



RESEARCH STUDY:

**TOURISM MARKET ASSESSMENT IN
FRUSKA GORA – DANUBE REGION**

January 2014



This project is funded by the European Union

Austrian
Development Cooperation

This document has been produced with the financial assistance of the European Union and the Austrian Development Agency.

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EXECUTIVE SUMMARY

› Introduction and background

Strategic planning in tourism development is of essence for socio-economic development of rural areas such as Fruska Gora – Danube Region. Research to be presented in this Study is part of integral approach for socio-economic development of FGDR, and it was conducted in late 2013 in scope of internationally supported project “Sustainable Tourism Development in Fruska Gora Danube Region” by Austrian Development Agency. Main aim is it to analyse the current situation in the region, collect and identify key stakeholders, attractions and tourism service providers in order to shed a light on future tourism development projects.

› Situation Analysis

Fruska Gora Danube Region represents the area of five municipalities (Backa Palanka, Beocin, Sremski Karlovci, Indjija and Novi Sad) which are dominantly rural areas with exclusion of large urban, economically well developed area of Novi Sad. Main demographics of the Region, socio-economic profile and analysis of potentials for tourism development have indicated the possibility of various tourism development strategies, based on rural, natural, cultural-historic values and tourism potential of events and gastronomy in the region. On the other hand key determinants of constraints are lack of tourism expertise, cooperation and networking as well as low impact of promotional of the Region as a destination.

› Tourism Market Analysis

Main tourism attractions, manifestations and facilities were elaborated and described pointing out to key potentials for the tourism developments in scope of tourism supply of the Region. Tourism market has been assessed by trend of visitors, their preferences and demand, on the other hand, as well as attitude of local population indicating highly involved local community and participation of public.

› Strategic Plan Recommendations

Tourism development Strategy presented relies on potentials of (1) rural and agricultural tourism, (2) nature and eco tourism along with cultural historic heritage and (3) event tourism with gastronomy features.

Key determinants of future activities are focusing on education, clustering and networking, and promotion of Fruska Gora destination.

1. SITUATION ANALYSIS

› *Geographical scope*

Research analysis of tourism market is targeting Fruska Gora – Danube Region FGDR in Serbia which is comprising of the area of city of Novi Sad and 4 municipalities in Fruska Gora Region, all situated on banks of Danube River, Bačka Palanka, Beočin, Sremski Karlovci and municipality of Indjija. Area of FGDR is covering total of 1.897 km² with close to a half of million of inhabitants.

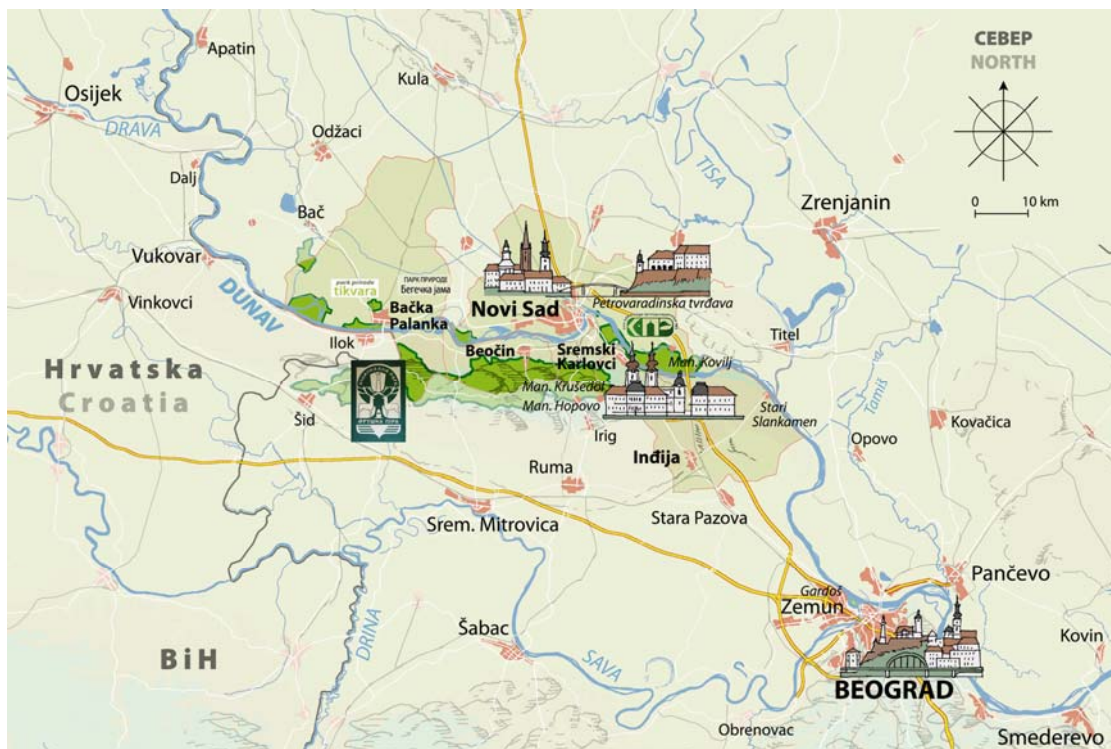


Figure 1. Mapping of FGDR / 5 municipalities, Danube River, FGNP and City of Belgrade

Region is situated in Central Vojvodina, Northwest Serbia bordering with Danube River in the west and east, Fruska Gora National Park in the South and in the west by municipalities of Bač, Odžaci, Temerin and Vrbas. It covers two administrative counties of South Backa and Srem. With exclusion of highly urban and dense area of Novi Sad and taking into consideration the homogenous area with Petrovaradin, Fruska Gora Danube Region may be characterised as predominantly agricultural and rural area.

Apart from mentioned Danube River (Corridor VII) and with regards to connectivity of the Region, its geo-strategic position is very good as it is located in high proximity of Pan Corridors X and V. Distance from the nearest airport is less than 100 kilometres, it is also well connected with railways towards north to

Budapest (Hungary) and south to Belgrade and west to Zagreb (Croatia). All characteristics mentioned are pointing out to great potential for economic development of trade, tourism and transport.

Although the Region is not officially classified it can be recognised as part of the following regions identified by international organisations or programmes: Danube region in Serbia (Austrian Development Agency), Cross-border Region between Croatia and Serbia, and also between Hungary and Serbia (IPA Cross-border Programmes), Fruska Gora Region (Master Plan).

› *Socio-economic profile*

Fruska Gora Danube Region

As previously mentioned, Region is situated in Central Vojvodina, north-western part of Serbia bordering with Danube River and Fruska Gora National Park. It covers two administrative districts of South Backa and Srem, covering the area of total 1.986 square kilometres with population of half million inhabitants. Due to the specific rural characteristics of the area with natural and cultural-historic values, highly urban part of city of Novi Sad may be partly excluded. Municipality of Petrovaradin is predominantly rural area of Novi Sad and creates homogenous area along 4 municipalities of Bačka Palanka, Beočin, Sremski Karlovci and Indjija with population of around 160 thousand inhabitants. With exclusion of highly urban and dense area of Novi Sad and taking into consideration the homogenous area with Petrovaradin, Fruska Gora Danube Region be characterised as rural and predominantly agricultural and rural area. Density of population in the region is 253 (125 with Petrovaradin, only) which high above the national average.

<i>City/Municipality</i>	<i>Area, km²</i>	<i>Agricultural area, %</i>	<i>Number of settlements</i>	<i>Population</i>	
				<i>Total</i>	<i>Per 1 km²</i>
Novi Sad	699	73,6	15	341.625	488
- Petrovaradin	89	/	4	33.865	381
Bačka Palanka	575	84,0	14	55.528	97
Beočin	186	47,4	8	15.726	85
Sremski Karlovci	51	50,3	1	8750	172
Indjija	386	85,7	11	47.433	123
FGDR	1.986	76,0	53	502.927	253
FGDR* <i>*(only Petrovaradin)</i>	1.287	72,0	37	161.302	125

Table 1. Overview of geo-demographic profile of FGDR

Bačka Palanka



The municipality Bačka Palanka is located in the west of South Bačka District covering an area of 57.865 hectares and consisting of 14 settlements. Data presented indicates that the municipality Bačka Palanka is among the larger municipalities in Vojvodina. The municipality is characterised by very favourable geo-strategic position, located on the border of the Republic of Serbia and the Republic of Croatia, on the banks of Danube River, just 40 km west of Novi Sad and 122 km northwest of Belgrade. With regards to the bordering municipalities, Bačka Palanka is surrounded: Municipality of Bač on the west, Odžaci on the northwest, the municipality of Vrbas to the north and northeast, municipality of Backi Petrovac to the east, and in the west by the municipality of Vukovar (Croatia) and municipality of Sid and Sremska Mitrovica in the south and Beočin to the south east.

According to last census in 2011, in total 56.438 inhabitants live in municipality of Bačka Palanka, with density average 98 inhabitants per square kilometre, slightly above the Serbian average of 93, determining the rural categorisation of the area. Settlement Bačka Palanka is a central community with a population of half of the total population while the other half lives in the remaining 13 settlements (Vizic, Gajdobra, Despotovo, Karadjordjevo, Mladenov, Nestin, Nova Gajdobra, Obrovac, Parage, Pivnice, Silbas, Tovarisevo, Celarevo) out of which settlements Nestin and Bizic are counting less than 1.000 inhabitants.

Key business sectors in the economic development of the municipality Bačka Palanka are agriculture and industry. The most important natural resource of the municipality Bačka Palanka is high quality agricultural land. According to data of the National Bureau of Statistics (2009), the municipality has 46.816 hectares of agricultural land, out of which the largest part high quality and fertile land with nearly 94 % of total agricultural land. The rest of the land are mainly meadows and pastures, and orchards and vineyards. A significant number of major companies is operating in the municipality, namely: Sintelon, Tarkett, Victoria group, Nectar and other small and large scale industries.

Beočin



Beočin Municipality is located in the central part of Vojvodina, in the north-western part of Serbia. Geographically, territory belongs to the northern part of Srem District, but administratively it is the part of the South Bačka District. Northern boundary of the Municipality is Danube River which divides the territory

of the Municipality and city of Novi Sad. From northeast to northwest municipality is bordering with municipality of Backi Petrovac, Bačka Palanka and city of Novi Sad. Southern part of the municipality is on slopes of FGNP. From southeast to southwest Beočin is surrounded by Irig and Sremska Mitrovica. Novi Sad, which is the administrative centre of the Autonomous Province of Vojvodina, is 17 kilometres away from Beočin.

Area of the municipality is 186 km² and it represents one of the smallest municipalities in South Bačka District. The total population according to the census of 2011 is 15.726 in a total of 5.577 households. In the area of Beočin there are eight settlements: Beočin, Rakovac Čerević, Banoštor, Šušek, Svilos, Grabovo and Lug. The average size of the settlements is 23.3 km². The largest settlement is Susek (3.940,7 ha), Beočin (3.505,6 ha) and Čerevic (3.263,6 ha). Territorial least populated area is Lug covering 996.5 ha. In terms of population, the largest settlements are Beočin (7.839 ha), Čerević (2800 ha) and Rakovac (2.248 ha). The smallest population is in a settlement Grabovo, where only 100 inhabitants reside. Beočin is the only urban centre and represents the administrative centre of the municipality. Shape of municipality is rectangular and extends in a north-south 7 to 10 kilometres, and elongated in an east-west 27 kilometres. Beočin is the administrative centre and the largest town in the municipality. Density of municipality is 84 residents per square kilometre, which is below the average for the Republic of Serbia (93) and indicates a predominantly rural area. Noticeable there is a large difference in the density of certain settlements from 7 people per km² in Grabovo to 220 which is the number of inhabitants per km² in the Beočin.

Through the municipality itself there are no any international or provincial important roads and routes. Regional routes through the territory of the municipality are: Novi Sad - Beočin - border Croatia (only 15 km from the municipality, in the West, there is a border crossing with the Republic of Croatia in Ilok), then road Irig - Vrdnik - Rakovac, which is important roads in this part of Srem and the way to Sremska Mitrovica. The most important road is the highway Belgrade - Novi Sad (E-75), which is located 17 km from the municipality.

The most common economic activity in the municipality Beočin is process industry, agriculture and trade, and almost 70% of the working population. Process industry in the municipality employs the largest number of working-age population, which is primarily related to the cement factory Lafarge BFC, which forms the basis of the entire economy of the municipality. . In the municipality operates other large foreign company - Alas Rakovac, part of the Austrian company Asamer Holding. A small number of employees have trade and repair services and other small scale business.

The achievement of macroeconomic stability and a favourable macroeconomic situation resulted in the emergence of positive trends in the labour market, but problems in the areas of employment, such as lack of jobs as a result of the lack of

economic activity and high unemployment in the formal economy are still present.

Sremski Karlovci



Sremski Karlovci lies on the banks of the Danube and slopes of Fruska Gora 11 kilometres from Novi Sad and 57 kilometres from Belgrade. Geographically located in the northeast of Srem, but administratively belongs to the South Bačka District. By area of 50,3 square kilometres and number of inhabitants, 8.819 it represents the smallest municipality in the district. Density of population, 173 is above the Serbian average which is mainly because the municipality of Sremski Karlovci was given the status as a cultural-historical and religious centre. The territory of the Municipality of Srem Karlovci is bordering with Novi Sad to the north and two municipalities of Srem district in the south, Indjija and Irig.

Within 10 km distance from the highway E-75 (Budapest-Belgrade-Nis), and nearby highway E-70 (Zagreb-Belgrade) administrative-territorial location of the municipality is providing the good connectivity with the rest of the neighbouring municipalities and districts for efficient development of various types of economic activity, focusing on tourism. Of particular importance is proximity and good transport routes to Novi Sad and Belgrade, the largest tourist centres in the state.

Only 50,3% of the total area of the municipality represents the share of agricultural land, which is much less than the average in Vojvodina (82,8%) or in the South Bačka District (81,1%). The largest percentage of the working population is employed in manufacturing followed by the trade sector, education, transport, government and health. Sremski Karlovci represent the historical religious and educational Serbian centre from, 18th and 19th centuries.

Indjija



Indjija is located in the south-western part of Srem District, and it is the third largest town in Srem (larger towns are city of Sremska Mitrovica and Municipality of Ruma). Municipality covers an area of 385 km² and consists of 11 settlements, Indjija being the centre, Beska, Krcedin, Ljukovo, Jarkovci, Maradik, Novi Karlovci, Novi Slankamen, Slankamenacki Vinogradi, Stari Slankamen and Cortanovci. Indjija has 48075 inhabitant and density of population per 1 square kilometre of 125, slightly above

the national average of 93. According to the density of the area, Indjija is classified as rural municipality bordering with Novi Sad, Sremski Karlovci and Titel in the north, Zrenjanin and Stara Pazova in the East and South, while on west two municipalities of Srem are linked to Indjija, Irig and Ruma.

City of Indjija has advantageous geo-strategic position being 42 km away from Belgrade and 35 km from Novi Sad. Indjija is considered as location with favourable position with ideal conditions for the development of road and rail transport, as well as overall economic development of the area. The main factor of economic development of the Municipality of Indjija is agriculture, industry and small businesses (craft shops, small and medium enterprises). Indjija is also well known for establishment of work zones enabling the construction of new industrial capacity and the possibility of permanent dislocation of industry from the residential parts of the municipality, which primarily reflects the quality of the environment in the city and surrounding settlement, as well as the quality of working conditions and production. The fact that Indjija has two fully functional, equipped industrial work zones, which can have a remarkable geographic and traffic position, sets Indjija at the top "business location offers" in Serbia in terms of potential and attractiveness of investment.

Novi Sad



The City of Novi Sad is administrative centre of the South Back district and Autonomous Province of Vojvodina situated on Banks of Danube River covering 699 ha across two municipalities, Novi Sad and Petrovaradin. Population of City of Novi Sad is 341.625 inhabitants with density of 488 inhabitants per 1 square kilometre. City of Novi Sad is only urban area in the District with high rate of economic development, low share of agricultural activities.

Novi Sad has an exceptionally favourable natural-geographic as well as economic geographic position, taking into account its surroundings and the fact that it stands on a crossroad of land and water roads. It is located on the eastern tourist route which connects the North, Central, and West Europe with the Adriatic, Aegean, and Black Sea. The significance of this route, and also of Novi Sad, is even more emphasised thanks to the Corridor VII (the Danube River) and Corridor X (Central Europe – the Black and Aegean Sea), which have a direct impact on this area. The City lies on the main European E-75 route, which is the main artery for Southern, Central and Eastern Europe. Furthermore, this transport crossroad is located at the distance of about 50 km from the international E-70 route, which connects West and East Europe.

Municipality	Settlement	Area, ha		Population	Density per 1km²
Novi Sad	<i>Novi Sad</i>	7.658	60.989	341.625	488
	<i>Futog</i>	8.326			
	<i>Veternik</i>	1.941			
	<i>Begeč</i>	4.343			
	<i>Kisač</i>	2.967			
	<i>Rumenka</i>	2.824			
	<i>Stepanovićevo</i>	4.711			
	<i>Kač</i>	7.487			
	<i>Čenej</i>	8.611			
	<i>Budisava</i>	1.478			
	<i>Kovilj</i>	10.643			
Petrovaradin	<i>Petrovaradin</i>	2.591	8.925	33.865	381
	<i>Sr. Kamenica</i>	3.049			
	<i>Bukovac</i>	1.391			
	<i>Ledinci</i>	1.894			

Table 2. Overview of settlements in City of Novi Sad

Novi Sad represents the largest city in Region and as administrative centre of the South-Bačka District and Vojvodina, and it reflects the general economic development of the region of Vojvodina. City has a developed economic infrastructure for a variety of economic activities, a major university centre and innovative business culture and entrepreneurial spirit. As all surrounding municipalities gravitate towards Novi Sad, it is also the centre of the overall development of the area economic growth and cooperation between municipalities. Based on current indicators of the state of the economy and employment, it is clear that area of Novi Sad with the environment, which includes municipalities of Petrovaradin, Beočin and Sremski Karlovci acquired the status of a single metropolitan area (the metropolitan area), which will continue grow in the coming years.

› **SWOT Analysis**

In order to elaborate on strengths and weaknesses of tourism capacities and potential of the Fruska Gora Danube Region and its corresponding municipalities, detailed analysis was carried out using the SWOT methodology. Use of this method enables comparative internal and external analysis of strong and weak points of tourism and provides framework for the assessment of new initiatives and development strategies. Analysis below shows the elaboration of identified internal strengths and weakness in the Region with focus on homogeneous rural area rather than analysis of five municipalities with urban area of Novi Sad. When it comes to external opportunities and threats, Novi Sad represents one of the key points.

STRENGTHS	WEAKNESS
<ul style="list-style-type: none"> › significant natural resources and nature protected areas (<i>Fruska Gora NP, Bagremara SNR, Tikvara NP, Karadjordjevo SNR, Koviljsko-Petrovaradinski Rit SNR</i>); › existence of unique cultural and historical heritage (<i>Petrovaradin, Sremski Karlovci, Monasteries</i>); › hospitality of multiethnic and tolerant local population; › favourable geo-strategic position vicinity of major airports, railway and roads (<i>E-70, E-75</i>) and Danube River; › tradition of winemaking (<i>Srem Karlovci, Banoštor</i>); › ecological environment – heavy industry free zone (<i>exception of Beočin</i>); › active tourism organisations of municipalities in the Region; › well developed visitors centres, info points and tourist guide services; › good visibility on domestic market; <ul style="list-style-type: none"> › active participation of local community; › tourism manifestations › old handicrafts and other non-material attractions 	<ul style="list-style-type: none"> › lack accommodation capacity; › insufficient number specialised experts; › lack unified tourist supply; › weak analytical and statistical base; › insufficient utilisation of Fruska Gora brand; › lack internal communication and cooperation among institutions; › lack camping-space; › lack of unified promotion of the Region <ul style="list-style-type: none"> › insufficient tourist signalisation; › low level of economic development and unemployment › insufficient utilisation of Danube River banks <ul style="list-style-type: none"> › Low level of expertise in providing tourism services › Illegal construction sites

Table 3. Internal Framework of FGDR SWOT Analysis

With regards to the external environment, analysis of the Region below shows the key possibilities and main obstacles for improving the tourism in FGDR.

<i>OPPORTUNITIES</i>	<i>THREATS</i>
<ul style="list-style-type: none"> › <i>support for cluster organisations;</i> › <i>specialization and educational programmes for tourism service providers;</i> › <i>increase in support of events and manifestations;</i> › <i>standardisation and certification and quality assurance services;</i> › <i>recognition of need for marketing and promotional activities;</i> › <i>provincial and republic funds;</i> <ul style="list-style-type: none"> › <i>funds European Union;</i> › <i>good practice and know-how of cross-border projects and initiatives;</i> › <i>vicinity of Belgrade and Novi Sad as main emissive centres in Serbia and Ilok (Croatia);</i> › <i>Tourism Fairs and Tourism organisations</i> › <i>New preferences and new emerging market trends (ecotourism, rural tourism, etc.)</i> › <i>Diversification of tourism services (agritourism, handicrafts, gastronomy...)</i> 	<ul style="list-style-type: none"> › <i>devastation of natural goods</i> › <i>increasing traffic and mass-tourism</i> › <i>significant changes in the political environment;</i> › <i>weak coordination with neighbouring regions and countries;</i> › <i>unfavourable economic situation and impact of crisis on some market;</i> › <i>strong competitive regions;</i> › <i>non-motivated local population for participation in tourism services</i>

Table 4. External Framework of FGDR SWOT Analysis

It is safe to conclude that Fruska Gora Danube Region has great potential for tourism development which may be based on rural potential of the area with high potential use of agriculture, old handicrafts, gastronomy and events within the Region. On the other hand, nature protected areas and significant cultural historical heritage within the region provides to opportunity for special interest tourism development.

Main indication from SWOT is low level and insufficient utilisation of key tourism potentials which is mostly due to the lack of clustering of the supply, low cooperation and lack of expertise when it comes to tourism services. Despite the vicinity of Novi Sad and Belgrade there has not been active unified promotion of tourism products of Fruska Gora region and mainly management of visitors is carried out stochastically, and without any long term aims. Benefits of the environment are in need of educated personnel and motivated local community in future days to come, while use of resources needs to be utilised with cluster and strategic approach and promoted accordingly.

2. TOURISM MARKET ANALYSIS

Within the Region, as presented in SWOT analysis there is a high potential for tourism development, mainly relying of the natural values, cultural-historical heritage, gastronomy and events. Tourism Resources Inventory II (Annex 2) shows the large number of attraction and tourism facilities within the Region. Five main types have been identified, namely 1) Agri and ethno tourism facilities 2) Restaurants, 3) Wineries and wine cellars, 4) Monasteries and 5) Manifestations and events. In first part of this section, main attractions, facilities and manifestations, attracting many visitors to FGDR will be presented. Following two parts will elaborate on main stakeholders (governmental and business organisations) and key tourism market figures when it comes to receptive tourism.

› Attractions and Facilities

Main attractions within the region are in line presented tourism potential: nature, cultural-historic sites, gastronomy and events. Among the hundreds of various types identified within the research and Inventory development, several most significant for the Region, will be presented below.

Fruska Gora National Park – Novi Sad

Fruska Gora is proclaimed a National Park in 1960 in order to provide its permanent protection and to improve its natural resources and beauty. The area of active protection is 25.525 ha. Fruska Gora is an isolated, narrow, island mountain in Pannonian basin. Its location, specific geological history and different microclimatic conditions make it very interesting and important site both to visitors, tourism and nature lovers. Thanks to unique and very rich deposits of fossil fauna and flora, Fruska Gora is called the 'mirror of geological past'.



The main characteristic of this region is the existence of numerous protected, rare and endangered species. Fruska Gora's valleys are covered with pastures and fertile fields, numerous vineyards and orchards which decorate its lower slopes while higher ground, above 300 meters, is covered with dense deciduous forests. Fruska Gora is home to 16 orthodox monasteries famous for

their specific architecture, treasuries, libraries and frescoes and numerous archaeological sites from prehistoric and historic times as well.

Lake of Ledinci (Ledinačko jezero) was a small artificial lake on the mountain of Fruška Gora, near Novi Sad, in the Srem region of the Vojvodina province of Serbia. The lake was created during the NATO bombing of Yugoslavia in 1999, when pumps in the abandoned trachyte quarry was damaged and stopped pumping the water out of the quarry. The subterranean waters, so as the waters from two creeks, Lukin Svetac and Srebrni creek began filling the quarry. The lake covers an area of 4 hectares and it is surrounded by steep cliffs from most sides, with a slope on the rest, allowing the swimmers to enter. It is bean-shaped, with length of about 400 metres and greatest width of about 100 m. The average depth is 15 m, and the biggest already reached 50 m. It lies on altitude of 300 m. The water is characteristically green and clear, due to constant influx from feeding springs, and chilly even in hot summer days. As the lake has no outflow, the water level continuously rose and represented a threat for the village of Stari Ledinci. Due to its outstanding natural resources, wonderful landscapes, exceptional charm and beauty, this site are ideal for attracting nature lovers and recreational tourists.

Petrovaradin Fortress – Novi Sad



Petrovaradin Fortress is located in Novi Sad, on the Petrovaradin cliff, above the right bank of the Danube River. Petrovaradin Fortress is symbol of Novi Sad and one of the best preserved fortifications in Europe, which has been constructed by Austro-Hungarians in order to protect the town of Novi Sad from Turkish occupation. The present day Petrovaradin Fortress was built from 1692 to 1780 on the place of former settlement that dates back to the prehistoric era. Archaeological excavations in the Upper Town of the Petrovaradin Fortress foundations have documented human settlements dating back to the Middle Palaeolithic - Early Stone Age (about 60.000-90.000 BC), and from the Neolithic - Late Stone Age (4.200 to 3.200 BC), the period of discovered earth fortification with wooden palisades /Late Bronze era/. With this new development it has been established that there has been a continuous human settlement at this site from the Palaeolithic age to the present. During the archaeological research excavations in Petrovaradin Fortress carried out in 2005, archaeologists also discovered another significant find. Examining remains from the early Bronze age (c. 3000 BC), ramparts were discovered which testify that already at that time a fortified settlement existed at the Petrovaradin site. On the site of the Petrovaradin Fortress was Celtic settlement in 100 BC invaded by

Romans who constructed Fortification. This fort was destroyed by Huns in the 5th century to be rebuilt by Byzantines as the Petrikon Fortification. The first appearance of the present-day Petrovaradin fortification comes from 1235 when Hungarian King Bela IV let Catholic monks Cistercians to build its Belakut Abbey on the remains of the Cusum. Recently during the reconstruction works on the Petrovaradin Fortress infrastructure remains of settlement and the church from this period have been found. Construction of the present day Petrovaradin Fortress was initiated by Austro-Hungarians in order to protect them from invading Turks. Its initiator and creative constructor was marquee Sebastian Voban, French military officer, architect and writer from the period of Lui XIV. The Petrovaradin Fortress dates from the periods of Austrian emperors - Leopold I, Joseph I, Karlo VI, Maria Teresa and Joseph II on the place of former fortification at the inaccessible left bank of Danube River. Petrovaradin Fortress was under Turkish occupation from 1683 until 1699 and after the Peace-Treaty of Karlovci Austro-Hungarians entered the town and started building the new fortress.

Beočin Monastery – Beočin

The Beočin monastery is a Serbian Orthodox monastery, located just outside of Beočin, on Fruška Gora mountain in the northern Serbian province of Vojvodina. The date of its founding is unknown. It was first mentioned in Ottoman Turkish records dated in 1566/1567. The Beočin monastery church is dedicated to the Ascension of Christ. The monastery is located in Beočin Selo, not far from Novi Sad, on the northern slopes of Fruška Gora. There is no reliable information on the date of the monastery's founding. It is first mentioned in written sources as Novosel or Novoselo monastery near Beočin, when it had a small single-nave church, thought to have been built under the influence of traditional architecture. A key year in the history of the monastery is 1697, when patriarch Arsenije Čarnojević allowed monks fleeing the Rača monastery to take up residence in the abandoned Beočin monastery. Immediately on arrival at Beočin, the monks demolished the old church and in 1708 built a new one of wood nearby. Today's monastery church was built in the period between 1732 and 1734, while the three-storey steeple against the western wall of the church was a slightly later addition. The monastery complex was fully restored in 1893. The iconostasis in the monastery church was painted by Dimitrije Bačević, Janko Halkozović and Teodor Kračun in the 1760s and 70s. Serbian poet Jovan Grčić Milenko spent his last days in Beočin monastery.

Beočin Monastery was declared a Monument of Culture of Exceptional Importance in 1990, and it is protected by Republic of Serbia .

Patriarchy Residence – Sremski Karlovci

Patriarchy Residence in Sremski Karlovci represents the most monumental building from the 19th century in Vojvodina is. It is formed by combination of



baroque and pseudo-renaissance styles. The Museum of the Serbian Orthodox Church, so-called Treasury, is situated within the palace. Nowadays, the Residency accommodates the seat of Srem Diocese and it serves as the summer residency of the Serbian patriarch.

Karadjordjevo – Bačka Palanka



An oasis of rest, hunting and hors sport, first famous for horse farm of full – blooded horses. For tourist visits, there is a chance for hunting ground, horse farm, hippodrome and horse farm museum tour. „First May Reveille” is the traditional cultural, sport and tourist event in Karadjordjevo and it has been held for 25 years. Hunting house Diana and bungalows in Hunting centre Vranjak. Game and fish specialties are offered to the guests. Hunting ground Karadjordjevo exclusively does the commercial hunting for big game of high hunting. The special reservation of nature Karadjordjevo is famous for Tito’s residence.

Djundjerski Castle – Bačka Palanka



The castle Dundjerski is significant, which was built as a castle summer house in neoclassicism style at the beginning of 19th century. The complex consists of several buildings put up in a spacious park, arranged in the manner of English gardens. It is on a squire’s estate established in the second half of the 18th century. The smaller manor house was built by Marfi Lipot at the turn of the 19th century. The larger mansion was built by Nikola Bezeredi between

1834 and 1837, as an imposing landowner's mansion. It features several windows in a row with volute console supported lintels and a series of balusters at the bottom. At its east side there is a baroque portico supported by four Doric columns with a triangular tympanum above, and along a garden side there is a terrace with a staircase. There also used to be a Classicistic pavilion in the garden, but it is lost now. The conservation and restoration works were done in stages in 1985, 1988 and 2003.

Krčedinska ada – Indjija



The left bank of the Danube opposite Krčedin, with its forest of Canadian poplars, the spacious Krčedin river island, numerous estuaries and ponds, is a veritable paradise for all those who love nature, ecology, hunting, fishing, and photo safaris. Krčedin river island with its 10 km shore and an area of 9 km² is among the largest Danube river islands from the Drava-Danube to the Tisa-Danube confluence. The Gardinovacki estuary (called Dunavac), leading to a network of other estuaries and ponds separates the island from the river bank.

*Detailed tourism potential of the Region in terms of tourism supply is presented in **Annex II Tourism Resources Inventory – Attractions and Facilities**, as part of this Research Study.*

› ***Manifestations and events***

International conference of Eco Tourism – Novi Sad

The conference deals with the main subjects of ecotourism development in the region. The main objective of the conference (with variation of annual topics) is to create a consensus on the importance of ecotourism development of the Danube region and its impact on the economy of the area, as well as acceptance of ecotourism as a relevant factor in recognising the equal of the Danube region as a quality and whole-tourism destination. The conference gathers main scholars and stakeholders from the participants, trade associations, nongovernmental organisations, governments, local governments, tourism organisations and to the scientific and professional institutions and represents one of the main events for the possible clustering the tourism supply, networking and policy making for the FGDR. Event is held annually in early October and hosted by Ecotourism Serbia.

Bazaar of wine, tambura and handicrafts – Beočin

The event is organised by Cultural Centre of Beočin in collaboration with "Sveti Trifun", winemakers association from Banoštor and women's associations that are operating in the municipality Beočin as well as local tambura orchestras. Event is gathering wineries, old handicrafts, artists and other folklore of the area into Festivity lasting few days and offering opportunity to promote their products typical of this region. Bazaar visits hundreds of people in February each year. This manifestations may be used to promote souvenirs and handicraft typical for the Region and may serve as pilot of the other parts of the region and as well as cooperation among municipalities.

Palanka Eco Spring – Bačka Palanka

The event takes place in the primary school "V. Karadzic" and has multiple impacts - primarily educational and promotional. Schools are participating with the gardens and exhibition stands, in art, literature and informatics competition) and also fair (plants, bee products, objects made of ceramic flowerpot plants, fountains and garden program) is being installed for presentation and for the students to sell their products and thus develop marketing and management skills. On several occasions during these events forums for the public on ecological issues were held. Eco Spring is organised annually in late March and lasts few days.

Event is compatible with potential of the Region and may be transformer as a presentation fair of the Region and also serve to boost old handicrafts and souvenirs among people.

"Grožđebal" Karlovac Grape Ball – Sremski Karlovci

Grape Ball in Sremski Karlovci took place from the 28th till the 30th of September. Manifestation "Karlovac grape vintage" is an event that followed the tradition of a folk ceremony that celebrated the beginning of the grape harvest. During Grape ball the wine capital had a festive atmosphere in honour of this year's grape harvest. Along the central street, exhibitors presented their best wines on wooden stands, all ready for the moment of truth when wine-lovers would pass their judgment – whose wine tastes best and is most fragrant. Visitors had the opportunity to buy all sorts of grapes, wines and authentic souvenirs, as well as enjoy the rich cultural and entertaining program. Gathered around stands, experienced wine admirers and some who are yet to get acquainted with exquisite tastes of wines by old masters from Sremski Karlovci sampled Merlot, Cabernet, Riesling and young Portuiguiser. Nevertheless, Bermet, pride and joy of local winemakers, the authentic desert wine of this region, dominated.

Ethno Festival – Indjija

The event is held in June in the pedestrian zone of the municipality. It brings large number of exhibitors from Indjija and surrounding area who are given the opportunity to present and offer traditional food, drinks, souvenirs, crafts and traditional trades. Visitors have the opportunity to see the exhibition of handicrafts and souvenirs, to taste traditional dough and pastries of Srem, as well as to enjoy the rich cultural and artistic program. Manifestation is organised by Ethno-Art in June. It is also an example of event based tourism that is involving local community which is eager to participated in organising and taking part in these manifestations. Cooperation among the municipalities with similar programme is certainly and added values of the Region as destination for event based tourism.

*Detailed tourism potential of the Region in terms of tourism supply is presented in **Annex II Tourism Resources Inventory – Attractions and Facilities**, as part of this Research Study.*

› *Tourism Stakeholders*

The support of tourism stakeholders is essential for the development, successful operation, and long term sustainability of tourism. Tourism stakeholders include many different types of groups depending on their influence, area of business, possibilities of cooperation and geographical area. However, not all stakeholders have the same level of interest in sustainable tourism development and may be less active or not active at all. Moreover, some stakeholders are more important than others in determining the success of activities. The primary data collection involved all five municipalities of the region and focused on primary targeted of stakeholders, excluding the national and international level with regards to the needs of the project activities and guidelines of contracting authority. Data were analyzed using content analysis. The study found several major groups of stakeholder to the implementation of the sustainable tourism development: governmental organizations (tourism organizations, local councils, and government departments), associations (chambers of commerce, civil society organizations) and souvenir suppliers and d handicrafts in local community organizations. The results validate the use of stakeholder theory as a mean to understand stakeholders' point of view, goals and issues in the implementation of sustainable tourism development.

*Detailed Stakeholder list of the Region is presented in **Annex I Tourism Resources Inventory – Municipalities and Stakeholders**, as part of this Research Study.*

City/Municipality	Stakeholder		Area of influence
NOVI SAD	1	CITY ADMINISTRATION	<i>Legislation, permits, strategic and urban planning, promotion</i>
	2	TOURISM ORGANISATION NOVI SAD	<i>Promotion, tourism product development, strategy</i>
	3	PANACOMP TRAVEL AGENCY	<i>tourism product development, receptive tourism</i>
	4	TOURISM ORGANISATION VOJVODINA	<i>Promotion, tourism product development, strategy - Province</i>
	5	EDUCATIONAL CENTRE	<i>Capacity building, education, networking, promotion</i>
	6	CLUSTER ISTAR 21	<i>Networking, cooperation, strategy, policy making</i>
BACKA PALANKA	7	CITY ADMINISTRATION	<i>Legislation, permits, strategic and urban planning, promotion</i>
	8	TOURISM ORGANISATION	<i>Promotion, tourism product development, strategy</i>
	9	FIJAKER TRAVEL AGENCY	<i>tourism product development, receptive tourism</i>
BEOČIN	10	CITY ADMINISTRATION	<i>Legislation, permits, strategic and urban planning, promotion</i>
	11	BEOCIN MONASTERY	<i>Tourism product development, strategy, local community</i>
SREMSKI KARLOVCI	12	CITY ADMINISTRATION	<i>Legislation, permits, strategic and urban planning, promotion</i>
	13	TOURISM ORGANISATION	<i>Promotion, tourism product development, strategy</i>
	14	NATURE MOVEMENT	<i>Networking, cooperation, ecology, education, policy making</i>
INDJIJA	15	CITY ADMINISTRATION	<i>Legislation, permits, strategic and urban planning, promotion</i>
	16	TOURISM ORGANISATION	<i>Promotion, tourism product development, strategy</i>
	17	AGENCY FOR RURAL DEVELOPMENT	<i>Expertise, cooperation, support, policy making, education</i>

Table 5. Tourism Stakeholder Analysis in FGDR

› *Visitors and Tourism Demand*

The Republic of Serbia in the 2006 was visited by 2.079.643 tourists who have made a total of 6.484.702 overnight stays. The vast majority of tourist activity recorded is by local guests with 72.3% of overnight stays, while the share of foreign tourists amounted to only 23.7%. Stays of domestic tourists was longer and lasted an average of 3.7 days, while the average foreigner in Serbia spent 2.2 days. Vojvodina in the same year visited by 296.360 tourists, who have made total of 758.981 overnight stays. Share of 14.25% of all tourists who visited Serbia decided to visit Vojvodina, and they recorded 11.70% of all overnight stays in the country. The average stay in Vojvodina of foreign visitors, as in the case of national average, was shorter and averaged 2.7 days for domestic and 2.4 days for foreigners. South Backa District, which administratively belongs to Fruska Gora Danube Region in 2012 recorded 127.077 visits by tourists, who spent the total of 262 992 overnight stays while FGDR accounted for 119.422 visitors and 240.946 of overnight stays.

Fruska Gora Danube Region 2012

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS			AVERAGE	
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Dom.</i>	<i>For.</i>
Serbia	2.079.643	1.269.676	809.967	6.484.702	4.688.485	1.796.217	3,7	2,2
Vojvodina	296.360	173.465	122.895	758.981	462.672	296.309	2,7	2,4
South Backa District	127.077	57.960	69.117	262.992	102.947	160.045	1,8	2,3
FGDR	119.422	51.363	68.059	240.946	84.485	156.461	1,7	2
% of Serbia	5,74%	4,05%	8,40%	3,72%	1,80%	8,71%	/	/
FGDR* *Petrovaradin	10.653	5.002	5.651	20.104	8.274	11.830	1,7	1,9
% of Serbia	0,51%	0,39%	0,70%	0,31%	0,18%	0,66%	/	/

Table 6. Tourism demand in certain regions of Serbia and FGDR in 2012

Analysing the share of tourism in the FGDR and total turnover on national level, we conclude that the FGDR accounted for share of 5.74 % of the total number of tourists, and they made share of 3.72% of total overnight stays.

Tables 6-12 presented below show the analysis of FGDR, FGDR* with Petrovaradin and municipalities separately.

Novi Sad 2012

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS			AVERAGE	
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Dom.</i>	<i>For.</i>
Novi Sad	108.769	46.361	62.408	220.842	76.211	144.631	1,6	2,3
% of FGDR	91,08%	90,26%	91,70%	91,66%	90,21%	92,44%	/	/
Petrovaradin	5.244	1.962	3.282	10.447	3.634	6.813	1,9	2,1
% of FGDR*	49,22%	39,22%	58,08%	51,96%	43,92%	57,59%	/	/

Table 7. Tourism demand in Novi Sad in 2012

Bačka Palanka 2012

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS			AVERAGE	
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Dom.</i>	<i>For.</i>
B. Palanka	2061	835	1226	4710	1621	3089	1,9	2,5
% of FGDR*	19,35%	16,69%	21,70%	23,43%	19,59%	26,11%	/	/

Table 8. Tourism demand in B. Palanka in 2012

Beočin 2012

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS			AVERAGE	
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Dom.</i>	<i>For.</i>
Beočin	304	275	29	653	599	54	2,2	1,9
% of FGDR*	2,85%	5,50%	0,51%	3,25%	7,24%	0,46%	/	/

Table 9. Tourism demand in Beočin in 2012

Sremski Karlovci 2012

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS			AVERAGE	
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Dom.</i>	<i>For.</i>
Sr. Karlovci	218	182	36	326	273	53	1,5	1,5
% of FGDR*	2,05%	3,64%	0,64%	1,62%	3,30%	0,45%	/	/

Table 10. Tourism demand in Sr. Karlovci in 2012

Indjija 2012

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS			AVERAGE	
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Dom.</i>	<i>For.</i>
Indjija	2826	1748	1078	3968	2147	1821	1,2	1,7
% of FGDR*	26,53%	34,95%	19,08%	19,74%	25,95%	15,39%	/	/

Table 11. Tourism demand in Indjija in 2012

FGDR and municipalities ratio*

TERRITORY	TOURISTS			NUMBER OVERNIGHT STAYS		
	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>	<i>Tot.</i>	<i>Dom.</i>	<i>For.</i>
Petrovaradin	49,22%	39,22%	58,08%	51,96%	43,92%	57,59%
B. Palanka	19,35%	16,69%	21,70%	23,43%	19,59%	26,11%
Indjija	26,53%	34,95%	19,08%	19,74%	25,95%	15,39%
Beočin	2,85%	5,50%	0,51%	3,25%	7,24%	0,46%
Sr. Karlovci	2,05%	3,64%	0,64%	1,62%	3,30%	0,45%
TOTAL	100%	100%	100%	100%	100%	100%

Table 12. Tourism ration of municipalities in FGDR in 2012*

3. STRATEGIC PLAN RECOMMENDATIONS

›Tourism development strategy

Basis of strategic proposal is based on current situation analysis of potentials of tourism development. Major potentials within the region may be classified as following:

1. Rural and agricultural characteristics of the Region
2. Nature resources, forests, and nature protected areas, geo heritage
3. Cultural and historical heritage
4. Events, manifestations and gastronomy

With regards to the tourism product development two key approaches with high potential of new complementary tourism products have been identified:

I	RURAL AND AGRITOURISM	
	Justification	Target group
	<ul style="list-style-type: none"> › FGDR predominated rural agricultural area › Eco and organic food in the area › Gastronomic events and manifestations › Rural accommodation › Visitors preferences › Competitive advantage › Diversification of Tourism product 	<ul style="list-style-type: none"> › Mainly foreign tourists <ul style="list-style-type: none"> › Youth › Elderly › Families › Organised groups › Corporate
II	ECOTOURISM AND ADVENTURE TOURISM	
	Justification	Target group
	<ul style="list-style-type: none"> › FGDR nature resources and protected areas › Cultural and historic heritage › Active local community <ul style="list-style-type: none"> › Terrain › Visitors preferences › Competitive advantage › Diversification of Tourism product 	<ul style="list-style-type: none"> › Domestic and foreign tourists <ul style="list-style-type: none"> › Youth › Elderly › Families › Nature lovers › Organised groups › Corporate

Table 13. Strategic Plan Recommendations

›Key determinants of future activities

Education

- › Increasing the level of education and human resources capacities in the development and operation of tourist activities at the local level (specialised education of the local population)
- › Raising absorption capacities of EU and other funding
- › Development of internationally competitive and certified tourism services

Cluster and networking

- › Initiative of cluster development and establishing partnerships between individual tourism service providers
- › Development of procedures of information flow between key stakeholders and tourism service providers
- › Establishment of tourism organisation or association of the Region
- › Considering the possibility of developing Fruska Gora Danube Region without urban area of Novi Sad

Promotion

- › The establishment of the internet based tourist portal network with the launch of the offer or the destination and the possibility of operating over a network
- › Preparation of the visual identity design of the destination with emphasis of Fruska Gora National Park and eco-agri-rural lifestyle in the Region

LIST OF REFERENCES AND USEFUL LINKS

- › *Master plan razvoja turizma Sremskih Karlovaca sa Fruškom Gorom*

- › *Master plan održivog razvoja Fruške gore 2012 - 2020*

- › *Opštine i regioni u Republici Srbiji 2013*

- › *Strateški plan razvoja opštine B. Palanka 2011 - 2016*

- › *Profil zajednice Beočin*

- › *Profil zajednice Indjija*

- › *Profil zajednice Novi Sad*

- › *Marketing strategija turizma Vojvodine*

- › *Possibilities of improvement of rural tourism in Fruska Gora, Sandra Medić, University of Novi Sad, Faculty of Sciences*

- › *The role of agritourism in innovative rural development of lower Danube region in Serbia*

- › *The role of agritourism in innovative rural development of lower Danube region in Serbia*

- › *Razvoj avanturističkog turizma kao posebnog oblika ruralnog turizma na području NP Fruška gora*

- › *The Ekoturizam u funkciji diverzifikacije ruralne ekonomije na području Nacionalnog parka Đerdap region in Serbia*

- › *Tools and processes: Situational, Operational and Human Resources Analysis for SMEs in Tourism Industry*

- › *www.novisad.rs*

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