



## **\ Report 1.1.**

***“Diagnosis of Culture, Tourism and People-to-people  
contact fields in EUSDR countries and regions”***

**May 2022**



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## Introduction and general context

### Main objectives of the current report:

- identification of problems and intervention priorities in the two sectors based on the analysis of statistical indicators, from an economic perspective, of infrastructure, employment, difficulties encountered during the pandemic and post-pandemic recovery opportunities;
- developing analyses at territorial level so that problems and priorities in the two sectors can be located (mapped) at EUSDR Member State level;
- correlating the problems and priorities identified with the actions and priorities in the Action Plan approved by the European Commission, allowing them to be located (mapped);
- correlating the problems and priorities identified with those concerning the territorial development of the different categories of territories at European level;
- highlighting the dynamics of the PA3 domains during the pandemic, globally and at the territorial level.

The area covered by the EUSDR is mainly the basin of the 2.857 km long Danube River, including also the parts of the mountain ranges where its tributaries originate (like the Alps, or the Carpathians). It stretches from the Black Forest (Germany) to the Black Sea (Romania-Moldova-Ukraine) and is home to around 115 million inhabitants. Involving 14 countries, it is the largest and most diverse macro-regional strategy: nine EU Member States (Austria, Bulgaria, Croatia, Czech Republic, parts of Germany, Hungary, Romania, Slovakia, Slovenia), three Accession Countries (Bosnia and Herzegovina, Montenegro, Serbia) and two Neighbouring Countries (Moldova, parts of Ukraine).

### Overview of tourism in the EU - general facts:

- In 2019, the EU-28 tourism industry employed 22.6 million people (11.2% of EU employment) and accounted for 9.5% of EU GDP.
- Also in 2019, travel and tourism (T&T) grew by 2.3%, while overall GDP growth was only 1.4% (WTTC & Oxford Economics, 2020).
- Tourism in the EU involves around 3 million enterprises, the vast majority of which are SMEs.
- Tourism is the 4<sup>th</sup> largest EU export category and brings spill-over benefits to the European economy as a whole: EUR 1 of value added generated by tourism results in an additional EUR 0.56 of value added from other industries. (European Commission, 2020, p.7).
- In general, domestic tourism in 2019 accounted for 65% of tourism expenditure on average in the EU, and 'inbound expenditure' by visitors from other countries for 35%. (Eurostat, 2019)

Today, the role of tourism as an economic sector demands additional requirements in terms of environmental protection and sustainable use of resources, either material or immaterial, in line with the UN New Urban Agenda, the 17 Sustainable Development Goals (SDGs), the 'New European Agenda for Culture' (CE, 2018) and the European Green Deal.

In this context, touristic activities are increasingly linked to the cultural dimension: *“Cultural tourism is a type of tourism activity in which the visitor’s essential motivation is to learn, discover,*



*experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions.” (UNWTO, 2017, p.14).*

According to the World Tourism Organisation, economic activities associated with tourism include (UNWTO, 2010, p. 42):

- Accommodation for visitors;
- Food and beverage serving activities;
- Local/International passenger transport: Railway, Road, Water and Air passenger transport, as well as Transport rental;
- Travel agencies, reservation services, tourist operators;
- Cultural activities;
- Sports and recreation;
- Retail trade of country-specific tourism goods.

The most relevant economic sectors are **accommodation, transport and provision of food and beverages in restaurants, bars and cafes**. However, experts underline that more than a third of tourism value added for a domestic economy comes from indirect impacts. This reflects the breadth and depth of links between tourism and other sectors such as retail, construction, entertainment and professional services (OECD, 2020a, p. 22).

From a methodological perspective, the current report draws on quantitative data related to the business and entrepreneurial activity at NUTS2 and NUTS3 level (where available), as well as on indicators related to touristic performance and circulation at NUTS2 level. Most data are retrieved from Eurostat, with notable exceptions for non-EU countries. In their case, data has been harmonized based on national statistical offices and in most cases, it is available only at NUTS0 level. Differences regarding the method of data collection and aggregation might arise between Eurostat and national level data, which is a limitation of the analysis. Lack of available data from Ukraine also adds additional limitations to the analysis, despite performing interrogation of the databases with local experts.

Additional maps, as well as qualitative data, have been included based on literature review.

# The contribution of the Culture and Tourism sector to the national and regional economies

## Culture and Tourism sectors in regional economies

The tourism sector is extremely dynamic and constantly adapting to new demands, changing contexts and emerging offers in other sectors. Thus, regions where tourism is important for the local economy can be differentiated by the origins of tourists. At the same time, tourism is reflected into the regional economies through the level of economic activity it generates, such as entrepreneurship opportunities (for local families as well as for large companies), employment, wages and multiplication effects in other sectors, too.

To highlight the contribution of tourism to regional economies, an analysis of local active units and entrepreneurship in selected sectors has been performed. According to Santos et al. (2020, p. 34), data related to economic activity in the accommodation industry and in the food and beverages services can act as a reliable proxy to understand the disparities in terms of tourism-related employment and dynamics, while Eurostat suggests a broader list of economic sectors which capture both direct and indirect activities related to tourism. These sectors can be found in Table 1 below:

**TABLE 1 NACE ACTIVITIES RELATED TO TOURISM**

NACE Sector name	Tourism-related
Land transport and transport via pipelines	Partially
Water transport	Partially
Air transport	Mainly
Accommodation	Mainly
Food and beverage service activities	Partially
Rental and leasing activities	Partially
Travel agency, tour operator and other reservation service and related activities	Mainly

Source: Own adaptation based on data availability based on "Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021"

## The business environment in the field of Culture and Tourism

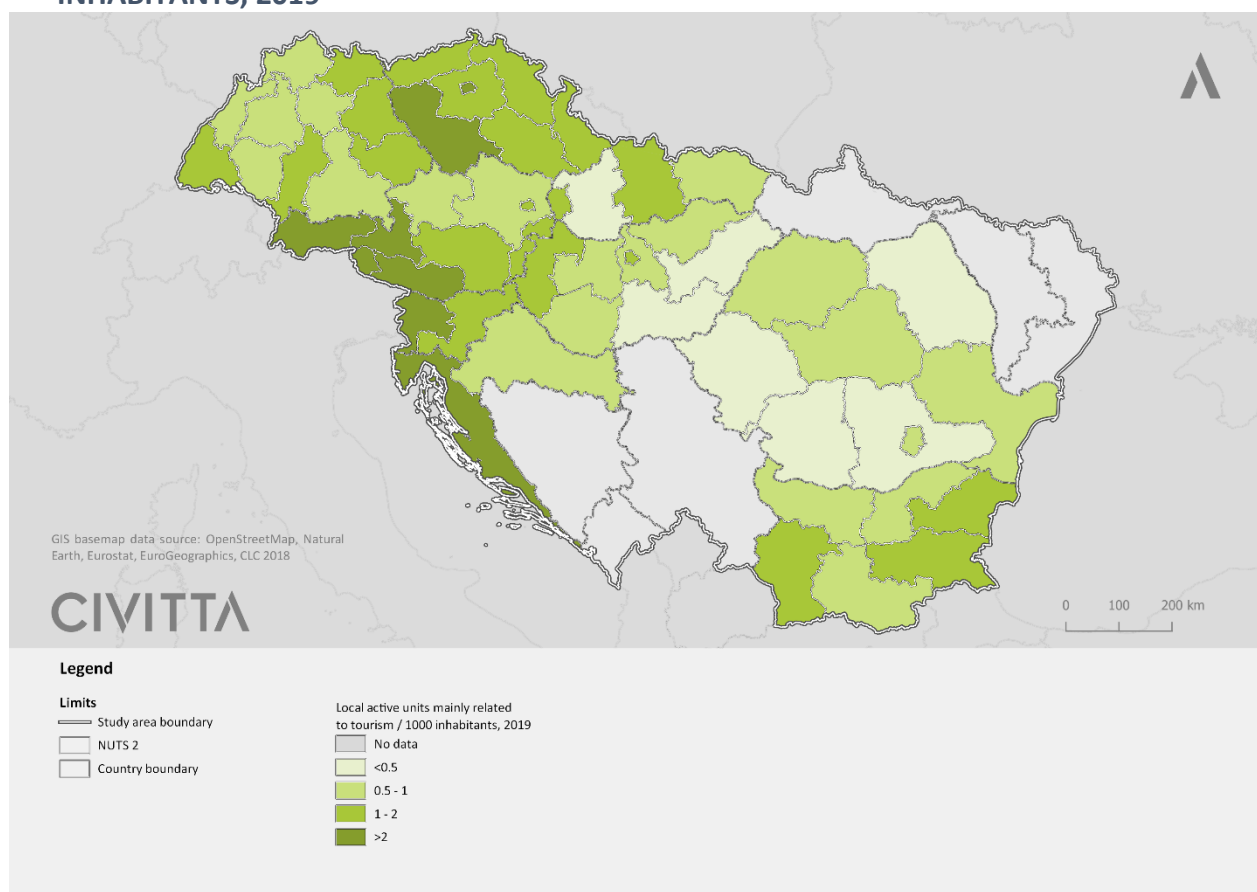
Part of the contribution of tourism to local and regional economies is reflected into the entrepreneurial activity, namely measured through the density of local active units, in sectors that are directly linked to tourism, as highlighted in Table 1 and Figure 1 above. As such, **the EUSDR territory displays a quite large variation in terms of economic activity directly related to tourism.** The spatial distribution of local active units in tourism correlates to a good extent to two other territorial features:

- (1) The overall economic activity of the area - meaning that a high density of enterprises in all sectors is highly correlated with a high density of enterprises in tourism as well. **This is mostly the case for capital city regions and the western part of the EUSDR territory.**



- (2) The high endowment with touristic and cultural assets - meaning that the exploitation of touristic resources generates economic activity, further driving entrepreneurial activity and higher business growth. This is mostly the case with the **Dalmatian coast and Alpine Austrian regions (e.g. Tirol, Salzburg)**, and moderately, in the **Bulgarian coast and other areas in Slovenia, Slovakia and the Czech Republic**.

**FIGURE 1 DENSITY OF LOCAL ACTIVE UNITS MAINLY RELATED TO TOURISM, NO. OF UNITS / 1000 INHABITANTS, 2019**

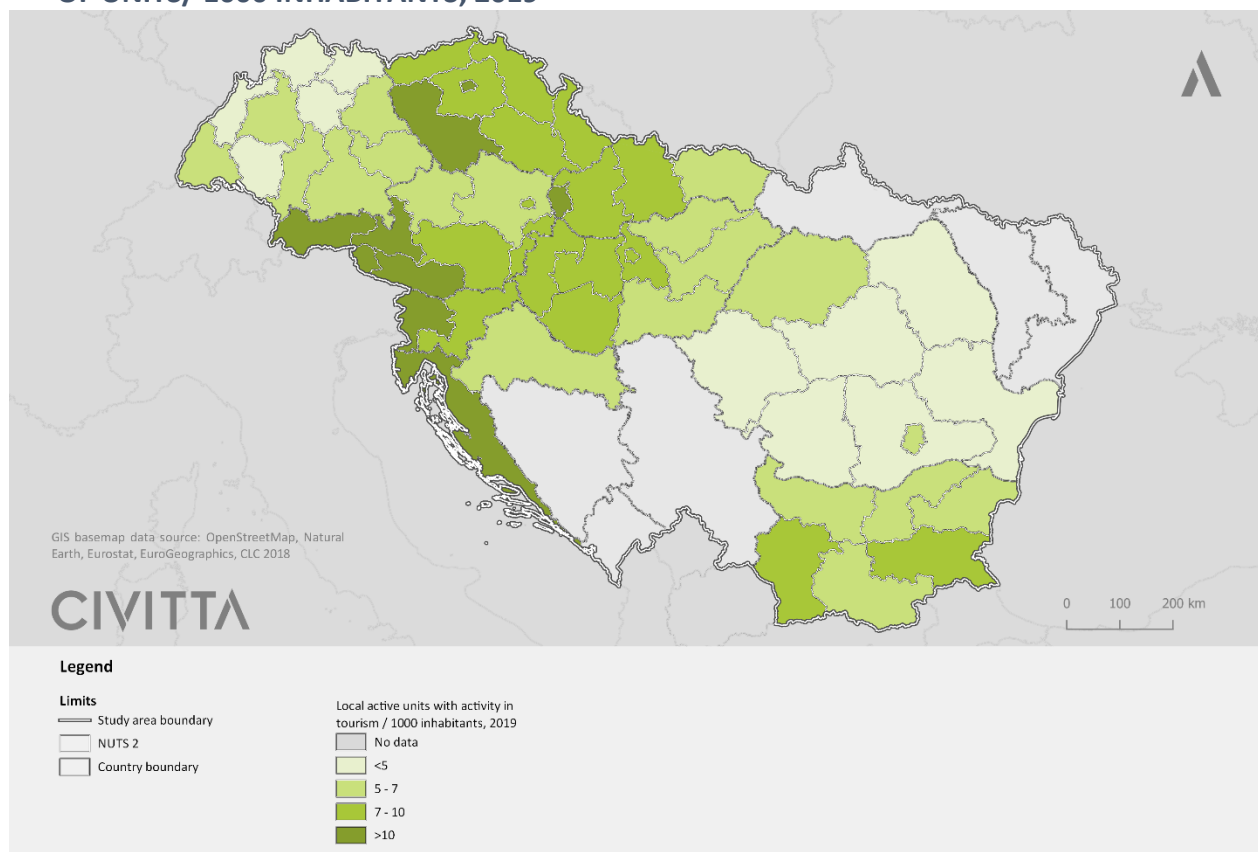


Source: Own calculation based on Eurostat data

In territories with a lower density of economic activity directly related to tourism potential challenges might be related to low touristic demand or low entrepreneurial capacity in general (e.g. in North-East region of Romania). In turn, despite the rich cultural and natural endowment of the territory, accessibility is a major issue, hindering the movement of tourists, but also the overall attractiveness of the areas, diminishing the entrepreneurial capacity.

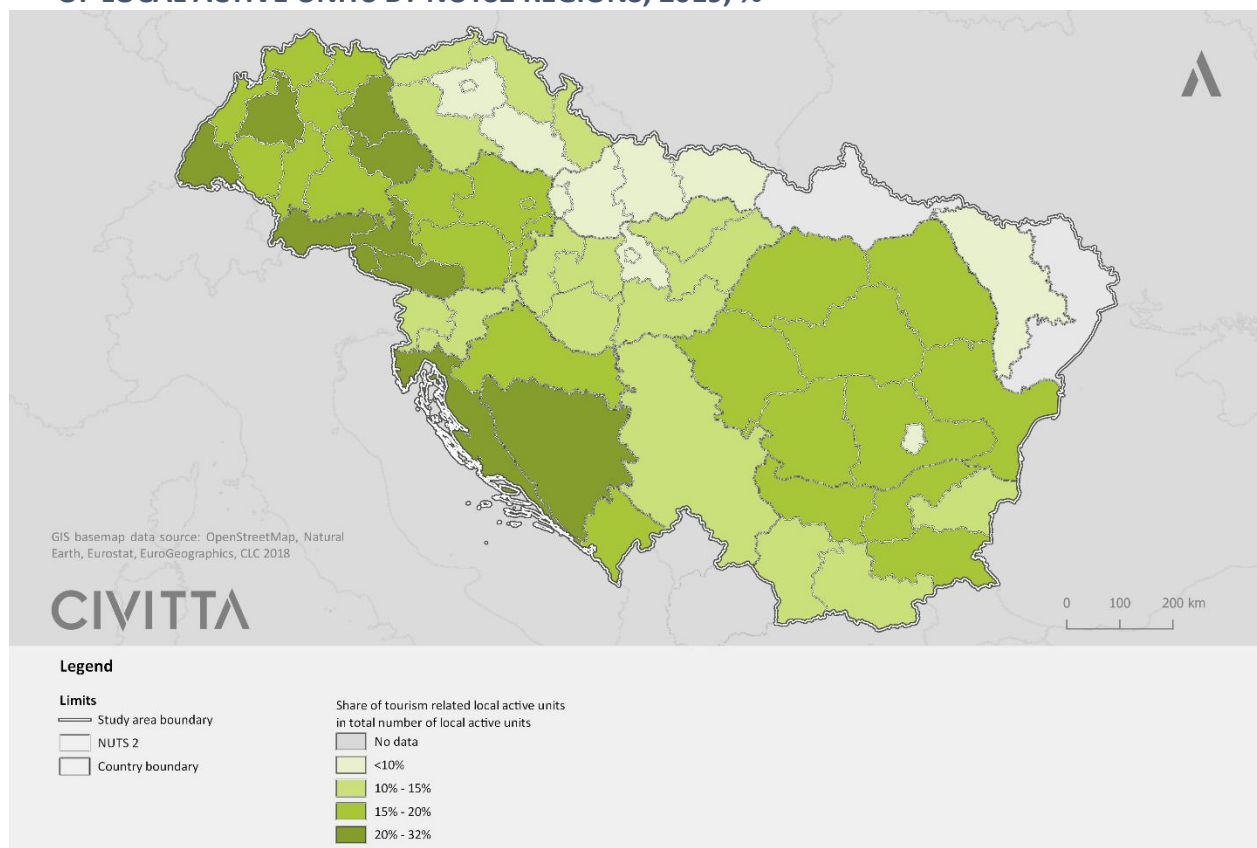
A similar pattern is observed when adding other economic activities partially related to tourism, such as land transport, food and beverages services or rental and leasing activities. **The main lesson arising from this point is that entrepreneurial activity is rather a consequence of other territorial factors** - of which accessibility to touristic and cultural sites and the quality of the touristic resources rank highest in terms of increasing the attractiveness of the destination, ultimately incentivizing more entrepreneurs to seize opportunities in the tourism-related sectors.

**FIGURE 2 DENSITY OF LOCAL ACTIVE UNITS MAINLY AND PARTIALLY RELATED TO TOURISM, NO. OF UNITS/ 1000 INHABITANTS, 2019**



Source: Own calculation based on Eurostat data

**FIGURE 3 SHARE OF MAINLY TOURISM-RELATED LOCAL ACTIVE UNITS IN THE TOTAL NUMBER OF LOCAL ACTIVE UNITS BY NUTS2 REGIONS, 2019, %**

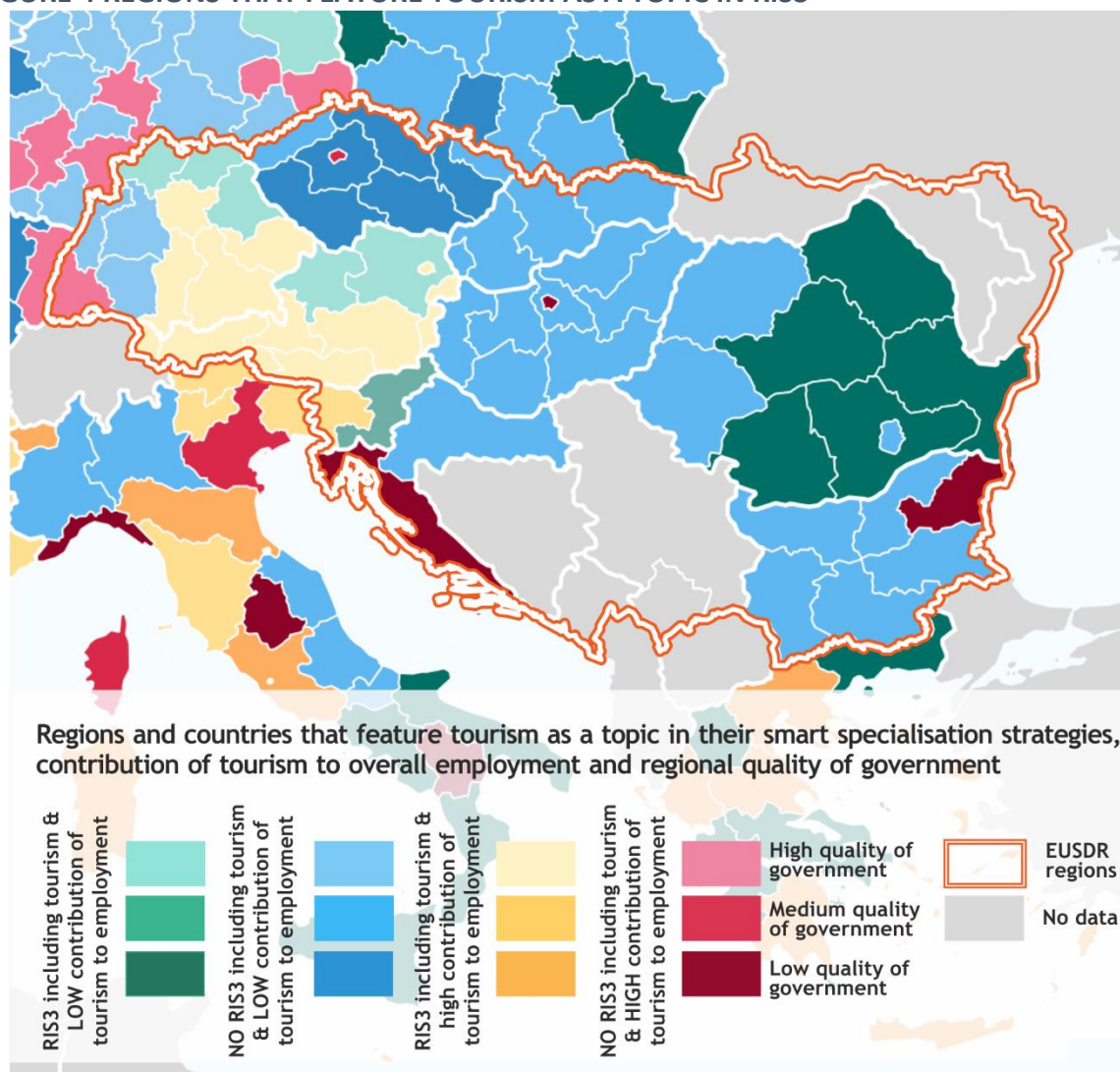


Source: Own calculation based on Eurostat data

**Figure 3 above shows that some regions within the EUSDR territory have a higher dependency on the tourism sector (more than 20% of local active units).** This is the case for regions in the western part of the territory, such as Tirol, Salzburg and Carinthia in Austria, Coastal Croatia, Bosnia and Herzegovina, as well as in some German regions (Freiburg, Niederbayern, Oberpfalz, Stuttgart or Schwaben). At the same time, neighbouring regions in the same area display moderately-high shares of the indicator, and the same is true for almost all Romanian regions and important parts of Bulgaria. For the western part of the territory, existing disparities might be explained by the fact that these regions are also part of the industrial core of the EU, with manufacturing and support services playing a major role in the regional economies. The moderately-low (10-15%) shares in Hungarian, Serbian and Bulgarian regions might indicate an underexploited potential, along the same lines.

In addition, there is an overlap between the contribution of tourism to local business environment and the featuring of tourism as a RIS3 priority, as shown in Figure 4. The shades of blue and red indicate no RIS3 featuring of tourism, which for Hungary and Slovakia shows low contribution of tourism to the regional economies, while for Bulgaria the results are rather mixed. **Supporting entrepreneurship in the sectors related to tourism should be coherent with regional strategies and plans, either directly or indirectly.**

**FIGURE 4 REGIONS THAT FEATURE TOURISM AS A TOPIC IN RIS3**



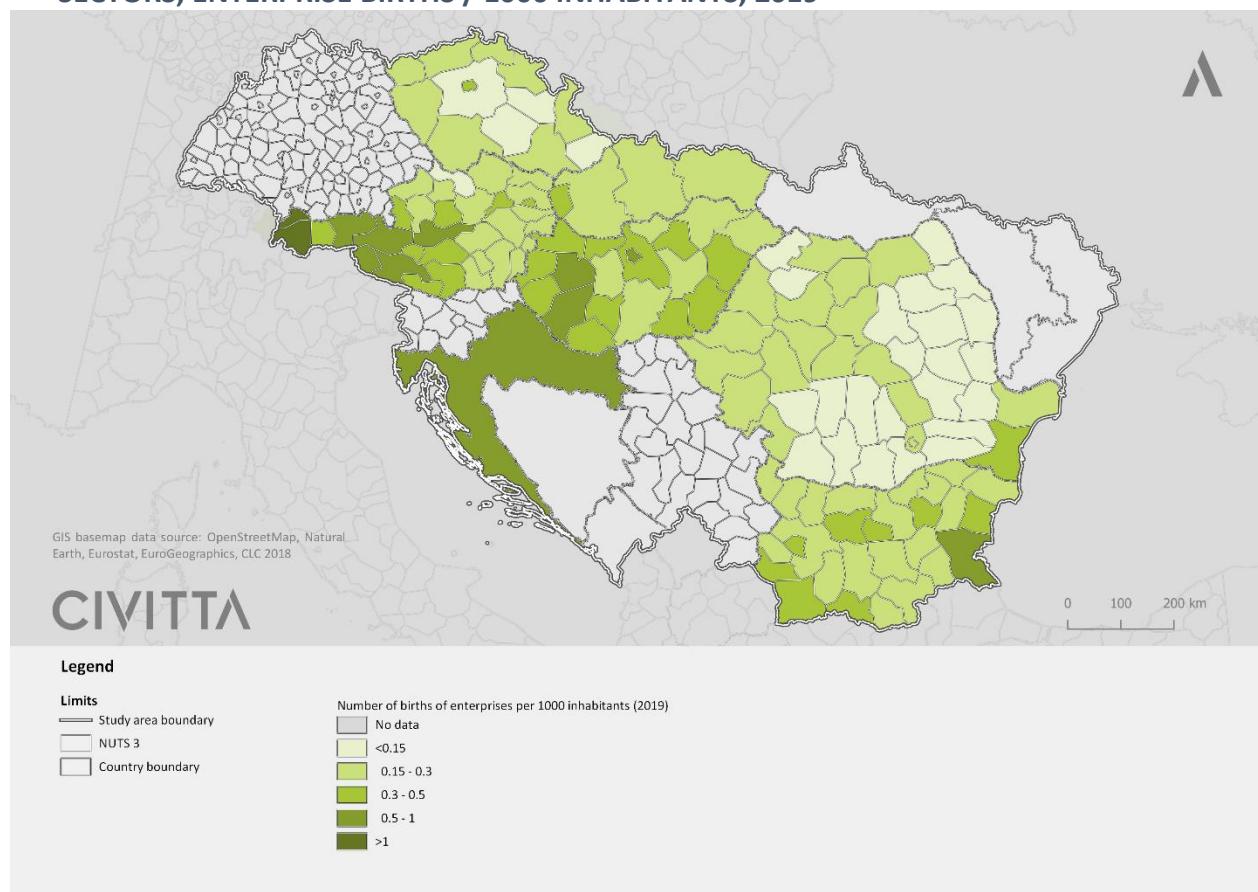
Source: Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

Two additional indicators help provide a clearer understanding of the entrepreneurial and business environment related to touristic activities in the study area. Firstly, the **number of newly created enterprises per 1000 inhabitants, or the entrepreneurial capacity, in the sectors directly related to tourism (accommodation and food and beverages services)**, shows the interest and potential to harvest new companies as a result of increased demand, identified market gaps or entrepreneurial appetite. **In the EUSDR territory, the indicator varies according to the intensity of touristic activity (Tirol - AT, Burgas - BG, all Croatia), but also based on the overall economic conditions.** For example, in capital city regions, where the values are moderately-high, an increase in the entrepreneurial capacity can be explained through the overall increased economic dynamism, ability to support entrepreneurs, attractiveness for the youth (usually the category mostly attracted to entrepreneurship).

At the same time, the higher density of newly created firms is related to a lower population, at least in Austrian regions in mountain areas, where tourism is the main economic activity. Supporting entrepreneurship in less dynamic regions (parts of Romania) is also a matter of ensuring the critical mass of both potential entrepreneurs and clients for those newly created businesses - as such, it is

expected that more effort should be put in supporting the overall economic development, with these consumption-driven sectors to follow on the longer term.

**FIGURE 5 ENTREPRENEURIAL CAPACITY IN THE ACCOMMODATION AND FOOD AND BEVERAGES SECTORS, ENTERPRISE BIRTHS / 1000 INHABITANTS, 2019**



Source: Own calculation based on Eurostat data

Not only the rate of creation of new enterprises shows the dynamism of the sectors, but it also matters whether these companies survive or not beyond the 3-year critical period. Survival rate largely depends on the existing market conditions (availability of customers, market size), but also on the experience of the founder, ability to deal with connected tasks (marketing, finances, legal aspects), human resources availability.

At the EUSDR territory level, over 40-50% of newly created enterprises in the tourism-related sectors have survived beyond the 3-year period. The territory is rather balanced with respect to this indicator, with slightly higher survival rates in the northern and western parts of the territory. At the EU level, the average is slightly higher in all sectors (around 55%), however in tourism the vulnerability of new enterprises depends largely on external factors (seasonality, flows of customers/tourists, understanding the specificities of the sector). It also important to mention that in tourism, similar to the overall situation, higher survival rates are observed in regions with lower entrepreneurial capacity (or lower birth rate) (ESPON SMEs, 2017). Enterprises survival rates are likely to be severely affected in the post-2020 period, with entrepreneurs opening new businesses in 2020-2021 facing major challenges due to the COVID-19 pandemic.

Travel and tourism account for larger shares in ME and HR, both directly and indirectly, and together with AT, they have among the highest employment contributions in the national economies. However, the Employment multiplier is between average and higher than average, which means that tourism is indeed among the priority sectors of their economies.

**TABLE 2 MACROECONOMIC INDICATORS RELATED TO TRAVEL&TOURISM IN THE EUSDR TERRITORY**

Indicator	ME	HR	AT	BG	SI	BA	DE	HU	MD	CZ	SK	RO	RS	UA
T&T % share of GDP (direct contribution)	10.4	10.9	7.7	3.1	3.4	2.8	3.5	2.6	1	2.7	2.6	1.5	2.4	1.4
T&T % share of GDP (total contribution)	32.1	25	11.8	10.8	9.9	9.3	9.1	8.3	7.3	6.5	6.3	5.9	5.9	5.9
Income multiplier	3.1	2.3	1.5	3.5	2.9	3.3	2.6	3.2	7.3	2.4	2.4	3.9	2.5	4.2
T&T share of employment (direct contribution)	6.8	10	8.7	2.9	3.9	3.2	6.8	4.9	0.8	4.2	2.7	2.6	2.1	1.3
T&T share of employment (total contribution)	32.8	25.1	12.5	10.6	10.3	9.6	12.5	10	7.6	8	6.3	6.3	6.2	6.2
Employment multiplier	4.8	2.5	1.4	3.7	3.7	3	1.8	2	9.5	1.9	2.4	2.4	3	4.8

Source: "Expert advice on cooperation in tourism industry during the pandemic crisis",  
 Deliverable 1: "The impact assessment analysis for the four Macro-regional strategies"

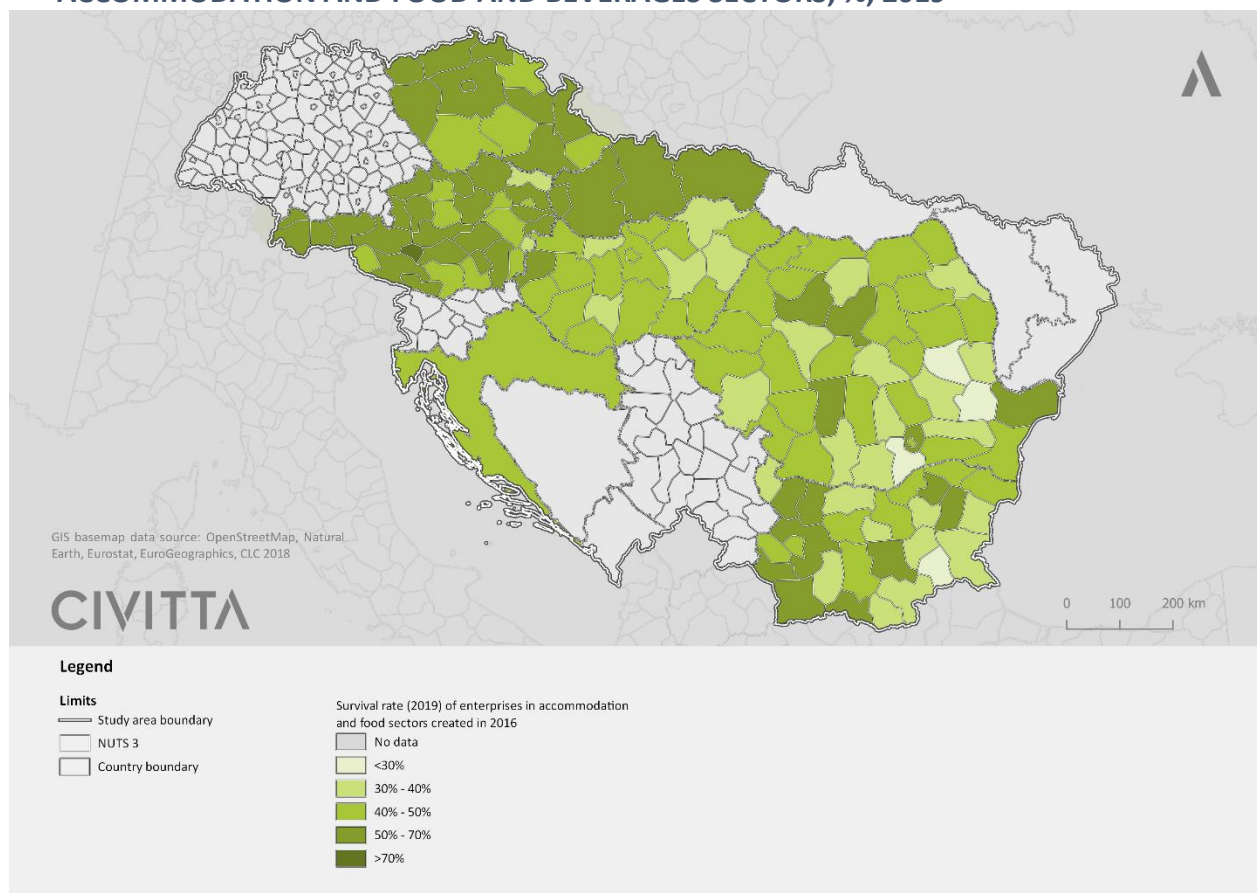
Data retrieved from WEF, 2019, Travel & Tourism Competitiveness Index and WTTC, 2020,  
 Annual Research Key Highlights

While tourism often creates income-earning opportunities and can play a major role in favouring growth or demographic stabilization for mountain communities, it may also lead to significant challenges for the destinations. Apart from the many positive effects of tourism, the local population and environment may also suffer from high tourism intensity, especially when the number of tourists is disproportionate to the local population.<sup>1</sup>

At the same time, whether and how many tourists visit a destination matters more to the local and regional economy in some regions than in others. Employment in related sectors provides a good understanding of the importance of tourism for local and regional development.

<sup>1</sup> Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

**FIGURE 6 SURVIVAL RATE OF ENTERPRISES CREATED IN 2016 AFTER 3 YEARS OF LIFE IN THE ACCOMMODATION AND FOOD AND BEVERAGES SECTORS, %, 2019**



Source: Own calculation based on Eurostat data

Tourism is a major contributor to employment creation particularly for women, youth, migrant workers, rural communities and indigenous peoples and has numerous linkages with other sectors. Therefore, tourism can lead to the reduction of poverty and to the promotion of socio-economic development and decent work. However, if tourism does not respect local cultures and is uncontrolled, unsustainable or not socially accountable, it can also have a negative impact on local communities, their heritage and environment, deepening inequalities. *Employment and labour market conditions will be further addressed in Report 1.2.*

Tourism was expected to grow by 2022, but the context of the pandemic has changed the way people choose to spend their holidays. The pandemic has restricted the movement of tourists, flights and travel has been cancelled, and most destinations, which depended on the large number of tourists each year, have suffered huge financial losses. *Section 3.5. address the topic of resilience and impact of COVID-19 more broadly.*

## Migration

Tourism & culture and migration are interrelated concepts, both in the context of the country of origin and of the country of destination. However, the link between the two can be both direct and

indirect, with effects being observed on both short and long term. Literature<sup>2</sup> identifies several areas of impact that are related to migration:

*Country of origin:*

- Economic contribution through remittances and migrant investments;
- Cultural exchanges;
- “brain drain” - over short and medium term;
- Savings on health and social security provision;
- Reduction in tax revenues;
- Higher value visitors;
- Well-informed investment in travel, tourism and hospitality;

*Country of destination:*

- Economic contribution - migrants work in various sectors, from low-skilled (hospitality industry, constructions, retail) to high-skilled sectors (healthcare, IT, engineering);
- Cultural enrichment - enhanced cultural sensitivity, enhanced language skills;
- Additional pressure on social and economic structures;
- Competition leading to wage reduction (short term);
- Counteracting population decline and ageing;
- Increased tax revenues and consumer spending;
- Crime and human trafficking;
- Social conflict;
- Growth in travel services;
- Enhanced visibility in origin markets;

Different categories of migrants develop a certain type of influence with the tourism sector in both the origin and destination countries, such as:

***Migrants with the purpose of labour:*** usually connected with low-skilled, low-value added sectors, and have either temporary or permanent character. It usually accounts for a significant share of total migration, being triggered by labour market insecurity, weak employment opportunities in the origin countries or payment differences. Tourism is connected to this migrant category as follows:

- Increased use of passenger transport to go and return - both the migrants and their families - *linked to higher air passenger traffic in small towns and / or increased road passenger traffic;*
- Facilitate consumption or investment in the tourism sector - *usually during the holidays spent in the origin countries*, also showing a slightly increased propensity to spend on tourism services when home;
- Indirect effects - promoting the origin country to acquaintances in the destination country;
- Low potential to increase the diversity to the supply of tourism services in the destination country, as well as low or middle propensity to spend on visitor attractions and tourism in the destination country. *Instead, they usually prefer to save earned income and/or remit it to the country of origin where it can be used in other economic sectors/with other purposes;*

***High skilled and business migrants:*** usually includes people with higher qualifications, such as managers, executives, professionals - people with highly specialized skills. This category is closely

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<sup>2</sup> Tourism and Migration - Exploring the relationship between two global phenomena, 2009

connected to higher earnings, scarce time availability, youth migration after graduation and/or facilitated by access to international education and/or international companies. In their case, there are other features that describe their behaviour as tourists / their effect on tourism:

- Increased passenger traffic to go and return - but preference is for time-saving options, such as air travel;
- They have higher capacity to accommodate friends and family - therefore, they encourage visits from their origin countries;
- Higher propensity to spend on visitors' attractions and tourism services when abroad, as well as on gifts / cultural artifacts;
- Higher potential to establish or invest in a tourism operation or property in the country of destination or origin, or any other third country - decision is driven by business opportunity;

**Resident migrants:** defined as people who hold a second residence which eventually becomes their main residence in another country. Specific features include:

- Relatively frequent travel to and from origin country;
- Propensity to spend on tourism services on return similar to the level of spending when abroad;
- Employment of local workforce (also consisting of migrant workers) to construct residences and upkeep estate;
- Potential to contribute labour, know-how, language skills and new technologies to the local tourism sector

The Danube macro-region is characterized by an East-West migration pattern, as well as a non-EU to EU countries flow of people. While no data is available at NUTS2 level on migration flows, the national level data allows the identification of specific features related to people mobility. The UN Department of Economic and Social Affairs publishes complete data on the migrant stock by country of origin and destination at mid-year. The data are not compiled yearly, given the difficulty to obtain data from national statistics, thus the last available year is 2017<sup>3</sup>.

With the EUSDR territory being home to a multitude of cultures and ethnicities, the migrant stock contributes to an enhanced cultural landscape, through intangible heritage elements (customs, traditions, traditional food and celebrations), language, values and beliefs. Some key aspects presented below help identify the importance of migrants in the EUSDR countries:

- The EUSDR territory is mostly a **sending** macro-region, with more people choosing to live in countries outside their country of origin. However, there are some countries mostly receiving immigrants from abroad (*the number of foreign migrants is higher than the number of people moving in*): Austria (+1.4 mil. people in 2017), Germany<sup>\*4</sup> (+7.9 mil. people in 2017), Slovenia (101 thousand people in 2017);
- Countries mostly **sending** emigrants abroad are mostly located in the Balkans or in the Eastern part of the territory. The highest difference between incoming and outgoing migrants is visible in: Romania (3.2 mil. people), Bulgaria (1.1 mil. people), Ukraine (0.97 mil. people) and Moldova (0.8 mil. people). Free movement of people within the EU has

<sup>3</sup> More recent immigration and emigration data by country and age groups will be available in report 1.2, linked to the labour market conditions and features.

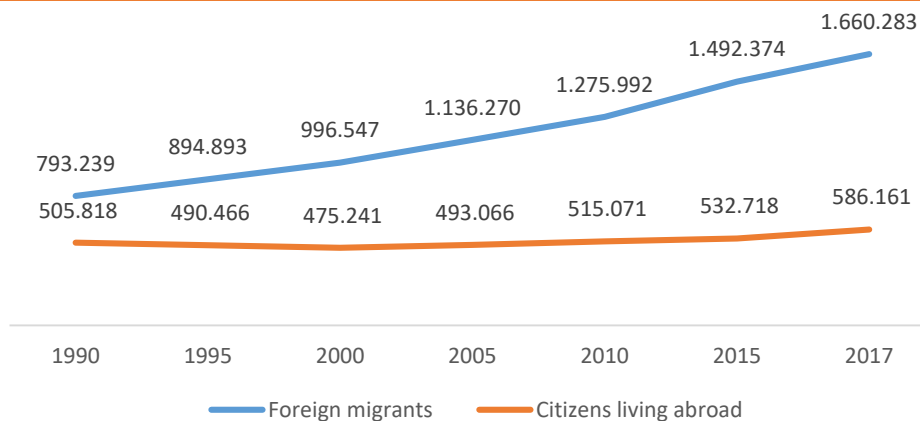
<sup>4</sup> For Germany, only national-level data is available. However, given that the two NUTS2 regions included in the EUSDR territory have a high socio-economic development, it is likely that the same trend is visible.

accelerated this trend for Romania and Bulgaria, a massive increase in the net outmigration being noticed after 2010 (in 2007 the two countries joined the EU).

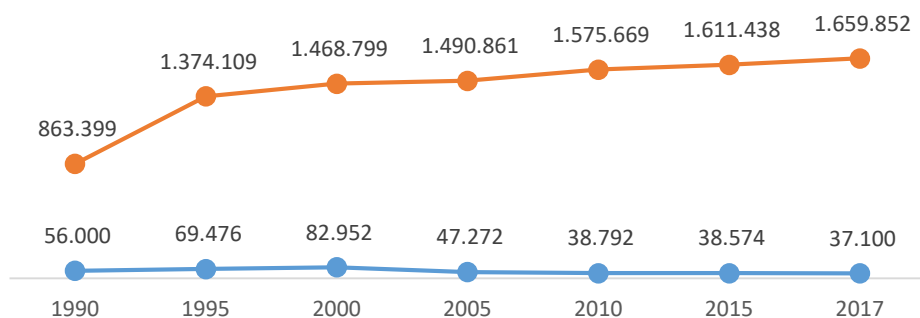
- Altogether, these flows of people lead to brain drain, youth and labour force migration, ageing and labour market shortages in the origin countries, deepening the socio-economic divide to the West.
- Countries with similar or higher income per capita are preferred by migrants from Austria and Germany, especially outside the EU: Switzerland, USA or Canada rank among the most popular destinations and concentrate the largest communities of migrants from these countries. In their case, the factors triggering migration are mainly related to living standards, quality of life, high skilled jobs availability.
- Countries in the Eastern block that joined the EU in 2004 (Czechia, Slovakia, Slovenia, Hungary, Croatia) display different patterns, the language and cultural affinity playing a major role. Also, these countries are mostly sending migrants to Germany or neighbouring countries, while also choosing the USA or UK as preferred destinations.
- Largest Romanian and Bulgarian communities of migrants are found in Italy and Spain (for RO), given the language similarities, and Turkey and Spain for BG - with proximity playing an important role.

The summary below provides an overview on how the migrant stock has evolved in the past 30 years in the EUSDR countries, while also displaying the most preferred destinations for incoming and outgoing migrants by country - top 10 countries of destination and origin, as well as evolution of migrant stock.

## AUSTRIA



## BOSNIA AND HERZEGOVINA



## MIGRANT STOCK LIVING IN AUSTRIA

Germany	223,705
Serbia	195,177
Turkey	184,847
Bosnia & Herzegovina	155,164
Romania	70,267
Poland	65,989
Czechia	54,997
Hungary	44,468
Croatia	40,006
Russia	30,972

## AUSTRIAN CITIZENS LIVING ABROAD (STOCK)

Germany	258,452
Switzerland	67,514
USA	50,304
Australia	21,423
Canada	19,875
UK	17,790
Turkey	17,009
Italy	16,618
France	12,749
Hungary	9,917

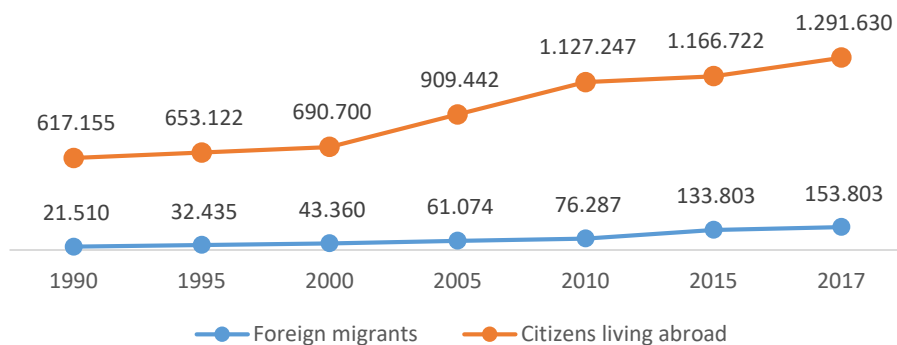
## MIGRANT STOCK LIVING IN BOSNIA AND HERZEGOVINA

Croatia	37,100
Serbia	12,287
Montenegro	9,831
Slovakia	4,229
Macedonia	3,259
Slovenia	2,961
Germany	1,886
Romania	453
Austria	201
Russia	170

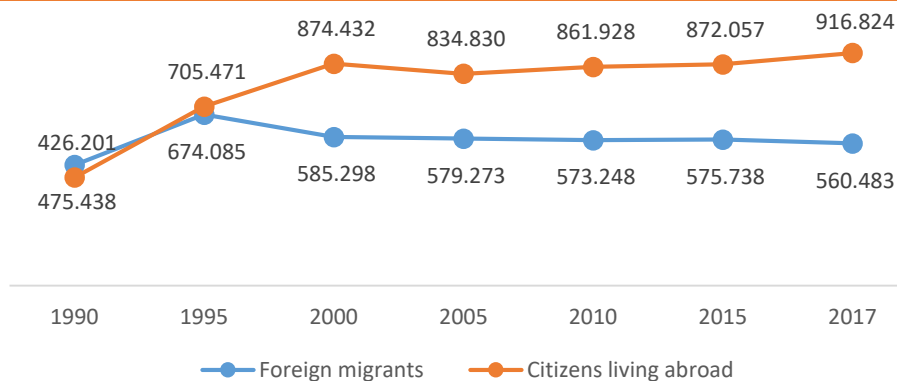
## BOSNIAN CITIZENS LIVING ABROAD (STOCK)

Croatia	394,146
Serbia	333,687
Germany	200,510
Austria	170,864
USA	125,442
Slovenia	103,663
Switzerland	59,685
Sweden	58,372
Australia	43,456
Canada	41,722

### BULGARIA



### CROATIA



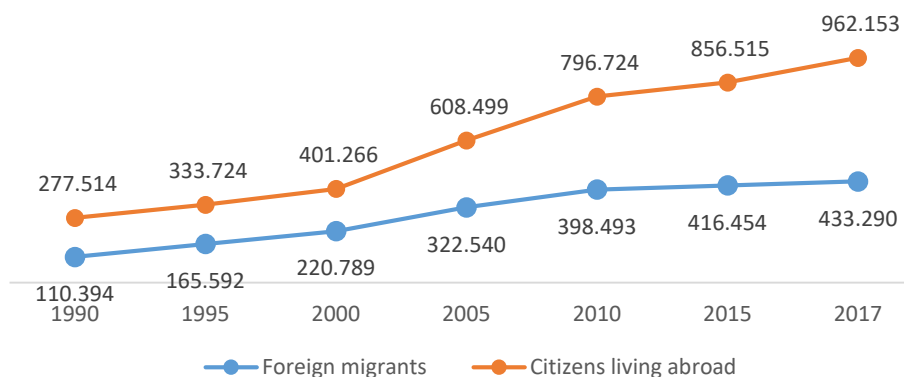
### MIGRANT STOCK LIVING IN BULGARIA

Russia	30,950	Turkey	70,585
Greece	11,688	Spain	128,078
Turkey	9,867	Germany	105,686
Ukraine	9,639	UK	72,586
Romania	8,524	USA	72,442
UK	8,025	Greece	71,571
Spain	6,440	Italy	58,705
Germany	5,763	Netherlands	23,456
Serbia	4,190	Canada	20,410
Macedonia	3,777	France	17,893

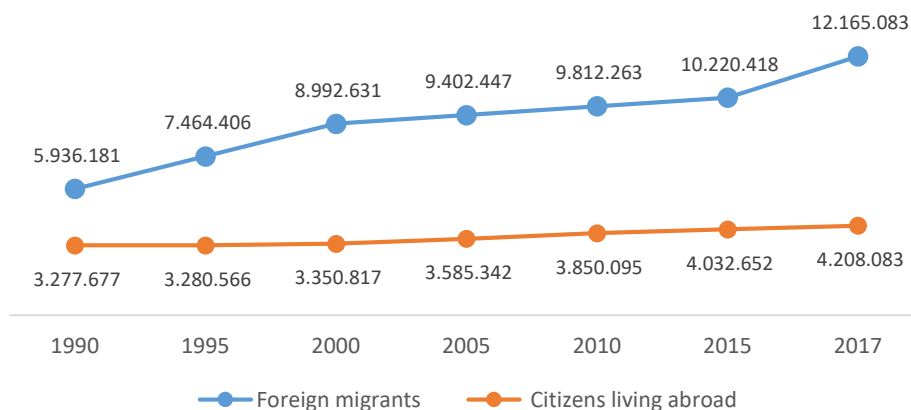
### MIGRANT STOCK LIVING IN CROATIA

Estonia	49,828	Serbia	281,304
Lithuania	32,879	Germany	210,184
Indonesia	19,068	Canada	93,048
Latvia	14,451	Australia	73,275
Republic of Korea	9,788	Slovenia	46,477
Morocco	6,017	USA	44,218
Nigeria	5,011	Austria	44,053
Luxembourg	4,852	Italy	25,143
Bolivia	3,056	Switzerland	22,576
Finland	2,929	Montenegro	14,055

### CZECH REPUBLIC



### GERMANY



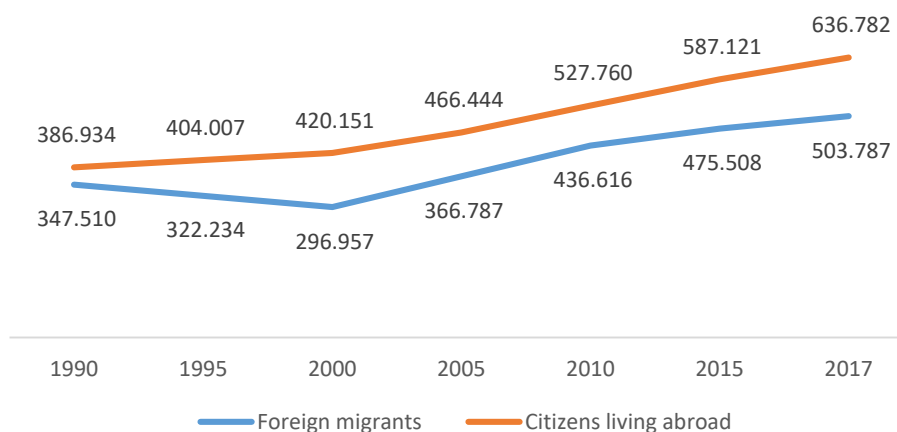
### MIGRANT STOCK LIVING IN CZECHIA

MIGRANT STOCK LIVING IN CZECHIA		CZECHIAN CITIZENS LIVING ABROAD (STOCK)	
Ukraine	136,287	Germany	545,361
Slovakia	76,649	Slovakia	92,832
Viet Nam	58,039	USA	74,639
Russian Federation	31,228	Austria	60,561
Poland	20,531	UK	51,552
Germany	12,129	Canada	23,706
Moldova	10,740	Australia	15,031
Bulgaria	6,709	Switzerland	14,763
Mongolia	5,716	Russia	11,264
China	5,219	Italy	10,586

### MIGRANT STOCK LIVING IN GERMANY

MIGRANT STOCK LIVING IN GERMANY		GERMAN CITIZENS LIVING ABROAD (STOCK)	
Poland	1,936,653	USA	645,314
Turkey	1,661,588	Switzerland	376,007
Russia	1,084,151	Turkey	324,602
Kazakhstan	1,020,277	UK	300,983
Romania	592,182	Austria	246,340
Czechia	545,361	France	237,178
Italy	415,875	Italy	223,883
Ukraine	262,027	Kazakhstan	223,789
Austria	258,452	Spain	202,544
Greece	215,784	Canada	177,129

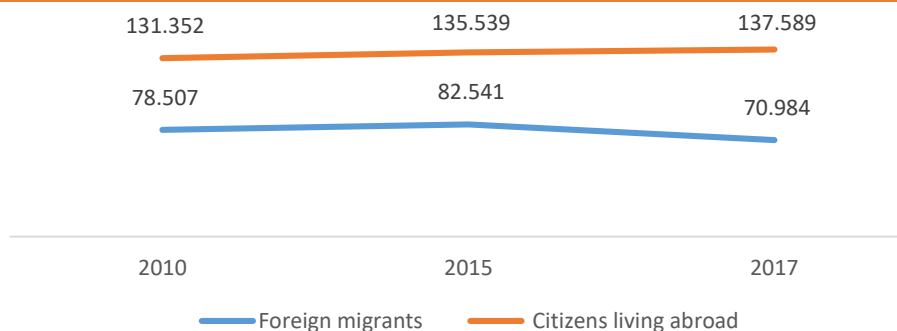
## HUNGARY



## MIGRANT STOCK LIVING IN HUNGARY

		HUNGARIAN CITIZENS LIVING ABROAD (STOCK)	
Romania	208,490	Germany	173,338
Ukraine	50,253	UK	84,155
Serbia	41,428	USA	77,488
Germany	31,721	Austria	48,967
Slovakia	21,158	Canada	45,326
China	18,204	Australia	24,255
Austria	9,917	Slovakia	18,229
UK	9,392	Switzerland	18,173
USA	8,216	Russia	16,852
Italy	5,261	Sweden	16,722

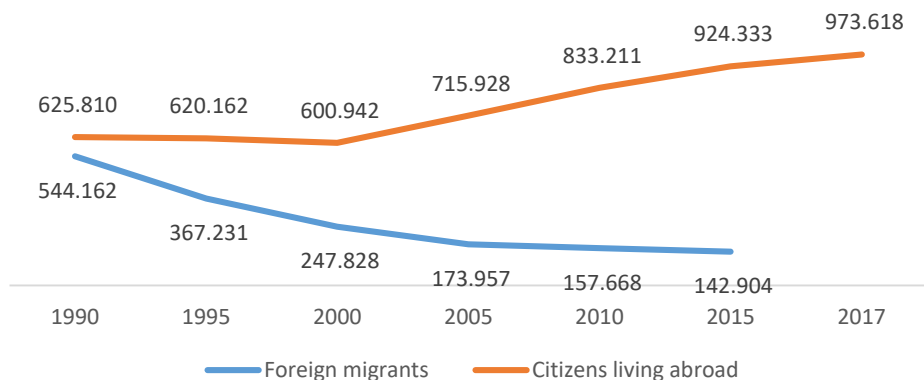
## MONTENEGRO



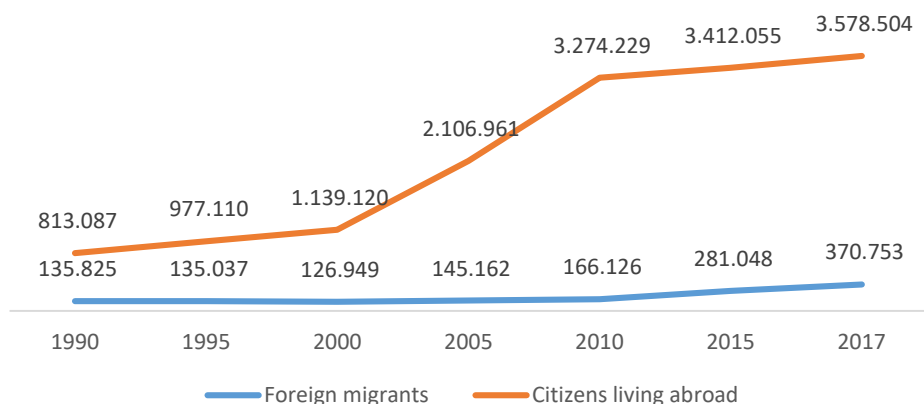
## MIGRANT STOCK LIVING IN MONTENEGRO

		MONTENEGRO CITIZENS LIVING ABROAD (STOCK)	
Bosnia and Herzegovina	29,462	Serbia	70,735
Serbia	14,992	Austria	24,052
Croatia	14,055	Macedonia	9,246
Macedonia	2,852	Luxembourg	9,065
Albania	2,368	Croatia	6,017
Germany	1,613	Bosnia and Herzegovina	4,229
Slovenia	1,390	Switzerland	2,900
Russia	795	Italy	2,325
France	383	Australia	2,123
USA	272	Canada	1,772

### MOLDOVA



### ROMANIA



### MIGRANT STOCK LIVING IN MOLDOVA

Ukraine	62,728
Russia	58,073
Kazakhstan	5,079
Belarus	3,259
Romania	1,322
Uzbekistan	1,035
Azerbaijan	964
Georgia	913
Germany	880
Italy	239

### MOLDOVIAN CITIZENS LIVING ABROAD (STOCK)

Russia	294,522
Italy	169,753
Romania	151,249
Ukraine	151,242
USA	43,219
Germany	23,273
Portugal	20,076
Spain	17,246
Canada	14,178
Kazakhstan	12,348

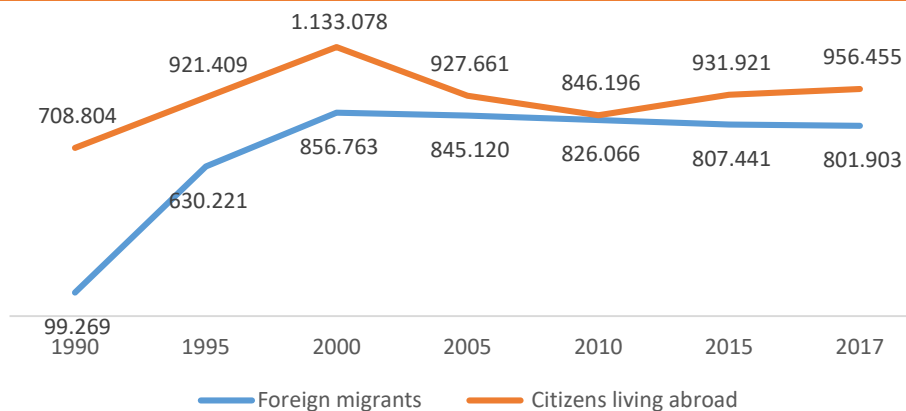
### MIGRANT STOCK LIVING IN ROMANIA

Moldova	151,249
Italy	50,893
Spain	39,492
Ukraine	15,698
Bulgaria	13,805
Germany	8,643
France	8,536
Hungary	8,469
Turkey	7,992
Serbia	7,628

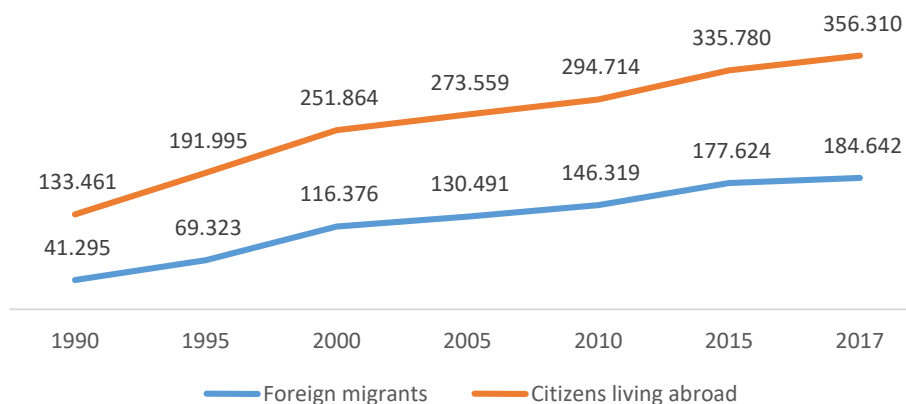
### ROMANIAN CITIZENS LIVING ABROAD (STOCK)

Italy	1,039,584
Spain	652,312
Germany	592,182
UK	231,358
Hungary	208,490
USA	174,960
Israel	101,121
Canada	96,031
France	91,158
Austria	77,376

### SERBIA



### SLOVAKIA



### MIGRANT STOCK LIVING IN SERBIA

Bosnia and Herzegovina	333,687
Croatia	281,304
Montenegro	70,735
Macedonia	46,416
Germany	15,972
Slovenia	10,855
Austria	6,950
France	5,351
Romania	3,582
Russia	2,923

### SERBIAN CITIZENS LIVING ABROAD (STOCK)

Austria	214,925
Switzerland	174,909
Germany	107,032
France	85,988
Croatia	49,828
Italy	46,382
Canada	45,379
Hungary	41,428
Australia	39,805
USA	37,701

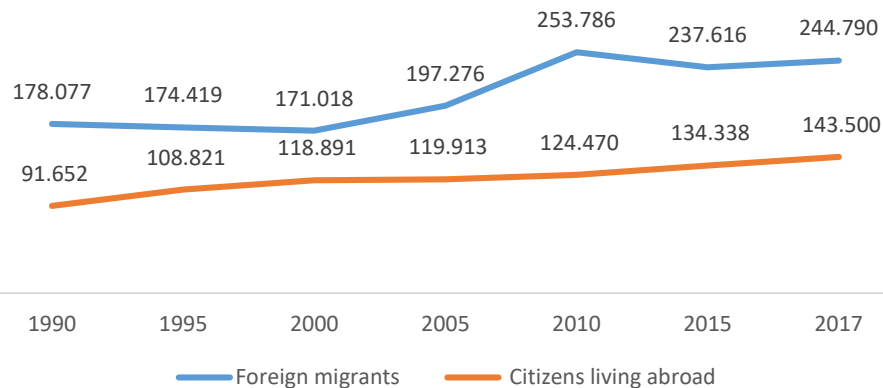
### MIGRANT STOCK LIVING IN SLOVAKIA

Czechia	92,832
Hungary	18,229
Ukraine	10,396
Romania	8,474
Poland	7,005
United Kingdom	5,083
Germany	4,855
Austria	3,278
France	3,090
Russia	2,880

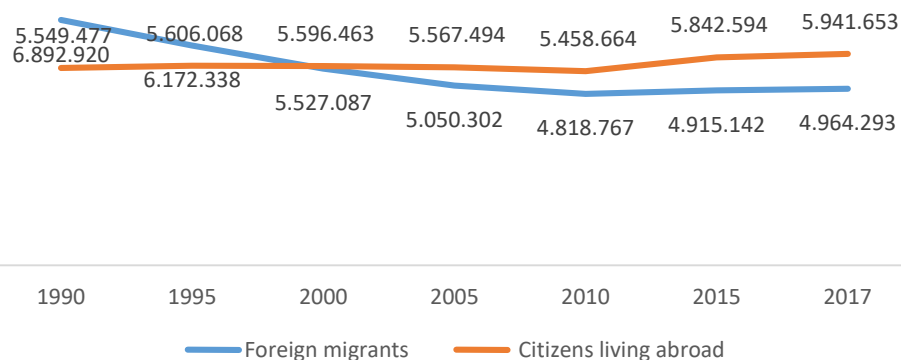
### SLOVAKIAN CITIZENS LIVING ABROAD (STOCK)

UK	89,422
Czechia	76,649
Germany	42,999
Austria	29,919
Hungary	21,158
Canada	15,283
Switzerland	12,934
Ireland	12,731
Italy	11,189
Spain	7,366

## SLOVENIA



## UKRAINE



## MIGRANT STOCK LIVING IN SLOVENIA

Bosnia and Herzegovina	103,663	Germany	39,871
Croatia	46,477	Austria	19,719
Seychelles	24,537	Croatia	19,068
Kuwait	16,295	Serbia	10,855
France	16,005	Canada	9,655
Ghana	7,455	USA	9,510
Jamaica	3,873	Australia	8,992
Morocco	2,876	Italy	4,781
Austria	2,755	Switzerland	4,061
Rwanda	2,570	France	2,631

## MIGRANT STOCK LIVING IN UKRAINE

Russia	3,309,525	Russia	3,272,304
Belarus	247,989	USA	377,365
Kazakhstan	224,467	Kazakhstan	346,445
Uzbekistan	222,012	Germany	262,027
Moldova	151,242	Italy	236,420
Azerbaijan	83,121	Belarus	224,847
Georgia	65,042	Poland	209,001
Armenia	47,780	Czechia	136,287
Tajikistan	29,660	Israel	131,780
Kyrgyzstan	26,996	Uzbekistan	123,355

## Touristic and cultural potential

Tourism is by far one of the activities that have the closest link with territorial characteristics - landscape (natural endowment), natural conditions (weather, season), as well as with specific resources that are available to the traveller to a larger or smaller extent - accommodation, access roads, food, local habits, language. This provides a multitude of combinations of factors that in turn generate various experiences for tourists, with a significant chance of uniqueness for every journey (Romao et al., 2017, p. 3). These features are even more visible in a vast and diverse territory, such as the Danube macroregion - where there are regional variations depending on geography and climate, transport and accommodation, seasonality, origins of tourists, and economic dependency on the sector. All factors are important to understanding the multifaceted nature of tourism regions in the EUSDR territory.

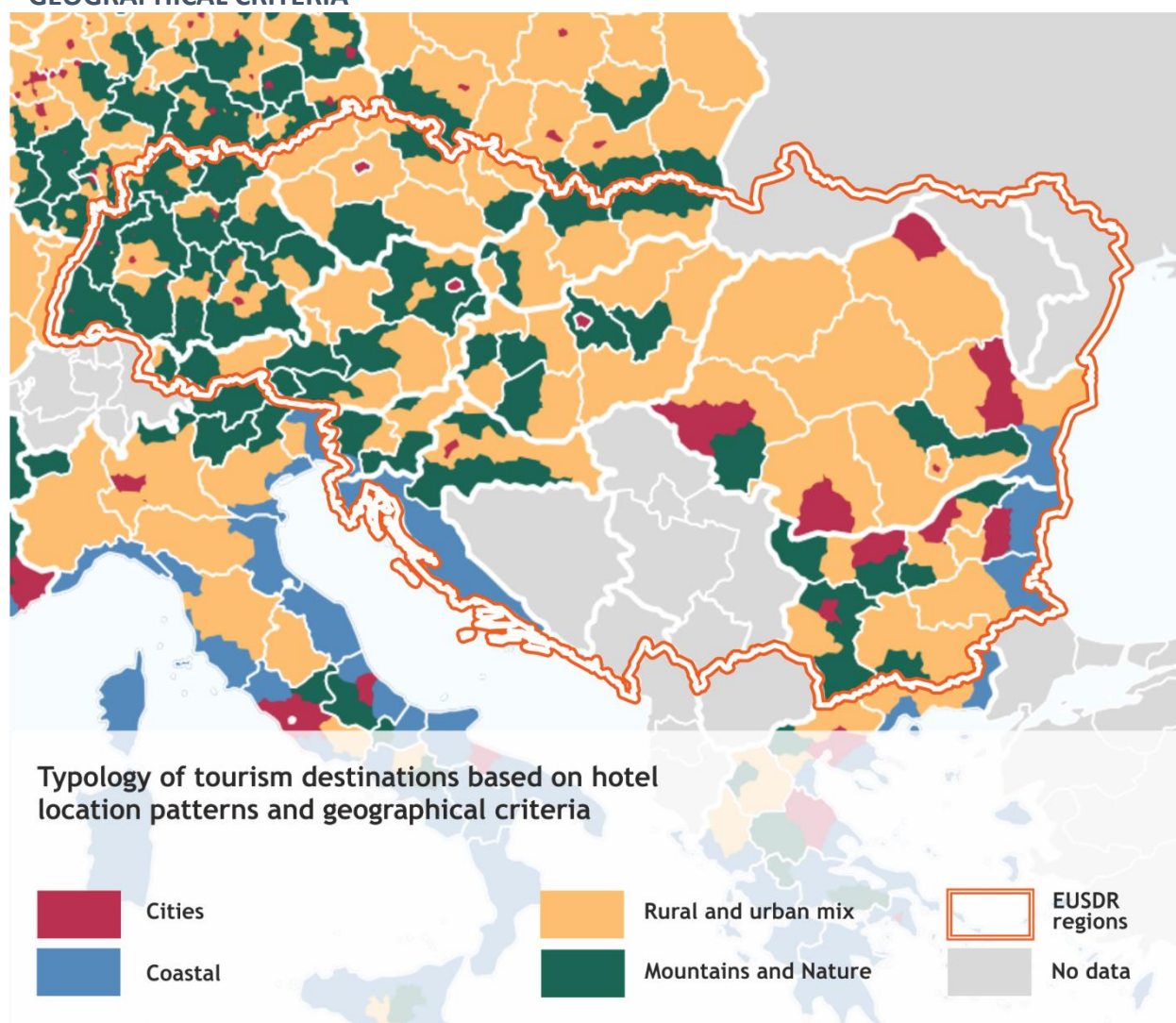
At the moment there is no comprehensive European regional tourism typology, and the EUSDR territory can neither be attributed to a single tourism typology as well, however, various forms of tourism are often attributed to the area, the purpose (e.g., leisure, business or health) and the type of activity or product. Predominant examples are:

- sun – beach;
- winter – mountain / skiing;
- rural – active / natural;
- urban – cultural / shopping;
- business – MICE;
- health – wellness;
- wine & food – gastrotourism.

Additionally, the study “*Regional impacts of the COVID-19 crisis on the tourism sector*” (EC, 2021) proposes several types of tourism, based on the origin of tourists, their demand and the destinations they choose, as outlined in Figure 7 below.

Similar to the EU-level situation, most forms of tourism are not well defined and are subject to interpretation. However, some broad types matching different types of regions can be identified: most of the regions in the EUSDR area are part of a rural and urban mix type of tourism, while part of the northwestern area has a mix between natural and mountain tourism – along with mixed rural and urban areas. At the same time, the Croatian coast as well as part of Bulgaria have coastal and maritime tourism, while most large cities (especially capital cities) are known for city tourism (Budapest, Prague, Wien). In Romania and Bulgaria, there is a significant share of city tourism.

**FIGURE 7 TYPOLOGY OF TOURISM DESTINATION BASED ON HOTEL LOCATION, PATTERNS AND GEOGRAPHICAL CRITERIA**



Source: Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

In many cities, regions, and countries, tourism plays a critical role as a strategic pillar of the economy's GDP. The tourism and leisure industry plays a vital role in economic activities and customer satisfaction, but it has also become the most vulnerable industry member.<sup>5</sup>

Culture, defined as arts, literature, traditions, languages, values and beliefs, is almost universally thought of as being important to tolerance and integration, while the expressive activities that derive from it are important to at least three-quarters of Europe's population.<sup>6</sup> Thus, cultural participation is reasonably constant across the age spectrum, there is also more emphasis on communal and social attendance among young people. The market for culture, though, continues to be a major driver of city economic health.

<sup>5</sup>Jaffar Abbas, Riaqa Mubeenb, Paul Terhemba loremb, Saqlain Raza, Gulnara Mamirkulova, Exploring the impact of COVID-19 on tourism: transformational potential and implications for a sustainable recovery of the travel and leisure industry, 2021

<sup>6</sup> <https://www.eesc.europa.eu/sites/default/files/resources/docs/qe-04-16-540-en-n.pdf>

Culture is at the core of Europe's rich heritage and history and has an important role in enhancing the attractiveness of places and strengthening the unique identity of a specific location. Culture and creativity can also be important drivers and enablers of innovation as well as an important source for entrepreneurship. Furthermore, culture is a key driver for increasing tourism revenue, with cultural tourism being one of the largest and fastest growing tourism segments worldwide.<sup>7</sup>

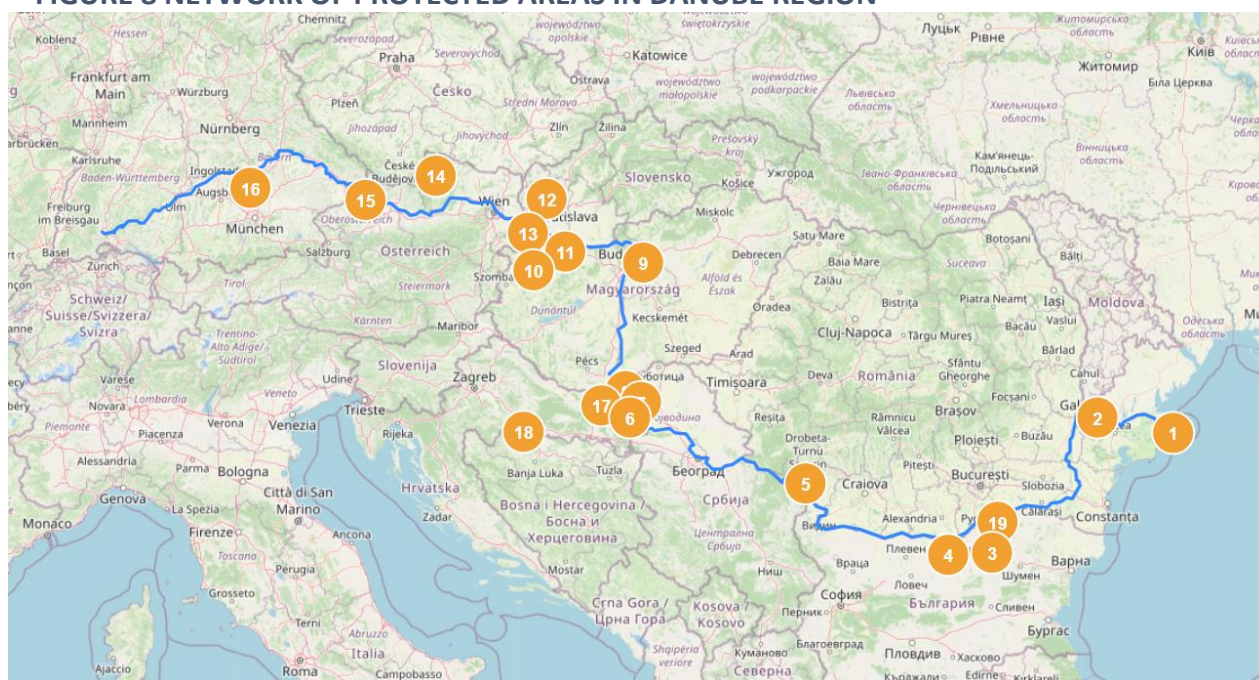
## Natural heritage and resources

The Danube Region is a major international hydrological basin and ecological corridor. This requires a regional approach to nature conservation, spatial planning and water management. The Danube Region also has many opportunities - it includes natural, built and archaeological sites, museums, monuments, artworks, historic cities, literary, musical and audiovisual works, and the knowledge, practices and traditions of European citizens.

Besides the fascinating biodiversity of the region, the Danube Transnational Programme area<sup>8</sup> represents one of the richest regions in Europe in terms of variety of cultures. The incredible diversity of ethnic groups (nearly 30) with their own languages, religions, architectures and traditions put an individual print on the area. It can be observed that in most of the cases the value of the cultural heritage was acknowledged and there are many sites put under protection. This is proven by the number of world heritage sites which can be found in the Danube region. There are 65 world heritage cultural sites in the area, which are supplemented by 9 natural heritage sites, altogether creating a very attractive destination for tourism, including eco-tourism.

There are several extensive such areas and many of them are situated along the region's borders, which means that there are territories with significant natural values which could be protected transnationally due to their exceptional flora, fauna and/or landscape shared by the neighbouring countries.

**FIGURE 8 NETWORK OF PROTECTED AREAS IN DANUBE REGION**



<sup>7</sup> [https://ec.europa.eu/regional\\_policy/en/policy/themes/culture/](https://ec.europa.eu/regional_policy/en/policy/themes/culture/)

<sup>8</sup> <https://www.interreg-danube.eu/uploads/media/default/0001/42/6ff7e04c2fe26221ef9c572f844e50e3061d5628.pdf>

Due to its large area and very diverse habitats, the Danube River is one of the most important natural treasures of Europe and a backbone for biodiversity conservation. Over 2.000 plant and 5.000 animal species live in or by the waters of the Danube, which made possible to exist around 19 Protected Areas.

**FIGURE 9 PROTECTED AREAS IN DANUBE REGION**

1 ROMANIA DANUBE DELTA BIOSPHERE RESERVE	2 MOLDOVA LOWER PRUT NATURE RESERVE	3 BULGARIA RUSENSKI LOM NATURE PARK	4 BULGARIA PERSINA NATURE PARK
5 ROMANIA IRON GATES NATURAL PARK	6 CROATIA KOPAČKI RIT NATURE PARK	7 SERBIA GORNJE PODUNAVLJE NATURE RESERVE	8 HUNGARY DUNA-DRÁVA NATIONAL PARK
9 HUNGARY DUNA-IPOLY NATIONAL PARK	10 HUNGARY SZIGETKÖZ LANDSCAPE PROTECTION AREA, FERTŐ- HANSÁG NATIONAL PARK	11 SLOVAKIA DUNAJSKÉ LUHY LANDSCAPE PROTECTED AREA	12 SLOVAKIA ZÁHORIE PROTECTED LANDSCAPE AREA
13 AUSTRIA DONAU-AUEN NATIONAL PARK	14 AUSTRIA WACHAU PROTECTED LANDSCAPE AREA	15 GERMANY NARROW VALLEY OF THE DANUBE IN PASSAU DISTRICT	16 GERMANY DONAUAUWALD NEUBURG- INGOLSTADT
17 CROATIA REGIONAL PARK MURA- DRAVA IN OSIJEK-BARANJA COUNTY	18 CROATIA LONJSKO POLJE NATURE PARK	19 ROMANIA COMANA NATURE PARK	

Source: <https://danubeparks.org/>

Based on the CESC analysis, the ratio of Natura 2000 areas in the Danube Region can be considered high, and is significantly higher in almost all states compared to the EU average (18%). The leading countries with the **most extensive protected areas** are Slovenia (38%), Croatia (37%), Bulgaria (34%), Slovakia (30%), Romania (23%) and Hungary (21%). Only Germany (15%), Austria (15%) and Czech Republic (14%) remain under the EU average. However, except for Romania almost exclusively, no significant increase in protected areas took place.<sup>9</sup>

**TABLE 3 NATURAL PROTECTED AREAS IN EUSRD REGION**

COUNTRY	NATURAL PROTECTED AREAS
Bulgaria <sup>10</sup>	<p>Protected areas in Bulgaria includes 3 national parks, 11 nature parks and 55 nature reserves.</p> <p>The national policy for governing and management of the protected areas is implemented by the Ministry of Environment and Water.</p> <p>The first nature park in Bulgaria and the Balkan Peninsula is Vitosha Nature Park, established in 1934.</p> <p>All of the nationally protected areas in Bulgaria are also part of the Natura 2000 network of protected natural areas in the territory of the European Union. The Natura 2000 Protected zones in Bulgaria are estimated to be 34.8% of its territory, twice the EU average, making Bulgaria the third in EU when it comes to protected areas share.</p> <p>Currently, the network of protected areas includes: 120 protected areas for protection of wild birds, covering 23.1% of the territory of Bulgaria and 233 protected areas for protection of natural habitats, covering 30.3% of the territory of Bulgaria.</p>

<sup>9</sup> Analysis of territorial challenges, needs and potentials of the Danube Region and strategic options in view of the Transnational cooperation for the period 2021-2027

<sup>10</sup> <https://www.geolandproject.eu/2022/01/20/getting-familiar-with-natura-2000-in-bulgaria/>

COUNTRY	NATURAL PROTECTED AREAS
Romania <sup>11</sup>	<p>There are 14 national parks, 17 natural parks 617 natural reservations, 55 scientific reserves and 234 natural monuments.</p> <p>The protected area network in Romania is strongly influenced by Natura 2000 sites. About 5.18% of the area of Romania has a protected status (12,360 km<sup>2</sup>), including the Danube Delta, which makes half of these areas (2.43% of Romania's area).</p> <p>One of the most important protected areas are: Apuseni Park, Bucegi Park, Brăila Small Puddle, Hațeg Country Dinosaur Geopark, Iron Gates, Maramureș Mountains, Rodnei Mountains National Park etc.</p>
Austria	<p>Austria is a largely mountainous country with an area of close to 84 000 km<sup>2</sup>. It is land-locked and bordered by 8 other countries. There are a total of 1.584 protected areas in Austria, 353 Natura 2000 sites - 100 Special Protection Areas (Birds Directive) and 306 Sites of Community Importance (Habitat Directive) - as well as 1231 sites designated under national laws.</p>
Czech Republic	<p>There are several types of protected areas of the Czech Republic. The main form of landscape protection is delimitation of special protected areas.</p> <p>As of 2021 there are 4 national parks in the Czech Republic: Krkonoše, Podyjí, Šumava, Bohemian Switzerland and 26 protected landscape areas like: Bohemian Paradise, Moravian Karst, Bohemian Forest, Elbe Sandstone Mountains etc.</p>
Croatia	<p>The main protected areas of Croatia are national parks, nature parks and strict reserves. There are 444 protected areas of Croatia, encompassing 9% of the country. Those include 8 national parks in Croatia, 2 strict reserves and 11 nature parks.</p> <p>Each of the national parks is maintained by a separate institution, overseen and funded by the government ministry of nature conservation and spatial development. The State Institute for Nature Protection provides centralized oversight and expertise.</p> <p>The most famous protected area and the oldest national park in Croatia is the Plitvice Lakes National Park, a UNESCO World Heritage Site.</p>
Slovakia	<p>Protected areas of Slovakia are areas that need protection because of their environmental, historical or cultural value to the nation. Protected areas in Slovakia are managed by institutions and organizations governed by the Ministry of the Environment.</p> <p>In Slovakia, there are 9 national parks, 14 protected landscape areas and a network of so called "small-scaled protected areas" (protected sites, nature reserves and nature monuments). An overlap of proposed NATURA 2000 network with currently existing protected areas is 68 %. The area simultaneously represents 54% of total proposed NATURA 2000 network that covers 29% of Slovakia.</p> <p>NATURA 2000 sites are selected within 9 EU biogeographic regions: regions Alpine, Atlantic, Black Sea, Boreal, Continental, Macaronesian, Mediterranean, Pannonian and Steppe.</p>
Slovenia	<p>Protected areas of Slovenia include one national park - Triglav National Park, three regional parks, several natural parks (42), and hundreds of natural monuments and monuments of designed nature (approx. 1.276). The Natura 2000 proposal would increase the totals to 260 sites and 32% of national territory.</p>

<sup>11</sup> <https://biodiversity.europa.eu/countries/romania>

COUNTRY	NATURAL PROTECTED AREAS
Hungary	<p>Protected areas of Hungary include 10 national parks, 35 landscape protection areas and 145 minor nature reserves.</p> <p>The national policy for governing and management of the protected areas is implemented by the Minister of Agriculture (State Secretary for the Environment).</p> <p>The first national park in Hungary at the Great Hungarian Plain is Hortobágy National Park, established in 1973.</p> <p>One of the most important protected areas (which are also World Heritage Site or part of a World Heritage Site) are: Hortobágy, Aggtelek, Danube-Drava, Danube-Ipoly, Kiskunság, Bükk etc.</p>
Bosnia and Herzegovina	<p>Total size of protected area of Bosnia and Herzegovina amounts of 57.83694 hectares which is 1,13% of its entire territory. There are 5 National parks, 8 nature parks, 2 areas proposed for protection.</p> <p>As of 2021, there are four sites in Bosnia and Herzegovina on the list and a further 10 on the tentative list.</p>
Serbia	<p>There are 5 national parks in Serbia and one more which is proposed and is in the procedure of receiving the status of the National Park.</p> <p>There are 22 nature reserves (IUCN category) in Serbia and 6 more which are in the procedure of receiving the status of a Nature reserve. They are grouped into two groups: Strict Nature Reserves and Special Nature Reserves.</p> <p>There are also 23 Nature parks and Landscapes of Outstanding Features (IUCN Category) and 8 more which are in the procedure of receiving the status of a Nature Park or a Landscape of outstanding features, 64 natural monuments of geological heritage and 225 monuments of botanical heritage (mostly rare trees).</p> <p>Some of the best-known monuments of geological heritage are: Resavska cave, Đavolja Varoš, Marble cave and Rugova Canyon.</p>
Moldova	<p>Moldova has currently 5 scientific nature reserves, 1 national park, 41 landscape reserves and 21 monuments of landscape architecture.</p>

Source: Own research

The Natura 2000 sites and Natural Protected Areas offer great potential for eco-tourism in the region. There are also a series of natural sites that are transboundary sites which it makes possible to create partnerships and use these resources for a common purpose. This transboundary sites are: Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Austria), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Bosnia and Herzegovina), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Bulgaria), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Croatia), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Czechia), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Germany), Caves of Aggtelek Karst and Slovak Karst (Hungary), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Romania), Caves of Aggtelek Karst and Slovak Karst and Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Slovakia), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Slovenia), and Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (Ukraine).<sup>12</sup>

<sup>12</sup> <https://www.iucn.org/theme/world-heritage/natural-sites>

At the same time, the Danube River is listed among the world's top 10 rivers at risk, mainly due to river engineering, navigation, pollution, and invasive species (Wong, Williams, Pittcock, Collier, & Schelle, 2007).

To combat this, according Interreg Danube Program Strategy, there are a few challenges and needs for cooperation in this region:

- There is a need in for increasing the governance and coordination capacities for the preservation and valorization of the cultural and natural resources.
- There is a need to promote Danube as the linkage of different touristic products increasing the touristic significance of the entire region.
- There is a need to protect the vivid landscape of regional cultural assets and to underpin their linkages as tools for cooperation and the development of an identity for the Danube Region.

For this challenges, Danube Region Strategy propose some targets for the Priority Area 6: Biodiversity, landscapes, quality of air and soils, which are:<sup>13</sup>

- Improve management of Natura 2000 sites and other protected areas through transnational cooperation and capacity building.
- Strengthen the efforts to halt the deterioration in the status of species and habitats occurring in the Danube Region and covered by EU nature legislation and to continue the ongoing work and efforts to securing viable populations of Danube sturgeon species.
- Reduce the introductions and spread of Invasive Alien Species (IAS) in the Danube Region.
- Maintain and restore Green and Blue Infrastructure elements through integrated spatial development and conservation planning.
- To improve and/or maintain the soil quality in the Danube Region.
- To decrease air pollution in the Danube Region.

## Cultural heritage and resources

Cultural heritage enriches the individual lives of citizens, is a driving force for the cultural and creative sectors, and plays a role in creating and enhancing Europe's social capital.

The EUSDR regions are also rich in UNESCO World Heritage Sites. There are over 120 properties, 3 sites inscribed on the List of World Heritage in danger, 116 cultural sites and 9 natural sites.<sup>14</sup> The highest number of sites can be found in the Czech Republic, Austria, Bulgaria and Croatia, while in Bosnia, Ukraine and Moldova their number is low. A significant proportion of the areas rich in cultural and natural heritage are having a transnational character, or situated in the vicinity of a state border.<sup>15</sup>

Endangered sites include: Historic Centre of Vienna (Austria), Roşia Montană Mining Landscape (Romania) and Medieval Monuments in Kosovo (Serbia).

<sup>13</sup> <https://nature.danube-region.eu/targets-of-the-priority-area-6/>

<sup>14</sup> <http://whc.unesco.org/en/list/>

<sup>15</sup> Analysis of territorial challenges, needs and potentials of the Danube Region and strategic options in view of the Transnational cooperation for the period 2021-2027

Stakeholders across the Danube Region developed joint measures to protect and restore the quality of often invaluable natural assets forming a wide variety of interrelated and interdependent ecosystems.

The cultural and natural diversity can also represent a high potential for development, the coexistence of numerous ethnic, language and religious groups creating the premises for easier communication and more intensive cooperation. The specific of multiculturalism represents a source for developing the cultural creativity and to boost the creative industries, which can lead to more and better jobs both in culture-related fields and in tourism as well, thus increasing the attractiveness of the region and offering the potential to revitalize urban and rural areas and promote sustainable tourism.

Heritage<sup>16</sup> represents the accumulated knowledge, practices, skills, and institutions on which we draw to bring the past into the present and to stimulate reflection on the future. It forms the collective cultural memory of a society, acting as a source of artistic and scientific inspiration, creativity and enterprise for current and future generations.

According to UNESCO, the importance of intangible cultural heritage is not the cultural manifestation itself but rather the wealth of knowledge and skills that is transmitted. The social and economic value of this transmission of knowledge is relevant for minority groups and for mainstream social groups within a State, and is as important for developing States as for developed ones.

UNESCO's 2003 Convention for the Safeguarding of the Intangible Cultural Heritage indicates five broad 'domains' in which, among others, intangible cultural heritage is manifested:<sup>17</sup>

- Oral traditions and expressions, including language as a vehicle of the intangible cultural heritage.
- Performing arts.
- Social practices, rituals and festive events.
- Knowledge and practices concerning nature and the universe.
- Traditional craftsmanship.

One of the most important projects on promoting intangible heritage in EUSDR region is the "Guidebook on Hidden Heritage Resourcing for Tourism" and the research on "Hidden Heritage Hot Spots" along the Danube, made with the Danube Culture Platform - Creative Space for the 21st Century project. The aim of the Danube Culture Platform project is to highlight cultural heritage and find new forms of interpretation for an audience of the 21st century.<sup>18</sup>

The hidden heritage hot spots gathered within this project so far led to a list of 15 hidden Danube heritage themes, that are suitable as starting points for the development of further activities<sup>19</sup>. The multi-layered past of the Danube region is a fascinating realm of discovery. Much of its history remains hidden or has been forgotten. Hidden heritage is the point of departure for contemporary approaches. The pilot projects of the Danube Culture Platform are a visible testimony of the historic

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<sup>16</sup> The UNESCO World Heritage Centre defines heritage as *our legacy from the past, what we live with today, and what we pass on to future generations. Our cultural and natural heritage are irreplaceable sources of life and inspiration*

<sup>17</sup> [https://www.interreg-](https://www.interreg-danube.eu/uploads/media/approved_project_output/0001/30/7e038f92c279fb2ddf04a17b634ac5f504b262fc.pdf)

[danube.eu/uploads/media/approved\\_project\\_output/0001/30/7e038f92c279fb2ddf04a17b634ac5f504b262fc.pdf](https://www.interreg-danube.eu/uploads/media/approved_project_output/0001/30/7e038f92c279fb2ddf04a17b634ac5f504b262fc.pdf)

<sup>18</sup> [https://ec.europa.eu/regional\\_policy/en/projects/Hungary/bringing-the-danube-regions-hidden-histories-and-culture-to-life](https://ec.europa.eu/regional_policy/en/projects/Hungary/bringing-the-danube-regions-hidden-histories-and-culture-to-life)

<sup>19</sup> Hidden Danube Heritage Themes

memory of the Danube region and provide sustainable impulses for a new, contemporary interpretation of hidden heritage.

The pilot projects made so far are:

- the “Stereoscopes”, with stereoscopic images of hidden Roman heritage in Upper Austria (AT).
- the educational mobile app “Invisible Sopiana”, related to hidden heritage in Pécs (HU).
- the computer modelling and 3D virtual reconstruction of the Kaleto defensive system, the synagogue and the Baba Vida fortress “Discover Hidden Heritage in Vidin” (BG).
- the virtual reconstruction of the “Golubac Fortress” (RS).

Furthermore, there was developed a series of artistic projects which aimed to highlight several intangible elements of heritage that this area has - *Golubac Fortress / Tabula Traiana* (RS), *Danube Art Lab Regensburg* (DE), *Studio DAHD* (AT, DE, BG, RS), *Danube Art Festival Ada Kaleh* (RO) and *Tagging Hidden Architecture Jewels* (AT).

The European Framework for Action on Cultural Heritage also includes a number of specific actions that are relevant for cities and regions. The proposed European initiatives focus specifically on regenerating cities and regions through cultural heritage, promoting adaptive re-use of heritage buildings as well as balancing access to cultural heritage with sustainable cultural tourism and natural heritage.<sup>20</sup>

Cultural heritage, in all its components, tangible and intangible, is a key factor for the refocusing of our societies based on dialogue between cultures, respect for identities and diversity, and a feeling of belonging to a community of values.

Cultural heritage can also play a key role as a means of building, negotiating and asserting one's identity. Thus, cultural heritage is a powerful factor in social and economic development through the activities it generates and the policies which underpin it. It can help achieve objectives in other sectors. It constitutes an invaluable resource in the fields of education, employment, tourism and sustainable development.<sup>21</sup>

For all its impressive financial impact, culture (and especially its subsets of arts and heritage) have a value in terms of human expression that transcends the economic benefit accruing from it.

**Cultural Routes of the Council of Europe** have been designated and certified in the EUSDR territory in order to better connect the cultural and natural heritage sites and tourist attractions of Europe. They can be considered tools that support the transnational management of tourism products and services, and hence they are relevant for enhancing touristic valorisation of joint heritage. The density of the network varies, however, at the EUSDR level, with Croatia, Germany, Slovenia being well connected within the macro-region, while large areas of Bulgaria, Bosnia and Herzegovina and Moldova are excluded from the network and there are no routes covering Ukraine (as of 2019). Also, there is no Cultural Route involving all countries within the EUSDR territory, which might be an interesting consideration for strengthening transnational cooperation in the future. The following Cultural Routes are relevant for the EUSDR territory:

<sup>20</sup> <https://culture.ec.europa.eu/policies/culture-in-cities-and-regions>

<sup>21</sup> Recommendation of the Committee of Ministers to member States on the European Cultural Heritage Strategy for the 21st century

- ATRIUM - Architecture of Totalitarian Regimes of the 20th Century in Europe's Urban Memory (Romania, Bulgaria, Croatia);
- Destination Napoleon (Germany, Czech Republic, Croatia);
- European Cemeteries Route (Austria, Bosnia and Herzegovina, Croatia, Germany, Romania, Serbia, Slovenia);
- European Mozart Ways (Austria, Czech Republic, Germany, Slovakia);
- European Route of Cistercian Abbeys (Czech Republic, Germany);
- European Route of Historic Thermal Towns (Croatia, Czech Republic, Germany, Hungary);
- European Route of Industrial Heritage (Austria, Bulgaria, Croatia, Czech Republic, Germany, Hungary, Serbia, Ukraine);
- European Route of Jewish Heritage (Austria, Bosnia and Herzegovina, Czech Republic, Germany, Romania, Slovakia, Slovenia);
- Routes of Reformation (Austria, Czech Republic, Germany, Hungary, Slovenia);
- Impressionisms Routes (Croatia, Germany, Slovenia);
- Iron Curtain Trail (Austria, Bulgaria, Croatia, Czech Republic, Germany, Hungary, Romania, Serbia, Slovakia, Slovenia);
- Iter Vitis Route (Bulgaria, Croatia, Hungary, Montenegro, Moldova, Romania, Serbia, Slovenia);
- Liberation Route Europe (Czech Republic, Germany);
- Réseau Art Nouveau Network (Austria, Germany, Hungary, Romania, Serbia, Slovenia)
- Roman Emperors and Danube Wine Route (Bulgaria, Croatia, Hungary, Romania, Serbia);
- Routes of the Olive Tree (Croatia, Slovenia);
- Saint Martin of Tours Route (Croatia, Germany, Hungary, Slovakia, Slovenia);
- TRANSROMANICA - The Romanesque Routes of European Heritage (Austria, Germany, Romania, Serbia, Slovakia);
- Via Habsburg (Austria, Germany).

Based on the list above, the territorial distribution shows that most Cultural Routes cross Germany (12), followed by Croatia (9), Romania (7) and Austria (6). Czech Republic, Hungary and Slovenia (5) have medium number of routes, while Serbia (4), Slovak Republic (3), Bulgaria (2), Montenegro (1), Moldova (1) as well as Bosnia and Herzegovina (1) have limited number of Cultural Routes.

In terms of thematic cooperation, most popular themes are: viniculture (8), industrial heritage (8), Jewish heritage (7), cemeteries (7), Art Nouveau architecture (6), Roman heritage (5), Romanesque architecture (5), Saint Martin (5), Reformation (5), thermal towns (4), and Mozart (4).

According to the Danube Transnational Cooperation Programme Territorial Analysis<sup>22</sup>, some recommendations should be considered in order to strengthen the management of tourism related to the Cultural Routes:

- cultural tourism policies, recommendations and guidelines drafted in the framework of Routes4U are needed to be implemented.
- the management structures of successful Cultural Routes in the Danube Region should be analysed to compile and share best practices on management structures and implementation of activities in the Danube macro-region.

<sup>22</sup> Analysis of territorial challenges, needs and potentials of the Danube region and strategic options in view of the transnational cooperation for the period 2021-2027

- The Roman Emperors and Danube Wine Route could serve as an example of how to prepare a Cultural Route in line with the needs and within the geographic area of macro-region.
- Other recommendations: wide stakeholder involvement at the local level for creating cultural tourism products, well-established networks of key stakeholders at the destination level are the guarantee for developing networks and co-operation among the stakeholders along the Cultural Routes.

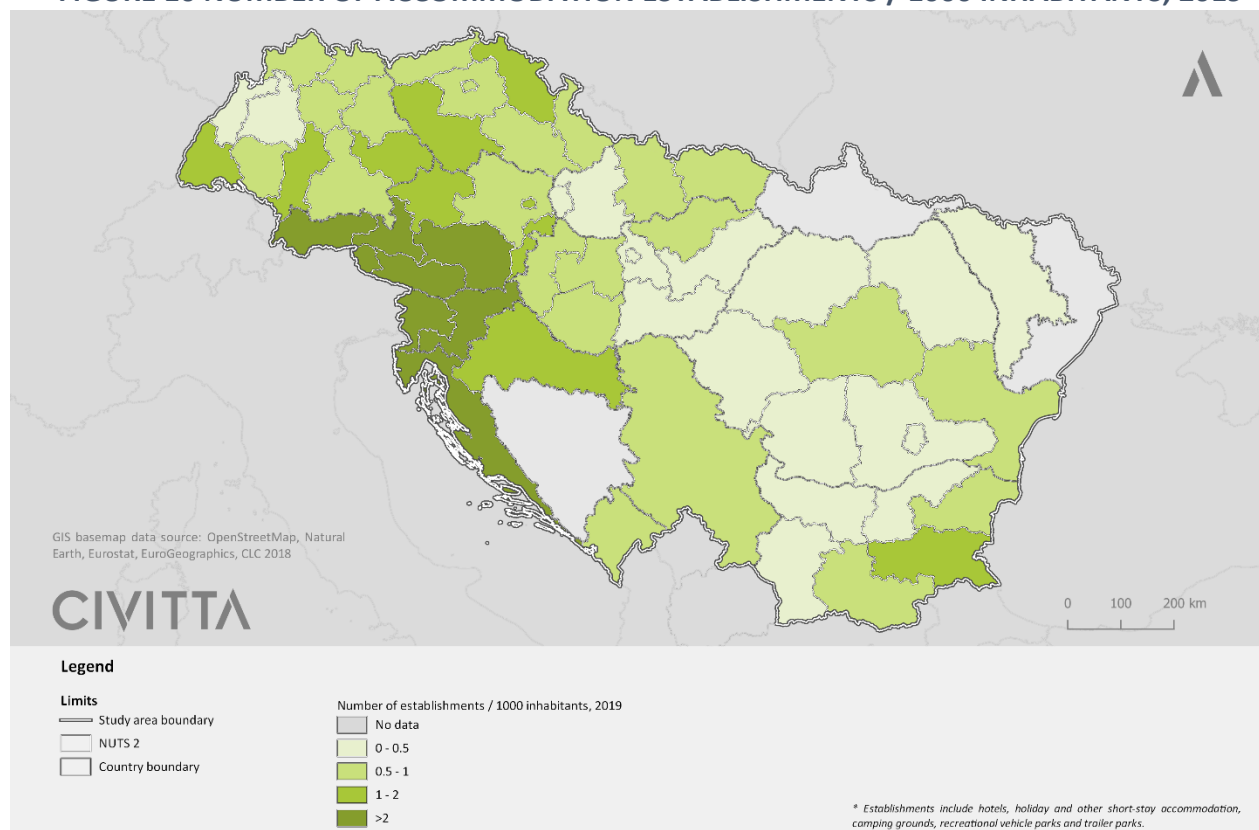
## Touristic performance

### Touristic infrastructure

Touristic infrastructure will be assessed in this section using three main indicators: number (density) of accommodation units/establishments, accommodation capacity, reflected in the number of available bedplaces, and the net occupancy rate of the available capacity.

The number of establishments, as well as the number of bedplaces show a similar spatial distribution across the EUSDR territory, pointing towards large inequalities and differences across the regions. Most accommodation capacities are concentrated along the Adriatic Coast in Croatia (over 79 establishments per 1000 inhabitants), in the Austrian Alps (Tirol, Salzburg, Carinthia), as well as in Slovenia. A moderate number of units is found on the Black Sea coast in Burgas region (BG).

**FIGURE 10 NUMBER OF ACCOMMODATION ESTABLISHMENTS / 1000 INHABITANTS, 2019**

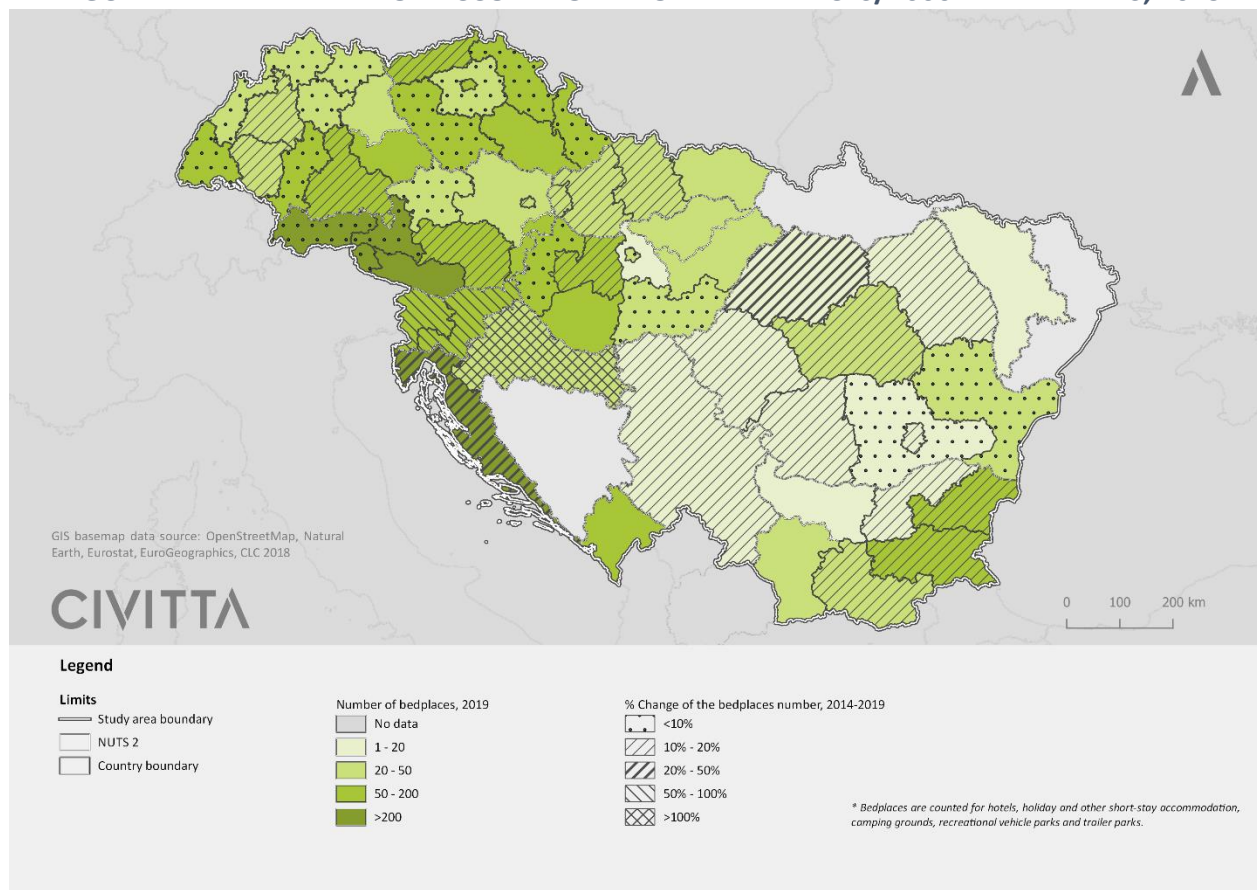


Source: Own elaboration based on Eurostat data

In terms of bedplaces / 1000 inhabitants, the spatial distribution depicts a high density of available capacity in the 3 major tourist hotspots of the macro-region: the Adriatic Coast (Croatia - over 780 bedplaces/1000 inhabitants), the Alps (especially in Austria - Tirol, Salzburg, Carinthia - 250-350 bedplaces / 1000 inhabitants) and the Black Sea Coast in Bulgaria (around 136 bedplaces / 1000

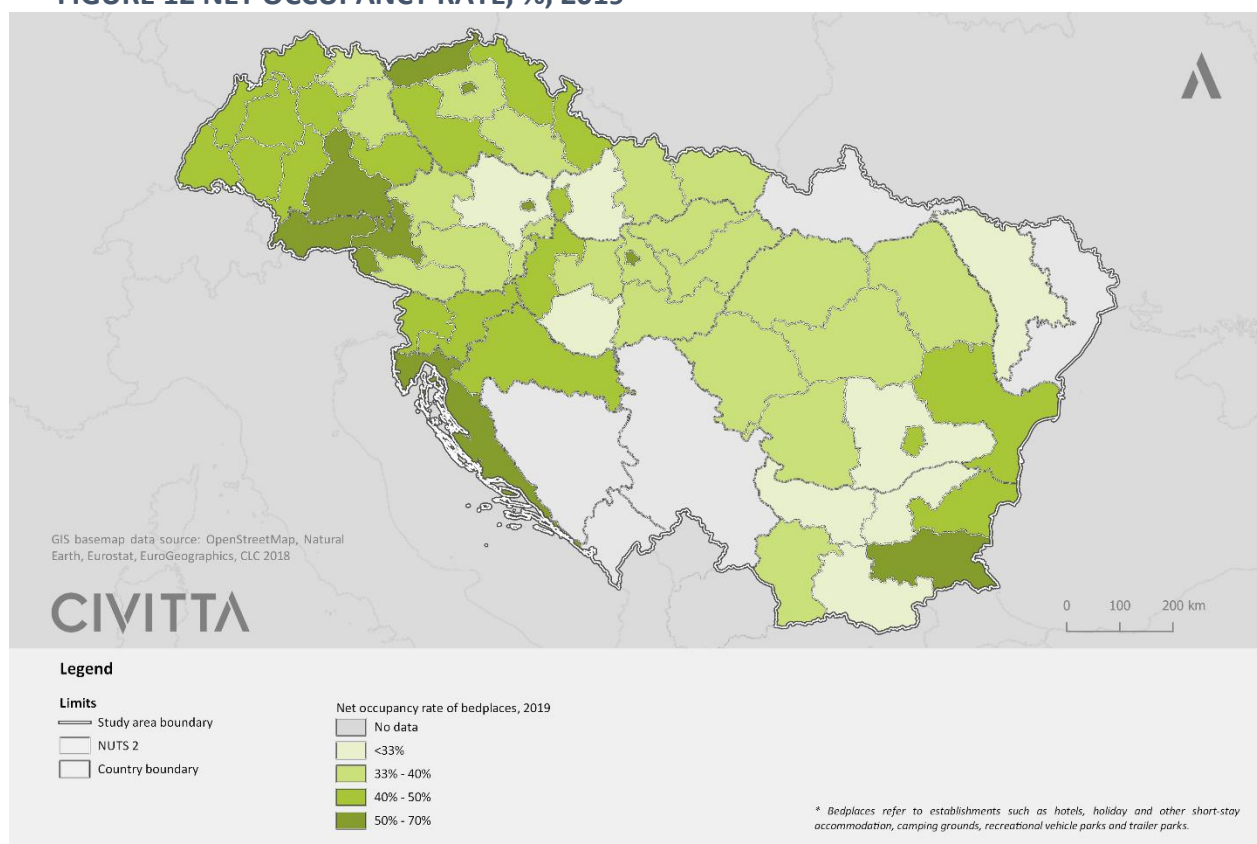
inhabitants). Two other regions with high values are Jihozápad (CZ) and Zahodna Slovenija (SI), the latter showing one of the largest percentage changes compared to 2014 (89.8%).

**FIGURE 11 AVAILABILITY OF ACCOMMODATION – BEDPLACES/1000 INHABITANTS, 2019**



Source: Own elaboration based on Eurostat data

**FIGURE 12 NET OCCUPANCY RATE, %, 2019**



Source: Own elaboration based on Eurostat data

Additionally, similar values of the indicator are observed in cross-border areas, either large values (Hungary-Czech Rep., Hungary - Austria) or small values (Romania-Hungary, Romania-Bulgaria, except for the coastal regions). This asks for better coordination and increased cooperation to jointly develop touristic infrastructure.

At the same time, large areas of the territory face not only the problem of a low quantity of accommodation spaces, but also of the quality of the existing infrastructure. This is mostly the case of Romania, Bulgaria and Bosnia and Herzegovina, as outlined in the Territorial Analysis of the Danube Programme<sup>23</sup>.

In terms of the net occupancy rate, the three major touristic hubs lead again, with an average occupancy rate of 50-70%. In addition to the three areas, capital city regions also display high values, especially compared to their neighbouring regions. This is the case since capital cities usually have low seasonality and are attractive to visitors for multiple purposes, including business travel and leisure.

### Touristic circulation

The number of tourists arriving in the EUSDR regions varies greatly in absolute terms, ranging from 18.3 mil. touristic arrivals in Oberbayern region (DE) and 16.9 mil in Coastal Croatia (Dalmatic coast), to 0.2-0.3 mil touristic arrivals in Moldova and Pleven region (BG), some of the poorest regions in the EUSDR territory. With few hotspots in Centru region (RO), Bucharest (RO), Serbia and southern Bulgaria, the territory is rather facing an East/West divide.

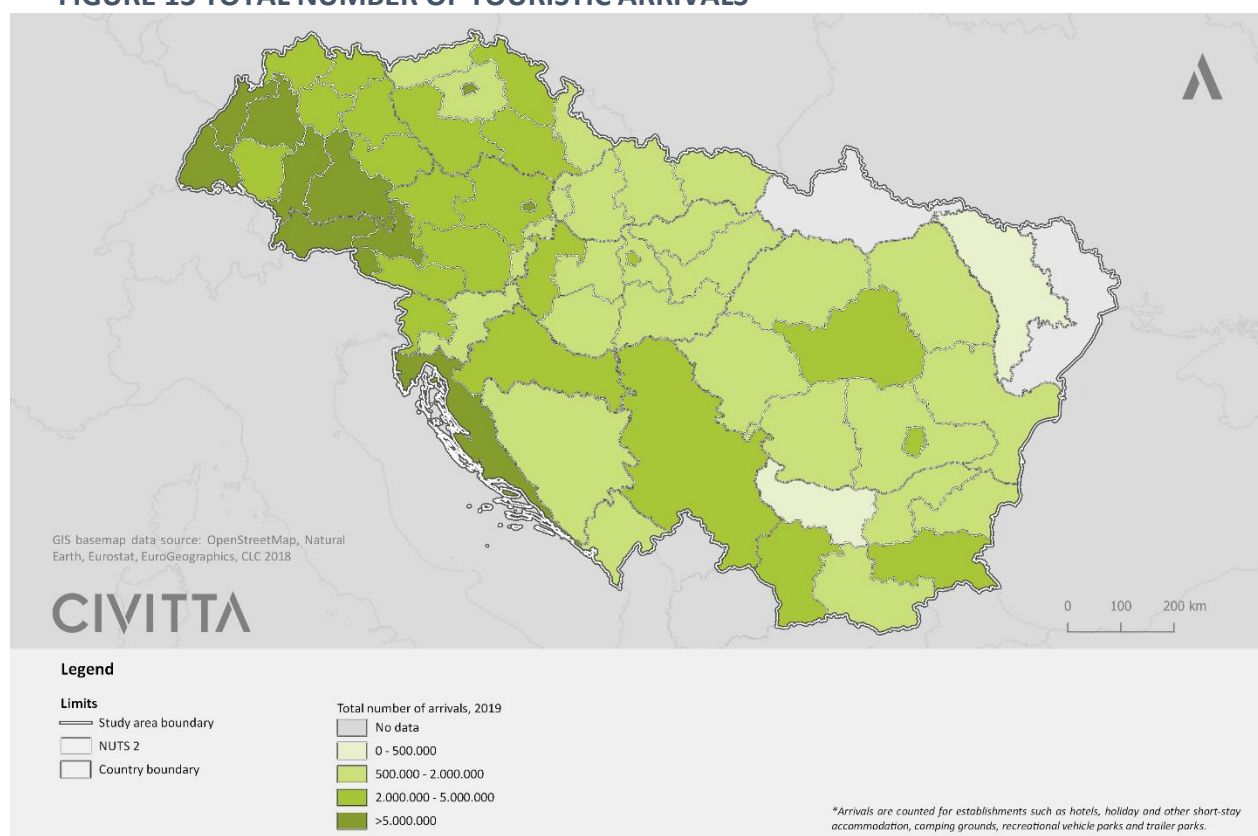
<sup>23</sup> [https://www.cesci-net.eu/docs/DTP\\_3a\\_Final-Territorial-Analysis.pdf](https://www.cesci-net.eu/docs/DTP_3a_Final-Territorial-Analysis.pdf)

Some major touristic hubs are highlighted based on this indicator - the Austrian and German regions in the Western part of the territory, as well as the Dalmatic coast in Croatia, with over 5 mil touristic arrivals. Other touristic hotspots are capital city regions, such as Prague, Wien and Budapest, all characterized by less popular surrounding regions.

The share of foreign tourists is an important indicator regarding the attractiveness and popularity of a region. With the exception of most Romanian regions and a few in Germany, the EUSDR territory is receiving more than 15% of tourists from foreign territories. Imbalances, however, persist, and are mostly related to accessibility, quality of services, seasonality, and cultural heritage and infrastructures influence foreign tourism performance. Easy accessibility to World Heritage Sites drives international tourism demand too.

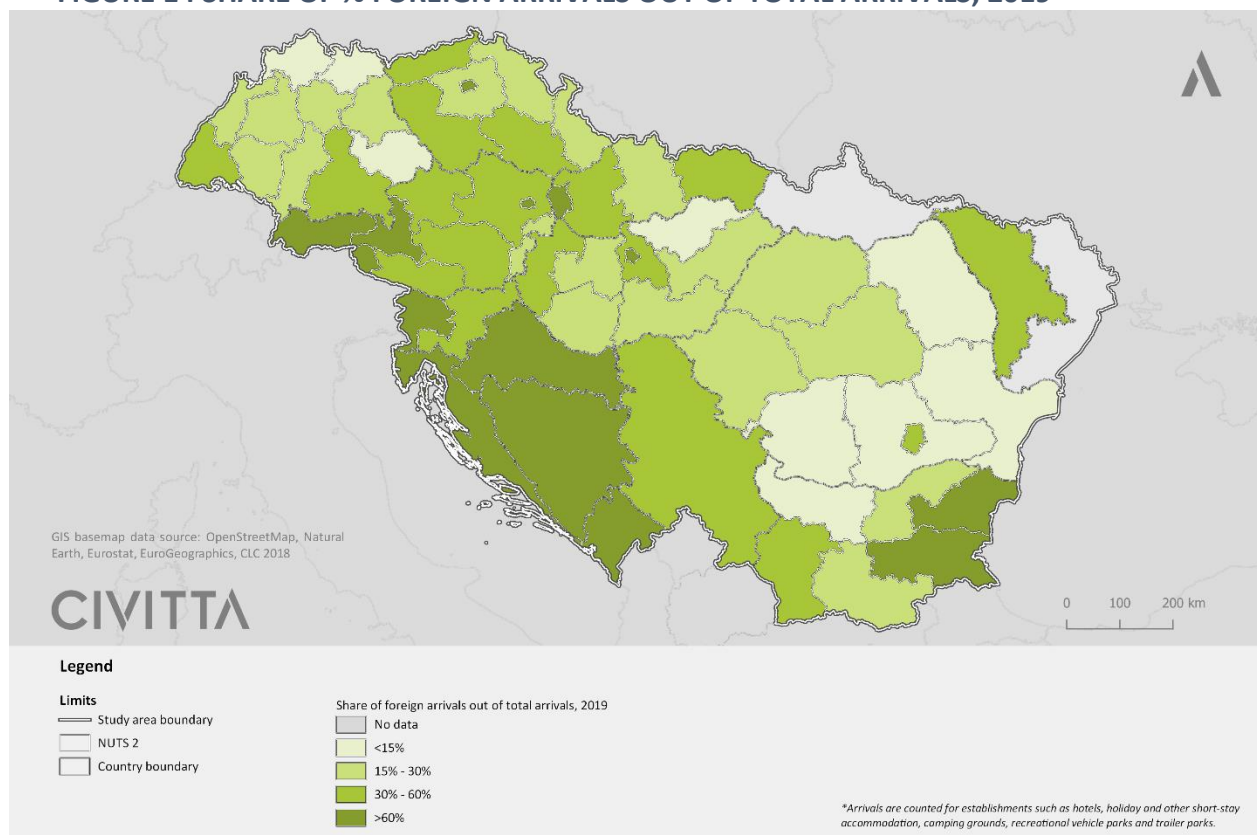
As such, Figure 14 below shows that there are regions which are highly dependent on incoming foreign tourists, with international tourism accounting for over 85% of the total arrivals. This is the case for Coastal Croatia, Montenegro, Tirol (AT) and Budapest (HU). Other regions, mostly on the Bulgarian Black Sea Coast, Continental Croatia, Bosnia and Herzegovina, as well as regions in Austria and Slovenia, also show high dependence on foreign incoming tourists, but to a lower extent (up to 60% of total arrivals). These are the regions which show the greatest vulnerability to travel restrictions and economic shocks, as it was the case with the recent COVID-19 pandemic.

**FIGURE 13 TOTAL NUMBER OF TOURISTIC ARRIVALS**



Source: Own elaboration based on Eurostat data

**FIGURE 14 SHARE OF % FOREIGN ARRIVALS OUT OF TOTAL ARRIVALS, 2019**

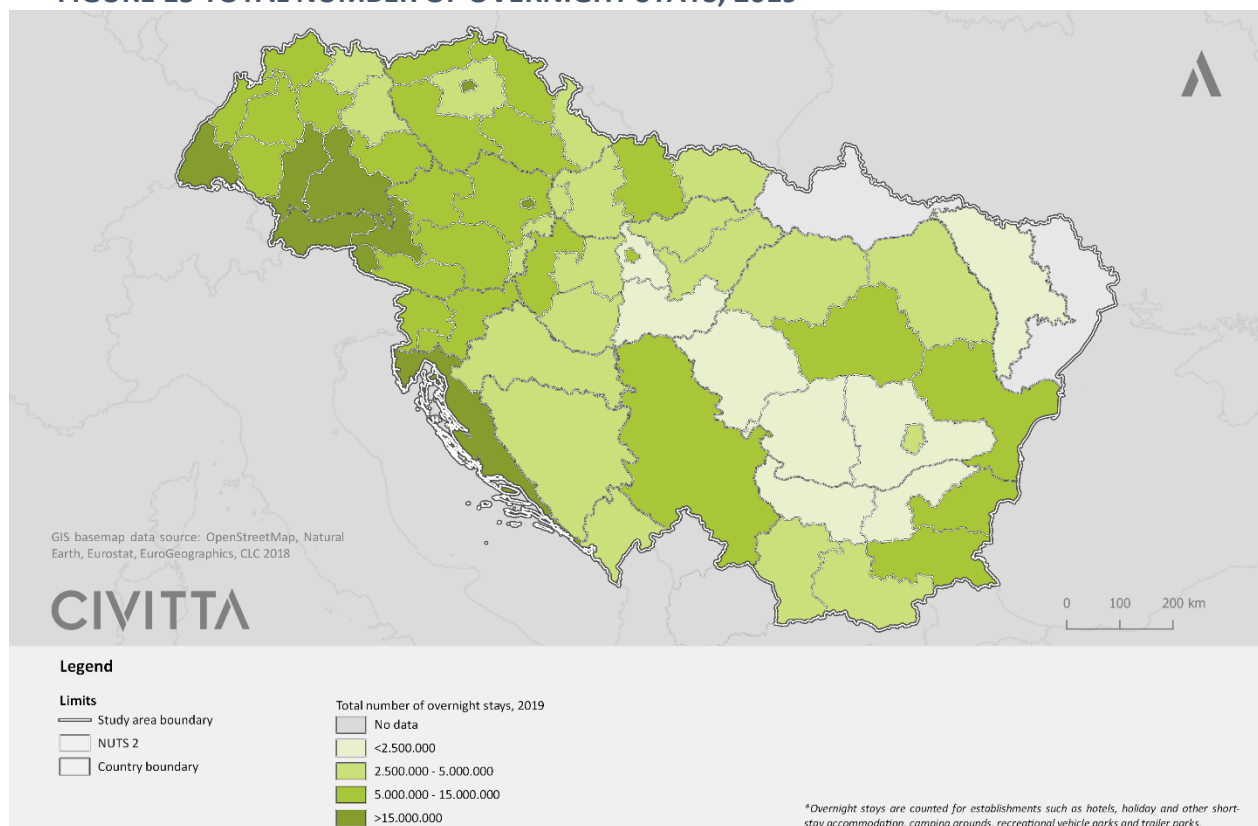


Source: Own elaboration based on Eurostat data

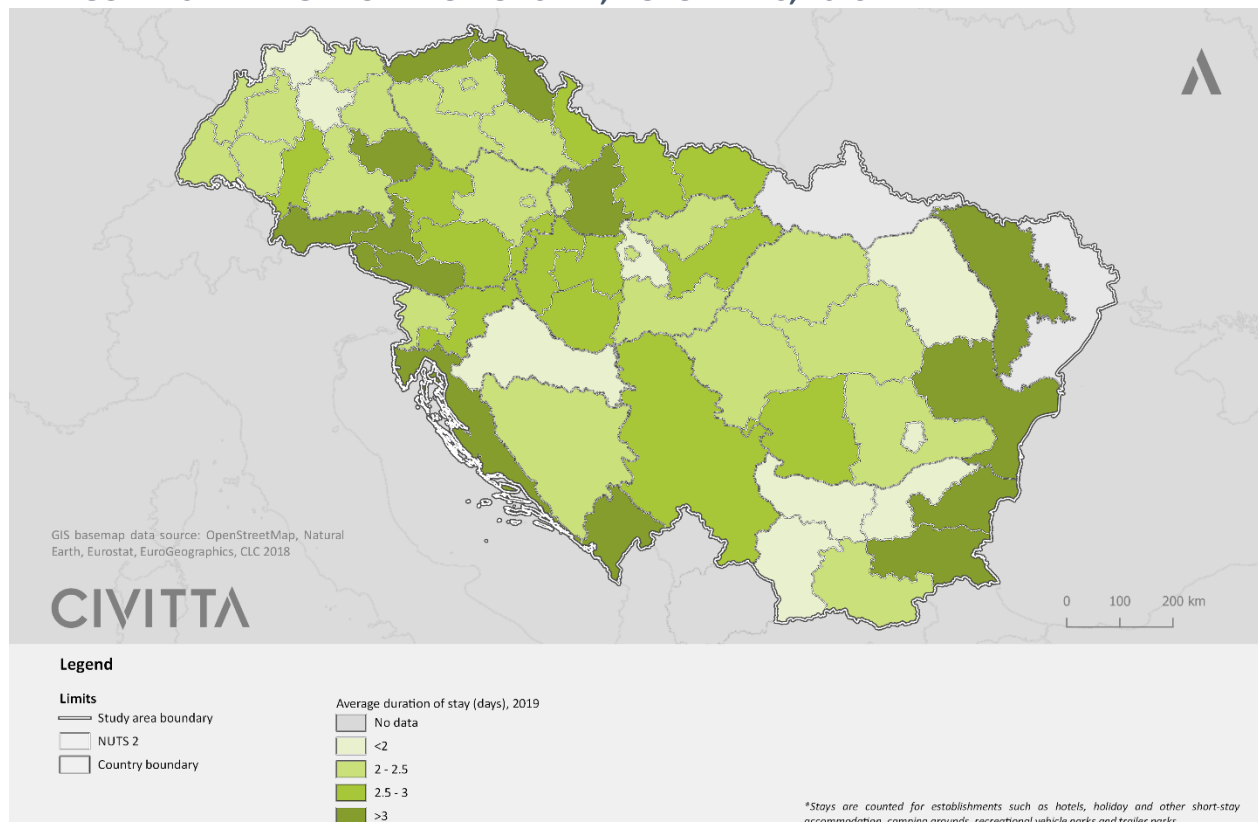
Based on overnight stays, the most popular touristic destinations in the EUSDR territory are regions endowed with natural resources, such as mountain areas (Eastern Alps) and seaside resorts (the Dalmatic coast, the Black Sea coast). Except for the ring Centru region (RO), Black Sea coast and Serbia, there seems to be an east-west divide in terms of overnight stays. Regions in Bosnia and Herzegovina, Slovenia and Romania (North-West) are among the regions which increased their overnight stays the most in the 2014-2019 period (more than 75% increase).

The ratio between the number of overnight stays and arrivals results in the average duration of stay. In the EUSDR territory, this indicator ranges between 1.7 days in Central Bulgaria and Bucharest-Ilfov (RO), and more than 5 days in the coastal areas of Bulgaria and Croatia. Only 26 regions in the territory have an average duration of stay higher than the macro-region average of 2.67 days (roughly the two darker green shades in Figure 16). While Moldova scores low in terms of touristic arrivals, tourists, especially foreign ones, tend to spend more time in the country (around 4.4 days).

**FIGURE 15 TOTAL NUMBER OF OVERNIGHT STAYS, 2019**



**FIGURE 16 AVERAGE DURATION OF STAY, NO. OF DAYS, 2019**



Source: Own elaboration based on Eurostat data

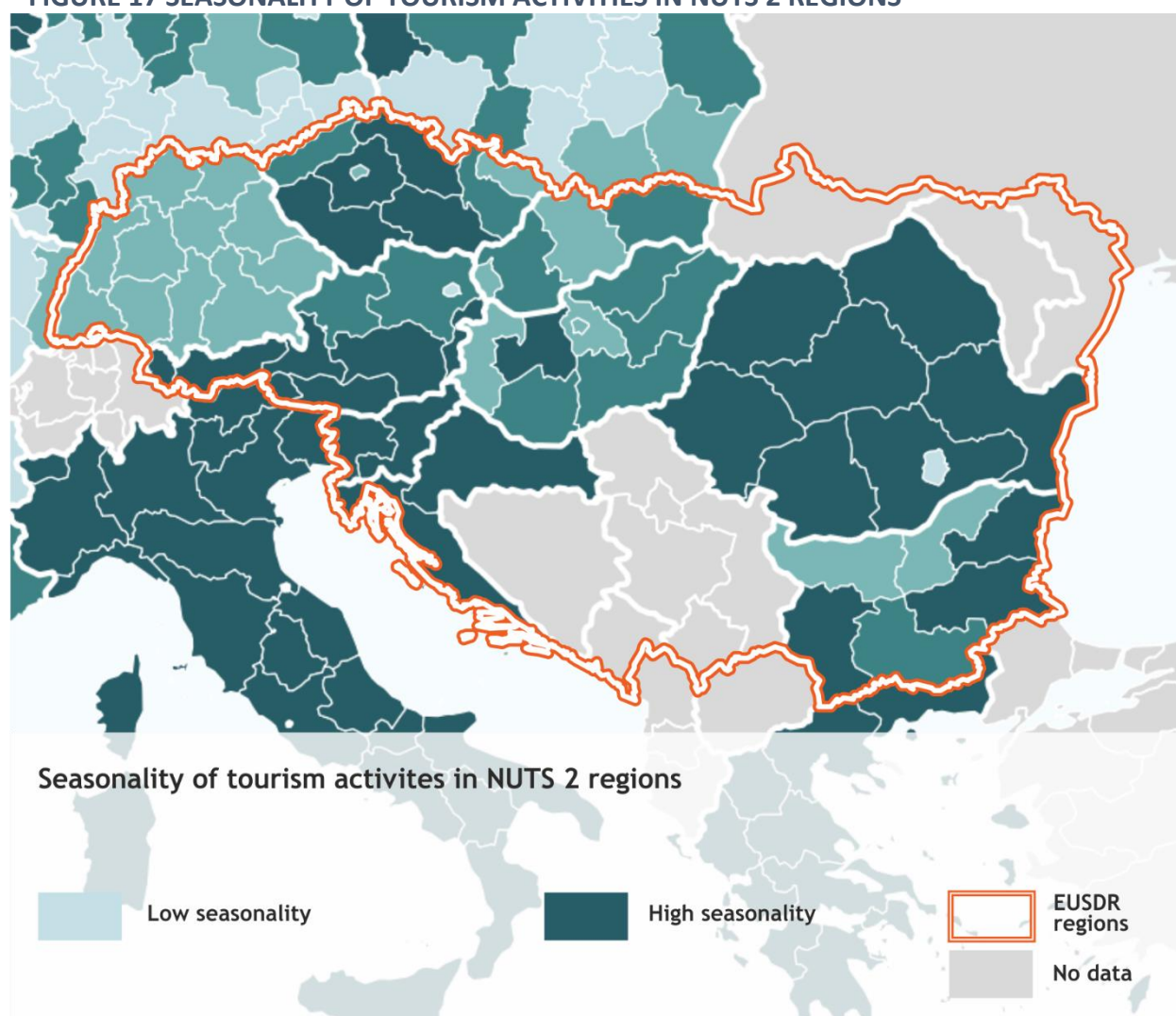
While touristic circulation has been addressed in more detail above, seasonality is an important factor explaining the territorial distribution of touristic demand. As such, summer is the most popular season for most regions, which is explained by two important and correlated factors.

1. Firstly, summer months are when most people traditionally go on holiday, while activities such as education are closed and all the children are in vacations.
2. Secondly, warm weather is very important for holidays in most regions.

The winter season is the most popular in some Alpine regions for winter sports and activities. Autumn seems to be very popular in some inland regions of Romania, Bulgaria and Croatia. Not least, spring is the most popular season in some city-regions such as Bucharest, Budapest or Wien, as well as in areas of Bulgaria and east Croatia.

As we can see from the figure below, areas with the highest concentration of tourism in one season are regions in the Czechia, Romania, Bulgaria, Croatia, Slovenia and around the Alps in Austria. On the other hand, the regions with the lowest seasonality are those in Germany (Baden-Württemberg and Bavaria), several regions in Hungary (along with Budapest) and the Slovakian regions.

**FIGURE 17 SEASONALITY OF TOURISM ACTIVITIES IN NUTS 2 REGIONS**

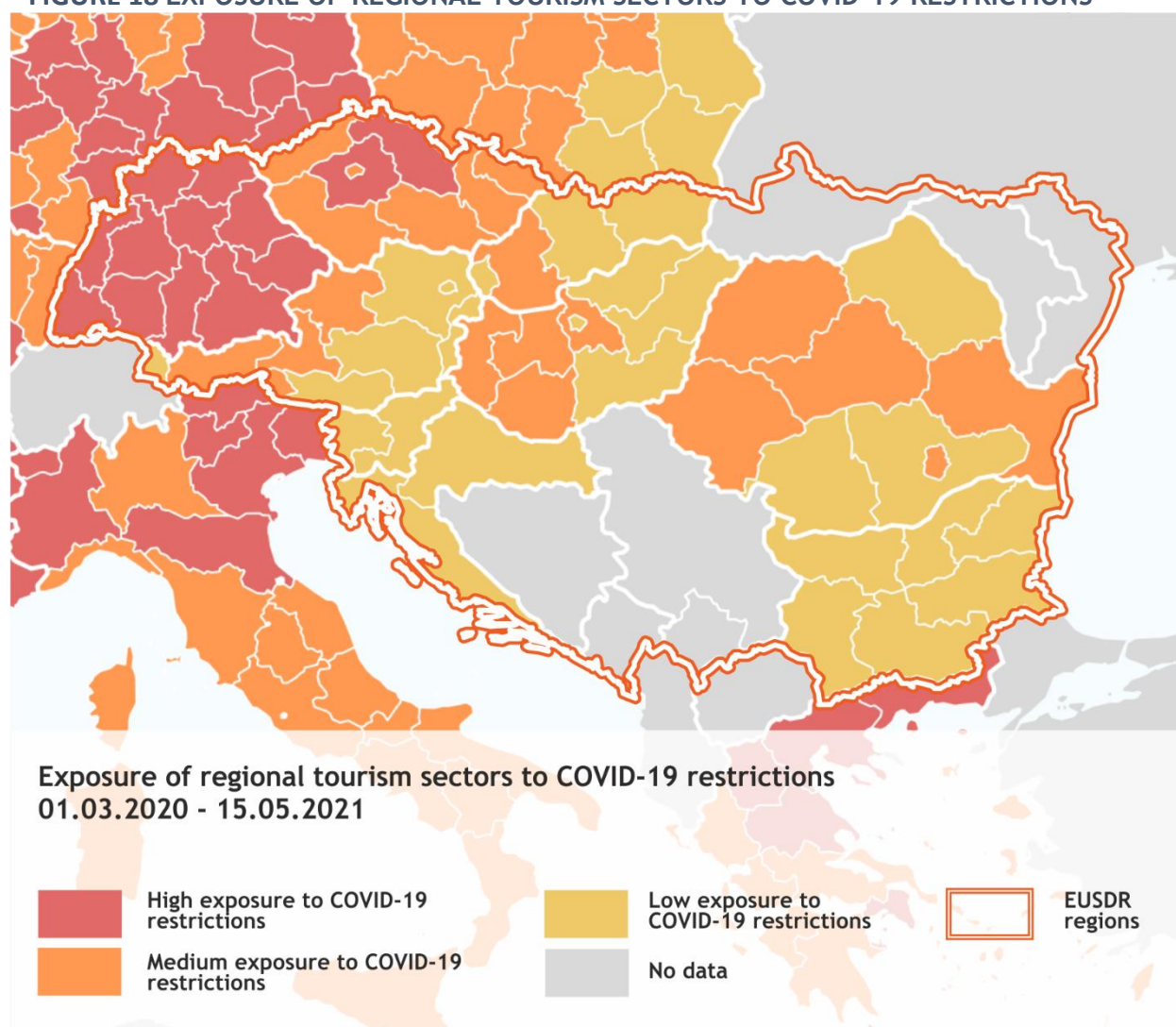


Source: Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

## Resilience of the sectors - COVID impact

To understand the impact of the COVID-19 pandemic on EUSDR regions, it is important to know more about how EU regions engage with tourism. Tourism, arts, cultural and creative industries are among the most adversely affected sectors of the economy in the wake of COVID-19 social distancing measures, travel restrictions and prohibition of large gatherings of people. Although all tourism regions (and EUSDR regions), are heavily impacted by COVID-19, there are considerable variations between them. These are mainly explained by lockdown measures affecting these regions and by their economic structure related to tourism.

**FIGURE 18 EXPOSURE OF REGIONAL TOURISM SECTORS TO COVID-19 RESTRICTIONS**



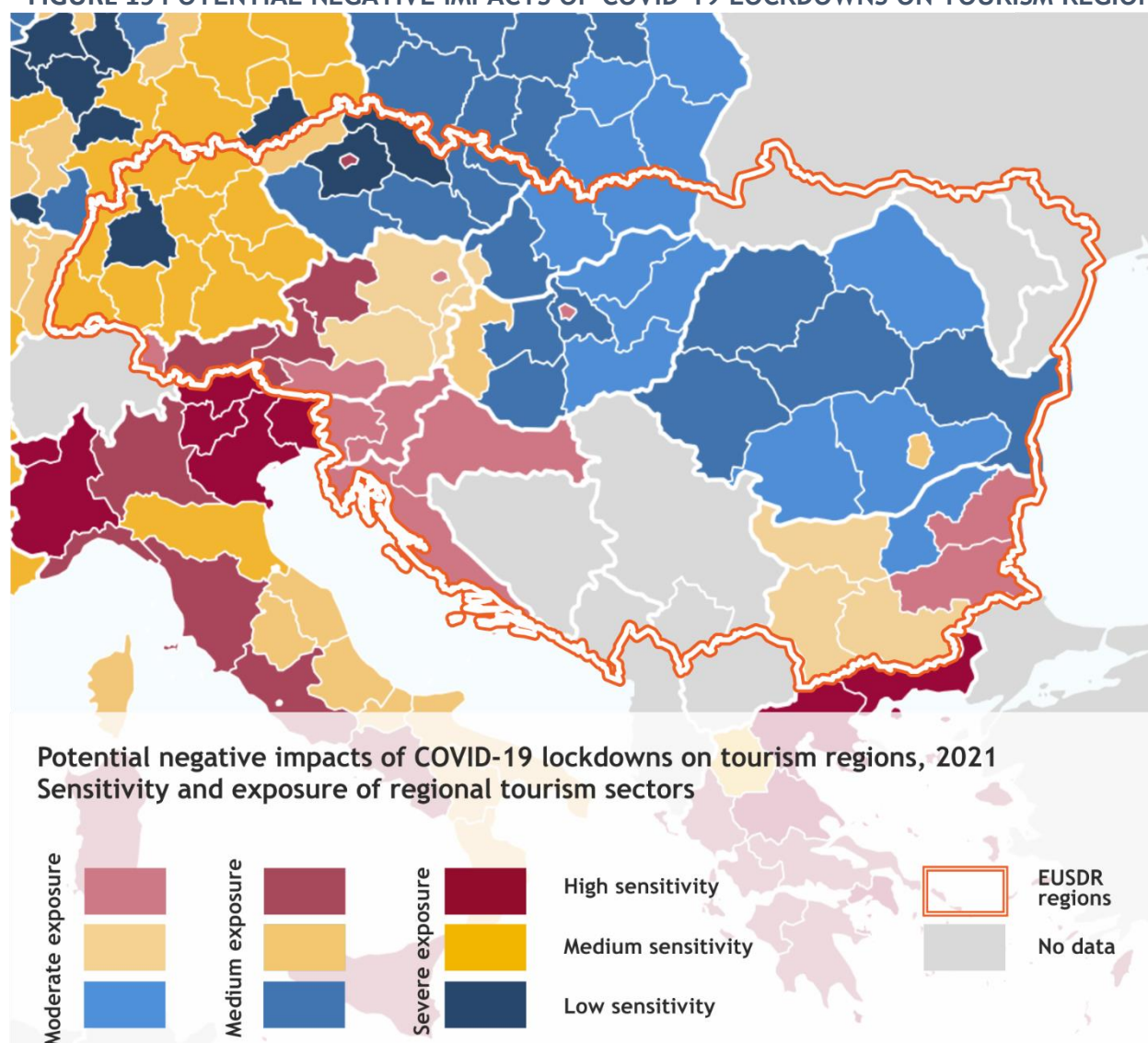
Source: Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

Territorial exposure to COVID-19 policy responses affecting the tourism sector varies mainly with the severity and length of lockdowns and travel restrictions, both international and national. In other words, the exposure describes how much tourism in an area is and/or was subject to restrictions affecting tourism. Although in many countries there are considerable regional - sometimes even local variations of these restrictions - comparable European-wide data is only

available at national level.<sup>24</sup> Also, the COVID-19 pandemic has devastated the tourism and cultural industry and impacted many World Heritage sites, intangible cultural heritage practices, cultural activities and institutions as well. This has jeopardized millions of livelihoods and affected the social and cultural values of communities and increased the vulnerability of many regions that depend on natural and cultural resources.

As can be seen from the previous figure, the highest exposures to pandemic restrictions are in the German states of Baden-Württemberg and Bavaria and several regions in the Czech Republic, as opposed to the south-eastern part, which has a medium to low exposure. This is primarily due to the restrictions imposed by the authorities during the pandemic, as well as the reduced passenger traffic during this period.

**FIGURE 19 POTENTIAL NEGATIVE IMPACTS OF COVID-19 LOCKDOWNS ON TOURISM REGIONS**



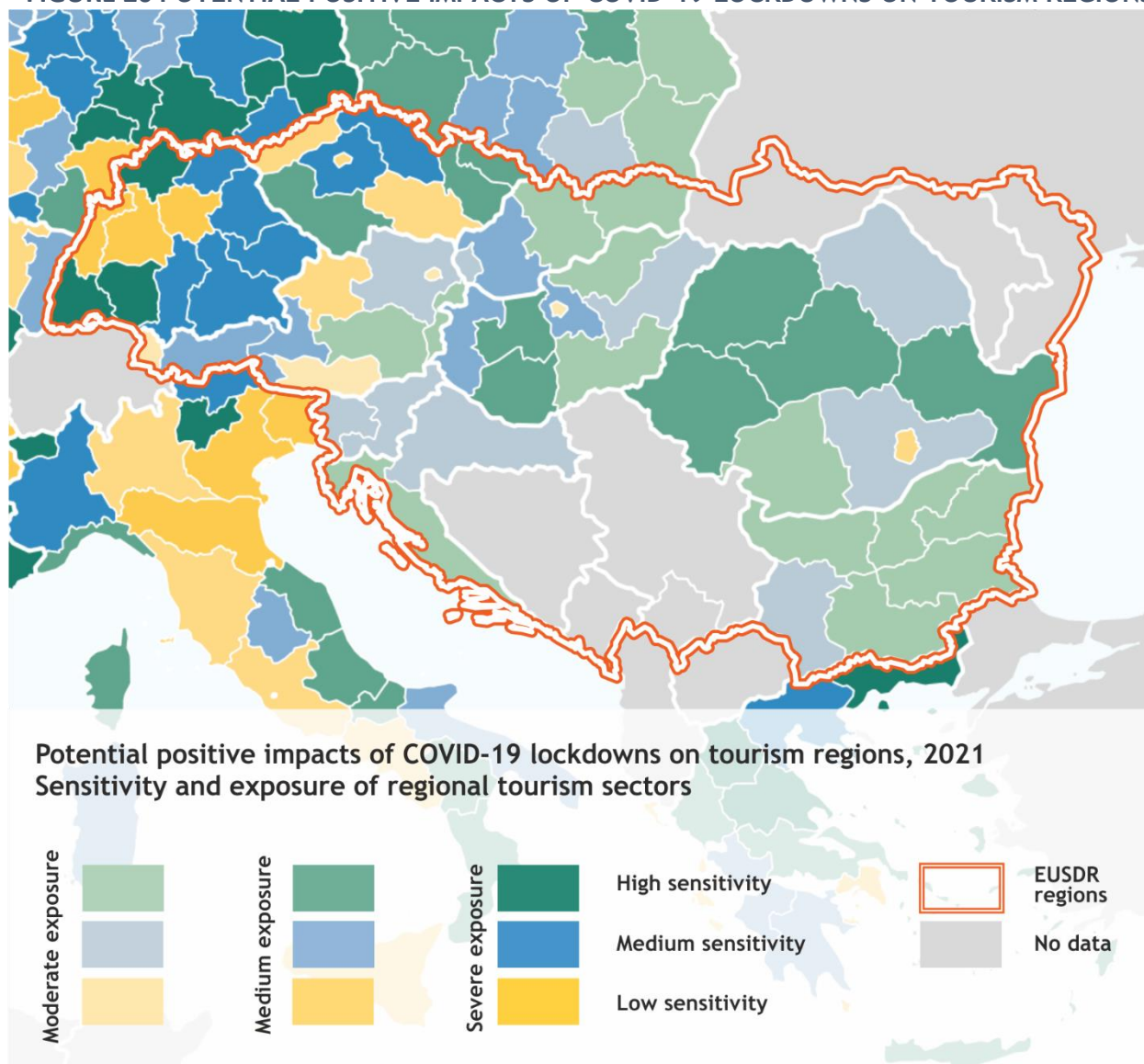
Source: Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

<sup>24</sup> Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

The potentially most badly affected regions by COVID-19, with high sensitivity and high exposure, are a mix of major urban destinations like Italy and Greece. For the EUSDR area, regions such as Croatia, Austria, Slovenia and some Bulgarian counties have a medium exposure and a high sensitivity to negative impact.

The disease outbreaks and pandemics cause global health and economic crises. Pandemics adversely increase mental health issues and affect tourists' behaviour. Many tourists could not follow their usual holiday preferences during the pandemic. Some explored new destinations, often closer to home, with a stronger emphasis on domestic travel and rural destinations, which meant that some regions saw new tourism.<sup>25</sup>

**FIGURE 20 POTENTIAL POSITIVE IMPACTS OF COVID-19 LOCKDOWNS ON TOURISM REGIONS**



Source: Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

<sup>25</sup> Regional impacts of the COVID-19 crisis on the tourist sector, Final Report, 2021

Regarding the potential effects of the COVID-19 pandemic, regions with high sensitivity and medium-high exposure may benefit from the pandemic. Nevertheless, potential positive impacts are by far outweighed by negative impacts, but there are still a few ones that might need attention in future. With COVID-19 bringing global tourism to a standstill, millions of people in quarantine have been seeking out cultural and travel experiences from their homes. Culture has proven indispensable during this period, and the demand for virtual access to museums, heritage sites, theatres and performances has reached unprecedented levels.

Sud-Vest Oltenia region in Romania or the southern part of Hungary, the two Eastern regions of Slovakia and the most regions in Bulgaria, are the regions where the tourism sector can and should benefit from the pandemic. These are areas which are home to key players in the tourism sector and have good governance as well as access to financial resources to invest in innovation and new tourism products.

Despite all the challenges, the tourism and culture sectors are facing an opportunity to create new partnerships and collaboration. They are bound to jointly reinvent and diversify the offer, attract new audiences, develop new skills and support the world's transition to the new conditions.

## Preliminary Conclusions

- Performing the territorial analysis highlighted important limitations with respect to data gaps between EU and non-EU countries and regions. This has the potential to impact joint efforts in the monitoring and data-driven decisions, however it opens new ways for transnational cooperation to support joint data collection efforts.
- The territory covered by the EUSDR is highly endowed with natural cultural and touristic resources, including protected areas, Natura 2000 sites and UNESCO World Heritage Sites, as well as with monuments and attractions of regional or national importance. Many such resources have a transnational character due to their location (i.e. close to state borders) and thus are being jointly exploited and used by multiple states and regions;
- Tourism is one of the main economic sectors in most of the states and regions covered by the EUSDR, given the high employment multiplier. However, the direct contribution of the sector to GDP is relatively low, pointing to the need for increased value added. Digitalisation and other emerging trends can support a better valorisation of the sector.
- The contribution of tourism to the business ecosystem and the entrepreneurial capacity is unequally distributed, yet jointly addressing business creation and business support together in line with strategic priorities should be beneficial to increase overall economic activity of the regions.
- The territory is still facing inequalities in terms of the accommodation capacity, with poor quality infrastructure and/or limited accessibility being a major issue in Romania, Bulgaria and Bosnia and Herzegovina.
- Also, large inequalities are recorded in terms of attractiveness, reflected in the overnight stays, average duration of stay and inflows of foreign tourists, with Eastern Alps and seaside resorts in Croatia and Bulgaria being among the most popular destinations for tourists.