certain micro-regions mainly along the Danube and to a lesser extent along the Drava rivers.** The following development priorities can be set:

- Preservation of river waterways and surrounding natural landscapes;
- Development of environmentally sensitive passenger port- and river marina facilities;
- Integration of the river cruising tourism product with other elements of the regional tourism offer, creating an experiential value chain for visitors;
- Development of an attractive destination image adding to the overall experience of the 'great' European rivers;
- Increasing number of dockings and increasing visitor spending on land.

Development needs
Nature conservation and heritage protection
Inclusion of river passenger ports and marinas in spatial plans, optimising their capacity with environmentally sensitive use of the Danube- and particularly the Drava waterway.
Human resources development
Training of skilled, guest-oriented tour guides for conducting land excursions.
Infrastructure development
<ul style="list-style-type: none"> - Upgrading and construction of new port / marina / ferry landing facilities on the Danube. In addition to docking infrastructure, these facilities should

Development needs
<p>include visitor services such as F&B, information centre and gift shop (all of which could also function within a visitor centre).</p> <ul style="list-style-type: none"> - Construction of smaller river marinas along the Danube and the Drava in accordance with demand forecasts, carrying capacity and feasibility calculations. Marinas should be equipped with berths, boat repair facility, fuelling facility and minimal guest services including F&B, information and gift shop. - Preservation and upgrading of traditional wooden ferry or barge landings on the Mura.
Investment promotion
<p>Preparation of 'investment project presentation kits' outlining investment possibilities, particularly in cruiser docking and marina infrastructure.</p>
Attraction development
<ul style="list-style-type: none"> - The main challenge is the interpretation of the sites and attractions visited. Two of the suggested packages, Pécs and thematic cruises require both professional guiding and sophisticated printed and online background information on the programme locations visited. - As these land excursions are limited to four to six hours, few additional programmes may be attractive such as folk programmes (e.g. Siklós or Villány), classical concerts (e.g. in Pécs or Siklós) or the busó heritage in Mohács.
Services development
<ul style="list-style-type: none"> - Availability of attractive F&B facilities, especially with regional dishes and wines and with an authentic atmosphere. Offering haute cuisine and/or special folk cuisine meeting special dietary requirements. - Convenient and fast transfer to programme locations requires the use of modern coaches and excellent operation. - Given the successive short visits to a number of destinations over a period of 9 to 15 days, cruise passengers are interested in buying high-quality authentic (e.g. handmade) local products (beverages, foodstuff, crafts and souvenirs).

River cruising is a dominant product and image maker in the Dunamente (Mohács) sub-region in Hungary and in Vukovarsko-srijemska County in Croatia.

J) Business tourism

This type of tourism encompasses a number of sub-products such as meetings and conferences, exhibitions and trade fairs, incentive travel, team building events and individual business travel. **Business travel is a growing, lucrative segment. In Croatia, in terms of Zone B of the programme area, business tourism is considered to be partially developed** and is currently limited mostly to business meetings linked with the operations of local industries and is mostly conducted in county seats or larger towns such as Čakovec, Varaždin, Koprivnica, Bjelovar, Virovitica, Osijek and Vinkovci. Other types of MICE products are negligible and limited to the domestic travel market. **In the Hungarian part of the area, Pécs is predominantly attractive**, considering that individual business travel, trade fairs and shows are based on local business activity. Nagykanizsa is also an important location as a regional business centre.

The potential for growth, which needs to be supported by adequate facilities and services, is especially seen in expanding the offer towards a variety of conference- and exhibition products (e.g. seminars, workshops, smaller congresses, team-building programmes, smaller fairs) and towards new destinations, particularly in locations within or near high-quality, protected natural environment sights.

Further development of business tourism is considered a viable opportunity throughout Zone B of the programme area. **The following development priorities can be set:**

- Diversification of business tourism to include a broader array of MICE products offered in diverse locations ('beyond individual business travel, beyond town centres');
- Increasing the availability of quality MICE venues and services;
- Integration of other elements of the regional tourism offer with business tourism, creating an experiential value chain for guests;
- Ensuring that auxiliary services are available either on-the-spot or regionally;
- Development of an attractive destination image;
- Increasing accommodation occupancy and visitor spending all year round.

Development needs
Nature conservation and heritage protection
Detailed spatial plans delineating the scope and character of built facilities within or in the vicinity of quality protected natural areas.
Human resources development
Continuing education of hotel- and other business venues staff aimed at training skilled, creative and guest-oriented professional staff specialised in meeting the needs of business visitors (e.g. technical support, F&B, information services etc.).
Infrastructure development
Infrastructure development described in the context of the other tourism products will also serve this segment.
Attraction development
<ul style="list-style-type: none"> - Increasing availability of diverse equipped venues, including multifunctional spaces. It must be kept in mind that most conference and meeting events are on a local/regional scale not likely to exceed 250-300 participants, with most numbering up to 100-150 participants, making this product realistic in a range of venues. - Organisation of a variety of excursions, guest animation and entertainment programmes to be offered as part of MICE programmes. These are to be conducted by licensed destination management companies.
Services development
<ul style="list-style-type: none"> - Upgrading and/or development of higher quality and/or 'unique' accommodation facilities; availability of business facilities within rural accommodation and hotels. Adherence to 'green' architecture may be an asset. - Providing coffee breaks and event catering (such as receptions) not only in their own premises but also at unusual locations (open-air or within other attractions). - Transfers to and from regional airports. - Transfers to programme venues as part of a complex service. - Programme (event) management integrated with accommodation provision

Development needs

in order to increase the value added.

- Increasing the availability of a wide variety of local products and souvenirs, ranging from regional wines and spirits, guidebooks and publications to foodstuff and an array of locally produced handicrafts.

Business tourism is a dominant product and image maker in the Nagykanizsa-Zalakaros and Pécs-Mecsek sub-regions in Hungary and in Varaždinska and Osječko-baranjska Counties in Croatia.

3.4 Specific product plans

3.4.1 Plan for bicycle networks of the region

Current product characteristics

The existing network of cyclotourism and mountain bicycling routes and paths is a market-ready tourism product, offering a broad range of choices capable of meeting diverse visitor demands. **The network includes international cyclotourism corridors** (EV 6 Danube Route, EV 13 Drava Route, Mura-Drava Route, Pannonian Peace Trail, Three Rivers Route, section of the future Balaton-Adriatic Route) as well as county routes and local paths (around 30 routes), spanning in total approximately 2.000 km. **Shorter, 'capillary' routes need further development.** The established cyclotourism routes of the Croatian part of the programme area have been almost completely sign posted. On Hungarian territory, signposting is not complete on many national and international routes.

There is a virtually complete absence of visitor and/or information centres along the cycling routes and paths in Croatia. In Hungary, there are 11 Tourinform Offices in Zone B, and the educational and visitor centres of the Danube-Drava National Park offer further possibilities of interpretation. Other spatial interpretation elements, namely interpretation boards indicating points of interest along the routes, are few and far between. Cyclotourism maps and guides are available in printed format and in electronic version as well.

Specially adapted 'bike & bed' accommodation is still lacking throughout the area. Generally, there are no F&B services especially adapted for cyclotourists. Several local DMO-s as well as foreign specialised agencies offer cyclotourism packages

including local guides, luggage transfers and vehicle safety escort. Most tours are currently focused on the Danube route and the Danube region in general. Agencies also rent equipment.

Practically all the sub-regions of Zone B are attractive, most of them even highly attractive, cyclotourism and bicycling destinations where the product's core offer, namely the extensive route and path network, has to a large extent already been created. Although there are further opportunities for the network's enlargement, especially in the linking of major routes with local ones, **it is the accompanying services** offered to cyclotourists and bicyclers (i.e. information, accommodation, merchandise etc.) **as well as destination promotion which now need to become the focus of attention.**

Priorities

In this sense, following development priorities of cyclotourism and bicycling in Zone B of the programme area can be set:

- Development of cyclotourism and bicycling in line with sustainability principles. Routes and paths should be planned in as unobtrusive a manner as possible, built facilities should be constructed in accordance with 'green architecture', guest services should be 'eco friendly';
- Upgrading of facilities and (basic and complementary) services, creating an experiential value chain for visitors;
- Upgrading of human resource capacities. Organising of training programmes for diverse groups of service providers and conducting of awareness-raising programmes are key steps in developing the knowledge and capabilities of stakeholders;
- Development of attractive cyclotourism and bicycling destination images. The overall image of Zone B as an active and authentic destination should be supplemented by that of an attractive and quality cyclotourism and bicycling destination;
- Product and sales capacity improvements are to generate increases in visitor spending.

Development needs
Nature conservation and heritage protection
<ul style="list-style-type: none"> - Master planning of further cyclotourism and bicycling routes and paths. This type of planning is to be carried out within the scope of regular spatial

Development needs
<p>planning activities in the area's counties.</p> <ul style="list-style-type: none"> - Production of guidelines for environmentally sensitive building of cyclotourism and bicycling facilities and infrastructure (e.g. routes, paths, shelters, resting points, viewing points, accommodation, F&B establishments etc.).
Human resources development
<ul style="list-style-type: none"> - Training programmes in guest relations for service providers to cyclotourists and bicyclers (e.g. visitor centres, accommodation, catering, retail owners/managers and staff). Programmes should focus on host-guest relations and on provision of services. Programmes should showcase relevant case studies. - Brief training for guides accompanying and leading cyclotourism trips. - Awareness-raising programmes for local stakeholders (local governments, tourism investors and local inhabitants).
Attraction development
<ul style="list-style-type: none"> - Further development of the cyclotourism and bicycling network of routes and paths. These could be additional main or 'backbone' routes and, particularly, networks of 'capillary' routes and paths between the main ones, intertwined through the area. Such 'capillary' routes and paths would make it possible for visitors to spend more time exploring a destination in greater detail. - Further upgrading of visitor facilities along routes and paths – this could include the development of resting points, viewing points and picnic areas. Careful consideration must be given to the extent of construction, the choice of materials, the clean-up service etc. - Further upgrading of accessibility for bicycles at important sights and attractions. In addition to providing adequate and safe parking for bicycles, the safe storage of small luggage items is important. - Development of themed 'capillary' cyclotourism routes and paths. It is the shorter, 'capillary' routes which are especially suitable for creating themed routes and paths, being easier to organise, but also offering a more 'concentrated' and thus a more meaningful experience for the visitors. - Development of educational cyclotourism routes and paths, these explore a certain theme with emphasis being placed on opportunities for learning about it. The opportunities for visitor participation in some theme-related activity along the route (e.g. apple picking) could increase visitor satisfaction

Development needs

and route attractiveness.

- As part of interpretation, sign posting of 'capillary' cyclotourism routes and paths and posting of direction signs and of 'brown signs' along cyclotourism routes is also increasing satisfaction levels and perceived product quality.
- Posting of interpretation boards which offer basic information about a certain location, sight or, in this case, route or path, conveying its significance. Interpretation boards of varying sizes and information content (e.g. maps, photographs, illustration, text), could be placed alongside or within certain attractions, as well as along routes and paths.
- Development of maps and guides of cyclotourism routes and paths. Along with a graphic representation of the routes/paths, information on difficulty level, duration, resting points, accommodation and F&B points, services available for bicycles at stopping points, as well as information on other key features and attractions along the route/path should be included. It is strongly recommended to introduce maps for GPS-devices with route planning capabilities and some specific applications for smart phones that can encompass the functions of a guidebook, a map with route planner and a reference book (e.g. with description and photos of protected species). Such electronic material should be made freely available on the destination's tourism website.

Services development

- Developing networks of 'bike & bed' accommodation, adhering to some joint standards, for example: providing lodging for a single night, safe and free storage space for bicycles, facility for washing/drying clothes and equipment, facility for washing bicycles and performing small repairs, provision of extra F&B portions, information on public transportation schedules and on the availability of repair shops.
- Further development of the F&B offer should include the upgrading of existing and the opening of new facilities, thus offering an attractive mix of establishment and cuisine types, ranging from simple country inns to fully catered restaurants. The accent should be on traditional and authentic cooking using local produce. Care should be taken in providing some cyclotourism and bicycling specific services such as, for example, the provision of adequate and safe parking for bicycles and 'food to go' options.
- Improving public transportation services – (1) improving connections from main railway/bus stations and airports to route/path starting/ending points; (2) providing train wagons and buses with special compartments for the safe transfer of bicycles; (3) synchronising bus and rail schedules in case of

Development needs

- connecting trips; (4) offering bicyclers and cyclotourists joint train and bus tickets and/or multi-day tickets.
- Provision of organised car parking at route starting points, at several points along the route and near public transportation hubs (e.g. train, bus stations), with transfer services to routes or in conjunction with accommodation facilities.
- Organisation of transfers of luggage and equipment between stopover destinations on a route, as well as visitor transfers from and to public transportation hubs or car parks.
- Increasing variety, availability and distribution of local products. Development efforts should be directed toward creating more accessible distribution points for such sought-after local products. These could encompass specialty shops, souvenir shops, but also local farmers' markets, farms and wineries, accommodation, F&B establishments, visitor centres and museums. Producers should take into account the need for special, 'traveller friendly' packaging.
- Specialised bicycle shops in the vicinity of the routes (at least in major towns), offering spare bicycle parts and other travel equipment, should be available.

Promotion and sales

- Incentivising existing and/or new DMO-s in offering cyclotourism and bicycling products. Incentives for DMO-s could entail assistance in putting together travel packages and/or itineraries, establishing contacts with various services providers, reduced-rate or free for the participation in specialised training programmes etc.
- Joint promotional activities – Cyclotourism and bicycling opportunities should be jointly promoted featuring Zone B of the area as a single destination. Joint promotional activities should include: (1) various PR activities, including study tours for travel organisers and travel writers, presentations at relevant fairs and exhibitions; (2) publication of various printed materials, including a cyclotourism and bicycling image-information guide of the area with maps; (3) a website devoted to bicycling and cyclotourism opportunities, also featuring other complementary products; (4) limited advertisements in specialised publications or in catalogues of specialised travel intermediaries.
- A more active and effective promotion of existing bicycling and cyclotourism events, as well as creation of new ones could be an effective way to publicise both this tourism product and Zone B as a bicycling and cyclotourism destination.

Although bicycling and particularly cyclotourism is one of those tourism products with development potential throughout Zone B of the programme area, **the product leaders and principal image makers are expected to be concentrated in the 'river sub-regions' along the Mura, Drava and Danube.** It is thus Međimurska, Varaždinska, Koprivničko-križevačka, Virovitičko-podravska and Osječko-baranjska Counties which represent the product's core offer in Croatia, whereas the target sub-regions on the Hungarian side are Baranyai Drávamente, Dunamente (Mohács), Muramente, Siklós-Villány, Somogyi Drávamente, and Zalai dombvidék.

3.4.2 Plan for water-related types of tourism of the region

Current product characteristics

Water-based tourism involves all activities connected to water. **The market can be segmented according to the level of skill and physical exertion.**

- **Sport and adventure:** here the substantial motivation is to reach a high performance; choices can range from easy to extreme, from low- to high impact, from individual- to team pursuits, from casual- to committed participation, from modest- to sophisticated equipment usage, and from relatively inexpensive to expensive setup and participation cost (e.g. fishing, rafting, kayak-tours).
- **Leisure:** water is used here as an 'element of experiences' (e.g. theme parks, aqua parks, kayak-tours).
- **Recreation:** here water has a healing, soothing role, it can be described as an 'elixir for the everyday problems' (e.g. visiting of spas, bathing, boating, walking along the coast/riverbank).

Principal locations relevant for the development of water based tourism in Croatia are located on the river banks of Mura, Drava and Danube (i.e. mainly in Zone A of the programme area). Large artificial lakes, namely Dubravsko, Varaždinsko and Ormoško, as well as a number of smaller lakes such as Matičnja near Varaždin ('Aquacity'), Šoderica near Koprivnica and Čingi Lingi lake near Đurđevac also lie in close proximity to the Drava. Other important locations suitable for water sports located somewhat further away from the rivers, but still within Zone B of the programme area, are mainly small lakes, the most important are near Orahovica, Našice, Đakovo, Darda, Vinkovci and Županja. As locations suitable for water-based tourism several spas in the area have to be considered, namely Sveti Martin, Varaždinske Toplice, Daruvar, Velika and Bizovac, even though they offer only bathing.

In Hungary the Danube, the Drava and the Mura are usable for development of water-based tourism in the area – rafting and kayaking-canoeing are possible on these rivers. There are approximately 125 lakes in Zone A of the programme area on the Hungarian side which are suitable for water-based tourism, most of them are fishing lakes. The most famous lakes for fishing are: Gyékényes (app. 300 ha), Deseda (app. 218 ha), Lake Pötréte (app. 150 ha), Lake Merenye (app. 120 ha) and Lake Zalaszentmihály (app. 107 ha). The most important kayaking or canoeing societies are based near Nagykanizsa and Lake Deseda.

There are approximately 21 spas or thermal baths in Zone A (9 in Zala, 7 in Somogy and 5 in Baranya County). There are a lot of wellness spas on this side of the area, the most famous are Zalakaros, Zalaszentgrót, Kehidakustány and Gelse. The medicinal element determines the profile of some spas, like in case of Hévíz, Harkány and Szigetvár. Besides the above-mentioned spas there are some smaller, less developed baths in the region which have not yet determined their profiles or target groups.

Water-based tourism, with the exception of bathing, is not traditionally offered in the area except along the Hungarian rivers where kayaking tours are very popular. Almost all clean and calm waters in the area, both on rivers and on lakes, are used for bathing, especially near larger towns, but other items of the water-based offer are currently relatively limited.

In Croatia the demand for water-based tourism besides bathing is very small and almost exclusively domestic, with many Croatians in fact frequenting the better locations for water-based tourism in neighbouring Slovenia and Hungary. This is also mostly bathing tourism in spas, characterised by a heavy dependence on day trips. The majority of areas suitable for water-based activities except for spas are poorly equipped even with basic facilities and in many cases there are no catering facilities.

Priorities

The following development priorities for water based tourism in Zone B of the programme area can be set:

- Development of water-based tourism in line with sustainability principles;
- Ensuring visitor safety – clearing eventual remaining mine fields, provision of complete information regarding eventual mine fields, furthermore lifeguard services in main bathing areas must be ensured;
- Upgrading of facilities and services creating an experiential value chain for visitors;
- Upgrading of infrastructure for water-based tourism – continuous investment in adequate water sport facilities and recreational sections;

- Upgrading of human resource capacities – training programme for diverse groups of service providers, information sharing services, awareness raising programmes.
- Development of attractive water-based tourism destination images. The Danube-Drava National Park can play a significant role in the development of the 'green' or 'eco' image of the destination.
- Increasing visitor spending all year round.

Development needs
Nature conservation and heritage protection
<ul style="list-style-type: none"> - Master planning of further development of water-based tourism. This type of planning is to be carried out within the scope of regular spatial planning activities in the area's counties. - Production of guidelines for the environmentally sensitive building of facilities for water based tourism.
Human resources development
<ul style="list-style-type: none"> - Training programmes in guest relations for water-based tourism managers. - Training programmes in tourism entrepreneurship for water-based tourism managers. - Specialised training programmes for water-based tourism holiday- and tour organisers; brief training for DMO-s interested in offering water based tourism products. - Specialised training programmes for organisers of rafting and kayaking.
Attraction development
<i>Further upgrading of tourism offer along the big rivers Mura, Drava and Danube</i>
<ul style="list-style-type: none"> - Using the model of the Osijek 'Copacabana', other existing and/or new locations offering various water based activities on big rivers could be equipped in a similar manner. These areas should be equipped with proper recreational, entertainment and F&B facilities. Particular attention should be paid to additional visitor services, namely the provision of various sports, i.e. possibilities for renting boats and the offering of rafting and kayaking tours. During the development of the attractiveness of the destinations it should not be forgotten that these areas are very sensitive from an ecologic point of view, therefore the upgrading process has to minimise the negative

Development needs
<p>externalities.</p> <ul style="list-style-type: none"> - Keeping in mind the importance of three big rivers in Europe, one of the locations could be chosen for a specific 'river museum'. Such a museum could be combined with a visitor centre for the whole Regional Park Drava-Mura in Croatia and could include a variety of interactive and viewer-engaging features.
<i>Further upgrading of tourism offer on lakes</i>
<ul style="list-style-type: none"> - Even the best maintained lakes in Hungary and in Croatia need upgrading to ensure they meet the needs of the tourists. - The lake areas should be equipped with proper recreational, entertainment and F&B facilities. Particular attention should be paid to additional visitor services, i.e. possibilities for renting boats, pedal boats, surfing equipment etc. Such visitor services could also be provided at lakes which are not suitable for swimming.
<i>Upgrading of visitor information and interpretation aspects of water-based tourism in areas near the big rivers</i>
<ul style="list-style-type: none"> - It is suggested to improve general signing and interpretation features in the most important locations. Interpretation panels should include detailed outdoor- and printed maps of the regions; view points and picnic zones should be assigned. Visitor facilities should be managed in a manner which would allow for a quality interactive experience of visitors (e.g. limiting numbers of visitors at certain locations, if necessary). - The proposed extension of stretches suitable for rafting and kayaking on the river Drava to the Eastern part of the programme area in Virovitičko-podravska and Osječko-baranjska Counties could support longer rafting- or kayaking holidays. - Other routes connected with water based tourism – besides 'pure' rafting and kayaking, combined water-land (e.g. rafting, kayaking and bicycling or trekking) items could be introduced along the already partially functioning Drava route.
<i>Upgrading interpretation</i>
<ul style="list-style-type: none"> - Posting of 'brown signs' – the locations that could merit the posting of such signage are mainly protected areas along the big rivers. Especially important could be the proposed UNESCO World Heritage Roman Danube limes site interpreting the numerous remnants of the Roman Empire along the Danube.

Development needs

- Posting of direction road signs to water-based tourism facilities on major transportation routes in an orderly and easily readable manner (e.g. 'totem poles' or other types of groupings).
- Posting of interpretation boards which offer basic information about a certain location or sight, conveying its significance. Interpretation boards of varying sizes and information content could be placed in many areas near the big rivers or lakes. In addition to information about particular aspects of the sight, interpretation boards should also focus on other features of the broader location and on information about the region itself (e.g. maps, region information).
- Tourist maps of water-based tourism sights, routes and services. Instead of regions, it is more useful to have precise maps of particular rivers, namely Mura, Drava and Danube, covering the entire river flow. Maps should be made available on site, in printed form at different tourism facilities, and should also be available on electronic media.

Services development

- The upgrading of existing accommodation facilities, their reconstruction or refurbishment and even conversion of other types of buildings, especially those out of use, into accommodation facilities (e.g. old army barracks) should be favoured over new constructions, as a means of protecting, and not encroaching upon, sensitive natural areas.
- All accommodation facilities should provide storage areas for sports equipment (canoes, kayaks). Accommodation facilities should also consider renting bicycles.
- Further development of the F&B offer should include the upgrading of existing- and the opening of new facilities. The accent should be on traditional restaurants and country inns offering traditional, authentic and healthy food using local produce.
- Transport development entails three basic courses of action: (1) the provision of adequate and safe car parking; (2) appropriate public transport connections from main towns centres, airports and railway stations to starting and ending points of rafting or kayaking tours; (3) organisation of luggage transfers between stopover destinations on a given route, as well as guest transfers (from and to airports, car parks etc.).
- Development efforts should be directed towards creating more accessible distribution points for local products. The range of such products can be very extensive and, considering the 'typical' products of the sub-regions of Zone B, these could include wines and other alcoholic and non-alcoholic beverages,

Development needs
<p>foodstuff and especially meat products (e.g. 'kulen', 'kulenova seka'), canned fruits and vegetables, honey and jams, handicrafts, local herbal teas etc. Included here should also be the more typical tourist souvenirs (e.g. books, posters, cards etc.), as well as specific items connected to rivers or lakes (e.g. small pieces of equipment, memorabilia items).</p>
Promotion and sales
<ul style="list-style-type: none"> - Incentivising existing and/or new DMO-s in offering water-based tourism products. These incentives could entail assistance in putting together travel packages and/or itineraries, establishing contacts with various service providers, reduced-rate or free participation in specialised training programmes etc. - Water-based tourism opportunities should be jointly promoted, featuring Zone B of the programme area as a single water-based tourism destination, but also in particular counties. The major destination and the water-based tourism image bearer, being thus the focus of promotional activities, is the area of the Mura-Drava Regional Park, i.e. the flow of three big rivers in the area. - Joint promotional activities should include: (1) various PR activities, including study trips for travel organisers and travel writers, presentations at relevant fairs and exhibitions; (2) publication of various printed materials, including a map of the area; (3) a website devoted to water-based tourism opportunities, featuring also other complementary products; (4) limited advertisements in specialised publications or in catalogues of specialised travel intermediaries. - The various promotional materials should present water-based tourism from the customer's perspective, including information relevant to potential visitors, and should clearly indicate the benefits of the product. - There should be a clear link between the above and promotional materials featuring other products of the area achieved through joint design and visual identity elements.

The growth of water-based tourism can be projected throughout Zone B in almost all counties in Croatia except for Bjelovarsko-bilogorska and Požeško-slavonska Counties. **Osječko-baranjska County stands out** as the most attractive sub-region for water-based tourism, with large areas of the Drava and Danube being suitable for all kinds of water sports, potentially popular with a large local and domestic market. This county **can therefore be considered as the product 'leader'**.

It is to be followed by Koprivničko-križevačka County having the largest stretch of the river Drava in its natural state and the best possibilities for water sports on lakes.

On the Hungarian side, the sub-regions along the rivers (Mura, Drava and Danube) and the Nagykanizsa-Zalakaros sub-region as the most attractive spa destination in the programme area are suitable for the upgrading of all kinds of water sports. The bigger lakes like Sárberki and Deseda can be interesting for further tourism development.

3.4.3 Plan for hiking and trekking tourism

Current product characteristics

There is a broad network of trails, including educational ones, which are generally well marked and regularly maintained. Especially popular and relatively well developed are the Mecsek, central Papuk, Ivanščica and Ravna Gora. In fact, Papuk is one of the highest quality hiking destinations in Croatia both in terms of its natural attractiveness, including the unique Papuk Geopark, and in terms of its hiking infrastructure, ranging from trails to accommodation.

On the other hand, the demand is currently mostly local and almost exclusively domestic. There is a heavy dependence on local hiking clubs and generally on day trips. This is even the case with the highly attractive Papuk Nature Park which is still oriented mainly toward day visitors from Osijek and other towns in Eastern Croatia. Throughout the area, many trails need upgrading going beyond basic marking and maintenance, in the direction of visitor services ranging from spatial interpretation to higher quality catering and accommodation.

Hiking and trekking are potentially appealing to a broad market. Main market segments are, however, middle-aged or elderly individuals of higher income and educational level, usually travelling in couples or with groups of friends. Younger individuals and families with children are also interesting segments, especially in case of shorter educational trails. For the most part, these are individual tourists or special groups (hiking clubs). **Hiking and trekking are popular throughout the whole year (except for the winter), with the late spring and early fall months being considered the 'high season'.** Hiking and trekking tourism is considered one of the most environmentally responsible forms of tourism.

Priorities

The following development priorities of hiking/trekking tourism in Zone B of the programme area can be set:

- Development of hiking and trekking facilities and services is to be environmentally sensitive;
- Ensuring visitor safety – very clear and complete information regarding the eventually still existing mine fields must be undertaken;
- Upgrading of facilities and services, creating an experiential value chain for visitors;
- Upgrading of hiking/trekking infrastructure, continuous investment in trails, upgrading outdoor interpretation facilities, shelters, rest stops, viewing points, (bilingual) information and maps is necessary;
- Upgrading of human resource capacities – training programmes for diverse groups of service providers, information sharing services, awareness-raising programmes and DMO support are key steps in expanding the knowledge and capabilities of stakeholders;
- Development of attractive hiking/trekking destination images;
- Product and sales capacity improvements are necessary to generate increases in visitor spending.

Development needs
Nature conservation and heritage protection <ul style="list-style-type: none"> - Master planning of the further development of hiking and trekking tourism. These hiking/trekking tourism master plans must be complementary with other tourism product developments and must form a part of the regular spatial planning activities in the area's counties. - Production of guidelines for the environmentally sensitive building of hiking/trekking facilities, disseminated both in written form and during verbal consultations at mountaineering associations and clubs; - Setting up of incentives for adherence to the environmentally sensitive building of hiking/trekking facilities. Such incentives could range from loans, grants and co-financing schemes to 'in kind' incentives such as free consultation services.
Human resources development

Development needs

- Training programmes in guest relations for service providers to hikers/trekkers (e.g. visitor centre, accommodation, catering, retail owners/managers and staff). Programmes should focus on host-guest relations and on the provision of services covering several topics such as e.g. needs and expectations of different market segments to be potentially targeted for hiking and trekking, organisation of attractive and different hiking/trekking tours etc.
- Training programmes in tourism entrepreneurship for hiking/trekking managers.
- Specialised training programmes for hiking holiday- and tour organisers – brief training for DMO-s interested in offering hiking/trekking tourism products, covering topics such as e.g. characteristics and success factors of hiking/trekking tourism, needs and expectations of hiking/trekking tourists, contacts with relevant international tour operators and/or specialised agents.
- Specialised training programmes for hiking guides – covering topics such as e.g. needs and expectations of different market segments to be potentially targeted for hiking and trekking, communication between hosts and guests, guest safety and first aid etc.

Attraction development

- Expansion of the network of hiking paths; additional efforts in the marking of trails should be undertaken; also important is the provision of signboards with distance and assumed time to particular locations; both- outdoor and printed detailed maps of the area are necessary.
- Upgrading of visitor facilities along paths. In Croatia, reactivating the already existing mountain lodges and construction new ones. In Hungary, development of rural accommodation facilities adapted also to hikers/trekkers in the hilly areas. Building of viewing points with picnic areas and posting of interpretation panels is an important additional activity.
- Provision of additional services, namely innovative interactive guided tours. Depending on location, such facilities could be diverse, even of 'full service' type, intended for the general public, or very basic, intended for devoted hikers.
- Emphasising the 'highlights' of the offer. Keeping in mind the importance of Papuk as Croatia's only Geopark with many volcanic phenomena, this is arguably an appropriate location for a small museum dedicated to the geology of volcanoes. Such a museum could be combined with the Park's visitor centre and could include a variety of interactive and viewer-engaging

Development needs

features.

- Extension of the Trans-European E7 long-distance trekking path through Croatia. A section of this path currently goes through the lowland and hilly areas of Hungary (partially in the programme area), while an alternative, more physically demanding direction could be provided if the path were to be also extended through Croatia where it would actually connect the mountains of Zone B. This could support multi-day hiking holidays.
- There are other opportunities for long-distance, multi-day hiking and trekking trips mainly in the most attractive mountain areas of Ivanščica and Papuk. In Hungary, the development of the services and programmes in localities along the so called 'Blue Trail' and 'Red Trail' could encourage multi-day trekking trips. It would be particularly interesting for the hilly areas (Zselic, Zala) which are currently receiving significantly less attention from hikers and trekkers than the mountains.
- There are many shorter hiking and educational paths throughout Zone B of the programme area maintained by local mountaineering associations or municipalities, such as the more demanding 'Count's trail' and 'Lapjak trail' on Papuk, the easy educational trails 'Murščak' on the banks of the Mura river and 'Pisanica green eco-ethno path' in Bjelovarsko-bilogorska county. There are some short educational paths also in the Hungarian protected areas. On this basis it is possible to create some thematic networks labelled for example as 'eco-treks' or 'bird-spotting trails' (especially along the rivers and other wetlands). Further development of such systems of short, educational trails should be encouraged.
- Posting of 'brown signs' pointing to major sights interesting for hikers – some locations could merit the usage of such signage: Rupnica geological phenomena, Ružica and Kalnik old town ruins, Ivanščica peak, the present and future visitor centres of the Danube-Drava National Park, as well as the especially attractive educational paths of Murščak by the Mura river.
- Posting of direction road signs to hiking/trekking facilities – Direction signs to all hiking/trekking facilities should be posted on major transportation routes, especially toward fully equipped mountain lodges and attractive viewpoints.
- Posting of interpretation boards which offer basic information about a certain location or sight, conveying its significance. Interpretation boards should also focus on other features of the broader location and on information about the path itself (e.g. maps, area information etc.).
- Tourist maps of hiking/trekking sights, trails, routes and services. Instead of regions, it is more useful to have precise maps of particular mountains, especially for Papuk and Ivanščica, covering entire mountain destinations.

Development needs
<p>Maps should be made available on site, in printed form at different hiking/trekking facilities, at visitor centres and tourist information points and at establishments catering to hiking/trekking tourists. Maps and guides should also be available as downloadable PDF-files. It is strongly recommended to introduce the next generation of tourist maps and guides, namely the maps for GPS-devices with route planning capabilities, as well as some specific applications for smart phones.</p>
Services development
<ul style="list-style-type: none"> - Upgrading of existing accommodation facilities, their reconstruction or refurbishment and even conversion of other types of buildings, especially those out of use, should be favoured against new constructions, as a means of protecting and not encroaching upon sensitive natural areas. Accommodation facilities, regardless of type, wishing to attract hiking/trekking tourists could be jointly branded. - The further development of the F&B offer should include the upgrading of existing- and the opening of new facilities. The accent should be on mountain lodges and country inns offering traditional, authentic and healthy food using local produce and especially game and fish. - Transport development entails three basic courses of action: (1) the provision of adequate and safe car parking, especially for those tourists going on longer hiking/trekking trips; (2) appropriate public transport connections from main towns centres, airports and railway stations to starting and ending points of hiking/trekking tours; and (3) organisation of luggage transfers between stopover destinations on a given hiking/trekking route, as well as guest transfers (from and to airports, car parks etc.). - Development of more accessible distribution points for local products. These could encompass specialty shops, souvenir shops, but also local farmers' markets, farms and wineries themselves, not to mention accommodation, F&B establishments, visitor centres and museums. Producers should take into account the need for special, 'traveller friendly' packaging.
Promotion and sales
<ul style="list-style-type: none"> - Incentivising existing and/or new DMO-s to put together and offer to potential visitors or other intermediaries a variety of hiking/trekking tourism products. These products could include various tours ranging from traditional trekking- to thematic tours dealing with geology, wildlife, history and religion. There could also be a line of 'combined' hiking products, e.g. 'hiking & wellness', 'hiking & history', 'hiking & riding' etc.

Development needs

- Hiking/trekking tourism opportunities should be jointly promoted featuring Zone B of the programme area as a single hiking/trekking destination.
- The three major destinations and the hiking/trekking image bearers, being thus the focus of promotional activities, are the Mecsek mountain, the Papuk Nature Park and Ivanščica. Joint promotional activities should include: (1) various PR activities, including study trips for travel organisers and travel writers, presentations at relevant fairs and exhibitions; (2) publication of various printed materials, including a hiking/trekking atlas of the area with small maps of most interesting hiking zones; (3) a website devoted to hiking/trekking tourism opportunities, featuring also other complementary products; (4) limited advertisements in specialised publications or in catalogues of specialised travel intermediaries.

Principal locations relevant for the development of hiking and trekking tourism in Zone B of the programme area in Croatia currently include: (1) two primary mountain zones around the mountains Papuk in the East and Ivanščica in the West; (2) two secondary mountain zones around mountains Kalnik and Bilogora in the central part of the programme area; and (3) some scattered smaller areas with hiking trails in the remaining smaller hilly areas around some larger towns and near the big rivers. In addition, there are some hiking zones in the remaining hilly areas, especially in the wine-growing regions of Upper Međimurje, around Štrigova in Međimurska County and in Osječko-baranjska County. There are also some hiking paths in the Kopački rit Nature Park, near the Drava, the Mura and the Danube in general and around some larger towns such as Varaždin, Koprivnica and Vinkovci.

In Hungary the principal locations relevant for development of hiking and trekking tourism in Zone B of the programme area currently include: (1) the highly popular mountain zone of Mecsek; (2) the hilly areas of Zselic, Zala (with the Gőcsej ethnographic region) and Villány; and (3) smaller areas with hiking trails near lakes and close to the big rivers. The tourists visiting the trails of the area are individuals interested in the different recreational possibilities offered by the natural environment (e.g. walking, hiking, cycling, fishing, bird/animal watching).

3.4.4 Plan for equestrian tourism

Current product characteristics

Equestrian tourism potentially appeals to a broad market with tourist packages being offered for groups as diverse as families, professionals and absolute beginners. Its main target markets are, however, younger and, then, empty nester couples with higher education levels, above average income, with at least some riding experience and with a high level of specific spending. The Lipizzaner State Horse Farm (Đakovo, Osječko-baranjska County) is an outstanding tourism attraction and one of the most important cultural landmarks of the county and of Zone B as a whole. The farm registered around 20.000 visitors in 2010.

The other well-known equestrian and agricultural complex in Croatia is Višnjica Estate (in the vicinity of Slatina in Virovitičko-podravaska County). The estate offers sightseeing tours of the stables, riding instruction, pony rides for children, horse-driven carriage rides and riding excursions. The estate registered 3.500 overnights and approximately 10.000 day visitors in 2010. In Bjelovarsko-bilogorska County five riding clubs concentrated in Bjelovar and Daruvar are offering riding classes, endurance and therapeutic riding and a small race track. The county, several towns, municipalities and tourism boards have joined in creating the 'Bilogora mountain horse route' currently spanning 109 km. It links points of interest, resting points and accommodation on local farms. There are three riding clubs in Koprivnica and Križevci. As most of the other equestrian clubs dispersed throughout Zone B, they currently function as sport clubs oriented primarily toward their own members.

The offer of equestrian tourism on the Hungarian side of the programme area is not homogeneous: the range of services spans from small riding schools with a few horses, serving basically local needs, to large horse farms with hundreds of animals and high-level, professional services aimed to satisfy the needs of an international clientele. Nevertheless, most of the establishments are small-sized and many of them offer horse riding as a complementary service. Today there are 26 providers of equestrian services in the Zone B; only two of them reach the maximum quality ('five horseshoes') and none of them has four. According to these figures, **excellent quality is still an exception in the equestrian tourism of the region.** Equestrian tourism in this area has another competitive disadvantage as well: **the lack of long-distance riding tours.**

This product is able to attract a relatively high number of international guests. The main obstacle of its introduction is the limited willingness to co-operate amongst the services providers. **Other important weaknesses of the product offer are as follows:** lack of spatial interpretation elements and visitor services on existing trails;

lack of guides capable of leading horse-riding holidays; lack of sales know-how and/or interest in targeting equestrian tourists; riding clubs and schools oriented predominantly to the local market; weak image of the area as an equestrian destination on international market.

Priorities

The following development priorities of equestrian tourism in Zone B of the programme area can be set:

- Development of equestrian tourism in line with sustainability principles: built facilities should be constructed in accordance with 'green architecture', guest services should be 'eco friendly';
- Defining standards of service and creating (or expanding) an evaluation system in order to properly inform potential guests and to give feedback to service providers about their performance. The wider and more consistent application of the Hungarian 'horseshoe system' is a promising way for a better quality management;
- Upgrading of facilities and services creating an experiential value chain for visitors – investment in diverse equestrian facilities, as well as linkages with complementary services are prerequisites for ensuring the product's competitiveness;
- Training programmes for diverse groups of service providers, information sharing services, awareness raising programmes and DMO support are key steps in strengthening the knowledge and capabilities of stakeholders;
- Development of attractive equestrian destination images – 'specialist' sub-regions need to assert their position, establishing themselves as attractive and quality equestrian destinations;
- Increasing visitor spending all year round with product and sales capacity improvements.

Development needs

Nature conservation and heritage protection

- Master planning of further equestrian tourism development. Master plans should ensure: (1) that new facility development minimises the intrusion of built facilities into the natural landscape; (2) that riding paths use existing rural paths, abandoned railroad tracks or are, in general, laid out in such a manner which minimises the using up of additional natural landscape.

Development needs
<ul style="list-style-type: none"> - Production of guidelines for the environmentally sensitive building of equestrian facilities. These guidelines could be 'equestrian tourism specific', but are also part of a broader initiative guiding environmentally sensitive building in tourism in general. - Setting up of incentives for adherence to the environmentally sensitive building of equestrian facilities. Such incentives could range from financial stimuli including, for example, loans, grants and co-financing schemes to 'in kind' incentives such as free consultation services.
Human resources development
<ul style="list-style-type: none"> - Training programmes in guest relations for equestrian farm and club owners and/or managers. Programmes should focus on host-guest relations and the provision of services covering several topics as e.g. needs and expectations of different market segments; organisation of attractive tours, excursions and horse riding holidays; communication between hosts and guests etc. - Training programmes in tourism entrepreneurship for equestrian farm and club owners and/or managers. - Specialised training programmes for riding-holiday organisers. Brief trainings for DMO-s and, eventually, local tour operators interested in offering equestrian tourism products, covering topics as e.g. success factors of equestrian tourism and characteristics, needs and expectations of equestrian tourists; contacts with relevant international tour operators and/or specialised agents etc. - Specialised training programmes for riding guides and tour guides at clubs and horse farms, covering topics as e.g. needs and expectations of different market segments; communication between hosts and guests (including children); technical issues concerning the organisation and realisation of tours; guest safety and first aid etc.
Attraction development
<ul style="list-style-type: none"> - Further upgrading of the major horse farms and estates: upgrading of existing accommodation quality; construction of an 'equestrian camp' and/or playground for children; reconstruction of stables and manure disposal facilities; grounds beautification work; purchasing additional assets such as horse carriages. - Development of additional visitor services e.g. tours without prior reservation and provision of innovative interactive guided tours. Creative merchandising, including a variety of informative and educational materials, should ensure

Development needs

that souvenir shops become an important revenue generating centre.

- Development of a small museum with a variety of interactive and viewer-engaging features, dedicated to the Lipizzaner breeding and riding tradition in Đakovo.
- In Zone B there are several (mostly abandoned) 'pustara' and 'tanya' (old cattle pasture grounds and other agricultural establishments) with tourism potential but no existing services. Their revitalisation in a manner in which they would thematically complement each other could increase the overall attractiveness of the area as an equestrian tourism destination.
- Further upgrading of visitor facilities and services at horse riding clubs. The services could include: guided tours of the stables, 'how to' tours during the course, 'pony petting' for children, pony rides, carriage rides, F&B services at 'do it yourself' grill- or picnic grounds, a souvenir shop with memorabilia, and also educational materials.
- The availability of riding trails, preferably with a theme, is among the most important attractions at equestrian destinations. Long distance routes (riding trails which support multi-day horse riding holidays) could include: (1) the Drava-Danube route (200 km long); (2) the Hungary-Adriatic route, extending riding trails from Hungary (Keszthely-Nagykanizsa-Berzence) over the Bilogora mountain to Bjelovar and further on towards the Adriatic; (3) the Gemenc-Őrség route, connecting the most attractive hilly and mountain landscapes on the Hungarian side.
- Longer circular and linear routes linked to existing major riding destinations and/or centres in Croatia could include: (1) the already existing 'From pustara to pustara' route which could be extended to 69 km of trails, partially also along the Drava; (2) the 'water route' which would more closely follow the Drava river looking westward; (3) the 'flower route' offering riding through fields with medicinal herbs and through orchards. In the Bjelovar area there are the following further routes: (1) the 'Pisanica eco-ethno' route spanning 52 km and linking ecological food producers; (2) the 'Gypsy caravan' trail which is a proposed tour for visitors including riders and carriages; (3) the 'Hidden treasures of the Veda' including a treasure hunt in the Bilogora forests inhabited by the mythological 'Veda'.
- The Hungarian part of Zone B offers various possibilities for multi-day tours, both circular and linear ones. Zala County is very suitable for the organisation of some relatively easy tours, with low to average daily distances to cover. With an extension to the Őrség region, it is an ideal area for 'eco-ethno' tours. In the Eastern part of the Zone B, it is possible to set up a longer circular tour, passing through Orfű, Siklós, Villány, Bóly and Mohács.

Development needs

- Linear tours can be realised covering any section of the above-mentioned long-distance tour. There are excellent possibilities to link the riding centres of Zone B to external destinations as well. Examples include the following tours: (1) Nagykanizsa-Keszthely (and further on to the Balaton Uplands); (2) Siklós-Pécs-Kaposvár (and further on to the Southern shore of Lake Balaton); and (3) Mohács-Baja (with a possible extension to the Great Plain in Hungary).
- Posting of 'brown signs' pointing to major equestrian sights such as the Đakovo Lipizzaner State Horse Farm. New locations should be considered as well, such as the Őrség-Gemenc long-distance route.
- Direction signs to all equestrian facilities should be posted on major transportation routes.
- Posting of interpretation boards which offer basic information about a certain location or sight, conveying its significance. Interpretation boards of varying sizes and information content could be placed within riding centres and along riding trails.
- Tourist maps of equestrian sights, trails and services. These maps should be made available in printed form at different equestrian facilities, visitor centres and tourist information points, furthermore at establishments catering to equestrian tourists. Maps and guides should also be available as downloadable PDF-files. It is strongly recommended to introduce the next generation of tourist maps for GPS-devices with route planning capabilities and some specific applications e.g. with description and photos of protected species. Such electronic material should be freely available on the destination's tourism website.
- Special guides – since high-income customers are overrepresented among equestrian tourists, it is worth calling their attention to the best shopping possibilities of the region, concentrating on the local products. It is recommended to create a 'Connoisseurs' Guide to local arts, wines and handicrafts', both in printed and on-line version, as well as in the form of an application for smart phones.

Services development

- Upgrading of existing accommodation facilities, their reconstruction or refurbishment and even conversion of other types of buildings, especially those out of use, should be favoured as opposed to new constructions, as a means of protecting and not encroaching upon sensitive natural areas. Equestrian tourists show a preference for small, high-atmosphere and charming types of accommodation. Being close to the stables can be a very important feature for many riders. In this case, the eventual negative

Development needs

consequences (smells, flies) must be adequately treated. Accommodation facilities, regardless of type, could be jointly branded as e.g. 'bed and ride' facilities. As such, they would have to adhere to some common standards. It is particularly important to take care of the quality assurance of different accommodation facilities, especially if they are included in the route of a riding tour.

- The development of the F&B offer should include the upgrading of existing- and the opening of new facilities offering an attractive mix of establishment and cuisine types, ranging from simple country inns to fully catered restaurants. The accent should be on traditional and authentic cooking using local produce. Riding tours could require some outdoor meals such as picnic lunches – the providers are expected to be able to prepare such meals in good quality.
- Transport development entails two basic courses of action: (1) the provision of adequate and safe car parking (the parking zone must be large enough to allow manoeuvres with horse trailers); (2) the organisation of luggage and equipment transfers between stopover destinations on a riding route, as well as guest transfers. Transport development can be a common interest of more riding centres or accommodation providers, therefore their long-term co-operation should be encouraged.
- Development of more accessible distribution points for local products. These could encompass speciality shops, souvenir shops, but also local farmers' markets, farms and wineries, not to mention accommodation, F&B establishments, visitor centres and museums, or the riding centres themselves. Producers should take into account the need for special, 'traveller friendly' packaging.

Promotion and sales

- Incentivising existing and/or new DMO-s to put together and offer potential visitors or other intermediaries a variety of equestrian tourism products. These products could include visits to riding clubs and centres, stays and riding in such destinations, therapeutic riding, children's riding camps, riding holidays etc. There could also be a line of 'combined' riding products, e.g. 'riding & wellness', 'riding & wine' etc.
- Equestrian tourism opportunities should be jointly promoted featuring Zone B of the programme area as a single equestrian destination. Product information from major image-making providers should be supplemented by that of smaller clubs throughout the area, along with information on specialised intermediaries and on other complementary products, portraying the area as a complex tourism destination. Joint promotional activities should

Development needs

include: (1) various PR activities, including study trips for travel organisers and travel writers, presentations at relevant fairs and exhibitions; (2) publication of various printed materials, including an equestrian image-info guide and a riding map; (3) a website devoted to equestrian tourism opportunities, featuring also other complementary products; (4) limited advertisements in specialised publications or in catalogues of specialised travel intermediaries.

Equestrian tourism is seen as a niche product with significant development potential. Its growth can be projected throughout Zone B, on its Croatian side particularly in Bjelovarsko-bilogorska and Koprivničko-križevačka Counties and especially in Virovitičko-podravska and Osječko-baranjska Counties, with the latter becoming product 'leaders' in Zone B of the programme area. In Hungary, the sub-regions of Pécs-Mecsek, Zselic-Szigetvár and Zalai dombvidék offer the best development possibilities, closely followed by other hilly areas.

3.5 Marketing communication and promotion

The developing of a regional tourism marketing information system (TMIS) is needed in order to establish the marketing communication activities and to assure their efficiency. As a part of this:

- **an internal information collecting system has to be started** to be able to measure the achievements of regional tourism and to measure its operational specialties,
- **an external observing system has also to be put into action**, measuring the exposition, judgment and image of the area and its tourism products, and
- **a marketing research system has to be developed as well** in order to establish certain tasks, problem-solving decisions and certain activities that could be helped by an analytical elaboration using professional methodology.

The GIS system that was compiled during the course of the RTPP project offers a suitable starting point for the integrated tourism computer database inside TMIS. The latter would be essentially refreshing and expanding it continuously. **A regular and coherent measuring system or process would effectively accomplish the monitoring of regional expansion in the field of tourism.**

The promotion activities consist of two main parts: internal and external promotion. The following table summarises **the objectives, target groups and instruments of internal promotion:**

Target groups	Objectives	Instruments
<i>Local governments</i>	<ul style="list-style-type: none"> - motivating partnerships - inspiring expansion-friendly settlement policy - introducing application/tender opportunities 	<ul style="list-style-type: none"> - trainings - panel discussions, meetings - action programmes
<i>Local inhabitants</i>	<ul style="list-style-type: none"> - forming the inhabitants' approach towards local values - forming the inhabitants' approach towards the settlement engaging in tourism development - forming the inhabitants' approach in relation to the effects of tourism 	<ul style="list-style-type: none"> - promotional publications - trainings - panel discussions - collective programmes of the related settlements - informative articles in the local media
<i>Local service providers</i>	<ul style="list-style-type: none"> - forming approaches - motivating partnerships - introducing application opportunities 	<ul style="list-style-type: none"> - trainings - panel discussions, meetings
<i>DMO-s</i>	<ul style="list-style-type: none"> - motivating partnerships 	<ul style="list-style-type: none"> - trainings - panel discussions, meetings
<i>Local tour operators</i>	<ul style="list-style-type: none"> - motivating partnerships 	<ul style="list-style-type: none"> - panel discussions, meetings - action programmes

In order to reach the above-mentioned goals, the applying of the following instruments is suggested:

- Informative articles in the local media – it is very important for internal stakeholders to receive relevant information and news first hand, from the organisers, not from the publicity materials developed for visitors.
- Panel discussions – it is key to organise different meetings and panel discussions for the ones involved in order to draft the ideas and demands.
- Trainings – this instrument is essential for each target group, being partly necessary to catch up (to get to know the continuous need for renewal and to track the latest trends).

- Personal experiences – e.g. organising domestic and foreign study tours with the aim of getting to know already well functioning methods; visiting tourism fairs etc.
- Promotional publications – introducing the co-operation of other sub-regions and regions related to financial or other matters.
- Events – providing opportunities to make friends and/or business partners and to build and preserve partnerships that can be an important driving force in future co-operation.
- Action programmes – in case some of the concerned actors already have a closer co-operation. Such programmes can be directed at the elaboration of a qualification system in the area, e.g. regarding accommodation or oenology.

The following table introduces **the objectives, target groups and instruments of external promotion:**

Target groups	Objectives	Instruments
<i>Visitors</i>	<ul style="list-style-type: none"> - arousing their interest - informing them - convincing them 	<ul style="list-style-type: none"> - regional website - advertising - social media - public relations (PR) - publications, brochures
<i>Service providers / investors</i>	<ul style="list-style-type: none"> - informing them - bringing investment incentives - networking 	<ul style="list-style-type: none"> - press conferences - printed media - PR
<i>National and regional DMO-s</i>	<ul style="list-style-type: none"> - creating co-operation incentives 	<ul style="list-style-type: none"> - regional website - PR
<i>Tour operators</i>	<ul style="list-style-type: none"> - purchasing sights and services, organising packages 	<ul style="list-style-type: none"> - regional website - travelling exhibitions and fairs - promotional tours
<i>Professional travel writers</i>	<ul style="list-style-type: none"> - informing them - arousing their interest 	<ul style="list-style-type: none"> - press conferences - printed materials for the media - study tours

In the interest of reaching the above-mentioned goals the following instruments are suggested:

Advertising – The classical advertising approach has only a limited role. The owners' websites, publications, PR work, and lately, social media are of ever-growing importance. Paid advertising can be published in the following forms and places:

- The internet – as a marketing instrument; presence or link on other websites.
- Direct mail – in case of the programme area this instrument is suggested only for sending reminding messages instead of advertising and sending newsletters through post or e-mail.
- Posters (in city-poster size) – it is expedient to create a poster series based on a consistent visual strategy where each poster presents one of the possible pastime activities that can be exercised in the area.
- Billboards – as for content and timing, these are similar to the previous point.
- Newspaper ads – although relatively expensive, they can be effective instruments. If placed, they should appear in travel-, lifestyle-, sport- and motorcar magazines. Media with relatively high prestige should be chosen in order to match to the status of the targeted customer.
- Television advertising – prime time advertising should not be used because of its high price. The selectively targeting thematic channels are more affordable, although they have also smaller audiences.

Sales promotion – In case of the regional sales activity an emphasis has to be put not primarily on direct market work but more on **a supporting and co-ordinating role**. In order to manage the most efficient sales activity the achievement of the following tasks in the area will be indispensable:

- designing and operating of a regional tourism website,
- regional co-operation,
- presence at travel- and leisure fairs,
- promotional (acquisition-) tours.

PR activities can be quite diverse and generally cannot be planned much in advance as it is the case with commercials. Therefore here the focus has to be on seizing the emerging opportunities quickly. Properly prepared materials (such as press material with background information) and co-operation possibilities that can be quickly activated (for example between the DMO-s and hotels) are needed in order to successfully use the case-by-case chances. Please find below a list of the most

important elements and expected results, taking into account the realistically applicable instruments in the programme area:

- Appearing in printed publications – preferably in magazines about travel, culture, nature, traditions, lifestyle and sports, in the form of journalistic articles and reports.
- Appearing in printed publications with a special offer – primarily in specialised publications which are most likely read by tourism professionals.
- Appearing in guidebooks – it is highly desirable to present the area in guidebooks about Hungary and Croatia according to the re-positioned image.
- Appearing in the publications of the national tourism offices – and also in other national and regional publications.
- Inviting ‘moving’ events into the programme area – positive media coverage can be ensured for the area by televised events such as illustrious sporting competitions or other gala events.
- Appearing in televised shows – important to be able to introduce the events and landscapes of the Hungarian and Croatian side of the border region.

Social media (‘organised’) – Today internet connectivity is widespread, surfing the net is already an everyday activity among the majority of people. Different kinds of social websites have a growing role in communication, some of them aim to even substitute e-mailing in the future. Based on these developments the following arrangements are suggested, among others:

- Establishing new, tourism-related and area-specific on-line communities or clubs and advertising them on the most-visited websites.
- Encouraging participation in on-line PR, organising games, quizzes and competitions (e.g. related to photography), applying of ‘guerrilla marketing’.
- Organic connections to the site – direct references must lead the viewers from the regional website to the developed social website and vice versa.

Social media (‘independent’) – The social media significantly expanded the available range of accessible opinions as internet users come into contact with innumerable acquaintances on the web. The opinion of virtual acquaintances is not as reliable as eventual personal ones, still they have substantial influence. The following website types can be primarily targeted to promote the programme area: blogs, panel discussions, photo uploads, certification (trip-advising) pages. Some suggested arrangements are the following:

- ‘Press observation’ – continuously scanning the most visited social websites, collecting and evaluating significant comments about the programme area.

- Placing links on homepages – collected contents can be placed as references on the regional websites after filtering them according to certain criteria and classifications.
- Collecting best content – placing it as references on the home pages.
- Inspiring the writing of positive blog posts – e.g. by inspiring individuals to write travel reports.

4. INDICATIVE LIST OF ELIGIBLE ACTIVITIES AND PARTNERS PER ACTION

4.1 Introduction

4.1.1 Excerpts from the Programme Document related to tourism development

During the planning of your joint tourism project, as a basic premise **please bear in mind at all times the vision of the Hungary-Croatia IPA CBC Programme**, quoted from the Programme document in the following:

'In our vision the Hungarian-Croatian border zone will be the SUCCESSFUL CO-OPERATION REGION OF JOINT HERITAGE where:

- *intense and sustainable eco-oriented tourism is an important source of income for inhabitants of border settlements;*
- *the natural and cultural values are well identified, maintained and utilised actively in a sustainable way;*
- *people have strong regional identity and environmental responsibility, have wide knowledge on the natural values of their region and global climato-environmental processes, and are proud of their region, thus being committed to protect and develop the local regional heritage;*
- *more and more people have regular personal contacts crossing the border due to business, job-related, cultural or private life motivations;*
- *an increasing proportion of the citizens on both sides readily use each other's languages, and where the area is visitor friendly in terms of bilingual information provision;*
- *on the basis of intense cultural interactions there is remarkable multicultural activity in arts and other elements of cultural life, which is increasing tourism and deepening regional identity of the inhabitants;*

- *co-operation among businesses, academics and public authorities covers various fields of region specific traditions, innovations, joint products, natural values, and other activities, which utilise special features of the region;*
- *on the basis of heritage based growing economy the living standard is significantly increasing and the underdeveloped micro-regions make good progress in closing up.*

The developments of the future ought to contribute to those processes which lead to the fulfilment of this vision.'

In addition to this vision, **the Programme Document formulates five specific objectives as well**, from which the following can be regarded as most relevant for planned tourism development projects:

'1) Increasing environmental stability and attractiveness of the Drava Valley and surrounding natural and rural areas

The natural heritage of the region should not only be protected but also has to be developed from the sustainability and attractiveness point of view in order to extend the ecological, touristic and local benefits of this resource. Moreover, common responsibility must be taken for the protection and improvement of biodiversity. To achieve an environmentally sound and longer term development planning which identifies the limits and potential for environmentally sustainable development, in particular for tourism, legal and agreed management requirements for the Drava Valley as well as possible risks that could derive from climato-environmental challenges have to be taken into account.

[...]

2) Creating sustainable joint regional tourism product of the Mura-Drava-Danube zone and in surrounding natural and rural areas

The rich natural and rural heritage of the region can be utilised if the services provided for visitors and proper infrastructure will be established. It is also important that they are organised in a single harmonic system along with the elements of attractions of the landscape. This system can make the region an attractive destination on the market of eco-, active and rural tourism. However, only sustainable and environmentally friendly ways of tourism can be supported and made possible in the area (e.g. motorised activities of tourism must be forbidden).

[...]

4) Developing and managing common cultural heritage to promote cultural values, traditions and to develop tourism

The cultural heritage should not only be a value to be protected but should also be a basis for development that makes the region more attractive for visiting, living and working. If both sides of the region co-operate, heritage can be better managed and their complex joint thematic networks can be more competitive.'

Finally, when reading the lists of eligible project activities **please be reminded also of the following basic rules set by the Programme Document in connection to Area of intervention 1.2:**

'Only environmentally friendly ways of tourism and recreation can be supported (and allowed in natural and semi-natural areas), motorized activities must be forbidden (e.g. quad, motorboat, jet-ski, off-road activities with motorbike and cars, other damaging open air technical activities).'

'Interventions in tourism have to be related to destinations crossing the border and to the landscape of the Mura, Drava, Danube river valleys. Because of the weak human influence and the unpolluted natural state of these landscapes, an ecotourism approach has to drive all tourism development activities. For cross-border tourism products the related network building must be ensured as well.'

'Cultural interventions have to uphold traditional cultural values, especially the common values of the Hungarian and Croatian ethnic groups of the border region and the culture of minorities living in both countries along the border (German, small south Slavic ethnic groups, Roma), besides deepening the common cultural-historical identity.'

4.1.2 Instructions to the present Chapter

In Chapter 4 of the Handbook you will find for each Action that will be opened by the third CfP an **indicative list** of eligible project activities. The tables also contain **indicative information** on the potential Project Partners.

Note: The current Chapter of the Handbook contains lists of potential project activities for every Action. Of course this Chapter builds on the findings of the RTPP as introduced in the previous Chapter 3, **therefore you are encouraged to browse both chapters** when elaborating your project ideas **since in the following the lists of eligible activities per Action are admittedly only indicative.**

4.2 Eligibility rules for Action 1.2.2

Action 1.2.2 – Development of infrastructure for active and ecotourism in the river border area
Content of projects
<p>The Programme Document foresees in its Chapter 5 the following possible activities under this Action: <i>‘Construction of visitor centres, forest schools, ports, walking paths, cycling routes, village museums, information points, maps, other ecotourism specific services. Development, establishment of rentals: bicycle, boats, other relevant equipment of active and ecotourism.’</i></p> <p>The overall objective of the Action is to create a critical mass of joint infrastructure as a base for the development of a sustainable regional tourism product portfolio in the Mura-Drava-Danube river area and in the surrounding natural and rural areas, and thereby to develop an attractive, cohesive and competitive tourism region. The Action involves i) the development of tourism attractions, ii) the improvement of the basic physical infrastructure enabling to receive visitors, as well as iii) the related services which are complementary to those provided by private sector stakeholders.</p> <p>Tourism infrastructure development should respect the European principles of sustainable development along the Lisbon Strategy and Gothenburg Agenda in order to minimise the negative impacts on the natural and built environment and biodiversity. Special attention is to be paid to the long-term financial viability of the projects to be funded under this Action.</p> <p>Substantial cross-border impacts in terms of the improved permeability of the state border, strengthened co-operation ties between the population on the two sides of the border and better integration of the local labour and economy are considered as a distinct added value.</p>
Indicative list of eligible activities
Eligible activities with works components
<p>The eligible activities involving works components in particular include, but are not limited to, the following:</p> <ul style="list-style-type: none"> - Development of ‘information points’ in towns and attached to out-of-town natural sites to range from central visitor centres, over information booths at transportation hubs to touch-screen info-points. Setting up complex ‘meeting points’ where visitors can overview the whole active tourism offer of

the surrounding area.

- Development of themed 'capillary' cyclotourism routes and paths primarily in Zone B. It is the shorter, 'capillary' routes which are especially suitable for creating themed routes and paths, being easier to organise, but also offering a more 'concentrated' and thus more meaningful experience for the visitors.
- Development of educational cyclotourism routes and paths, exploring a certain theme with emphasis being placed on opportunities for learning about it. The possibilities for visitor participation in some theme-related activity along the route (e.g. apple picking) could increase visitor satisfaction and route attractiveness.
- Development or upgrading of accessibility for bicycles at important sights and attractions. In addition to providing adequate and safe parking for bicycles, safe storage of small luggage items is important.
- Development or upgrading of organised car parking places at bicycling route / hiking-trekking tours' starting points, at several points along the bicycle routes and near public transportation hubs (e.g. train, bus stations), with transfer services to routes or in conjunction with accommodation facilities.
- Development or upgrading of interpretation centres for bird/animal watching, offering information, maps, rental of equipment (e.g. binoculars, boots) and educational activities.
- Development of bicycle and boat rental (and maintenance) facilities.
- Development of more accessible distribution points for local products. These could encompass specialty shops, souvenir shops, but also local farmers' markets.
- Setting up, upgrading and development of accommodation capacity at (ecological) camp sites.
- Upgrading existing- and setting up of new fishing lodges integrated into the surrounding natural environment.
- Creation of paths and resting places for fishermen, integrated in the surrounding landscape.
- Development of environmentally sensitive facilities important for ecotourism, cyclotourism and other active tourism forms, including educational paths, important landscape- and bird watching viewing points, picnic points, shelters for visitors.
- Development of educational trails devoted to bird/animal watching and other related themes within protected areas.
- Development of small museums with a variety of interactive and viewer-engaging features and dedicated to unique natural attractions.
- The development and signing of riding trails (and/or long-distance routes),

preferably with a theme, is among the most important attractions in equestrian destinations. Direction signs to all equestrian facilities should be posted on major transportation routes.

- Development of longer circular and linear routes linked to existing major riding destinations and/or centres.
- Expansion of the network of hiking paths. Additional efforts in the marking of trails should be undertaken and attention should be paid also to the provision of signboards with indications of distance and assumed time to particular locations, furthermore both outdoor- and printed detailed maps of the programme area. Extension of the Trans-European E7 long-distance trekking path through Croatia.
- Upgrading of visitor facilities along hiking paths. In Croatia, reactivating the already existing mountain lodges and constructing new ones. In both countries: the building of viewing points with picnic areas and the posting of interpretation panels is an important additional activity.
- Preservation and upgrading of traditional wooden ferry or barge landings on the Mura.
- Development and/or rehabilitation of river ports, moorings and piers near the Danube, Drava and Mura rivers.
- Posting of 'brown signs' pointing to major sights interesting for hikers.
- Posting of direction road signs to water-based tourism facilities on major transportation routes in an orderly and easily readable manner (e.g. 'totem poles' or other types of groupings).
- Direction signs to all hiking/trekking facilities could be posted on major transportation routes, especially towards fully equipped mountain lodges and attractive viewpoints.
- Posting of interpretation boards and maps which offer basic information about a certain location or sight, conveying its significance. Interpretation boards of varying sizes and information content could be placed in many areas near the big rivers or lakes. In addition to information about particular aspects of the sight, interpretation boards should also focus on other features of the broader location and on information about the area itself (e.g. maps, area information).
- Posting of signs pointing to bird watching sites / interesting viewing points etc.

Where appropriate, **preference is to be given to the rehabilitation of existing buildings and to the re-utilisation of brown field areas**, in order to minimise the involvement of green field territories.

Eligible activities without works components

Important note: Action 1.2.2 is designed to support projects which contain works components, therefore **initiatives of exclusively 'soft project' nature are not eligible for funding.**

Please note that if you plan **non-works activities** next to the compulsory works-related ones, the former will only be supported to **a maximum of 50% of the total project budget.**

Activities without works may include inter alia:

- Development of events dedicated to certain type of plants, animals, biotopes (swamps, beech forests, steppes etc.).
- Development of 'edutainment' type events dedicated e.g. to bird watching and to the preservation of the natural environment.
- Development of tourist maps of water-based tourism sights, routes and services. Instead of regions, it is more useful to prepare precise maps of particular rivers, namely the Mura, the Drava and the Danube, covering the entire river flow. Maps should be made available on site, in printed form at different tourism facilities, and should also be available on electronic media.
- Development maps and guides of cyclotourism routes and paths. Developing of tourist maps of equestrian sights, trails and services. Along with a graphic representation of the routes/paths, information on difficulty level, duration, resting points, accommodation and F&B points, services available for bicycles/riders at stopping points, as well as information on other key features and attractions along the route/path should be included.
- Development of joint promotional activities on cyclotourism and bicycling opportunities / hiking-trekking / equestrian tourism. Joint promotional activities should include: (1) various PR activities, including study tours for travel organisers and travel writers, presentations at relevant fairs and exhibitions; (2) publication of various printed materials, including a cyclotourism and bicycling / hiking-trekking /equestrian tourism image-information guide of the area with maps; (3) a website devoted to bicycling and cyclotourism / hiking-trekking / equestrian tourism opportunities, also featuring other complementary products; (4) limited advertisements in specialised publications or in catalogues of specialised travel intermediaries.
- Development and operating of a special branding and labelling system for accommodation capacities, including camp sites targeting cyclotourists / birdwatchers / hikers / riders.
- Capacity building (training programmes) in guest relations for service providers to cyclotourist / equestrian farm and club owners and/or managers, furthermore providers in other forms of active tourism (e.g. visitor centre,

<p>accommodations, catering, retail owners/managers and staff). Programmes should focus on host-guest relations and on the provision of services, covering several topics such as e.g. needs and expectations of different market segments to be potentially targeted for bicycling/hiking and trekking / water-based tourism etc; organisation of attractive and different hiking / trekking / bicycling tours etc.</p> <ul style="list-style-type: none"> - Capacity building of tour- and holiday organisers. - Capacity building of tour travel guides (e.g. specialised training programmes for organisers of rafting and kayaking / trekking-hiking or for riding guides and tour guides at clubs and horse farms etc.). - Upgrading of existing contests and celebrations in bicycling / trekking / fishing / hunting etc., furthermore development of culinary festivities to attain national and even international relevance. - Introduction of 'on demand' services available in areas close to big rivers (especially boats).
<p>Eligible area</p>
<p><i>General note:</i></p> <p>The whole programme area (Zone A) is eligible for the activities.</p> <p><i>Special notes:</i></p> <ul style="list-style-type: none"> - The development of themed 'capillary' cyclotourism routes and paths is supported primarily in Zone B. - Projects with works components to be implemented in Zone B will be favoured during the selection process.
<p>Indicative list of potential Lead Beneficiaries and Project Partners</p>
<ul style="list-style-type: none"> - Local governments and their institutions - Associations of local governments and their institutions - County governments and their institutions - Statal and semi-statal non-profit organisations with local office registered in the eligible programme area - Environmental and water authorities, national park management organisations - Regional or euro-regional development/management organisations - Management organisations of national parks and environmental protection areas

<ul style="list-style-type: none"> - Non-governmental non-profit organisations (NGO-s) - Civil organisations, foundations, associations - Development agencies (regional, local) - Tourist boards (county- and municipality level) - Trade organisations, economic and commercial chambers, labour centres - Non-profit enterprise promoting organisations - Non-profit organisations of national and local tourism enterprises
Project duration
Projects under this Action can have a project duration of maximum 20 months .
Minimum and maximum size of subsidy from Community funding
<ul style="list-style-type: none"> - Minimum and maximum Community funding to projects related to bicycle paths: 100.000,00 to 2.000.000,00 EUR - Minimum and maximum Community funding to all other projects under the Action: 100.000,00 to 1.000.000,00 EUR

4.3 Eligibility rules for Action 1.2.3

Action 1.2.3 – Development of thematic routes of cultural heritage
Content of projects
<p>Chapter 5 of the Programme Document lists the following possible activities under the present Action: <i>‘Support for networked projects in the field of heritage management, including common marketing, creation of thematic routes, as well as related (built and other) heritage reconstruction to ensure growth of tourist capacity in the border area. Minimum three settlements should be involved.’</i></p> <p>The wider objective of the Action is to develop and manage the common cultural heritage for promoting cultural values and traditions and for developing tourism. The Action will involve the establishment or strengthening of thematic routes which certain destinations of the region bundle into special itineraries (‘programmes’). Themed routes offer a practical option for the categorisation and display of the offer. The linking of individually less known attractions based on a common theme may emphasise the richness of the supply and may also give directions to tourists lacking information. Themed routes which contain adequate interpretation, additional</p>

services and products may assist to lengthen the period of time spent in the given region or may foster repeated visits to the area.

The thematic routes of cultural heritage in the Hungarian-Croatian border region may be based on:

- common historical, cultural, architectural, folklore-, ethnic and religious roots and traditions,
- famous persons (stages of their life),
- gastronomy and wine culture, and
- traditional handicrafts and local agricultural and food products.

The chosen theme can at the same time be the guiding motive of developments related to the stops along the route, for example this may help to define the content of events. However, in the case of settlements with a multi-faceted, complex offer it needs to be ensured that the theme does not overwhelm the attractions not belonging to the theme, nor their communication.

The attractiveness of thematic routes needs to be enhanced through the offer of services beyond those linked to the route's theme and by including resting points with attractive views, restaurants etc.

Under this Action only thematic routes with a tangible programme will be considered. Synergies with existing bicycle routes, hiking paths, wine routes, water-based tourism attractions and other potentially relevant tourism destinations and products are strongly encouraged.

Indicative list of eligible activities

Eligible activities with works components

The following works activities may be considered eligible, provided that they are closely related to the anticipated thematic route(s):

- Development of 'information points' in towns and attached to out-of-town cultural sites, to range from central visitor centres, over information booths at transportation hubs to touch-screen info-points. Setting up complex 'meeting points' where visitors can overview the whole offer of the thematic route.
- Constructing, equipping and operating of regional visitor centres at the 'entrance' to major wine-growing areas.
- Posting 'brown signs' of the thematic routes.
- Posting of direction signs for tourism attractions and services nearby (also to

tourism attractions which fall outside the 'programme' of the thematic route, accommodation, restaurants etc.).

- Posting interpretation boards with maps showing locations of attractive points and services along the thematic route and providing relevant information on the actual sequence of the route, explanations of significant local characteristics and sights.
- Creating new wine-related attractions such as wine museums, regional wine tasting centres and, even wine schools.
- Development of resting and viewing points along the thematic routes.
- Diversifying and improving the quality of available hostel capacities.
- Development of car parking areas close to 'information points' and visitor centres.
- Development of market places of local food products and handicraft, specialised shops with authentic products, tasting places.
- Establishing free Wi-Fi hotspots to facilitate the downloading of tourist information to notebooks and mobile devices.
- Creating a system of signposts for thematic routes, based on motives visually expressing the coherence of experience.
- Modernisation of museum collections and exhibitions connected to the thematic route, creating fun, interactive 'edutainment' experiences.

Eligible activities without works components

Activities include, but are not limited to, the following:

- Conceptual design and detailed planning of thematic routes.
- Developing and operating a restaurant rating system and/or a quality label to emphasise traditional cuisine and regional wines.
- Development of a variety of new creative events in the vineyards and on other types of thematic routes. In this field wine and other specific local products could be linked with art and culture, offering classical and jazz music, art exhibitions and performances. These events should support the positioning concepts of the wine-growing regions.
- Development of route maps and tourist guides / descriptions of the thematic routes.
- Development of promotional materials, brochures, leaflets, film presentations etc. about the thematic route.
- Development of websites and downloadable interactive maps for notebooks and mobile communication devices.

<ul style="list-style-type: none"> - Development and operation of a system of informative awareness-raising workshops for local stakeholders (e.g. museum staff, religious sites, shopkeepers etc.) on topics such as the relevance of tourism for the community, the needs and expectations of modern visitors, 'to do' items in servicing guests etc.
Eligible area
<p><i>General note:</i></p> <p>The destination(s) / thematic route(s) of minimum three settlements should be involved in a given project.</p> <p><i>Special note:</i></p> <p>Projects to be implemented in Zone B will be favoured during the selection process.</p>
Indicative list of potential Lead Beneficiaries and Project Partners
<ul style="list-style-type: none"> - Local governments and their institutions - Associations of local governments and their institutions - County governments and their institutions - Development agencies (regional, local) - Regional or euro-regional development/management organisations - Non-governmental non-profit organisations (NGO-s) - Civil organisations, foundations, associations - Universities and research institutes - Trade organisations, economic and commercial chambers, labour centres - Tourist boards (county- and municipality level) - Non-profit organisations of national and local tourism enterprises
Project duration
<p>Projects under this Action can have a project duration of maximum 16 months.</p>
Minimum and maximum size of subsidy from Community funding
<p>Minimum and maximum Community funding to all projects under the Action: 50.000,00 to 400.000,00 EUR.</p>

4.4 Eligibility rules for Action 1.2.4

Action 1.2.4 – Promotion of the river area as single touristic product
Content of projects
<p>The Programme Document foresees in its Chapter 5 the following content under this Action: <i>'Promotion of the river area as single touristic product, plus sectoral, thematic and micro-regional attractions. (Website, programmes, facilitation of networking between businesses in the tourism sector).'</i></p> <p>The wider objective of the Action is the promotion of the river area as single tourism product, including sectoral, thematic and micro-regional attractions. The success of tourism products depends significantly on their market presentation and on the communication with potential market segments.</p> <p>The Action involves the design and implementation of the corporate presentation of the areas or entities within the eligible area as selected by the Project Partners. All projects are expected to take into consideration the recommendations formulated in Chapter 3.5 of the present Handbook.</p>
Indicative list of eligible activities
Eligible activities with works components
There are no works components foreseen under this Action.
Eligible activities without works components
<p>Activities include, but are not limited to, the following:</p> <ul style="list-style-type: none"> - Development of an image booklet. - Development of positioning and branding concepts for major protected areas aimed at increasing their recognisability. - Harmonising of sub-regional and local brands. - Website development and operation. - Preparation of maps, brochures, promotional materials/objects. - Organising of events (festivals, performances, theatrical tours, concerts, exhibitions, art workshops, charity events, sports championships etc.). - Activities sustaining the identity and traditions of local communities. - Protection and promotion of cultural, art and ethnic values and traditions, particularly targeting minorities.

<ul style="list-style-type: none"> - Organising of conferences and workshops. - Communication- and media actions. - Development, conservation and protection of national culture and cultural heritage along the border through the support of cross-border co-operation between cultural and educational institutions (museums, theatres, other cultural institutions, schools etc.) - Establishing of networks among local media providers acting in public interest to advertise the programme area through its natural, historical, cultural and other features. - Organising study trips for international travel organisers and other international promoters e.g. travel journalist, in order to present the programme area. - Study tours for local stakeholders.
Eligible area
<p><i>General note:</i></p> <p>The whole programme area (Zone A) is eligible for the activities.</p>
Indicative list of potential Lead Beneficiaries and Project Partners
<ul style="list-style-type: none"> - Municipality local governments and their institutions - Associations of local governments and their institutions - County governments and their institutions - Development agencies (regional, local) - Statal and semi-statal non-profit organisations with local office registered in the eligible programme area - Non-governmental non-profit organisations (NGO-s) - Tourist boards (county- and municipality level) - Destination Management Organisations - Management organisations of national parks and environmental protection areas - Civil organisations, foundations, associations - Trade organisations, economic and commercial chambers, labour centres
Project duration
<p>Projects under this Action can have a project duration of maximum 16 months.</p>

Minimum and maximum size of subsidy from Community funding

Minimum and maximum Community funding to all projects under the Action:
50.000,00 to 200.000,00 EUR

4.5 Eligibility rules for Action 1.2.5

Action 1.2.5 – Private investment attraction

Content of projects

Chapter 5 of the Programme Document lists the following possible activities under the present Action: *'Promotion of private capital investment in the river border region, especially in hospitality, rentals etc.'*

The wider objective of the Action is to strengthen the local economy by increased revenue generation and creation of jobs through the promotion of private capital investments in the Hungarian-Croatian border region. In order to mobilise both local and external (note bene: foreign) investment capital, the Action targets two audience groups:

- Local enterprises active in the tourism area or planning to enter this market segment; and
- External (foreign and domestic) investors who could be attracted to the programme area to invest capital in the tourism sector.

Indicative list of eligible activities

Eligible activities with works components

There are no works components foreseen under this Action.


Eligible activities without works components

Activities include, but are not limited to, the following:

- Awareness-raising programmes for local private stakeholders.
- Training programmes in tourism entrepreneurship.
- Development of a monitoring database and needs assessment of the tourism enterprises of the border region.
- Development of quality management and assurance guides, procedures and

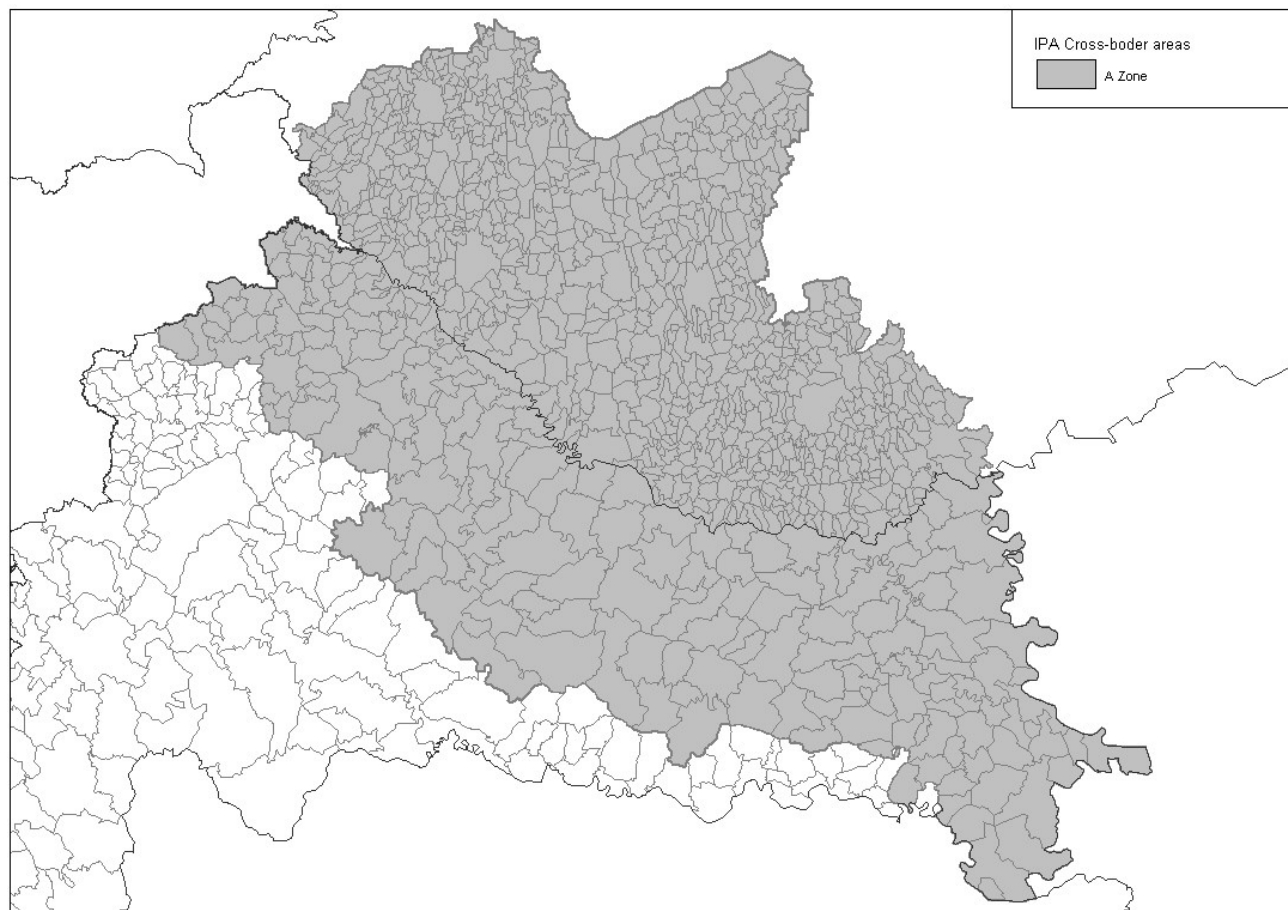
<p>certification systems for tourism enterprises.</p> <ul style="list-style-type: none"> - Promotional events for investors in the tourism sector in the border region. - Preparation of 'investment project presentation kits' outlining investment possibilities particularly in cruiser-docking and marina infrastructure, furthermore in health and wellness infrastructure and services. - Support to participation of investment promotion-, real estate- and other relevant fairs, exhibition or events.
Eligible area
<p><i>General note:</i></p> <p>Projects from the entire eligible programme area (Zone A) are encouraged under this Action.</p>
Indicative list of potential Lead Beneficiaries and Project Partners
<ul style="list-style-type: none"> - Non-governmental organisations (NGO-s) - Tourist boards (county- and municipality level) - Destination Management Organisations - Civil organisations, foundations, associations - Trade organisations, economic and commercial chambers, labour centres - Tourism associations - Development agencies (regional, local) - Local enterprise agencies - Economic and business development bodies - Non-profit training organisations - Labour centres
Project duration
<p>Projects under this Action can have a project duration of maximum 16 months.</p>
Minimum and maximum size of subsidy from Community funding
<p>Minimum and maximum Community funding to all projects under the Action: 50.000,00 to 200.000,00 EUR</p>

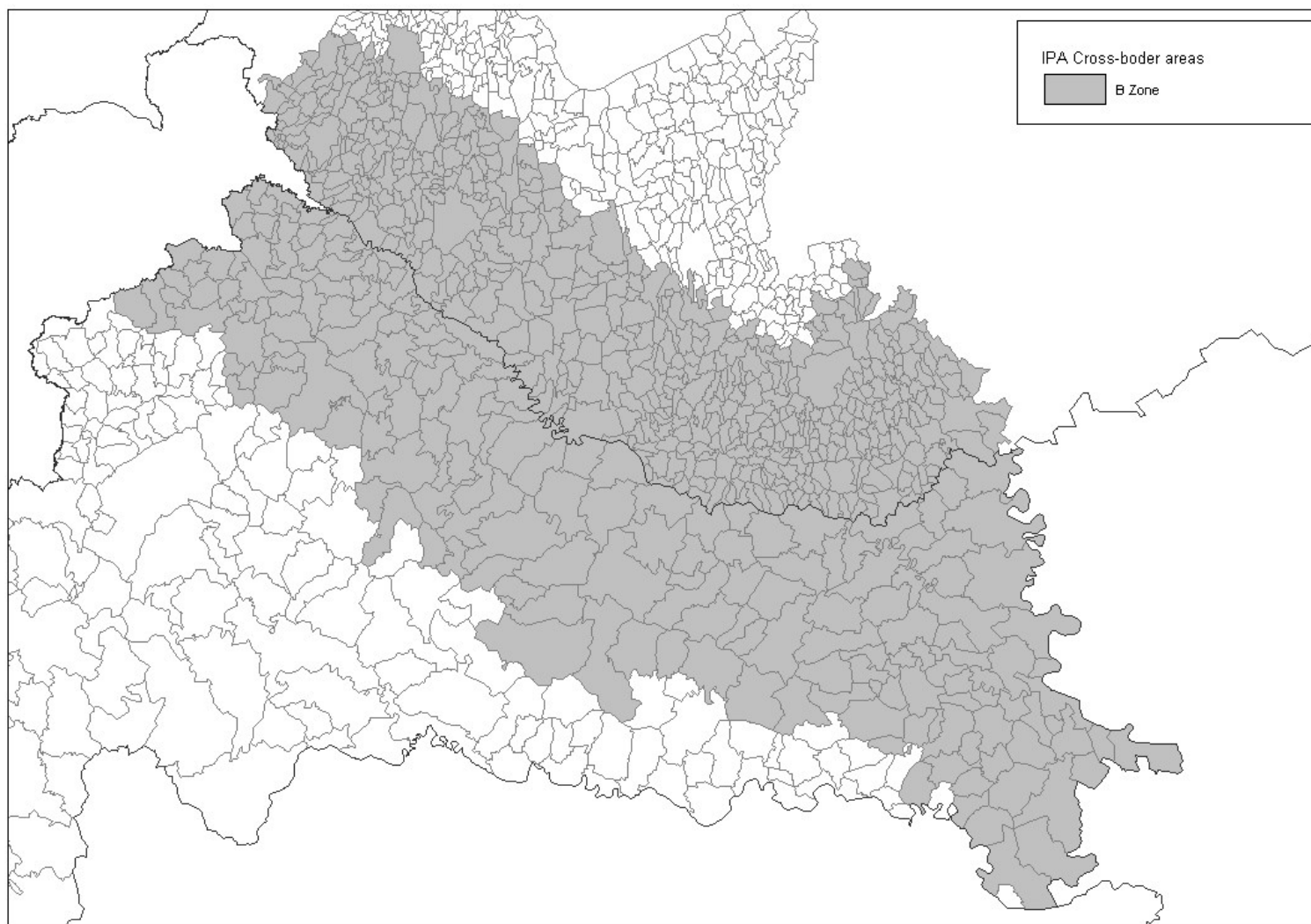
5. THE THIRD CALL FOR PROPOSALS

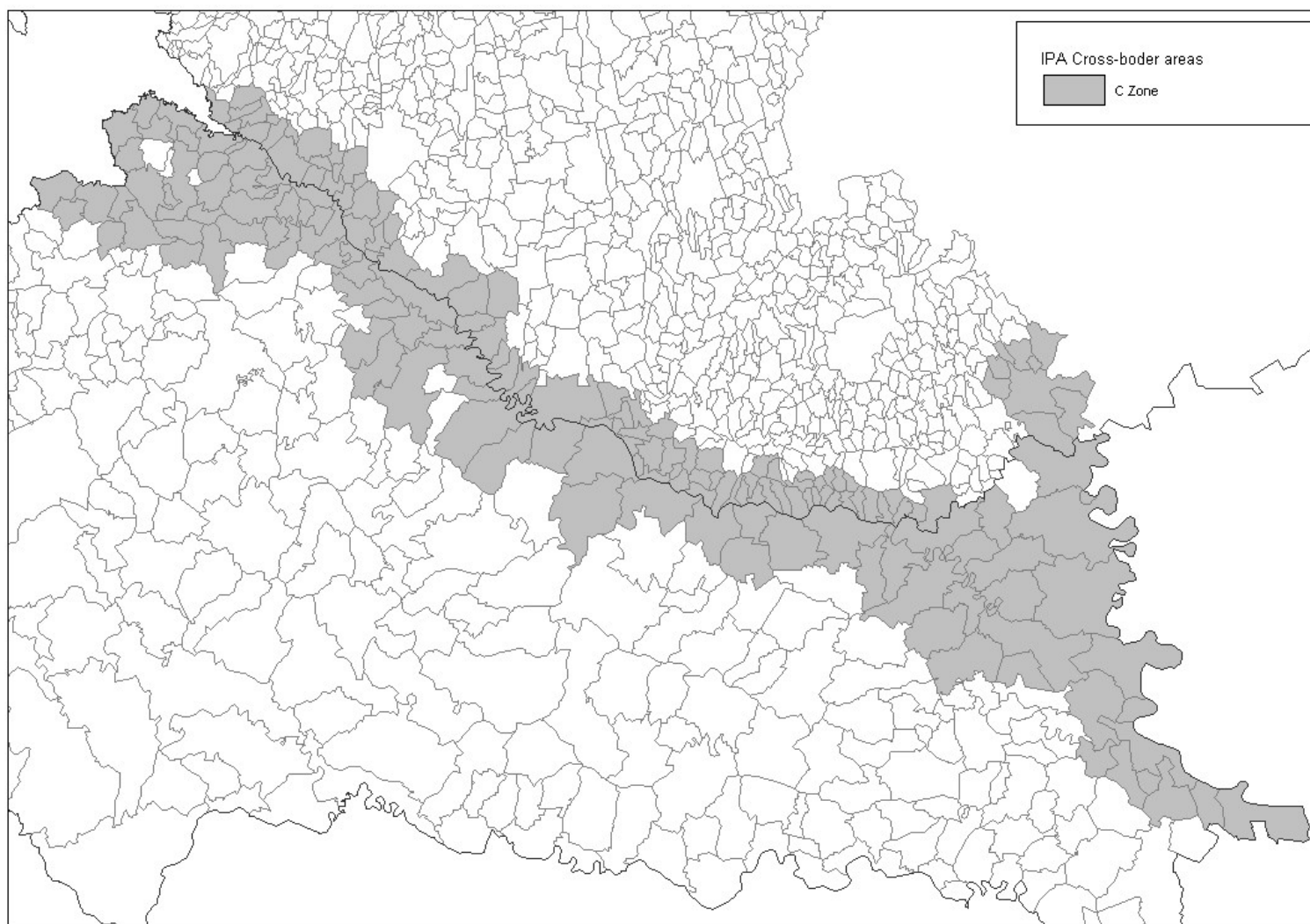
With reference to Chapter 1.2, this Handbook is designed to introduce you to the joint tourism development possibilities of the third CfP of the Programme, launched on  2011. **Please note that the contents of this document have been put into force through the publishing of the CfP** and all of its documents (among them, the GfA of the Call) on the official website of the Programme, www.hu-hr-ipa.com.

Important note: In line with Chapter 1.2, the content of this Handbook is to be interpreted bearing in mind the more general rules of the Guidelines. **Please carefully study the Guidelines for Applicants of the 3rd CfP for all detailed requirements as to the eligibility of organisations, of costs, regarding the submission of project proposals and concerning project implementation rules.**

Annex 1 – Zone maps







Annex 2 – List of local governments per Zone and sub-region

1) Zone A in Hungary and in Croatia

Please note that by definition **Zone A covers the entire eligible area of the cross-border Programme**. Therefore, if your local government is located in any of the four Hungarian and eight Croatian counties of the eligible area, your organisation and your activities will be eligible for the potential project content associated with Zone A in the documents of the CfP.

2) Zone B in Hungary

The following local governments belong to Zone B in Hungary. Please also note that Zone B has been divided into ten sub-regions as referred to in Chapter 1.3 (and as displayed in Annex 3) of this Handbook. Based on this, the following table contains the local governments of Zone B at the same time grouped according to the defined sub-regions.

Sub-region	Local governments of the sub-region located in Zone B
Baranyai Dráva-mente	Alsószentmárton, Bogdása, Cún, Drávacsehi, Drávacsepely, Drávafok, Drávaiványi, Drávakeresztúr, Dráwapalkonya, Dráwapiski, Drávaszabolcs, Drávaszerdahely, Drávasztára, Felsőszentmárton, Gordisa, Hirics, Kémes, Kemse, Kísszentmárton, Lúzsok, Markóc, Matty, Piskó, Sósvertike, Szaporca, Tésenfa, Vejti, Zaláta
Belső-Somogy	Bakháza, Beleg, Böhönye, Bolhás, Csákány, Csokonyavisonta, Görgeteg, Háromfa, Homokszentgyörgy, Iharos, Iharosberény, Inke, Istvándi, Jákó, Kálmánca, Kaszó, Kisbajom, Kiskorpád, Kőkút, Kutas, Lábod, Mike, Nagyatád, Nagyabajom, Nagykorpád, Nagyszakácsi, Nemesdéd, Nemeskísfalud, Nemesvid, Ötvöskőnyi, Pálmajor, Pogányszentpéter, Rinyabesenyő, Rinyaszentkirály, Rinyaújlak, Rinyaújnép, Segesd, Somogyaracs, Somogyicsicsó, Somogyszob, Somogyzsitfa, Szabás, Szentá, Szenyér, Szulok,

Sub-region	Local governments of the sub-region located in Zone B
	Tapsony, Tarany, Varászló, Vése
Dunamente (Mohács)	Babarc, Bár, Bezedek, Bóly, Borjád, Dunaszekcső, Erdősmárok, Feked, Geresdlak, Görcsönydoboka, Hásságy, Himesháza, Homorúd, Ivándárda, Kisnyárad, Kölked, Lánycsók, Lippó, Liptód, Majs, Maráza, Máriakéménd, Mohács, Monyoród, Nagynyárad, Olasz, Palotabozsok, Pócsa, Sárok, Sátorhely, Somberek, Szajk, Szebény, Szederkény, Székelyszabar, Szűr, Töttös, Udvar, Véménd, Versend
Muramente	Becsehely, Belezna, Csörnyeföld, Dobri, Fityeház, Kerkaszentkirály, Letenye, Lovászi, Molnári, Murakeresztúr, Murarátka, Muraszemenye, Petrivente, Rigyác, Semjénháza, Surd, Szentmargitfalva, Tormafölde, Tornyiszentmiklós, Tótszentmárton, Tótszerdahely
Nagykanizsa-Zalakaros	Balatonmagyaród, Csapi, Eszteregnye, Esztergályhorváti, Fűzvölgy, Galambok, Garabonc, Gelsesziget, Homokkomárom, Hosszúvölgy, Kistréce, Liszó, Magyarszentmiklós, Magyarszerdahely, Miháld, Nagybakónak, Nagykanizsa, Nagyrada, Nagyréce, Nemespátró, Pat, Sand, Sávoly, Somogysimonyi, Sormás, Szepetnek, Szőkedencs, Újudvar, Zalakaros, Zalakomár, Zalamerenye, Zalasárszeg, Zalasabbar, Zalaszentjakab, Zalaújlak, Zalavár
Pécs-Mecsek	Abaliget, Apátvarasd, Aranyosgadány, Bakonya, Berkesd, Bicsérd, Birján, Boda, Bogád, Bükkösd, Cserdi, Cserkút, Csonkamindszent, Egerág, Egyházaskozár, Ellend, Erdősmecske, Erzsébet, Fazekasboda, Gerde, Görcsöny, Gyód, Gyöngyfa, Hegyhátmaróc, Hetvehely, Hidas, Hosszúhetény, Kárász, Kátoly, Kékesd, Keszü, Királyegyháza, Kisvaszar, Komló, Kozármisleny, Kökény, Kővágószőlős, Kővágótöttös, Lothárd, Lovászhetény, Magyaregregy, Magyarsarlós, Magyarszék, Mánfa, Martonfa, Máza, Mecseknádasd, Mecsekpölöske, Nagykozár, Nagypall, Óbánya, Ófalu, Okorvölgy, Orfű, Pécs, Pécsbagota, Pécsudvard, Pécsvárad, Pellérd, Pereked, Pogány, Romonya, Sumony, Szabadszentkirály, Szárász, Szászvár, Szellő, Szemely, Szentkatalin, Szentlőrinc, Szilágy, Tófű, Vékény, Velény, Zengővárkony, Zók
Siklós-Villány	Adorjás, Áta, Babarcszölős, Baksa, Baranyahídvég, Belvárdgyula, Beremend, Besence, Bisse, Bogádmindszent, Bosta, Csányoszló, Csarnóta, Diósvizsló, Egyházasharaszti, Garé, Gilvánfa, Harkány, Hegyszentmárton, Illoska, Ipacsfa, Ivánbattyán, Kákics, Kásád, Kisasszonyfa, Kisbudmér, Kisdér, Kisharsány, Kisherend, Kisjakabfalva, Kiskassa, Kislippó, Kistapolca, Kistótfalu, Kórós, Kovácsida, Lapáncsa, Magyarbóly, Magyarmecske, Magyartelek, Márfa, Marócsa, Márok, Nagybudmér, Nagycsány, Nagyarsány, Nagytótfalu, Ócsárd, Okorág, Old, Ózdfalu, Palkonya, Páprád, Pécsdevecser, Peterd, Rádfalva, Regenye, Sámód, Sellye, Siklós, Siklósbadony, Siklósnagyfalu, Szalánta, Szava, Szilvás, Szőke, Szőkéd, Tengeri, Téseny, Túrony, Újpetre, Vajszló, Villány, Villánykövesd, Vokány
Somogyi Dráva-	Babócsa, Barcs, Bélavár, Berzence, Bolhó, Csurgó, Csurgónagymarton, Darány, Drávagárdony, Drávatamási, Gyékényes,

Sub-region	Local governments of the sub-region located in Zone B
mente	Heresznye, Kastélyosdombó, Komlósd, Lakócsa, Őrtilos, Péterhida, Porrog, Porrogszentkirály, Porrogszentpál, Potony, Somogybükkösd, Somogyudvarhely, Szentborbás, Tótújfalu, Vízvár, Zákány, Zákányfalu
Zalai dombvidék	Alsórajk, Alsószerterzsébet, Babosdöbréte, Baglad, Bak, Baktüttös, Bánokszertergyörgy, Barlahida, Bázakerettye, Becsvölgye, Belsőárd, Bocföldre, Bocska, Borsfa, Böde, Bödeháza, Börzönce, Bucsuta, Csatár, Csertalakos, Csesztreg, Csöde, Csonkahegyhát, Csömödér, Dióskál, Dobronhegy, Egeraracs, Felsőrajk, Felsőszerterzsébet, Gáborjánháza, Gellénháza, Gelse, Gombosszeg, Gosztola, Gutorföldre, Hahót, Hernyék, Iborfia, Iklódbördöce, Kacorlak, Kálócfa, Kányavár, Keménfa, Kerecseny, Kerkabarabás, Kerkafalva, Kerkakutas, Kerkateskánd, Kilimán, Kiscsehi, Kistolmács, Kissziget, Kozmadombja, Kustánszeg, Külsőárd, Lasztonya, Lendvadedes, Lendvajakabfa, Lenti, Lickóvados, Lisperzentadorján, Magyarföld, Maróc, Márokföld, Mikekarácsonyfa, Milejszeg, Nagylengyel, Nemesnép, Nemesszentandrás, Németfalu, Nova, Oltárc, Ormándlak, Orosztany, Ortaháza, Pacsa, Páka, Pálfiszeg, Petrikeresztúr, Pórszombat, Pölöske, Pölöskefő, Pördeföldre, Pötréte, Pusztapáti, Pusztaderics, Pusztamagyaród, Pusztaszentlászló, Ramocsa, Rédics, Resznek, Salomvár, Sárhida, Söjtör, Szécsisziget, Szertergyörgyvölgy, Szerterkozmadombja, Szerterlászló, Szerterpéterföldre, Szerterjártóháza, Szertervágy, Tófej, Valkonya, Várköföldre, Zajk, Zalabaksa, Zalacséb, Zalaegerszeg, Zalaövö, Zalaszerterbalázs, Zalaszertermárton, Zalaszertermihály, Zalaszerterombatfa, Zalatárnok, Zebecke
Zselic-Szertervár	Almamellék, Almáskeresztúr, Bakóca, Bánfa, Bárdudvarnok, Basal, Boldogasszonyfa, Botykapeterd, Bőszénfa, Bürös, Csebény, Csertő, Csököly, Dencsháza, Dinnyeberki, Endrőc, Gálosfa, Gige, Gyöngyösmellék, Hedrehely, Helesfa, Hencse, Hobol, Horváthertelend, Ibafa, Kacsóta, Kadarkút, Katádfa, Kétújfalu, Kisasszond, Kisdobsza, Kistamási, Lad, Magyarlukafa, Merenye, Molvány, Mozsgó, Nagydobsza, Nagypeterd, Nagyváty, Nemeske, Nyugotszerterzsébet, Patapoklosi, Patca, Patosfa, Pettend, Rinyakovácsi, Rózsafa, Simonfa, Somogyapáti, Somogyhárságy, Somogyhatvan, Somogyviszló, Szenna, Szerterdénés, Szertergát, Szerterlászló, Szertervár, Szertervásszertermárton, Szerterény, Szerterlimán, Szerterlafalu, Szertertertergyörgy, Szerterad, Szerterárosbéc, Szerternye, Szerterdör, Szerterlickisfalud, Szerterlickislak

3) Zone B in Croatia

The following table contains the Croatian local governments of Zone B, also grouped according to the defined sub-regions. Please note that on the Croatian side of the eligible programme area, the counties play the role of the sub-regions.

Sub-region (County)	Local governments of the sub-region located in Zone B
Bjelovarsko-bilogorska County	Bjelovar, Daruvar, Đulovac, Grubišno Polje, Hercegovac, Ivanska, Kapela, Končanica, Nova Rača, Rovišće, Šandrovac, Severin, Sirač, Štefanje, Velika Pisanica, Velika Trnovitica, Veliki Grđevac, Veliko Trojstvo, Zrinski Topolovac
Koprivničko-križevačka County	Drnje, Đelekovec, Đurdevac, Ferdinandovac, Gola, Gornja Rijeka, Hlebine, Kalinovac, Kalnik, Kloštar Podravski, Koprivnica, Koprivnički Bregi, Koprivnički Ivanec, Križevci, Legrad, Molve, Novigrad Podravski, Novo Virje, Peteranec, Podravske Sesvete, Rasinja, Sokolovac, Sveti Ivan Žabno, Sveti Petar Orehovec, Virje
Međimurska County	Belica, Čakovec, Dekanovec, Domašinec, Donja Dubrava, Donji Kraljevec, Donji Vidovec, Goričan, Gornji Mihaljevec, Kotoriba, Mala Subotica, Mursko Središće, Nedelišće, Orehovica, Podturen, Prelog, Pribislavec, Selnica, Šenkovec, Strahoninec, Štrigova, Sveta Marija, Sveti Juraj na Bregu, Sveti Martin na Muri, Vratušinec
Osječko-baranjska County	Antunovac, Beli Manastir, Belišće, Bilje, Bizovac, Čeminac, Čepin, Darda, Donja Motičina, Donji Mihaljac, Draž, Drenje, Đakovo, Đurđenovac, Erdut, Ernestinovo, Feričanci, Gorjani, Jagodnjak, Kneževi Vinogradi, Koška, Levanjska Varoš, Magadenovac, Marijanci, Našice, Osijek, Petlovac, Petrijevci, Podgorac, Podravska Moslavina, Popovac, Punitovci, Satnica Đakovačka, Semeljci, Šodolovci, Strizivojna, Valpovo, Viljevo, Viškovci, Vladislavci, Vuka
Požeško-slavonska County	Brestovac, Čaglin, Kaptol, Kutjevo, Pakrac, Velika
Varaždinska County	Bednja, Beretince, Breznica, Breznički Hum, Cestica, Donja Voća, Gornji Kneginec, Ivanec, Jalžabet, Klenovnik, Lepoglava, Ljubeščica, Ludbreg, Mali Bukovec, Martijanec, Maruševac, Novi Marof, Petrijanec, Sračinec, Sveti Đurđ, Sveti Ilija, Trnovec Bartolovečki, Varaždin, Varaždinske Toplice, Veliki Bukovec, Vidovec, Vinica, Visoko
Virovitičko-podravska County	Crnac, Čačinci, Čađavica, Gradina, Lukač, Mikleuš, Nova Bukovica, Orahovica, Pitomača, Slatina, Sopje, Suhopolje, Špišić Bukovica, Virovitica, Voćin, Zdenci
Vukovarsko-srijemska County	Andrijaševci, Babina Greda, Bogdanovci, Borovo, Bošnjaci, Cerna, Drenovci, Gradište, Ilok, Ivankovo, Jarmina, Lovas, Markušica, Negoslavci, Nijemci, Nuštar, Otok, Privlaka, Stari Jankovci, Stari Mikanovci, Tompojevci, Tordinci, Tovarnik, Trpinja, Vinkovci, Vodinci, Vrbanja, Vukovar, Županja

4) Zone C in Hungary

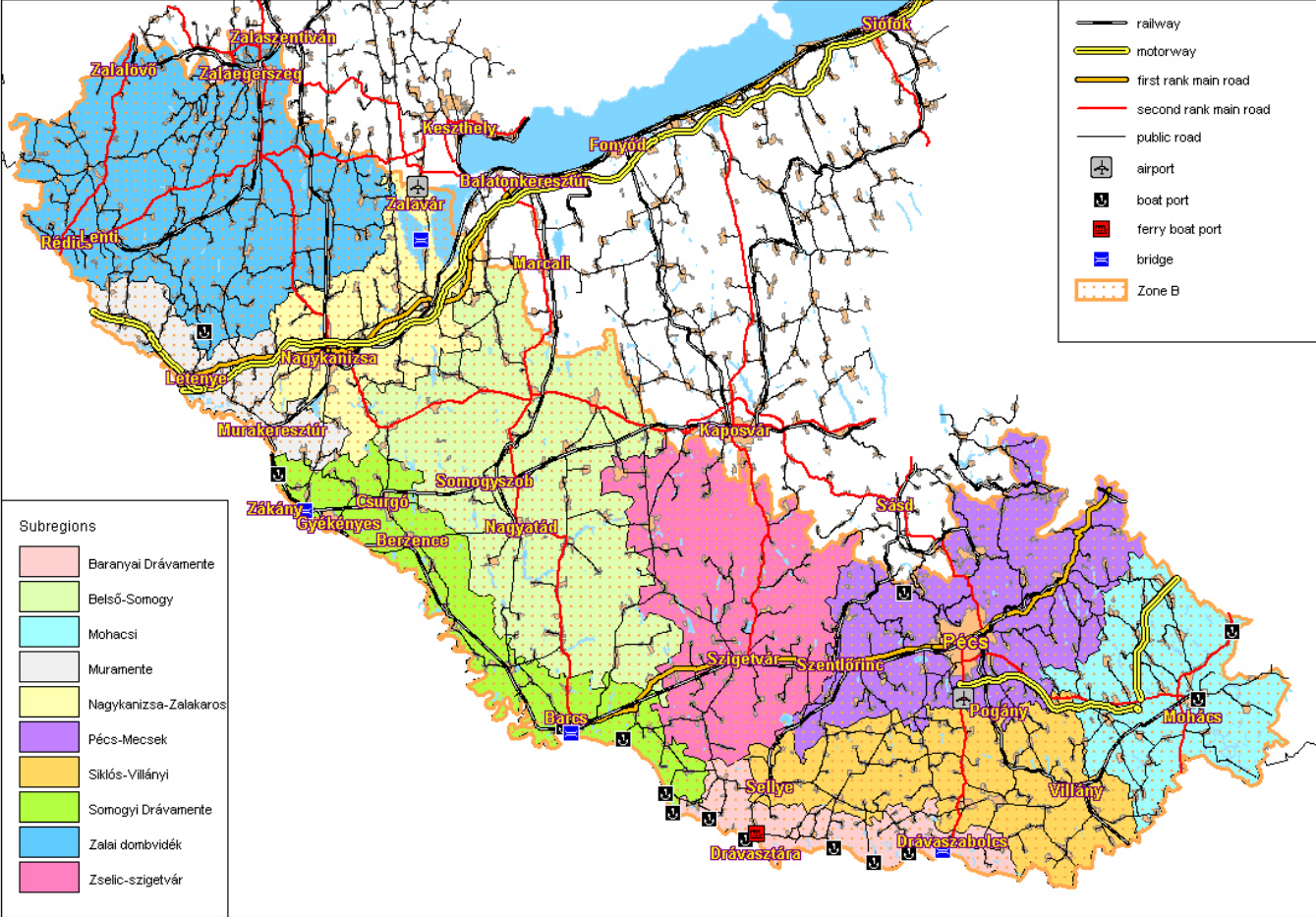
Please note that due to the limited geographical scope of Zone C, **there are sub-regions on the Hungarian side which do not contain local governments that would also be part of this zone.**

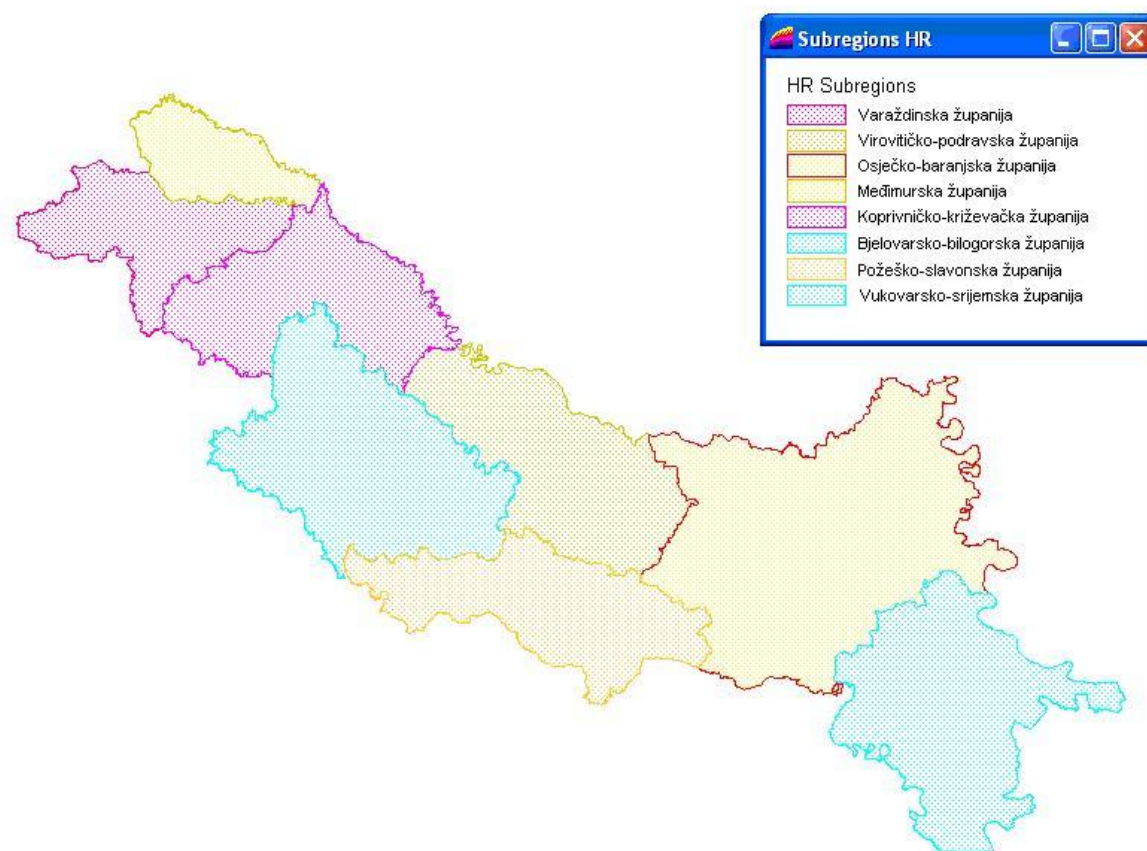
Sub-region	Local governments of the sub-region located in Zone C
Baranyai Dráva-mente	Alsószentmárton, Bogdása, Cún, Drávacsehi, Drávacsepely, Drávafok, Drávaiványi, Drávakeresztúr, Dráwapalkonya, Dráwapiski, Drávaszabolcs, Drávaszerdahely, Drávasztára, Felsőszentmárton, Gordisa, Hirics, Kémes, Kemse, Kísszentmárton, Lúzsok, Markóc, Matty, Piskó, Sósvertike, Szaporca, Tésenfa, Vejti, Zaláta
Belső-Somogy	n.a.
Dunamente (Mohács)	Bár, Dunaszekcső, Görcsönydoboka, Homorúd, Kölked, Lánycsók, Mohács, Somberek, Székelyszabar
Muramente	Becsehely, Belezna, Csörnyeföld, Dobri, Fityeház, Kerkaszentkirály, Letenye, Molnári, Murakeresztúr, Murarátká, Muraszemenye, Petrivente, Semjénháza, Surd, Szentmargitfalva, Tormafölde, Tornyiszentmiklós, Tótszentmárton, Tótszerdahely
Nagykanizsa-Zalakaros	Szepetnek
Pécs-Mecsek	n. a.
Siklós-Villány	Baranyahídvég, Beremend, Egyházasharaszti, Ipacsfa, Kásád, Kovácshida, Old, Sellye, Vajsló
Somogyi Dráva-mente	Babócsa, Barcs, Bélavár, Bolhó, Darány, Drávagárdony, Drávatamási, Gyékényes, Heresznye, Kastélyosdombó, Lakócsa, Őrtilos, Péterhida, Potony, Somogybükkösd, Somogyudvarhely, Szentborbás, Tótújfalu, Vízvár, Zákány, Zákányfalu
Zalai dombvidék	Zajk
Zselic-Szigetvár	Zádor

5) Zone C in Croatia

The same note as provided above the previous table holds true for the Croatian side of Zone C. **Please note that in case of the local governments indicated in *Italic* below, only some settlements are included in Zone C.** Project activities in these local governments can only be regarded as implemented in Zone C if they are carried out in parts of the given local government which have a maximum distance of 5 km from the Mura / Drava / Danube rivers.

Sub-region (County)	Local governments of the sub-region located in Zone C
Bjelovarsko-bilogorska County	n. a.
Koprivničko-križevačka County	Drnje, Đelekovec, <i>Đurdevac</i> , Ferdinandovac, Gola, Hlebina, <i>Kloštar Podravski</i> , Legrad, Molve, <i>Novigrad Podravski</i> , Novo Virje, Peteranec, Podravske Sesvete, <i>Rasinja</i> , <i>Virje</i>
Međimurska County	Belica, Čakovec, Dekanovec, Domašinec, Donja Dubrava, Donji Kraljevec, Donji Vidovec, Goričan, <i>Gornji Mihaljevec</i> , Kotoriba, Mala Subotica, Mursko Središće, Nedelišće, Orehovica, Podturen, Prelog, Selnica, Strahoninec, Štrigova, Sveta Marija, Sveti Martin na Muri, Vratišinec
Osječko-baranjska County	Antunovac, Belišće, Bilje, Bizovac, <i>Čeminac</i> , Čepin, Darda, Donji Miholjac, Draž, Erdut, Jagodnjak, <i>Kneževi Vinogradi</i> , Marijanci, Osijek, Petlovac, Petrijevci, Podravska Moslavina, Valpovo, Viljevo
Požeško-slavonska County	n. a.
Varaždinska County	Gornji Knežinec, Jalžabet, Ludbreg, Mali Bukovec, Martijanec, Petrijanec, Sračinec, Sveti Đurđ, Trnovec Bartolovečki, Varaždin, Veliki Bukovec, <i>Vidovec</i>
Virovitičko-podravska County	<i>Crnac</i> , <i>Čađavica</i> , <i>Gradina</i> , <i>Lukač</i> , <i>Pitomača</i> , <i>Sopje</i> , <i>Suhopolje</i> , <i>Špišić Bukovica</i>
Vukovarsko-srijemska County	Bogdanovci, Borovo, Ilok, Lovas, Negoslavci, <i>Nuštar</i> , Tompojevci, Trpinja, Vukovar





Annex 4 – Sub-regional product matrix

Hungary:

Tourism Products	Baranyai Dráva- mente	Belső- Somogy	Duna- mente (Mohács)	Mura- mente	Nagy- kanizsa- Zalakaros	Pécs- Mecsek	Siklós- Villány	Somogyi Dráva- mente	Zalai dombvidék	Zselic- Szigetvár
<i>Rural tourism</i>										
<i>Bicycling</i>										
<i>Water based tourism</i>										
<i>Trekking and hiking</i>										
<i>Equestrian tourism</i>										
<i>Fishing</i>										
<i>Hunting</i>										
<i>Bird watching</i>										
<i>Ecotourism</i>										
<i>Culture tourism</i>										
<i>Health and wellness</i>										
<i>Wine tourism</i>										
<i>River cruising</i>										
<i>Business tourism</i>										

Primary (characterising) products

Secondary (complementary) products

Croatia:

Tourism Products	Međimurska County	Varaždinska County	Koprivničko-križevačka County	Bjelovarsko-Bilogorska County*	Virovitičko-podravska County	Požeško-slavonska County*	Osječko-baranjska County	Vukovarsko-srijemska County*
<i>Rural tourism</i>								
<i>Bicycling</i>								
<i>Water based tourism</i>								
<i>Trekking and hiking</i>								
<i>Equestrian tourism</i>								
<i>Fishing</i>								
<i>Hunting</i>								
<i>Bird/animal watching</i>								
<i>Ecotourism</i>								
<i>Culture tourism</i>								
<i>Health and wellness</i>								
<i>Wine tourism</i>								
<i>River cruising</i>								
<i>Business tourism</i>								

* Counties only partially included in Zone B of the programme area

Primary (characterising) products
Secondary (complementary) products

Annex 5 – Tourism product portfolio

Tourism products	Generating markets	Product modality	Market potential	Zones
Rural tourism	- regional, national, international (neighbouring)	- one-day visit - multi-day stay	- high - medium	ABC
Nature based products				
Bicycling	- regional, national, international (neighbouring), international (Europe)	- one-day visit / trip - tours	- high - medium	BC
Water-based tourism	- regional, national	- one-day visit - multi-day stay	- medium - niche	C
Trekking and hiking	- regional, national, international (neighbouring)	- one-day visit - multi-day stay	- high - high	BC
Equestrian tourism	- regional, national	- one-day visit - tours	- niche - niche	BC
Fishing	- local, regional, national	- one-day visit - multi-day stay	- high - medium	BC
Hunting	- local, regional, national, international (neighbouring)	- one-day visit - multi-day stay	- medium - niche	BC
Ecotourism	- local, regional, national,	- one-day visit	- medium	BC

Tourism products	Generating markets	Product modality	Market potential	Zones
	international (neighbouring)	- multi-day stay - tours	- niche - niche	
Bird/animal watching	- national, international (neighbouring), international (Europe)	- one-day visit - multi-day stay - tours	- niche - niche - niche	BC
Culture based products				
Cultural tourism	- regional, national, international (neighbouring), international (Europe)	- one-day visit - multi-day stay - tours	- high - medium - medium	ABC
Other products				
Health and wellness	- local, regional, national, international (neighbouring), international (Europe)	- one-day visit - multi-day stay	- high - high	BC
Wine tourism	- local, regional, national, international (neighbouring), international (Europe)	- one-day visit - tours	- high - high	(A)BC
River cruising	- international (neighbouring), international (Europe)	- tours	- niche	C
Business tourism	- regional, national, international (neighbouring)	- one-day visit - multi-day stay	- medium - medium	BC

Annex 6 – Segments ranking

Segments	Rate*
Empty nesters, holiday	15,78
Full nesters, holiday	13,18
Full nesters, other (VFR, shopping, studying etc.)	13,11
Empty nesters, other (VFR, shopping, studying etc.)	8,97
Independent traveller, holiday	6,82
Retired, other (VFR, shopping, studying etc.)	5,42
Retired, holiday	4,69
Student, holiday	4,66
Independent traveller, other (VFR, shopping, studying etc.)	3,02
Full nesters, business	2,86
Empty nesters, sport	2,79
Empty nesters, health	2,79
Full nesters, culture	2,36
Full nesters, sport	2,33
Student, other	1,89
Full nesters, health	1,64
Young independent traveller, sport	1,20
Retired, health	1,09
Empty nesters, culture	0,94
Retired, sport	0,83
Student, culture	0,42
Young independent, culture	0,39

Segments	Rate*
Full nesters, nature	0,37
Independent traveller, health	0,26
Empty nesters, nature	0,25
Empty nesters, business	0,24
Student, health	0,22
Retired, business	0,21
Retired, culture	0,20
Retired, nature	0,15
Young independent traveller, business	0,09
Young independent traveller, nature	0,03
Students, nature	0,02

*Rate = segment weight in the product type × product weight in the total demand.

The outlined product categories are described below:

These segments have the highest rate so in the short run the marketing activity should be based on them.
These are important segments, however, the share of these segments could be increased.
These markets have moderate importance, but could be potential ones by specific marketing campaigns.
Presently these are not very important segments.