



# **D.1.3.3 Policy recommendations for sustainable tourism community development with a transnational context**

# MYSTICAL DANUBE

**GREEN AND MYSTICAL DANUBE  
STORYTELLING ROUTE – Transnational  
valorisation of natural and intangible cultural  
heritage for socio-economic development of  
rural areas in the Danube region**

**Specific objective 1:**

**Strategy for valorisation of natural and intangible cultural  
heritage in rural, less visited areas**

**Activity 1.3**

**Creating a Strategy on how to valorise mapped natural and  
associated intangible cultural heritage as a touristic resource for  
the creation of sustainable community tourism services and  
products**

**Deliverable 1.3.3**

**D.1.3.3 Policy recommendations for sustainable tourism  
community development with a transnational context**

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# 1. Introduction

Based on a comprehensive overview and data/input collection from the project partners in **Slovenia, Croatia, Serbia, Bosnia and Hercegovina, Slovak Republic, Montenegro, Romania, Hungary and Bulgaria** CEEweb for Biodiversity (PP8) prepared this deliverable namely D.1.3.3 Policy recommendations for sustainable tourism community development with a transnational context.

Qualitative and quantitative data have been gathered from project partners who have detailed knowledge and access to national sources. Different input from key stakeholders, case studies (being collected as part of Activity 1.2, D.1.2.1 – “*Report on examples of best practices in sustainable community tourism development*”), Local Action Plans (D. 2.3.1 Report on workshops for the development and implementation of Action plans in each Pilot site) and in the open-source database were analysed.

The data collection process began with the identification of **stakeholders, key information sources, including national policy documents, tourism statistics, and reports from international organizations.**

Additionally, regional strategy papers, such as those from macro-regional initiatives like the Danube Region Strategy, were reviewed to capture broader policy frameworks and cross-border collaborations.

A **standardized template was developed** for the data collection process, ensuring uniformity in capturing relevant details. This included information on stakeholder roles, funding mechanisms, policy frameworks, and specific challenges or opportunities in each country. The collected data was then cross-referenced and validated for accuracy before being synthesized into a comprehensive analysis.

## 2. Executive summary

This analysis brings together evidence from multiple pilot action plans and stakeholder assessments across the Danube Region to identify common patterns, systemic gaps, and policy priorities in the fields of sustainable tourism, cultural and natural heritage, and regional development. The findings reveal a consistent regional picture: participating territories are rich in natural and cultural assets and strongly aligned with EU sustainability objectives, yet they remain constrained by low institutional and market maturity.

Across the analysed pilot sites, the dominant development pattern can be described as “high potential – low maturity”. Regions demonstrate strong foundations for sustainable, community-based tourism – such as biodiversity, cultural heritage, and active local communities – but face persistent barriers in translating these assets into structured, market-ready tourism systems. Tourism development is often supply-driven, with limited focus on product development, pricing, and market access, resulting in modest economic impact despite significant potential.

The stakeholder analysis further explains these challenges by highlighting a structurally imbalanced governance system. Decision-making is concentrated within public institutions, while private sector actors – despite their central role in service delivery – have limited influence. Civil society and local communities are actively engaged but lack decision-making power, and coordination across governance levels remains weak and fragmented. In addition, the absence of strong intermediary actors, such as fully operational destination management organisations or cluster-based structures, limits cooperation and the development of integrated tourism value chains.

These findings point to a fundamental issue: the key constraint in the region is not the lack of strategies or stakeholders, but the absence of coordinated, market-oriented destination systems with sufficient implementation capacity. As a result, many local plans risk remaining under-implemented, and the long-term impact of investments – including those supported by Interreg – remains limited.

Addressing these challenges requires a shift in policy approach. Next to focusing on pilot actions and strategy development, future interventions should also prioritise system-building, including the establishment of clear governance frameworks, strengthening coordination mechanisms, and embedding intermediary structures capable of linking policy, market, and community actors. Equally important is the need to enhance market orientation and product development capacity, enabling regions to move from asset-based thinking to the creation of integrated, bookable tourism experiences.

In this context, Interreg programmes have a key role to play in supporting the transition from experimentation to implementation. This includes fostering multi-level governance models, strengthening stakeholder integration, enabling capacity building, and supporting the scaling and replication of successful approaches. By aligning funding instruments with these priorities, Interreg can also contribute to the development of resilient, competitive, and sustainable destination systems across the Danube Region.

In essence, the region’s challenge is not to create new tourism potential, but to unlock existing potential through better governance, stronger coordination, and deeper market integration.

# 3. Methodological overview

## Stakeholder mapping and data collection

The aim of the stakeholder mapping in Mystical Danube project's policy analysis process was to identify and understand the roles, relationships, and influence of stakeholders involved in policies and initiatives related to heritage, tourism, and regional development in the Danube Region Countries

The first step in the research was the of the stakeholders and identification of nationally relevant “key stakeholders”. It started with defining stakeholder categories and then categorise them clearly. Predefined categories included government, tourism-business sector, educational sector, transport sector, NGOs, funding agencies, international bodies and other.

For a structured overview of the national stakeholders their level of influence and level of interest was defined. For easier overview and visual experience so-called stakeholder matrix was made. It is typically presented as a two-by-two grid, and it divides stakeholders into four quadrants: High Influence, High Interest (key players to engage and involve closely); High Influence, Low Interest (stakeholders to keep satisfied and informed); Low Influence, High Interest (groups to involve and support through participation opportunities); and Low Influence, Low Interest (stakeholders to monitor with minimal engagement). This framework helped prioritize resources and engagement strategies, ensuring effective collaboration and maximizing the impact of projects or policies. During the Partners' meeting in Zadar on the 15<sup>th</sup> of May 2024 projects partners were asked to compile a stakeholder matrix for their countries based on a standardized template.

Using the data collection template table and the mapping exercise partners were asked to finalise their countries' stakeholder matrix (see Annex 1) and were also asked to compile a list of stakeholders including relevant information such as: name, category, geographical scope, roles and activities, partnerships and networks, sources of funding, contacts (website).

A simple Google-Forms based questionnaire<sup>1</sup> for partners was also provided to structure this package of information. Mapping stakeholder relationships involved identifying how stakeholders interact, collaborate, or compete within the Mystical Danube project. This process highlighted key partnerships, cross-border projects, and any existing tensions or synergies. By analysing these relationships, stakeholders could be prioritized based on their ability to influence and their level of interest in the initiative which is one of the most valuable inputs to the composition of the Policy Recommendation.

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<sup>1</sup> <https://forms.gle/VxXDt4ayUk1R2Laf6>

High-influence, high-interest stakeholders were closely engaged and actively involved in decision-making, while those with high influence but low interest required targeted strategies to build awareness and satisfaction. Similarly, low-influence but highly interested stakeholders could benefit from capacity-building opportunities to enhance their involvement, and low-influence, low-interest stakeholders could be monitored with minimal engagement. This combined analysis ensured that resources are effectively allocated to foster impactful collaborations.

## Collection of national relevant policies

The policy analysis process involved a structured and comparative approach to evaluate national and macro-regional policies, strategies, and projects across Central and Eastern Europe. Data was organized into key categories, such as policy objectives, strategies, projects, and outcomes, ensuring consistency and comparability. Benchmarks were defined to assess alignment with international frameworks or sustainability principles for instance. Comparative analysis highlighted similarities, differences, and practices, while gaps were identified in different areas such as policy focus, geographic coverage, and sustainability. A generic regional SWOT analysis was also made based on each country's own (local, national) SWOTs - to evaluate strengths, weaknesses, opportunities, and threats. Key themes were clustered to identify broader trends, and a policy gap matrix was used to visualize disparities. Finally, issues were prioritized based on urgency, impact, and feasibility, forming the basis for targeted recommendations tailored to address gaps and enhance collaboration.

Partners helped especially in the collection of policies and strategies followed by an online evaluation questionnaire about the key categories, placing the most relevant policies and strategies to predefined benchmarks, and gaps.

# 4. Findings

The region has strong assets and good strategic understanding, but is held back by fragmentation, weak coordination, and limited implementation capacity.

Across the analysed action plans – Călărași (RO) , Ipoly Valley & Börzsöny (HU) , Island of Pag (HR) Komovi Nature Park (ME) , Ada Huja (SRB), Veľký Lél (SK) , Međimurje (HR) and Tržič (SI), Plovdiv District (BG), Piskavica Village (BiH) - a highly consistent development pattern emerges regarding sustainable tourism, heritage valorisation, and regional development in Central and Eastern Europe.

First, all regions demonstrate strong natural and intangible cultural heritage assets combined with relatively low or fragmented tourism utilisation. Whether river landscapes (Danube floodplains, Lower Danube), mountain ecosystems (Komovi, Ipoly Valley & Börzsöny), or rural cultural landscapes (Tržič, Međimurje), the core issue is not resource scarcity but under-valorisation and weak integration into coherent tourism products. Heritage – especially intangible elements such as storytelling, traditions,

gastronomy, and local identity – is widely recognised but still insufficiently operationalised in tourism systems.

Second, a recurring structural weakness is fragmentation – both territorially and institutionally. Most of the local pilot sites explicitly highlight:

- lack of unified regional branding (Ipoly Valley & Börzsöny)
- weak coordination mechanisms (Komovi, Călărași)
- dispersed and uneven tourism offers across settlements

This results in low visibility, inconsistent visitor experience, and inefficient resource use. Third, infrastructure and accessibility gaps are systemic across cases. These include:

- weak transport connectivity (especially rural areas)
- underdeveloped visitor infrastructure (trails, interpretation, accommodation)
- limited digital presence and marketing capacity

These constraints directly limit tourism growth and diversification. Fourth, all plans converge on a shift in tourism model: away from volume-driven tourism toward slow, experience-based, community-oriented tourism. This includes:

- storytelling routes and interpretation
- eco- and nature-based tourism
- local product and gastronomy development
- small-scale, low-impact infrastructure

Importantly, some regions (e.g., Ipoly Valley) explicitly reject mass tourism growth in favour of quality over quantity. Fifth, community involvement is central but still developing. All plans emphasise participatory processes and local engagement, yet also reveal:

- limited local capacity
- dependence on external project frameworks
- need for training, coordination, and empowerment

Thus, community-based tourism is a strategic objective, not yet a mature system. Finally, a key cross-cutting insight is that these action plans are well-aligned with EU-level narratives (sustainability, heritage, community, green transition), but they remain largely project-driven and operationally fragile. Implementation depends heavily on:

- continued funding (EU, national)

- local institutional capacity
- sustained stakeholder cooperation

## 4.1. Country specific summaries:

### 4.1.1. Island of Pag (Croatia)

The Island of Pag represents a **highly developed but structurally imbalanced tourism destination**, combining exceptional natural and cultural heritage with a dominant mass tourism model. The island's distinctive karst landscape, biodiversity-rich areas, and strong intangible heritage (lacemaking, gastronomy, traditions) provide a solid foundation for diversified, experience-based tourism. At the same time, Pag benefits from strong market visibility and accessibility, making it one of the more mature destinations among the analysed cases.

However, the action plan clearly identifies **overconcentration and overdependence on seasonal, coastal, and party tourism**, which creates significant environmental pressure, infrastructure strain, and social tensions. Tourism flows are spatially and temporally uneven, with inland areas and cultural assets remaining underutilised. This results in a dual structure: economically successful tourism alongside **long-term sustainability risks**.

A key structural weakness is the **under-integration of intangible cultural heritage into tourism products**. While traditions and local identity are strong, they are not systematically transformed into high-value, year-round tourism experiences. In parallel, governance fragmentation across municipalities and limited coordination mechanisms reduce the effectiveness of strategic planning and implementation.

The plan emphasises a strategic shift toward **diversification and rebalancing**, focusing on eco-tourism, cultural tourism, gastronomy, and small-scale, community-based experiences. It also highlights the need for improved infrastructure, better visitor management, and stronger stakeholder cooperation.

Overall, Pag is a **mature but unsustainable tourism system in transition**, where the main policy challenge is not development, but **restructuring and rebalancing** toward a more resilient, heritage-based, and community-oriented model.

### 4.1.2. Călărași County (Romania)

Călărași County has strong natural assets linked to the Danube (wetlands, biodiversity, river landscapes) and a layered cultural heritage, but tourism remains underdeveloped and weakly structured. The action plan highlights that the area benefits from proximity to major urban markets (Bucharest, Constanța, Bulgaria) yet lacks a clear tourism identity and coherent product

development. Existing infrastructure improvements (marina, promenade, cycling routes) provide a foundation, but accessibility, interpretation, and service quality remain uneven.

The key challenge is the **limited valorisation of natural and intangible heritage**, despite clear potential for storytelling-based tourism. Traditions, gastronomy, and local narratives are present but not systematically integrated into tourism offers. Stakeholder consultations also revealed gaps in visitor infrastructure, cultural programming, and coordinated destination management.

Strategically, the plan focuses on **community-based tourism development**, diversification of visitor segments, and small-scale, eco-friendly infrastructure. There is a strong emphasis on linking heritage with experience design (storytelling, cultural encounters) and positioning the area within the wider Lower Danube tourism network.

Overall, Călărași is an **emerging destination with high potential but low maturity**, where the main task is building a coherent tourism system from fragmented assets.

### 4.1.3. Ipoly Valley & Börzsöny Region (Hungary)

The Ipoly Valley & Börzsöny region is characterised by rich natural landscapes (national park areas, forests) and strong cultural identity (Palóc heritage, local myths) but suffers from **fragmented tourism development and low visibility**. Tourism supply is uneven across settlements, with varying capacities and weak coordination.

A central issue is the **lack of a unified regional structure**: no strong destination management body, no common branding, and limited digital presence. Infrastructure gaps – especially transport accessibility and outdated tourism facilities – further constrain development. At the same time, the region is environmentally sensitive, facing climate risks such as water shortages and habitat degradation.

Importantly, the strategy explicitly rejects mass tourism growth and instead promotes a **“slow tourism” model**, focusing on high-quality, nature-based, and culturally rich experiences. Cultural storytelling (legends, historical sites) is identified as a key asset for differentiation.

The plan prioritises infrastructure improvement, heritage interpretation, local product development, and **inter-municipal and cross-border cooperation**, recognising that fragmentation is the core barrier.

Overall, this is a **well-positioned but structurally fragmented region**, where governance and coordination are the main bottlenecks.

### 4.1.4. Komovi Nature Park (Montenegro)

Komovi Nature Park represents a high-value mountain ecosystem with strong biodiversity, traditional pastoral culture (katuns), and authentic rural lifestyles. Despite this, tourism development remains limited due to **poor infrastructure, low visibility, and demographic decline**.

The action plan clearly identifies **depopulation and weak economic activity** as key structural challenges, alongside insufficient coordination between stakeholders. While natural and cultural assets are strong, they are not effectively translated into tourism products or market presence.

The plan adopts an **integrated, multi-sectoral approach**, combining nature protection, heritage valorisation, and local economic development. A strong institutional actor (protected area management) plays a central role, which is a relative strength compared to other regions.

Key priorities include improving infrastructure, strengthening destination branding, enhancing stakeholder coordination, and developing authentic tourism experiences rooted in local traditions. Community involvement – especially rural households – is seen as essential for success.

Overall, Komovi is a **high-potential but peripheral and vulnerable region**, where tourism is expected to act as a tool for rural revitalisation.

#### 4.1.5. Velký Lél (Slovakia)

Velký Lél is a unique Danube floodplain island with exceptional ecological value and deeply rooted traditional land-use practices. The action plan positions the area as a **model for low-impact ecotourism**, where nature conservation and cultural heritage are tightly integrated.

Unlike some other regions, the plan is relatively coherent and structured, with clearly defined priorities and a strong emphasis on **institutional capacity, visitor management, and environmental resilience**. More than 35 concrete actions translate strategy into implementation.

The main challenges relate to balancing tourism development with ecological sensitivity and ensuring long-term viability of local livelihoods. Intangible heritage (traditional practices, oral histories) is explicitly recognised as a core component of the tourism offer.

The strategy focuses on infrastructure improvements (eco-centre, trails), community engagement, heritage revitalisation, and diversification of funding sources. There is also a strong emphasis on monitoring and adaptive management.

Overall, Velký Lél is a **pilot-type model case**, with relatively strong strategic coherence and a clear sustainability orientation.

#### 4.1.6. Municipality of Tržič (Slovenia)

Tržič represents a mountain destination with a diverse heritage base (geological, industrial, alpine, and intangible cultural heritage) and relatively advanced integration into existing strategic frameworks. Unlike more peripheral regions, it builds on **existing tourism products and municipal strategies**.

The key challenges are **overconcentration of day visitors, limited accommodation capacity, traffic pressure, and fragmented tourism offer**. These are typical issues of a semi-developed destination transitioning toward sustainability.

The action plan focuses on **rebalancing tourism spatially and structurally**, promoting low-impact tourism, improving visitor management, and increasing local value creation. Strong emphasis is placed on involving local stakeholders and integrating heritage into experience-based tourism products.

A notable strength is the **clear linkage between strategy and implementation**, positioning the action plan as a bridge between high-level planning and concrete measures.

Overall, Tržič is a **transitioning destination**, moving from conventional tourism toward a more sustainable, community-based model.

#### 4.1.7. Međimurje County (Croatia)

Međimurje County presents a well-developed conceptual approach to integrating natural and intangible cultural heritage into tourism through a **multi-site, network-based model**. The region leverages its rivers (Mura, Drava), cultural narratives (e.g., Pozoj legend), and cross-border position.

A key strength is the **structured stakeholder engagement process** and clearly defined SMART objectives across four priority areas: heritage preservation, integrated tourism development, capacity building, and coordination mechanisms.

However, underlying challenges include demographic decline, the need for stronger local capacity, and the necessity to move from planning to implementation. The plan recognises that sustainable development requires not only heritage valorisation but also **institutional coordination and community empowerment**.

A notable feature is the focus on **interpretation infrastructure (contact points, storytelling tools)** and the creation of a coherent thematic route within the transnational framework.

Overall, Međimurje is a **strategically mature but implementation-dependent region**, with strong planning logic but typical CEE execution risks.

#### 4.1.8. Piskavica Village (Banja Luka, Bosnia and Herzegovina)

The Piskavica action plan represents a **strongly community-driven, bottom-up rural development model**, centred on the preservation and active use of natural and intangible cultural heritage. The village benefits from rich traditions (music, crafts, gastronomy, rituals) and a high level of social cohesion, with active participation from local residents, associations, and institutions. This creates a solid foundation for developing **authentic, experience-based rural tourism**.

The plan clearly identifies that the main challenge is not the lack of heritage assets, but their **limited valorisation, weak infrastructure, and low market visibility**. Tourism is currently underdeveloped, with insufficient accommodation capacity, limited digital presence, and a lack of professional skills in tourism management. Financial constraints and fragmented institutional support further limit development potential.

A major strength of the plan is its focus on **integrating heritage into economic activities**, particularly through local product development, storytelling-based tourism, and educational programmes. The concept of linking agriculture, crafts, and tourism (e.g. “from field to table”, traditional product branding) reflects a well-aligned approach with current sustainable tourism trends.

The strategic priorities focus on **basic infrastructure development, product creation, digital promotion, and capacity building**, indicating an early-stage destination that requires foundational investments before scaling. Strong emphasis is placed on education, intergenerational knowledge transfer, and stakeholder cooperation, which are critical for long-term sustainability.

Overall, Piskavica is a **high-potential but underdeveloped rural destination**, where the key policy need is **enabling conditions**: infrastructure, skills, and coordinated support to transform strong local identity into a viable and sustainable tourism economy.

#### 4.1.9. Plovdiv District - Digital Action Plan (Bulgaria)

The Bulgarian action plan represents a **technology-driven approach to heritage valorisation and tourism development**, focusing on the use of digital tools to improve accessibility, visibility, and visitor engagement. Unlike more infrastructure-heavy plans, this document prioritises **digital transformation as a catalyst** for sustainable tourism and cultural heritage promotion.

The plan recognises that many heritage assets – both natural and intangible – remain **underrepresented and insufficiently accessible**, particularly to wider and international audiences. The key challenge identified is not necessarily the lack of content, but the **lack of structured digitalisation, storytelling, and integrated platforms** that would make these assets visible and usable.

A central strength of the plan is its emphasis on **digital storytelling, mapping, and platform development**, including tools such as virtual routes, online content, and interactive visitor experiences. These are designed to enhance both pre-visit inspiration and on-site engagement, while also supporting destination branding.

However, the plan also highlights structural limitations, including **uneven digital capacities among stakeholders, lack of technical skills, and fragmented data management**. Without addressing these gaps, digital tools risk remaining isolated pilot solutions rather than scalable systems.

Strategically, the plan focuses on **capacity building, platform integration, and content development**, aiming to create a coherent digital ecosystem that connects stakeholders and improves user experience. It aligns well with EU-level priorities on digitalisation but requires strong coordination and long-term governance mechanisms.

Overall, this is a **modernisation-oriented intervention**, where the key policy challenge is ensuring that digital tools are not standalone outputs, but **embedded into broader tourism and regional development strategies**.

#### 4.1.10. Serbia Pilot Site: EcoZone Ada Huja (Belgrade)

The Ada Huja action plan represents a **distinct urban regeneration-based approach to sustainable tourism development**. Located close to central Belgrade, the area has evolved from a former industrial and waste site into a developing ecological and recreational zone along the Danube. Its transformation highlights the potential of post-industrial landscapes to become multifunctional spaces combining **environmental restoration, leisure, and tourism**.

The site's main strength lies in its **hybrid character**, integrating natural heritage, existing urban infrastructure, and cultural-historical elements. It already offers a range of facilities – including a marina, sports infrastructure, and event spaces – supporting leisure, sports, and nautical tourism. At the same time, its historical layers provide a basis for developing **storytelling-driven visitor experiences**, adding depth to its tourism offer.

From a governance perspective, Ada Huja benefits from a **relatively structured stakeholder environment**. A dedicated public enterprise manages the site, while the City of Belgrade, the Municipality of Palilula, and various public and private actors contribute to its development. This creates stronger coordination potential than in many rural pilot sites, although the diversity of stakeholders also introduces complexity.

The main challenge is that the site remains in a **transitional phase**, balancing ecological rehabilitation with increasing tourism and recreational use. While infrastructure and accessibility are relatively advanced, the **development of coherent, market-ready tourism products and a clear destination identity is still limited**. Ensuring environmental sustainability alongside growing visitor pressure is also a key concern.

Overall, Ada Huja illustrates how urban brownfield areas can be transformed into **sustainable, multifunctional tourism destinations**, with a particular need to focus on product development, positioning, and long-term environmental management to fully realise its potential.

## 5. Comparative Analysis

Across the ten analysed action plans from Central and Eastern European pilot sites, a highly consistent strategic logic emerges, despite differences in geography, development level, and tourism pressure. All plans are rooted in a shared framework that positions **sustainable, community-based tourism as a key driver for rural development**, while carefully balancing **environmental protection and socio-economic benefits**.

At the core of every action plan is the recognition that natural and cultural heritage must be treated as a single, integrated asset. Rather than developing tourism products in isolation, the plans systematically **combine protected landscapes, biodiversity, traditional knowledge, and intangible cultural elements**—such as local stories, customs, and identities—into coherent, experience-based offers. This integrated approach is operationalised through the concept of “storytelling routes”, which serve both as a product development tool and as a mechanism for regional branding.

A second defining feature is the strong emphasis on **community-led development**. Local stakeholders are not merely consulted but positioned as active co-creators and long-term custodians of tourism development. This includes a deliberate focus on intergenerational knowledge transfer, local entrepreneurship, and inclusive participation across sectors. The plans consistently highlight that without genuine community ownership, neither sustainability nor long-term competitiveness can be achieved.

Another shared challenge addressed in all cases is the **structural imbalance of tourism demand, particularly strong seasonality and limited diversification of tourism products**. In response, all action plans prioritise the development of year-round, experience-based tourism offers, including eco-tourism, cultural tourism, gastronomy, wellness, and active outdoor experiences. The aim is not necessarily to increase visitor numbers, but to improve the quality, distribution, and economic impact of tourism flows.

Closely linked to this is the recognition that cooperation and governance structures are critical bottlenecks. Many regions **lack effective coordination** between municipalities, service providers, and institutions. As a result, the action plans consistently propose stronger public–private–civil collaboration models, as well as regional and transnational networking, to enable coherent product development, joint marketing, and resource sharing.

A distinctive methodological element across all plans is the use of **storytelling as a strategic tool**. Local myths, legends, and cultural narratives are not treated as supplementary content, but as central components of tourism product design and destination identity. This reflects a broader shift from traditional sightseeing toward immersive, narrative-driven visitor experiences.

In parallel, all plans underline the need for **capacity building and skills development, particularly at the local level**. Training programmes, knowledge-sharing mechanisms, and the development of new roles—such as local “storytellers” or guides—are seen as essential to ensuring both quality and authenticity in tourism services.

Importantly, these are not abstract strategies. Each action plan is structured around SMART objectives, measurable indicators (KPIs), and monitoring frameworks, ensuring that implementation can be tracked, evaluated, and adjusted over time. This reflects a **strong alignment with EU policy expectations** around accountability, impact measurement, and evidence-based planning.

Finally, a **cross-cutting objective** in all cases is the rebalancing of tourism flows in space and time. By promoting lesser-known areas and extending the tourism season, the plans aim to reduce pressure on over-visited destinations while unlocking economic opportunities in rural and peripheral regions.

In summary, the ten action plans follow a shared development model that can be described as a transition from fragmented, seasonal tourism toward integrated, community-driven, and experience-based destination development, where heritage, storytelling, and sustainability jointly create long-term value for both visitors and local communities.

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## **Common strategic patterns**

### **1. Shift from volume-driven to value-driven tourism**

*All pilot sites prioritise sustainable, low-impact tourism models that focus on quality, experience, and long-term local benefits rather than increasing visitor numbers.*

### **2. Integrated valorisation of natural and cultural heritage**

*Natural assets and intangible cultural heritage are consistently treated as a single, combined resource, forming the basis of innovative, experience-based tourism products.*

### **3. Community-led development as a prerequisite for sustainability**

*Local communities are positioned as active co-creators, not just stakeholders. Their involvement is essential for ensuring authenticity, ownership, and long-term viability.*

### **4. Storytelling as a strategic development tool**

*Narrative-based approaches (myths, traditions, local identity) are systematically used to design tourism products, strengthen destination branding, and enhance visitor engagement.*

### **5. Diversification to address seasonality and limited product offer**

*All action plans promote year-round, thematic tourism (e.g. eco, cultural, gastronomy, wellness) to reduce seasonal dependency and stabilise local economies.*

### **6. Strengthening multi-level governance and cooperation**

*Effective collaboration between public, private, and civil actors is identified as a critical success factor, with a need for improved coordination structures and joint initiatives.*

### **7. Capacity building and local skills development**

*Training, knowledge transfer, and the development of new local roles (e.g. guides, “storytellers”) are key to improving service quality and enabling community participation.*

### **8. Evidence-based planning and measurable implementation**

*All plans apply SMART objectives, KPIs, and monitoring frameworks, ensuring accountability, adaptability, and alignment with EU policy standards.*

### **9. Territorial and temporal rebalancing of tourism flows**

*A shared objective is to promote lesser-known rural areas and extend the tourism season, contributing to more balanced regional development and reduced pressure on hotspots.*

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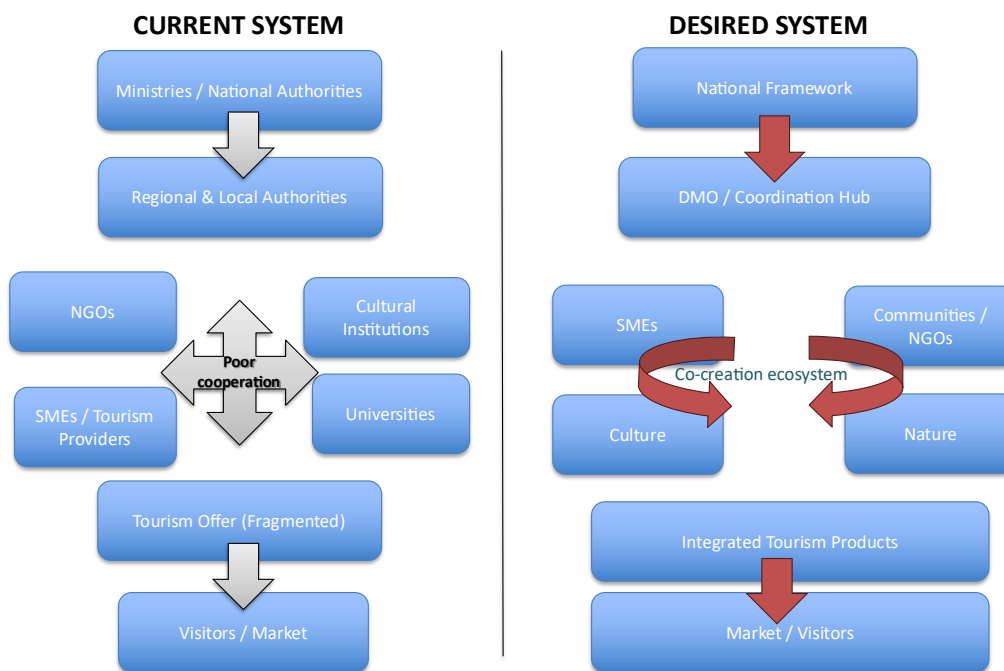
# 6. Stakeholders

## 6.1. Governance and stakeholder system insights in the Danube Region

The analysis of stakeholder matrices across six of the pilot countries (see Annex - Romania, Bulgaria, Bosnia and Herzegovina, Croatia, Montenegro, Hungary and Slovakia) reveals a highly consistent structural pattern in the governance of tourism and heritage-based development. Despite differences in territorial context, all cases demonstrate **public sector dominance, fragmented stakeholder ecosystems, and weak market integration**, which together significantly constrain implementation capacity.

Across all countries, stakeholders with the highest decision-making power are overwhelmingly **public authorities**, including ministries, regional governments, municipalities, and public agencies. These actors are typically positioned in the “manage closely” or “keep satisfied” categories, indicating strong institutional control over strategic direction. While this provides a stable policy framework, it

### From Fragmented Systems to Destination Ecosystems



The key challenge is transforming fragmented systems into coordinated, market-oriented destination ecosystems.

Figure 1: CEE tourism governance system (current and desired system)

also results in a system where development remains largely **administratively driven rather than market oriented**.

At the same time, the **private sector – particularly tourism SMEs, service providers, and operators – plays a relatively weak role** in decision-making structures. In most cases, these actors are positioned in lower-power categories, such as “monitor” or “keep informed”, despite being responsible for the actual delivery of tourism experiences. This imbalance creates a structural disconnect between **strategy design and implementation**, limiting the ability to develop market-ready, competitive tourism products.

Civil society organisations, cultural associations, and local communities are widely represented across all matrices, often reflecting strong local engagement and social capital. However, their placement typically indicates **high interest but low influence**, meaning that while participatory approaches are present, they rarely translate into real decision-making power or operational leadership. As a result, community-based tourism remains more a conceptual priority than a fully functioning model.

Another defining feature is the **high degree of fragmentation**, particularly at the local and regional levels. In several cases – most notably Croatia – the stakeholder landscape includes many municipalities, associations, and institutions with overlapping roles and limited coordination. This complexity is not matched by strong coordinating mechanisms, leading to inefficiencies, duplication of efforts, and difficulties in implementing integrated destination strategies.

A critical systemic gap across all countries is the absence or weakness of **“bridge actors”** – organisations capable of connecting policy, market, and community levels. While some forms of destination management organisations or tourism boards exist, their role is often limited, and they do not function as fully empowered coordinators or product integrators. This lack of intermediaries results in poorly connected systems, where stakeholders operate in parallel rather than as part of a coherent destination ecosystem.

Finally, the analysis highlights that **knowledge institutions and market demand perspectives are underrepresented** in governance structures. Universities and research organisations typically play a marginal role, limiting innovation and evidence-based decision-making. At the same time, the absence of demand-side actors (e.g. market intermediaries, visitor insights) indicates that tourism development remains internally focused, with insufficient attention to customer needs and market trends.

Stakeholder gap analysis			
Dimension	Observed Gap	Why it Matters	Targeted Policy Response (1:1)
<b>Governance structure</b>	Public sector dominates; top-down system	Limits flexibility, slows implementation, weak ownership at local level	<b>Establish formal multi-level governance models</b> (e.g. legally recognised DMOs with clear mandates and accountability)

<b>Stakeholder balance</b>	Private sector has low influence	Those who deliver tourism are not shaping it	<b>Institutionalise private sector involvement</b> (co-design platforms, mandatory stakeholder boards, co-financing schemes)
<b>Coordination mechanisms</b>	Fragmented actors, overlapping roles	Inefficiency, duplication, no integrated destination offers	<b>Create regional coordination hubs / DMOs</b> with operational responsibility for integration and delivery
<b>Community engagement</b>	High participation, low influence	Community-based tourism remains theoretical	<b>Shift to co-creation models</b> (community-led projects, micro-grants, local product ownership schemes)
<b>Bridge actors missing</b>	Weak or absent intermediaries	No one connects policy–market–community	<b>Fund and empower intermediary organisations</b> (DMOs, clusters, product integrators) as core system actors
<b>Market orientation</b>	Supply-driven, asset-focused	Poor product-market fit, low competitiveness	<b>Introduce demand-driven development tools</b> (market research, product design support, pilot-testing mechanisms)
<b>Knowledge &amp; innovation</b>	Universities marginalised	Weak innovation, no data-based decisions	<b>Integrate research &amp; innovation actors</b> into governance (living labs, applied research partnerships, data platforms)
<b>Funding model</b>	Short-term, project-based funding	No continuity, no scaling	<b>Shift to multi-year, performance-based funding programmes</b> tied to measurable outcomes
<b>Destination management capacity</b>	Weak operational capacity	Strategies exist, delivery fails	<b>Provide embedded capacity support</b> (mentoring, advisory, implementation teams—not just training)
<b>Demand-side integration</b>	Market actors missing from system	Weak visibility, poor access to customers	<b>Integrate market channels</b> (tour operators, platforms, digital distribution, data feedback loops)

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*Effective tourism development requires shifting from fragmented, supply-driven governance systems to **coordinated, market-integrated destination ecosystems with clear ownership and implementation capacity.***

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Overall, the stakeholder matrices confirm that the key constraint in the region is not the availability of actors, but the **structure and balance of the system itself**. The dominance of public institutions, combined with weak private sector influence, fragmented local networks, and missing coordination mechanisms, results in governance systems that are **stable but not effective in delivering market-oriented, sustainable tourism development**.

In essence, the region’s challenge is not stakeholder scarcity, but the need to transform fragmented and imbalanced stakeholder landscapes into **coordinated, market-responsive destination systems**.

## 7. Sustainable tourism development - gap Analysis

GAP	PROBLEM	RISK	POLICY SOLUTION
Weak implementation capacity at local level	Plans are strong strategically, but many rural areas lack: 1/ dedicated staff 2/ project management capacity 3 /operational know-how	Plans remain “paper strategies”.	<ul style="list-style-type: none"> <li>Establish local implementation units / destination coordinators</li> <li>Provide targeted capacity-building funding (not just training, but hands-on support)</li> <li>Introduce mentoring schemes (experienced → emerging regions)</li> </ul>
Fragmented governance and unclear ownership	1/ No clear “who is in charge” 2/ Overlapping roles (municipality, NGO, tourism board, project partners) 3/ Weak coordination structures	Slow or inconsistent implementation, duplicated efforts	<ul style="list-style-type: none"> <li>Create formal governance models (Destination Management Organisations or equivalents)</li> <li>Define clear mandates and accountability structures</li> <li>Link funding eligibility to cooperation frameworks</li> </ul>
Lack of sustainable financing models	1/ Heavy reliance on EU/project funding	Activities stop after funding ends	Develop hybrid financing models: <ul style="list-style-type: none"> <li>local tourism taxes</li> </ul>

	2/ No clear post-project financial sustainability 3/ Limited private sector investment		<ul style="list-style-type: none"> <li>• membership / cluster fees</li> <li>• public–private partnerships</li> </ul> Support revenue-generating tourism products, not just concepts
Weak market orientation	Strong focus on supply (heritage, assets) Limited understanding of: 1/ target segments 2/ customer journeys 3/ pricing and positioning	Products exist but are not competitive or sellable	<ul style="list-style-type: none"> <li>• Require market validation in planning phase</li> <li>• Introduce product development frameworks (test – pilot – scale)</li> <li>• Support joint marketing and branding platforms</li> </ul>
Storytelling is conceptual, not operational	Storytelling appears everywhere But often lacks: 1/ concrete formats 2/ trained storytellers 3/ real visitor experiences	Remains “nice narrative”, no real impact	<ul style="list-style-type: none"> <li>• Develop standardised storytelling toolkits</li> <li>• Fund pilot experiences (guided tours, digital content, immersive formats)</li> <li>• Train local storytellers as a recognised role</li> </ul>
Limited private sector engagement	1/ SMEs mentioned, but not deeply integrated 2/ Weak incentives for businesses to invest	No scalable economic impact	<ul style="list-style-type: none"> <li>• Introduce business incentive schemes (grants tied to product development)</li> <li>• Support local clusters (tourism, gastronomy, crafts)</li> <li>• Facilitate B2B cooperation and packaging of services</li> </ul>
Insufficient digitalisation	Weak digital presence Lack of: 1/booking systems 2/ integrated platforms 3/ data usage	Low visibility and accessibility	<ul style="list-style-type: none"> <li>• Develop shared digital platforms (regional level)</li> <li>• Support digital skills for SMEs</li> <li>• Promote data-driven destination management</li> </ul>

Monitoring exists, but impact logic is weak	KPIs are present But often: 1/ too generic 2/ not linked to real outcomes (income, jobs, retention)	Hard to measure real impact	<ul style="list-style-type: none"> <li>• Introduce standardised impact indicators, e.g.: <ul style="list-style-type: none"> <li>○ local income generation</li> <li>○ job creation</li> <li>○ seasonality reduction</li> </ul> </li> <li>• Align with EU cohesion and green transition metrics</li> </ul>
Climate adaptation is underdeveloped	Sustainability is mentioned But climate risks are not operationalised: 1/ drought 2/ biodiversity loss 3/ extreme weather	Long-term vulnerability of destinations	<ul style="list-style-type: none"> <li>• Integrate climate adaptation plans into tourism strategies</li> <li>• Fund nature-based solutions (water retention, ecosystem protection)</li> <li>• Require climate risk assessment in all action plans</li> </ul>

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*Action plans of the Mystical Danube pilot areas are strategically aligned and conceptually strong, but also reveal the biggest systemic gap, which is execution capacity and market reality.*

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The next phase should shift from “planning sustainable tourism” to building operational, market-ready, and financially viable destination systems.

## 8. SWOT Analysis

The comparative positioning of the ten pilot sites reveals a highly consistent regional pattern: **most destinations are characterised by high development potential but low market and institutional maturity**. This indicates that the primary challenge across the Danube-region pilots is not the lack of assets, but the limited capacity to translate these assets into structured, competitive tourism systems.

STRENGTHS	WEAKNESSES
<p><b>Rich natural and cultural heritage base</b></p> <ul style="list-style-type: none"> <li>• High biodiversity, protected areas (e.g. Natura 2000)</li> <li>• Strong intangible heritage (traditions, stories, crafts, gastronomy)</li> <li>• Authentic, non-mass tourism environments</li> </ul> <p><b>Strong alignment with EU policy priorities</b></p> <ul style="list-style-type: none"> <li>• Sustainability, green transition, community-based development</li> <li>• Clear fit with transnational initiatives (e.g. Danube Strategy)</li> </ul> <p><b>Existing stakeholder engagement and social capital</b></p> <ul style="list-style-type: none"> <li>• Active local communities and NGOs</li> <li>• Participatory planning processes already tested</li> <li>• Cross-sector cooperation initiated</li> </ul> <p><b>Emerging storytelling-based tourism model</b></p> <ul style="list-style-type: none"> <li>• Innovative approach combining heritage + narrative</li> <li>• Strong potential for differentiation vs. mainstream tourism</li> </ul> <p><b>Relatively low tourism pressure (in many areas)</b></p> <ul style="list-style-type: none"> <li>• Opportunity to shape development sustainably from early stages</li> <li>• Avoid over-tourism patterns seen elsewhere</li> </ul>	<p><b>Limited institutional and implementation capacity</b></p> <ul style="list-style-type: none"> <li>• Lack of dedicated destination management structures</li> <li>• Weak project execution and coordination capabilities</li> </ul> <p><b>Fragmented governance and cooperation gaps</b></p> <ul style="list-style-type: none"> <li>• Unclear roles between actors</li> <li>• Weak regional coordination and joint decision-making</li> </ul> <p><b>Strong seasonality and limited product diversification</b></p> <ul style="list-style-type: none"> <li>• Tourism concentrated in short peak periods</li> <li>• Underdeveloped off-season offers</li> </ul> <p><b>Weak market orientation and product development maturity</b></p> <ul style="list-style-type: none"> <li>• Supply-driven approach (heritage-led, not demand-led)</li> <li>• Limited experience in packaging, pricing, and selling tourism products</li> </ul> <p><b>Low visibility and insufficient digitalisation</b></p> <ul style="list-style-type: none"> <li>• Weak online presence and marketing</li> <li>• Lack of integrated booking and information systems</li> </ul> <p><b>Dependence on external funding</b></p> <ul style="list-style-type: none"> <li>• Limited self-sustaining business models</li> <li>• High reliance on EU/project-based financing</li> </ul>
<p><b>OPPORTUNITIES</b></p> <p><b>Growing demand for sustainable and experience-based tourism</b></p> <ul style="list-style-type: none"> <li>• Increasing interest in slow tourism, nature, authenticity</li> <li>• Post-COVID shift toward rural and less crowded destinations</li> </ul> <p><b>Development of transnational thematic routes</b></p> <ul style="list-style-type: none"> <li>• “Storytelling routes” as scalable, cross-border products</li> <li>• Joint branding and marketing potential at Danube-region level</li> </ul> <p><b>Digital transformation and smart destination tools</b></p> <ul style="list-style-type: none"> <li>• Opportunity to leapfrog into modern platforms and data-driven management</li> <li>• Low-cost digital visibility improvements</li> </ul> <p><b>Local economic development and diversification</b></p> <ul style="list-style-type: none"> <li>• Tourism as a driver for rural income and job creation</li> </ul>	<p><b>THREATS</b></p> <p><b>Climate change and environmental degradation</b></p> <ul style="list-style-type: none"> <li>• Biodiversity loss, drought, extreme weather</li> <li>• Increased pressure on fragile ecosystems</li> </ul> <p><b>Depopulation and ageing rural communities</b></p> <ul style="list-style-type: none"> <li>• Loss of human capital and local knowledge</li> <li>• Reduced capacity for service provision</li> </ul> <p><b>Risk of uncoordinated or unsustainable tourism growth</b></p> <ul style="list-style-type: none"> <li>• Replication of mass tourism models</li> <li>• Overuse of sensitive natural areas</li> </ul> <p><b>Competition from established destinations</b></p> <ul style="list-style-type: none"> <li>• Stronger branding, infrastructure, and market access elsewhere</li> <li>• Difficulty in reaching international markets</li> </ul> <p><b>Funding discontinuity</b></p> <ul style="list-style-type: none"> <li>• Risk of project-driven development without long-term continuity</li> <li>• “Start–stop” implementation cycles</li> </ul>

<ul style="list-style-type: none"> <li>• Integration with local products (food, crafts, services)</li> </ul> <p><b>Access to EU funding and policy support</b></p> <ul style="list-style-type: none"> <li>• Cohesion policy, Green Deal, rural development funds</li> <li>• Increasing support for community-led initiatives</li> </ul> <p><b>Untapped heritage assets</b></p> <ul style="list-style-type: none"> <li>• Large share of cultural and natural assets still underutilised</li> <li>• Potential for new tourism products and experiences</li> </ul>	<p><b>Low private sector engagement</b></p> <ul style="list-style-type: none"> <li>• Limited investment and entrepreneurship</li> <li>• Weak scaling potential of tourism products</li> </ul>
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A clear majority of the pilot sites—including **Veľký Lél, Piskavica, Ada Huja, Komovi Nature Park, Međimurje County, Plovdiv District, Ipoly Valley & Börzsöny, and Plovdiv** – fall into the category of **“emerging high-potential destinations”**. These areas are typically rich in natural and cultural heritage, often supported by strong community engagement and alignment with sustainable tourism principles. However, they remain in an early or intermediate stage of development, facing common constraints such as fragmented governance, weak destination management structures, limited product development, and low market visibility. In these regions, tourism is still largely supply-driven, with insufficient focus on packaging, pricing, and delivering market-ready experiences.

In contrast, the **Island of Pag** stands out as the only pilot site that clearly approaches the **“high potential – high maturity”** quadrant. It benefits from an already established tourism market, strong visibility, and existing infrastructure. However, its strategic challenge differs from the others: rather than building tourism from scratch, Pag must **manage and transform an existing tourism model**, addressing issues such as seasonality, environmental pressure, and the need to diversify beyond mass tourism toward more sustainable, experience-based offers.

The **Călărași (Romania)** pilot occupies a transitional position between these two groups. It demonstrates a higher level of organisational and strategic maturity than most emerging regions but has not yet reached full market readiness. This places it in a **“moving toward maturity”** category, highlighting its potential to serve as a bridge or reference case within the network.

Notably, none of the pilot sites fall into the **low-potential categories**, either in terms of weak assets or saturated, constrained destinations. This reinforces the conclusion that the region as a whole is **resource-rich but system-poor**: the fundamental ingredients for successful tourism development are present, but the enabling systems – governance, market orientation, financing, and implementation capacity – are not yet fully developed.

Overall, the mapping highlights a systemic regional pattern rather than isolated cases. The dominance of the **“high potential – low maturity”** category suggests that policy interventions should prioritise **capacity building, product development, and governance strengthening**, rather than basic promotion or infrastructure expansion alone.

In essence, the key development task for the region is not to create new tourism potential, but to **convert existing potential into operational, market-ready, and sustainable destination systems**.

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## 9. Recommendations

### 9.1. Context and Purpose

Across ten pilot sites in the Danube Region, a consistent development pattern has emerged: **rural and peripheral areas possess significant natural and cultural heritage assets, strong alignment with EU sustainability objectives, and growing interest in community-based tourism models.** However, these assets are not yet fully translated into structured, competitive, and resilient tourism systems.

The analysed action plans demonstrate a shared strategic direction – focusing on sustainability, storytelling, and community engagement – but also reveal systemic gaps in implementation capacity, governance, market orientation, and financial sustainability.

Across all analysed countries, the stakeholder landscape demonstrates consistent systemic gaps that directly affect implementation capacity. Governance structures are predominantly top-down, with limited mechanisms for integrating private sector and community actors into decision-making processes. Coordination between stakeholders is weak, leading to fragmented initiatives and a lack of coherent destination development. In addition, the absence of effective “bridge actors”, such as fully functional destination management organisations or cluster-based intermediaries, results in poorly connected systems where stakeholders operate in parallel rather than collaboratively. Market orientation is also limited, with little integration of demand-side perspectives or data-driven approaches, while knowledge institutions remain underutilised. These patterns confirm that **the core challenge is not the availability of stakeholders, but the need to rebalance and connect them within a coordinated, market-responsive governance framework.**

### 9.2. Key Findings

#### High potential, low maturity is the dominant pattern

Most pilot sites fall into a “high potential – low maturity” category. While they benefit from:

- rich biodiversity and protected landscapes,
- strong intangible cultural heritage,
- engaged local communities,

they face common constraints:

- weak destination management structures,

- fragmented governance,
- limited product development and market readiness,
- low visibility and digital capacity.

## Integrated heritage and storytelling are emerging as core models

All pilot sites adopt an integrated approach combining natural and cultural heritage, operationalised through storytelling-based tourism products. This represents a strong foundation for differentiation and aligns well with EU priorities on sustainable and experience-based tourism.

## Community-led approaches are necessary but not sufficient

While participatory processes are well established, local actors often lack the operational capacity to implement and scale tourism products. Without targeted support, there is a risk that action plans remain at a conceptual level.

## Structural bottlenecks limit impact

Key systemic barriers include:

- insufficient coordination across governance levels,
- reliance on short-term project funding,
- weak private sector engagement,
- limited use of data and monitoring for decision-making.

## Policy Challenges

The analysis highlights a central challenge:

The Danube Region does not lack tourism potential – it lacks the systems required to convert this potential into sustainable economic outcomes.

Addressing this requires a shift from:

- project-based approaches → system-based development,
- asset identification → product development and market integration,
- participation → operational capacity and governance clarity.

# 9.3. Policy Recommendations

## National level: Enable coherent frameworks and long-term investment

National governments should:

- Establish clear governance models for destination management: introduce and support formal Destination Management Organisations (DMOs) with defined mandates and accountability.

- Shift funding towards multi-year, performance-based programmes: move beyond fragmented project funding to support integrated destination development with measurable outcomes.
- Invest in operational capacity-building: provide embedded support (mentoring, advisory services) in addition to training, focusing on product development, pricing, and market access.
- Incentivise private sector participation: introduce co-financing schemes and regulatory incentives to stimulate SME investment in sustainable tourism.
- Ensure policy integration: align tourism with rural development, environmental policy, and cultural heritage strategies.

## Regional level: Build integrated destination ecosystems

Regional authorities should:

- Strengthen coordination and cooperation mechanisms: establish or reinforce regional DMOs or clusters to coordinate stakeholders and align development efforts.
- Develop market-ready tourism products: support the transition from fragmented assets to integrated, bookable tourism offers through pilot-testing and scaling.
- Lead branding and positioning efforts: develop clear regional identities based on storytelling and ensure alignment with transnational initiatives (e.g. Danube routes).
- Invest in shared infrastructure: prioritise digital platforms, knowledge-sharing systems, and joint marketing tools.
- Act as intermediaries for funding: aggregate local initiatives into strategic portfolios and facilitate access to EU and national funding.

## Local level: Focus on implementation and authenticity

Local authorities and communities should:

- Prioritise delivery of concrete tourism products: focus on a limited number of high-quality, experience-based offers rather than broad, unfocused strategies.
- Activate local heritage and knowledge: translate traditions, stories, and practices into real visitor experiences (e.g. guided tours, workshops, events).
- Strengthen local networks: foster cooperation between local actors (e.g. producers, service providers) to create integrated offers.
- Invest in practical skills development: focus on applied competencies such as guiding, storytelling, and digital presence.
- Maintain authenticity as a competitive advantage: avoid replicating mass tourism models; build on unique local identity.

## EU level: Support scaling and system transformation

EU programmes should:

- Shift from pilot projects to scaling mechanisms: support replication and upscaling of successful models across regions.

- Standardise methodologies and tools: develop common frameworks for storytelling, community-based tourism, and monitoring.
- Enhance cross-regional learning: introduce structured exchange mechanisms (e.g. mentor regions, peer learning platforms).
- Improve funding alignment: better integrate tourism-related funding across cohesion policy, rural development, environment, and digital programmes.

## Cross-Cutting Priority

Across all governance levels, a common priority emerges:

Strengthening implementation capacity and market orientation is essential to unlock the region's tourism potential.

This includes:

- developing operational governance structures,
- building market-ready products,
- ensuring financial sustainability,
- embedding monitoring and adaptive management systems.

# 10. Conclusion

The Danube Region pilot sites demonstrate that a shared strategic vision for sustainable, community-based tourism is already in place. The next phase requires a decisive shift toward implementation, coordination, and scaling.

If supported by coherent policies and targeted investments, these regions have the potential to become flagship models of sustainable tourism development in Europe, contributing to rural resilience, cultural preservation, and the green transition.

Across the ten pilot sites analysed in the Danube Region, a clear and consistent pattern emerges. These regions are characterised by high-quality natural and cultural heritage, strong community engagement, and clear alignment with European sustainability objectives, particularly in relation to the green transition and rural development. At the same time, however, they face a shared structural challenge: while their development potential is significant, their institutional, market, and operational maturity remains limited.

In practical terms, this means that most of the pilot regions are currently unable to fully convert their existing assets into competitive, market-ready tourism products and sustainable economic outcomes. Governance structures are often fragmented, with unclear roles and limited coordination between national, regional, and local actors. Implementation capacity at the local level remains weak, with a lack of dedicated resources, skills, and support mechanisms needed to translate strategies into

concrete actions. In addition, tourism development is frequently supply-driven, focusing on heritage assets rather than on customer-oriented product design, pricing, and market access.

As a result, most of these regions remain in what can be described as a “high potential – low maturity” trap. Despite well-developed action plans and strong strategic direction – particularly around sustainability, storytelling, and community-based tourism – their real economic impact remains constrained. Without targeted policy intervention, there is a significant risk that these plans will remain under-implemented, limiting the return on both national and EU-level investments.

Addressing this challenge requires a fundamental shift in approach. Rather than focusing primarily on the development of new strategies or pilot initiatives, policy efforts should prioritise the creation of functioning destination systems. This includes establishing clear governance and coordination mechanisms, such as Destination Management Organisations or equivalent structures, capable of aligning stakeholders and driving implementation. It also requires moving from fragmented, short-term project funding towards multi-year, performance-based programmes that support long-term development and measurable outcomes.

Equally important is the need to strengthen market orientation and product development capacity. Regions must move beyond the identification of assets and towards the creation of integrated, bookable tourism experiences that combine accommodation, activities, and local products. This process should be supported by hands-on capacity-building measures, including mentoring and advisory services, with a strong focus on practical skills such as product design, pricing, digital presence, and customer engagement.

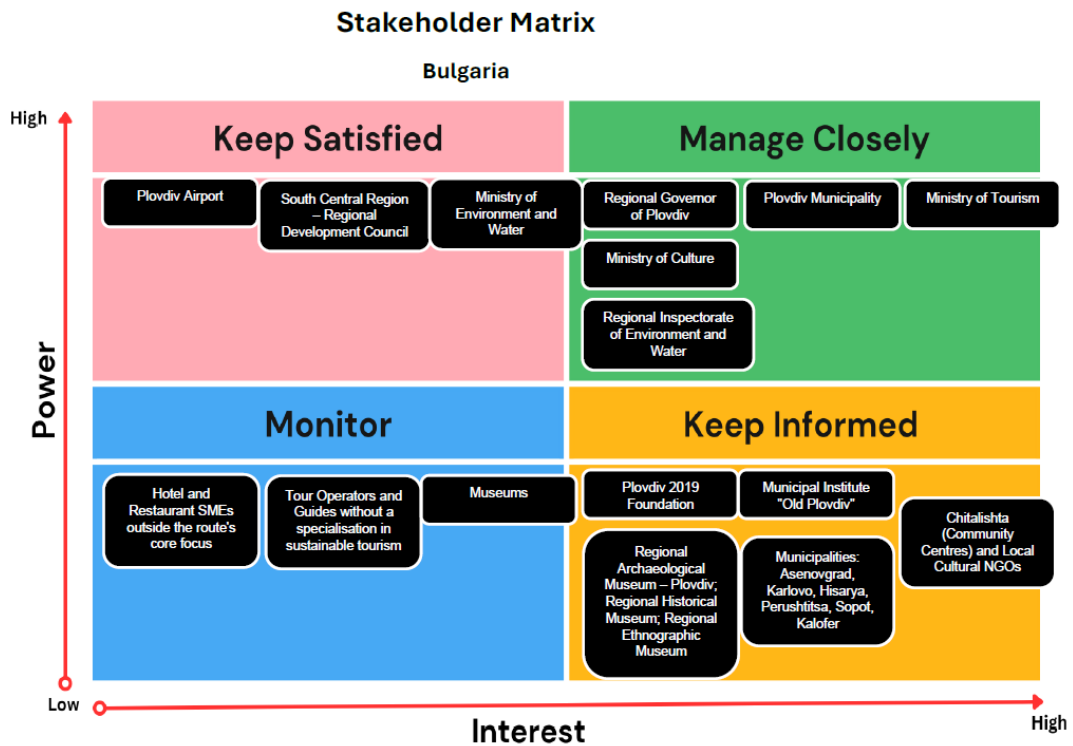
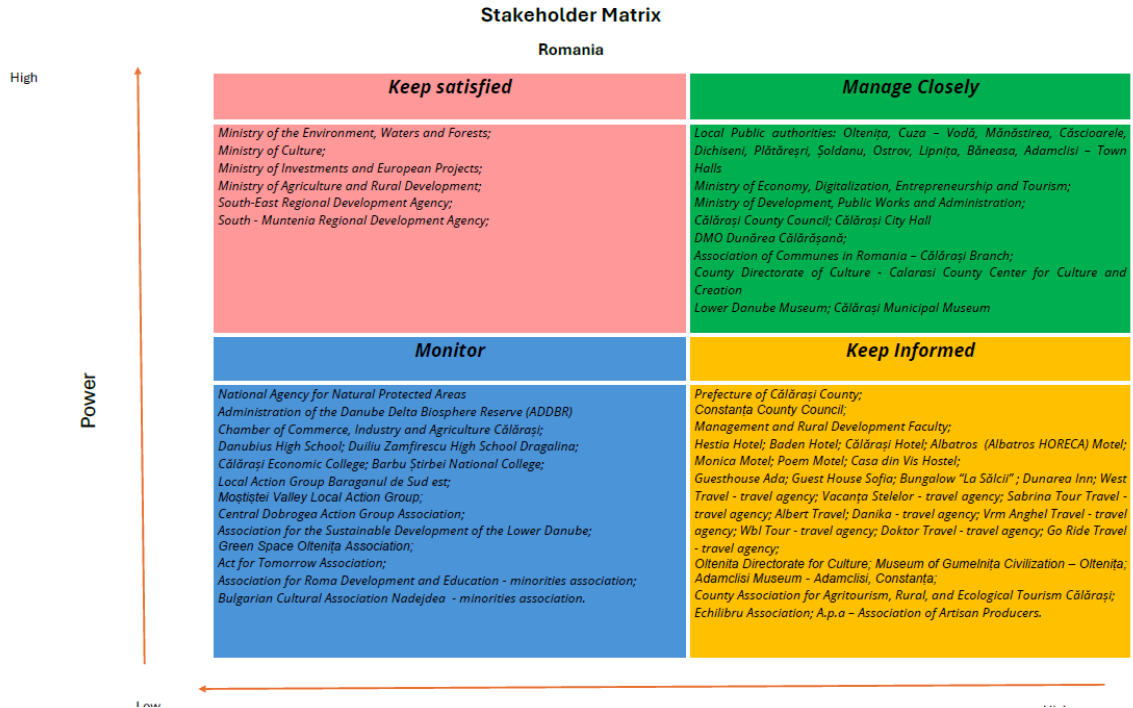
The role of the private sector is also critical. Currently underrepresented in many pilot areas, local entrepreneurs and SMEs must be more actively engaged through targeted incentives, co-financing schemes, and support for cluster development. At the same time, investment in digital infrastructure and shared platforms is essential to improve visibility, accessibility, and market reach.

These efforts must be coordinated across governance levels. National governments have a key role in establishing enabling frameworks and aligning tourism with broader policy areas such as rural development and climate adaptation. Regional authorities should act as integrators, coordinating stakeholders, developing coherent destination offers, and leading branding efforts. Local actors, in turn, must focus on implementation – transforming local heritage and knowledge into authentic, high-quality visitor experiences. At the European level, there is a need to move beyond isolated pilot projects and towards scaling and replication of successful models, supported by better alignment of funding instruments.

In conclusion, the Danube Region does not lack tourism potential. On the contrary, it possesses all the key ingredients for successful, sustainable tourism development. The central challenge lies in building the institutional, economic, and operational systems required to unlock this potential. With targeted, coordinated policy action, these regions can evolve into flagship examples of community-based, sustainable tourism in Europe, delivering tangible benefits for local economies, societies, and environments.

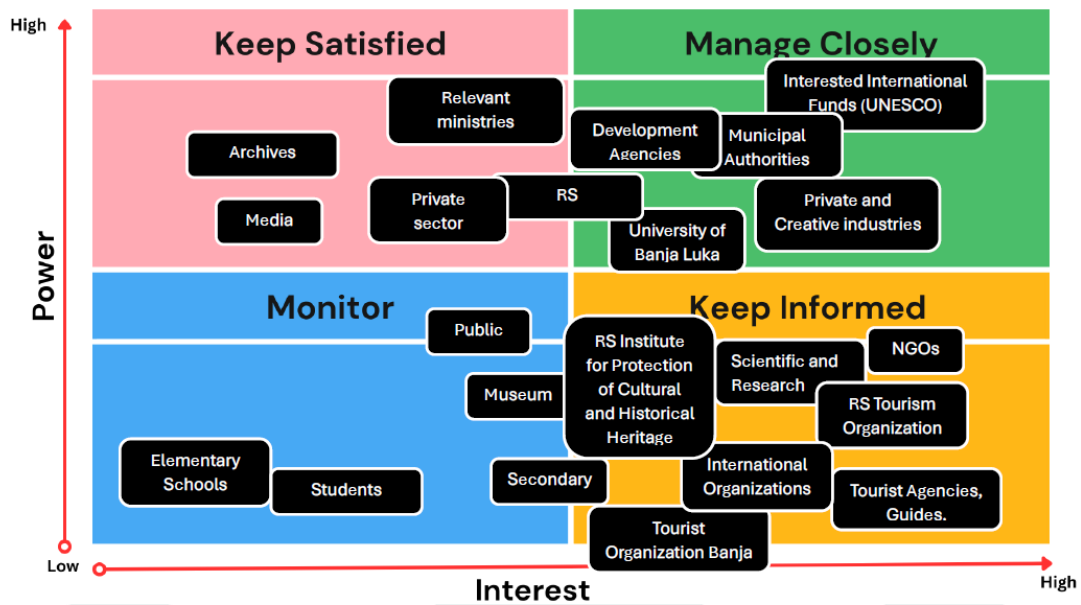
These findings are directly relevant to the design and implementation of Interreg programmes as well, as they highlight the need to complement pilot actions with stronger governance and system-level interventions. While Interreg projects successfully mobilise stakeholders and generate innovative approaches, their long-term impact is often limited by weak coordination structures, insufficient market integration, and a lack of continuity beyond the project lifecycle. Addressing these gaps requires a greater emphasis on capacity building, institutional embedding, and the scaling of successful models, as well as improved alignment between funding instruments and governance levels. By supporting the development of coordinated, market-oriented destination systems, Interreg can play a key role in enabling regions to move from experimentation to sustainable, transferable solutions with lasting territorial impact.

# Annex 1 – stakeholder matrices



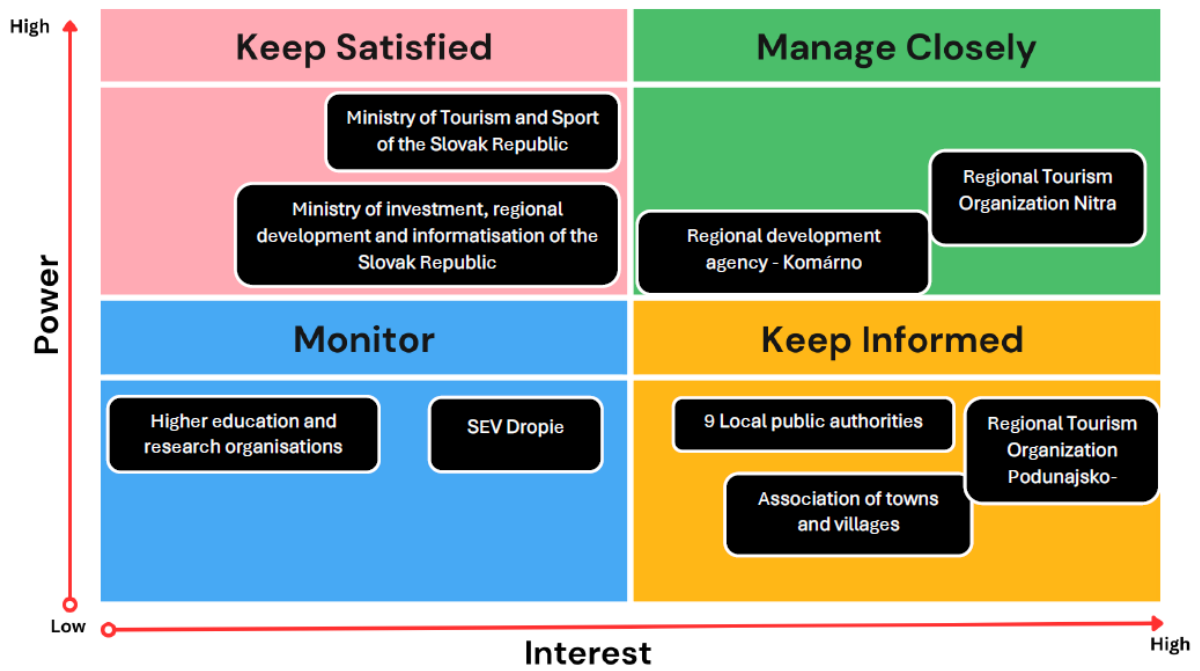


### Stakeholder Matrix Bosnia and Herzegovina



## Stakeholder Matrix

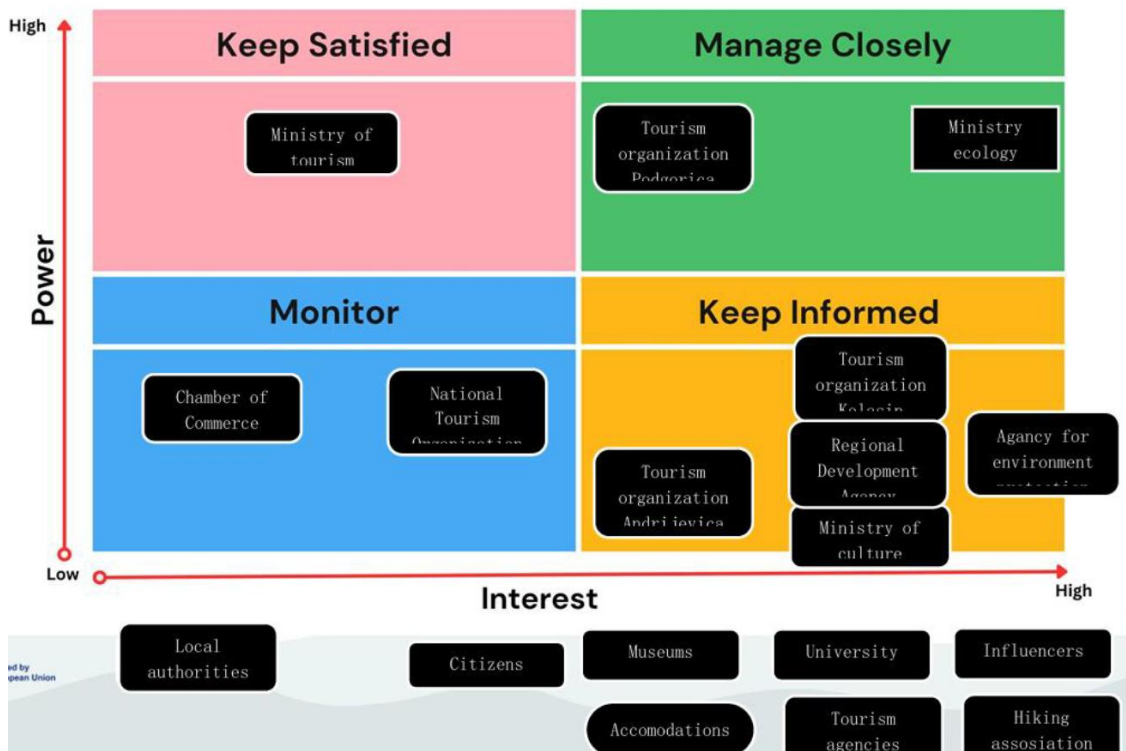
Slovakia



## Montenegro

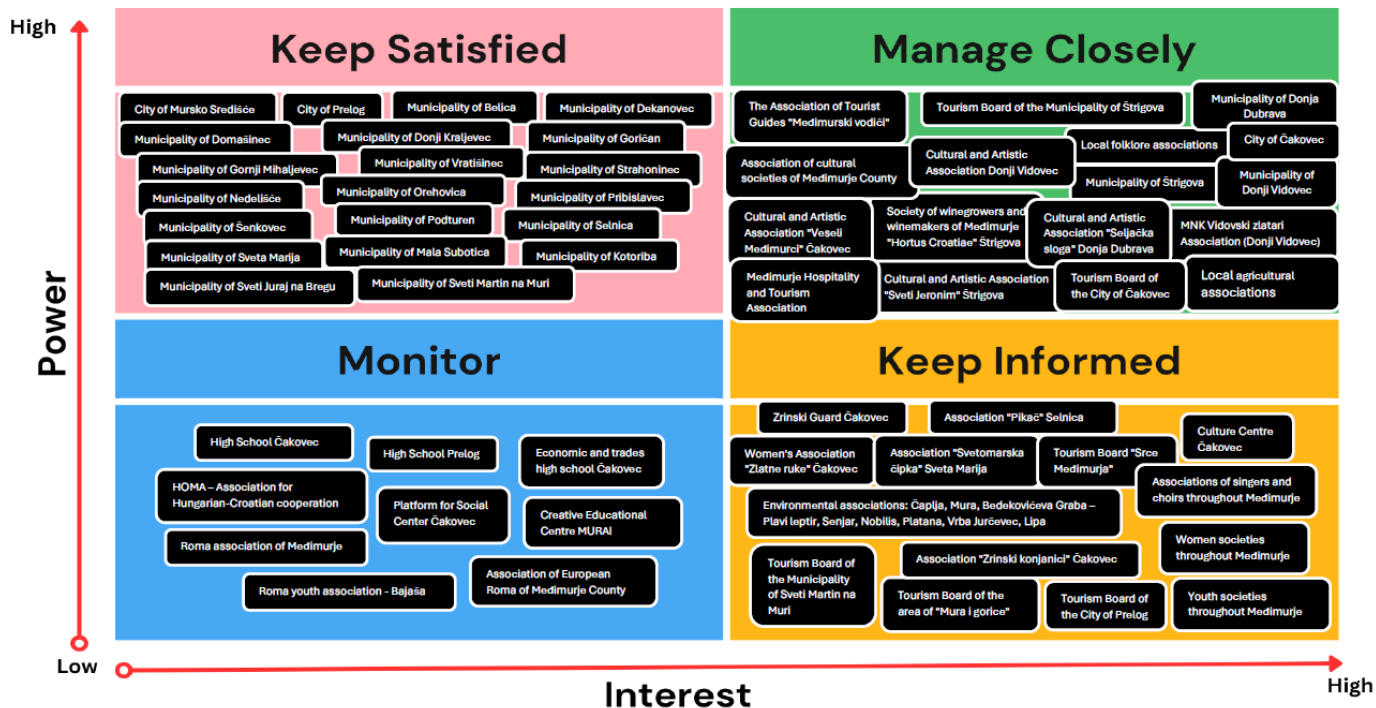
### Stakeholder Matrix

Please, name your stakeholders and place them on the matrix



## Stakeholder Matrix

Croatia



## Stakeholder Matrix - Serbia

