



**Sustainable Transport and Tourism  
along the Danube**  
[www.transdanube.eu](http://www.transdanube.eu)

**STATUS QUO / STATE OF THE ART  
TRANSNATIONAL RESULTS**



**WP 3 / Action3.2**

**ERDF PP2 Regional Government of Burgenland**

**12/04/2013**



Jointly for our common future

## IMPRESSUM – CONTACTS

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We would like to thank all project partners who supported us with their feedback and professional input!

More information about TRANSDANUBE and the project activities & results are available at [www.transdanube.eu](http://www.transdanube.eu)

## Table of Contents

IMPRESSUM – CONTACTS .....	2
1 EXECUTIVE SUMMARY .....	4
2 INTRODUCTION .....	6
3 RESULTS OF REGIONAL SWOT-ANALYSES .....	8
3.1 TRANSPORT.....	8
3.1.1 <i>Strengths</i> .....	8
3.1.2 <i>Weaknesses</i> .....	9
3.1.3 <i>Opportunities</i> .....	9
3.1.4 <i>Threats</i> .....	10
3.2 TOURISM.....	11
3.2.1 <i>Strengths</i> .....	11
3.2.2 <i>Weaknesses</i> .....	11
3.2.3 <i>Opportunities</i> .....	12
3.2.4 <i>Threats</i> .....	13
3.3 PLANS/STRATEGIES/PROJECTS AND ORGANISATIONAL AND FINANCIAL FRAMEWORK.....	14
3.3.1 <i>Strengths</i> .....	14
3.3.2 <i>Weaknesses</i> .....	14
3.3.3 <i>Opportunities</i> .....	15
3.3.4 <i>Threats</i> .....	16
4 RESULTS OF REGIONAL STATE OF THE ART ANALYSES.....	18
4.1 SOFT MOBILITY OFFERS AND PACKAGES – FACTORS OF SUCCESS .....	20
4.1.1 <i>Overview</i> .....	20
4.1.2 <i>Detailed list of success factors</i> .....	21
4.2 TRANSPORTATION AND TOURISM INFORMATION SYSTEMS – SUCCESS FACTORS .....	23
4.2.1 <i>Overview</i> .....	23
4.2.2 <i>Detailed list of success factors</i> .....	24
4.3 CONCEPTS AND STRATEGIES .....	25
4.3.1 <i>Overall strategies and plans</i> .....	25
4.3.2 <i>Marketing strategies</i> .....	26
5 INDEX OF FIGURES .....	27

## 1 EXECUTIVE SUMMARY

### **A region with great potential....**

With its vast natural and cultural heritage and its geopolitical position on the crossroads of several Pan European Corridors, the Danube region is one of the most promising tourism destinations in Europe. Strategies on the macro level (European Strategy for the Danube Region) as well as on the regional level try to address this opportunities in different ways. In order to create an added value from the increasing demand for eco-touristic and cultural touristic products as well as the increasing awareness for sustainable transport, adequate sustainable tourism products including sustainable mobility offers have to be provided.

Cooperation between stakeholders between the transport and the tourism sector, within and between regions especially across-borders are the key for an integrated, sustainable development. Funding schemes on the regional the national and the European level should secure that good projects receive adequate financial resources to get them started and to secure operation over a longer period of time.

### **... significant differences and challenges ...**

Strengths and weaknesses in the transport and the tourism system still vary widely throughout the Danube region. While the extent of the existing public transport system in the regions along the Danube has been identified as strength, the quality of services provided is weak especially in the lower sections of the Danube. Decreasing numbers of public transport passengers coincide with a still growing popularity of private car usage. Going along with this trend is a strong focus on improving the existing road infrastructure, while there is a lack of funds for the improvement and maintenance of the rail infrastructure.

The negative consequences of growing road transport (congestions, noise, emissions, etc.) and the expansion of land use for settlements, business zones or renewable energy production even in nature protection areas are indicators for the conflict between the interest for further economic growth and the necessity to protect natural resources (amongst others for sustainable tourism). Besides the construction of new transport infrastructure, the more efficient usage of the existing infrastructure provides potentials for further development. For that up-to-date (real-time) information and services are crucial.

Good infrastructure and services for cyclists resulted in constantly growing number of cycling tourists especially between Passau and Bratislava. Because of a lack of adequate (cross-border) bicycle routes, the regions of the lower Danube area couldn't benefit from this development in the same way.

Besides cyclists on the Eurovelo 6, the increasing number of tourists traveling along the Danube on cruise ships offers an opportunity for the regions to attract solvent tourists to visit their regions. Neither the infrastructure nor the services allows the exploitation of these potentials at the moment. Improvements of port facilities as well as the development of new services (e.g. hop on hop off services for young people, etc.) provide potentials to attract more tourists to visit the regions along the river and its hinterland. In order to generate a real added value, the tourist packages have to allow tourists to stay longer than just a few hours in the region.

### **... where cooperation plays a key role...**

On the organization level a lack of adequate bodies to coordinate the public transport systems within the regions has been identified. Even in the more advanced regions in the upper reaches of the Danube a lack of cross-border cooperation in the field of public transport coordination limits the unrestricted usage of the sustainable mobility offers along the Danube. There is also room for improvement as far as the cooperation between stakeholder from the transport and the tourism sector (within the regions as well as on the cross-border level) is concerned. In the tourism sector destination management institutions provide structures which could improve the cooperation between the stakeholders in the tourism sector.

By fostering cooperation instead of competition it should be possible to create an added value resulting from sustainable tourism for all regions along the most international river of the world.

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**...for further sustainable development.**

Still, the opportunities of the Danube aren't used adequately. The huge economic and touristic development potential of the Danube should be of benefit for all the regions. For that it is necessary to improve the accessibility and facilitate the concept of sustainable tourism in the whole Danube region.

The development of sustainable mobility offers will stimulate the shift to environmentally friendly mobility systems resulting in reduced green house gas emissions/pollutants/noise and better transport services for the inhabitants as well as for tourists. This will finally influence the quality of the whole region for economic development and the quality of life for the inhabitants themselves.

## 2 INTRODUCTION

Experiences with and awareness of the benefits of sustainable mobility is different in the regions along the Danube. While the countries on the upper reaches of the Danube have gained experience with the implementation of sustainable transport offers including the knowledge about the strength and weaknesses of these services, the regions in the lower reaches of the Danube still lack of experience. Therefore it is necessary to establish a common basis for the implementation of sustainable transport offers and tourism packages in the Danube region.

It is the objective of Act. 3.2 “State of the Art - Sustainable mobility in tourism” to provide a comprehensive overview about the status quo of transportation and tourism system consolidated in a SWOT and regional/transnational state of the art reports. Different levels of experience on the expert level have to be taken into account as well as the lack of awareness in the broad public.

Besides the existing transport and tourism systems the analysis covers information about

- organisational / legal framework
- financial issues

Due to the limited amount of time and resources, the capitalization of existing results and findings is of major importance. Therefore another focus of the analysis was on the identification and consolidation of existing know-how and expertise in the regions for the project. This was done by the analysis of

- existing development plans (transport/tourism)
- results of previous/running projects

Within the common methodology report (Act. 3.1) the following action plan has been developed:

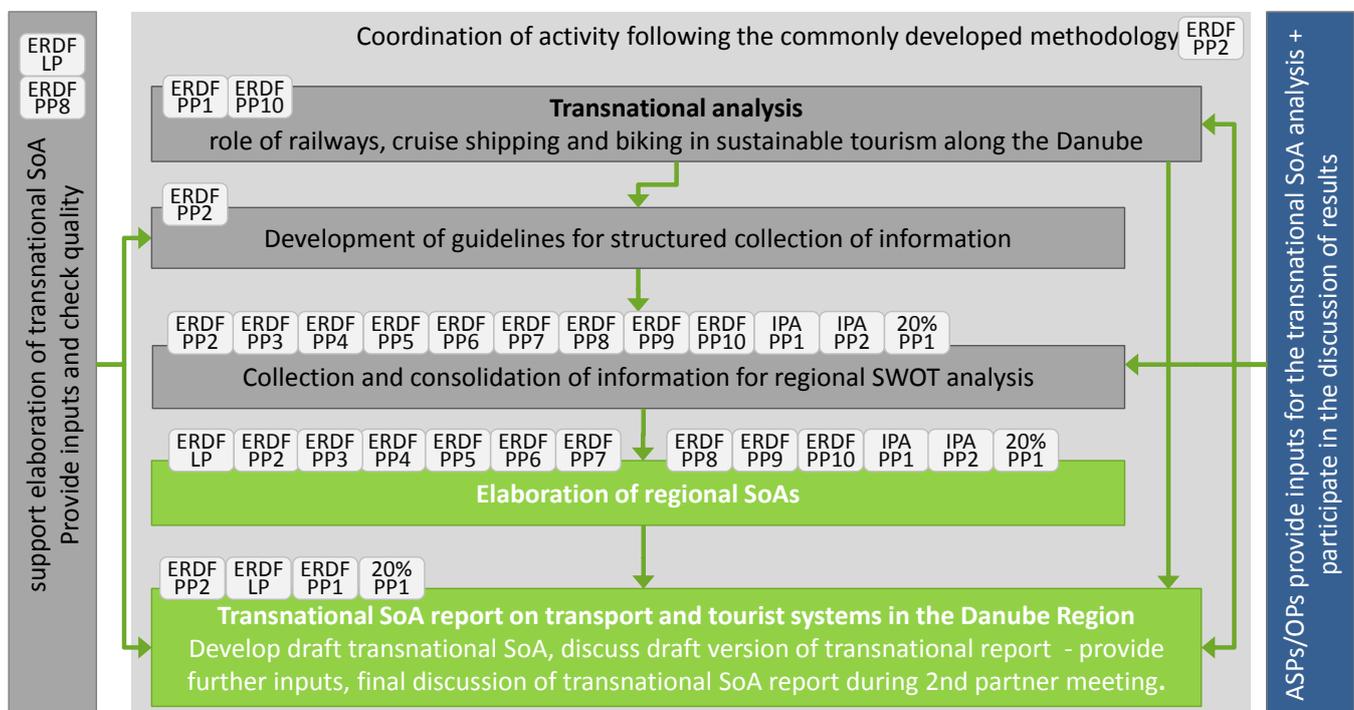


Figure 1: Action plan transnational SoA (source: Transdanube common methodology)

The results of the regional SoA reports elaborated by the project partners for their regions have been summarized in this transnational SoA report. It contains the consolidated results of the regional SWOT analyses and the SoA analyses provided by the project partners.

Further information about the SoA in the Danube region – especially in those areas not covered by the regional reports of the project partners – can be found in the “TRANSNATIONAL REPORT STATE OF THE ART / GOOD PRACTICE” elaborated by PP1 DTC.

Both reports provide profound inputs for the development of sustainable transport offers and packages (Act. 4.2/5.2), as well as to the development of a transport & tourism information system (Act. 5.1) and the development of marketing strategies (Act. 5.3.).

### 3 RESULTS OF REGIONAL SWOT-ANALYSES

As a synopsis of the regional SWOT-analyses of all PPs common strengths, weaknesses, opportunities and threats of the participation regions should be identified in this chapter.

Because of a summarizing view, statements are only considered if at least two PP mentioned them. Whenever there were significant differences between the region along the upper and lower section of the Danube River this will be mentioned. In each subchapter the items are matched with thematic fields to allow a better identification of necessary common fields of activity.

#### 3.1 Transport

##### 3.1.1 Strengths

Most of the identified strengths deal with the public transport: a good public transport system, the existing railway infrastructure and railway connections and services are mentioned. Good bicycle infrastructure and other aspects of bicycle traffic are mentioned more often by regions at Danube's upper section, while regions along the lower sections see port infrastructure and shipping services as their strengths. Beside good international connections, many regions have not mentioned road transport as a special strength.

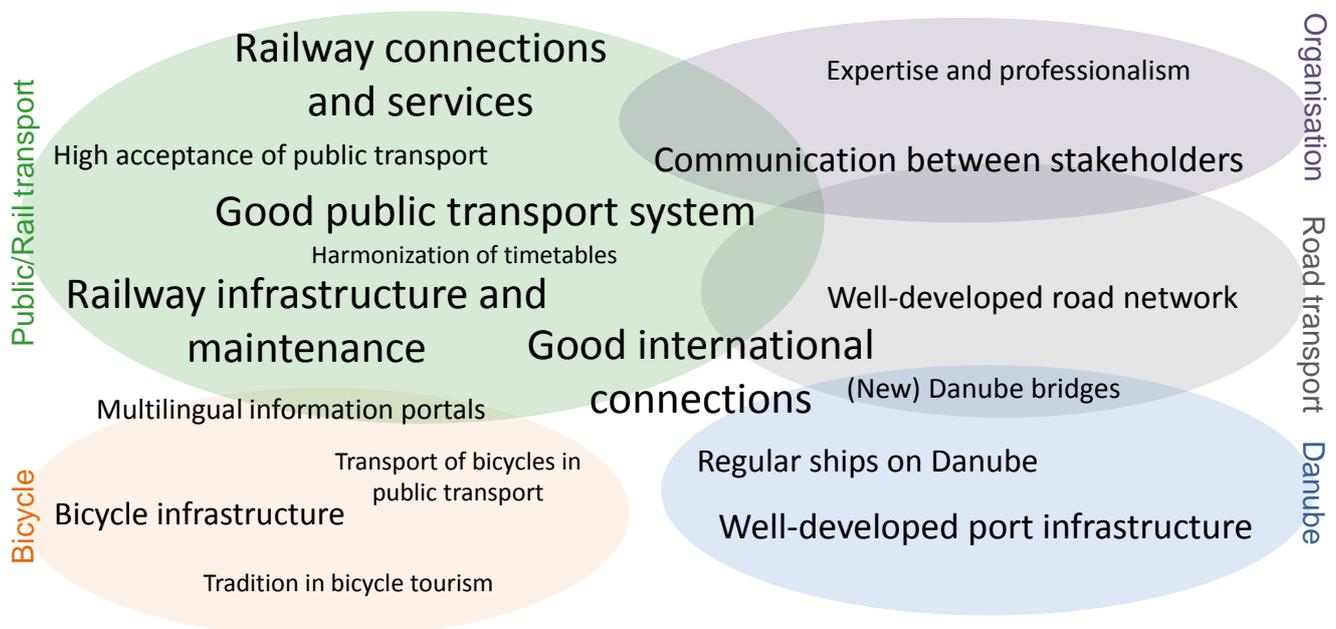


Figure 2: SWOT – Transportation Strengths

### 3.1.2 Weaknesses

Examining the weaknesses, you can see a different pattern. The existing of road infrastructure is one of the most important weaknesses to be tackled: bad road conditions, missing road connections and highways or inadequate connections to international nodes are often mentioned, especially by PPs along the lower section of Danube River.

In the field of public transport the most important weaknesses are the quality of public transport (vehicles, maintenance of stations, information etc.) as well as the condition of the existing railway infrastructure or the lack of electrified railway lines. Many regions agree that the opportunities of the Danube River aren't used in a desirable way. Main organisational problem is a lack of cooperation between the stakeholders.

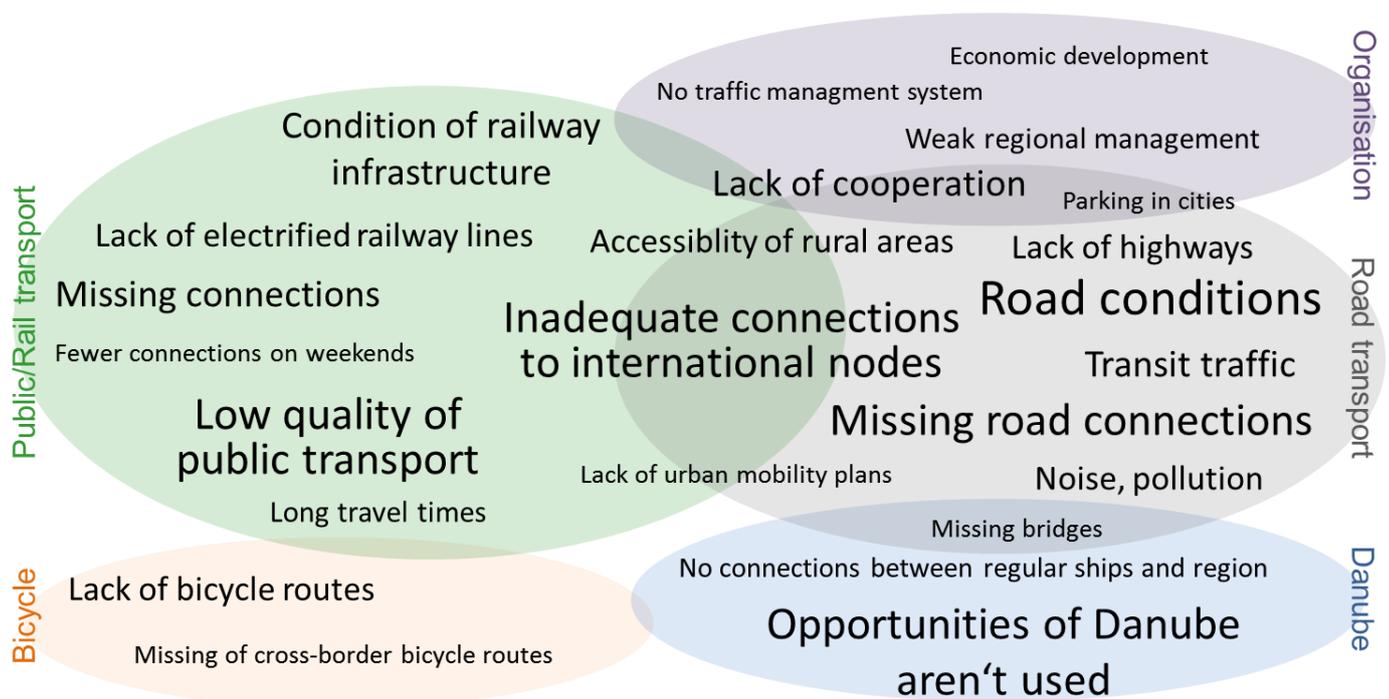


Figure 3: SWOT – Transport Weaknesses

### 3.1.3 Opportunities

Almost all PPs agree on the preferred geo-economic position as a major opportunity for the Danube region. Pan European Corridors in the region offers additional opportunities. Transnational/cross-border projects are seen as opportunities for the development of the transport system. Available funds should facilitate the improvement of road infrastructure.

In the field of public transport the raising awareness for sustainable transport is, along with the creation of new intermodal transportation nodes, seen as an essential chance for the Danube region.

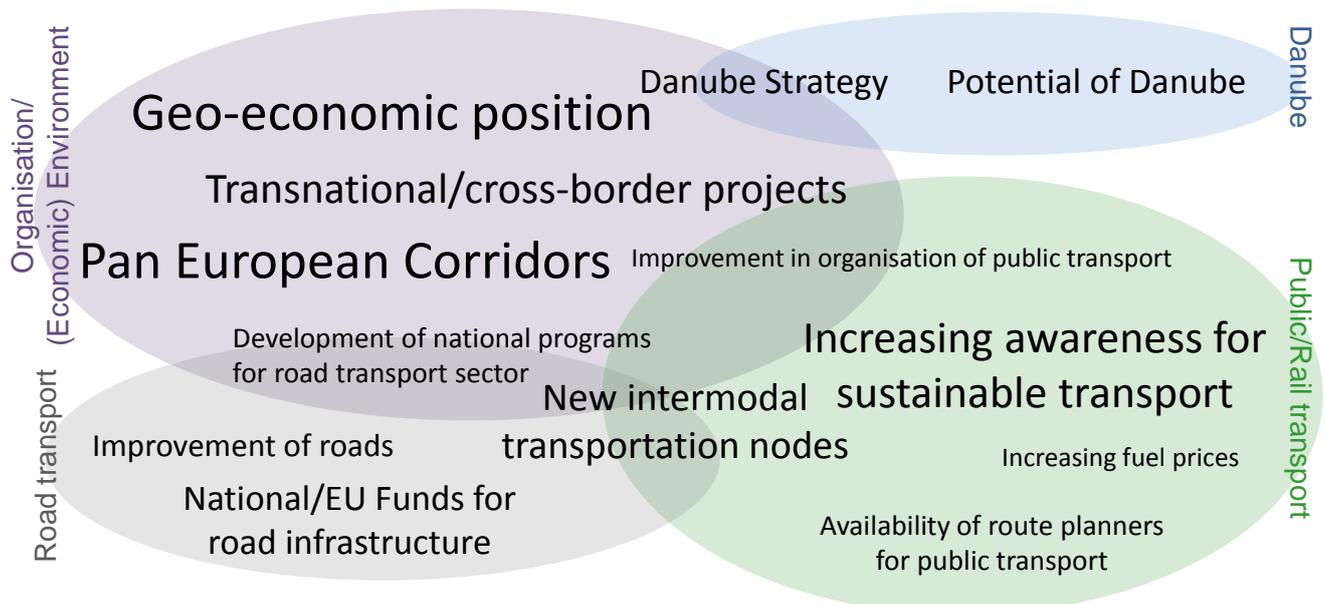


Figure 4: SWOT – Transport Opportunities

### 3.1.4 Threats

Some PPs have identified the popularity of individual transport as a main threat for sustainable mobility. Decreasing numbers of public transport passengers and the lack of coordination by public transport associations are mentioned too. Missing infrastructure (especially missing cross-border connections) or bad condition of national roads is seen as a drawback in international economic competition.

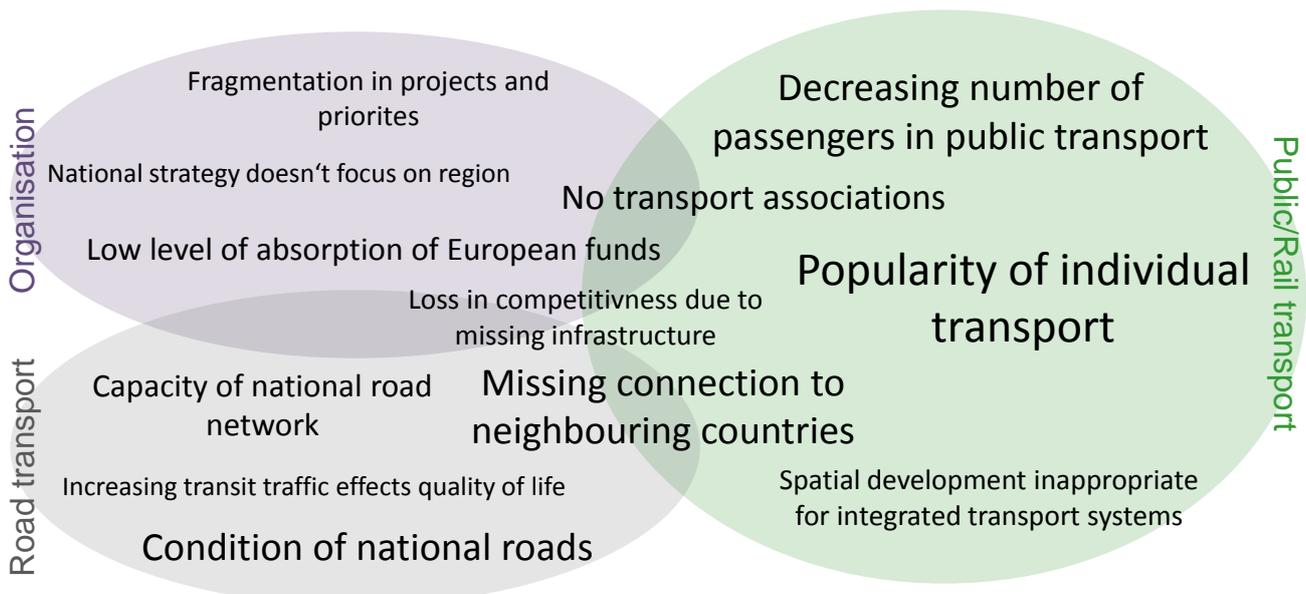


Figure 5: SWOT – Transportation Threats

## 3.2 Tourism

### 3.2.1 Strengths

The dominant strengths, mentioned by all regions, are the valuable natural heritage and the existing national parks and nature preservation areas. Cultural and historic sites and old city centres are also identified as strengths by several PPs.

A diverse offer of accommodation especially in existing touristic centres is also seen an advantage. Only a few regions see a constant touristic demand throughout the year as their strengths.

In the field of organisation and marketing the foundation of TDM organisations or good touristic information via information centres or websites are frequently mentioned strengths. The creation of brands and packages are also seen as advantages.



Figure 6: SWOT – Tourism Strengths

### 3.2.2 Weaknesses

The dominant identified organisational weakness is a lack of cooperation between tourism stakeholders and a missing common marketing strategy. In this context the missing of a common, well-known brand and the promotion of the region at e.g. international fairs has been criticised several times.

The regions along the lower stretch of Danube mentioned training deficits of the tourism staff due to missing educational initiatives. Especially in these regions the quality of accommodation and the missing of high-level accommodation is a problem as well.

Seasonal tourism and also a short duration of stay are well-known weaknesses in many of these regions.

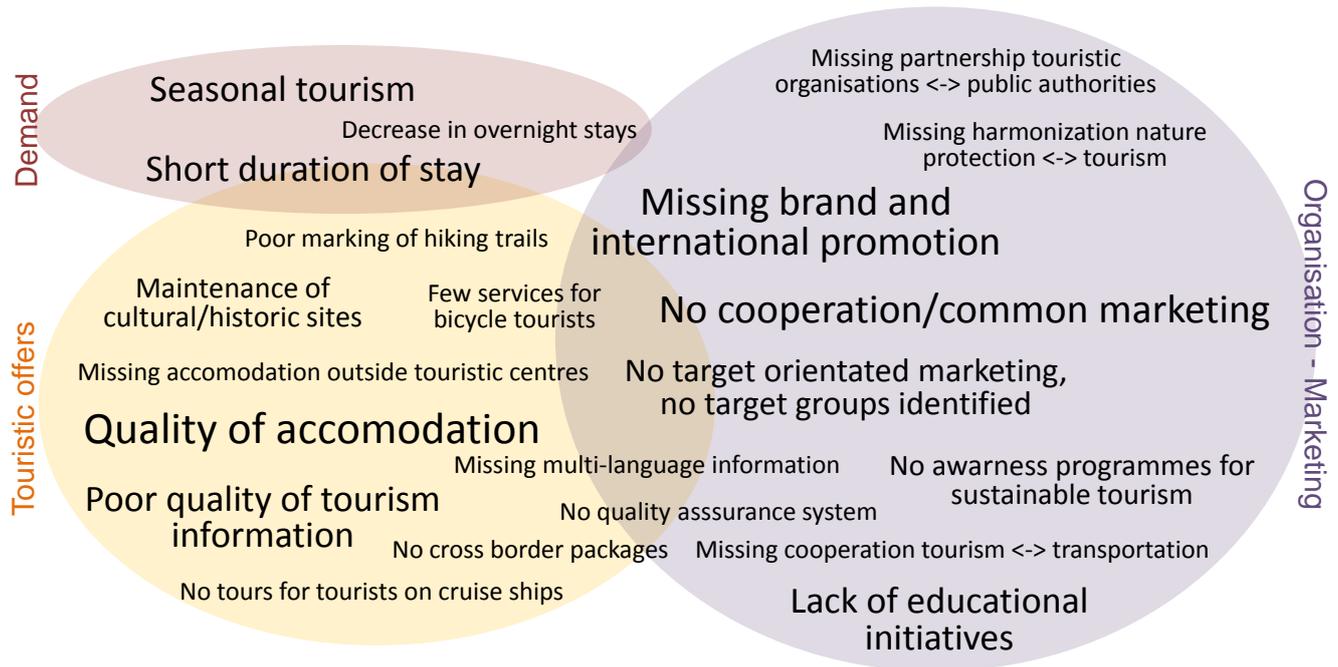


Figure 7: SWOT – Tourism Weaknesses

### 3.2.3 Opportunities

An increasing demands for authentic holidays focusing on regional products, culture and nature preservation has been identified as an opportunity in almost all regions. For regions offering thermal spa and other wellness offers, the increasing health consciousness is an advantage as well. Besides that, cross-border cooperation and the touristic potential of Danube River are repeatedly mentioned opportunities.

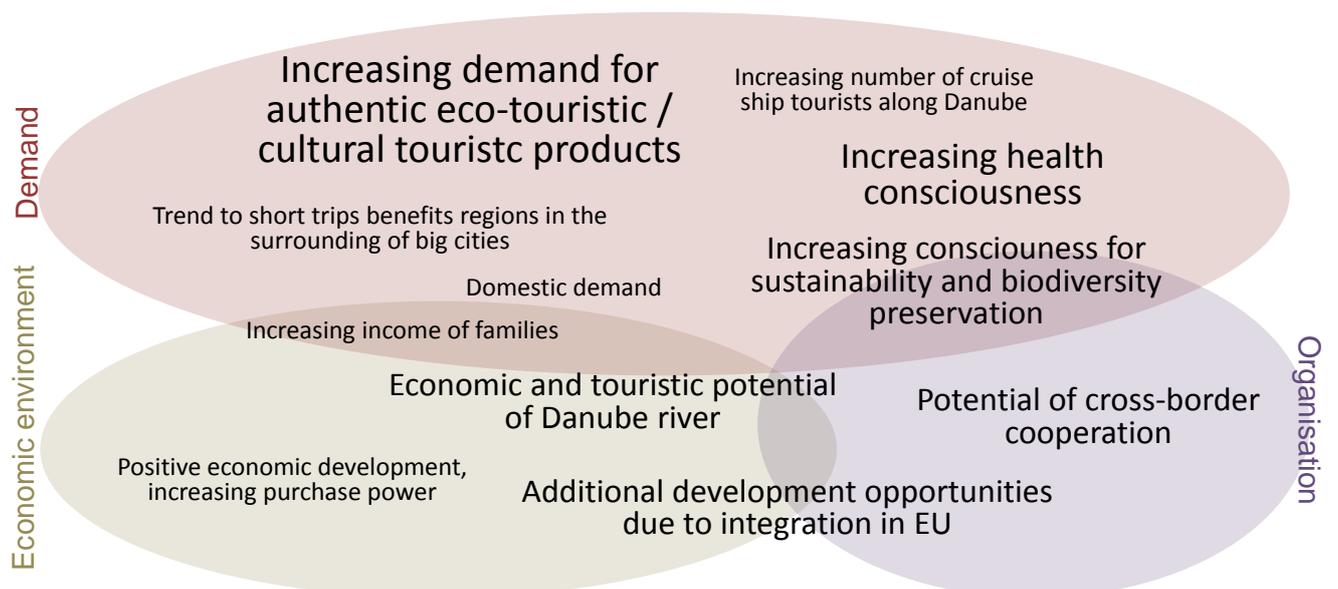


Figure 8: SWOT – Tourism Opportunities

### 3.2.4 Threats

An important threat, mentioned by many of the regions, is the competition with other regions. Comparable or better touristic products and/or cheaper prices are seen as a risk. Changes in demand, caused by the economic crisis or by rising expectations, are also often seen as a threat.

Another area of conflict is the relationship between touristic and economic development and nature protection along with missing awareness for sustainable development by some stakeholders.

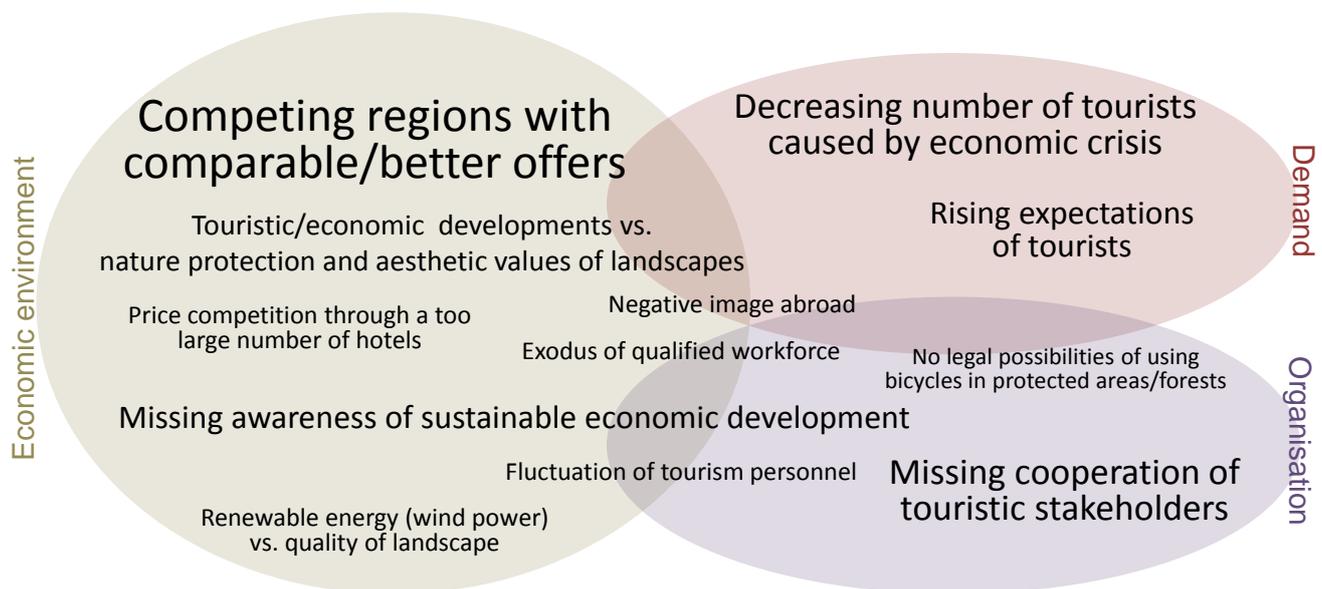


Figure 9: SWOT – Tourism Threats

### 3.3 Plans/Strategies/Projects and organisational and financial framework

When summarizing the results of the SWOT analyses in the field of „Development documents/previous projects“ and “Organisational and legal framework, financial sources” it quickly became clear that the items mentioned by the partners in these two different sections are very similar. That’s why it has been decided to merge the two sections for the transnational summary into one.

#### 3.3.1 Strengths

The dominating strength resulting from the implementation of previous projects was the establishment of well-functioning cross-border cooperation networks. An active role in the projects, early interest in sustainable mobility offers and (infrastructural) improvements are seen as further strengths in many regions.

Several regions can build their activities on already existing regional or national strategic documents, sometimes including a focus on sustainable mobility.

What should be mentioned is that the important area of financing in most cases doesn’t seem to be covered by adequate funding schemes in the regions.

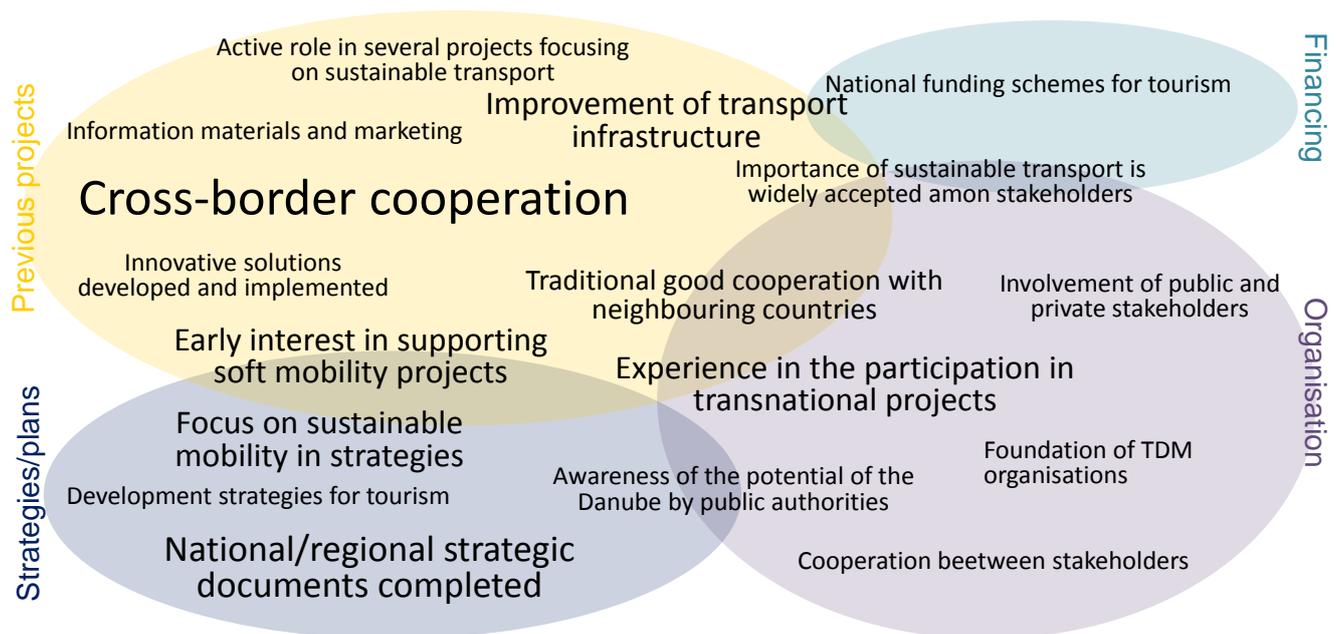


Figure 10: SWOT – Organizational/financial/administrative aspects - Strengths

#### 3.3.2 Weaknesses

The number of listed weaknesses is higher compared to the strengths for almost any region. The mentioned weaknesses vary between the regions; only few are mentioned by a larger number of regions.

The field of financing is definitely a very important one. The low rate of absorption of existing funds and sources or insufficient local co-financing resources has been criticised. A deficit in organisation is once more the missing cooperation, especially between the tourism and transportation sectors.

Some regions see problems in development plans, which are not considered or have too general or illusory objectives.

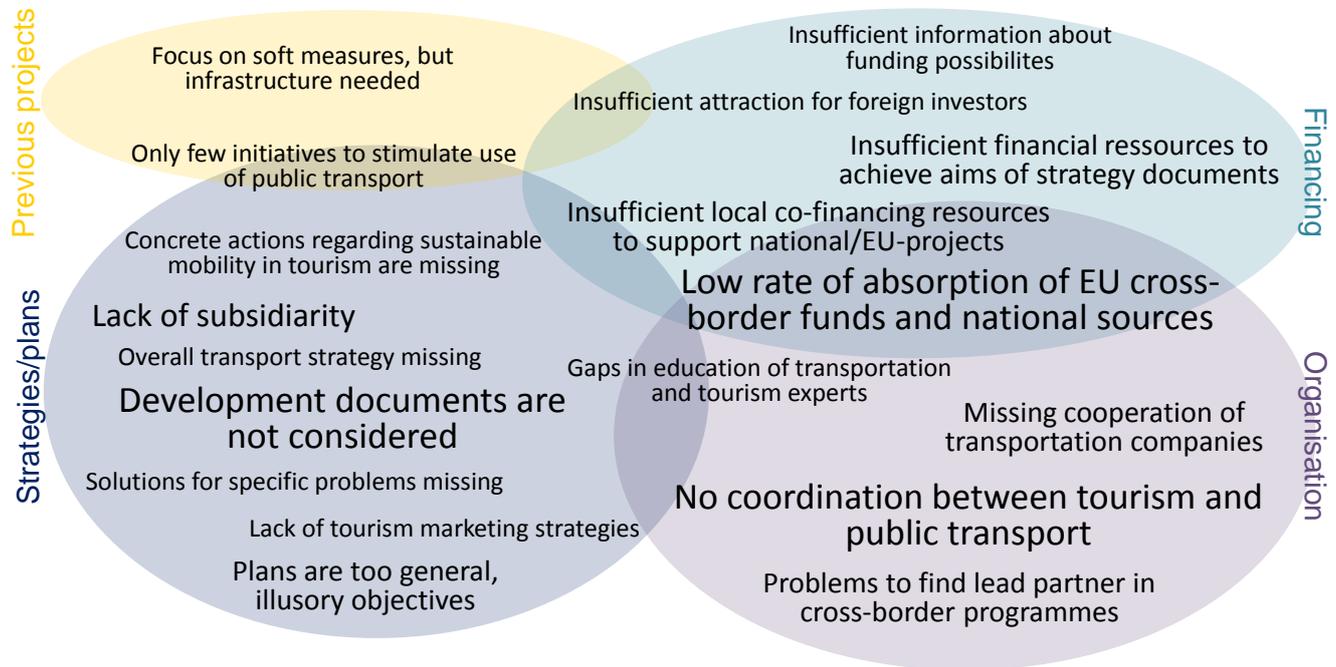


Figure 11: SWOT – Organizational/financial/administrative aspects - Weaknesses

### 3.3.3 Opportunities

While the regions are aware of several opportunities, no clear picture could have been deduced from the mentioned items. Some regions mentioned new financing options, e.g. for international transport infrastructure as an opportunity. Cooperation potentials for example in form of transport associations or as partnership of NGOs, SMEs and local governments, have also been identified as opportunities.

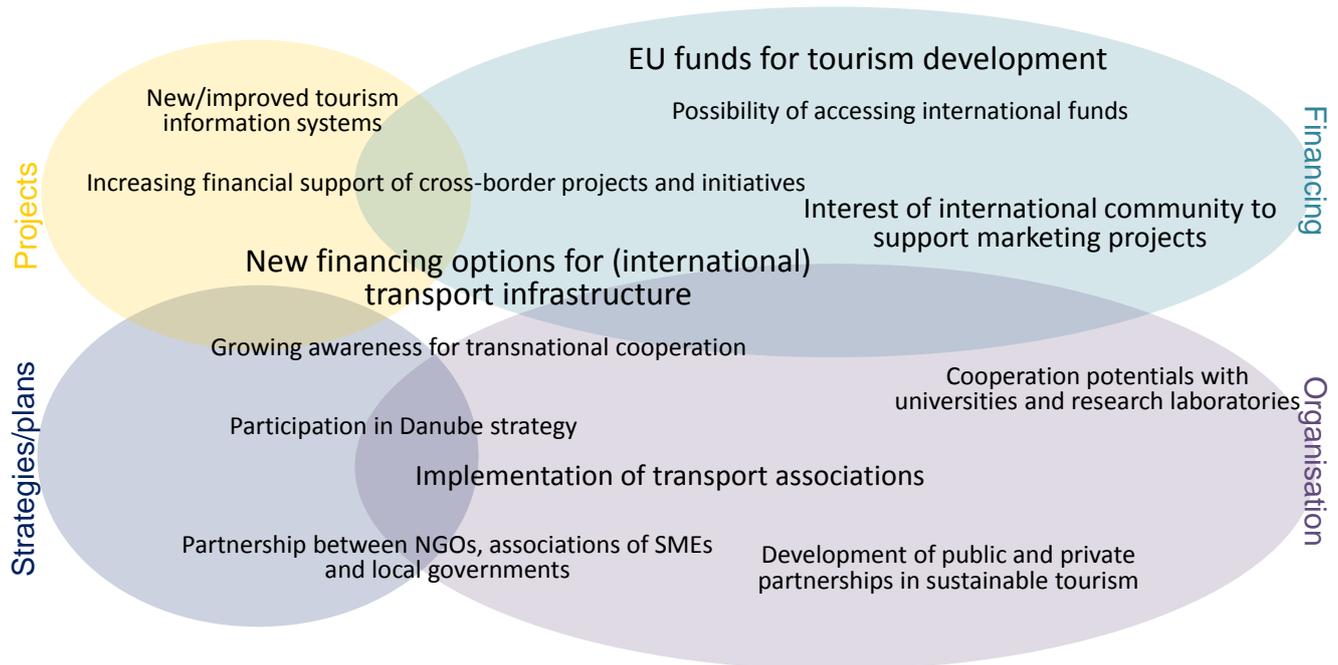


Figure 12: SWOT – Organizational/financial/administrative aspects - Opportunities

### 3.3.4 Threats

As for the opportunities, the list of threats mentioned by the regions is very diverse. Only few similarities could have been identified.

Many threats can be allocated to the area of financing. Changes in the funding-regime of the European Union, budget restrictions of regional or national authorities and also low interest of private investors are mentioned here.

Slow administration, delays in legislative processes or unsuccessful national development strategies have been identified as further threats for the regions.

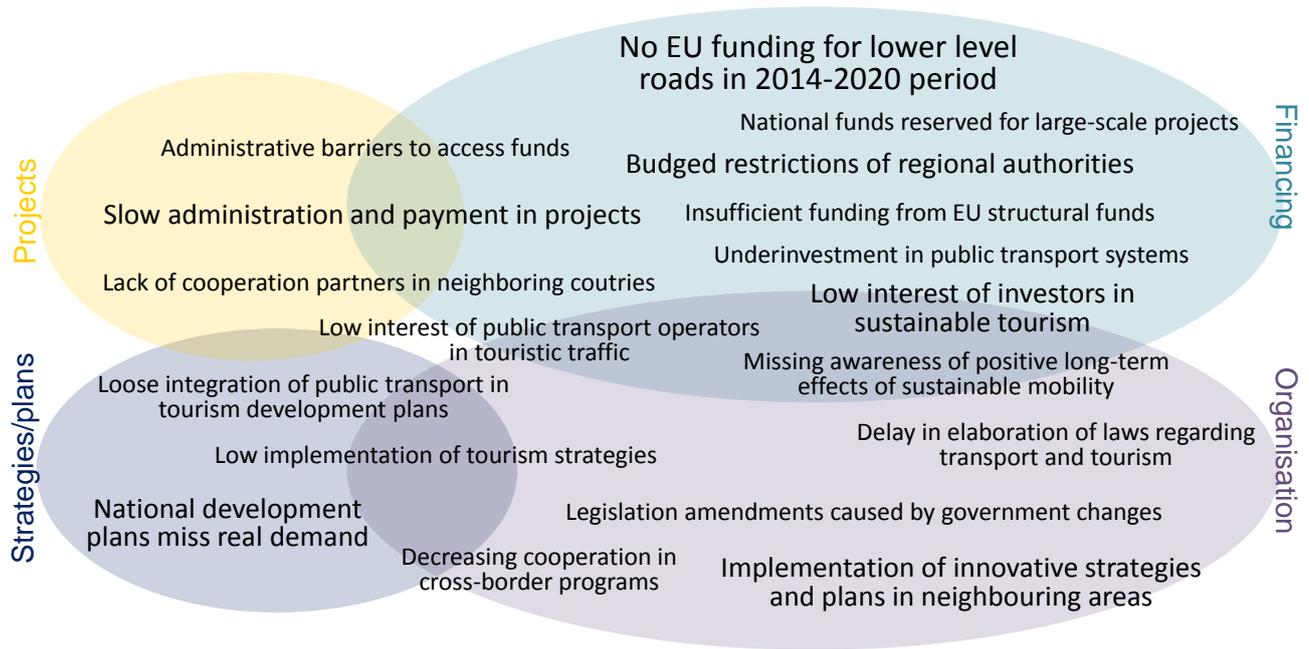


Figure 13: SWOT – Organizational/financial/administrative aspects - Threats

## 4 RESULTS OF REGIONAL STATE OF THE ART ANALYSES

As a synthesis of the regional Status Quo / SWOT-analysis and the good practice-collection the PPs were asked to identify overall success factors in the current practice of the development and implementation of mobility offers and packages, strategies as well as the respective framework conditions (legal, financial, etc.).

These consolidated findings of the previous steps can be seen as a guideline for the development of sustainable mobility offers and packages in tourism in the project Transdanube and beyond.

The consolidation of the regional SoA-analyses is taking into account the different topics defined in the guidelines (Soft mobility offers and packages, transportation and tourism information systems and strategies & plans). The success factors for these topics have been structured with the help of different categories. In summary these categories cover the most important components to be taken into account when planning and implementing mobility offers, packages, information systems or strategies. Figure 14 indicates these components and the interrelation between them.

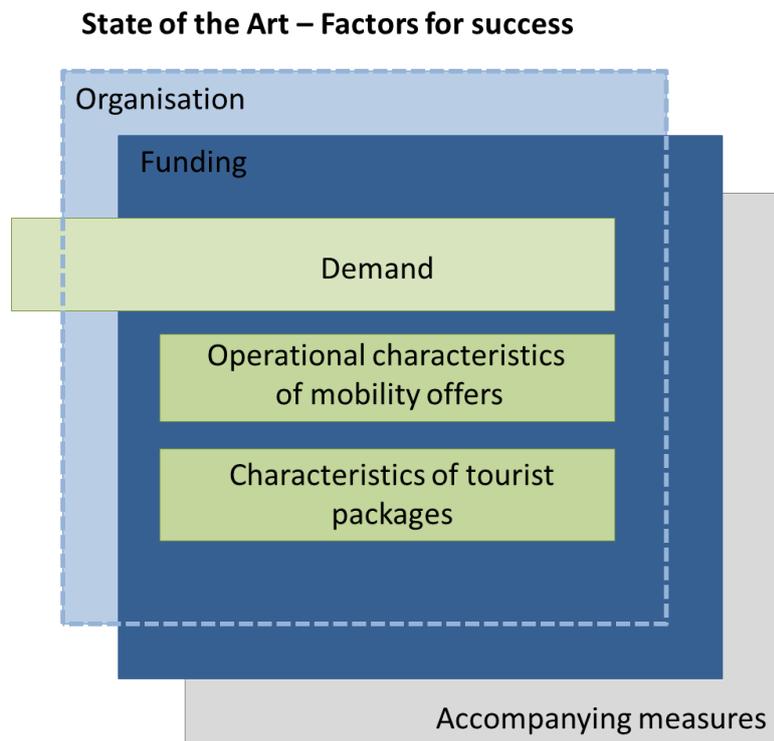


Figure 14: Examined fields of action in the SoA-analysis

The core elements of a sustainable mobility offer or a package are the (operational) characteristics (e.g. the area covered, the operating time and frequency). A component which has a major influence on these characteristics is the demand of the target group. The organizational framework has to reflect the local situation. One of the most important framework conditions are the existing funding options. Both components have a major influence on the characteristics of an offer, but can be just partly controlled by the stakeholders involved on the

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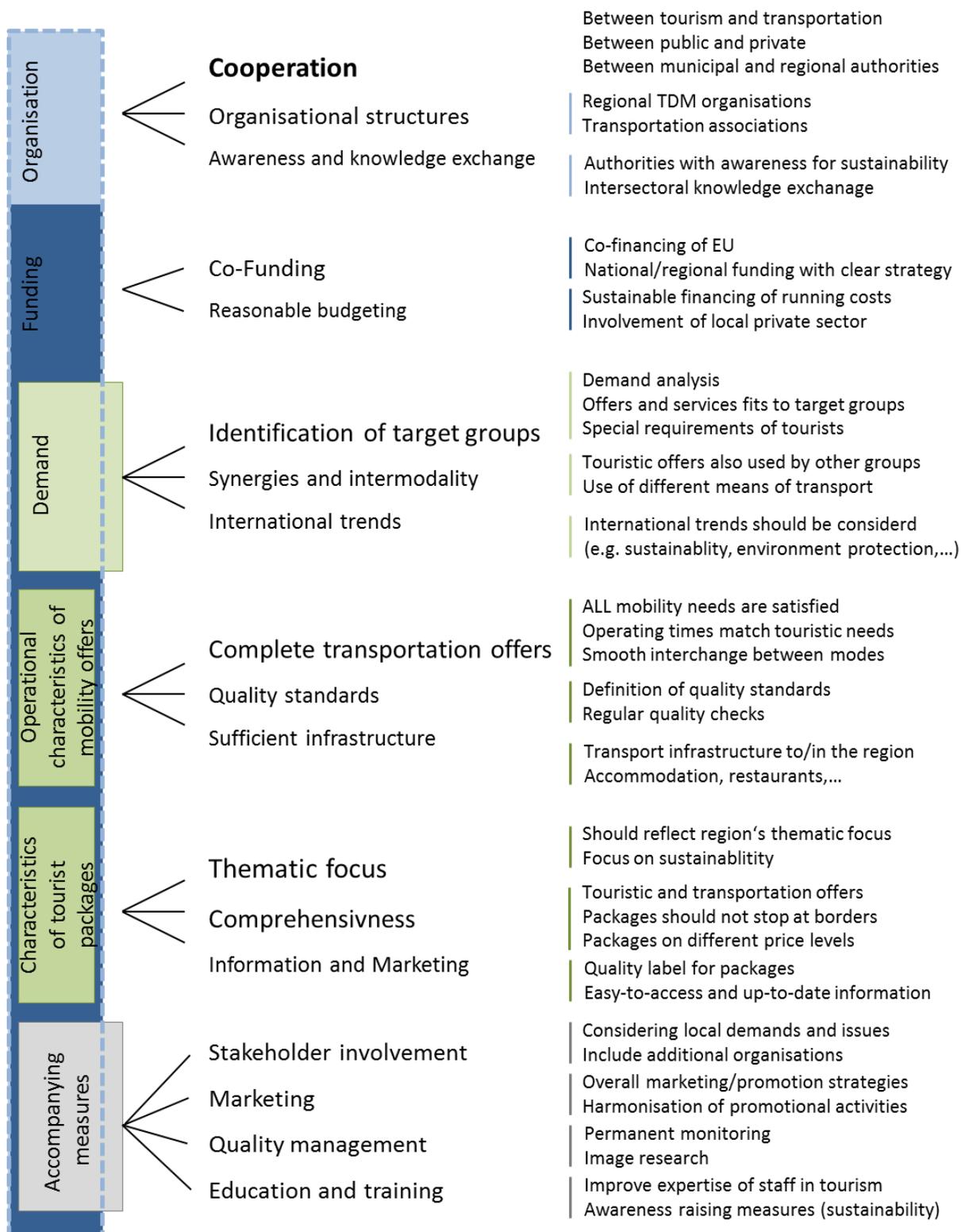
local level. In order to guarantee a smooth implementation accompanying measures (marketing, monitoring, etc.) have to be taken into account.

For all three topics – soft mobility offers and packages / transportation and tourism information systems / concepts and strategies – an overview on the most important (number of appearances in the partner reports) factors of success is given in a figure. A selection of the most important statements in the regional SoA reports of the PP's is listed afterwards.

The transnational SoA report comes up with overall success factors for e.g. the development and implementation of soft mobility offers and packages. For more detailed information about the single success factors (e.g. when developing a bus shuttle) the good practice catalogue (Output Act. 3.3) will provide a valuable source of information. In any case these success factors must always be reflected on the framework conditions in your region.

## 4.1 Soft mobility offers and packages – factors of success

### 4.1.1 Overview



#### 4.1.2 Detailed list of success factors

##### Operational characteristics of mobility offers

- All mobility needs (no partial needs/legs of journey) have to be satisfied by sustainable transport
- Operating times have to match touristic needs (e.g. availability on weekends)
- Services should be provided all over the year if reasonable
- Foster intermodal transport chains by offering smooth linkage between different modes of transport
- Realization of complementing elements of the infrastructure (bicycle storage, P&R, etc.)
- Cross-border, cross-county and cross-regional mobility offers
- More efficient services through cooperation of operators and organisations
- Transnational quality standards and regular quality checks
- Continuous improvement of existing services

##### Characteristics of tourist packages

- Sustainable transport as an integral component of sustainable tourist packages (arrival, departure, on-site mobility)
- Region's thematic focus should be reflected in packages
- Tourism packages should focus on sustainability
- Packages should not stop at the border – cross-border packages as advantage in competition
- Up-to-date and harmonized information about packages should be given through all involved organisations/operators
- Cooperation with tour-operators and wholesalers in order to provide bookable packages
- Creation of a quality label for packages in soft tourism increases international visibility of the region and provides a higher rate of trust
- Acceptance of packages should be checked regularly/adaption of packages

##### Demand

- Target groups should be identified and needs and expectations analysed (demand analysis)
- Offers and services should match the identified needs of target groups (Tailor-made services and offers)
- Capacity of services should meet the demand
- Special requirements of tourists (luggage, bicycle transport,...) have to be respected
- Synergies should be used (e.g. sustainable transport offers for tourists should also be used by other groups)

- International trends should be considered (sustainability, environment protection, etc.)

## Organisation

- Awareness of public sector for the benefits of sustainable mobility has to be increased
- Close cooperation of stakeholders in tourism AND transport in development of offers and packages
- Partnership of local, regional and national authorities (depending on the responsibilities in the country/region)
- Establishment of transport associations and tourism destination management institutions to support coordination (e.g. harmonization of timetables, destination management, ...)
- Strong involvement of private sector – tourist agencies, private transport operators, etc.

## Funding

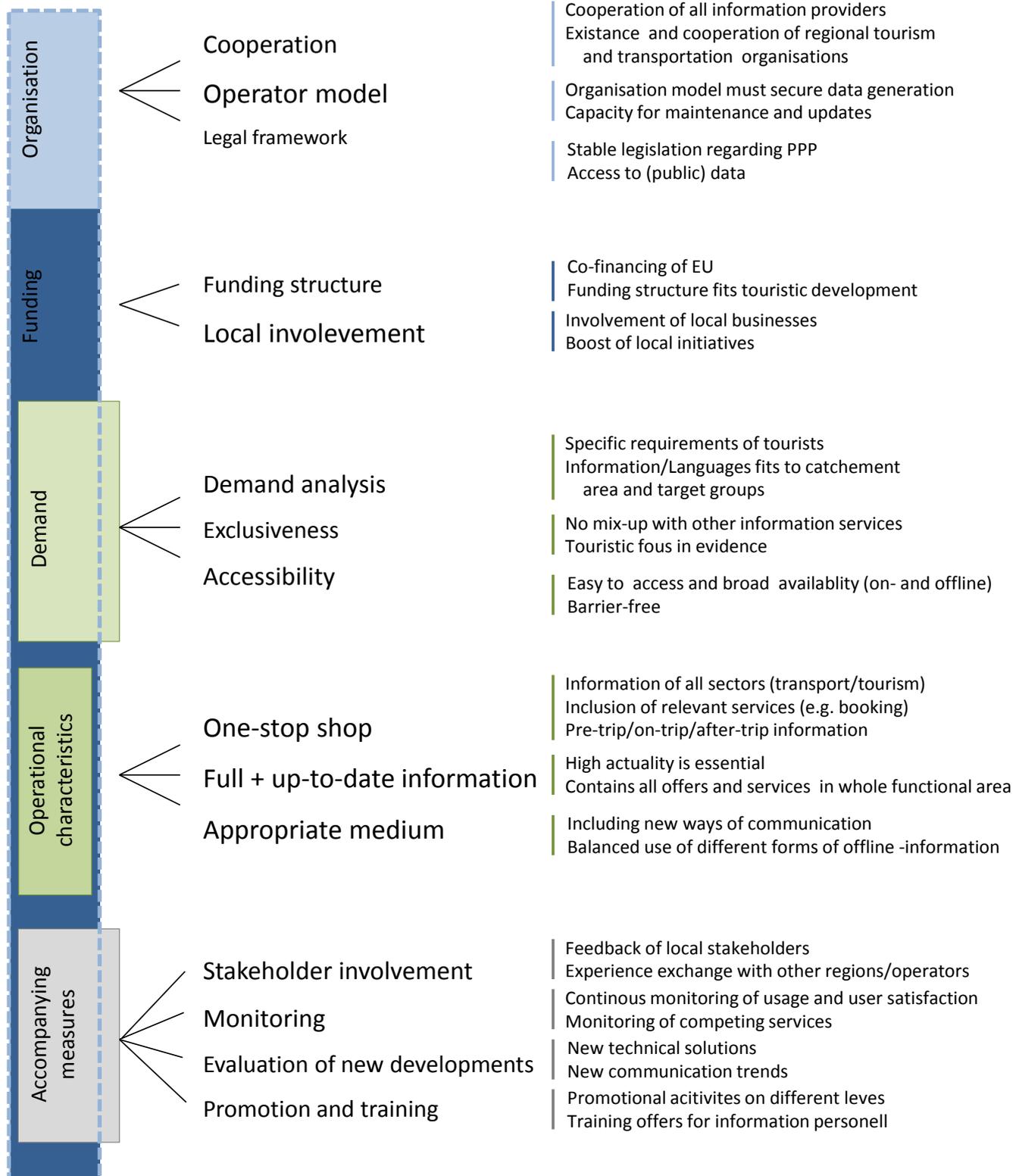
- Sound planning of necessary financial resources in the planning phase in order to have a sustainable operation after tenders
- Involvement of local businesses (in financing but also in benefits)
- Foster the development of specific funding schemes for sustainable mobility in tourism (in case of new schemes to be developed)
- Make sure that sustainable mobility/transport remains one of the prioritised fields of activity in the funding schemes of the next period
- Funding schemes should support sustainable mobility projects, in order to come over the first years of operation when demand has still to be activated.
- Coordination/cooperation in the development of funding schemes on the local, regional and national level + co-financing of EU
- Funding schemes with a clear strategic program and achievable goals
- Funding schemes should offer possibilities for private sector to apply

## Accompanying measures

- Overall marketing and promotion strategies should be implemented
- Harmonization of promotional activities – umbrella brand
- Permanent monitoring and quality tests, image research
- Improvement of expertise of staff in transport and tourism
- Awareness building measures especially in the field of sustainable tourism and sustainable mobility in tourism

## 4.2 Transportation and tourism information systems – success factors

### 4.2.1 Overview



## 4.2.2 Detailed list of success factors

### Content

- One-Stop-Shop for information about touristic attractions and sustainable mobility offers
- Information for all phases of the journey: pre-trip, during trip and after-trip
- The system should include all relevant information and services including booking possibility
- The information system has to contain information about the whole functional area (including international gateways) either directly or via links to other relevant systems
- Information must be up-to-date
- For public transport information: harmonized information about timetables and routes as well as tariffs has to be provided
- All information must be easy accessible (high usability) and barrier-free; user experiences have to be regarded

### Demand

- The information systems has to fit the specific requirement for tourists – no mix up with other target groups
- The information system should offer all languages spoken in the region's touristic catchment area
- Reliable and real-time information is demanded
- Respect demand for the usage of new ways of communications
- Barrier-free access to information

### Organisation

- New information systems should not compete against existing state of the art systems, but integrate them if useful
- Cooperation of touristic and transportation sector for implementation of information services → higher quality and acceptance of information systems run jointly by relevant stakeholders
- Efforts to run the information system have to reflect the institutional capacities (competences, resources) of the operators
- Organisation model must secure sustainable data generation, update and maintenance
- Avoid redundant data generation through clear allocation of competences/responsibilities between all partners involved
- Data, information and property rights have to be taken into consideration
- Stable legislation regarding the cooperation of public and private stakeholders in the operation of an information system
- Information should also be available for mobile devices (e.g. smartphones)

## Funding

- Sound planning of necessary financial resources (investment + operation/maintenance) in the planning phase in order to secure sustainable operation of information system
- Funding structure must fit the level of touristic development in the region
- Co-financing of European Union
- Involvement of local businesses

## Accompanying measures

Accompanying measures should for example include the permanent exchange of experiences or the involvement of local stakeholders:

- Continuous monitoring of usage and user satisfaction
- Regular involvement of clients and partners (e.g. collection of feedback of hotel owners)
- Regular exchange of experiences with other regions/operators, inclusion of further participants
- Monitoring of new communication trends and new technical solutions - continuous update of system
- Continuous training of staff
- Promotional activities on regional, national and international level

## 4.3 Concepts and Strategies

### 4.3.1 Overall strategies and plans

Overall strategies and plans are essential for a guided development. Development measures following a comprehensive and coherent development strategy instead of point-like development measures contribute directly to the defined objectives and secure the efficient use of limited resources available.

**The success factors mostly brought up by the partners are:**

- Strategies should set the frame for guided development for the next years taking into account regional capabilities
- Coherent and realistic objectives and measures commonly defined/developed by all necessary stakeholders
- Comprehensive objectives and measures for tourism and transport
- Clear implementation horizon and measurable indicators which allow the monitoring of implementation
- Coherence between national and regional plans and strategies
- Involvement of all relevant stakeholders from the beginning until the end of the strategy development process
- Clearly defined responsibilities

- Subsidiarity is important for the successful implementation

#### 4.3.2 Marketing strategies

Specific success factors for marketing strategies (besides the above mentioned which are also valid in this respect) are:

- Formulation of a touristic brand for the given area
- Definition and clear focus on several thematic areas depending on the available assets
- Identification and clear focus on target groups
- Close cooperation of all relevant stakeholder
  - Within the transport sector (transport operators, public transport associations, etc.)
  - Within the tourism sector (local, regional and national tourism institutions together with tour operators, NGOs, etc.)
  - Between the transport and the tourism sector
  - Within the region, with the neighbouring regions, on the cross-border and the transnational level (depending on the scope of the marketing strategy)
- Integrated promotion with common brand (areal and sectorial)
- Right mix of information channels

## 5 INDEX OF FIGURES

Figure 1: Action plan transnational SoA (source: Transdanube common methodology) .....	6
Figure 2: SWOT – Transportation Strengths.....	8
Figure 3: SWOT – Transport Weaknesses.....	9
Figure 4: SWOT – Transport Opportunities .....	10
Figure 5: SWOT – Transportation Threats .....	10
Figure 6: SWOT – Tourism Strengths.....	11
Figure 7: SWOT – Tourism Weaknesses .....	12
Figure 8: SWOT – Tourism Opportunities.....	12
Figure 9: SWOT – Tourism Threats .....	13
Figure 10: SWOT – Organizational/financial/administrative aspects - Strengths .....	14
Figure 11: SWOT – Organizational/financial/administrative aspects - Weaknesses.....	15
Figure 12: SWOT – Organizational/financial/administrative aspects - Opportunities .....	16
Figure 13: SWOT – Organizational/financial/administrative aspects - Threats .....	17
Figure 14: Examined fields of action in the SoA-analysis .....	18