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Abstract

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One of the tools of the transnational **Living Danube Limes** project is the elaboration of a “Strategy for a successful implementation of strong and interconnected museum clusters along the Danube” which will integrate, and link museums along the river and will enable a coordinated approach to knowledge dissemination, physical and virtual reconstruction, visibility measures, living-history events. This paper will serve to create a new model of cooperation between museums in the Danube region, with the purpose of increasing the visibility of the Roman heritage and its potential for tourism, and to facilitate the mutual exchange of knowledge and resources. The strategy highlights key elements in the creation of a museum cluster based on the Danube region’s specifics and its competitiveness. It analyses the stages of the (Living) Danube Limes Museum Cluster development, the benefits and advantages to cluster members and visitors. The document focuses on the joint museum cluster activities, such as the promotion of transnational cooperation between museums, the use of common tools to share and exchange information, the development of a joint communication strategy, the organization of events and exhibitions, and outlines the cluster map and the cluster value chain. It also evaluates the impact of such a museum cluster and the challenges that need to be addressed to ensure its successful development.



TABLE OF CONTENTS

Tables	6
Figures.....	6
Introduction.....	7
1. Analysis and Mapping of Danube Limes Museum Cluster	8
1.1. Danube Countries' Analysis	9
1.1.1 Germany	9
1.1.2 Austria	16
1.1.3 Slovakia	22
1.1.4 Hungary.....	27
1.1.5 Croatia	37
1.1.6 Serbia.....	40
1.1.7 Bulgaria	47
1.1.8 Romania	52
1.1.9 Moldova.....	60
1.2 Danube Region's Analysis	67
1.2.1 Museum Cluster Diamond	67
1.2.2 Museum Cluster Map.....	74
1.2.3 Museum Cluster Value Chain.....	75
2 Danube Limes Museum Cluster Concept.....	77
2.1 Concept and Idea	77
2.2 Museum Cluster Members	78
2.2.1 Mapping and identification.....	78
2.2.2 Strengths of the identified museums	90
2.2.3 Key Members of the Museum Cluster	92
2.2.4 Unique Selling Points	96
3. Strong and Interconnected Museum Cluster	102
3.1. Positioning of the Museum Cluster	102
3.2. Mission, vision, objectives.....	104
3.2.1. Mission and vision.....	104
3.2.2. Strategic Objectives.....	104

3.3.	Stages of development	105
3.3.1.	Stage 1: Autonomous network.....	105
3.3.2.	Stage 2: Institutionalization process	106
3.4.	Tools for connecting the Danube Region.....	107
3.4.1.	Roman lusoria “Danuvina Alacris”	107
3.4.2.	Virtual Reality Reconstructions	108
3.4.3.	Danube Limes Cultural Route.....	108
3.4.4.	(Living) Danube Limes Brand	109
3.5.	Consolidation Tools.....	109
3.5.1	Knowledge Transfer and Mobility.....	109
3.5.2	Marketing and Promotion.....	110
3.5.3	Innovation and Research	110
3.5.4	Cross-sectoral Cooperation	110
4.	Impact of the Danube Limes Museum Cluster	111
	Conclusion.....	114
	References	115

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The Strategy is developed originally in English. Any translation into other language shall be deemed as reference and English version shall prevail in any case!

Tables

Table 1: Number of museum visits 2014-2019, Bulgaria	50
Table 2: Categories of archaeology sites in Romanian Danube area counties	53
Table 3: Number of museums, museum visitors and inventory pieces 2011-2020, Moldova	64
Table 4: Unique selling points (Living Danube Limes pilot sites)	96
Table 5: SWOT Analysis of the Danube Limes Museum Cluster	103

Figures

Figure 1: Owners and Operators of the public collections in 2012 and 2013	33
Figure 2: (Living) Danube Limes Museum Cluster Diamond	68
Figure 3: Nights spent at a tourist accommodation	69
Figure 4: Number of museum visits, total/free attendance, 2015-2019	70
Figure 5: Number of private and public museums, total/free attendance, 2015-2019	71
Figure 6: Types of museums and visitor centres	72
Figure 7: Danube Limes Museum Cluster Map	74
Figure 8: Museum Cluster Value Chain	76
Figure 9: Categories of cultural heritage institutions	79
Figure 10: Geographical allocation	79
Figure 11: Locations of potential cluster members	80
Figure 12: Territorial coverage of surveyed institutions	81
Figure 13: Ownership of surveyed institutions	81
Figure 14: Thematic focus of the surveyed institutions	81
Figure 15: Level of innovation of the surveyed institutions	82
Figure 16: Participation to networks and labels of the surveyed institutions	83
Figure 17: Categories of networks and labels	84
Figure 18: Benefit expectations from participating in the museum cluster	85
Figure 19: Willingness to participate in the activities of the museum cluster by category	85
Figure 20: Visitor interaction techniques	86
Figure 21: Visitor preferences	87
Figure 22: Existing collaborations with stakeholders	87
Figure 23: Existing cooperation with other organisations	88
Figure 24: Willingness and ways to contribute to the establishing of the museum cluster	89
Figure 25: Challenges	90

Introduction

Desislava Mincheva-Yordanova and Veselin Vasilev (NTC BG Guide)

Museums play a significant role in creating a community image and in transforming its socio-economic value. It is becoming a priority to enhance their capabilities in facing the challenges and instabilities in the tourism and cultural markets through cooperation and innovation. And this could be achieved through the establishment of museum clusters. The cluster-based approach is the tool that supports museums to identify new potential market opportunities, to become aware of best practices and be more competitive, more innovative, stronger, and interconnected.

Especially along the Danube, on the territory of the Frontiers of the Roman Empire, there is a need to apply the cluster approach for the museums along the Danube Limes. In this way the common Roman heritage will be kept alive and living, and the Danube will become a competitive heritage destination.

To do this, it is important to facilitate the consolidation of the efforts of these institutions, by allowing them to network, to exchange good practices and to show their potentials in the development of the cultural and tourist life of the Danube River basin as a common destination. Therefore, the Living Danube Limes project is giving the opportunity to these museums to connect and collaborate by the establishment of a (Living) Danube Limes Museum Cluster (DLMC).

The Strategy Paper is developed based on data collected by several surveys and results from organized workshops within the Living Danube Limes project (2020-2022), as well as desk research by project partners on the local and regional frameworks and conditions. There are stronger and interconnected museums in the upper part of the Danube than in the other parts. The strategy will explain why the creation of the (Living) Danube Limes Museum Cluster will overcome these discrepancies. It will analyze the background for the creation of a museum network based on the current needs and expectations of the museums and of the cultural and tourist sectors, first at a national level then at a transnational one. Based on such an analysis, it will then identify the milestones for the creation of a strong and interconnected (Living) Danube Limes Museum Cluster. Having autonomous non-legally binding structure or being institutionalised at a later stage, the Museum Cluster will follow its vision to be among the well-recognized museum networks and representative of Limes heritage in the Danube region. It will follow common standards for communication and public relations to increase the museums' value, attractiveness and visibility in the international sustainable tourism sector. The common standards will further enhance the presentation and understanding of the Danube Limes region as one joint cultural and natural landscape in all the Danube Region countries.

1. Analysis and Mapping of Danube Limes Museum Cluster

Nouha Ben Salem and Veselin Vasilev (NTC BG Guide)

The cluster concept was first proposed by Michael Porter in 1990. Ever since, it drew much attention from the academic world and from political figures. It is a concept that it is seen as an opportunity for strategic regional economic progress. “Clusters are geographic concentrations of interconnected companies and institutions in a particular field. Clusters encompass an array of linked industries and other entities important to competition. They include, for example, suppliers of specialized inputs such as components, machinery, and services, and providers of specialized infrastructure. Clusters also often extend downstream to channels and customers and laterally to manufacturers of complementary products and to companies in industries related by skills, technologies, or common inputs. Finally, many clusters include governmental and other institutions—such as universities, standards-setting agencies, think tanks, vocational training providers, and trade associations—that provide specialized training, education, information, research, and technical support” (Porter, Clusters and the new economics of competition, 1998).

Clusters identification can be categorized based on their geographical position (local, regional, national), based on their activity sector (Agricultural, Finance, Manufacturing, Information and Technologies, Culture, Fashion, Training, etc.), or based on their economic drivers (proximity to markets, supplies of specialized labor, presence of input and equipment suppliers, availability of natural resources and infrastructure, low transaction costs) (Ionescu, 2003).

For the creation of the Living Danube Limes Museum Cluster, a country analysis of the cultural and tourism sectors with a focus on the role of museums is required. The following analysis presents an application of Michael Porters’ Diamond Model. The use of this method will help to understand why certain countries demonstrate competitive cultural and tourism markets while other do not, what advantages do museums rely on in the competitive countries, and how clustering as a consolidation tool can help museums to reach international competitiveness by developing and brazing unique and sustainable strengths and capabilities.

1.1. Danube Countries' Analysis

1.1.1 Germany

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Brief country overview (focus on the Danube)

Germany has around 83 million inhabitants¹ and, with an area of 357,588 km² and an average of 232 inhabitants per square kilometers, is one of the most densely populated territorial states. Measured by gross domestic product, Germany is the largest economy in Europe and the fourth largest in the world.²

Due to the scarcity of raw materials and the automation and digitalisation of industry, the country, which depends on the quality of its education system, is increasingly developing into an information and knowledge society. In the list of nation states based on the Human Development Index, Germany took sixth place for the year 2019³.

The catchment area of the Danube is limited to the two southern federal states of Baden-Württemberg (approx. 8,050 km²) and Bavaria (approx. 48,200 km²)⁴.

Bavaria is the largest federal state in Germany in terms of area (70,542 km²) and the second most populous (13,076,721 inhabitants), while Baden-Württemberg ranks third in both categories (35,748 km² resp. 11,069,533 inhabitants)⁵. Similar to other industrialised nations, Germany - Bavaria and Baden-Württemberg are no exceptions - is affected by demographic change. The most populous cohorts are found at an increasingly older age. In the 2011 census, the 40 to 49-year-olds and the 50 to 59-year-olds had the highest proportion.⁶ The influence of immigration and, currently, the Covid-19 pandemic on this development is rather small.

In comparisons between the federal states, Bavaria and Baden-Württemberg generally score well above average in terms of performance in the field of education. For example, in the INSM Education Monitor in 2021, Bavaria took second place behind Saxony, as in previous years, while Baden-Württemberg took sixth place.⁷ In the winter semester 2021/2022, 2,947,495 people were enrolled

¹ Federal Statistical Office of Germany, September 2021, retrieved 21 January 2022, <https://www.destatis.de/DE/Home/inhalt.html>.

² World Economic Outlook Database, October 2020, International Monetary Fund, retrieved 21 January 2022, <https://www.imf.org/en/Publications/WEO/weo-database/2020/October>.

³ Human Development Report 2020 The Next Frontier: Human Development and the Anthropocene (PDF), United Nations Development Programme, p. 343, retrieved 21 January 2022, <http://hdr.undp.org/sites/default/files/hdr2020.pdf>.

⁴ Flussgebietsgemeinschaft Donau, 2022, Bavarian State Ministry of the Environment and Consumer Protection, retrieved 21 January 2022, https://www.fgg-donau.bayern.de/die_donau/das_dt_einzugsgebiet/index.htm#:~:text=Das%20deutsche%20Donaeinzugsgebiet%20umfasst%20eine.km%C2%B2%2C%20der%20bayerische%20von%20ca.

⁵ Gemeinsames Statistikportal, 2018, Statistical Offices of the Federation and the federal states, retrieved 21 January 2022, <https://www.statistikportal.de/de/bevoelkerung/flaeche-und-bevoelkerung>.

⁶ Database Census 2011, persons + age (Code 1000A-0001), retrieved 24 January 2022, <https://ergebnisse2011.zensus2022.de/datenbank/online?operation=statistic&code=1000A#abreadcrumb>.

⁷ INSM-Bildungsmonitor, 2021, p. 141, German Economic Institute, retrieved 24 January 2022, https://www.insm-bildungsmonitor.de/pdf/Forschungsbericht_BM_Langfassung.pdf. The 93 indicators of the annual comparative study aim to evaluate the economic value of educational potentials within the federal states. The

at German universities, of which 407,043 belonged to Bavaria and 358,587 to Baden-Württemberg.⁸ Of the 110 universities in Germany, 18 are in Baden-Württemberg and 13 in Bavaria. The Shanghai Ranking 2021⁹ lists 10 German universities in the top 200, two from Bavaria (University of Munich, Technical University of Munich) and three from Baden-Württemberg (Heidelberg University, University of Freiburg, University of Tuebingen).

Tourism and culture-related degree programmes enjoy some popularity in Germany. Out of more than 20,000 possible degree programmes¹⁰, 58 Bachelor's¹¹ and 59 Master's¹² programmes in archaeology are available in 2022 and 3 Bachelor's and 7 Master's programmes in museum studies (excl. non-consecutive Master's programmes)¹³. In the field of ethnology and cultural and social anthropology, 31 Bachelor's¹⁴ and 38 Master's¹⁵ degree programmes are currently available. Furthermore, 61 Bachelor's¹⁶ and 24 Master's¹⁷ degree programmes with a tourism focus are offered.

Both Bavaria and Baden-Württemberg are considered to be particularly economically strong federal states in Germany. Germany's gross domestic product for 2020 was €3.332 trillion (2019: €3.449 trillion), of which Bavaria accounted for €610 billion (2019: €636 billion) and Baden-Württemberg for €501 billion (2019: €523 billion).¹⁸ The economically strongest region in Bavaria is the greater area of Munich with, among others, the automotive industry (BMW, Audi etc.), the IT sector (Siemens, Infineon etc.) and tourism (museums, Oktoberfest etc.).

The second strongest region economically is the greater area of Nuremberg with, among others, industrial companies (Siemens, etc.), sporting goods manufacturers (Adidas, Puma) and tourism

Bavaria's outstanding strengths lie in the promotion of vocational education and training, the successful prevention of educational poverty, integration, school quality, expenditure prioritisation, input efficiency and research orientation, (ibid. p. 148). Baden-Württemberg's particular strengths lie in vocational education and training, time efficiency and in the area of higher education/MINT (ibid. p. 146).

⁸ Federal Statistical Office of Germany, November 2021, retrieved 24 January 2022, https://www.destatis.de/DE/Presse/Pressemitteilungen/2021/11/PD21_538_21.html#:~:text=Nach%20ersten%20vorl%C3%A4ufigen%20Ergebnissen%20des,einer%20Hochschule%20in%20Deutschland%20eingeschrieben..

⁹ ShanghaiRanking Consultancy, 2021, 2021 Academic Ranking of World Universities, retrieved 24 January 2022, <https://www.shanghairanking.com/rankings/arwu/2021>.

¹⁰ Centre for Higher Education Development, 2019, retrieved 21 March 2022, <https://www.che.de/2019/zunehmende-vielfalt-mehr-als-20-000-studiengaenge-in-deutschland/>.

¹¹ Studiscan, 2022, retrieved 21 March 2022, <https://www.studieren-studium.com/studium/studieren/Archaeologie-Deutschland>.

¹² Studiscan, 2022, retrieved 21 March 2022, <https://www.studieren-studium.com/master/studieren/Archaeologie-Deutschland>.

¹³ Museumswissenschaft.de, (Editor-in-Chief: Schiele, Marisa), 2022, retrieved 21 March 2022, <https://museumswissenschaft.de/studium/>.

¹⁴ Studiscan, 2022, retrieved 21 March 2022, https://www.studieren-studium.com/studium/studieren/Ethnologie_Kultur_und_Sozialanthropologie-Deutschland#result.

¹⁵ Studiscan, 2022, retrieved 21 March 2022, https://www.studieren-studium.com/master/Ethnologie_Kultur_und_Sozialanthropologie.

¹⁶ Studiscan, 2022, retrieved 21 March 2022, <https://www.studieren-studium.com/studium/studieren/Tourismus-Deutschland>.

¹⁷ Studiscan, 2022, retrieved 21 March 2022, <https://www.studieren-studium.com/master/Tourismus>.

¹⁸ Gemeinsames Statistikportal, September 2021, Statistical Offices of the Federation and the federal states, retrieved 25 January 2022, <https://www.statistikportal.de/de/vgrdl/ergebnisse-laenderebene/bruttoinlandsprodukt-bruttowertschoepfung/bip#9517>.

(museums, Christkindlesmarkt, etc.). Baden-Württemberg stands out particularly in the field of industrial high technology and research and development and, as in previous years, took the top spot in the European innovation scoreboard 2020.¹⁹ The proportion of family businesses is characteristic of both Bavaria and Baden-Württemberg. Of the 1,000 most important family businesses in Germany, 204 are based in Bavaria and 203 in Baden-Württemberg, which corresponds in a comparison of the federal states to second and third place after North Rhine-Westphalia (258 businesses).²⁰ Tourism plays a major role for both federal states. Bavaria counted a good 100 million overnight stays in 2019²¹ and Baden-Württemberg had over 57 million overnight stays²², while Germany had around 496 million overnight stays in 2019²³. The Danube plays a minor role for tourism in Baden-Württemberg. The most important regions are the Black Forest (market share 40%), northern Baden-Württemberg (18%), Stuttgart (16%) and Lake Constance (9%). Of the urban and rural districts crossed by the Danube, the urban district of Ulm was the most important in terms of tourism with 74,000 overnight stays in 2019.²⁴ In Bavaria, the tourism region of Munich-Upper Bavaria is the most important with 44 million overnight stays in 2019. Franconia (23 million), Eastern Bavaria (18 million) and Allgäu/Bavarian Swabia (17 million) follow at a considerable distance. The Danube, which crosses four of seven administrative districts in Bavaria (Swabia, Upper Bavaria, Lower Bavaria, Upper Palatinate) and contributes to the usability for international freight shipping between the North Sea and the Black Sea from Kelheim onwards, has some relevance for tourism. In terms of overnight stays, the tourism regions of the Bavarian Forest and the Bavarian Golf and Spa Region clearly take the lead here with 7 million overnight stays each in 2019.²⁵

Museum Clusters

For the year 2019, 6834 museums (3483 private and 3094 public) could be counted in Germany, with Baden-Württemberg (1237) and Bavaria (1196) showing the largest share per federal state.²⁶ There are 31 museums in Baden-Württemberg and 43 in Bavaria that are related to Roman heritage, while 4 of these museums in Baden-Württemberg and 15 in Bavaria are located in a district or city through which the Danube flows.²⁷ A total of 111,633,603 museum visits were recorded in Germany for 2019.

¹⁹ State Statistical Office of Baden-Württemberg, April 2021, retrieved 3 February 2022, <https://www.statistik-bw.de/Presse/Pressemitteilungen/2021093>.

²⁰ Die Deutsche Wirtschaft, Juli 2020, retrieved 3 February 2022, <https://die-deutsche-wirtschaft.de/bundeslaender-nach-top-familienunternehmen/>.

²¹ State Statistical Office of Bavaria, February 2020, retrieved 3 February 2022, <https://www.statistik.bayern.de/presse/mitteilungen/2020/pm030/>.

²² State Statistical Office of Baden-Württemberg, February 2020, retrieved 3 February 2022 <https://www.statistik-bw.de/Presse/Pressemitteilungen/2020037>.

²³ Federal Statistical Office of Germany, February 2020, retrieved 5 February 2022, https://www.destatis.de/DE/Presse/Pressemitteilungen/2020/02/PD20_041_45412.html.

²⁴ State Statistical Office of Baden-Württemberg, February 2020, retrieved 5 February 2022 <https://www.statistik-bw.de/Presse/Pressemitteilungen/2020037>.

²⁵ State Statistical Office of Bavaria, February 2020, XLS-file „Tourismusregionen: Dezember 2019 und Januar bis Dezember“, retrieved 5 February 2022, <https://www.statistik.bayern.de/presse/mitteilungen/2020/pm030/>.

²⁶ Institute for Museum Research, Zahlen & Materialien aus dem Institut für Museumsforschung, Vol. 75 (2021), Pdf, retrieved 18 February 2022, <https://journals.ub.uni-heidelberg.de/index.php/ifmzm/issue/view/5496/1014>, pp. 52 and 70.

²⁷ The figures were determined by our own research.

The number has risen constantly since 1990 (approx. 97 million).²⁸ Thematically, most visits are to the complex of historical and archaeological museums (19.5%), followed by visits to art museums (17.9%) and those to natural science and technical museums (14.5%).²⁹ For 2019, 8255 (in 2018: 8750) special exhibitions were counted in Germany (Baden-Württemberg: 1218 (2018:1234), Bavaria: 1203 (2018: 1244)). Most of these were in the field of local/regional history and European ethnology (3564 (2018: 3847)), involving 1232 (2018: 1334) museums. These museums recorded 12,082,781 visitors in 2019 (2018: 11,000,481). The relation between the number of museums and the number of special exhibitions to the reported number of visitors stands out negatively. Thus, on average, only 9807 visitors accounted for one museum in 2019 (2018: 8246) resp. 3390 visitors accounted for one special exhibition (2018: 2859). While this ratio is significantly more favourable for the museums with the most popular subject matter (art museums and historical/archaeological museums). In 2019, 406 art museums held 1869 special exhibitions (2018: 436 museums and 1911 special exhibitions) and reported a total of 16,881,585 visitors (2018: 17,060,650). 204 history and archaeology museums (2018: 216) held 508 special exhibitions (2018: 541) and reached a total of 14,369,091 visitors (2018: 16,287,999). Thus, in 2019, an art museum received an average of 41,580 visitors (2018: 39,130) and a special exhibition at an art museum received 9032 visitors (2018: 8928). While an average of 70,437 visitors (2018: 75,407) came to a history/archaeology museum and 28,286 visitors (2018: 30,107) to a special exhibition of a history/archaeology museum. A total of 79,069,776 visitors (2018: 77,607,205) were reported by museums holding a special exhibition in 2019. On average, a museum had 29,559 visitors (2018: 27,126) and a special exhibition had 9,578 visitors (2018: 8869).³⁰

Cooperation between German museums in terms of exhibitions and staff are a matter for the museums themselves, i.e. they are possible in principle and can be intensified through corresponding alliances or networks. For a cooperation with the EU Interreg DTP project "Living Danube Limes", the following associations seem to be particularly attractive, as they fit the profile regionally as well as thematically:

- Roman museums along the Bavarian Danube Limes (Römermuseen am bayerischen Donaulimes)
- Archaeology in Eastern Bavaria - Museums in a network (Archäologie in Ostbayern – Museen im Verbund)
- Working Group Museums at the Limes (AG Museen am Limes)
- Museum Network Antiquity in Bavaria (Museumsnetzwerk Antike in Bayern).

National Diamond

Factor conditions

In 2019, foreign tourists spent around €46.9 billion in Germany and domestic tourists around €247 billion. In both cases, the volume has risen steadily since 2015, from €39.8 billion and €231 billion

²⁸ Institute for Museum Research, Zahlen & Materialien aus dem Institut für Museumsforschung, Vol. 75 (2021), Pdf, retrieved 18 February 2022, <https://journals.ub.uni-heidelberg.de/index.php/ifmzm/issue/view/5496/1014>, p. 12.

²⁹ Ibid, p. 41.

³⁰ Data from: Institute for Museum Research, Zahlen & Materialien aus dem Institut für Museumsforschung, Vol. 75 (2021), Pdf, retrieved 18 February 2022, <https://journals.ub.uni-heidelberg.de/index.php/ifmzm/issue/view/5496/1014>, pp.92f.

respectively.³¹ The total of €294 billion for 2019 has a share of 11.8% of the gross domestic product, which amounted to €3.473 trillion.³² In 2019, 2.779 million people were employed in the tourism sector in Germany, the ratio of indirect to direct employment was approximately 1:2. This number has increased permanently since 2015 (2.748 million), but the share in nationwide employment has declined, from 9.3% in 2015 to 9% in 2019.³³

Germany is home to three World Heritage Sites related to Roman antiquity: the Lower German Limes (together with the Netherlands), the western part of the Roman Limes (together with Austria and Slovakia) and the Roman monuments in the city of Trier. Both limes areas are part of the comprehensive Roman border fortification system, which had different designs depending on the region. Both sites thus represent a complex and unique heritage of Roman culture. Trier, the Rome of the North, not only offers well-preserved Roman architecture, but also does so in a density that is nowhere else north of the Alps.³⁴

Demand conditions

In 2019, a total of 111,633,603 museum visits were recorded in Germany. The number has risen steadily since 1990 (approx. 97 million).³⁵ The highest shares were in the states of Bavaria with 18.5 million and Baden-Württemberg with 17.3 million visits.³⁶ In terms of subject matter, most visits belong to the complex of historical and archaeological museums (19.5 %), followed by visits to art museums (17.9 %) and those to natural science and technical museums (14.5 %).³⁷

4414 (2018: 4730) museums participated in a survey on admission fees in 2019 and 2018. According to this survey, 35% (2018: 35.8%) do not charge an entrance fee. The proportion of museums charging less than €1.50 is relatively low: 4.1% (2018: 4.6%). 10.6% of museums charged an

³¹ Federal Statistical Office of Germany, December 2021, Aktuelle Daten zur Tourismuswirtschaft – Kurzfassung. Wirtschaftliche Bedeutung und Nachhaltigkeit, Pdf, retrieved 4 March 2022, <https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen-Inlandsprodukt/Publikationen/Downloads-Input-Output-Rechnung/aktuelle-daten-tourismuswirtschaft.html;jsessionid=4C97839010760EC55F420EFA59DF0498.live721>, pp. 6, 10, 12, 14, 16.

³² Federal Statistical Office of Germany, February 2022, Volkswirtschaftliche Gesamtrechnungen. Bruttoinlandsprodukt, Bruttonationaleinkommen, Volkseinkommen, Lange Reihen ab 1925, Pdf, retrieved 4 March 2022, https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen-Inlandsprodukt/Tabellen/inlandsprodukt-volkseinkommen1925-pdf.pdf?_blob=publicationFile, p. 3.

³³ Federal Statistical Office of Germany, December 2021, Aktuelle Daten zur Tourismuswirtschaft – Kurzfassung. Wirtschaftliche Bedeutung und Nachhaltigkeit, Pdf, retrieved 4 March 2022, <https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen-Inlandsprodukt/Publikationen/Downloads-Input-Output-Rechnung/aktuelle-daten-tourismuswirtschaft.html;jsessionid=4C97839010760EC55F420EFA59DF0498.live721>, p. 31.

³⁴ UNESCO World Heritage Convention, March 2022, retrieved 4 March 2022, <https://whc.unesco.org/en/>, references 367, 1608, 1631.

³⁵ Institute for Museum Research, Zahlen & Materialien aus dem Institut für Museumsforschung, Vol. 75 (2021), Pdf, retrieved 4 March 2022, <https://journals.ub.uni-heidelberg.de/index.php/ifmzm/issue/view/5496/1014>, p. 12.

³⁶ Statista, Source: Institute for Museum Research, 2021, retrieved 21 March 2022, <https://de.statista.com/statistik/daten/studie/28278/umfrage/anzahl-der-museumsbesuche-nach-bundeslaendern/#:~:text=Im%20Jahr%202019%20betrug%20die,Bayern%20rund%2018%2C5%20Million en.>

³⁷ Ibid, p. 41.

admission fee of at least €6 (2018: 10.1%), while in both years around half of all museums charged between €1.50 and €6 as admission. The internal distribution is relatively even here.³⁸

In 2019, 239 (2018: 225) institutions that can be classified as historical and archaeological museums participated in a survey on the ratio of local/regional visitors to supraregional tourist ones. Here it can be seen that the proportion of local/regional visitors is lower, on the one hand in comparison to tourists and on the other hand in view of the figures for other museum types. In 2019, 22.6% (2018: 23.1%) of museums reported that less than 20% of visitors were resident in the region, 20.5% (2018: 20.9%) of museums put the figure at 21-40%, 19.7% (2018: 17.8%) at 41-60%, 18.8% (2018: 20.9%) at 61-80% and 18.4% (2018: 17.3%) at 81-100%.³⁹

Context for Firm Strategy and Rivalry

The proportion of private museums in Germany is relatively high in international comparison. Of the 6834 museums counted in 2019, associations were identified as the sponsors in 2043 cases, private individuals in 473 cases, companies and cooperatives in 327 cases, foundations under private law in 251 cases, and mixed public-private forms in 257 cases.⁴⁰ Their share thus amounted to 47%. There are several reasons for the relatively high proportion. On the one hand, tax law in Germany is favourable for private donors in terms of asset preservation, and on the other hand, the museums themselves also have advantages, especially since public funding is also possible for private museums. For example, private museums have more planning and financial freedom, and are not as susceptible to lengthy bureaucratic processes. Furthermore, they are not bound by public tenders, which require at least three applications and compulsory acceptance for the cheapest offer.⁴¹

Related and Supported Industries

As tourism is a cross-sectoral industry, the industries associated with it are best captured through the products that are relevant to tourism. According to expenditure on these services by residents, the most significant are: restaurant services (€46.5 billion in 2019 / by non-residents: €10.8 billion)⁴², accommodation services (€36.8 billion / €13.6 billion), sport, recreation, leisure & culture (€18.5 billion / €0.2 billion), fuel (€16.0 billion / €0.4 billion), air transport services (€14.6 billion / €7.9 billion), road and urban transport services (€14.3 billion / €0.8 billion), food (€12 bn / €1.6 bn), travel agencies & tour operators (€9.8 bn / €0.8 bn), health services (€7.9 bn / €0.3 bn), railway services (€3.8 billion / €0.4 billion), shipping services (€3.8 billion / €1.2 billion) and services for rental vehicles (€2.6 billion / €0.2 billion).⁴³ Expenditure on all products has been increasing since 2015, with the exception of those on road and local transport services, air transport services and fuel (in the case of expenditure by residents) and those on health services and fuel (in the case of

³⁸ Ibid, p. 76f.

³⁹ Ibid, p. 103.

⁴⁰ Ibid, p. 64.

⁴¹ Julia Voss, Die Vorzüge des Privatmuseums. Wer jetzt keins hat, baut sich eins, Frankfurter Allgemeine Zeitung, June 2016, retrieved 8 March 2022, https://www.faz.net/aktuell/feuilleton/kunst-und-architektur/die-vorzuege-des-privatmuseums-in-deutschland-14300486.html?printPagedArticle=true#pageIndex_3.

⁴² All data refer to the year 2019, expenditure by residents is compared with that by non-residents.

⁴³ Federal Statistical Office of Germany, December 2021, Aktuelle Daten zur Tourismuswirtschaft. Wirtschaftliche Bedeutung und Nachhaltigkeit, Pdf, retrieved 21 March 2022, https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen-Inlandsprodukt/Publikationen/Downloads-Input-Output-Rechnung/aktuelle-daten-tourismuswirtschaft.pdf;jsessionid=7D79D2FDD23B96CB05702188C818FE76.live721?_blob=publicationFile, pp. 16, 19.

expenditure by non-residents).⁴⁴ In 2019, expenditure in the tourism sector had a share of 11.8% of the gross domestic product, while in the same year 2.779 million people were employed in this economic sector out of a total population of around 83 million.⁴⁵

As in other countries, the Covid-19 pandemic has hit the tourism sector in Germany hard. In the period from March 2020 to December 2020, turnover from overnight stays and day tourism fell by €68.7 billion compared to the same period in the previous year.⁴⁶ However, due to the relatively robust German economy in international comparison and due to the strong governmental will to support the economy, it can be assumed that the German tourism industry will recover relatively well from the effects of the Corona pandemic.

Government

German government spending on tourism has remained constant at around 1% of total spending since 2015, an absolute increase from €14.2 billion in 2015 to €15.9 billion in 2019. The largest share of this is accounted for by the costs of intermediate inputs and employee compensation. Subsidies amounted to €1.3 billion in 2015 and €1.5 billion in 2019.⁴⁷ In the same period, state subsidies for museums increased from €113 million to €139 million⁴⁸, while the total amount of state subsidies increased from €27.6 billion to €31 billion.⁴⁹

In the course of cushioning the effects in the context of the pandemic crisis, there have been additional support funds on a large scale since 2020. For example, government subsidies more than doubled from 2019 to 2020, amounting to €71 billion in 2020.⁵⁰ The cultural sector received special support, reaching a record budget of more than €2 billion in 2021. In addition, the federal

⁴⁴ Ibid.

⁴⁵ Federal Statistical Office of Germany, December 2021, Aktuelle Daten zur Tourismuswirtschaft – Kurzfassung. Wirtschaftliche Bedeutung und Nachhaltigkeit, Pdf, retrieved 8 March 2022, <https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen-Inlandsprodukt/Publikationen/Downloads-Input-Output-Rechnung/aktuelle-daten-tourismuswirtschaft.html;jsessionid=4C97839010760EC55F420EFA59DF0498.live721>, pp. 6, 10, 12, 14, 16, 31.

⁴⁶ Dwif-Corona-Kompass, November 2021, retrieved 8 March 2022, <https://www.dwif.de/corona-kompass.html>.

⁴⁷ Federal Statistical Office of Germany, December 2021, Aktuelle Daten zur Tourismuswirtschaft – Kurzfassung. Wirtschaftliche Bedeutung und Nachhaltigkeit, Pdf, retrieved 4 March 2022, <https://www.destatis.de/DE/Themen/Wirtschaft/Volkswirtschaftliche-Gesamtrechnungen-Inlandsprodukt/Publikationen/Downloads-Input-Output-Rechnung/aktuelle-daten-tourismuswirtschaft.html;jsessionid=4C97839010760EC55F420EFA59DF0498.live721>, p. 28.

⁴⁸ Statista, Source: Federal Government (BKM), 2021, retrieved 10 March 2022, <https://de.statista.com/statistik/daten/studie/36755/umfrage/ausgaben-der-bundesregierung-zur-subvention-von-museen-seit-2005/#:~:text=Ausgaben%20der%20Bundesregierung%20zur%20Subvention%20von%20Museen%20bis%202019,-Ver%20C3%B6ffentlich%20von&text=Die%20Statistik%20bildet%20die%20Ausgaben.rund%20139%2C5%20Millionen%20Euro.>

⁴⁹ Statista, Source: Federal Statistical Office, 2021, retrieved 10 March 2022, <https://de.statista.com/statistik/daten/studie/161486/umfrage/subventionen-an-die-deutsche-wirtschaft/#:~:text=Im%20Jahr%202020%20lagen%20die,Corona%20DPandemie%20auf%20die%20Wirtschaft.>

⁵⁰ Ibid.

government provided further funding totaling €4.5 billion for the NEUSTART KULTUR economic stimulus and rescue programme and the special federal fund for cultural events.⁵¹

In Germany, state funding for the Danube Limes is primarily provided by the German Limes Commission and the Bavarian State Office for the Preservation of Monuments respectively the State Office for the Preservation of Monuments in Baden-Württemberg.

1.1.2 Austria

Maria Erker and Anna Windischbauer (PLUS)

Brief country overview (focus on the Danube)

General information/demographic: Austria is a neutral republic in Central Europe, located between Germany, Italy, Hungary and the Czech Republic. The head of state is the president. Austria has 9 states, the capital is Vienna, which is also a federal state. The current population of the state is 8.9 million, the largest cities are Vienna and Graz.

The territory of what is now Austria lay in the provinces of Noricum, Pannonia and Raetia during the Roman Empire. Noricum was originally an area settled by Celts, which was incorporated into the Roman Empire under the name Provincia Noricum in the first century AD. Pannonia also entered the Roman Empire as a province in the 1st century AD and, in addition to present-day areas in Hungary, Serbia, Slovenia and Croatia on Austrian territory, included what is now Burgenland and parts of the Vienna Basin and eastern Styria. Raetia was also established as a province in the first century, named after the tribe of the Raetians, and on Austrian territory included the northern foothills of the Alps between the Danube and the Inn, parts of northern Tyrol and present-day Vorarlberg as far as Lake Constance. The limes in this area ran along the Danube, which was a natural geographical border and at the same time one of the most important trade zones and transport routes.

Landscape description: More than 70% of the national territory is mountainous, the largest river is the Danube. With 3798 meters the Großglockner is the highest mountain in the mountain range "Hohe Tauern". The lake areas are also striking, famous is the Salzkammergut, a cultural area on the northern edge of the Tauern. The largest lake is found in the province of Burgenland in the east, it is Lake Neusiedl, an inland lake.

Education: Austria is a home to State Universities in Vienna, Linz, Innsbruck, Graz, Klagenfurt, Salzburg, Leoben and Krems. The University of Mining in Styria stands out thematically. There are also several Private Universities. In addition to general secondary schools, the school system offers many vocational schools in the fields of technology and tourism, which also lead to the Matura. You can study archeology in Vienna, Innsbruck, Graz and Salzburg and heritage protection in Krems only. The study of culture management is available in Vienna and Krems.

The historical Danube region: The Austrian part of the Danube Limes covers the approximately 350 km long stretch between Passau and Bratislava. Along the Austrian Danube Limes there were four large legionary camps, sixteen forts known so far and an unknown number of watchtowers, which controlled the traffic connections, the border fortifications and roads. In addition, there are six harbors that have been documented archaeologically and/or in writing so far, which were existential

⁵¹ Federal Government, December 2021, retrieved 10 March 2022, <https://www.bundesregierung.de/breg-de/bundesregierung/bundskanzleramt/staatsministerin-fuer-kultur-und-medien/staatsministerin-und-ihr-amt/kulturhaushalt>.

Living Danube Limes

for troop transport on the water and trade traffic. Austria is represented with 22 components, which in turn are divided into 47 sub-components (monuments and archaeological sites), at this transnational, serial World Heritage Site. The sites are located in Upper Austria, Lower Austria and Vienna along the Danube. They include the remains of entire Roman forts and military camps, civilian settlements and economic facilities, roads, and individual watchtowers along the river.

In Austria, the most popular and most visited roman heritage places are:

- Linz (settlement Martinsfeld, fortification Schlossberg),
- Enns (grave road, canabae)
- Traismauer (fort, small fort, fan tower, Roman gate),
- Tulln (fort, horseshoe tower),
- Zeiselmauer (small fort, fort, horseshoe tower, chest gate, fan tower, eastern wall),
- Carnuntum (legionary camp, fort, fortifications, civilian city, vici, burial grounds).
- Vienna: legion camps, canabae, tribune houses.

Economy: The largest economic sector for Austria is the service sector (68%) and the strongest sector is tourism, namely summer, winter and cultural tourism. A third of the working inhabitants work at the tourism. The most important tourism cities are Vienna and Salzburg. According to data from the World Economic Forum's Global Competitiveness Index, Austria ranks 21st (out of 141 countries) among the most competitive countries in the world in 2019. Due to its extreme geographic location, Austria has a very small-scale agriculture, and wine is an important agricultural export product. Due to the large forest stock, forestry and wood processing industry (paper and cardboard mills, sawmills, ...) is also a significant factor in agriculture. Austria is the fifth largest exporter of wood in the world after Canada, Russia, Sweden and Finland and ahead of sixth-ranked Germany. In the production of particleboard, Austrian companies have a market share of about one-third in Europe. Austria has a large number of different raw materials, but they are not very productive due to the rock formations. The country's mining sector is dominated by sand and gravel extraction. One of the largest deposits in the world exists for tungsten, which is why Austria ranks fourth in world production of this metal after the PRC, Russia and Canada. The largest Austrian industrial company is the Austrian branch of the German Siemens Group.

Museum Clusters

General: In Austria, museums can be supported by four different sponsors: the state, a foundation, private individuals and an association. There are pure art museums, historical museums, a large number of castles and palaces that house local museums or art galleries, some archaeological museums, natural history museums, many city museums with mixed collections, archaeological sites open to the public with and without shelters, some special museums and in the cities of Vienna, Graz and Salzburg museum associations that serve as a common umbrella organization for different museums. The big museums in the capitals also regularly show exhibitions with cross-border exchange of exhibits. In Austria, the term "museum" is not legally protected and is not bound by any requirements. It is a self-obligation of every institution and every employee to bind themselves to the "Ethical Guidelines of ICOM and to apply them consciously and with care in their daily museum work. The Museumsbund Österreich, together with all regional institutions concerned with museum affairs in the federal provinces, has developed the Museum Registration in order to distinguish museums that comply with and are bound by the ICOM definition from other cultural, museum-like institutions and facilities. The museum registration is thus a sign of quality for sustainable and thoughtful museum work and should be an orientation aid for authorities and decision-makers as well as visitors

to recognize quality museum work. 878 Museums are listed as Museums (2022) at the moment, 20 of them special about Roman or archaeology. 35 are in connection with the roman limes. For no duty of listing an actual number of museums, exhibitions, and networks does not exist. Due to security reasons the museums do not give any information about the number of staff. An exchange between different museums is not usual.

Altogether, the Austrian museums receive an estimated 19.1 million visitors per year. Visitors annually, of whom less than half come from the region (live less than 30 kilometres from the museum). Around 4,000 female and 2,500 male employees look after the well-being of visitors. On an exhibition area of nearly 2.68 million m². 1,139 special exhibitions are shown. 2.42 million visitors take part in about 189,000 educational programs; one third of the visitors are children and young people in classes. 2,156 events take place on the museum premises. The Austrian Museum has more than 7,500 cooperation partners each year. The majority of these are schools and museums, as well as cultural institutions. Two-thirds of museums (66.5%) had a museum shop in 2017. 29.3% had a museum café. More than two-thirds (69.6%) were at least partially accessible without mobility barriers. However, museums with low annual visitation (under 2,500 visits) were significantly less likely (55.7%) to be accessible than larger museums (5,000 visits or more: on average 86.6 %).

Museums in Austria are often organized in small local networks related to specific regions. Concerning Limes Archaeology there is only one network. **The Network “Museen am Limes”** provides information about individual museums and sites on the Danube. In addition to historical information and tourist-relevant information such as opening hours and arrival details, there is special information such as bike paths and offers suitable for children. There is a general homepage about the Danube, which also provides information about tourist offers, museums and the Limes in general⁵². In addition, there are individual museums and some apps that provide museums on the Danube River Basin, which also serve more than one museum.

National Diamond

Factor conditions

What do museums, TIC, VC offer: Information, digital platforms, apps, organisation of guided tours.

What do museums offer: Around 4,000 female and 2,500 male employees work at museums - so museums are a booster for jobs. 2.42 million visitors take part in about 189,000 educational programs; one third of the visitors are children and young people in classes, but they pay less or nothing for the entrance.

Cultural heritage: 12 sites in Austria belong to the world cultural heritage. Additionally, since July 2021 the Austrian Danube Limes has been listed with a total of 22 components, which in turn are divided into 47 sub-components (monuments and archaeological sites), at the transnational, serial World Heritage Site. The sites are located in Upper Austria, Lower Austria and Vienna along the Danube. They include the remains of entire Roman forts and military camps, civilian settlements and economic facilities, roads, and individual watchtowers along the river.

Reasons for the nomination:

- closed cultural area with a high cultural historical importance
- unique and special cultural traditions
- outstanding types of historical roman buildings

⁵² <https://www.donau-oesterreich.at/donaulimes>

In addition, there is the so-called intangible cultural heritage, such as the Silent Night Song. Customs and craft techniques, as well as endangered knowledge are recorded. These include oral traditions, social practices, traditional crafts, special handling of art and nature, and from the field of nutrition.

Tourism sector:

- **number & type of businesses/existing types of tourism:**

In Austria there are about seven tourism sectors, which roughly distinguish between summer (incl. mountain sports and bathing tourism) and winter tourism (ski tourism, etc.). In addition, there are other sectors such as cultural, city, congress & business, spa and wellness and agricultural tourism.

- **Technological development:**

Tourism is a growing industry. The starting position in Austria is excellent: idyllic nature, clean water, a high level of safety, diverse cultural attractions - this is a combination that makes Austria attractive. Every year, more than 40 million guests come from Austria and abroad (as of before the COVID-19 pandemic).

The Austrian Federal Economic Chamber (WKO), Austria Promotion (Österreich Werbung) and the Federal Ministry of Science, Research and Economy (BMFWF) launched a Digitalisation Strategy for the Austrian Tourism, which was published in 2017. Here are three main pillars addressed, such as:

- **“Data as a resource”:**

- 1) More value creation in Austria - reduce dependence on international online travel agencies (OTA)
- 2) Smart data in tourism - discussion on the introduction of a marketing intelligence hub for Austria
- 3) The challenge of data protection - information offensive for tourism companies & tourism businesses

- **Digital infrastructure:**

- 4) Broadband to the hinterland - expansion of wired infrastructure and introduction of the next generation of mobile telephony

- **Cooperation and service bundles:**

- 5) Reward cooperation projects - focus on awards and funding
- 6) Together instead of alone - define uniform data interfaces

- **Promoting the digital transformation:**

- 7) Open up funding programmes - more research and innovation projects in tourism
- 8) Crowdfunding for tourism - new investors for digitalisation
- 9) Obstacle funding modalities - simplification of the funding process

Cultural sector:

- **types of businesses:**

Austria serves the following genres in the cultural sector: classical music, museum, festivals, literature, theater and opera. In addition, there are a number of own buildings in the capitals (operas, festival playhouses, museums). Events in the festival sector last between one day and 4 weeks.

- **number of cultural events:**

In Austria, different types of festivals are offered, namely performing, scenic and musical performances. The classification is based on the type of presentation:

- Classical festivals (in festival halls), - open-air festivals (e.g. Salzburg), - Festivals on lake stages (e.g. Bregenz), - Festivals at historical sites (castles and quarries), - Modern open-air festivals (Zwentendorf, Salzburg).

The largest classical festivals are held in Salzburg (Salzburg Festival) and in Burgenland (Mörbisch). The largest festival for electronic music (electric love) is also located in Salzburg, the largest jazz festival in Vienna (Jazz Fest Wien). According to statistics, most festivals and events take place in Salzburg (Festspiele und festivals [Festivals], 2022).

Technology sector:

- **number & type of businesses:**

Due to the large forest stock, forestry and wood processing industry. Austria is the fifth largest exporter of wood in the world. Austria has a large number of different raw materials, the mining sector is dominated by sand and gravel extraction. One of the largest deposits in the world exists for tungsten. The most important Austrian industrial sectors include metal production and processing, the chemical industry, mechanical engineering, the electrical and electronics industries, vehicles and transport as well as the food industry. Around 1,900 businesses are heavily export-oriented and belong to one of the most active industries. The electrical and electronics industry comprises around 225 companies.

- **technological development:**

The country has significant mineral resources, especially iron ore and salt, and has a long mining tradition. On the other hand, the mountainous structure of the country made exchange and traffic difficult. The development of the railroad network played a decisive role: in the mid-1850s, the Emperor Ferdinand's Northern Railway rolled from Vienna to Prague via Brno.

The mid-1860s saw the beginning of an upswing. Until then, the wood of the dense forests and the water of the mountain rivers had provided enough energy, but now more factories were built and the trades had to switch to coal. The first automobile in the Austro-Hungarian Empire was built in Moravia in 1888. The food industry, especially sugar production based on sugar beets, and paper production, which benefited from the Alpine country's abundance of timber, also developed into important economic sectors.

Demand conditions

In Austria, many archaeological sites are accessible free of charge and regardless of the time of day, but are difficult to reach by public transport, which makes them less attractive to tourists from abroad. Admission prices are very low for private museums in rural areas and medium-priced for museums in the capital cities, although there are reductions for families throughout. Private and club-run museums often have seasonal opening hours or open only 2-3 times a week, preferably on weekends. Some cities offer combination tickets for tourists and visitors, which include public transport and admission to a number of museums in the purchase price. The typical average local in Austria visits the museum twice a year. School classes are the strongest museum visitor in the cities. The 2014 Museum Survey found that 17.3 million people visited Austrian museums that year, with only 562 museums participating in the survey. The highest number of visitors was in Vienna.

Due to increasing demand, more and more cultural sites are being linked with leisure activities in sports sector. Especially along the Danube, the Danube Cycle Path has existed for a long time. This is gradually being linked with museums on the Danube or nearby cultural institutions, but also with

archaeological sites. Cycle paths are being extended, stations for e-bikes installed and shelters set up. A step towards "green tourism" has potential here. There is a separate sector for trade fair and exhibition construction, which is based to a good extent on the cultural track (exhibitions, festivals, events). Many museums have a direct link to a specific sector, e.g., of the economy, industry etc. Therefore, large industrial companies may also have their own museums. For example, from the food and automotive sectors. These combine self-promotion with entertainment and knowledge transfer (the Zotter Chocolate Museum, which follows the concept of showing the history of "Zotter Manufacture" and entertaining (e.g. tasting tours)).

Context for Firm Strategy and Rivalry

Privately run museums and museums that are financed by foundations usually receive hardly any government funding and are often unable to keep up with the latest developments in exhibition design for cost reasons. Many of these museums also have volunteers who are not always well trained. Especially museums that manage to become "Landesmuseum" have a good access to funding, which also has a positive influence on the following exhibitions (after the national exhibition), because the infrastructure has been improved. Many museums have taken advantage of the lockdown period and there has been a strong effort over the past 2 years to update and bring old exhibits up to date. This is also encouraged by the possibility of EU - Leader funding for certain regions.

Related and Supported Industries

The assets of the Austrian culture:

- a lot of different cultural sectors for different target groups (classical music, museum, festivals, literature, theatre and opera)
- a beautiful landscape for natural and green tourism
- are a number of own buildings in the capitals for cultural events
- a strong sales volume during the festivals for all economy sectors (hotels, restaurants, shops, etc.) next to the cultural companies

Many museums have a direct link to a specific sector, e.g., of the economy, industry etc. Therefore, large industrial companies may also have their own museums. For example, from the food and automotive sectors. These combine self-promotion with entertainment and knowledge transfer (picture down below shows the Zotter Chocolate Museum, which follows the concept of showing the history of "Zotter Manufacture" and entertaining (e.g. tasting tours)).

Government

The Austrian Federal Ministry invests special funds especially for the arts and culture sector. This sector will take steps towards ecology and digitalisation, as well as implementing specific concrete renovation projects, like:

- Development of a building culture programme
- Development of a national digitisation strategy especially for the Cultural Heritage
- Redevelopment of the Folklore Museum Vienna and the Prater Studios
- Digitisation offensive Cultural Heritage
- Investment Fund
- "Climate-friendly cultural enterprises" investment fund

In tourism sector uncertainties and ambiguities act as barriers to bookings. Potential guests would like to have clear rules and a constant flow of information about the situation on site. For this reason, "Österreich Werbung" (Austrian Promotion) has created a remedy with the safety campaign #austriacares and produced exactly the content required, like information about the Covid rules and protective measures on site. For instance, Next Level Tourism Austria (NETA) is an innovation

platform at the interface between Austria's traditional tourism structures and the global travel & communication tech scene. The aim is to promote digital innovations in tourism together with the industry. For this purpose, there is also the Austria Experience Data Hub (AEDH). Here, data for planning the journey, descriptions of attractions, admission prices, expected waiting times - this data, which is important for guests - is currently distributed across many different systems. Instead of fragmented (analogue) service chains, convenient one-stop solutions are needed. The Austria Experience Data Hub enables solutions by bundling relevant data and making it available as easily as possible through standardisation. Start-ups can thus create new services and established companies can integrate relevant data into their own ecosystem. The eCampus another platform initiated by NETA. Their aim is to sustainably strengthen the international competitiveness of the industry in the field of digitalisation through knowledge transfer. The eCampus wants to enable learning from one another provide impulses for ideas and network like-minded people.

The Federal Government's Strategy for Research, Technology and Innovation 2030 (RTI Strategy 2030 - adopted at the end of 2020) can be seen as an important setting of the course for the next ten years, which is intended to contribute to sustainable growth and greater resilience of the entire research and economic system with strategic fields of action.

For instance:

- Expand research and technology infrastructure (RTIS) and facilitate access
- Increase participation in EU missions, EU partnerships and IPCEIs
- Promotion and strategic targeting of internationalisation
- Promote excellence in basic research
- Support applied research and its impact on the economy and society
- RTI for achievement of the climate target
- Support researchers and students in developing an international outlook
- Monitoring and evaluation system for the RTI Strategy 2030

1.1.3 Slovakia

Margareta Musilova (MMPIB) and Martin Varga (STUBA)

Brief country overview (focus on the Danube)

Slovakia is a landlocked country located in Central Europe, established in 1993. It is a parliamentary democracy with 150 members of Parliament elected for 4 years. The land area of Slovakia is 49,035 km² and the population approximately 5,449,270 ¹. It is bordered by Poland to the north, Hungary to the south, Ukraine to the east, Austria to the southwest, and the Czech Republic to the northwest. The capital city is Bratislava with population of 475 503³ while the second largest city is Košice with population of 238 138. The segment of the river Danube running through Slovakia is 172 km long ⁴.

The mid and the North of the country is mountainous (Carpathian curve), lowlands (important agricultural areas) are typical of the South and the East. The most important Slovak river the Danube connects the capital city of the SR Bratislava with two capital cities of the neighbouring countries – Vienna and Budapest⁵. Thanks to its position in the centre of Europe, the cultures of the West and

¹ The Statistical Office of the Slovak Republic, 2020, <https://www.scitanie.sk>

East have met in Slovakia over a history spanning several thousands of years. From Celtic settlements, through the remains of Roman fortifications, ancient Slavic cult places, manors and fortified castles of the Ugrian nobility, medieval mining towns, German settlers, the easternmost Gothic sites in Europe, Renaissance and Baroque palaces, Greek Catholic and Orthodox wooden churches, Jewish synagogues and cemeteries, and the interwar functionalism and socialist realism of expanding cities to current projects reflecting the latest trends.

Discover Slovak cities and towns. Horizons of suburban apartment blocks are concealed by preserved historical squares and lanes, often places for pleasant social events. Discover more than a hundred Slovak castles and manors. In some you will find themed exhibitions and festivals; in others you may find authentic ruins with beautiful views over the world of your subjects. Visit museums and galleries. You will find everything from ancient archaeological digs to Andy Warhol's pop art, as well as creations by contemporary artists. Discover war monuments such as tanks from the Second World War in the Valley of Death, or technical sites such as the water mills in the Podunajský region.

Thanks to its position in the centre of Europe, the cultures of the West and East have met in Slovakia over a history spanning several thousands of years. From Celtic settlements, through the remains of Roman fortifications, ancient Slavic cult places, manors and fortified castles of the Ugrian nobility, medieval mining towns, German settlers, the easternmost Gothic sites in Europe, Renaissance and Baroque palaces, Greek Catholic and Orthodox wooden churches, Jewish synagogues and cemeteries, and the interwar functionalism and socialist realism of expanding cities to current projects reflecting the latest trends.

Museum Clusters

As of 31 December 2020, the Register of Museums of the Slovak Republic comprises⁶: 94 museums – 23 state museums, 35 regional museums, 22 municipal museums and 14 private ones. Galleries are registered in a different inventory. Small private museums called “múzejné zariadenie” (museum-like establishment) are registered separately as well.

The Act no. 115/1998 Coll. on museums and galleries recognizes the following categories:

- from a territorial point of view to: a) nationwide, b) regional, c) local (town/municipal) museums;

² Ministry of Interior of the Slovak Republic is a central body of state administration, 2022

<https://www.minv.sk/?statisticke-udaje-o-statnych-hraniciach>

³ Statistical Office of the Slovak Republic, 2022

<https://slovak.statistics.sk/wps/portal/ext/themes/regional/bratislava/>

⁴ The Slovak Hydrometeorological Institute, Základná charakteristika povodia dunaja, Katarína Melová, Viliam Šimor, Ľudovít Ľupták, Branislav Bucha, 2013

https://www.shmu.sk/File/Hydrologia/Publikacna_cinnost/2013/2013_DenDunaja_Melova_kol_Zakladna_c_harakteristika_povodia_Dunaja.pdf

⁵ Facts about Slovakia, 2022, <https://slovakia.travel/en/about-slovakia/facts>

⁶ Enrollment To the Register of Museums and Galleries of the Slovak Republic

(<https://www.culture.gov.sk/posobnost-ministerstva/kulturne-dedicstvo/muzea-a-galerie/register-muzei-a-galerii/>):

- in terms of professional focus and specialization: a) a museum with comprehensive museum documentation of the region in which it operates, b) a gallery with comprehensive gallery documentation of the region in which it operates, c) a specialized museum with museum documentation in selected areas and scientific disciplines, d) specialized gallery with gallery documentation in selected areas;
- museums/galleries established by different founders: a) state administration body (ministries), b) regional self-government (so-called higher territorial units – VÚC), c)
- towns and villages, d) other legal entities (including also private museums), e) natural persons (private museums).
- In order to facilitate the visitors' orientation in various types, the museums are further characterised according to the nature of their collections:
 - specialized museums (natural sciences, technical, national, etc.),
 - open-air museums,
 - castle, chateau and manor-house museums.
- Such a division is not always exact, because some specialized museums may also have an exposition in nature, etc. Castle, chateau and manor-house museums usually manage historical and archaeological exhibitions of the region or city, exhibitions of old fine arts and crafts or housing culture of the upper classes from the Middle Ages to the beginning of the 20th century or a specific museum collection, e.g. musical instruments, toys and puppets, hunting.

National Diamond

According to the World Economic Forum's 2020 report on Travel and Tourism Competitiveness, Slovakia landed 60th position among 140 evaluated countries. In comparison, the other countries on the Danube got higher ranks: Germany on 3rd, Austria 11th, Croatia 27th, Bulgaria 45th, Hungary 48th and Romania 56th place. In the particular pillars of competitiveness in Travel and Tourism, Slovakia's rating was the following: Health and Hygiene - 29; Environmental Sustainability - 30; ICT Readiness - 33; Ground and Port Infrastructure - 40; International Openness - 47; Natural Resources - 48; Price Competitiveness - 71; Human Resources and Labour Market - 55; Safety and Security - 57; Cultural Resources - 59; Air Transport Infrastructure - 113; Prioritization of Travel & Tourism in policy-making - 96; Business Environment - 105.

Strategic plans for development of cities and towns of Slovakia reveal a strong dedication to development in the field of culture (culture and creative potential, protection of cultural heritage), employment (increase of the employment rate, employment in the young age group, marginalized groups), the environment (environmental certification, integrated transport system, bicycle infrastructure). The strategic plans also commonly mention cross-border cooperation with the neighbouring countries.

The economy of Slovakia in terms of Gross Domestic Product increased progressively between 2010 - 2020. It increased from €74,449 million in 2011 to €85,415 million in 2020. Gross Value Added increased from €65,151M to €76,119M in the same period, accounting for 16.9% increase, while GDP increased by 14.8%.

The population of Slovakia did not change significantly between the years 2011-2020. Compared to 5,453,244 inhabitants in 2011, it was 5,460,597 in 2020. Economically active population decreased slightly from 2,741,380 in 2011 to 2,712,712 in 2020. Unemployed population went from 157,744 in 2011 to 181,440 in 2020, or 17.37% and 14.95% respectively.

Slovakia, as a part of the EU, coordinates its employment policies with The European employment strategy (EES). The employment in different fields contributes to the offer in tourism. Tourism can create jobs for qualified and non-qualified people, hence a wide range of population. These are all-year jobs but especially demanding in the high season, which is, in Slovakia, both summer and winter. Data from 2016-2018 were analysed to assess the number of possible employers in the field of Travel and Tourism. In 2017 it was 42,260 and increased by 2% to 43,182 in 2018. Of these businesses, 38% were establishments - 16,230. 85% of the establishments in Tourism are composed of the characteristic businesses like accommodation, restaurants, transport, car rentals, travel agents, booking services, culture, sports and recreation services.

In 2018, 180,729 people worked in Tourism - both business owners and employees. In culture, 49.9% of employees were men and 51.6% women. Majority of people working in culture (93%) are aged between 24-64 years old, half of them 25-44 years old. The ratio of business owners and employees is remarkable - 31,539 jobs compared to 157,487 jobs for employees. Travel and Tourism accounted for 6.8% of employee jobs and 7.4% entrepreneur jobs in 2018.

Municipalities receive direct income from tourism mainly from the local accommodation tax. In a survey of 1426 towns and municipalities, 85% of respondents said that the local tax was not enough to cover the costs associated with the development of tourism. Only 98 municipalities gave a positive opinion, which represents 6.8%.

Until 2019 (the most successful year in the history before the start of the pandemic), tourism growth in the Slovak Republic grew at a rate of 2.5%, which was faster than GDP growth of 2.0%. Revenues from tourism reach 1.5 billion EUR. Tourism generates an added value of 10.84%. State support for tourism for destination marketing organisations in the Slovak Republic is on average €7.5M per year. Subsidies of €105M are expected for the development of bicycle infrastructure.

Tourists that visited Slovakia in 2019 were from neighbouring countries. 31% from the Czech Republic, 9% from Germany and Poland, 5% from Hungary, 4% from Austria and 42% from the rest of the world. The trips of Slovak citizens abroad were highest at 32% in Hungary, 17% in the Czech Republic, 8% in Croatia, 7% in Ukraine, 4% in Poland and 32% in the world. These data are for the year 2019. The pandemic and the geopolitical situation will partially affect the structure of visitors in the years from 2022.

Factor conditions

In Slovakia is located eight sites from the inscribed on the UNESCO World Heritage List⁷ which are Historic Town of Banská Štiavnica and the Technical Monuments in Its Vicinity (inscribed in 1993), Levoča, Spišský Hrad and the Associated Cultural Monuments (inscribed in 1993, extension in 2009), Vlkolínec (inscribed in 1993), Caves of Aggtelek Karst and Slovak Karst (transnational site with HU, inscribed in 1995), Bardejov Town Conservation Reserve (inscribed in 2000), Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (transnational site encompassing 18 European countries, inscribed in 2007), Wooden Churches of the Slovak Part of the Carpathian Mountain Area (inscribed in 2008). Last one is World Heritage Sites related to Roman antiquity important from the point of view Living Danube limes Frontiers of the Roman Empire – The Danube Limes /Western Segment/, (transnational site with AT and DE, inscribed in 2021).

⁷ UNESCO World Heritage List, 2022, <https://whc.unesco.org/en/list/&order=country#alphaS>

An important part of strategy is also Cultural Routes of the Council of Europe in the Slovak Republic⁸. There are four right now Saint Martin of Tours Route, TRANSROMANICA, Iron Curtain Trail and Cyril and Methodius Cultural Route. However, work is constantly being done to expand them for the benefit of tourism.

The Statistical Office of the Slovak Republic publishes the Tourism Satellite Account 2018, which summarizes the sector's contribution to the Slovak economy

The tourism industry in 2018 produced a total value of 9.9 billion EUR. It is a summary of the production of characteristic branches of tourism, which are internationally comparable, as well as branches specific to tourism in the Slovak Republic. The gross value added of all these sectors amounted to 4.8 billion EUR, its value increased by almost 12% year-on-year. Direct added value, which is directly linked to CR, reached the value of 1.96 billion EUR.

In 2018, the tourism sector accounted for a total of 2.74% of the Slovak economy's output, while the sector's share of the country's GDP increased slightly year-on-year. The direct gross domestic product of tourism reached the value of 2.4 billion EUR, which was 10.8% higher year on year.

This follows from the data of the Statistical Office of the Slovak Republic processed within the SATELLITE ACCOUNT OF TOURISM for the year 2018. The CR satellite account provides the professional public with more detailed data on the economic performance of the tourism industry, its share and impacts on the country's economy.

The number of people employed in tourism has been growing continuously since 2013, in 2018 there were 180.7 thousand. Most of them worked in catering services and in passenger transport. Of the total number of employees, 85% were employees and the rest were entrepreneurs. Internationally comparable indicator - the number of full-time equivalents (FTE) reached 177.6 thousand workplaces.

In total, tourism participants spent almost 5.9 billion EUR (expenditures of domestic and foreigners on the territory of the Slovak Republic as well as expenditures of Slovak citizens on trips abroad). Total expenditures increased by 10.2% year-on-year.

The domestic CR was especially successful. Of the three components of tourism, the largest volume was domestic tourism expenditure (2.5 billion euros). This is the expenditure of domestic visitors in domestic tourism in the Slovak Republic. These expenditures reached a year-on-year growth of 5.7%.

At the same time, citizens of the Slovak Republic on their trips abroad (exit CR) spent 1.8 billion on goods and services. EUR and foreigners who came to the Slovak Republic (arrival CR) 1.6 billion EUR.

The highest part of visitors' expenses in the territory of the Slovak Republic (domestic and foreign visitors) went to payments for accommodation and catering services (38% of expenses)⁵³.

The total number of holiday and business trips within the domestic, arrival and departure CR reached the value of 60.9 mil. roads and increased by 9.5% year on year. In Slovakia, domestic visitors and foreigners made a total of 52.6 million trips, of which almost three quarters were one-day trips.

⁸ Cultural Routes of the Council of Europe with network members in the Country , 2022,

<https://www.coe.int/en/web/cultural-routes/slovak-republic>

More than two thirds of trips in the Slovak Republic (37.3 million) were made by domestic participants in tourism, while 74.8% of them were one-day trips and the rest (9.4 million trips) were longer stays with accommodation. Slovak visitors spent a total of 32.9 million in accommodation facilities in the Slovak Republic nights.

Almost 30% of trips in the Slovak Republic were made by foreign visitors, which represents 15.3 mil. roads in Slovakia. One-day visits also dominated the travel of foreigners (64.4%). 5.5 million stays connected with accommodation were used. foreigners who spent 16.7 mil. nights⁹.

Demand conditions

Inflation indicator with a baseline of 100% in 2006 has not changed significantly until recent years. According to the Statistical Office of the Slovak Republic, in 2011, headline inflation was 113.6%, core inflation 111.4% and net inflation 110.2%. In 2022, for the last 4 months, headline inflation was 141.6%, core inflation 139.5% and net inflation 135.0%.

Context for Firm Strategy and Rivalry

The tourism sector is chiefly operated by private businesses. Mainly the hotels and accommodation, restaurants and food service, travel agencies and event agencies are owned by private companies. In the field of culture, local governments have a significant share of ownership, through municipal institutions that provide cultural life (galleries, museums, zoos, libraries). Financing depends on the budget of the city or municipality.

Nevertheless, the monuments of national cultural heritage are often public and a responsibility of the state. A large part of less important monuments, which are included in the list of so-called Monument Boards, are privately owned or owned by the Church. Reconstruction and preservation of these monuments is successful in some cases. The mansions that have been renovated are used for tourism and as restaurants. However, the share of reconstructed buildings is very low due to the lack of finances of the building owners. Creative workshops have recently been set up on the initiative of various associations and other non-profit organisations and are partly run by municipalities.

Related and Supported Industries

The national position of the Slovak Republic on the EU Strategy for the Danube Region aligns with the structure of the draft of the Communication and Action Plan, which consists of four pillars: Interconnecting the Danube Region, Environmental Protection in the Danube Region, Developing Prosperity in the Danube Region, Strengthening the Danube Region. Slovakia guarantees the priorities of clean water and awareness & education. In the last two years, the government has been allocating funds from European sources to develop digitization.

1.1.4 Hungary

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Brief country overview (focus on the Danube)

Hungary is located in the heart of the Carpathian Basin, within the heart of the Danube Basin. The Danube plays a huge role and determines the life of the state. The capital with its almost 2 million inhabitants is located on the two banks of the river, and the people benefit daily from the commerce and transportation possibilities on the Danube. Hungary became a Signatory Party to the Danube

⁹ Statistical office of the Slovak republic, 2020

River Protection Convention (DRPC) in 1994 and joined the EU in 2004 (International Commission for the Protection on the Danube River, 2022). The country is very rich in cultural and natural elements, consequently the number of UNESCO world heritage sites are relatively high because of the territory's wide history from the early ages throughout the roman era up until the 20th century. This location gave home to many different nations, peoples and empires and Hungary benefits from the huge heritage they left here. The river unifies the cultural and the natural heritage for example in the UNESCO world heritage site of Budapest - the sight of the Danube and the historical significance of the city works together from many centuries now. Several UNESCO world heritage sites can be found within the country. We have 7 cultural and 1 natural world heritage site (UNESCO, 2022).

In Hungary, there were 696 museums in 2016 (Orsolya, 2018) and many of them are located within the territory of the formal Pannonia province, inside the country and alongside the Danube. Several museums, collections, archaeological sites and current excavations are active and taking part in presenting Roman archaeology. One of the biggest is the Aquicum Museum in Budapest, but almost every museum has a Roman heritage collection in the Transdanubian area. Many museums and archaeological parks have Roman Festivals, Feasts, Exhibitions and museum pedagogical classes which are offered especially to students studying Roman history in 5th and 9th grade. In Hungary students in primary and secondary schools study general and Hungarian history from 5th grade to 12th grade. Museums and heritage sites offer many possibilities to schools connected to the students' studies. Like this, they are able to visit roman heritage sites when they study roman history (in 5th and 9th grade) and for instance the Cella Septichora Visitor Center in Pécs offers free museum classes for local schools (Zsolnay Heritage Management, 2022).

Throughout history the Danube played an important role in this area from the paleolithic age, but especially in the Roman era, when the river functioned as the border of the province Pannonia. The Limes border had a commercial role connecting the so-called barbarian tribes with the "populus romanus" and also, in times of war the borderline was an important strategic line to protect the Imperium Romanum. After the collapse of the Roman Empire, the area became a territory of many different tribes and a corridor for the great migration. The Hungarian folks came in and marked their country which made the Danube not only an important trading route which connected the Hungarian Kingdom with other countries but also a connection within the country. Big cities and even the capital of Hungary was established along the river: Győr, Esztergom, Buda and Pest. Since the unification of the two parts of the capital - in 1873 -, the fate and role of Budapest is tightly connected to the Danube. It became not only the largest city in population, but the base of all commercial, economic and political power and activities. Consequently, we can say that the Danube had a huge impact in creating and forming Hungary towards the picture we have today.

Tourism plays an important part in the history of the Danube in Hungary. Generally, the New Hungary Development Plan (2007-2013) which aimed mainly world heritage sites and historic towns in Hungary. Nowadays, one can easily find tourist attractions connected to the Danube region⁵⁴. From this selection the archaeological, historical, economic and environmental significance of the Danube is obvious. Only this page is operated by the Danube-Limes Touristic and Meeting Management Non-profit LTD connected to the Limes UNESCO World Heritage Nomination, and collects hundreds of programs, sites, museums, accommodation and entertainment possibilities connected to this region. Connected to this nomination The Hungarian Limes Association initiated many developments along the Danube to promote the touristic value of the Roman limes [for instance in Komárom/Szöny (Brigetio)]. These developments have not started yet due to the cancelled UNESCO nomination. Also, the country's bicycle infrastructure has

⁵⁴ S. Danube-Limes Touristic and Meeting Management, <https://www.danubetourism.eu/en/>

developed in the last few years. An INTERREG project, called “DANUBEPARKSCONNECTED - Bridging the Danube Protected Areas towards a Danube Habitat Corridor” (Danube Transnational Programme, 2022) has mapped not only the possibilities of cycling in the area of the Danube, but its history, culture and entertainment options. The most recent programmes and projects are going on in the UNESCO World Heritage Site of Budapest and its buffer zone. One of these projects is the National Hauszmann Programme (2019-2021) which aims to reconstruct the Buda Castle area (National Hauszmann Program, 2022). Another big project is the Liget Budapest Project in the largest park of the Capital (Városliget, 2022). It involves renewing the whole park area, restoring the old building, creating new cultural buildings and spaces (House of Music) and reallocating already existing museums (Museum of Ethnography).

Regarding the demography of Hungary between 2011 and 2021, the statistical data show that the population of Hungary is decreasing by each year (Hungarian Central Statistical Office, 2022). The reason of this, is that even the migrants coming from other countries are more each year, the number of Hungarians emigrating from the country is 10 times bigger in 2019 than it was in 2011 (Eurydice, 2022).

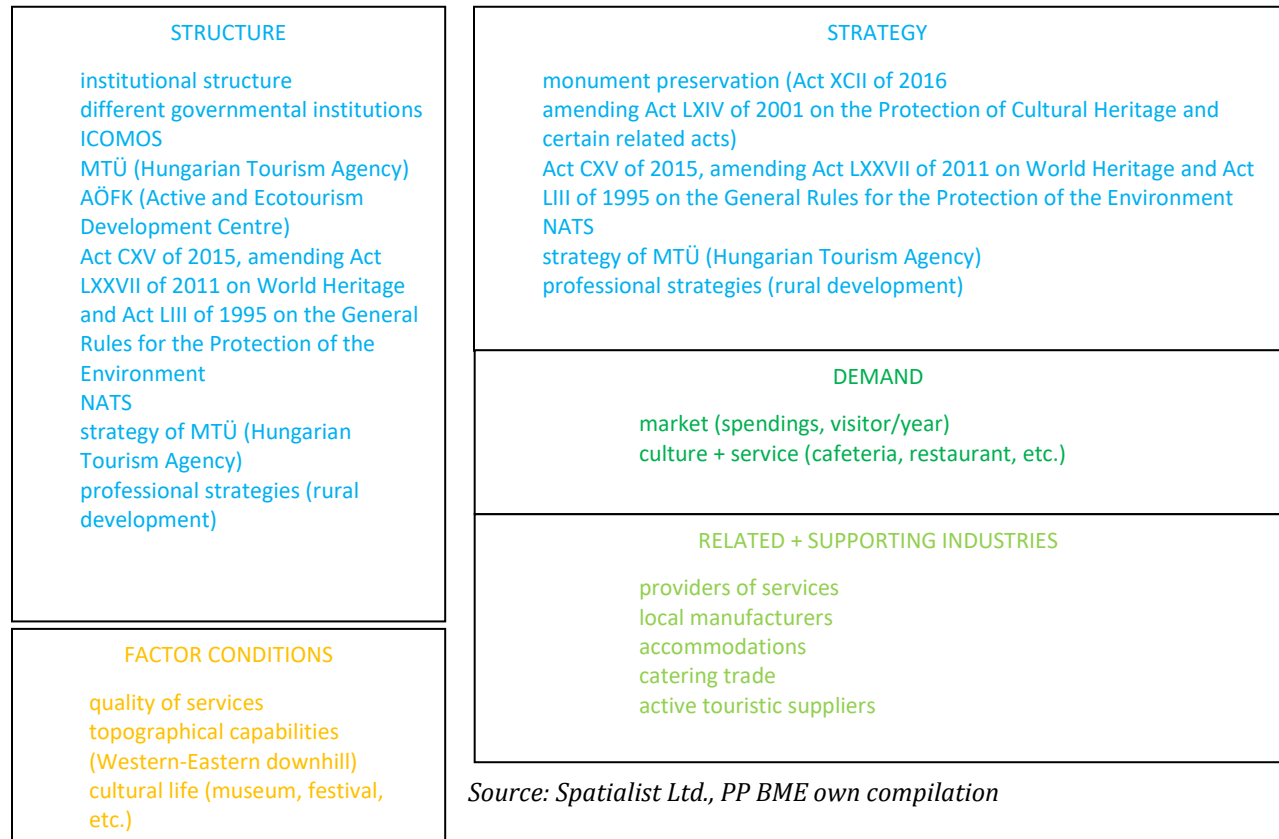
It is hard to precisely state any consequences, but for sure we can say, that those cities which are county centres, and have the most population are also the focus points of World Heritage Sites, heritage sites, archaeological sites, biggest museums and places connected to heritage. According to the KSH statistics we can see that the most populated cities are Budapest, Debrecen, Szeged, Miskolc, Pécs and Győr and many other strong heritage cities are in the list of the 50 most populated cities of Hungary (Hungarian Central Statistical Office, 2022).

Museum Clusters

In Hungary, especially at the Transdanubian area, west to River Danube, a high number of museums have exhibition on the history of Rome, since the main cities has Roman origin. The most important museums and collections located in towns nearby the River Danube having exhibition on the Roman history- and consequently have relevance with the thematic and scope of the Living Danube Limes project are the followings: Hansági Múzeum (Hanság Museum) in Mosonmagyaróvár, Sopron Múzeum (Museum of Sopron) in Sopron, Scarbantia Régészeti Park (Scarbatia Archaeological Park) in Sopron, Klapka György Múzeum (Klapka György Museum) in Komárom, Római Kőtár/Lapidarium Brigetionensia in Komárom, BTM Aquincumi Múzeum (Budapest History Museum Aquincum Museum and Archaeological Park) in Budapest, Matrica Múzeum és régészeti Park (Matrica Museum and Archaeological Park) in Százhalombatta, Intercisa Múzeum (Intercisa Museum) in Dunaújváros, Dr. Soproni Sándor Római kori Kőtár (Dr. Sándor Soproni Roman Age Lapidarium) in Bölcske, Paksi Városi Múzeum (Town Museum of Paks) in /The Open-Air Site of Lussonium, Dunakömlőd. However, in Hungary there is no specific museum cluster of institutions related to Roman monuments/memorials.

National Diamond

Fig. 1. National Diamond – Hungary



Source: Spatialist Ltd., PP BME own compilation

Factor conditions

Within the territory of Hungary, 11 specific touristic areas can be defined with characteristic features⁵⁵. The definition of tourist areas and priority tourism development areas has started in 2016. That year, five priority tourism development areas were delimited mainly for development and investment purposes, considering that the development of tourism at that time level, this approach was justified. Within the framework of the actual, Tourism 2.0 strategy, the priority tourism development areas will be replaced by the 11 tourist areas and the capital – based on the previous list. In these cases, the priority is the development of a unified destination brand based on developments and the unified management of the destination as a tourism product. The brand profile of the regions it is appropriate to take into account the development and tourism performance of the area and it is also important to define the required service development and marketing interventions. The touristic areas named in the strategy are the following: Touristic area of Balaton; Sopron-Fertő; Bük-Sárvár; Tokaj and Nyíregyháza; Mátra-Bükk; Pécs-Villány; Gyula and its Region; Debrecen and its Region; Győr-Pannonhalma; Environment of Budapest; Szeged and its Region and Budapest (It is an unnamed tourist area, but as the largest traffic territorial unit in Hungary, it also plays a key role

⁵⁵ For further information, s. website of the Hungarian Tourism Agency - <https://mtu.gov.hu>

in the Strategy.) Within the strategy, the main factors and elements related to its image are highlighted for each region (TURIZMUS 2.0 [Tourism 2.0], 2021).

In Hungary, the growth in the tourism sector was dynamic in the 2010s. After the economic crisis, tourism worldwide started to expand after 2010, driven by the economic recovery and GDP growth. The Hungarian main output indicators have been on a sustained growth path over the last decade, with the economic growth. As a key factor for the growth of private and other accommodation based on sharing dynamic growth: the number of nights spent in 2014 - the result of the AirBnB boom in Budapest has grown at an average annual rate of around 20% since the start of the AirBnB's business. In contrast, the growth of the hotel segment has been slowing down since 2017. It can also be stated that more than 40% of visitors arrive from the regional countries in Hungary. Nearly three-quarters of the nights spent abroad in rural destinations by tourists from the region as a significant proportion of them visit Balaton and certain settlements with thermal baths. Tourists from Western Europe and other countries of the continent mainly visit Budapest and its surroundings.

Hungary has already 8 properties inscribed on the World Heritage List, that is located both in the capital and both in villages, or sites with natural resources. Among them 7 are cultural properties [Budapest, including the Banks of the Danube, the Buda Castle Quarter and Andrásy Avenue (1987, 2002); Early Christian Necropolis of Pécs (Sopianae) (2000); Fertő / Neusiedlersee Cultural Landscape (2001); Hortobágy National Park - the Puszta (1999); Millenary Benedictine Abbey of Pannonhalma and its Natural Environment (1996); Old Village of Hollókő and its Surroundings (1987); Tokaj Wine Region Historic Cultural Landscape (2002)] and 1 is natural [Caves of Aggtelek Karst and Slovak Karst (1995, 2000)]. Therefore, both international tourists prefer the capital, both domestic tourism prefers the countryside and natural sites can find the ideal destination. We can see that among these properties there is no specific site that has relation to Roman history, therefore the nomination of the 'Frontiers of the Roman Empire - The Hungarian section of the Danube Limes' has an absolute relevance in Hungary.

Demand conditions

According to the statistics of the Hungarian Tourism Agency, in the year 2016 the number of tourists was 13 million, which increased in 2019 to 16 million, and the aim for 2030 is 20 million. Direct and indirect contribution of the tourism to the national economy as a share of GDP was 11,8 % in 2016, 13,2% in 2019, and the aim in 2030 is 16%. National number of nights spent in accommodation was 34 million nights/year in 2016, 43 million in 2016, the aim for 2030 is 50 million, and generally, the 10-11% of it is in Budapest.

In line with international trends, the spatial distribution of tourism in Hungary is not even. In 2019, the capital received two-thirds of the 7.8 million foreign tourists. Domestic tourism is mainly concentrated outside of Budapest. In 2019, less than 10% of the 8.7 million domestic tourists staying in accommodation in Hungary visited the capital (Hungarian Central Statistical Office- KSH, 2020). The seasonality of tourism demand is stronger in rural areas, than in the capital. Visits to the capital city are on the rise the growing popularity of Budapest as a tourist destination demand in Budapest has fallen by about a quarter in recent years, but the summer months are still double of January and February. As traffic in rural destinations is essentially driven by domestic demand, the reduction in seasonality has been only around 10%, so that peak summer traffic is still almost four times higher than in the off-season. In recent years, international tourism demand growth has slowed somewhat and started to change.

The number of foreign tourists visiting Hungary in 2019- reached 7.8 million in 2019, representing an annual average growth rate of around 9%.

The COVID-19 pandemic crisis has led to a drastic drop in international travel demand. In Hungary in 2020 the number of foreign visitors had increased by 78%, the nights spent abroad by 73% compared to the previous year.

In 2019, 40% of the Hungarian population participated in a domestic trip of several days. Domestic tourism is characterised by a predominantly by car, and in almost a third of all trips no accommodation is paid for, as tourists stay in their own property or with relatives or friends (Századvég, 2020). Expenditure per overnight stay typically 11-14 thousand HUF for multi-day trips depending on the type of trip and the number of overnight stays destination. According to the research, domestic trips can be divided into five main types: "Waterfront holidays", which typically involve natural waters, Family-related tourism accounts for around with visits to relatives, "Wellness and Spa" trips are most common in autumn and winter, Cultural programme trips, "Gastro-trips" characterise the February-March period.

Based on the purpose of travel, 8 classic tourism categories can be defined in Hungary: Wine and gastronomic tourism (catering), Health tourism, MICE segment (business events and congresses), Cultural tourism, Religious tourism, Event tourism, Active and ecotourism.

It can be stated that the touristic attractiveness depends on the additive (generally gastronomic) facilities.

Context for Firm Strategy and Rivalry

In the year of 2019, the budget expenditure on culture as a percentage of GDP was 1,2% in Hungary.⁵⁶ In the year of 2020 the budget expenditure on culture as a percentage of GDP increased to 1,4%. This budget includes expenditure on publishing of books, music and newspapers, radio and television broadcasting, public cultural activities, artistic activities, zoos and botanical gardens, national parks, historical monuments and other entertainment and cultural activities. This amount was 567 632 million Hungarian Forints. Within this budget, the amount for the museums and archives was 67 933 million HUF, that is the 12% of the overall budget spent for culture; and the amount for historic sites activities was 70 740 million HUF, that is the 12,4 %.⁵⁷

In the year of 2019, the total amount of museums was 700, that decreased to 676 in 2020. The number of employed persons in 2019 was 7071, there were 48 661 official events and 89 097 guided tours. In all of this amounts there was an increase according to the previous years.⁵⁸

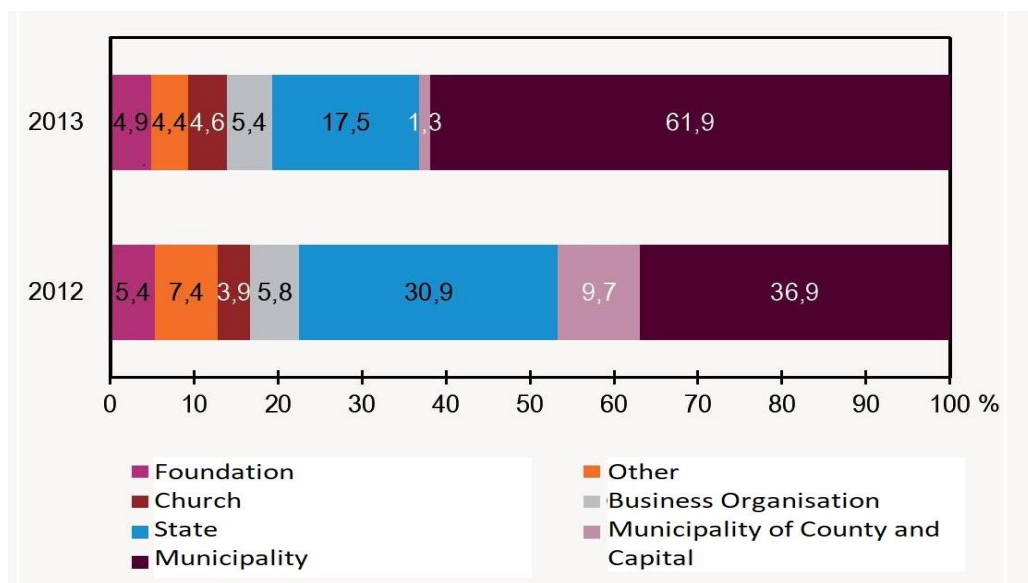
In the year of 2019, the number of museum visits per thousand inhabitants was 1183 (during the calculation of the number of visits, each visitor is counted as many times as the number of exhibitions visited).⁵⁹ Museum traffic has also been severely affected by the restrictions imposed by the Covid19 pandemics, therefore the number of visitors of the museums in 2020 was the third of the previous year, total of 482.

⁵⁶ Based on Hungarian Central Statistic Office (KSH): https://www.ksh.hu/kultura?lang=hu&fbclid=IwAR2iPY-JZLG47t5zmCrZN8GGnOyYILmInInZZNv-TQ6l2CoEF_zRTsZQmc

⁵⁷ Based on Hungarian Central Statistic Office (KSH): https://www.ksh.hu/stadat_files/ksp/hu/ksp0003.html

⁵⁸ Based on Hungarian Central Statistic Office (KSH): https://www.ksh.hu/stadat_files/ksp/hu/ksp0008.html

⁵⁹ Based on Hungarian Central Statistic Office (KSH): https://www.ksh.hu/kultura?lang=hu&fbclid=IwAR2iPY-JZLG47t5zmCrZN8GGnOyYILmInInZZNv-TQ6l2CoEF_zRTsZQmc



**Figure 1:
 Owners and
 Operators of the
 public
 collections in
 2012 and 2013**

Source:
 Hungarian
 Central Statistical
 Office (KSH)
 (Hungarian
 Central Statistical
 Office (KSH),
 2022)

According to 2013 statistics, nearly 80% of public collections (museums, libraries, archives) are owned and maintained by the state or local government. Museums can be state, municipal, private, foundation or church-run. They are national, national specialised, county, regional, thematic museums, or collections and exhibitions of public interest. By professional classification, all museums are almost of the total number of museum institutions and exhibition spaces of public interest that do not meet the museum requirements, but but are authorised by the Minister to carry out this activity. In the majority of cities (76%) there is a museum institution, the few municipalities have any kind of - landscape museum, museums, open-air ethnographic museums. In 2013, the majority of visitors preferred museums in the cities. Museums in Budapest accounted for nearly 42% of visits, while those in the municipalities accounted for only 10%. In 2013, the 30 most popular museums accounted for 56% of all visits. The capital is also notable in this respect, with 10 museums accounting for nearly 76% of visitors.⁶⁰

The tourism sector has specific financing needs due to its SME-focused business structure and its unique risk profile. In many cases, development projects are not carried out due to lack of access to finance and liquidity. Results of surveys among the actors in the sector the development planned by businesses is one of the most the lack of access to finance and liquidity. The survey found that 37% of tourism businesses in rural areas and 28% in Budapest postpone developments because of lack of liquidity.

Some of the characteristics of the sector make tourism businesses often face difficulties in access to adequate sources of finance (based on the Hungarian Tourism Agency's report):

- Physical services and location: accommodation and catering, which make up the bulk of the sector services and spas, that are a major part of the sector, are essentially labour-intensive, cyclical and geographically limited in their activities, and therefore more risky.
- Low capitalisation of businesses

⁶⁰ Based on Hungarian Central Statistic Office (KSH):
<https://www.ksh.hu/docs/hun/xftp/idoszaki/kozgyujt/kozgyujt13.pdf>

- Low coverage due to lack of fixed assets
- Low demonstrated profitability
- Lack of financial literacy in enterprises

The tourism sector is characterised by a very high share of micro, small and small and medium-sized enterprises. Local micro and small enterprises make up more than 98% of the sector's actors (Hungarian Central Statistical Office- KSH, 2020). Therefore, for SMEs, different supported financing opportunities, such as loans, guarantees, equity investments can provide support for their work.

Related and Supported Industries

The built heritage and heritage sites will continue to be the most important attraction for cultural travellers, but the weight of each sub-product is changing. The share of galleries, performing arts and festivals is steadily increasing, while museums are becoming more visitor-friendly, providing interactivity and entertainment in classical settings. Visits to the city are becoming increasingly important, and places with a lively, atmospheric, and welcoming atmosphere are particularly attractive to tourists. The rise of experiential tourism and the spread of digital technologies also offer an excellent opportunity for the further development of cultural tourism.⁶¹

Museums provide a wide range of cultural opportunities for all ages. In addition to exhibitions, they also host a variety of events not traditionally found in a museum setting. They also host concerts, theatre performances, tea parties and craft activities. Important activities of museum institutions include school-based school education, from pre-school through to the university years. In 2013, nearly 27,000 museum education sessions, the vast majority - 61% - for primary school pupils. These events are attended by an increasing number of children each year - last year more than 627,000 children and young people. The interest is growing leisure activities, with more than 74,000 participants and more than 2 million participants. Guided tours accounted for 84% of all organised activities, with 49% of all visitors taking part. To keep interest alive, a number of since-popular a series of programmes that have since become popular.

Following the French example, the Night of the Museums, which was launched in France, is a special feature of the event. to visit all the museums all night long with the purchase of a single ticket.⁶²

The variety of the different types of museums provide a wide spectre that meets with the different pretensions of visitors (national parks, rural tourism, open-air museums, festivals, service providers such as local halls, accommodation providers, catering industry, active tourism platforms).

The Hungarian State has a public support body with the aim of developing the active and ecotourism. The most important task of the Development Centre for Active and Ecotourism⁶³ is to coordinate investments and developments in the area and the work of the state, local government, civil society and business actors involved in the area. The resulting network will help develop new tourism packages and products. The Centre will shape the image of active and ecotourism in Hungary and promote the resulting developments both in Hungary and abroad.

⁶¹ See.: Tourism 2.0 Strategy (https://mtu.gov.hu/documents/prod/NTS2030_Turizmus2.0-Strategia.pdf)
Page 45.

⁶² Hungarian Central Statistic Office (KSH):
<https://www.ksh.hu/docs/hun/xftp/idoszaki/kozgyujt/kozgyujt13.pdf>

⁶³ <https://aofk.hu/>

The Ministry for Innovation and Technology supports new cycling and public transport developments to boost inland tourism, with more and more environmentally friendly options for hikers.⁶⁴

The following **market actor groups** can be taken into consideration:

- **Customers:** public institutions, municipalities, private investors, developers, ...
- **Task providers:**
 - (accredited) companies, in the case of large investments, they may be involved in preventive exploration for certain overlooks.
 - services, local producers, accommodation, catering
 - private operators selling the own products

The following **social actor groups (national and international public organisations)** can be defined:

- National: Hungarian Academy of Sciences - Archaeology Committee, Hungarian Archaeological Association (MRSZ), Pulszky Society - Hungarian Association of Museums, Hungarian Society of Archaeology and Art History, Association of National Public Collections, Association of Hungarian Rural Museums, Volunteers - Community archaeology
- International: ICOMOS, ICOM, EAC, UISPP, ICCROM, WAC, EAA

As an example of organisations that are not specifically connected with Roman thematics but can be identified as similar associations as benchmarks for the museum cluster are the followings:

- Pulszky Society - Hungarian Museums Association (there are different branches of this association, but not related to different periods, but by age and type of museum. The Society deals mainly and specifically with museological issues)
- National Association of Public Collections - OKSZ (only includes public collections with a national collection: museums, archives, libraries and their managers: it deals with professional-political rather than professional issues).
- Association of Hungarian Rural Museums - MVMSZ (as the name suggests, a professional organisation representing the rural museum sector)
- Hungarian Archaeology and Art History Society - MRMT (composed of individual professional members, the main focus is on the exchange of scientific results)
- Hungarian Archaeological Association - MRSZ (mainly dealing with organisational, legal and professional issues related to archaeology)
- Apart from these, there is also the Society of Prehistoric Archaeology and the Association of Young Migration and Early Medievalists.

Government

In 2017, the Hungarian Tourism Agency presented the National Tourism Development Strategy 2030 (NTS2030) based on the Government Decree 38/2012 (III. 12.) on Government Strategic Management as a policy strategy for the sector of tourism. The review of the strategy is particularly timely the changing sectoral and general economic situation due to the COVID-19 epidemic crisis - demand, supply and demand for the sector's products and services. and labour market conditions. Although the epidemic crisis is the primary driver for the further development of the strategy, the

⁶⁴ <https://kormany.hu/hirek/uj-kerekparos-es-kozsosegi-kozlekedesi-fejlesztések-segitik-a-belfoldi-turizmust>

definition of the orientations set out in the key principles have been defined earlier and in line with a long-term perspective.

In the case of Hungary, the schematic list of relevant government actors is as follows:

Government actors (state, municipal institutions)

- **Prime Minister's Office** (the field of Architecture, Building and Heritage Protection is represented on the level of Deputy State Secretary)
 - Committee of Excavations (Advisory Board on Historic Monuments, Committee on Cultural Heritage)
 - NÖF (NÖF National Heritage Protection Development Ltd. was established to perform national cultural heritage protection tasks. As an active player in the protection of the built heritage in Hungary, it operates more than 50 listed buildings. In addition to developments to preserve our built heritage, our portfolio also includes priority public investments. The related tasks include the development, implementation and coordination of heritage-based projects supported by EU and national funds, as well as the development of priority national heritage protection programmes and projects. Another key activity is the maintenance of the development of heritage sites in our portfolio through tenders. The NÖF coordinates the development of the National Castle Programme and the National Castle Programme. Within the framework of this programme, the Government of Hungary and the European Union are providing funding for the reconstruction and conservation of 30 monuments - 18 castles and 12 fortresses - throughout Hungary. Our aim is not only to renovate the exteriors and interiors of these buildings, but also to bring them to life with a variety of programmes and events. On behalf of the Hungarian State, the ownership of the NÖF National Heritage Protection Development Nonprofit LTD is vested in the Prime Minister's Office, represented by the State Secretary for Public Administration, who is responsible for the ownership and professional management of the company.)
 - Várkapitányság (The Várkapitányság Integrated Regional Development Centre Nonprofit Ltd. is a state-owned public benefit organisation operating under the Prime Minister's Office, which is engaged in the asset management, preparation, implementation and day-to-day operation of the state-owned historical monuments in the Palace of Buda and its surroundings, as well as the green areas in this area. It is also responsible for the renewal of the Citadel and the Visegrád monument complex.)
 - Within government offices: Department of Building and Heritage Protection
- **Ministry for Human Resources (EMMI) - Department of Museums**
 - Hungarian National Museum
 - State museums
- **Ministry for Innovation and Technology (ITM)**
 - Universities
- **Ministry for Interior Affairs (BM)**
 - county-wide town museums
 - town museums

- **Ministry for Agriculture**
 - National Park Directorates (NPI)

1.1.5 Croatia

Mislav Fileš and Ivana Ožanić Roguljić (IAHR)

Brief country overview (focus on the Danube)

The region of Slavonia is located in the southwestern part of the Pannonian Basin. Its borders are marked by the Drava, Sava and the Danube rivers. In the west, the region consists of the Sava and Drava valleys and the mountains surrounding the Požega Valley. At the same time, in the east, rolling planes are the predominant geographical feature of this region. Slavonia enjoys a moderate continental climate with relatively low precipitation. According to the national census, the population of the five counties of Slavonia was 806,192. The largest portion of the total population is in Osijek-Baranja County, followed by Vukovar-Srijem county. Požega-Slavonia County is the least populous county of Slavonia. Highest density is recorded in Brod-Posavina County and the lowest in Virovitica-Podravina county. Osijek is the largest city in Slavonia, followed by Slavonski Brod, Vinkovci and Vukovar. Results of national census from 2001, Croats account for 85.6 percent of population of Slavonia, and the most significant ethnic minorities are Serbs and Hungarians, comprising 8.8 percent and 1.4 percent of the population respectively. The most widely used language in the region is Croatian, spoken by 93.6% of the total population, followed by Serbian (2.6%) and Hungarian (1.0%). Slavonia has one university—Josip Juraj Strossmayer University of Osijek—as well as three polytechnics universities in Požega, Slavonski Brod and Vukovar, as well as a college in Virovitica—all run by the ministry of education. The University of Osijek has been established in 1975. From 2010 onwards municipal initiative has been aimed towards information technologies and as such Osijek has become an IT center of the region with incentives for start-ups in this field.

The Pannonian basin through the period of prehistory had been an important region and a cultural melting pot of different cultures arriving from Central Europe, East Asia and the Balkans from the first farmers and herders until the arrival of the iron weapons and tools in the last millennia BC. In the first century BC, the predominant population of the, what would be nowadays Croatian part of the basin, was populated by the Celts. What would be known as the province of Pannonia of the first century was first mentioned and even conquered to some extent by the Romans during Augustus' campaign in Illyricum from 35-33 BC with successful siege and capture of Segestica, later to become the Roman town of Siscia marking the northernmost point of Roman military conquest during the campaign. Siscia becomes a substantial military base for the control of the western Pannonia in the period of Augustus's reign. In the 6th year AD, a significant revolt of indigenous tribes from Illyricum sparks from the conscription and levying of tribute for the war with the Marcomanni. The uprising would be named the Great Illyrian Revolt or Bato uprising since leaders of the tribes leading the revolt were Bato of the Daesitiates with allies in Bato and Pines of the Breucii tribe. The rebellion was quenched by Tiberius in 9 AD. By the end of the revolt, the province known as Illyricum was divided into Dalmatia and Pannonia.

Compared with other countries that share the Roman Danube Limes, the Croatian part is relatively short, stretching only 188 kilometres. In this short stretch, a system of forts, watchtowers and fortified cities, all well connected with a road network, have been identified on the Croatian part of the Roman Danube Limes. In the first half of the 1st century, Romans did not yet start to fortify their eastern border on the Danube but relied on alliances of their vassal tribes on their eastern frontiers,

with the most significant threat being the Dacian tribes across the Danube. Big projects of fortifying the Danubian Limes can be traced in the time of the Flavian dynasty with the culmination in the next century during the reign of the Roman emperors Trajan and Hadrian. During the reign of emperor Trajan (98-117 AD), Pannonia was first divided into two separate regions of Pannonia Superior and Inferior, with Carnuntum and Aquincum, respectively, as the provincial capitals. The reasoning behind this administrative division lies in the looming threat of barbarian tribes from the left bank of the Danube, mainly Quadi and Sarmatians. The second half of the 2nd century is marked by the constant danger and border conflicts and incursions by most-ly Marcomanni tribe with Qudai and Sarmati in a close second. After the brief peace and prosperity during the reign of Septimius Severus, mostly due to the support of Pannonian provinces in the civil war from which he emerged victoriously, Pannonian provinces enjoyed a short era of respite. With the end of the Severian dynasty, Pannonian provinces were pushed back in the turmoil of internal strife and conflict known as the crisis of the 3rd century. The crisis within the Empire allowed the tribes on the Danube border to raid and pillage unchecked.

Notable in this were the Carpi and Sarmatia, with infamous raids in 242 AD and 260 AD, respectively. The province of Pannonia Inferior was also a scene of battle between emperor Galien and usurper Indigenus. The crisis of the 3rd century was over with the emperor Diocletian rising to power. His reforms managed to preserve Roman Empire for another century and a half. Under Diocletian rule (284-305 AD), the provinces of Pannonia Superior and Inferior were divided into four smaller provinces Prima, Secunda, Valeria and Savia. Unfortunately, Diocletian's reforms only managed to preserve so much. Pannonia Secunda was a scene of the largest battle of Late antiquity if sources such as contemporary historian Zosimus can be trusted. The combatants of the battle itself were emperor Constantius and usurper Magnentius, both Romans. Sources mention 54 000 casualties and the Pyrrhic victory of legitimate emperor Constantius. Such an enormous body count weakened all other efforts to defend the Roman border of the Pannonian provinces, and from the end of the 4th century to the fall of the western roman Empire in 476 AD. We can trace numerous barbarian invasions and settlements within the borders of the Empire, with culmination during the invasions of Huns and Ostrogoths in the 5th century. In the 6th century, invasions of the Avars and Slavs on this territory had started, and Slavic people remained as the predominant population of the aforementioned area. The Pannonia was later incorporated into the Kingdom of Croatia in the 10th and 11th centuries; after its decline, the kingdom was ruled through a personal union with Hungary.

From the 12th century, Slavonia became part of the Kingdom of Hungary and stayed until the 16th century, when it was conquered and became a part of the Ottoman Empire. At the very end of the 17th century, after the Treaty of Karlowitz, Slavonia fell under the Habsburgs and, following the historical events, became part of the Austro – Hungarian Empire in 1867 and a year later, it became part of the Kingdom of Croatia-Slavonia. After the First World War, Slavonia became a part of the Kingdom of Serbs, Croats, and Slovenes, which became the Kingdom of Yugoslavia. The end of the Second World War saw Slavonia become a part of the Socialist Republic of Yugoslavia. During the Croatian War of Independence of 1991–1995, Slavonia saw fierce fighting, including the 1991 Battle of Vukovar. The economy of Slavonia is largely based on the processing industry. A significant component of its economy is agriculture: Slavonia contains 45% of Croatia's agricultural land and accounts for a substantial proportion of Croatia's livestock farming and production of permanent crops. The gross domestic product (GDP) of the five counties of Slavonia is worth 6,454 million euros or 8,005 euros per capita, 27.5% below the national average. The GDP of the five counties represents 13.6% of Croatia's GDP.

Museum Clusters

Starting from the north, in the Baranja region, unfortunately, so far, no museums which focus on Roman heritage exists. But recently, several of the 18th-century castles have been undergoing renovation, and at least two new museums are planned in the next three years. This is accompanied by recent excavations and non-destructive geo prospections being carried out here in this region. New archaeological findings show several important sites which could in the near future be presented as open-air sites. The biggest city in the area, Osijek, is the location of two of the central regional museums. The most important one, which houses the collection of Roman finds from the Roman Danube Limes, is the Archaeological Museum Osijek. Right across the square is the Museum of Slavonia, which, alongside historical and ethnological exhibitions, houses the permanent exhibition of Roman stone inscriptions in the museum's lapidarium. Depots of both of the aforementioned museums are filled with archaeological material coming from the regions of Slavonia and Baranja. Travelling along the river Danube downstream, one reaches Vukovar, a small city on the banks of the river Danube. Vukovar is home to the municipal museum, which houses a small collection of Roman finds from the city and its vicinity. Next to the town is an eponymous site of Vučedol, which gives the name to the Vučedol culture of the late chalcolithic and early bronze age period. A site is also a place of a Vučedol culture museum, an architecturally impressive building right next to the site itself. Even though the site of Vučedol has several chances to find, this was never the aim of excavations here, and no roman finds are to be found in the museum. They are all housed in the Vukovar municipal museum. The last museum before the border with Serbia is the Ilok municipal museum. This small municipal museum is also built (although by chance). The museum houses several of the Roman periods find. Unfortunately, none of the museums is part of already existing museum clusters.

National Diamond

In the Danube area of Slavonia, there are several existing tourism opportunities that can be easily integrated with the Roman heritage along the Danube. Firstly, it's the food and drink. Gastronomy and food industry in general is the big factor especially in Baranja region. Specific blending of culture led to interesting gastronomic output in this region. Alongside is the wine production. Both can be tied with the potential Roman storytelling. Secondly, natural beauty of the Danube is something that is heavily promoted as a tourist attraction of this region. With its green travel, predominantly cyclo-tourism is something that is developed and constantly expanding in this region. Lastly, natural reservations and places of special ecological care are abundant in this region and in many cases overlap with archaeological sites so the possibility here are also multiuse.

Factor conditions

So far, the Mura-Drava-Danube Transboundary Biosphere Reserve, which Croatia and Hungary share, remains a solitary UNESCO site in the region. Upon this topic, an incredible Nature park Kopački rit and its visitors centre has developed its steadily growing base of visitors. Cultural events count many Film and Theatre festivals, but no event with archaeology has been established so far. A living history group exists that revives the 18th century period in Osijek and its hinterlands since many Habsburg castles still exist in the region. In the last year, two big renovation projects of those castles have started, and hopefully, there will be a place for presentation for Roman heritage within the museums.

Demand conditions

Museum in Osijek, such as archaeological museum Osijek and Museum of Slavonia in Osijek, and Visitor centre Kopač rit are based on primarily domestic tourists visiting Osijek and the broader

region of Slavonia on daily and weekend excursions. A small percentage of visitors are foreign tourists, mostly from neighbouring Hungary. Vukovar and the museum of Vučedol culture are tapping into the same visitor base mainly formed out of residents and domestic tourists. Unfortunately, data for the Ilok museum is unavailable.

Context for Firm Strategy and Rivalry

So far there are only government institutions working with cultural heritage of this region, so any cooperation is the norm regarding the mentioned topic.

Related and Supported Industries

Osijek is becoming a centre of information technologies in Croatia increasingly. So far, this branch of industry is small compared to other units that are predominant in this region. Still, it shows a remarkable possibility of integration with the cultural heritage.

Government

The national government supports the Ministry of Culture all of the investigation and prospection of the Roman Danube Limes and helps the UNESCO nomination of the aforementioned cultural monument. So far, several research campaigns have been financed and carried out by several government-funded archaeological institutions along the length of the Danube River.

1.1.6 Serbia

Nemanja Mrdjic (Institute of Archaeology Belgrade)

Brief country overview (focus on the Danube)

The Danube region in Serbia still is as it was in the past backbone of river communication, trade and border zone. Today Serbia shares Western part of Danube flow with Croatia and holds the left bank that in Roman times belonged to Barbaricum. Central section of Danube flow is through Serbia entirely where both banks belong to our country – holding both limes as well as bridgeheads in Barbaricum. The last section to the east of Veliko Gradište Serbia shares with Romania – holding the right bank of Danube that remained within the Roman Empire through all six centuries of Roman presence here.

The two largest and economically strongest cities of Republic of Serbia lay on the Danube banks – Belgrade and Novi Sad. Historically Danube banks were always both trade route and border of different nations and civilizations – Rome and Barbarians, Hungary and Serbia, Ottoman and Hungary, Serbia and Austro-Hungary.

Roman heritage in Serbia is widely visible and widely recognized. It was one of the focuses of major salvage projects within the Iron Gate region. The only archaeological UNESCO world heritage site in Serbia is Roman imperial palace at Gamzigrad (*Felix Romuliana*). Together with serial transnational nomination of the Danube Limes, Government of Serbia promoted project and cultural route Itinerarium Romanum Serbiae (Road of Roman Emperors in Serbia) as part of National strategy for future development. This project entered the Serbia 2020-2025 investment plan. Unfortunately, COVID-19 pandemic had high impact on situation in Serbia and elements of this plan are put on hold. With the stabilizing of health situation, it is expected to restart activities on development of this highly important cultural route. Most of the cultural route Itinerarium Romanum Serbiae is related to Roman sites along the Danube and together with the UNESCO nomination of Frontiers of the Roman Empire these sites got enormous boost. After large salvage projects in Serbia during 1960-ies

and 1980-es sites that were not in the immediate danger were left passive and untouched. They are recorded and documented but no further research was conducted. Now there are 35 sites in focus and national and regional institutions become active with the mutual goals.

Sites along the Danube are among the most important in Serbia. Both legionary fortresses in Serbia are on the Danube (Singidunum and Viminacium). Imperial city of Sirmium and imperial palace in Gamzigrad are in close hinterland of Danube. Unique marvels of military architecture stood on the Danube banks. In the Iron gates as mountain slopes went vertically into the river there was no space to place the limes road. It had to be cut into the rock of the mountain sides. This enormous undertaking made with no machinery but only by the hands of legionaries was celebrated by 9 imperial tablets. Of these only 3 are still *in situ*. Three are relocated and three are lost or destroyed over the time. One of the longest bridges of antiquity – Trajan's bridge at Kostol (*Pontes*) still has visible peers standing on the riverbanks. Iron Gate as combination of the National Park, UNESCO Geopark and archaeological sites composes one of the most beautiful capital touristic and heritage resources.

Serbia has constant and rapid combined aging problem and decrease in population that is enlarging since 1990-ties. Economic migrations are changing structure within Serbia in two ways. Locally population is moving into the large cities, predominantly Belgrade. Internationally economic migration is present and enlarging for decades. Majority of migrants move to western Europe (Austria and Germany dominate) as these countries have better living standard, higher income and remain close to the homeland.

For the presentation of cultural heritage this has enormous impact. Fields remain non cultivated what naturally leads to overgrowing vegetation that is an obstacle for any kind of research or presentation. During pandemic 2020-2021 absence of property owners that live abroad and who were not able to come to Serbia disabled archaeological or geophysical research as they demanded their presence during scientific activities. Absence of owners also leaves possibilities for looters to plunge their fields undisturbed. All these issues are widely present along the Danube region and with special emphasize on region of Eastern Serbia.

Depopulation effects all public services, production or educated specialists that can work in protection or presentation of cultural heritage. There is special lack of accommodation in Eastern Serbia where some of the cities are reduced to 30% of population, they had 50 years ago. Completely uninhabited villages are not an uncommon for the last decade. This lack of skilled labour also stops investors from building industrial or tourist complexes widely what again has the result of unemployment and results in further increase of migrations.

The situation with depopulation has strong impact on economic strength of municipalities in Eastern Serbia that on the other hand has some of the most and best-preserved archaeological sites along the Danube. This means that municipalities on their own are not in position to adequately provide protection and maintenance of heritage sites.

These problems combined lead to complete lowering of presentation potentials, investments in culture and heritage. Weak potential of municipalities that cannot resolve problems on local level demand strong help from national government if there is any will to proceed with protection and presentation of cultural heritage.

The other problem lies in local migrations. Belgrade is enlarging with rising population and economic development. Investors are working closely with politicians and with new investments spreading over or close to the archaeological sites. This is problematic for the sites that are already on the national tentative list and UNESCO with Europa Nostra already had multiple interventions. Investments in building complexes and public parking garages in the Belgrade are among the largest problem this nomination is facing at the moment.

Museum Clusters

There are 151 museums in Serbia in total. Of this number 36 are located in Belgrade, 68 in central Serbia, 45 in Vojvodina, and 2 in Kosovo and Metohija. Out of this number only 9 museums hold archaeological materials and are located along or in close vicinity to the Danube and can be involved in Roman limes heritage and UNESCO world Heritage sites presentations.

Majority of museums are working independently without close cooperation especially city and regional ones that are financed by municipalities. National Museum cluster is organized around National Museum in Belgrade as the central national museum institution. Level of developed cooperation is strongly related to the level of financing. Municipalities, that in majority lack financing for cultural or heritage institutions have weak potential to bust museum activities. These are mostly reduced to local small-scale events without wider coordination with small number of visitors / participants.

Serbian Archaeological Society is the most important professional organization keeping inter museum cooperation live. Serbian Museum Society is also very active but lacks potential to significantly change situation on local levels.

ICOM as the most important international organization is present mostly in largest national level museums. There is a lack of institutional membership that is reduced mostly to individual experts as members in smaller regional museums.

National museum in Belgrade, Vojvodina Museum and other city and regional museums all have archaeological collections and are entitled by the law to provide housing for archaeological materials and their presentation. Most common problem is that many of these museums do not have archaeologist in the employee lists because of the reduced local financing.

Largest museums related to the presentation of Roman heritage along the Danube are located in the Belgrade (National Museum, Belgrade city Museum) and Novi Sad (Vojvodina Museum and Novi Sad city museum). Archaeological Museum of the Iron Gates, that is located in Kladovo, is part of the National Museum from Belgrade. This museum is holding the majority of archaeological finds from the salvage projects Iron Gates I and II excavated in campaigns 1965-1970 and 1980-1984. The newest addition to museums in Serbia is establishment of the Archaeological Museum at Viminacium Archaeological Park. This museum is an integral part of the Institute of Archaeology and the only on-site museum in Serbia. This museum is planned to present on site archeological finds from Viminacium Roman city, legionary fortress and adjacent cemeteries.

National museum in Belgrade and Museum of Vojvodina are holding the top artifacts and must be focal points for museums along the Danube. But these museums are also the best financed and have ability to organize exhibitions and events. Problem lies in smaller museums where most of the support should be allocated. They all house archaeological artefacts in permanent collections, but these are rarely changed or enlarged. Temporary exhibitions are often not related to archaeology and

small number of available personal (in most cases only one archaeologist) makes all activities rare and slow to hold. Joint institutional approach, supported by the ministries and better coordination, as well as mutual actions could provide the step forward in good direction.

The only major cultural cluster in Serbia is just being formed and it is limes and Itinerarium Romanum Serbiae cultural route with Danubian museums and sites together. No other force or goal was so far even close to unite that many sites or properties into one entity. All this sites together provided materials for several exhibitions held in the gallery of Serbian Academy of Science and Arts, National Museum, Viminacium museum etc. Artifacts from these sites were sent in grand Milano exhibition in 2013 and Trier exhibitions about Constantine the Great and Christianity.

National Diamond

Factor conditions

Serbia has only 5 World Heritage properties inscribed to the World Heritage list. Only one of these is archeological site - Gamzigrad-Romuliana, Palace of Galerius (inscribed in 2007). None of these properties belongs to Danube region.

The only site that regularly holds different types of events is Viminacium, where in Archaeological Park there are multiple festivals. "Roman night" and "Danube Limes day" were organized several times since 2006. Viminacium fest (theater festival) has been organized at Viminacium amphitheater and Viminacium Limes park continuously every year since 2018.

Viminacium, Singidunum, Petrovaradin, Golubac and Ram fortress are the only sites to have Visitors centers. But Viminacium is the only site that has specific archaeological and roman cultural heritage dedicated visitors center. Other sites visitors' centers are dedicated to the mediaeval and later fortresses that they are related. It is planned during process of nomination to update them with the information and materials related to Roman Cultural Heritage.

Along the limes there are 2 national parks – Fruška gora and Iron Gate. Iron gate is also and inscribed geopark. There are multiple Roman limes sites in both of these National parks.

Viminacium Archaeological Park is the only standalone institution that is based on of performing multiple operations. Sections of the park have different roles that follow this module:

- Viminacium research and visitors center is able to hold events, house a museum, has room for exchange of researchers and is housing hi tech laboratories for archaeological research.
- Limes Park is a large camping and congress complex. It is designed in the form of legionary fortress. Main facilities are housing large restaurant with capacity of 500 persons. 2 large conference halls provide room for 250 participants each. 10 barracks provide 80 rooms with 480 beds for accommodation. This facility is capable of fully providing support to organize congresses for up to 500 persons. It was opened on the occasion of 24. Limes international congress. It is organizing summer, sport and scientific camps since 2019.
- Adventure Park and sport fields provide sport activities for summer camps and other participants or visitors.
- Reconstructed Roman Amphitheatre is put in function for public events as concerts, theater shows, sport and other events for up to 2500 persons.
- Archaeological remains are functioning since 2006 as a fully featured archaeological park with all standard services to individual, group visitors or large excursions.

Living Danube Limes

At this moment museums and visitors' centers have no impact on national or regional economy. Majority of them are financed from the national or local budgets and are not self-sustainable. Private museums are also related to major companies as they are not self-sustainable either.

National museum in Belgrade was closed in 1999 and afterwards remained partially or entirely closed for almost 19 years. Although some temporary exhibitions were opened until 2003 due to renovations museum was completely closed until reopening in 2018. This had enormous negative impact as foreign visitors could not see its collections although there was large interest. This meant that also generations of students could not see artifacts from the collections during their studies.

Roman roads in the Iron gate and the Trajan's bridge are exceptional examples of the Roman engineering. They are something not seen on other sections of the frontier. In combination with national park and unique nature it is a perfect combination to attract visitors.

Many of the sites that are in the nomination process are far from attraction that is often related to UNESCO properties. Nomination of the sites that are under the ground or water are also not precepted as something so important for the world heritage site. Perception of grandiose extraordinary buildings as regular property is bringing a lot of burden how to justify segments of the Roman frontier to non-experts looking for attractions beyond their own imagination. That is why sites like roman road and Trajan's bridge are pushed into the focus of presentation with special approach so far not used in Serbia. Under water objects capable of bringing visitor to the in-situ site under water or the verge of virtual reality hologram that is spanning instead of bridge across the Danube should at least tackle incredible imagination of people. Experience based tours around the Viminacium site are also something not normally seen in presentation of archaeological heritage in Serbia. Although still in development as it demands longer time to consume real Roman walkthrough, reliving events and food tasting feedback on this approach proved to have value for visitors.

Demand conditions

Modern visitors demand something new and unorthodox when archaeology is being presented. A simple walk through would not be something that will bring visitors on its own. Storytelling, living history, Roman food tasting, and re-enactment are something what people seek. Roman cuisine is attraction on its own. Step further is to dine as a Roman in a Roman-themed restaurants, dressed as a Roman. Many visitors, especially those from river cruisers cannot carry and normally do not buy to many souvenirs. Therefore, experience is something what is to be very useful to provide to such visitors. Disadvantage of this approach is that is demand a large workforce support, significant investment that is not applicable to many of the sites.

All numbers among visitors were in constant rise since 2015 up to the early 2020 and Covid-19 pandemic. But limited opening also changed and the structure of visitors. Without possibilities for international travel and school excursions banned in both 2020 and 2021 number of individual visitors was multiplied. Up to 2020 largest numbers of visitors arrived either through cruisers or school excursions. It is also notable that local populations are among those who are rarely seen on their own sites as visitors. It is not uncommon that friends from abroad were those to bring their friends from local to see Roman cultural heritage only few kilometres from their houses.

Context for Firm Strategy and Rivalry

Competitiveness in tourism in Serbia is very compartmented and unequally distributed. Focus of agencies and companies are fully focused on Novi Sad and Belgrade as largest cities. Only on these two locations real competitiveness is visible and present on all levels. Lack of tourist infrastructure, small capacities, especially in accommodation and restaurants is something what is discouraging

large companies. For smaller number of visitors more resources or manpower for services are needed and therefore income is disproportional comparing to Belgrade and Novi Sad. Last several years a lot of efforts are put into action to change this situation and infrastructure along the Danube is being improved but still not providing critical level to turn the tides. This is not related just for cultural heritage but is visible on all levels of tourism. Lack of international passenger terminals is also one of the reasons why many of the river cruisers have only few or no stops on the voyage through Serbia. New strategy of the Port governance agency is to open new terminals and engage more companies as well as cultural heritage institutions in this service but so far only few ports become active. Results seen at Viminacium and Golubac prove this strategy to be very successful, but it will take some time to make the crucial difference on the national level.

In Serbia there are no private museums that can hold archaeological finds. Laws also do not allow existence of any kind of private archaeological companies. Everything related to archaeological heritage strictly remains in the national public / government domain. Only private museums are related to modern art or cars.

Since Serbia is not part of the European Union it has limited cooperation with foreign museums and institutions. For the last several years situation is fast improving as the heritage and research institutions are participating in the multinational EU co-funded projects and are developing strong bilateral relations among institutions. EXARCH and other European organizations are now more and more involving Serbian institutions into the developed network of cooperation.

Serbia has no re-enactment groups related to Roman Heritage. The only existing re-enactment groups are related to the Serbian mediaeval heritage and exist only because they are strongly supported by the Serbian Orthodox Church. Viminacium Archaeological Park is organizing events such as Roman Night and has limited capabilities of re-enactment but with no permanent members and with limited equipment available.

River navigation along the Danube for last several decades was limited to small personal boats, cargo ships and international passengers' cruisers. Serbia has very few local tourists ships whose operations are limited to the areas around Tekija to Kladovo. New Danube strategy of the Republic of Serbia is placing new terminals and marinas on multiple places along the Danube that are very close or immediately next to archaeological sites. This new situation should increase visibility of Roman cultural heritage in Republic of Serbia. The very fact that passengers of ships are highly educated and influenced people it is expected that this strategy will increase all positive effects in international culture domains.

In years before the corona pandemic number of passenger cruise ships along the Danube has reached more than 2000 cruises during the year. This meant that more than 200,000 visitors had the opportunity to travel and visit archaeological sites along the Danube. Unfortunately, at that moment very few places were able to accept and dock these ships what meant that not even the small presentation potential of culture heritage was exploited. New strategy of the Republic of Serbia also involved operators of archaeological sites as operators of international Passenger terminals that are just next to them. In this way Fortress Golubački grad, Archaeological Park Viminacium, Ram fortress and Lederata got new increase of visitors and fast development in tourist promotion.

The COVID-19 pandemic had enormous negative impact on Serbian local tourist agencies. Majority of tourist agencies that exploit cultural heritage are those organizing national school excursions and summer camps.

As noted earlier two biggest museum centers are Belgrade and Novi Sad. Both are more active, better funded, and better coordinated than those on the local levels. App development is still only at its beginnings. There is an app designed for Belgrade fortress and more or less at this moment it is the only functional and used. Both museums work mostly with students rather than volunteers as it is customary in Western Europe. This is considered as students practice and regular segment of their education and way to gain some experience.

Cultural institutions are now involved into investment projects and partial competitiveness is related to commercial segment – protective excavations.

Related and Supported Industries

Entertainment industry is only partially involved into presentation of cultural heritage. Mediaeval fortresses have their traditional festivals. Viminacium Archaeological Park has also Viminacium Fest (theater festival), there were multiple concerts of different music genres over the years also. Production of traditional souvenirs is degraded, and this segment is gradually reduced. Textile industry is flourishing as caps, t-shirts, bags etc are being among the most popular souvenirs.

All museums have seasonal children's workshops. New approach represents organization of children's summer camps within Viminacium Archaeological Park.

Government

Since 2015 and forming of the original tentative list situation with sites on the frontier is gradually improving. Problems are recognized and plan to resolve issues is being defined and put into action. Development of local infrastructure is positioned as the crucial problem for any further steps. General problem of all sites along the Danube is lack of basic infrastructure. Works are planned from building new highways to local roads and walk paths.

Majority of sites lack walk paths and solid pavement roads or trails. Number of sites has a problem that there is no even access road leading to the site. Radujevac Četaće and Rtkovo Glamija sites need several kilometres of roads from the last asphalt road point. Other sites have problem that asphalt comes into the vicinity and further can be proceeded only by earth field roads. This means that sites visits depend of weather conditions (not possible to reach sites when raining because of mud roads) or types of vehicles they possess (only special vehicles can reach parts of the sites or sites themselves). Parking is general problem on almost all sites. Space available is suitable for only few personal cars and there is no space for buses.

Electricity and water are common problem on majority of sites. Most of sites do not have access to neither of these. Without bringing adequate supply lines it is very hard to provide any visitors service as building of toilets and visitors centres depend on this. It is possible to use chemical toilets or local diesel electrical power generators, but this is neither long term nor mass tourism solution.

This kind of infrastructural investments goes beyond possibilities of municipalities and must be finance by either government funding or large international cooperation co-financing. sites that are jacent to regional or higher-level roads could be covered by governmental funding and these investments are already put into the general or detailed plans. Other of this type of investments are planned to be involved into transnational or cross border cooperation or projects.

info points end info boards our plans to be deployed with the results of multiple transnational projects. Road and tourist signs our plan to be part of mutual projects that involve ministries of transportation and tourism. Info centres are planned on all larger sites that have space available on the outskirts of the archaeological remains. Is these sites are part of cultural properties where any

building is prohibited it is planned that these info centres should be settled as temporary buildings on the basis of office containers they do not require foundations or digging into the cultural heritage layers these mobile info centres could be equipped with all multimedia or promotional materials and provide full service to the visitors. On the sites that have no infrastructure these mobile info centers can be equipped with temporarily power electricity generators or electrical toilets but can also serve as a longstanding info centre where this infra structure already exists.

This info centres can also be a base for site guards in the centre of Security Service which lacks on almost all sites that are on the tentative lists so the role of this if for centres could be multiple and solve many different problems. Workers in these centres will have to be recruited from local population which should improve employment on the regional level.

1.1.7 Bulgaria

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Brief country overview (focus on the Danube)

Bulgaria is a country with ancient history and cultural heritage dating back to different periods and civilizations with still evident monuments from the Neolithic age, Thracian sanctuaries and tombs, remains of Roman cities, Byzantine and Medieval fortresses, architectural reserves, ethnographic complexes, churches, monasteries and Muslim mausoleums (Tekkes).

The region in Bulgaria, bordering the Danube River and thus presenting the Roman limes, is located on the territory of 7 NUTS 3 districts - Vidin, Montana, Vratsa, Pleven, Veliko Tarnovo, Ruse and Silistra. It is part of the Danube macro-region, and this distinctive feature determines the priority sectors for the potential of its development. The potential of the region is connected to the Danube River – a transport axis, an energy and ecological corridor as well as a place for tourism. The regional stakeholders work to meet the objectives of the EU Strategy for the Danube Region (EUSDR). It is a cross-border region with extensive exchange with Romania in all spheres. There are transnational networks of research, related to the Danube and the specifics of the region.

Huge part of the Roman Empire frontier passes along the Danube river - a natural boundary between Bulgaria and Romania. Along the entire stretch of the Danube River, the right bank is higher than the left bank, which is predominantly plain and open, often with swamps and lagoons, all this contributing to its fortification character. The Roman frontier represents a system of fortresses, roads, settlements, and auxiliary sites along the southern bank of the Danube River, which was used as additional protection, a basic communication thoroughfare and a commercial and supply road.

Among the most representative Roman sites are Bononia (town of Vidin), Augusta (village of Harlets, district of Vratsa), Ulpia Oescus (village of Gigen, district of Pleven), Nicopolis ad Istrum (village of Nikyup, district of Veliko Tarnovo), Dimum (town of Belene), Novae (town of Svishtov), Sexaginta Prista (city of Ruse), Transmariska (town of Tutrakan), Dorostorum (town of Silistra), etc.

There is a constant process of demographic aging in Bulgaria, which is characterized by a decreasing absolute number and relative share of the population under the age of 15 and an increasing share of population aged 65 and over.

The demographic structure in Bulgaria is regionally disbalanced. The regions that are located along the Danube River in the Northern part of the country have been heavily depopulated. The North-

western region in Bulgaria is on the top of the negative demographic statistics. In Vidin 29.9% of the population are people over the age of 65 and the natural growth is lower than -10%. Similar trends can be observed in the districts of Montana, Vratsa, and Pleven. A serious demographic crisis and a natural growth lower than the national average (-6.7 ‰) is typical for the north-eastern part of the Bulgarian Danube region (Ruse, Silistra)⁶⁵.

The negative demographic tendencies for Northern Bulgaria are mirrored by economic downturn in comparison to the rest of the country. Further, for regions such as those of Vidin, Montana, Vratsa, Pleven and Silistra, the unemployment rate is higher than the national average. However, the regions of Veliko Tarnovo and Ruse are leading regions in Bulgaria in terms of employment. North Bulgaria is additionally lagging in terms of infrastructure and development, which make the negative economic tendencies more acute. Those factors suppose that the locals could spend less of their disposable income on culture and heritage tourism.

However, the Danube region in Bulgaria is rich in cultural and historical, as well as ecological sites (parks, reserves, protected areas), which are conditions for the development of tourism in the region. These tourist sites can also be accessed through passenger river transport.

The education and training in Bulgaria that could be connected to the Roman cultural heritage is rather strong. There are 11 Bachelor, 10 Master and 10 PhD programmes in ancient history; 5 Bachelor, 12 Master and 8 PhD programmes in archaeology; 5 Bachelor, 12 Master and 2 PhD programmes in cultural heritage; 36 Bachelor, 6 Master and 2 PhD programmes in teaching history at schools (Консорциум "ИОО-С" [IOO-S Consortium], 2020). All those programmes create a pool of specialists that could be deployed in museums, cultural heritage institutions as well as in tourism. That substantial educational pool raises the overall general knowledge of the local citizens which is crucial for its valorization and socialisation.

However, the contemporary museology in Bulgaria faces a wide variety of challenges which mirror the huge transformations occurring in the societal, economic, public governance and ecological environments. Museums are therefore searching for adequate and innovative forms of cultural heritage interpretation. Several main trends can be outlined here: digitalization; mobilization and interaction with audiences; living history promotion; democratization and co-creation; networking and cross-sectoral cooperation. The complex process of re-thinking of the role of museum spaces is connected to the simultaneous search for innovative approaches to exhibiting.

Museum Clusters

In Bulgaria there are 182 museums in total (2020, National Statistical Institute), with a total number of 7 549 769 exhibits – stock units (movable cultural values). The personnel amounts to 3 365 persons, out of which 1 084 are professionals with a scientific title or academic degree and curators (32%). Most of the museums are local- or regional-owned. In 2019, 21 museums are state-owned, 5 have the status of “other public-owned museums” (out of 160).

The number of exhibitions peaked in 2013 with 2620 for all the museums in Bulgaria and dropped to 2189 in 2017. The number of joint exhibitions is steadily rising reaching 1033 in 2017 from only 589 in 2005. Even though the number of museums is decreasing, other curatorial output, such as educational programmes is increasing. From 2005 to 2017, the number of educational programmes increased from 95 to 144, with those for minorities surged from 12 to 29 and those for senior from

⁶⁵ National Statistical Institute, Bulgaria, 2022, available at: <https://www.nsi.bg/en/content/766/statistical-data>

34 to 78. For the same years, the scientific output has increased as well – the number of museums with at least one publication from 101 to 113 (EGMUS, 2022).

The policies and incentives for supporting the Bulgarian museums from the central government regarding international cooperation is rather limited. For 2021, there was only one programme under which relevant financing could be granted. It offered 450 000 BGN in three sections – projects for conservation, restoration, storage, and digitalization for up to 15 000 BGN; exhibitions, educational programmes and display equipment for up to 10 000 BGN and for projects connected to events and conferences maximum of 10 000 BGN (Council of Ministers, Bulgaria, 2022). Thus, most of the additional financing related to curatorial and wider museum activity is provided by the funds of the European Union.

In all the regional museums of history across the Danube region of Bulgaria (Vidin, Montana, Vratsa, Plevan, Veliko Tarnovo, Ruse, Silistra) there are exhibitions related to the Roman heritage. Historical museums with Roman artifacts are also in the cities of Lom, Oryahovo, Svishtov and Tutrakan. There are further visitor centres related to the Limes in Vidin, Belene, Svishtov, Ruse and Tutrakan. The Ethnographic Museum of the Danubian fishing and shipbuilding may accommodate a common Danubian museum cluster.

Recently, museums have started to actively cooperate on the exchange of exhibitions and best practices, creation of new cultural and tourist routes, improvement of staff qualification, etc. Museums in the Danube region in Bulgaria are collaborating closely with local and regional public administrations.

National Diamond

Factor conditions

Most of the companies in the sector of tourism in the Danube region in Bulgaria are micro, and only approximately $\frac{1}{4}$ of them are small businesses. They operate all year round, thus creating appropriate conditions for an all-season tourism destination. 3,331 accommodation facilities with more than 10 beds, including hotels, motels, camping sites, huts, etc. were functional in 2016. In the regions where the sites of the route are located, have been registered 289 accommodation locations with more than 10 beds. The volume of the accommodation capacity accounts for approximately 9% of the accommodation locations in Bulgaria. Nearly 71% of the income from overnight stays comes from Bulgarian tourists, with 29% from foreigners (National Statistical Institute, Bulgaria, 2022).

Tourist information centres are the principle starting point for most of the visitors. Part of these is included in the National network of the tourist information centres at the Ministry of Tourism and are in the municipalities of Belogradchik, Veliko Tarnovo, Vidin, Vratsa, Ivanovo, Kula, Oryahovo, Plevan and Ruse. The tourist information centres in the towns Silistra of and Tutrakan also function successfully. Close to the sites located in urban environment other types of museums, galleries, cultural institutions are set, all of which contribute not only to the complex development of tourism, but also serve as effective channel of communication to enhance information on the Roman heritage sites located nearby. Similar examples are The Eco-Museum with Aquarium at the Regional Historic Museum in the town of Ruse, the Regional History Museum of Vidin, the Visitor Centre of the natural park Persina in Belene, etc.

An element of the tourist information infrastructure, characteristic solely to Bulgaria, are the community cultural centres, unique cultural institutes in Europe. Their network is quite dense, thus archaeological and heritage sites almost constantly form a functioning relationship with the local

community cultural centre, which is exhibiting the local tangible and intangible cultural heritage of its respective region.

The Danube region has a wide variety of assets for the development of different types of tourism: cultural, historical, ecotourism, river, cruise, city, religious, adventure, alternative, rural, wine, culinary, etc. Furthermore, out of the total 10 sites in Bulgaria that are listed as UNESCO World Heritage (7 cultural and 3 natural), 2 of them are in the Danube region: the Rock-Hewn Churches of Ivanovo (Ruse) and Srebarna Nature Reserve (Silistra).

Demand conditions

Some fluctuations can be observed when it comes to the total number of museum visits in the period 2014-2019 (the last pre-pandemic year). However, the share of the foreign visitors has been steadily increasing since 2014.

Table 1: Number of museum visits 2014-2019, Bulgaria

Year of reference	Number of visits				
	Total	Of which:			
		free admissions		foreigners	
		Total	%	Total	%
2019	5354794	1026815	19,2	1240462	23,2
2018	5084387	1024552	20,2	1259607	24,8
2017	5109135	1221005	23,9	1112496	21,8
2016	5229606	1222540	23,4	1008888	19,3
2015	4763472	1246561	26,2	737642	15,5
2014	4781368	763692	16,0	792329	16,6

Source: National Statistical Institute, Bulgaria

Regarding the Danube Limes sites within the boundaries of Bulgaria, the visit rate is low, however with an upward trend. Issues such as the poor condition of the access roads, the lack of qualified personnel to offer assistance and directions/translations to tourists, the inadequate organization at the archaeological sites with a view to the tourist traffic, the insufficient knowledge of the historic context on the part of the visitors and the lack of information material are impeding further development. On the other hand, the recent dynamics and the upward trend in the development of the heritage-related events in the Danube region in Bulgaria demonstrate the demand for interactive tourism experiences, such as living history.

Context for Firm Strategy and Rivalry

Even though the number of private museums as well as the interest in setting such museums in Bulgaria is increasing, they could not offer a substantial challenge to the public ones in terms of artefacts as well as in popularity and number of visitors. The biggest private museums act mostly as collections which are usually exhibited in public museums in Bulgaria as well as around the world. Their status is still not institutionally well established and legal reforms in that respect are likely to be adopted.

The organised tourism along the Bulgarian part of the Roman limes is mainly set around the river cruise shipping along the Danube. The museums in Vidin are a leading destination along the Limes,

mainly because of the presence of the Baba Vida and Belogradchik fortresses, which are included in the river cruise programmes. Ruse, even though heavily more visited and included in such programmes, does not offer such landmarks (GFK-2016 JV, 2019). Vidin's museums for 2020 are more than 50% more visited than the ones in Ruse - 93 453 against 59 283 visitors, even though the museums in Ruse have more than 50% more artefacts (National Statistical Institute, Bulgaria, 2022).

Competition between Bulgarian companies for local customers offering tourism packages is mainly set around the price, rather than the development of the touristic product, leaving Bulgaria as a low-cost destination for both foreign and domestic visitors (Marinov, 2017). Developed museum and site visits statistics is impeding further analysis of the factors of success in respect to cultural heritage tourism.

Related and Supported Industries

The chaotic character of the general tourism market, its research and development is resulting in limited cooperation with related sectors. In terms of hospitality, the COVID-19 outbreak resulted had a serious outcome. In 2019, 3664 accommodation facilities were registered in Bulgaria. In 2020 their number decreased to 3317. The Danube region is further initially underdeveloped in that sector. The Danube Tourism Region covers 21% of the territory of the country and is inhabited by 16% of the population. It is, however, alarming that it has only 3% of the accommodation facilities and contributes to 2% of the nights spent/revenues from nights spent (National Centre for Regional Development, 2015).

Transport infrastructure and the physical access to the cultural heritage is a major issue especially in the North of Bulgaria. Digitalization of inventories and artefacts is further not set legally and institutionally. Even though such practices exist, they are sporadic and not set on a single set of established rules. However, re-enactments and gamification are being developed recently. Festivals, particularly related to the Roman cultural heritage, established as leading events in the respective local cultural calendars employ service of such reenactors. Most of these events are organized in cooperation with the local/regional museums of history, with the leading ones in the Danube region in Bulgaria being "Eagle on the Danube" in Svishtov, "Roman Market at Sexaginta Prista" in Ruse, "Nike – The Game and the Victory" In Nikyup, "Fiery Danube" in Tutrakan and "Bdin" in Vidin.

Government

The government's measures and financial instruments for supports are introduced in the strategic documents with relevance to the development of tourism. They are elaborated in the context of the current socio-economic situation and in line with the strategic orientation of the European Union regional policy and the national regional development objectives and priorities, considering the regulatory and institutional environment for its implementation, monitoring and evaluation. The system of planning and strategic documents for the development of tourism, and, in particular, of cultural and historical tourism, consists of some key documents, including:

- Strategy for Sustainable Development of Tourism in Bulgaria 2014-2030;

The Strategy aims to increase Bulgaria's competitiveness as a tourist destination and to support the sustainable development of tourism industry. It outlines a set of long-term measures in the field of planning, investment, domestic tourism, research, services, infrastructure and transport improvement, professional training and qualification of staff employed in tourism, diversification of the tourism product, restoration and maintenance of existing tourist areas and improving the look of the destination as a whole. The Strategy provides that in the period 2011-2030 tourism will become a structuring sector of Bulgarian economy (Ministry of Tourism, Bulgaria, 2014).

- Concept for Tourism Zoning of Bulgaria;

The need for tourism zoning of Bulgaria is recognized by almost all stakeholders in the tourism sector. It is motivated by the general desire to develop competitive tourism, the implementation of a zoned tourism policy, taking into account the territorial peculiarities and specifics of the different parts of the country and the implementation of effective regional marketing to make tourist areas recognizable to potential tourists and to successfully "market" them - both domestically and internationally. The document identifies 9 tourist regions, each with a specific tourist orientation, divided into basic and extended specialization (National Centre for Regional Development, 2015).

- National Development Programme: Bulgaria 2030

Bulgaria 2030 has been developed as a long-term national country development programming document where culture, cultural heritage and tourism are recognized as priorities (Council of Ministers, Bulgaria, 2020).

1.1.8 Romania

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Brief country overview (focus on the Danube)

On the Romanian territory, the lower course of the Danube, runs over 1075 km, bordering Serbia (235.5 km), Bulgaria (469.5 km), the Republic of Moldova (0.6 km) and Ukraine (53.9 km). The course of the Danube on the Romanian territory includes 12 counties (Caraş Severin, Mehedinţi, Dolj, Olt, Teleorman, Giurgiu, Călăraşi, Ialomiţa, Brăila, Galaţi, Tulcea, Constanţa) and ten municipalities. The shortest distance between the Danube River and the Romanian capital Bucharest, is made in Giurgiu county - 62 km⁶⁶.

Nearly all forms of relief in Romania mark the area along the Danube River: mountains, hills, plateaus, valleys, plains. In the west and southwest, the mountains occupy an important part of the territory, starting with Banat Mountain in Caraş Severin and Mehedinţi counties well known for karst phenomena and for a developed tourism.

The lower Danube sector begins with a spectacular and impressive gorge (Iron Gates)⁶⁷, 144 km. long, which crosses southwest part of the Southern Carpathians, with a portion of 9 km long (called boilers – Cazane), with steep and calcareous slopes. Danube Gorge at Iron Gates is one of the longest and most spectacular cross-valley in Europe and the biggest of the Carpathians. That generated unique limestone landscape; areas of bottlenecks (Coronini, Cozla, Şviniţa, Cazanele Mari and Cazanele Mici), gorges are major tourism assets. Limestone area of Cazane favoured the development of karst landform with interesting caves (Ponicova, Veterani, Fluturilor). The canyon of Danube is a spectacular landscape: steep slopes, mostly humanized sectors basins, alternating with areas of narrowing called the "clisuri". Between Drobeta Turnu Severin and Călăraşi the river widens. It is an area with numerous and beautiful lakes and non-floodable banks.

In the south part of the Danube area, the landscape includes predominantly Danube meadows, plains (Romanian Plain) and hills belonging to the Getic Plateau. Downstream from Tulcea municipality, the

⁶⁶ Ghinea D (2002), Geography encyclopedia of Romania, Enciclopedica Publishing House.

⁶⁷ The visiting strategy of Iron Gates National Park, The Iron Gates Natural Park Administration.

Danube flows into Black Sea through three major arms: Sulina, Chilia and Sfântul Gheorghe forming the Danube Delta. The arms of Chilia and Sf. Gheorghe are suitable only for fluvial transport and Sulina ensures fluvial and maritime shipping to ports of Galați and Brăila municipalities. River ports along the Danube are in number of 11.

The climate is temperate continental with very hot summers, with small amounts of precipitations and cold winters, marked by irregular intervals with strong snowstorms and frequent warming.

In counties bordering the Danube River are recorded: 11 out of 28 existing major national protected areas – National parks, Natural parks, and Biosphere Reservations (63,4% of their surface); 68 out of 273 Sites of Community Importance (SCI); 60 of the 108 Special Protection Areas for Bird (SPAs); 162 scientific reserves, natural monuments, and nature reserves⁶⁸.

In the analysed territory, there are around 8.450 historical monuments of which 6.15% of category A (group A includes national and historical monuments of universal value, according with Romanian Law on Protection of Historical Monuments no. 422/2001) and the rest of category B (group B includes historical monuments representative for the local representative heritage in accordance with the same Law 422/2001). The highest number of monuments is in Bucharest (2.628), of which 259 category A and 2.369 category B⁶⁹. The analysis of monuments by typology in the Romanian Danube area, show the division of archaeological sites:

Table 2: Categories of archaeology sites in Romanian Danube area counties

Romanian Danube area -counties-	Archaeology sites	
	Category A	Category B
Caras Severin	50	255
Mehedinti	10	153
Dolj	18	78
Olt	33	97
Teleorman	22	61
Giurgiu	5	222
Bucuresti	47	143
Calarasi	8	103
Ialomița	19	64
Brăila	-	41
Galați	37	60
Tulcea	102	364

⁶⁸ Annual reports on status of environmental factors in: Braila, Caras Severin, Calarasi, Constanta, Dolj, Galati, Giurgiu, Ialomita, Mehedinti counties.

⁶⁹ National Institute of Research and Development in Tourism (2009), Bucharest Development Strategy, Phase 1, Coord. Doru Tudorache, Grant from Ministry of Education and Research, Bucharest.

Constanța	203	279
Total	554	1.920
General total	2.474	

Source: operated data based on 422/2001 Law on Protection of Historical Monuments

It should be mentioned that, out of a total of 2,774 archaeological sites, 45 are Roman archaeological sites. In the Romanian Danube region there is no UNESCO heritage.

Romania has a territorial administrative division on 41 counties (judet) by law, the area around Danube is crossing the counties as listed in the table above, insofar the aggregated data and statistics are based on counties then at the national level; there are no specific data about the area surrounding Danube.

The total population of the region - around Danube, was approximate 7,200 million people in 2011 with the last Census of the population in Romania. The capital Bucharest is the most populated with approximate 1,900 million inhabitants representing 26,3% from the region's population. With a population between 600.000 – 800.000 inhabitants are the counties of Constanța, Dolj, Galați. On the last places, having less than 300.000 inhabitants is situated Tulcea county in the east. This is because half of the county is represented by the Danube Delta, a protected area with very few human settlements.

In 2011, there were approximate 7,000 enterprises in the region, from which 147 medium enterprises and only 23 large enterprises⁷⁰. Regarding the specific enterprises four tourism development, the trade ones and the hotels and restaurants are more important than others are. From all the counties along the Danube River, Constanta County has the highest share of hotels and restaurants but must be note the presence of the Romanian seaside, and the “hotels and restaurants” economic activity also contains the accommodation facilities. Improving the tourism infrastructure in the Romanian Danube region can be a priority for tourism development. Also, farmers are offering accommodation, agricultural products, farm visits, nature walks, handicrafts. In addition, the rural tourism is developed by exploiting ethnic – gastronomic local products (e.g., local wine).

The local entities which are involved in the conservation, promotion, and development of cultural heritage from the Romanian Danube region are: Regional Development Agencies (RDA), The Danube Bureau from Drobeta Turnu Severin municipality it is involved in the development of cultural and scientific relations with the Danube Romanian town and areas and in their promotion.

Museum Clusters

In 2020, according to the National Statistics Institute, Romania had a total of 763 registered museums / national collections, of which 97 located in the counties along the Danube⁷¹, but only a few large museums focusing on Roman and Dacian history. There are only 2 private museums (Romanian Recent Art Museum and Romanian Kitsch Museum), neither focusing on Roman/Dacian history⁷².

The current cultural museum facilities along the Romanian Danube shore, satisfy the needs of the population in a small percent, at the level of the counties the public interest towards the organized

⁷⁰ www.insse.ro Romanian National Institute of Statistics, TEMPO online database

⁷¹ https://www.culturadata.ro/wp_content/uploads/2008/10/7_Situatia_Muzeelor_din_Romania_2008.pdf

⁷² <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

culture activities becoming lower, due to the mass-media impact on everyone's time for permanent education.

According to the Romanian Clusters Associations⁷³, there are no formally organized cultural clusters, or museum cluster.

According to statistic data, by 2019 there was a total of 791 museums and public collections in Romania. At the main web site for the Romanian cultural patrimony the cartographic server drive to all historical /cultural places: <https://map.cimec.ro/Mapserver/> - here to find all museum, and sites over Romania. The archive- "Archaeological Repertory of Romania" (RAR) from the Institute of Archeology "Vasile Pârvan", only Bucharest contains 2/3 of the archaeological repertoire sheets completed between 1950 - 1956, in the archives of the institute, respectively index of places (over 2,100) and the files digitized by the Institute of Cultural Memory (cIMeC, 1997 - 2003). The archive was the basis of the county archaeological repertoires published after 1968.

Informally, museums adhere to such events as "European Night of Museums" (June 12th of every year), which is a free-access night to some of the best-known museums in Bucharest and other Romanian cities (Cluj-Napoca, Iasi, Constanta, Timisoara, Sibiu, etc.) or country-wide⁷⁴. There is also the Romanian Museums Network⁷⁵ which is made up of 76 institutional members, representing about 275 museum entities at national level, and the organizer of the European Night of Museums⁷⁶.

Moreover, museums can apply for national grants provided by the National Cultural Fund Administration (Ministry of Culture) or for international grants from donors like the European Union, Norwegian Funding Mechanism, etc. Within the frameworks of these projects, museums can form partnerships with other museums, NGOs, or academic institutions (less common with SMEs) and exhibits' mobility is encouraged.

With particular focus on the Roman/Dacian historical exhibits, the National Romanian History Museum organized and coordinated international exhibit exchanges on the topics of "Archaeological Treasures in Romania. Roman and Dacian Roots" with 838 exceptional artifacts from 39 county museums in Romania, open in Madrid until February 2022⁷⁷, following the success of the exhibit "Ancient Gold. From the Black Sea to the Atlantic Ocean" organized in Lisbon in 2017.

The museum staff mobility and continuing education is encouraged through ERASMUS+, SEE Grants and the European Solidarity Corps⁷⁸, and consists of international study tours, job shadowing and workshops on various issues pertaining to museum management⁷⁹.

The hotel market has undoubtedly been one of the hardest hits by the COVID-19 pandemic and is expected to fully recover by 2024, say Crosspoint Real Estate consultants. In Romania, the net employment rate in 2020 was 11.3% lower than in 2019.

⁷³ www.clusterro.eu

⁷⁴ <http://www.cimec.ro/Oferata-Publicatii/Muzee-colectii.html>

⁷⁵ <http://www.muze.org/sitev2/contact-us/>

⁷⁶ https://www.culturadata.ro/wp-content/uploads/2021/02/Revista-Muzeelor2020_web.pdf

⁷⁷ <http://www.cultura.ro/expozitia-tezaure-arheologice-din-romania-radacini-dacice-si-romane-succes-rasunator-spania>

⁷⁸ https://www.anpcdefp.ro/library/Rapoarte%20%C8%99i%20analize/Raport_beneficiari_externi_2018.pdf

⁷⁹ <https://www.muzeulhartilor.ro/muzeu-pe-traseu-proiect-erasmus/>

National Diamond

Factor conditions

The climate in Romania⁸⁰ is quite varied, heaving a moderate zone of the northern hemisphere but generally does not offer extreme climatic conditions. The warmest and rainiest part of the country is Banat and the coldest is Maramures. Due to the warmer temperatures the best time for traveling is from May to September. Romania is also characterized by rich underground resources (oil, coal, gas, salt) and favourable agricultural conditions. Romania has a population of 19.2 million (2020) and is a high-income country (2019) driven by its industry, energy, construction, agriculture, tourism, communications, commerce, trade, and public sectors.

Work resources quality, according to European Foundation for the Improvement of Living and Working Conditions has been conducting the European Working Conditions Surveys (EWCS) findings for Romania are Bioeconomy; Information and Communication Technology, Space and Security; Energy, environment, and climate changes. According to the World Bank⁸¹ in 2021, classified Romania as a high-income country for the first time, based on 2019 data (per capita income of \$12,610). However, the pandemic-triggered crisis pulled the country back into the upper-middle-income group. Romania's economy contracted by 3.9 percent in 2020, one of the lowest contractions in the European Union (EU) and recovered strongly at 6.5 percent in the first half of 2021. The fiscal deficit surged to 9.2 percent of GDP at the end of 2020 and will remain high in 2021.

Regarding Touristic and cultural attractions - Romania is over 238,400 km², sharing borders with Ukraine in the north, Bulgaria in the south, Serbia to the south-west and Hungary to the west. Romania also has a border along the Black Sea stretching 194 km. The country is characterized by the Carpathian Mountains, Transylvania Alps and Danube River. Romania is approximately 35% mountains, 35% hills and plateaus, and 30% plains. Romania is one of the oldest part of Europe, heaving ancient artifacts with documented sources since 5.000 BC, some of them unique in the world, example the in the second and first millennia BC, the Getae and Dacians tribes were born from cultural and ethnic intermingling in the Carpathian-Danubian region; e.g. the Hamangia culture began around 5.250/5.200 BC and lasted until around 4.550/4.500 BC – the two figurines known as "The Thinker" and "The Sitting woman" are considered masterpieces of Neolithic art. Axiopolis (Cernavoda), is the necropolis where the famous statues "The Thinker" and "The Sitting Woman" were discovered - *In the year 2000, the statuette from "Hamangia" was designated by an international commission, one of the 10 artifacts of the earthly culture that should represent our planet*⁸². *Respectively, the "Thinker" should be one of the symbols to be sent into space for a possible encounter with an extraterrestrial civilization*⁸³.

The touristic and cultural offer is intertwining is various parts of the country from Black Sea resorts to Castles and Fortresses, then Danube Delta, Medieval Towns, Carpathian Mountains, Painted Monasteries, many Medical Spas, Traditional Villages, World Heritage Sites. Meeting places as Salina Turda up to the statuary created by Brancusi in Târgu Jiu (*The Table of Silence, The Gate of the Kiss*,

⁸⁰ Romania has a territorial administrative division on 41 counties (judet) by law, the area around Danube is crossing the counties as listed in the table above, insofar the aggregated data and statistics are based on counties then at the national level; there are no specific data about the area surrounding Danube.

⁸¹ www.worldbank.org/en/country/romania/overview#1

⁸² <https://vdoc.pub/documents/encyclopedia-of-religion-3tblp776bnp0>

⁸³ The Cambridge Ancient History 3rd Edition – Part 1 The prehistory of Balkans.

and the *Endless Column*). From Prince Vlad Tepes grave, then up on Transfagarasan road at 2.544 m, also the wooden churches in Maramures, also on wild beach in Vadu or Corbu.

The landscapes, traditions, wine and gastronomic specialties and hospitality of Romanian people are recognized everywhere, the beauty of the country being found in simple things, from the Black Sea coast with numerous resorts, mountains with a network of hiking trails and ski resorts. There are about 100 touristic accredited and about 30 balneo-climatic resorts all over Romania and even the countryside has a lot of touristic villages rounding 3.000, including Prince Charles' preferred village "Viscri".

At the main web site for the Romanian cultural patrimony the cartographic server drive to all historical /cultural places: <https://map.cimec.ro/Mapserver/> - here to find all museum, and sites over Romania. The archive - "Archaeological Repertory of Romania" (RAR) from the Institute of Archeology "Vasile Pârvan", only Bucharest contains 2/3 of the archaeological repertoire sheets completed between 1950 - 1956, in the archives of the institute, respectively index of places (over 2,100) and the *files digitized* by the Institute of Cultural Memory (cIMeC, 1997 - 2003) – this is used by the IT various companies in relation to IT&C, AR or VR projects.

Demand conditions

According to a study conducted by the World Travel and Tourism Council (WTTC), it is estimated that the Romanian tourism market grew by about 7.9% annually, during 2008-2016.

Arrivals registered in the tourist reception structures in the first half of the year increased in 2019 to 52.4% compared to the same period last year, according to data from the National Institute of Statistics published today. Arrivals of foreign tourists accounted for only 6% of the total. The occupancy rate is still low: The index of net use of tourist accommodation between January 1 and June 30 was 19.2%. The overnight stays registered in the tourist reception structures in the first six months of the year amounted to 65566000, increasing by 53.2% compared to those from January 1 to June 30, 2020. Out of the total number of overnight stays, the overnight stays of Romanian tourists in the structures of tourist reception with accommodation functions accounted for 93.2%. Regarding the overnight stays of foreign tourists in the tourist reception structures, the largest share was held by those arriving from Europe (81.4% of the total foreign tourists)⁸⁴.

The analysis and evaluation of the main statistical indicators in Romanian tourism shows tourist accommodation - the main component of the technical material base - represents a strong support for the tourist activity in our country, both by the important number of places and by their structure. After 1995, the number of tourist accommodation structures registered a continuous increase, from 2965 - in 1995 to 4694 in 2007. In 2007, the accommodation structures were divided as follows: 1081 hotels and motels, 6 inns, 104 chalets, 62 campsites, 708 villas, 115 school camps, 736 urban tourist pensions, 3 holiday villages, 9 accommodation spaces on ships and 1292 agrotourism pensions. The number of rural tourists boarding houses has increased the most. If in 1995 there were 61 such units, in 2007 their number reached 1292.

In terms of revenues, in the period 2000-2004, they were about 400 million euros. The revenues of the local tourism industry registered in 2008-2009 an increase of up to 30%, a rate like that recorded in the neighbouring member states of the European Union, the increase being due to the development of business tourism. At the same time, market analysts estimate that, for four-star hotels in Bucharest, an average occupancy rate of between 60% and 70% is forecast for the period 2008-2011, a level like

⁸⁴ Source: I.N.S.S.E, *Statistical Brief*.

that currently recorded. The highest interest in searches to travel to Romania in the last month comes from Germany, followed by Italy, Great Britain.

Context for Firm Strategy and Rivalry

The tourism market is very dynamic, but the museum and sites are part of the national patrimonium system and are not private.

The online tourism market in Romania has exploded recently, with travel agencies starting to explore the virtual space for presenting offers. In addition to their own sites, they promote their offers with the help of portals specialized in promoting tourism offers, so that those who are looking for a vacation can benefit from a rich and varied beach of tourist packages. Online tourism has recently acquired a high importance, tourists being able to have the desired reservation, confirmed and guaranteed after only a few clicks, thus achieving a substantial time saving in terms of total guarantee. The database with tourist offers from most travel agencies in Romania through the website www.infoturism.ro and the most varied collection of accommodation units, tourist objectives and traditional holidays in the country through the website www.infopensiuni.ro. The [infoturism.ro](http://www.infoturism.ro) portal is already a name on the online tourism market, with over 100,000 holiday offers from the almost 400-member travel agencies and benefits from a state-of-the-art technological and graphic platform, being the most visited tourism portal in the last 11 years, being accessed monthly by an average of over 500,000 visitors interested in vacation planning.

The Covid-19 crisis has had a strong impact on tourism, but the latest study by the Szallas Group, which includes the online hotel platform Travelminit.ro, and Nielsen IQ point out that the pandemic has further stimulated tourists' desire for vacation. The pandemic has encouraged tourists to turn to guest houses and cottages as a trend in tourism for years to come, thus increasing investment in Glamping and Bungalow destinations. As expected during pandemic time, smaller accommodation units, such as guest houses, cottages, and apartments, which can provide tourists with the privacy and security they need, are increasingly sought after by Romanians. Cottages and guesthouses in hidden destinations, less crowded, became much more popular during the Covid period, being the perfect solution for those who want to enjoy a relaxed vacation in a secluded place, as far away from the crowds.

In Romania, the share of hotels decreased from 26% in 2019 to 24% in 2020, while the share of non-hotel bookings increased from 20% to 24%. The non-hotel segment includes apartments, villas, and summer houses. In 2022, the completion of 940 accommodation units on the local market is estimated, according to IBC Focus, a company that monitors construction sites nationwide. These are projects identified in the last 6 months, in the authorization stages, before execution, construction and arrangement. Cumulatively, they occupy an area of 3.61 million square meters and involve an estimated investment of 7.38 billion lei, according to data published on its own platform, HotellInvest.ro.

Despite the challenges in the hotel market, new hotels have opened in Bucharest, such as Moxy Old Town (July 2020) and Holiday Inn Bucharest Times (January 2021). In addition, the project under construction, such as the Autograph Collection in the old town or the expansion of the rooms and the renovation of the Radisson Blu hotel complex, are scheduled to open in 2021 and 2023, respectively. At the capital level, 53% of respondents expect the hotel market to recover in 2023. This is in line with Oxford Economics forecasts of an acceleration and full return of tourism in Bucharest by 2023, according to a study.

In Romania, the volume of transactions with hotel assets reached in 2020 approximately 9.5 million euros, decreasing by 87% compared to the volume of almost 75 million euros from the previous year.

Related and Supported Industries

Success in the tourism industry depends largely on the strengths and weaknesses of other companies in that industry. In this industry we find both the destination offers, as well as the system of visiting centres and the organization of museums and historical sites, very well equipped. Then there is the infrastructure of travel agencies and other companies that have cultural and sports activities with leisure offers, a very advanced communications infrastructure, a developed transport infrastructure, an industry of personalization services and forms of tourism promotion and marketing. The presence of related and support industries at national level as follows: agriculture oriented in proportion of 60% towards the organic field, agriculture, family farms; developed support industries - textiles, etc.

Other related industries that participate collaterally in the development of tourism: construction industry, wood and furniture industry, ceramics, and glass, etc. and their collaboration in the market helps to stimulate innovation. Thus, investments in innovation in the tourism sector bring a high level of added value by stimulating other sectors, such as the cultural and creative industries, the agri-food sector, construction, etc.

There are also some other determinant factors, as the IT policies and the related very good work force, well developed. Level of Education on mobile and Internet technology is high and Romania has a wide geographical IT advantage; high-performance IT network that provides high-performance geographic coverage nationwide. There are already plenty of various live Apps and IoT in place, as useful information tools and the development is on verge in this regard.

Tourism occupies an important place in related investments in the conservation, protection, promotion, and development of the natural and cultural heritage itself is important for a business to grow, innovate, add more value to customers and become more globally competitive.

According to Porter, the success of an industry depends on the success of related industries and their support, because internationally competitive suppliers can provide cost-effective access to inputs.

Government

Local authorities have an important role in the process of cultural and tourism development at local level, in promoting the Danube culture, by getting involved in the creation of the specific infrastructure, in setting up some cultural programs, creating local brands or attracting the interested factors into the creation of some cultural development associations.

Romania has developed a Master Plan for the national tourism of Romania for the period 2007-2026 necessary for the development of tourism in Romania. In the first part of this project, an analysis is made of all the existing resources, of the equipment, of the infrastructure, of the main tourist indicators.

There is a very well-organized legislative framework in the field of tourism, this includes: LAW no. 275 of November 23, 2018, on the approval of GovO no. 15/2017 for the amendment and completion of the GovO no. 58/1998 regarding the organization and development of the tourism activity in Romania; and LAW no. 170 of October 7, 2016, regarding the tax specific to certain activities. Gov.O 8/2009, regarding the granting of holiday vouchers; GD 215/2009, for the approval of the Methodological Norms regarding the granting of holiday vouchers; Gov.O 63/1997, regarding the establishment of facilities for the development of rural tourism; GovO 58/1998, regarding the organization and development of the tourism activity in Romania. Services as access to castles,

museums, memorial houses, historical monuments, architectural and archaeological monuments, and others, are recognized as revenue based on tickets sold and are charged by local authorities at the county level, for private operators, being 5%.

The provision of cultural services carried out by public institutions and heritage cultural bodies, recognized as such by the Ministry of Culture, are exempt from taxes. Certain categories of people have partial or total discounts on ticket payments, e.g., schoolchildren, students, pensioners, etc.

The industry has been able to stay above a fragile waterline due to government support schemes. A special feature of the region and Romania is the support provided by the state to support domestic tourism, which, especially in the last two years, amid the uncertainty of international travel, has enjoyed an exponential growth in Romania. This increase was also stimulated by the option of paying with holiday vouchers, introduced by the Romanian government since 2017. Millions of employees benefited from this financial incentive, which gave them the opportunity to book superior accommodation units, hotels, or premium pensions, paying a smaller difference to have access to superior services.

1.1.9 Moldova

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Brief country overview (focus on the Danube)

The Republic of Moldova occupies a territory of 33.846 km² with a population of 2.998.235 people (census from 2014). Located in Eastern Europe, Moldova is a country with a rich but poorly known tourist potential. Bordered by Romania to the West and Ukraine to the North, south and east. It is a landlocked country, with the Black Sea potentially accessible through a strip of the Danube at the southern end. The total length of the borders is 1,389 km. The current relief of the Republic of Moldova is fragmented, represented by a succession of plateaus and relatively low plains. The longest rivers are Nistru, Prut, Răut, Bâc, Botna, Ichel, Cogâlnic and Ialpug. The natural lakes are not numerous, most of them being located in the meadows of the Prut and Nistru rivers.

The Republic of Moldova is located in the area of temperate-continental climate, influenced by the proximity of the Black Sea and the interference of warm-humid air in the Mediterranean area, with insufficient humidity, which causes a high frequency of droughts. Winters are mild and summers are warm. It is important to note that the operating schedule of some tourist attractions of interest may change depending on the season.

The rich soil and temperate continental climate with warm summers and mild winters have made the country one of the most productive agricultural regions since ancient times, and a major supplier of agricultural products in South-East Europe. Moldova's fertile soil produces fruits, vegetables, and cereals, while one of the country's most important industries is the wine industry, for which the Republic of Moldova is known far beyond its borders. For many years, wine production in Moldova has been the main occupation of the population.

Lately, the country also exports wiring, equipment and electronic tools for cars. With a GDP per capita of \$ 13,878 per year (2021), Moldova imports oil, coal and natural gas, mainly from Russia. The

construction of the Giurgiulesti Port increased Moldova's access to the international oil market and reduced its energy dependence on Russia (construction finalized in 2016).

Due to the low and unpromising economy, a large part of the population was forced to go abroad in search of new financial sources starting with 2000. Currently, more than half a million of the able-bodied population work abroad. The money transferred to the country by this part of the population is the most important source of GDP (about \$ 1 billion legally and officially registered).

According to the "Generations and Gender" Study, order by the Ministry of Labor and Social Protection and realized at the end of 2021, Moldova's population is expected to continue to decline by an average of 0.6% to 1.6% annually by 2035.

Along with external migration, the Republic of Moldova is facing internal migration pressures, as people migrate from rural areas to the capital and urban areas. 88% percent of all domestic migrants are between the ages of 20 and 49. During 2019, the urban population increased by 8,100, with the migration of people from rural areas.

According to the data of the National Bureau of Statistics of the Republic of Moldova, between 2014 and 2019, no children were born in 58 localities. The data show that almost 350 villages are absorbed by the communes they belong to. The actual number of deserted villages is unknown, as the last census took place in 2014.

Throughout history, the territory of Moldova (between 1812-1918 with the name of Bessarabia, a province of the Russian Tsarist Empire) has been a bridge from the Eastern border of Europe to the Western border and the Balkans. After the Russian-Turkish War of 1812, the Christian population of Turkish origin in Romanian Dobrogea and Zaporozhye (Ukraine) have settled in Bessarabia, so that today, in southern Moldova, in the Bugeac steppe there is the region called Gagauzia (Gagauz Yeri with center in the town of Comrat). After the Second World War, Moldova was incorporated into the Soviet Union (1944-1991). On August 27th, 1991, Republic of Moldova has declared its independence.

Moldova is a diverse and multi-ethnic country. Although over three quarters of the population are Moldovans, the country also hosts Romanians (7% of the population, based on self-identification), Ukrainians (6.6%), Gagauz (4.6%), Russians (4.1%), Bulgarians (1.9%), Roma (0.3%) and other ethno-linguistic groups (0.5%). In addition, in Moldova live Belarusians, Poles, Armenians and Jews, and other ethnic and religious minorities (according to the census from 2014).

The official language of the Moldova is Romanian. Russian is currently the second most widespread language in Moldova. It has been offered the status of "language of interethnic communication" (along with the official language). Ukrainian, Gagauz and Bulgarian are spoken to a lesser extent. Due to the large number of Gagauz and Ukrainian speakers, these languages have been given official status in Gagauzia and Transnistria, respectively.

After gaining the independence, the Republic of Moldova kept the beautiful holidays and traditions, delighting in the delicious and most importantly ecological national cuisine, as well as in the Moldovan customs and culture. Although it has a small area, the Republic of Moldova has a considerable tourist potential, represented, first of all, by the geomorphological aspect of the territory - an unusual diversity of landscape reserves or natural landscapes and geological monuments of European and world value. The priority forms of tourism practiced in the last decade in the Republic of Moldova are rural, wine, cultural, health and beauty tourism.

Living Danube Limes

To date, museums are not included in the school curriculum, but they organize and carry out various educational activities for research, entertainment and promotion of museum heritage involving children, pupils, students, teachers and parents.

Thus, examples of good practice regarding the educational role of the museum can be identified in activities to raise awareness of the public of all ages such as International Children's Day, International Museum Day, European Museum Night, International Family Day, etc. in collaboration with educational institutions, governmental and non-governmental organizations, community institutions focused on education, etc.

The State University of Moldova, Faculty of History and Philosophy is the only higher education preparing museography specialists with the specialization Cultural heritage management and Philosophy, anthropology, and cultural management.

Museum Clusters

Currently, 130 museums are registered in Moldova. There are 7 museum institutions with 14 branches subordinated to the Ministry of Education, Culture and Research: National Museum of Art of Moldova, National Museum of History of Moldova (6 branches), National Museum of Ethnography and Natural History (4 branches), National Museum of Literature „Mihail Kogălniceanu” (3 branches), House-museum „A.S. Pushkin” (1 branch), Cultural-Natural Reservation ”Orheiul Vechi ”, Museum of Jewish History of the Republic of Moldova.

103 museum institutions are managed by LPAs, 4 are privately owned, 12 are managed by public associations. The total museums' collections amount to 1'041'843 pieces of cultural heritage that represent the national and universal culture. A large part of the heritage pieces is managed by national museums (526,055 thousand pieces). Museums of national importance are located in buildings with the status of historical monuments.

The regional museums are subordinated to the local public authorities (communal, village and district) in Republic of Moldova. Out of the total number of museums, 40 are located in urban areas and 90 in rural areas. The Ministry of Education, Culture and Research has a mandate to monitor the activity of publicly owned museums and to ensure the annual budget of national museums. Local public authorities provide the annual budget for local museums. Most of museums are located in the capital.

The permanent museum exhibitions depend on museum's profile and consist of: archaeological pieces, documents, photos, numismatic pieces, old books, periodicals, ethnographic pieces, items of inventory and personal use, decorative art, plastic art (painting, graphics, sculpture), pieces of furniture, weapons and armour, technical objects, philately, intangible assets (natural reservations)

Only two Moldavian museums have Roman heritage exhibitions. This is due to the fact that the archaeological findings are regularly kept at the National Museum of History of Moldova, having better conditions for keeping and restoration (if needed).

Several national museums have joined the public association National Committee ICOM Moldova, which is a non-governmental organization, legal entity registered in Moldova in 2010 and is member of the worldwide network of 118 National Committees of the International Council of Museum, which promotes cultural values preservation of the cultural heritage. The legal mandate of ICOM Moldova implies development of national policy for heritage, capacity building of the heritage sector stakeholders for a sustainable cultural and economic development, promotion of the regional co-

operation and exchange of experience within the Eastern Partnership region and between the EU countries.

ICOM Moldova activities are focused on: professional cross-cultural cooperation & exchange of experience; dissemination of knowledge and raising public awareness on cultural issues; capacity building of cultural workers/constituents; mainstreaming the professional standards, including the ethical issues, preservation of heritage and combating the illicit traffic in cultural property etc.

National and regional museums are actively involved in organizing international and local events. Under the auspices of Ministry of Education and Research there are organized: National Day of Culture; Memory Week; Monuments and Sites Day, International Museum Day and European Museum Night; National Day of Traditional costume; European Heritage Days; The National Carpet Fair, etc.

In the last decade, with the initiation of museum education programs, the association with the international projects European Museum Night and European Heritage Days, the museums in the republic have become more attractive.

The tools for promoting museums according to the annual reports are permanent exhibitions and temporary exhibitions, cultural-educational activities, editing of collection catalogues. At the same time, museums do not have funds for marketing and promotion, and lack specialists in the field of promotion strategies and communication with the public.

National Diamond

Factor conditions

To date, more than 15,000 monuments of history and culture have been identified in the Republic of Moldova. Of these, 5,206. Most of the monuments of national importance can be found in Chisinau municipality (419). Some monuments are assigned to two or three categories: history / art, history / art / architecture, of which 989 are related to the theme of World War II. Part of the cultural and natural heritage of the Republic of Moldova are: fortresses, monasteries, churches, landscapes and natural sites etc. In 2005, the geodetic meridian near Rudi village, Soroca district, was included in the World Heritage List (managed since 1978 by UNESCO).

The priority forms of tourism practiced in the last decade in the Republic of Moldova are rural, wine, cultural, health and beauty tourism.

Rural tourism is practiced in picturesque villages and can provide different services to tourists who want to spend time at nature, being familiarized with local folklore, entertainment and traditions, familiarization with the crafts practiced in the given locality.

Moldavian vineyards are also an important tourist attraction in the rural sector. There are currently 142 wineries in the country, of which 23 have conditions and experience in receiving visitors. Many of the wines produced in Moldova have a good reputation internationally. Tourists can visit within the "Wine Route" cellars and underground cities, wine cellars, enterprises of primary wine processing, production of champagne, divine, heresy, balms, etc.

Republic of Moldova has a rich cultural heritage. The earliest monuments are the Geto-Dacian settlements and the Roman fortifications. A variety of attractions for tourists offer the remains of medieval fortifications, various archaeological complexes.

The spas in the Republic of Moldova could become a substantial spa product of international level, provided that an adequate infrastructure is created around them.

Demand conditions

With the development of hospitality tourism, the share of foreign tourists staying in accommodation units in the Republic of Moldova has also increased. If, at the end of 2010, 26.1% of foreign tourists were accommodated in the total number of tourists accommodation units in the country, then, in 2018, their number reached the share of 43.0%, meaning an increase of 16.9 %.

Most foreign tourists staying in the Republic of Moldova came from Romania, Ukraine, the Russian Federation, the USA, Germany, Italy, Turkey, Great Britain, Poland and France. This ranking remains stable, with a few exceptions. It is important to mention that around 130000 tourists are visiting Moldova not organized but plan their own vacation. They stay in hotels, eat in restaurants, but they do not use the services of travel agencies.

Besides, the mentioned above types of tourism, visitors are also interested in cultural events, such as: Music concerts, festivals, marathons, join the most diverse events. International ethnos Jazz Festival - Ethno Jazz, DescOpera Festival, Underland Fest, Color Festival, as well as marathons organized in underground wine galleries are most searched by tourists.

Most visited touristic places in Moldova are the wine tours, followed by the reservation “Orheiul Vechi”, Saharna, Tipova, fortresses. Museums are not on the top list of the foreign tourists, but neither of natives.

According to a sociological poll, ordered by the Ministry of Education and Research it is revealed the fact that most of respondents are not interested to visit museums (21,3%), whether they enter the museum occasionally without being interested in museums or events (40.6%). Only 38% of respondents say that they visit museums and are informed about museum events.

Table 3: Number of museums, museum visitors and inventory pieces 2011-2020, Moldova

Museum s in Republic of Moldova	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Museum s/ total	108	109	116	119	123	123	126	127	127	130
Visitors	957217	828690	821319	880044	990357	836218	757826	759519	794104	300695
Number of pieces	1041843	1067010	1086903	1120868	1150988	1168495	1411093	1442449	1500695	1527308

Source: National Bureau of Statistic, Moldova (National Bureau of Statistics of the Republic of Moldova, 2022)

Context for Firm Strategy and Rivalry

Tourism in the Republic of Moldova is considered to be as one of the primary fields of the national economy.

The foreign tourists stay in the Republic of Moldova on average 2-3 days, explained by the nature of business and service trips or short vacation trips. The travel agencies have elaborated a system of 20 national tourist routes, 7 of which are part of a national program "The Road of Wine".

At the level of the national economy around 13.56 thousand or 3.67% of the employees are in the hospitality field (HoReCa), from this category only every tenth employee (10.66%) is from the hotel, the others being employed by restaurants, cafes and other catering units.

The trends of socio-economic evolution of the regions outside Chisinau city highlight the perpetuation of noticeable inter-regional discrepancies in the country's development, including tourism. Specifically, there are two regions with performances above the national average (UTA Gagauzia Development Region and Central Development Region) and 2 other regions with performances below the national average (North Development Region and South Development Region).

Moldovan national museums generally have a website. Some of them are quite well structured and provide information in English as well. Regional and local museums regularly use social networks. Most of them have created Facebook pages. In some respects, the collections are better communicated on the websites than by the communication devices present on the site / museum. It should be noted that many museums do not have translations of legends in an international language and, in general, there are no panels in the rooms to classify objects and goods in the context of the reference.

In some cases, there are videos (museum of history and archaeology), but they are exclusively in Romanian. Detecting the location of a museum in Moldova is not easy, in the absence of indicators. Only in Chisinau, there are installed indicators guiding visitors to the six national museums.

Most visited museums remain to be the ones from Chisinau (capital of Moldova) due to the city's development, entertaining facilities and better arrangement and promotion. Museums from Chisinau are located in buildings with historical value and there are organized regular events, besides their daily destination.

Related and Supported Industries

Total revenues from tourism (hospitality, domestic and foreign) in Moldova have doubled in absolute value in the last 6 years, increasing by over 17% annually. At the same time, the total number of foreign tourists visiting Moldova through travel agencies and tour operators in 2018, before the COVID-19 pandemic increased by 46% compared to 2013.

In addition to the temporary exhibitions hosted by museums, there are also organized a series of cultural activities in cooperation with cultural and educational institutions. Many museums carry out creative workshops, cultivating the taste for beauty and art, the activities are mostly dedicated to children. Besides the creative workshops and exhibitions, museums also attract the public through musical evenings, promoting especially classical music in cooperation with national concert halls. A new approach of cooperation was established during the pandemic of COVID-19 of museums with scientific and educational institutions for the joint promotion of the cultural heritage of the Republic of Moldova. In this sense, there were organized joint online events: memorial exhibitions, discussions, meetings, attended by important artists and cultural researchers.

There became a tradition to organize classical music concerts, initiated by the artists of the National Philharmonic in the Cultural-Natural Reservation "Orheiul Vechi".

As for the cooperation between museums and touristic agencies / operators it is almost non-existent. Only few touristic agencies promote and include visits to museums, being part of a larger excursion with other touristic destinations in the same package. The searches revealed the inclusion of only 2 museums in the touristic itineraries.

Tourist attractions located in localities (monasteries, churches, museum complexes, parks) benefit from local access roads, relatively maintained throughout the year. It is difficult to reach museums using the widespread public transport network, as there is no map of transport neither in the capital

Chisinau or of the railway or regional public transport network. The online system is not an easy service for tourists and short-term visitors. Museums, especially local ones, are generally well placed in the territory and carry out activities for school groups and the general public. However, they are not very integrated with the other realities present in the territory.

Government

The museums of Republic of Moldova remain still the most accessible cultural institutions capable to transmit cultural values through the collections they hold, and they have a big potential to be the active participants in the formation of the spiritual values of the human being and society. During the last years the cultural policy became one of the priorities for the development of the Republic of Moldova.

The concept of state policies in the field of museums stipulates that public administration authorities guarantee the provision of favourable conditions for museum activities (building maintenance, security, technical equipment, purchase, conservation, and restoration of pieces museums, conducting research and capitalization of museum heritage).

Development of museums currently is mostly done by means of international projects and external support (renovation of buildings, creation of partnerships, digitalization, unified automated record system and use of data on pieces of mobile cultural heritage, etc). As for the creation of Touristic Information Centres, all of them have been created within external funded programs.

At the country level, the Tourism Development Strategy - Tourism 2020 is currently being implemented. At the same time, a new Strategy – Tourism 2025 has been elaborated and will enter into force. Currently, the following priorities are outlined in the field of tourism: improving access to tourist attractions by arranging tourist destinations and infrastructure, renovating cultural heritage objectives, increasing access to information on offers and tourist potential in the Republic of Moldova, facilitating access to start and conduct business, including through financial assistance programs, increased international collaboration, but also changes in the normative framework. According to the new policy, the cultural sector will become a viable area that will have a great impact on the economy and social life of the country. According to the strategy, the heritage and museum sector should review the management system and to introduce a new management based on contemporary market relations and project activity. The Ministry of Culture has a mandate to monitor the work of museums that are in public ownership.

1.2 Danube Region's Analysis

Desislava Mincheva-Yordanova and Veselin Vasilev (NTC BG Guide)

The Danube Region has become a hotspot for cultural and heritage tourism, with numerous museum clusters providing a unique opportunity to explore the region's history and culture. The region's competitiveness in the field of museum clusters is based largely on its diversity of offerings and the strong presence of museums with a global reach. The Danube Region is home to many of the world's most renowned museums, including the Kunsthistorisches Museum in Vienna (Austria), the National Museum of Natural History in Budapest (Hungary), and the Ethnographic Museum in Bratislava (Slovakia). These and other world-class museums provide a wealth of educational and cultural experiences to visitors from around the world. The region is also home to numerous smaller museums, such as some museums in Bulgaria and Romania. These smaller-scale museums provide a unique opportunity to explore the local's rich heritage, as well as its more recent history.

Overall, the Danube Region's competitiveness is based on its diversity of offerings and the presence of museums with a global reach. This ensures that visitors from around the world can explore the region's history, culture, art, and technology in an engaging and educational way.

After revealing the national diamonds of the Living Danube Limes partner countries along the Danube, the context for rivalry and competition, the role of the governments, etc., the general image of the Danube Region shall be further analysed.

1.2.1 Museum Cluster Diamond

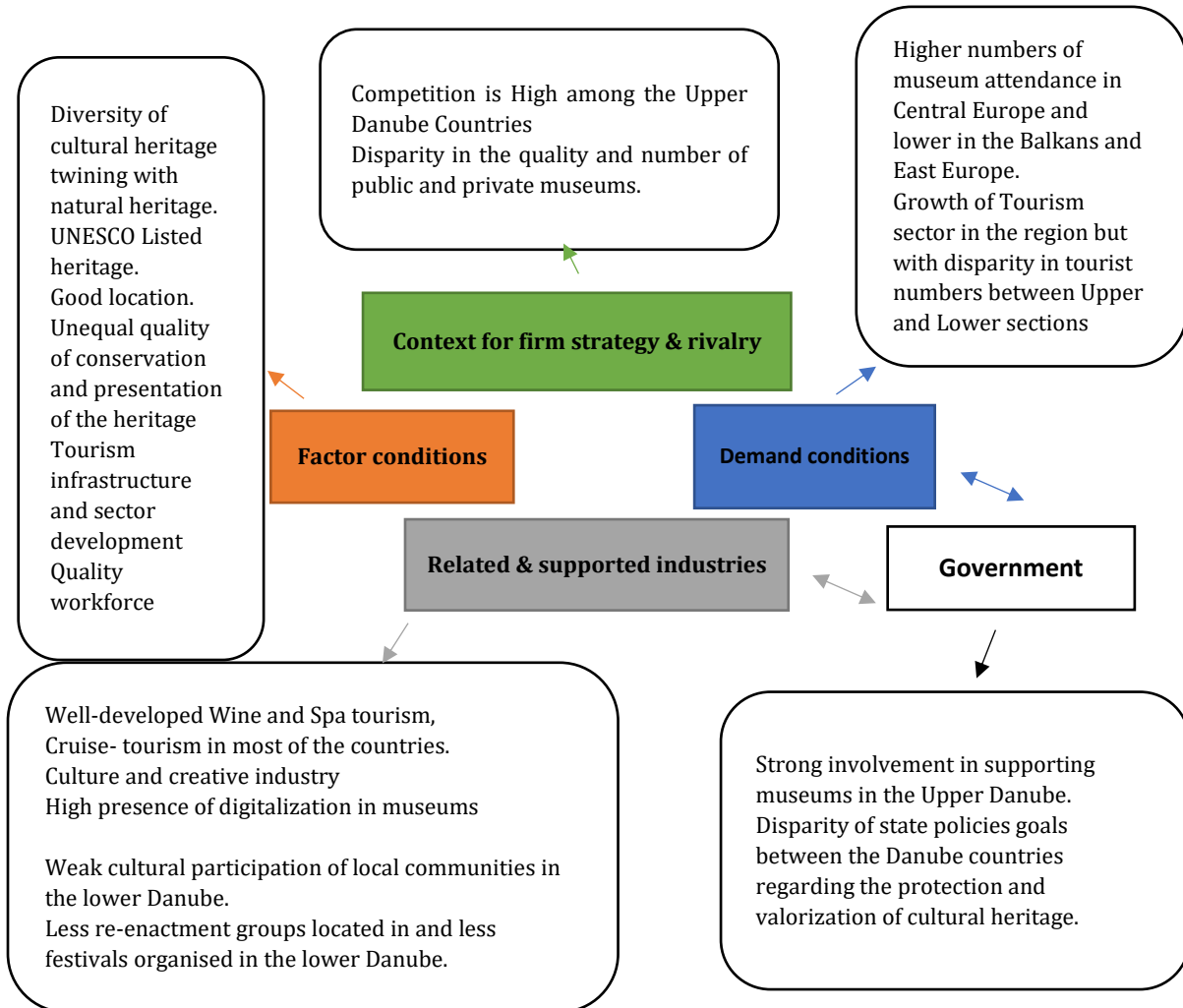
A successful museum cluster diamond is characterized by strong collaboration, a high level of innovation, complementary resources and services, and a supportive environment. Such a cluster is often associated with cities or regions with a high concentration of museums and can create competitive advantages for the region. The (Living) Danube Limes Museum Cluster, being concentrated on the Danube Region, can create further competitive advantages for the whole Danube region.

For the purposes of the current Strategy, the Danube Limes Museum Cluster Diamond is based on the concept of Michael Porter's "Cluster Diamond" model. This model involves the four key components of a successful cluster: demand conditions, related and supporting industries, factor conditions, and firm strategy, structure, and rivalry. The model also includes a fifth component, which is the presence of a competitive advantage that can be leveraged by the cluster.

For the creation of the Danube Limes Museum Cluster Diamond, National Tourism Cluster "Bulgarian Guide" had identified several partner museums located in countries along the Danube River. These partner museums are located in Austria, Germany, Hungary, Slovakia, Croatia, Serbia, Bulgaria, Romania, Moldova. The museums are linked by the Danube Limes, and they offer a variety of exhibits and activities related to the history and culture of the region. The cluster diamond also includes a number of related and supporting industries, such as tourism and hospitality, that help to promote

and sustain the cluster. Additionally, the cluster diamond includes several factor conditions, such as a highly skilled workforce, a diverse cultural heritage, and a favorable business climate. Finally, the cluster diamond includes a number of firm strategies, structures, and rivalries that help to promote the success of the cluster.

Figure 2: (Living) Danube Limes Museum Cluster Diamond



Source: NTC BG Guide analysis

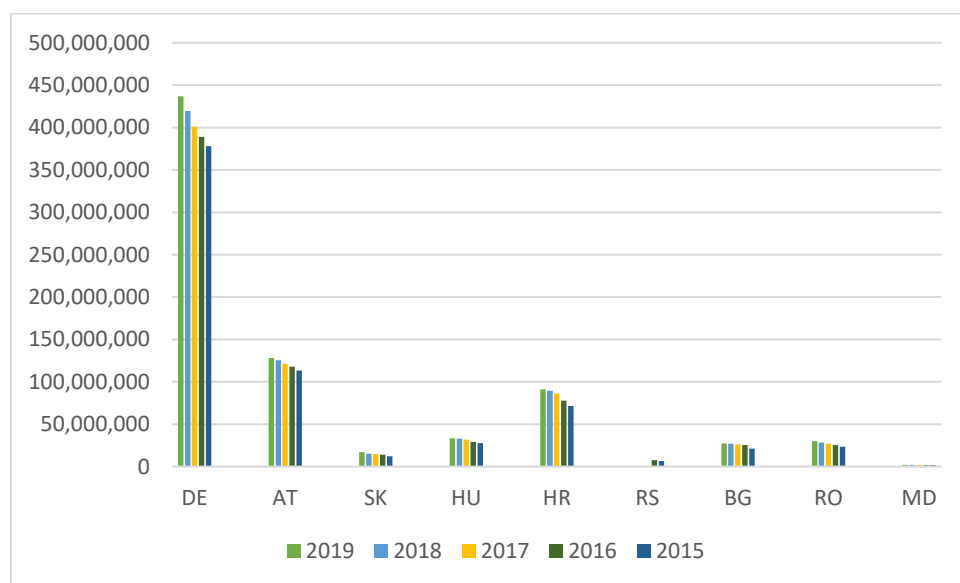
1.2.1.1 Factor conditions

The external factors or the factor conditions for the development of a Museum Cluster along the Roman Danube Limes represent mostly the externalities that would be beneficial, or on the contrary – impeding, its development. Those could be the economic environment, the initial resources present and the ability to initiate the creation of a museums or a museum cluster (Boja, 2011). In the analysis

on the country level presented above, two of those factors were put to the fore – the existence of a resource, which would be the cultural heritage in its various forms, and the existence of a developed touristic sector that could facilitate more museum visits.

Across the examined countries, these factors are evident at a varying level. In terms of tourism, Austria and Germany have strong tradition in tourism, Hungary and Bulgaria are developing those industries steadily since the fall of the Iron Curtain, and the tourism industry in Croatia is expanding since the 2000s, while Serbia, Romania and Moldova being in the end of the line in terms of such developments. The existence of cultural heritage sites, artefacts or traditions does not quite correlate with the development of tourism. For example, in terms of UNESCO World Heritage historical sites, Romania and Hungary the same number of listed objects, however, the tourism industry in Romania is far behind that of Hungary. It should be noted that the tourism sector is advancing across all of the listed states with higher growth rates at the countries which were initially trailing behind. (EUROSTAT, 2022) (National Bureau of Statistics of the Republic of Moldova, 2022).

Figure 3: Nights spent at a tourist accommodation



Source: EUROSTAT, National Bureau of Statistics of the Republic of Moldova

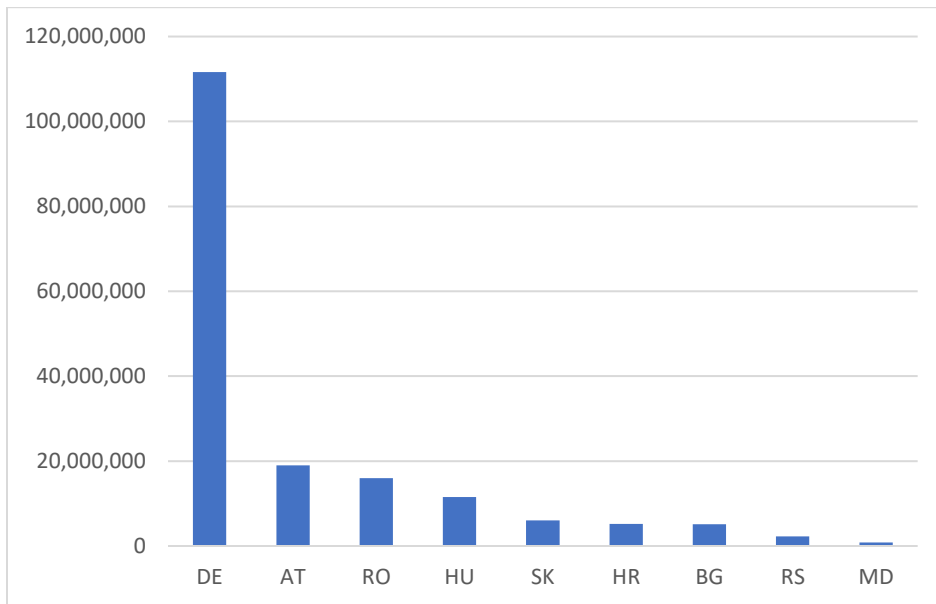
Graphic: D.Mincheva-Yordanova, NTC BG Guide

1.2.1.2 Demand conditions

The demand in terms of cultural heritage tourism, the development of museums and curatorial activity is ever-growing. Lowenthal describes that demand as an unleashed “heritage craze” (Lowenthal, 1998). However, as presented above, there are factors limiting the demand of museum visits – in Romania this is the new media and in Moldova, it is the lack of financing and the lack of proper modern socialization of heritage. Further, there is a clear trend of lower demand – museum visits – when moving from West to East, with higher numbers of museum attendance in Central Europe and lower in the Balkans and East Europe (S. Table 5.). There are two exceptions – the highest

number of visits, compared to the size of the country, is in Austria, due to its developed tourism, and the low number in a relatively Western state - Serbia, which could be explained by a lower number of tourists and lower general cultural participation of the population. The general cultural participation could also explain the higher number of free visits which are provided in Serbia and the Eastern part of the sampled countries as it is sought as a tool to ensure higher attendance (EGMUS, 2022) (National Bureau of Statistics of the Republic of Moldova, 2022) (Museum Documentation Center - Croatia, 2020). The demand factors of the Museum Cluster should also take into account the artificial limitations to the attendance such as those that were due to the COVID-19 related lockdowns. In such cases, digitalisation of the archaeological sites and the museum artefacts is crucial to sustain the demand (Zuanni, 2022).

Figure 4: Number of museum visits, total/free attendance, 2015-2019



Source: EGMUS, Croatian Bureau of Statistics, National Bureau of Statistics of the Republic of Moldova, Museum Documentation Center – Croatia

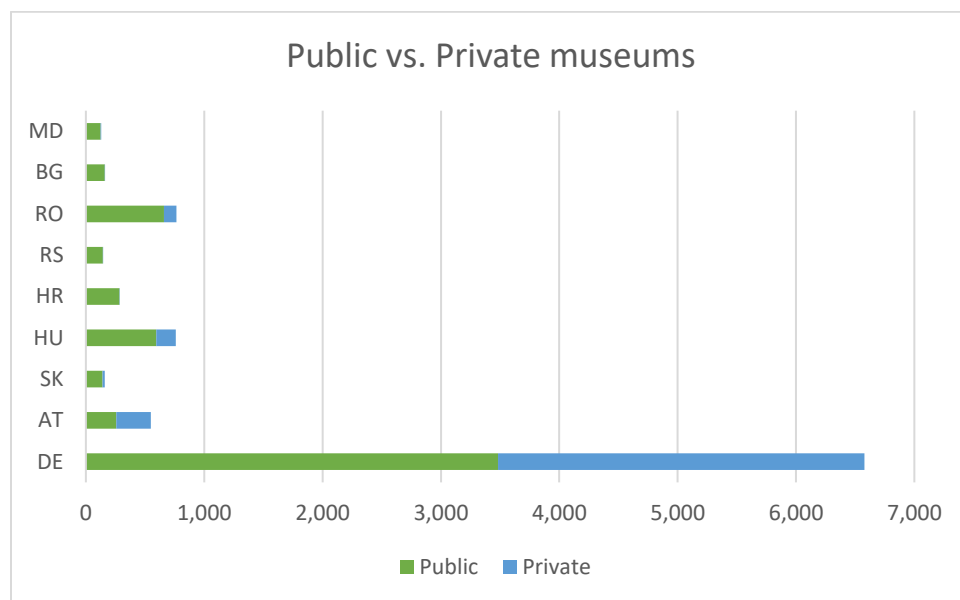
Graphic: G.Jordanov, NTC BG Guide

1.2.1.3 Context for Firm Strategy and Rivalry

Museums could not well fit into the purely business construct, thus rivalry, competition and company strategies based on those factors are not fully applicable to the museums (Dietrich, 2009). Competition to public museums from private ones is further limited. Public museums are usually holding the most valuable cultural heritage and thus, they have a clear market advantage. However, due to the expansion of the scope of the protected items and the budgetary limitations of the public institutions, private involvement becomes increasingly important as a supplementary rather than competitive force ⁸⁵. The existence of private museums is more prevalent across the Central

European countries representing the Museum Cluster, while in the Eastern and Balkan ones such are almost non-existent. (EGMUS, 2022) (National Statistical Institute – Republic of Bulgaria, 2022) (Suruceanu, 2021) (Klamer, 2013).

Figure 5: Number of private and public museums, total/free attendance, 2015-2019



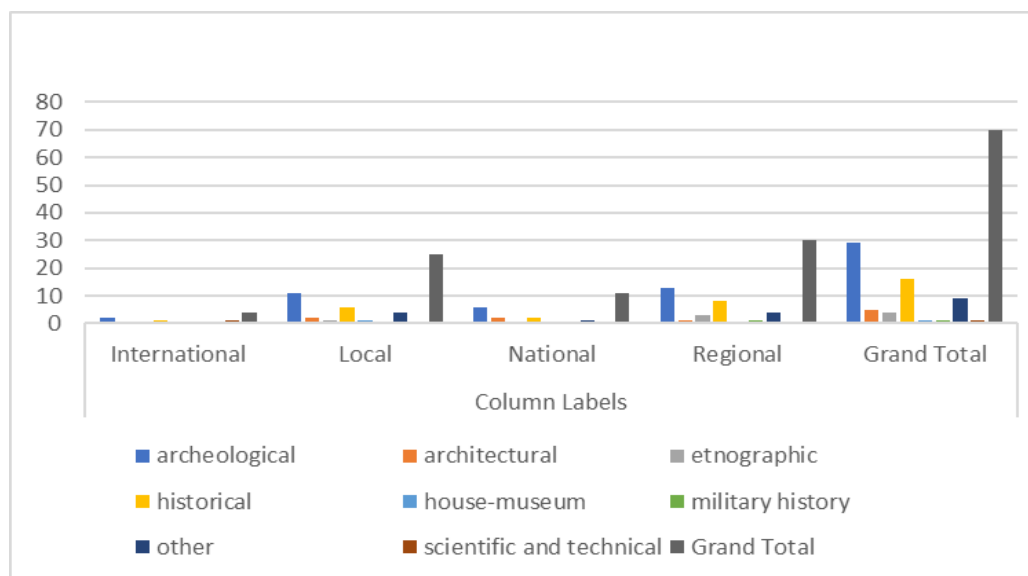
Source: EGMUS; National Statistical Institute – Republic of Bulgaria; Suruceanu, V.

Graphic: G. Jordanov, NTC BG Guide

In most cases, the customer choice of the museum visitor is based on a territorial rather than purely product considerations. This is due to the fact that the mass of the museum visitors chooses a museum due to its territorial proximity and thus the competition is not within the similarly themed museums, for example - archaeology, but rather than museums and galleries set on other topics. Thus, indirectly a competition over public financing may occur between museums based on their visitor numbers (Klamer, 2013). Another layer of competition based on the aspect of territory is the division between national, regional, and local museums. Until recently, national museums were the ones holding and exhibiting the most valued archaeological finds and historical artefacts. Further, national museums are often with better access to finance than their regional and local counterparts. In that respect, it should be noted that most museums and visitor centres revised in the survey are regional and local. In terms of tourist information centres, only the one based in Chisinau, Moldova is with national scope, whereas all the rest are with local one. However, the Chisinau centre is owned and managed by the local municipality like all of the surveyed tourist information centres.

Thus, competition should be more understood in terms of territorial situation. As visitors visit clusters of museums, cooperation should be sought on local and regional Danube level, which will set the Danube museums, visitor centres and tourist information centres on a higher competitive level. Competition would thus be externalized and be towards the neighbouring regions as well as the “super-star” heritage-rich regions such as the Adriatic-Ionic and the Mediterranean.

Figure 6: Types of museums and visitor centres



**a survey conducted in 2021 within the Living Danube Limes project by NTC BG Guide*

Source: NTC BG own source

1.2.1.4 Related and Supported Industries

The most relatable industries to museums would be the wider cultural sector, the wider research sector of a given region, the educational system which would provide the necessary specialists to the museums, creative industries which will support the digitisation and communication of the cultural heritage. The current territorial proliferation of such industries should also be taken into account. Cultural and creative industries tend to be more prevalent in big cities (Baycan, 2011), thus, such related and supported industries should be set around the parts of the Roman Limes that are close to the national cores - such as around Vienna, Bratislava, Budapest, Belgrade, and to a lesser extent around the national peripheries of Romania, Bulgaria, Moldova.

Research, vocational and higher education as sectors on their own provide the necessary staff and know-how to the museums. The number of researchers, curators and non-specialist staff varies greatly across countries (Boylan, 2011). During the recent years the European countries have experienced a great decline in the demand for archaeologists, however, the mobility of archaeologists across them increases (Karl, 2014). Thus, the museum cluster could facilitate greater mobility of the resources of the related and supported industries through increased networking and greater visibility of the needs of the local museums. Such mobility may be accelerated by programmes for mobility of academics and researchers.

Other related and supported industries are those related to the factor of tourism, especially specialised forms of tourism. As already presented in the national cases, specific forms of visits are of great importance on local level. Such would be the wine and spa tourism in Moldova, cycling tourism in Croatia or the cruise ship tourism along the Danube, which, as already presented for Bulgaria, is a major factor in the cases of smaller regional museums, substantially increasing the number of visitors. On the contrary, the lack of developed supporting sector, such as the lack of re-

enactment groups in Serbia which impedes the organisation of festivals and other Roman heritage events, or the lack of proper souvenirs which could be sold to the tourist and museum visitors.

The river cruise tourism is of increasing importance. Since the opening of the Rhine-Main-Danube canal in 1992, the cruise ship tourism on those rivers became the world leading market for river tourism and the fastest growing tourism sector in Europe with 2014 seeing a yearly passenger growth of 30%, passing the mark of 1 000 000. CNNR (2018) Annual Report 2018. Inland navigation in Europe. Market observation. Central Commission for the Navigation of the Rhine (CCNR) [Online] Available from: <https://www.inland-navigation-market.org/en/rapports/2018/q2/7-river-cruises/> The characteristic of the river cruise passengers is that they are wealthy, with higher cultural participation and willing to spend on culture, including cultural heritage.

Furthermore, the cruise shipping industry along the Danube is trying to diversify its routes, including many Lower Danube ports and sites. That has already increased the number of visits in many local museums from the side of the cruise ship passengers. Other purely shipping consideration as the fact that one of the biggest shipyards on the Danube are located in Eastern Romania are also positive. All of listed supporting industries could be used as the basis for the establishment of a cultural route, which could connect the museums, visitor centres and tourist information centres of the Museum Cluster.

1.2.1.5 Government

The legal and institutional arrangements of the revised museums, visitor centres and tourism information centres should be sought in two directions. The first direction is the national, i.e., the national legislation and support that is provided by the national government. The second one is the international one, being set by the policies and activities of international institutions such as the Council of Europe, UNESCO, the European Union, etc. As presented by the national cases, such support or legal clarity exist in great variations. In Austria, for example, the government is involved in the development of various support schemes such as financial instruments, whereas in Moldova, most of the financing of the sector is provided by international programmes and projects.

Besides the level of financing provided by the different nation states, there are also present differences across the accent of their financing and policies. As previously described, the government of Hungary is particularly concentrated on the socialization and protection of castles and fortresses, while the government in Serbia is actively promoting the development of cultural historic routes for tourists and visitors. These differences could prove beneficial, as exchange of know-how and best practices between officials from the DLMC countries could lead to the development of better targeted state policies regarding museums. That would be especially valid for a common effort towards the listing of the Danube Limes in the UNESCO indicative list for world heritage.

1.2.2 Museum Cluster Map

Michael Porter’s Cluster Map model is based on the idea that organizations can be grouped into clusters, which are groups of organizations that are similar in terms of their competitive environment, resources, and goals. The model was initially developed for businesses but has since been adapted for use in other areas, such as museums.

Museum cluster maps allow museums to identify areas of overlap and potential collaboration between different museums in the same region. This can help to create a stronger network of museums, allowing for greater communication, coordination, and collaboration. The maps can also be used to identify areas of potential growth, such as new exhibitions or educational programs. In addition to identifying areas of overlap and potential collaboration, museum cluster maps can also be used to identify areas of competition. This can help museums to better understand their competitive environment and develop strategies to better compete in the market. It can also help them to identify areas of potential growth and innovation. Museum cluster maps are a valuable tool for museums to better manage their resources and plan for the future. The Cluster Map model can be adapted for use in a variety of different contexts, making it an invaluable tool for museums, especially in the case of the (Living) Danube Limes Museum Cluster.

The following cluster map and value chain outline the scope of the Danube Limes Museum Cluster. The cluster map shows cluster inputs, processes, and supporting industries which are already developed, or which are to be created or improved in order to attract higher-end customers.

Figure 7: Danube Limes Museum Cluster Map



Source: NTC BG Guide analysis, own elaboration

1.2.3 Museum Cluster Value Chain

In recent years, the value chain has become an increasingly important tool for museums looking to grow their business. The value chain, developed by Michael Porter, is a model of how businesses create value for customers, and it can be used to help museums identify new opportunities for growth and develop strategies for improving their operations. The museum cluster value chain is composed of five distinct activities: collection, preservation, exhibition, education, and marketing. Each activity plays an important role in creating value for customers and ensuring the museum's long-term viability.

The first activity in the museum cluster value chain is collection. Museums collect artifacts and works of art from various sources and curate them to create an interesting and informative collection. This activity requires museums to have an in-depth knowledge of the field and an understanding of what artifacts are important or have historical significance. In the case of the Danube Limes Museum Cluster such artifacts will be related to the Danube limes, to the Roman heritage.

The second activity in the value chain is preservation. Museums use various techniques and technologies to preserve artifacts and ensure their longevity. This includes climate control, storage, maintenance, measures of risks, etc. This activity is essential as it ensures the artifacts remain in optimal condition and can be enjoyed by future generations.

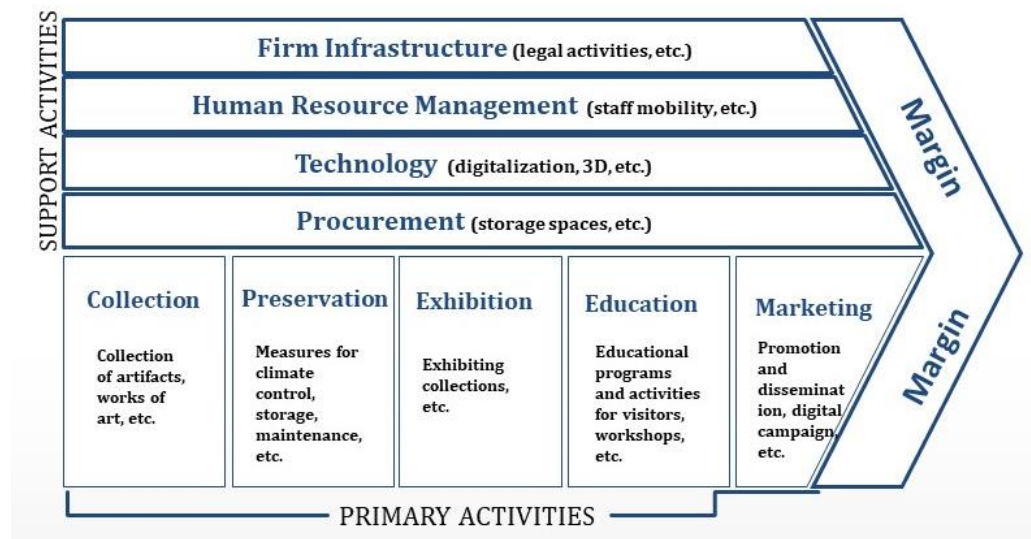
The third activity in the value chain is exhibition. Museums display their Roman heritage collections in galleries, allowing visitors to appreciate the art and artifacts on display. This activity also helps to create an immersive experience for visitors, allowing them to learn more about the Roman history and culture of the artifacts.

The fourth activity in the value chain is education. Museums often provide educational programs, organize various workshops and resources to help visitors gain a greater understanding of the Roman collections and artifacts. This activity helps to create deeper connections between the museum and its visitors.

Finally, the fifth activity in the value chain is marketing. Museums use various methods to promote their collections and exhibitions, including print and digital campaigns, as well as outreach and engagement activities. This activity helps to spread the word about the museum and ensure people are aware of its Roman heritage offerings.

The museum cluster value chain is an important tool for museums looking to grow and develop their business. By focusing on each of the five activities in the value chain, museums can ensure they are creating value for customers, developing their operations, and staying competitive in the market.

Figure 8: Museum Cluster Value Chain



Source: NTC BG Guide own elaboration based on Porter, M.E. (1985) Competitive Advantage: Creating and Sustaining Superior Performance, Simon & Schuster

2 Danube Limes Museum Cluster Concept

Desislava Mincheva-Yordanova, Nouha Ben Salem and Georgi Jordanov (NTC BG Guide)

2.1 Concept and Idea

A museum cluster is the material accumulation of museums in a common area, working together with local providers, tourist sites and public sector units. There have been discussions in literature about its distinctive characteristics, as the massive expansion in number, size, and importance of the museums in not-so-distant time has also boosted the number, size, and most of all visibility and impact of the established clusters⁸⁶. A museum can achieve better levels of competitiveness when it transcends the limits of its own capability to tackle challenges and solve problems. This approach is helping them distinguish innovative market possibilities, understand about good practices and be more inventive⁸⁷.

The main outputs of creating museum cluster are coherent museum brand/quality label, implementation of good practices and innovative technologies, and involvement of local communities.

The main objectives of a museum cluster could be stated as follow:

- **Developing synergies:** Even if the museum will still depend on its available and internal operational system, it will yet use the synergies, resources, opportunities developed through the cluster to better achieve results. It will receive tailored support through sharing of information, upskilling and reskilling programs, risk, and crisis management etc⁸⁸.
- **Building a label:** A high-quality label has the power to grow a business and build a brand. It can passively promote the offered products and services and can help people distinguish the good and proven quality. Some of the benefits of having a quality label is to refer to certain standards or accreditations, subsequently this has the power to grow business, provides information, meet legal requirements, offer quality of service, etc.⁸⁹
- **Creation of a positive spillover effect on the development of the local communities:** synergies boosting, and brand positioning will help to foster the public and private dialogue and catalyze the funding opportunities and private sector initiatives for the development of the socio and economic environment of the surrounded communities of the cluster.

To put in practice those concepts, the Danube Limes Museum Cluster will be established in the framework of the “Living Danube Limes” project to connect and involve a chain of cultural heritage sites, museums, visitor centres, etc. located along the Danube River. It will be the basis for the transnational network of living history on the Roman heritage sites along the Danube with focus on

⁸⁶https://upcommons.upc.edu/bitstream/handle/2099/12564/C_109_2.pdf?sequence=1&isAllowed=y#:~:text=According%20to%20the%20basic%20definition,of%20museums%20in%20one%20place

⁸⁷ <https://www.tandfonline.com/doi/abs/10.1080/09647770903529434>

⁸⁸https://clustercollaboration.eu/sites/default/files/news_attachment/European%20Expert%20Group%20on%20Clusters%20-%20Recommendation%20Report.pdf

⁸⁹ <https://www.gblabels.co.uk/importance-of-quality-labels/>

the Roman Limes in order to transform these places to a holistic archaeological site and a heritage attraction within the region.

2.2 Museum Cluster Members

2.2.1 Mapping and identification

The used methodology for the identification and establishment of the Danube Limes Museum Cluster was based on the preparation of desk research by all project partners to inventory all historical museums, visitor centers and tourist information centers located in and around the Danube and to describe their potentials, offers and services with a focus on the Roman History museums. 128 organizations were identified among the ten partner countries (Austria, Germany, Czech Republic, Slovakia, Hungary, Croatia, Serbia, Bulgaria, Romania, and Moldova).

The second step of the methodology consisted of conducting two surveys with all the identified museums, visitor centers and tourist information centers. The first survey with participants from different sites in all Living Danube Limes partner countries helped to draw up answers on the type of the existing organizations, its relation to the roman history, its level of importance to the visitor experience, the size of its premises, the number and profile of local and foreigner visitors, the seasonality and the entrance fees, their means of interactions with visitors, their level of cooperation with the stakeholders, their encountered opportunities and challenges, their interest in joining a museum cluster, their expectation of participation or not in it. The second survey used open-ended questions and was addressed by the Living Danube Limes project partners to all identified Danube Limes museums, tourist information centres, visitor centres, to map and assess their level of readiness for the cohesion of the Danube Roman Limes within a transnational networking under the Museum Cluster.

2.2.1.1. Types of heritage institutions

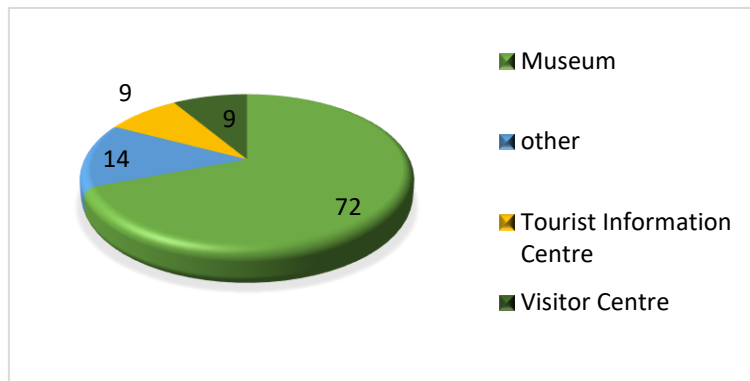
Types of analyzed sites:

There are 4 types of analyzed sites that are identified for the purposes of the research:

- Museums - institution that cares for a collection of artifacts and other objects of artistic, cultural, historical, or scientific importance.
- Visitor Centers (VC) - placed at a specific attraction or place of interest (landmark, fortress, etc.) providing information and educational exhibits and artifact displays.
- Tourist Information Centers (TIC) - concern larger areas, e.g., cities, and provide visitors to a location with general information on the area's attractions, lodgings, maps, and other tourism relevant items.
- Other – sites/monuments related to the Roman history.

The different percentages of all categories are identified on the graphic below. It highlights the fact that the main participants in the (Living) Danube Limes Museum Cluster are the Museums.

Figure 9: Categories of cultural heritage institutions

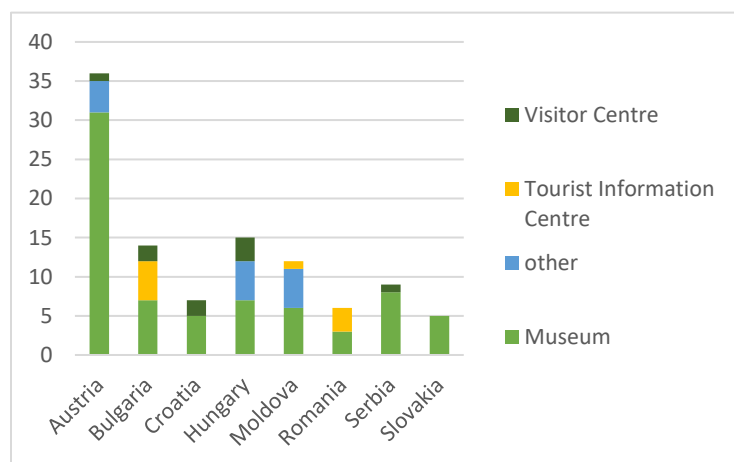


Source: NTC BG Guide survey, own elaboration

Geographical allocation:

In terms of survey participation, the representatives from Austria, followed by Hungary and Bulgaria have more sites than the other participating countries. Such higher participation rate could be explained by the stronger tourism industries on national level in those countries. Museums are the most represented institutions, with Slovakia being represented from museums only which could be interpreted based on the short but highly developed Danube bank there. The total number of different responders for each country are shown on the graphic below.

Figure 10: Geographical allocation



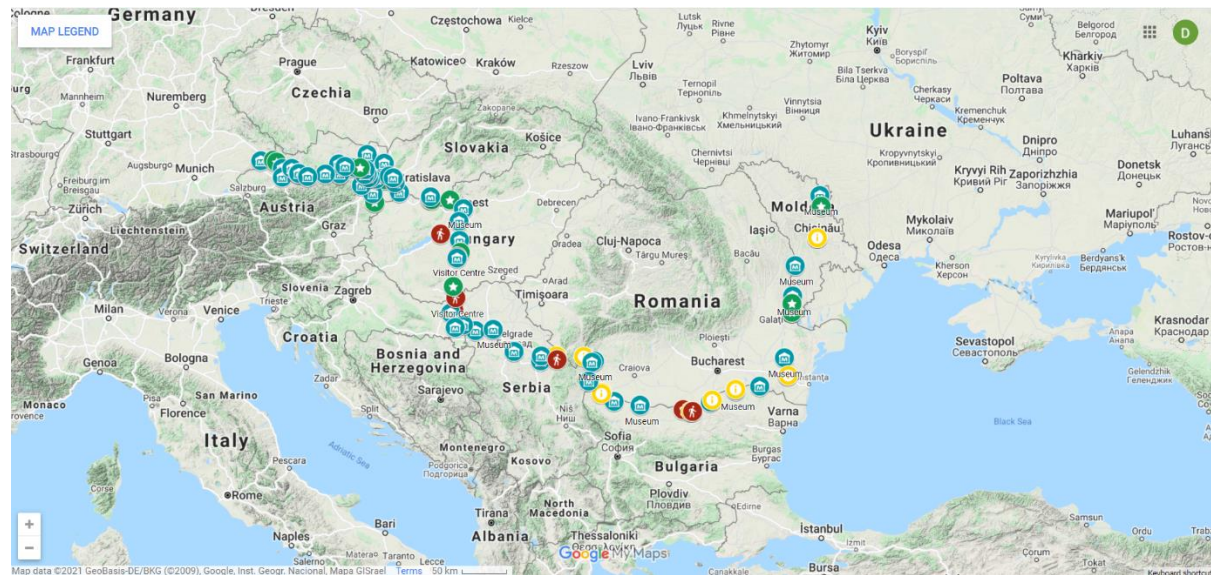
Source: NTC BG Guide survey, own elaboration

Within the Living Danube Limes project National Tourism Cluster “Bulgarian Guide” conducted a mapping of the future Danube Limes Museum Cluster’s participants based on several criteria for the evaluation of the setting of the museum cluster. The initially identified museums, visitor centres and touristic centres across Austria, Bulgaria, Croatia, Slovakia, Hungary, Serbia, Moldova, and Romania that are based on Roman heritage were classified by category/type, name, location, territorial scope, thematic scope, ownership, brief description, main type of exhibitions, part of a network/quality label, level of integrated tourist’s interaction, contacts, etc. Further, the survey participants from the prospective cluster were asked

on their institution`s relation to Roman history, the size of their premises, the entrance fees, the seasonality of visits, the profiles of their visitors.

The geographical allocation of the identified museums, visitor centers and tourist information centers in all partner countries is presented on *Google Maps graphic below.*

Figure 11: Locations of potential cluster members



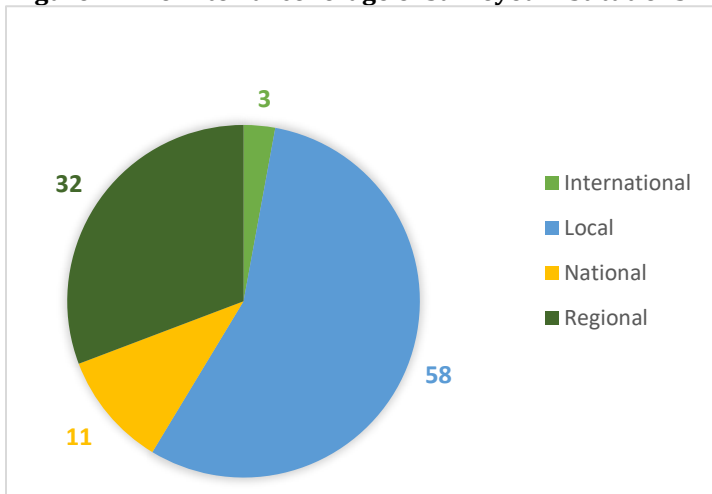
G. Jordanov (NTC BG Guide), own elaboration using Google Maps

**based on the desk research conducted by the Living Danube Limes project partners*

Ownership, importance, and focus:

Most of the surveyed museums, visitor centres and tourist information centers have local or regional importance, and they are owned by municipalities (state-owned are the next largest group). Most of the respondent institutions have archeological and/or historical focus. The Danube Limes Museum Cluster will help the distinguished sites to increase their international importance, facilitating their efforts for their increased visibility, promotion and development. The private ownership of museums, visitor centers and tourist information centers is insignificant, which could facilitate a level of financial security for the most of the sites (as the private museums are more dependent on attendance in budgetary terms), but on the other hand makes them confined on the possibility of increased funding.

Figure 12: Territorial coverage of surveyed institutions



Source: NTC BG Guide survey

Figure 13: Ownership of surveyed institutions

Source: NTC BG Guide survey

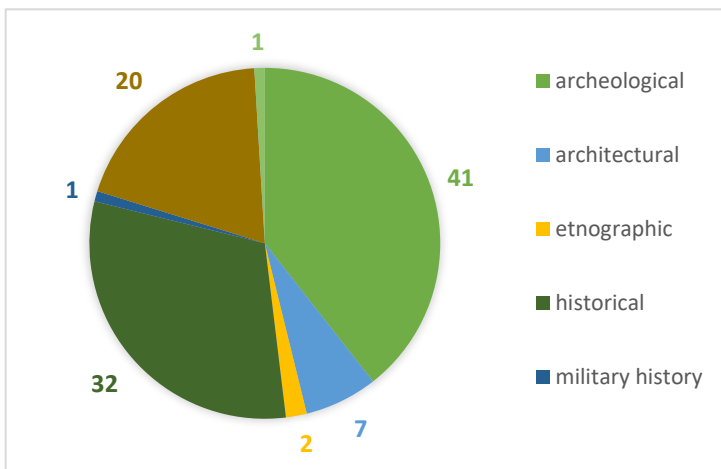
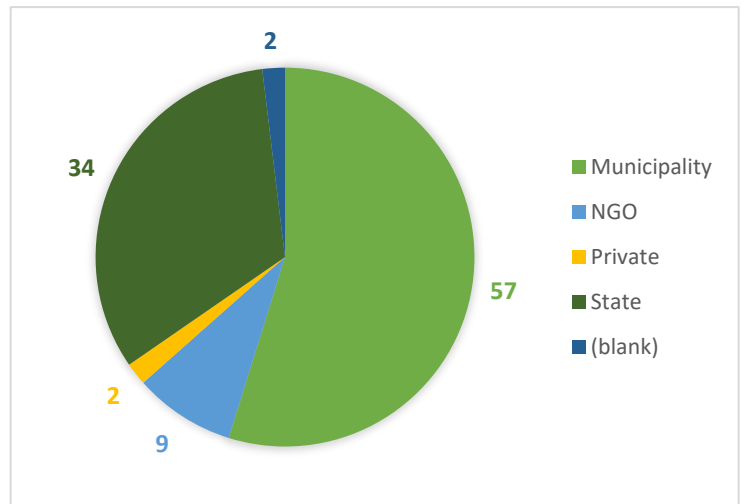


Figure 14: Thematic focus of the surveyed institutions

Source: NTC BG Guide survey

2.2.1.2. Level of innovation

The survey conducted by National tourism cluster “Bulgarian Guide” considered the level of integrated tourists` interaction (ITI), which is measured on a scale from 1-5 (from none to strong and integrated approach towards comprehensive tourist`s experience, including such via mobile app, Augmented Reality (AR)/Virtual Reality (VR), various quests, etc.). In general, very few of the surveyed museums, visitor centers and tourist information centers provided elevated level of integrated tourists` integration. None of the respondents from Hungary and Slovakia have marked anything (blank), which is considered a lack of information on what the sites are offering and further research in this direction would be needed. More than half of the participants, mainly from Bulgaria, Romania, Croatia, and Moldova, indicate a scale of level 2 and 3, which include basic informational materials, e.g., information boards, printouts, maps or average ITI - e.g., reconstructions, audio guides, Quick Response (QR) scanning, etc. 30% of the surveyed heritage institutions in Austria show a scale of 4 and 5 level (level 4 includes implementation of some innovative tools, e.g., mobile app, gamification, etc., but limited, level 5 is a strong and integrated approach towards comprehensive tourists' experience, incl. such via mobile app, AR/VR, etc.).

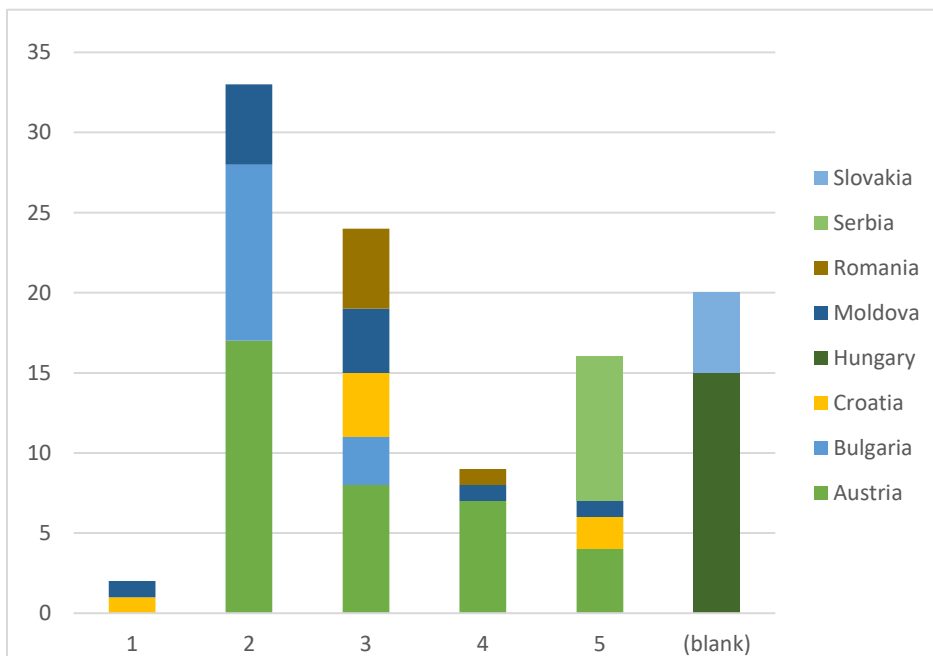


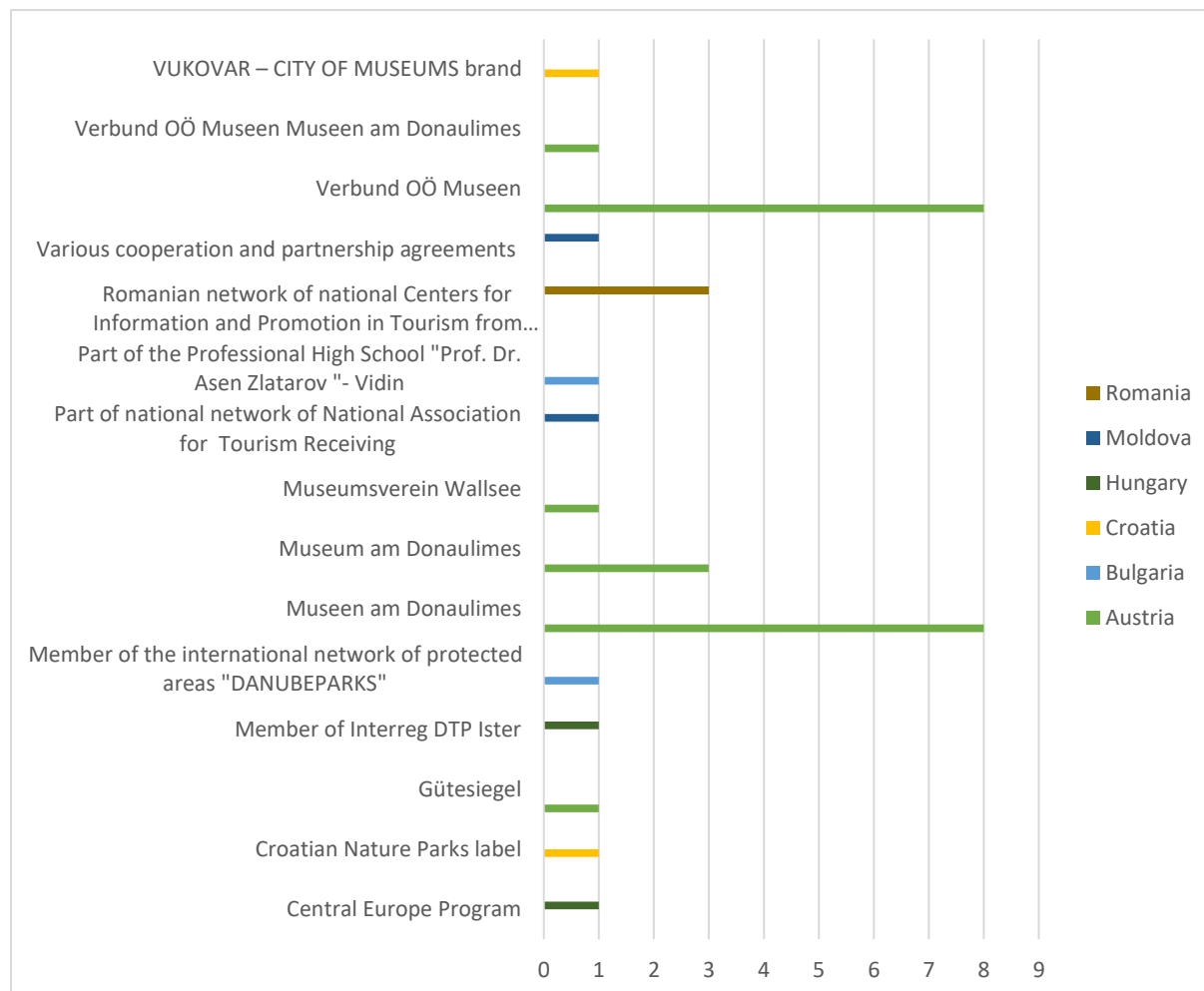
Figure 15: Level of innovation of the surveyed institutions

Source: NTC BG Guide survey

Labeling and networking

In terms of labeling and networking, respondents from Austria are the ones with the highest level of participation into a label or a network. The surveyed institutions from Serbia and Slovakia, however, do not have a single network, or label, at least not indicated from the respondents. However, most of the identified museums, visitor centers and tourist information centers sites are part of a network and or labelling system:

Figure 16: Participation to networks and labels of the surveyed institutions



Source: NTC BG own elaboration

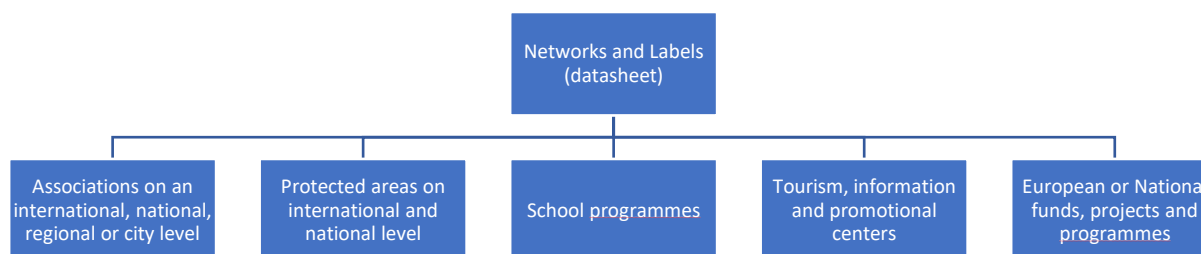
There are two main networks in Austria with most representatives:

- The “Museums on the Danube Limes” indicates 12 members. Some of the main goals of the non-profit association are to support protection, research and presentation of the moveable material remains of the Austrian Danube Limes, to support and release improvements of the museums’ exhibitions, to advance the collaboration with research institutions and the national heritage board, to encourage the members to collaborate in projects, to stimulate the cooperation with foreign museums with similar orientation, to intensify the cooperation with schools. Several festivals are held to expose the devices/tools used by the Romans with presentations about the making of weapons, clothes were made, to do experimental archaeology with many reenactment groups thus bringing history into present through experiment and experience.

- The “Association of Upper Austrian Museums” unites 9 members. It is a non-profit association which offers advises and services for all around 300 museums, collections and museum-like institutions throughout the state and support them in public relations. Its main goals are qualitative further development of the museums, promotion of the conservation and safeguarding of the collections, scientific support and so on. The association is participating in digitalization projects – for training, intercultural exchange, and modern app presentation of its members with basic and relevant information.

On the graphic below, there are all the different categories of networks/labels that are summarized, based on the conducted research:

Figure 17: Categories of networks and labels



Source: NTC BG own elaboration

These categories are generalizing all the networks/labels that are collected and they show the various approaches and characteristics of the further formed cluster. They include common initiatives and unified organizations, based on interests on city, regional, national, and international level, based on environmental issues, nature territories/parks, or protected areas, on national and international level. Common school programs are the first ground to share any knowledge and reach potential target groups. Common funds and initiatives under European programs are the main resource to make progress, especially in a lot of the shrinking cities and areas on the Danube Region. The categories show the best practices (value of collections, social value, educational value, economic value) in networking and labelling that can also be seen in some of the best examples worldwide - as NEMO (Network of European Museum Organizations), Europa Nostra, ICOM (International Council of Museums), etc.

The museums are the primal survey participants with a relation to the Roman history as archaeological site or exhibition. They additionally rate the importance of the visitors’ experience to the Roman heritage as important and very important, which is essential for future development initiatives to be taken by the Living Danube Limes Museum Cluster.

The additional answers to the question of the size of the premises reveals that the responding institutions have sizeable premises, so they predispose for a longer stay of the visitors as well as further possibility for additional activities such as hosting of other cultural events. The number of visitors is not high for most of the places, so there should be further measures to attract more locals and foreigners through promotion and other marketing arrangements. The lower number of visitors,

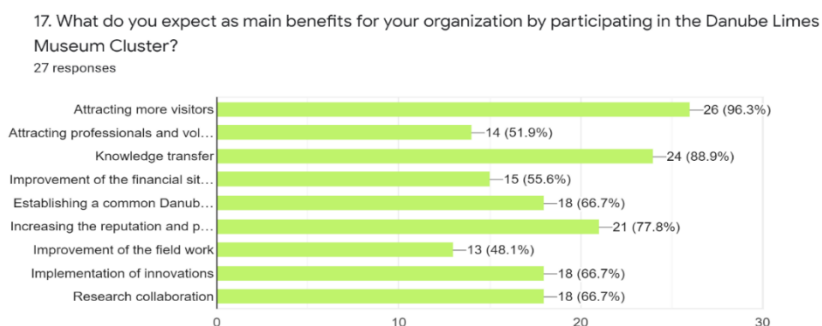
plus the absence of entrance fees for the majority are not providing any significant income for the sites.

2.2.1.3. Benefits for cluster members

The willingness of the surveyed heritage organizations to take part in the Danube Limes Museum Cluster is primarily described as “interested” and “highly interested”. This is the first and most significant positive sign for future activation of the cluster. The main benefits of such joint participation are the development of the tourism sector through visitors’ mobility between different sites and places, the transfer of knowledge, the promotion of the places, the implementation of innovations, etc. As the statistical data are showing below, the need for more visitors and promotion is essential for most of the participants. Innovations are recognized as a valuable tool, too, which is one of the main outputs of the project’s implementation.

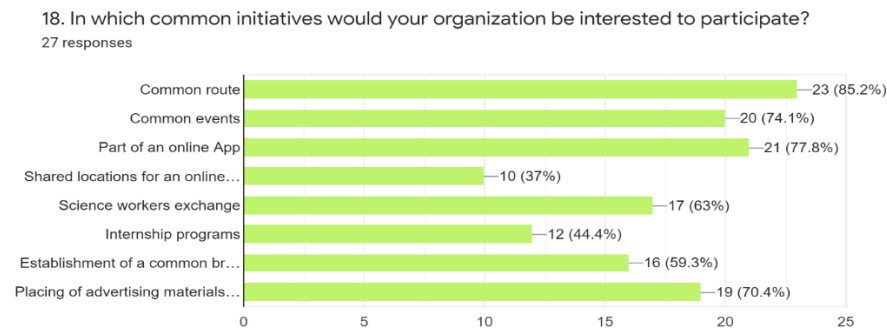
Figure 18: Benefit expectations from participating in the museum cluster

Source: NTC BG Guide survey



The common initiatives to which the organizations are interested to take part in are the establishment of a common route and the setting of common events, the development of an online application, the placing of advertising materials of other member-organizations, incl. information boards, etc. It is all based on shared knowledge, activities, promotion, and innovation.

Figure 19: Willingness to participate in the activities of the museum cluster by category



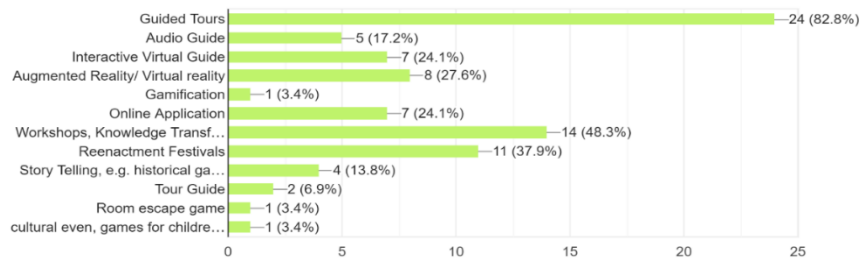
Source: NTC BG Guide survey

2.2.1.4. Benefits for visitors

Based on the answers from the organisations/institutions that took part in the survey, the main cultural heritage interaction possibilities for their visitors are the guided tours, the workshops & knowledge transfer, the reenactment groups, etc. Except for the reenactment groups, these are the main activities that should be offered to the visitors. Gamification as a cultural heritage interaction tool is almost not indicated by the survey respondents, even though it is one of the modern trends in interaction. Similarly, the introduction of other innovations should also be intensified – as with the development of mobile applications, augmented and virtual reality, etc.

Figure 20: Visitor interaction techniques

9. Interactions with visitors:
29 responses



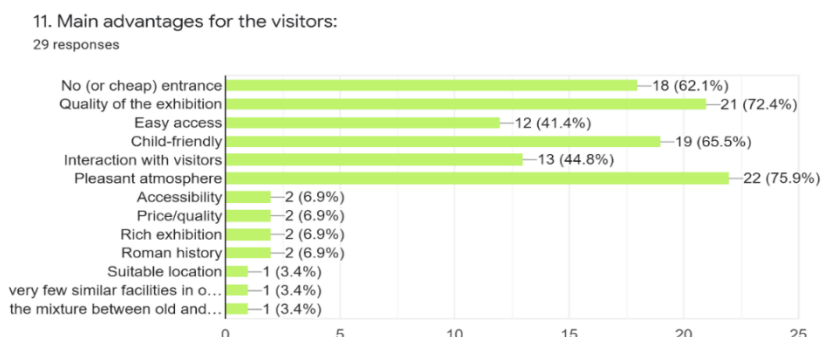
Source: NTC BG Guide survey

Most of the survey respondents offer guided tours mainly in English and German languages. However, those offers should reflect the characteristics of the visitor flow. In cases when specific visitor groups are overrepresented, then it should be considered a good option for the cultural heritage institutions to offer tours in their spoken language (e.g., Bulgaria is visited by a sizeable number of Russian speakers, so Russian may be set as a language of the guided tours in Bulgarian museums). In general, the implementation of the cluster along the Danube should consider offering its products and services in more languages to reach a wider audience.

The main advantages for the visitors according to the surveyed heritage institutions are the pleasant atmosphere, the quality of the exhibition, whether the site is children-friendly, the price or the absence of an entrance fee. Given the estimation that the exhibitions or the site itself are the main point to attract the visitors, it would be very important for those to be kept in a good condition. New ways of cultural heritage interpretation should be used in guided tours and exhibitions with a focus on the meaning and value that the heritage brings to the different types of visitors and to the local community.

Figure 21: Visitor preferences

Source: NTC BG Guide survey



2.2.1.5. Collaboration and Cooperation

The existing collaboration of the participants with local stakeholders is mainly with the local authorities and municipalities, the national authorities, and the local communities (e.g., reenactment group, craftsmen, etc.), etc. The collaboration with local authorities is crucial, as the ownership and the management of the museums, the visitor and the tourist information centers are generally on municipality and local level. Further cooperation is needed with local small and medium enterprises (SMEs), which in most of the cases represent the backbone of the local economy, especially along the Lower Danube.



Figure 22: Existing collaborations with stakeholders

Source: NTC BG Guide survey

Below are described some of the examples for successful collaboration according to the participants in the conducted survey:

- Had historical lessons with scholars/gave tourist materials at local hotels/restaurants.
- The municipality takes care of the archeological site (sanitary, toilet, etc.).
- Financing non-reimbursable funds project, rehabilitation of the historical monument.
- Museum pedagogy.

Living Danube Limes

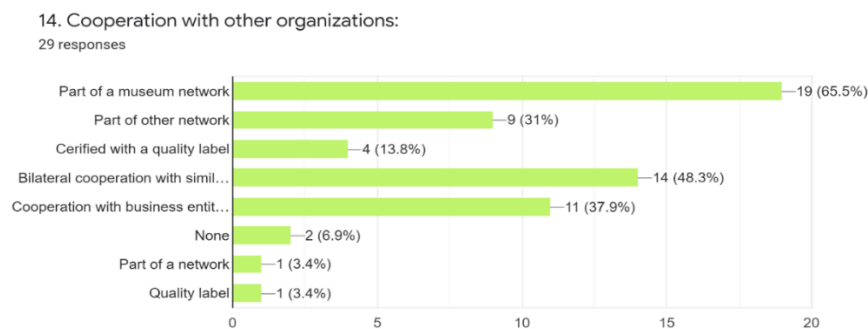
- Cooperation between Tourist Center and Cultural Institutions in order to organize events that promote local values, as history, culture, spirituality and ethnography.
- Collaboration with primary and secondary schools.
- Participating in projects, archaeological excavation, lectures.
- Communication activities with local Tourist Board Office.
- Organization of Roman days in cooperation with local Tourist Board and Town Council, which includes local manufacturers, businesses, and craftsmen.
- Cooperation with several reenactment groups, resulting not only in their active participation in festivals and other events, but also organizing joint workshops.
- Cooperation with local businesses for setting up exhibition.
- Digital map of a site with national department of monuments.

The survey participants also shared their experience on the implementation of good practices from other organizations:

- Interpretation of cultural heritage via theatrical methods - puppet show.
- International exhibition, which is realized in cooperation with different museums.
- Reconstruction of traditions, reconstruction of battle scenes, creation of a web site, online advertising.
- Museum pedagogical presentations, activities.
- Thematic guides.
- Experience exchange with Danube Guides.
- Museum pet friendly, allowing visitors to enter with their pets.
- Museum activities for children.
- Inspiration for exhibitions, educational lines.

The cooperation with other organizations is based on the subsequent networks and connections – part of museum or other network, bilateral cooperation with similar organizations, cooperation with business entities, e.g., travel and event agencies, etc. The participants are aware of the importance of being part of a network, so they can compete together and support each other, via the use of innovative and upgraded services and products, common knowledge, good practices, and strategies, etc.

Figure 23: Existing cooperation with other organisations



Source: NTC BG Guide survey

These museums, visitor centers and tourist information centers also showed their interest to contribute to the establishment of the (Living) Danube Limes Museum Cluster mainly through the sharing of knowledge, advertising, workforce mobility, etc. This can eventually mark the first stages toward the promotion of a common network of museums and other cultural heritage sites. Through the involvement of volunteers and local communities, the members already predispose with the necessary knowledge, premises, advertising tools and experience to collaborate under one common vision.

20. Would your organization contribute to the establishment of Danube Limes Museum Cluster?

How?

27 responses

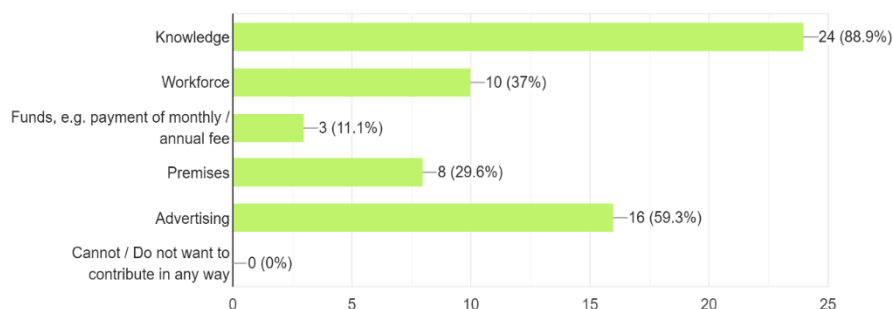


Figure 24: Willingness and ways to contribute to the establishing of the museum cluster

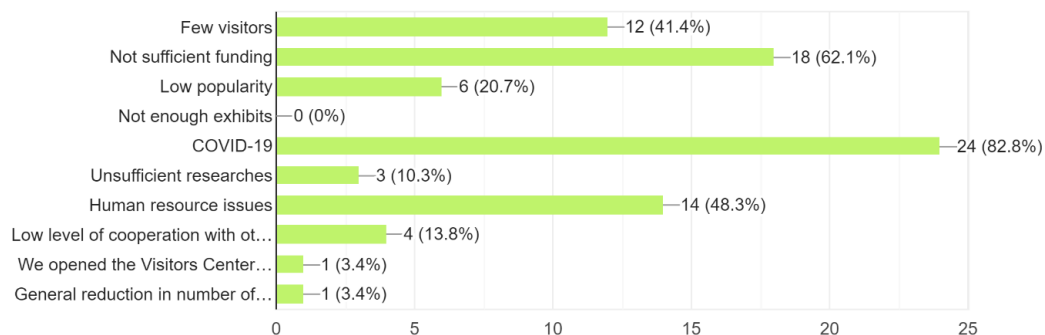
Source: NTC BG Guide survey

Challenges and obstacles:

One of the main challenges for the cultural heritage organizations is connected to the COVID-19 pandemic (a sharp decrease in visitors and the connected income). The museums, visitor and tourist information centers should consider finding alternative strategies to adapt to the situation (implementing innovations and modern technologies). European Union and national programs are hence a chance to find additional funding for development and adaptation to such crises.

13. What kind of challenges are faced by your organization?

29 responses



**Figure 25:
Challenges**

Source: NTC
BG Guide
survey

The main obstacles for all the survey participants not to join the museum cluster are associated with the fact that they do not have enough information and knowledge on the goals and benefits of such formation. The need for further approvals (e.g., from the principal of the organization) and not enough available resources (human, funds, premises, etc.) are the other difficulties. These are the main steps for implementation, which will help further approvals and finding available resources.

2.2.2 Strengths of the identified museums

The second survey conducted by National Tourism Cluster “Bulgarian Guide” focused on various subjects which represent the scope of the practices of the museums, visitor centers and tourist information centers in management, marketing, research, innovation, local community development, corporation with SMEs, international partnership.

The findings of the survey could be summarized, as follows:

- Experience within regional or international convention, agreement, cultural routes programs and reflective practices:** Many of the targeted museums, visitor centres and tourist information centres are familiar with the activities of the Limes Congress forums and of the UNESCO World Heritage site agreement for the Danube Limes, either through their national commissions for UNESCO or through their specific Limes networks. The Limes Congress represents a first step for linking the Danube museums within one of the unique networks of researchers and specialists in the Roman frontiers. The most evoked cultural route programs were the Iron Age Danube Route, the Roman Emperors and Danube wine routes, the tourist route Art and Culture under the INTERREG V-A Romania-Bulgaria programme.

Some of the observed common outcomes quoted by the museums, visitor centres and tourist information centres because of their participation in such initiatives were the organization of sculpture camps and living history festivals, undertaking archaeological research and excavation of heritage sites, creation of promotional materials, holding regular

meeting with volunteers and schools. Such are the cases with the Intersica museum in Hungary which conducted excavations in and around the military camp of Intercisa Roman settlement as part of the preparation for the World Heritage tender, and the case of the DanubeParks Network in Croatia which has developed a tourist trail - called Returning to the last Danube - about 8 natural parks from different Danube countries while incorporating the Danube Limes in the trail story and its discovery tools. There is the case as well of the historical museums of Tutrakan (Bulgaria) and Calarasi (Romania) with their joint project "Innovative cultural bridge for sustainable regional development" which aims to use the rich cultural and historical potential of the Tutrakan and Calarasi cities to increase the number of tourists and visitors to their cultural sites.

- **Form of collaboration with similar structures within the Danube region with focus on the Limes:** Guided tours, onsite and online exhibitions, seminars, and festivals are the most and commonly used collaborative approaches between Danube museums, VCs and TICs. One cited example from the survey was the Bratislava Tourist board with its support to the logistics and promotion of the Limes Day event by providing guided bus tours to the Slovak and Austrian Roman sites and by creating specialized Celtic-Roman brochures for the visitors of the city.
- **Form of collaboration with local business structures:** Although not yet quite common as a lucrative practice for city marketing among the Danube museums, visitor centres and tourist information centres, some however are implementing collaborative deals with hotels, pensions, bike riding and cruise companies and travel agencies, to promote and include the heritage places into their programs for visitors or to offer admission discounts to the touristic premises. The Regional Museum in Mikulov (Czech Republic) cooperates with some special hotels of the region so that guests may benefit of admission discounts. The tourist information center in Weißenburg publishes every year the local travel magazine "Urlaubsmagazin" for tourists where it includes a brochure with local hosts/hotels/pensions.
- **Type of marketing practices and knowledge transfer tools:** When asked about their best practices for attracting visitors to discover and learn about the heritage, most of the museums, VCs and TICs showed an active use of their online platforms and respective social media pages to announce their news in terms of events, tours, discoveries besides their use of the regular promotional materials such as leaflets, posters, information signs. As for the methods used by museums and visitor centres to unlock the potential of their Roman collection and heritage sites and to share the knowledge with their visitors, the most common cited ones were guided tours, library services, movie screening, seminars, and re-enactment activities. Gamification is not yet a common practice in most of the identified museums as it requires further investment and close collaboration with institutions and companies specialized in digital innovation and mobile application development for the games.
- **Willingness to join a Danube Roman Limes Cluster' activities:** While most of the interviewed museums, visitor centres and tourist information centres agreed on the proposed idea of making a Danube Roman Limes package offering admission discounts to encourage locals and tourists to visit a multitude of museums, visitor centres, parks, other expressed interest in joining efforts and participation in the Roman Danube Cultural Route, in the Danube Limes App, in sharing knowledge and best practices through seminars, mobility programs and living history events.

Further to these observations, it is important to note that evaluating the level of commitment and involvement of the potential participants in the DLMC is subject to the existing disparity between the facilities from the Upper and Lower Danube:

- The Roman museums connected to the pilots in the Upper Danube sections demonstrate a better experience in generating a significant sense of engagement and belonging with its communities in comparison with the Roman museums located in the Lower Danube section. This is mainly connected with the nomination of the western segment of the Roman Limes as a UNESCO world heritage and with the relatively better economic and socio conditions in that region.
- A digitalization gap was observed even between museums within the same country, which could lead to an increase of inequality and exclusion in cultural and education activities within a transnational cluster as small museums are yet not ready and equipped for a digital transformation as it is the case with big museums.
- Museums from Germany showed an advanced experience with projects and initiatives on the promotion of tourism using the Limes heritage, thanks to the work of the German Limes Road Association. The association had established two Limes routes where it successfully promote tourism in the region, inform and communicate locals and visitors about the Upper Germanic Rhaetian Limes as a UNESCO World heritage. German museums along the Limes had received extensive support from the association in developing and managing activities to draw the attention of the public to its routes. For example, the association used an existing Hiking trail and had supported its maintenance and advertisement in order to promote a discovery tour along the Limes on foot⁹⁰.
- Austrian museums as well have been identified with an advanced experience in the maintenance, and development of their cultural and historical sites as they benefit from the support of the “Roman Danube Limes” network in Austria where they are offered technical and financial backing such as for the improvements of the exhibitions and for the collaboration with local and international institutions with similar orientation.

2.2.3. Key Members of the Museum Cluster

In general, cluster members are classified into four categories⁹¹:

- Key institutions: are the main participants in the cluster and direct representatives and beneficiaries.
- Support business: are the public/private entities supporting– directly or indirectly- the core institutions with specialized products and services and are physically located close by.
- Soft support infrastructure are the public and private stakeholders facilitating and enhancing the performance of the core and support members. The development of any cluster depends on the quality of this soft infrastructure and the level of synergy within it
- Hard support infrastructure are the private and public stakeholders who provide the mandatory infrastructure facilities and services such as roads and ports, installation and maintenance, creation of bike paths, internet and mobile linkage, water treatment, mains electricity, etc.

⁹⁰ <https://www.limesstrasse.de/deutsche-limes-strasse/about-us/german-limes-road/?L=1>

⁹¹ Guidelines for Cluster Development. A Handbook for Practitioners, Maxwell Stamp PLC, 2013

The DLMC might be operating mainly under two industries, the tourism industry, and the cultural and creative industry. Its members are determined as follows:

- The key institutions are the history museums and the visitor centers (mostly the ones with focus on the Roman heritage), and the tourist information centers located along the Danube.
- The members identified as support business represent tour guides, travel agencies, re-enactment groups, craftsmen, artists, research centers with specific expertise related to history and archeology, SMEs or startups specialized in design, printing, online and onsite exhibition, events and advertisement, gamification, digital transformation and innovation etc.).
- The soft support infrastructure partners in the Museum Cluster represent the tourism and cultural NGOs, schools, universities, restaurants, theatres, hotels, etc.
- The hard support infrastructure partners are the represents the municipalities and related local authorities, port authorities, airports, water and electricity providers, etc.

The following section presents the potential key members of the (Living) Danube Limes Museum Cluster that were identified based on the Living Danube Limes project partners' desk research.

2.2.3.1 The Museums

Eight Roman heritage sites were identified in the project as pilot sites which will be part of the chain of the Danube Limes. The project further reconstructed a late Antiquity Roman ship from the Lusoria type which would sail along the Danube with the aim of turning the pilot sites into touristic hubs. The pilot sites were selected and evaluated depending on different criteria including various scientific, economical, touristic, logistical, and practical parameters.

The eight pilot sites are the following:

- Comagena (Austria),
- Bononia (Bulgaria),
- Ad Labores (Croatia),
- Gunzenhausen (Germany),
- Matrica (Hungary),
- Sacidava (Romania),
- Lederata (Serbia),
- Iža (Slovakia).

These pilot sites are revealed to the large public mainly through the following eight pilot museums:

- Tulln Roman Museum (Austria),
- Vidin Regional Historical Museum (Bulgaria),
- Osijek Archaeological Museum (Croatia),
- Archaeological Museum Gunzenhausen (Germany),
- Matrica Museum and Archaeological Park in Százhalombatta (Hungary),
- "Axiopolis" Museum in Cernavodă (Romania),
- National Museum Požarevac (Serbia),
- Danube Region Museum in Komarno (Slovakia).

In these museums, visitors may discover practices, rituals, and lifestyle from the Roman era along the Danube through the exhibited remaining of Roman fortress, Roman military camps, tomb stones, statues, pottery, agricultural tools and other artefacts collected from excavation work. The Roman period is also represented and interpreted through copies of Roman fortifications such as castle, fortress, limes, and monuments which pre-existed along the Danube.

To ensure a better attraction and valorization of the Roman Danube Limes, additional museums, were also identified - giving their location along the Danube, their potential in the development of the cultural and tourism activities along the Danube, their level of innovation in touristic services and products, and their capacity to host and attract more visitors. According to the desk research prepared by the Living Danube Limes project partners, the following groups of museums are located along the Danube, they exhibit the Roman history and heritage of the Danube and show a relatively important integrated approach towards comprehensive tourist's experience:

- In Austria:
 - Museum Carnuntinum,
 - City Museum Wels,
 - Museum Lauriacum,
 - Museum Wienertor,
 - Roman Museum Wallsee,
- In Bulgaria:
 - Silistra Regional History Museum,
 - Tutrakan Historical Museum,
 - Ruse Regional Historical Museum,
 - Svishtov Historical Museum,
 - Regional History Museum of Pleven,
 - Lom Historical Museum,
 - Oryahovo Historical Museum,
 - Regional History Museum of Vidin
- In Croatia:
 - Vukovar Municipal Museum,
 - Vučedol culture museum,
 - Ilok Municipal Museum,
 - Vinkovci Municipal Museum,
- In Germany:
 - Limeseum and Roman Park Ruffenhofen,
 - Gäuboden museum,
 - Historical Museum Regensburg,
 - Roman Museum Weissenburg,
- In Hungary:
 - Budapest History Museum,
 - Aquincum Museum and Archaeological Park,
 - Town Museum of Paks, Hanság Museum,
 - Intercisa Múzeum,
- In Romania:
 - Corabia Museum of Archeology and Ethnography,
 - Museum of the Iron Gates Region,
 - Carsium Museum, Museum of Archeology and Ethnography,

- In Serbia:
 - Museum of Vojvodina,
 - Museum of the Institute of Archaeology within the Archaeological Park Viminacium,
 - City Museum of Novi Sad,
 - Archaeological Museum of Đerdap,
 - Krajina Museum in Negotin,
- In Slovakia:
 - Bratislava Museum of History,
 - Bratislava Archaeological Museum,
 - Ancient Gerulata Rusovce,
 - Devín Castle,
 - Bratislava City Museum.
- In Moldova:
 - Homeland Museum Cahul,
 - Museum of History and Ethnography,
 - Museum of homeland from Pirlita,
 - Museum of History and Ethnography from Sculeni.
- In Czech Republic:
 - Regional Museum in Mikulov,
 - Visitors Centre Mušov Gateway to the Roman Empire

2.2.3.2 The Visitor Centres

Conceptually different from classic museums, visitor centres are an alternative space to connect visitors to a nearby natural or cultural heritage site. They are often set around a specific landmark, monument or archaeological finds, providing in-depth thematic information, maps, guided tours or maintain trails.

Along the Danube, the project partners had identified the following visitor centres which exhibit information related to the Limes or which are located near a pilot site:

- In Austria:
 - Visitor Center Kulturfabrik Hainburg,
- In Bulgaria:
 - Visitor Center of the archeological reserve Novae
 - Visitor Centre Park "Persina" in Belene,
- In Croatia:
 - Visitor Center Kopačkirit Nature Park,
 - Battle of Batina memorial center,
 - DanubeParks Network,
- In Hungary:
 - Lapidarium Brigetionensia,
 - Gorsium Archaeological Park and Open-Air Museum,
 - Archaeological Park of Paks-Lussonium
- In Serbia:
 - Golubac Fortress Tourist area.

2.2.3.3 The Tourist Information Centres

The attractiveness and the valorisation of the eight pilot sites are not confined to the exhibitions and collections of the museums. The role of the tourist information centres is of a mediator connecting the visitors to all different facilities existing in the areas. They have a significant impact in increasing the visibility and promotion of all cultural, touristic, and economic activities as they are considered the first point of contact for visitors within a destination. Therefore, they play an important part in establishing of a solid and interconnect the (Living) Danube Limes Museum Cluster.

The followings are the identified Tourist Information Centres (TICs) in their respective areas, which are located in the museums or nearby:

- In Austria: TIC in Tulln, Carnuntinum, Wels, Lauriacum,
- In Bulgaria: TIC in Vidin, Ruse, Tutrakan, Svishtov,
- In Croatia: TIC in Osijek, Vukovar, Vučedol,
- In Germany: TIC in Gunzenhausen, Gäuboden, Regensburg,
- In Hungary: TIC in Százhalombatta, Budapest, Paks, Hanság,
- In Romania: TIC in Moldova Nouă, Orșova, Cernavodă,
- In Serbia: TIC in Požarevac, Viminacium, Novi Sad,
- In Slovakia: TIC in Komarno, Bratislava.

2.2.4. Unique Selling Points

The following section highlights the local unique selling points of the eight museums connected to the pilot sites, considered as steppingstones for enhancing the local value of the individual sites and for improving their visibility in the international chain of Roman Limes museums in the Danube as well as in the whole former Roman Empire zone.

The following table presents these touchpoints in quality of distinctive characteristics and of knowledge transfer tools used for disseminating the features of the connected pilot site:

Table 4: Unique selling points (Living Danube Limes pilot sites)

Pilot site / Connected Museum	Structure characteristics / features	Knowledge Transfer tools
Comagena / Tulln Roman Museum–Austria ⁹²	<ul style="list-style-type: none"> • Modern museum building, part of the Museum <i>am Donaulimes</i> network. • Illustrated documentation through exhibited original finds and virtual app (Virtulleum App) showing depiction of military and civilian life in the Roman cavalry fort Comagena from 90 AD to 488 AD. • City tours on request to access preserved and protected archaeological sites. • Known remaining archaeological finds: preserved and protected Horseshoe-tower 	<ul style="list-style-type: none"> • Personalized guided city tours. • Thematic Small Roman festivals. • Age-specific educational programs and workshops for schools. • A model of the fort indicates its footprint in the current town map to show that locals and GH are taking many of the same

⁹² <https://erleben.tulln.at/en/danube/roman/roman-museum>

	<p>(<i>Salzturm</i>) and fan tower embedded in the landscape' area, preserved and secured foundation walls of the right gate of <i>Porta principalis dextra</i> fort, Roman inscriptions,</p> <ul style="list-style-type: none"> • Roman military force stationed at the site: <i>Ala I Commagenorum, Equites Promoti, Lanciarii Comaginenses, Classis Commaginensis, Foederati</i> 	<p>streets today as the Rom-ans did.</p> <ul style="list-style-type: none"> • Collaboration with a local restaurant serving an original multi-course meal once a month (and on request) prepared according to recipes of the Roman <i>epicure Apicius</i>.
<p>Bononia / Regional Historical Museum of Vidin⁹³ - Bulgaria</p>	<ul style="list-style-type: none"> • Town history museum considered as one of the oldest scientific and cultural institutions in Vidin. • The museum and the pilot site are open for access to Public, • Known remaining archaeological finds: Foundation of the western Gate of ancient Bononia with 5m depth, considered as the city's main entrance during the Roman Age, and as the starting point of the "<i>Decumanus Maximus</i>" route, Ruins of a decagonal fortress tower with diameter 25 m, the bronze head of Emperor <i>Trajan</i>. • At 27 km south-east, the remains of Ratsiaria are located with a unique floor mosaic found in a suburban villa. At 13 km south-west is the village of Sinagovtsi with the new Roman remains and discoveries. • Roman military force stationed at the site: <i>Cohors I Cisipadensium</i>. 	<ul style="list-style-type: none"> • The different historical phases of Vidin are displayed through structured departments: Archaeology, Numismatics, Ethnography, Bulgarian Lands XV-XIX centuries, Modern and Recent History. • Large collection of stone plastic art decorating Roman sarcophagi, tomb stones and votive tablets, statues. • Antique collections of pottery, clay lamps, jewelry, household articles, Roman coins. • A library with over 4600 volumes is open for experts and citizens. • Bilingual Guiding books of the city and the fortress are offered in the museum. • The medieval Bulgarian fortress, BabaVida, which is built on top of the foundations of the Roman fortress Bononia, is a well-preserved monument which overlooks the Danube River and is considered as one of the must-see attractions in the area, and hosts various cultural activities such as theatrical performances, concerts, film shooting.
<p>Ad Labores - Kopačevo: Osijek Archaeological Museum + Visitor center Kopački Rit -Croatia</p>	<ul style="list-style-type: none"> • Considered as the biggest and central archaeological museum in its region and a must visit attraction for history enthusiasts. • It has a distinctive structure with a Moorish-Venetian style watchtower and arcades on the ground. 	<ul style="list-style-type: none"> • The museum exhibits and conserve most of the finds from the pilot site, displays artifacts from the Stone age to the 16th Century with a large collection of Roman stone relics including

⁹³ <http://museum-vidin.domino.bg/eng/index2.htm>

	<ul style="list-style-type: none"> • Located in the old baroque core of the city surrounded by other iconic buildings and museums, namely the museum of Slavonia. • The pilot site is located at a walking distance from the famous nature park Kopački rit. • Known remaining archaeological finds: Walls of a late Roman fort detected by geophysical survey in 2011. Parts of the sewerage system are excavated and backfilled. 	<ul style="list-style-type: none"> • a Celtic helmet forming the star exhibits. • Group and guided tours are available for visitors at the museum. • A library with more than 70000 books is located at the museum of Slavonia. • In cooperation with the museum of Slavonia and other institutions, the archaeological museum is collecting all types of resources regarding the Croatian Limes, including satellite images, results of geophysical surveys, archaeological excavations, archive material and photographic documentation, maps with locations. • The findings of these documented resources are published in form of scientific articles and papers. • The nature park Kopački Rit offers a wide range of interactive activities to visitors, including boat and cycling tours, educational programs, multimedia exhibitions.
<p>Am Vorderen Schloßbuck : Archaeological Museum Gunzenhausen - Germany⁹⁴</p>	<ul style="list-style-type: none"> • The museum is a unique presentation of the historical cultural landscape of Franconia. • With its 4 floors structure, the museum displays exhibitions on the pre-history and early history of the city and surrounding area of Gunzenhausen from the Stone Age, the Bronze Age, the Urnfield Age, the Iron Age and the Hallstatt Age are presented. • As far as the Roman period is concerned, the museum exhibitions focus not only on the Roman Limes but also on Roman everyday life, the Mithras sanctuary. • Besides its physical structure, the museum offers a virtual tour experience for the permanent exhibition. • Known remaining archaeological finds: remains of the stone tower Limes-wall: stone remains near the tower forming the 	<ul style="list-style-type: none"> • A strategy game is available on the museum website, offering the users a playful and pedagogical tool to learn about the world of archeology and to discover the remnants of the Roman civilization. Through the game, the user gets to play with the museum's items, discover and reveal them by solving correct questions. The game is also suitable for teaching in schools.

⁹⁴ <https://www.museen-in-bayern.de/museums-in-bavaria/museums/museen//archaeologisches-museum-gunzenhausen.html?L=1&cHash=ae815213d5ae2b46274a1f4255268984>

	grounding structure. Small fort where its foundation area is visible.	
Matrica -Museum and Archaeological Park in Százhalombatta ⁹⁵ - Hungary	<ul style="list-style-type: none"> Established in a former mansion and within a single undivided space, the museum presents to its visitors the local long history of the city of Százhalombatta from Ice age until the 19th century. Objects which were found or gathered from the city are exhibited in the museum. Exhibition themes narrates the life stories of people in feasts, camps, field works, etc. Temporary exhibitions are held presenting the work of local artists and presents their works. All museum' objects are presented in the form of a digital catalogue accessible on tablets and are available for visitors to browse and locate them. The tablets offer the possibility to also discover the non-exhibited artifacts of the museum' collection due to the absence of space. Known remaining archaeological finds: the remains of the Roman Bath, Auxiliary fort, military vicus, section of the Limes Road, Roman cemetery. Roman military force stationed at the site: Cohort I Lusitanorum, Cohort I Alpinorum. 	<ul style="list-style-type: none"> Assembling a puzzle, shaking a clay rattle, sorting artefacts, comparing cloth's pins, finding and recognizing objects hidden in the wall, are among the available tools interactive games in the museums helping visitors learning history. A treasure hunt game is available on the tablets which are offered to visitors on entrance. When the game is over, the treasure is unveiled to the user in 3D form. An education hall is available to visitors and schools and serve as a space for craft activities, museum pedagogical lessons, performer nights, smaller conferences, political-free forums and mini camps.
Sacidava - "Axiopolis" Museum in Cernavodă ⁹⁶ - Romania	<ul style="list-style-type: none"> Located in a historical building, the museum was renovated to accommodate 4 exhibitions rooms, 2 floor towers, and 2 halls. In Cernavoda, many roman inscriptions were discovered namely the inscription of the three martyrs Chindeas, Cyril and Dasius, dating from the fourth century. Some of the other rare and unique finds discovered in Cernavoda and exhibited in the museum are <i>The Thinker and the Sitting Woman</i> terracotta statues, presenting the only Hamangia figurines discovered with heads on and the oldest sculpture depicting human cognition and introspection. Known remaining archaeological finds: East and West gates, several defense towers. Roman military force stationed at the site: Cohors I Cilicum, Legio V Macedonica, Legio XI Claudia, Cuneus equitum Scutariorum. 	<ul style="list-style-type: none"> Artefacts, tombs and other bronze and iron objects from the early Neolithic to the Roman and Byzantine age are exhibited in the halls. Visitors can also explore the importance of Axiopolis/Cernavoda as a religious center of Schytia Minor (today Romania and Bulgaria).
Ledarata/Ram: National Museum	<ul style="list-style-type: none"> A museum of a complex type with its seven historical buildings, is considered as the 	<ul style="list-style-type: none"> With its complex type and through its connected

⁹⁵ <https://matricamuzeum.hu/en/>

⁹⁶ <https://audiotravelguide.ro/en/axiopolis-museum-from-cernavoda/>

<p>Požarevac - Serbia⁹⁷</p>	<p>second oldest museum where over 50000 archaeological, historical, ethnographical and art objects from different eras are housed in.</p> <ul style="list-style-type: none"> • For more than a century, the museum was preserving extremely rich and diverse cultural and historical heritage of the Braničevo district. • Artifacts from the excavations of Viminacium occupy a special place in the museum's permanent exhibition such as: a pen CALAMUS used for everyday writing on Roman wax boards, a Viminacium coat of arms made of marble, a standing woman figure of the Viminacium personification, Roman and Venice gold coins, Alexander of Macedonia's gold coin, sarcophaguses, sculptures, Požarevac peace medals. • A lapidarium is set out in the courtyard of the museum where it exhibits sculptures, tombstones, sarcophagi, and pieces of architectural plastic. • Known remaining archaeological finds: Ditches and ramparts, Towers, gates, cemeteries, Settlement of a fortress. • Roman military force stationed at the site: Legio VII Claudia, Cohors I Cretum, Cohors II Hispanorum, Ala II Pannoniorum, Cuneus Equitum Sagittariorum, Milites Vincentienses. 	<p>buildings, the museum offers a wide range of interactive learning tools such as:</p> <ul style="list-style-type: none"> • The ethnic park on Tulba hill, considered as an outdoor museum, has two houses from the area of Mlava river depicting the evolution of folk architecture in the city. • The peace Tent was set up at the place where the treaty Peace of Požarevac was signed between the Turkish empire and the Austro-Hungarian and Venetian republics, and displays a permanent exhibition, in the form of a replay scene with masked dolls dressed in the style of the 18th century sitting around a table and negotiating, to preserve the memory of this historical event. • A virtual tour of the different exhibitions of the museum are available online.
<p>IŽA - Danube Region Museum in Komárno - Slovakia⁹⁸</p>	<ul style="list-style-type: none"> • Located in the historical building of the palace of culture, the museum is considered as the most important centers of the Hungarian culture in Slovakia with its 5 historical buildings where it hosts 6 permanent exhibitions and conserves more than 130,000 objects. • A valuable collection of the fine arts from the 18th century to the beginning of the 20th century is housed in the ceremonial hall. • A permanent exhibition shows the historical development of Komárno and its surroundings from the prehistoric age until 1849 and the ethnography of the region. • The museum hosts the richest Roman collection in the country, located in the south rondella of the rebuilt Bastion VI where is displayed the "Roman Lapidary" exposition 	<ul style="list-style-type: none"> • One of the specialized tasks of the museum is the research and documentation of Roman remnants in the Komárno district. • Presentations, master classes and lectures on archeology, art history and botany are often organized in the museum with the collaboration of local experts and researchers.

⁹⁷ <https://museu.ms/museum/details/236>

⁹⁸ <http://muzeumkn.sk/index.php?cat=12&page=article>

	<p>with carved stone monuments dating back to the 2 – 4 century AD.</p> <ul style="list-style-type: none">• Known remaining archaeological finds: Sections of two V-shaped ditches from the fortification of the first earth-and-timber fort in the north. From its inner area in the south are known partly the remnants of 11 military barracks. <p>The outer fortification included 5 V-shaped ditches from various periods of the fort's existence. From the inner area are known the headquarters, barracks, stables, stores, granaries, and baths.</p>	
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3. Strong and Interconnected Museum Cluster

Desislava Mincheva-Yordanova and Nouha Ben Salem (NTC BG Guide)

3.1. Positioning of the Museum Cluster

The first step in positioning the (Living) Danube Limes Museum Cluster is to develop a clear understanding of what the museums stand for and what they offer. This can be done by creating a clear mission statement and vision for the cluster. This should be based on the specific goals and objectives of the cluster and should be well-articulated and communicated to stakeholders. The second step is to identify the target audience of the cluster. This could be local communities, tourists, academics, or any other group that would benefit from the cluster's activities. The primary target audience should be identified, and the cluster's activities should be tailored to appeal to this primary audience. Next, the cluster should develop a marketing strategy to ensure its visibility and reach its target audience. This should involve the use of traditional media such as print and radio, as well as digital and social media. Online promotion and engagement should be used to reach out to potential visitors and encourage them to visit the museums.

Finally, the cluster should consider its location in relation to its target audience and the potential for increased tourism. The cluster should be located in areas that are easily accessible to its target audience, and that offer potential for increased tourism. This could include cities with a high concentration of tourist attractions, or areas that are already popular with tourists. The positioning of the Danube Limes Museum Cluster is essential to its success, and careful consideration should be given to all of the above steps. By positioning the cluster correctly, it can ensure that it is seen as a valuable part of the Danube region's cultural heritage and can provide maximum benefit to its stakeholders.

One of the tools that is used to assess a competitive position and to develop strategic planning is the SWOT analysis. It evaluates internal and external factors, as well as current and future potential. Based on the results of the conducted research and surveys, we had identified below the realistic Strengths, Weaknesses, Opportunities, and Threats for the development of the Danube Limes Museum Cluster, thus highlighting the advantages and disadvantages. One of the most important strengths for the positioning of the DLMC is that it offers a unique and diverse cultural heritage with a variety of museums, each of them being able to have its own identity, but also to be part of a large-scale network.

Table 5: SWOT Analysis of the Danube Limes Museum Cluster

(NTC BG Guide)

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • Unique and diverse cultural heritage • Strategical position of the museums on the banks of the Danube. • Danube limes classified as World Heritage Sites. • Communicating common visions and values. • Telling the right story of the Danube Limes Region. • A rich and diversified history, heritage, and landscape. • Raising awareness about the connected heritage sites. • Establishment of a coherent museum brand / quality label. • Existing Knowledge, Experience, and Technologies. • Willing of the participants countries to engage the communities. • Common promotion and marketing. 	<ul style="list-style-type: none"> • Large disproportions in missions, structure, industries of the members and partners within the same country and in the region (size, number of exhibits, economic strength, and visitors' attendance). • The uneven level of innovation and performance between the east and west countries of the Danube region. • Considerable geographical distance. • Language barrier. • Lack of financial substantiality. • Dependence on public Authorities. • Seasonality of visits and events. • No common platforms to communicate information on history, prices, events, monuments. 	<ul style="list-style-type: none"> • Unifying the diversity under a common brand. • Existing of Transnational Clustering structures and policies in other sectors. • The development of clusters is firmly supported by EU Strategy for the Danube Region (EUDSR)'s action plan. • Mediatize all in one Danube Destination. • Creating of a museum cluster by sharing of common vision and values. • Existence of Volunteering network. • Support from International Institutions to follow a common strategy for managing a World Heritage Site. • Exchange of best practices in communication and history interpretation. • Introducing of new technologies in order to increase the integrated tourists' interaction. • Involvement of local communities and reenactment groups. 	<ul style="list-style-type: none"> • A museum might lose its individuality; Some members may become dependent on the cluster ideas for development. • The complexity of the Danube Museum clustering approach as it will be the first on its own in the region and in Europe. • The uncertain level of closeness and trust between members and partners. • The uncertain continuation of engagement and involvement of participants after the end of the Living Danube Limes project. • Differences in needs and expectations of members, partners. • The instability and disproportion of the performance of the cultural heritage and tourism sector in the region.

3.2. Mission, vision, objectives

3.2.1. Mission and vision

The mission of the Danube Limes Museum Cluster is to upgrade and enhance the unique image of the Danube Limes as a destination, the universal value of the common Roman heritage, to increase the sustainable development of the socio-economic potential of the Danube region. Its vision is to be among the well-recognized museum networks and representative of Limes heritage in the Danube region.

Joining the Danube Limes Museum Cluster (DLMC) will give the opportunity to its members to:

- Find, connect, and collaborate with other cluster members, to create a dynamic exchange of best practices, to share and receive know-how and expertise and to improve and sustain their activities.
- Use the network database, to look for funding and financial support, as the multitude of events, structures and offers would attract opportunities for projects, sponsors, etc.
- Use the Living Danube Limes application and the web-based platform to promote their organizations, offers, news, discoveries, events, and attract more visitors to their structures and to the heritage places.
- Integrate the Danube Region cultural route and influence decision making, policies and actions required for the development of sustainable tourism solutions within the Danube Limes Region; etc.

Its main objective is to tell the story of the Danube Limes Region and to facilitate the cohesion and joint appearance of its members for the promotion of the common Roman heritage and the Danube Limes.

3.2.2. Strategic Objectives

Strategic Objective 1: to create synergies between all museums, visitor centers and tourist centers located along the Danube.

Strategic Objective 2: to connect the identified cultural heritage sites, Roman museums, visitor centers and tourist centers, under one common brand and one common cultural route via the use and the maintenance of the Living Danube Limes application.

Strategic Objective 3: to promote the unique value of the common Roman heritage and the Roman Danube Limes toward the local and international communities.

Strategic Objective 4: to receive the support and involvement of the concerned stakeholders and local communities in the protection, promotion, interpretation of the common Roman heritage and in the development of cultural, touristic, and socio-economical activities in the concerned areas.

3.3. Stages of development

The legal form of the cluster could be institutionalised or non-institutionalised, each of them having advantages and disadvantages. The agreement between members on the type of the cluster should consider the geographical scale on which the cluster will operate, the required legislation under which the proposal of such collaboration will be submitted, the applicable regulations at international level, etc. In the case of the (Living) Danube Limes Museum Cluster the most two significant stages of establishment and further development may be considered.

3.3.1. Stage 1: Autonomous network

As a first step of the first stage in the establishment of the Danube Limes Museum Cluster and within the framework of the Living Danube Limes project, a Museum Cluster Charter will be created and accepted by its Coordinator and designated National Points of Contact.

The Charter aims at the establishment and/or strengthening of a sustainable network of museums, visitor centers and tourist information centers and other eligible organizations along the Danube with reference to the Roman heritage and especially the heritage of the Danube Limes. This will enhance not only the local value of the individual sites but also improve their visibility in the international chain of Roman museums and visitor sites along the Danube as well as in the whole area of the former Roman Empire (reaching from Great Britain in the north to Tunisia in the South and to the Middle East).

It defines the main scope of cooperation and potential members at the first stage of the museum cluster establishment. In a short-term it might be modified, aiming to include further members. The Charter at this stage foresees that:

- Danube Limes Museum Cluster (DLMC) represents an autonomous network of Museums and/or Visitor Centers and/or Tourist Information Centers and/or other organizations/institutions located within a 50-km distance from the Danube Region with a focus on the Roman and/or Late antiquity heritage.
- DLMC will promote the characterization and the outstanding universal value of the Danube Region with special focus on the Roman Limes sites.
- DLMC is not a legal entity and does not have own legal personality different from its Members.
- The participation in DLMC is on voluntary basis. Each of the Members preserves its independency and legal status and may terminate its participation at DLMC at any time under the terms and procedure of this Charter.

In a long-term and upon agreement between the PoC's and/or the Members, DLMC could be institutionalized, provided that all legal requirements and formalities thereto are in place.

The charter serves to recognise the importance of all joint activities and resources that have been achieved within the Living Danube Limes project. It sets the conditions of participation in the DLMC, the general and specific principles concerning the functioning of the cluster, the rights, and obligations of all potential participants, etc.

The acceptance of this Charter represents an important point in the development of a transnational tourist destination valorising the Roman Heritage along the Danube through a Transnational Network of Stakeholders.

The Cluster Coordinator will record and administer all the DLMC members and activities, supported by the National Points of Contact. National Points of contact” or “PoCs” are institutions/organisations nominated by a relevant Living Danube Limes project partner to coordinate at national level the museum cluster.

National Points of Contact will invite museum cluster members and will coordinate at national level their collaboration within the network. This will strengthen the museum clusters at national level, being part of an international cluster network.

The next step of the first stage of establishment of the (Living) Danube Limes Museum Cluster will lead to expanding the type of members, by also including research and education institutions, re-enactment groups, galleries, etc. having activities and/or scope related to the Roman heritage. In this way the cluster will cover the other supporting and related industries and will further strengthen the appearance of the network on the international stage.

3.3.2. Stage 2: Institutionalization process

The idea of an institutionalised museum cluster is gaining traction in recent years to bring together multiple museums, galleries, and other cultural spaces under a single, unified umbrella. This type of museum cluster has the potential to create a number of benefits for the local and wider community. The most obvious benefit of an institutionalised museum cluster is that it provides a platform for the development of collaborations between different institutions. By bringing the various members together, the cluster provides a unique opportunity for these organisations to explore ways of working together. This could involve sharing resources and expertise, co-curating exhibitions, or even partnering in research projects. An institutionalised museum cluster can also provide a platform for the development of educational initiatives. This could involve providing educational programmes to the local community, or hosting events such as lectures, workshops, knowledge transfers, living history events, etc. This would not only help to foster a greater appreciation of art and culture in the local area but could also help to encourage the development of a more educated and engaged population. Furthermore, an institutionalised museum cluster could also provide a boost to the local economy. By bringing together multiple cultural spaces, the cluster could attract more visitors to the relevant region, which in turn could lead to increased footfall in the local shops, restaurants, and other businesses. This could help to create jobs, as well as providing an additional source of income for the community. Finally, an institutionalised museum cluster has the potential to provide a platform for the development of innovative cultural projects. This could involve the development of virtual reality exhibitions, or interactive installations. It could also involve the use of digital technology to create new and innovative ways of engaging with the cultural heritage of the area. In sum, an institutionalised museum cluster has the potential to provide a range of benefits for the local and wider community. From promoting collaborations between different institutions, to providing a platform for educational initiatives, to boosting the local economy, an institutionalised museum cluster could be an invaluable addition to any city or region.

Living Danube Limes

A cluster may take different institutional form. The appropriate institutional form for the (Living) Danube Limes Museum Cluster may be adopted based on the common identified needs and goals. For example, an association could be one of the most appropriate forms for an institutionalised cluster.

An association is an institutionalized type of museum cluster, and its advantages are numerous for both its members and visitors to the museum cluster network. An association is an organization that brings together museums with a common goal or interest. One of the main purposes of the institutionalized cluster as an association could be to increase the visibility of its members, to foster collaboration among them, and to provide support in areas such as funding and marketing. For the members of an association, the benefits are clear. Associations provide a platform for museums to come together and share resources and ideas. They can also act as a lobbying group, providing a unified voice to advocate for the interests of its members. Associations can also facilitate the development of joint projects, such as exhibitions and educational programs, as well as providing a forum for networking. The benefits for visitors are also significant. Associations can organize events and activities that bring together multiple museums, allowing visitors to experience different collections and exhibitions in one visit.

Furthermore, associations can help to promote the members' activities to a wider audience, thus increasing footfall and revenue. In addition to the tangible benefits, associations can also help to create a sense of a community among their members. Through collaboration and discussion, associations foster a spirit of cooperation and mutual understanding among museums, while also creating a platform for the exchange of ideas and best practices. In conclusion, associations are an important part of the museum landscape, providing numerous benefits for both members and visitors. They help to strengthen and promote the individual museums that form their membership, while also creating a sense of community and collaboration. In this way, associations are a powerful way of bringing people together and creating a vibrant museum culture. And in a long-term having the (Living) Danube Limes Museum Cluster registered as an association will only bring further benefits to the members, to the visitors, to the local communities, to the economies, to the Roman heritage by keeping it alive and vivid.

3.4. Tools for connecting the Danube Region

The Living Danube Limes project provides the tourism and heritage sector stakeholders with new means and tools to reach the vision to encourage a common connection between all countries along the Danube Region, using the shared Roman Danube Limes heritage. The most important of these are:

3.4.1. Roman lusoria “Danuvina Alacris”

The Lusoria has been reconstructed as faithfully as possible to the late Celto-Roman construction method. Using oak and spruce, and Roman building materials which were specifically designed and crafted for this purpose, the ship is fully functional. It can board up to 26 rowers and 2 captains. It

weighs 6 tonnes and has a length of 18m and a width of 2.8m. its normal speed is between 6 and 9 km/ hour and can reach up to 13km/h.

The Roman ship replica is considered as the centre piece of the project, since it linked to the Danube region countries with a connecting cruise, travelling down the Danube and stopping at the pilot sites.

As part of the connecting cruise, Living Danube Limes Project partners, together with their associated museums, hosted the ship on different stations along the Danube where it was welcomed with living history festivals, re-enactment activities at the pilot site, and installation of visibility measures. Groups of rowers from all countries (and continents) had volunteered to row the ship on its Connecting cruise 2022.

The ship was the magnet for attracting tourists and for enhancing the development of a sustainable tourism in remote areas together with the development of a cultural route that will drive tourists to these heritage spots. The reconstruction with original Roman methods gives the ship and thus the project and its connecting elements the necessary authenticity as an integral part of the Roman Danube Limes region. The Connecting Cruise 2022 enhanced the visibility of the Danube Limes in 8 countries located along the Danube (Germany, Austria, Slovakia, Hungary, Croatia, Serbia, Bulgaria and Romania) and connected the local communities and the Roman heritage in a unique way.

3.4.2. Virtual Reality Reconstructions

To provide a digital holistic vision of the Roman Danube region and to bring a new dimension to the visiting experience of the Limes heritage along the Danube, each pilot site had a Virtual reality reconstruction representing mainly large-scale visualisation of the sites in their original shape and state, thus presenting the viewers something which is not visible onsite. The 3D models represent buildings and fortifications and are presented to the viewer by virtual panoramic 360° tours observable by various devices such as mobile phones, tablets, and PCs.

All these 3D models are included in the Virtual Reality (VR) reconstructions application, called VR Living Danube Limes app, and were converted to QR codes which can be scanned by mobile phones directly on the sites and visitors may visualize the specific panoramic model of the pilot site offline within the app.

3.4.3. Danube Limes Cultural Route

The Danube Limes Cultural Route will be based on the connecting cruise trip initiated by the Lusoria and on its different stops and connected heritage places that rowers visited during the cruise.

The new cultural route will bring additional visibility to the tourist potential of Roman heritage sites in the region, placing them on the tourist destination map. It will foster eco-friendly and sustainable tourism, the protection of the tangible cultural heritage sites as well as economic and cultural development in the entire Danube Region.

The main objective will also enhance and support the ongoing process of nominating the Danube Limes as UNESCO World Heritage site, which in turn will be an integral part and driving force for the protection of the Frontiers of the Roman Empire as a whole.

3.4.4. (Living) Danube Limes Brand

The (Living) Danube Limes Brand is a visual identity of the project which will be used as a marketing affiliation allowing tourism and heritage stakeholders to increase the visibility of their institutions.

Branding the (Living) Danube Limes Museum Cluster means to create and adopt a brand identity and personality allowing its members, namely museums and visitor centres to stand out and to attract new visitors. The Museum Cluster brand, being focused on the Roman Danube Limes, gives its participants a unique advantage to show a distinctive offer from competitors.

The role of tourist information centres and related tourism institutions is particularly important as well as for the successful branding of the Museum Cluster, as they represent the first point of contacts of external visitors to the destination.

The (Living) Danube Limes Museum Cluster branding could be built using the following components:

- Diversity and rich history and landscape from the natural and historical features of each pilot site region.
- Authentic and exclusive products and experiences offered by Danube Limes Museum Cluster members (museums / VCs / TICs).
- Existing branding structures from already established networks in the Danube region, such as the Austrian Danube Limes Network or the German Limes Road Association.
- Unique assets offered by the Living Danube Limes project: Living Danube Limes application, VR reconstructions of the Limes sites, the lusoria “Danuvina Alacris”, Living history events, Limes cultural route.

3.5. Consolidation Tools

Based on the results from the conducted by National Tourism Cluster “Bulgarian Guide” and the Living Danube Limes project partners survey among the potential cluster members, some of the identified benefits from participating in a Danube Limes Museum Cluster could lead to an increased number of visitors, a better visibility of the museums and their activities, opportunities for developing new offers and new attractive activities for visitors, etc.

The collaboration and consolidation forms could be summarized, as follows:

3.5.1 Knowledge Transfer and Mobility

Investing in its human capital is one of the efficient tools for the Danube museums, tourist, and information centres to thrive through the industrial transition they are facing and to adapt and

diversify their operating models. The tourism and heritage sector are known to be multidisciplinary fields, with specialized technical workforce, reinforced by volunteers or freelancers. Sharing their specialized knowledge with their external environment could provide these institutions with the opportunity to transform its know-how into best practices and which can be recognized and applied with broader audiences.

Continuous improvement of the skills and knowledge of the staff is another element for improving the museum performance and for gaining and maintaining a competitive advantage. This could depend on the technical and financial capacities of each institution and would require effective seeking of partners which will benefit from such cooperation as well.

3.5.2 Marketing and Promotion

Promotion and marketing are very needed tools especially for the less-known museums, visitor centres and tourist information centres. The affiliation to the (Living) Danube Limes common brand and the Danube Limes Cultural Route would increase the visibility of all pilot sites and raise the profile of the associated museums to reach out for new visitors. By including the Brand in their media campaigns, members will have the opportunity to raise the profile of their institutions and to reinforce their communication strategies. Through a thoughtful use of social media tools matched with the Living Danube Limes application and the web-based platform, the members will promote their organizations, offers, news, discoveries, and events, and will attract more visitors to their structures and to the heritage places, hence guarantying a wider recognition and popularity.

3.5.3 Innovation and Research

Each of the identified history museum and visitor centre hold a unique collection of artefacts and exhibitions, possess unique stories on the Danube culture and history while having unique geographical and historical location.

These differences embody the strength of the DLMC and the richness of the resources that may provide inspiration for the development of new and exclusive exhibitions, tours, research, narratives, and other outcomes which could enforce the Danube destination image. Such cooperation may generate creative approaches, such as digitalization and gamification, to bring to life the underused collections.

In this sense, the DLMC will act as a support network to establish new contact and partnership between members along the Lower Danube, generally less experienced in digitalization of cultural heritage than the museums in Upper Danube. Cooperation could be framed in terms of acquiring new technological equipment but most important would be to equip the staff with the specific skills to develop and communicate innovative digital products and content.

3.5.4 Cross-sectoral Cooperation

Museums are widely recognized by the academic community to better preserve and socialize their items and intangible heritage when they create cross-sectoral cooperation schemes outside of their immediate networks (Tanackovic & Badurina, 2009). The example of Golubac, a medieval fortress in

Serbia, provides a valuable insight of how the cooperation between different sectors regarding the activities of museums, visitor and tourist information centres works. By the initiative of the central government and the National Agency for Spatial Planning of Serbia, an analysis of the potential of the renewed site was made and the cooperation between various stakeholders created a very popular site in 2-3 years (Antonic & Djukic, 2018).

Thus, the first level of cross-sectoral cooperation should be envisioned with the authorities. As most of the reviewed museums, visitor centres and tourist information centres are local, that cooperation should be sought and occurring on municipal level. The heritage institutions are dependent on local public budgets, but at the same time, their increased activity will reintroduce back more via attendance fees and increased tax revenues.

At last, cooperation will be sought in the wider GLAM sector (galleries, libraries, archives, and museums). For example, the socialization efforts of the museums, visitor centres and tourist information centres will require the presentation of artefacts from those institutions which show the change of the interpretation of the Roman past in the past and modern times. Within the culture and creative sector, the museums also play a role, as already revised, in establishing and developing a local brand, which is done in close cooperation with the local designers, content creators, artist and writers (Fei & Chen, 2019).

4. Impact of the Danube Limes Museum Cluster

Desislava Mincheva-Yordanova, Nouha Ben Salem and Veselin Vasilev (NTC BG Guide)

Despite being geographically distant from each other and operating under different internal structures, industries and authorities, the identified Museums, tourist, and visitor centres with their respective partners form the components of a tourist circle and complement each other. They bring benefits to the same target groups: the local communities and visitors, and the international communities and tourists.

Through the creation of the (Living) Danube Limes Museum Cluster, visitors will move between the ports to discover the heritage sites, scan QR codes, follow suggestions from the Living Danube Limes App, pass to tourist centres for specific information on facilities, enter museums, visit the Lusoria (if it is located nearby), buy souvenirs from local craftsmen and shops, go to local restaurants and hotels. All members are already connected by the final products and services they offer to their target groups; thus, it is very essential to create synergies and combine efforts to work more closely and efficiently.

The creation of the (Living) Danube Limes Museum Cluster as a cooperative network between historical museums, visitor and tourist centres would upgrade their traditional roles of collecting, exposing, and informing to become dynamic game changers in the local and national economic and social development.

Through such a cooperation, the Roman Danube Limes will be transformed into a valorised common heritage asset where each local knowledge and culture is unique, thus requiring more preservation,

Living Danube Limes

protection, and promotion. The exchange of best practices and the enhancement of the skills of the workforces within the DLMC would help to channel new sources of fundings and boost local investment to support the tourism infrastructure.

The effects of the DLMC on the local and regional level could be presented in several directions. A probable projection is that the touristic activities will increase the local employment, encourage the local business, and further provide more income for the local authorities through taxes.

The effects on the local economy could be summarized in 4 basic categories (Gustafsson, 2017):

- Rent, maintenance, utilities connected to the premises of the buildings and the plots that the museums, visitor centres and tourist information centres use.
- Salaries and other costs for personnel
- Specialized supplies such as different equipment
- Services such as bid writing project management, publishing, catering, event management etc.

The development of a Danube Limes Museum Cluster (DLMC) is essential to ensure that its impact on history and culture is properly documented and preserved. Further benefits of the development of the Cluster may be summarised in four key categories:

- **Education:** The museum cluster will provide an invaluable educational resource, as it will allow people to learn more about the Roman Empire and its impact on European history in all Danube countries. The museum cluster will provide an interactive and engaging experience, which will help to bring the history of Roman Danube Limes to life.
- **Preservation:** The development of DLMC will be beneficial in terms of preservation, as it will help to protect the archaeological sites and artefacts that are associated with the limes. This will ensure that these important pieces of history are preserved for future generations.
- **Tourism:** The development of a DLMC will also be beneficial for the local economy, as it will provide a great tourist attraction. By creating a museum cluster, it will be easier for people to access the sites and artefacts associated with the Roman Danube Limes (especially when they are part of the Living Danube Limes application) and it will also create more job opportunities in the local area.
- **Cultural Exchange:** By creating a DLMC, it will provide an opportunity for cultural exchange between countries. Visitors from different countries will be able to come together and share their knowledge and experiences of the Roman Empire and its impact on European history.

In a nutshell, museums are hubs for innovation and creativity and with the transnational dimension that the (Living) Danube Limes Museum Cluster is offering, the members would tap into each other resources to create new exhibitions, tours, research, living history events, or any other joint product or service which eventually would have a positive impact on the relevant local communities and on the relevant urban area.

Living Danube Limes

The (Living) Danube Limes Museum Cluster is established first as an autonomous network to raise awareness of this important part of the European history and to preserve the archaeological remains of the limes. The cluster will consist initially of museums, each of them with its own unique focus, with a different theme and range of exhibits. These museums will be working together to create an international network of research and education to further promote the study of the Danube Limes.

In this way, the (Living) Danube Limes Museum Cluster will become an important part of Europe's cultural heritage and an invaluable source of knowledge about the past. Located along the Danube River, the museum cluster will include museums, tourist, and information centers (in a short-term) spanning almost all Danube River countries (in a long-term). The members will be contributing to the preservation of the area's cultural heritage and to the understanding of the Danube Limes. The cluster is also helping to create a network of research and education around the topic of the Danube Limes (in a long-term), which is an important part of the European history.

Conclusion

Desislava Mincheva-Yordanova (NTC BG Guide)

The (Living) Danube Limes Museum Cluster Strategy provides a holistic approach to the preservation and promotion of the Danube Limes, while also providing a platform for collaboration and integration of the various stakeholders involved. Through its combination of research, education, public outreach, and stakeholder collaboration, the current document is set to become an invaluable asset in the preservation and promotion of this unique cultural and historical heritage. By providing a platform for a comprehensive, collective approach to preservation, the strategy will ensure that the Danube Limes will remain a part of our collective cultural history for years to come.

Because a transnational (Living) Danube Limes Museum Cluster has an important role for preserving the cultural heritage of the Danube region. It will serve as a bridge between the past and the present, connecting countries and cultures in the area, by expanding and offering visitors the opportunity to learn more about the rich history of the Danube. The Cluster will foster the cooperation between the various cultural heritage actors along the Roman Danube Limes. This cooperation would strengthen the sustainable use of the cultural heritage in the Danube region. The sustainability would enhance the capabilities of those heritage museums and institutions while further making them resilient towards the challenges in the tourism and cultural sectors.

The desk research conducted by the Living Danube Limes project partners on the national and macro-regional conditions for the creation of the Danube Limes Museum Cluster, as well as the surveys conducted by National Tourism Cluster “Bulgarian Guide” amongst its potential members, led to several conclusions.

The most important one is that the (Living) Danube Limes Museum Cluster has the potential to become a major attraction for tourists along the Danube (initially in partner countries) and support the prosperity of cultural and educational opportunities in the Danube region. Such a cluster will be an example of how museums can work together at a transnational level to create a vibrant and interconnected cultural network.

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