Integrated spa development strategy for spas situated in the area along the main highway traffic route crossing the Hungarian-Serbian border region

Cooling Cubes project

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- Municipal Government of Ada
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You don’t need any sign.  
You’ve been allowed to see your place-  
Behold, you are free!

Item

Just be outside – be the master of your days-,  
And be concerned for, protect you delight.

Zoltán Szűgyi: Pillangóversek (Butterfly poems)

1. Introduction

The sense of freedom is a valued treasure for all of us. IPA’s Cooling Cubes project Cross-Border Cooperation Program (HUSRB/1203/213/155) is organized around the sense of freedom.

To discover and utilize the healing effects of waters, to return the freedom of health to those suffering from temporary or prolonged health problems are noble goals. To provide the experience of wellness to broad masses of people by constructing spas, pools, saunas and slides and to develop a touristic product from it, which gives the experience of freedom, doesn’t just mean an experience, but also excess income, broadening knowledge, new professions and new jobs.

The two regions, the South Great-Plain in Hungary and Vojvodina in Serbia constitute a territory blessed with such natural endowments, where under the ecologically valuable natural streams of water, a geothermic fortune unparalleled on our Continent is hidden. These natural values should be made accessible to the local population living there as well as to all those who are interested.
In the two regions a large number of medicinal-water healthcare institutions, wellness spas and spas operate. The developments are often isolated, the spas know little about each other and they mostly just consider their own development. Every spa considers the entire population as their targeted market. While even spa guests aren’t aware of their freedom of choice either, the culture of conscious medicinal-water and water usage hasn’t evolved. Beside introversion, the fact that on the two sides of the border different supply levels have been established, results in further problems. Contrary to the conscious development strategy in Hungary, in Serbia developments have fallen behind by decades, therefore Hungarian spas are able to provide more modern services.

While the supply level is different, the demand side is similar both in Serbia and Hungary. Spa guests living in Vojvodina are willing to travel great distances to visit a Hungarian spa.

The two regions are connected by the E/75 international highway corridor, many people who travel on it desire this pleasant sensation of freedom, the sensation of getting refreshed. The experience of a healing or refreshing spa for a shorter or longer duration.

Every condition is given for these two regions to plan jointly in their own interest and the interest of their environment. To be able to freely shape the future, beside our own material and intellectual resources, we should take advantage of the subsidies of the European Union. Let’s shape this sensation that can’t be sensed anywhere else in the world, which is tied to the usage of the spas in the South Great-Plains and Vojvodina, that experience of freedom, which will mean the Cooling Cubes brand with the assistance of the project.
2. Managers’ summary

The Cooling Cubes project was realized with the support of the Hungary-Serbia IPA Cross-Border Cooperation program with the identification number HUSRB/1203/213/155, with the leadership of the University of Szeged and the partnership of the municipal government of Mórahalom, the municipal government of Ada, the Temerin Development Agency and the Bácska Regional Development Agency.

The Cooling Cubes project set three fundamental objectives for itself:

To increase the tertiary sector’s economic and employment role in the midst of the slowing economic development and decreasing employment of the project’s action area, the South Great-Plain and Vojvodina. The exploitation of the two regions’ shared geothermal assets, according to the viewpoints of modern requirements and sustainability, in healing and in the development of the wellness culture.

To increase the role of medicinal and natural waters in the establishment of the preconditions of a new lifestyle that includes active spa usage, and to shape it into a touristic product along the E/75 highway.

In the course of the planning program we studied 34 medicinal and wellness spas as well as outdoor pool facilities in the South Great-Plain and Vojvodina from the points of view of tourism, energetics, operational and development policies, and we discussed their analysis at the project’s workshops.

We established that the term spa has a different meaning in the two countries, the concept of spa is interpreted by its narrower meaning in Serbia, while in Hungary it’s interpreted in a broader sense. The facilities situated in the two countries possess almost
identical natural endowments. Geothermal endowments are favorable both in the South Great-Plain region and in Vojvodina. The different social and economic environment as well as the completely divergent development policies and developments of previous years fundamentally determine the current situation and future potentials of spas, medicinal complexes. In 2012, approximately 750,000 to 800,000 guests visited the 13 spas and medical hospital in Serbia which were studied in more detail, while 2,300,000 to 2,400,000 guests visited the 15 facilities in Hungary which were studied in more detail.

It can be generally stated that as a result of the developments of recent years the largest Hungarian spas have been striving to satisfy various guest demands. In Hungary, in the past 15 years, calculated from the first Széchényi Plan until now approximately HUF 100 billion’s worth of spa developments have been realized by health and attraction development projects, with the assistance of European Union and Hungarian resources. As a result of this the annual price revenue of the sector has increased four folds, it currently stands around HUF 50 billion, of which HUF 20 billion enriches the state’s budget. On the Serbian side, in the absence of EU subsidies the modernization of spas, the broadening of their services didn’t occur, ownership relations haven’t been favorable for developments either. At the same time, on the demand side the guests in the South Great-Plain and in Vojvodina expressed nearly identical expectations, as a consequence of this the number of Serbian visitors to Hungarian spas has been continuously growing.

The conditions of profitable operations still need to be improved a lot in both countries. A portion of Hungarian spas have been caught in a debt spiral because of the developments, and the facilities constructed without sufficient professional concept are struggling with operational difficulties. At the same, time it’s also
evident that in the case of sufficient situation assessment and more rational operational frameworks both traditional and fast developing spa facilities can be profitable (such as Kiskunmajsa, Mórahalom). In Serbia the conditions of profitable operations are even less present, the facilities are obsolete, their operations are expensive and wasteful in the case of facilities in public ownership, they possess little data and information in relation to operations and turnover.

In the profitable operation of spas, beside the quality of the staff, water and energy systems have emphasized importance. Some facilities have constructed geothermal heating systems, by the means of which the public institutions of the municipality are also provided with the advantages of thermal energy generated by thermal water.

Future developments are largely dependent on the facilities’ own financial resources, credit rating, as well as accessible financial resources. From the point of view of the South Great-Plain European Union resources have a larger significance, while Vojvodina can primarily rely on the resources of the central provincial large investment project fund, the available pre-joining funds and the opportunities of the European Regional Cooperation (ETE; IPA programs).

The majority of the Cooling Cubes project’s proposals don’t necessitate excess resources, we focused on enhancing the uniformity and tender participation capacity potentials of the Cooling Cubes region. In the framework of this we propose the following:

• **The integration of the traffic system**, the uniform management of medicinal and wellness spas
• The operation of an **information system**, the expansion of measurability
• The modernization of the **social security**, and doctor’s recommendation systems
• Making the **ownership structure** more transparent, the formation of a more investment friendly environment

• **Cost efficiency and operational safety** (hydro-machinery, energetics)

• Ensuring environmental and economic sustainability in the process of design and operation

• **Institutionalization** (Theoretical Methodological Center, Practical Methodological Center, the creation of a uniform image – the CC brand)

• **Networking** (the development, harmonization of existing clusters, establishment of a TDM organization)

• The exploitation of **collective knowledge**, let’s build on the knowledge of those who emigrated from the region

• **Civic connections** – the formation of spa users’ organizations, the involvement of existing ones

• The integration of the Cooling Cubes project into **development documents** (national, regional, county, municipal)

• **Concentration of development resources**

Therefore, in Hungary, the **expansion of the range of medicinal services is proposed**. In the cases of Kiskunmajsa and Mórahalom, their classification as **medicinal facilities**, and the ensuing **public purpose developments** are justified.

In Serbia, as a result of ownership relations the determination of development directions is more questionable, in the case of municipal ownership the increasing of water surface and complex spa reconstructions may play the principal role. The condition of medicinal hospitals makes immediate reconstruction necessary. In the case of operational spas, the objective may be human resource development, marketing development, as well as balneological purpose research and development in the case of the
largest facilities. Private capital may establish brand new spas in both countries. There seems to be a higher probability of this in Serbia, along the river Tisza (along the Palics-Magyarkanizsa-Zenta-Ada-Óbecse-Temerin line), and in the Zombor, Apatin and Bezdán triangle.

The proposed measures have three such components that require institutionalization by project members. These may be new institutions, but much rather the expansion of the existing institutions’ role, the spreading of their partnership networks.

- *Theoretical Methodological Center* – The preservation, processing of the information gathered by the project, the preparation of methodological proposals.
- *Practical Methodological Center* – The training of practical experts connected to spa culture, quality assurance of the training process.
- *The creation of a Cooling Cubes brand*, the development and formation of a marketing image for the purpose of the maintenance of tender participation capacity.

According to this, the establishment of a CC Body of the representatives of the owners, operators and users of spas in the action area of the project in a 1/3 -1/3 -1/3 ratio. The body is a community body, but its functioning and tender participation necessitates a permanent manager.
3. Methodology

3.1 The methods applied in the course of the study’s preparation

As the foundation of our study we reviewed the related professional literature. We examined what has characterized health tourism in general during the recent period, and how the situation of the facilities, located in the surveyed area, has developed, changed. While collecting relevant professional literature we examined the results originating from the past 2 to 3 years.

We conducted field research. In the process of the research we applied qualitative field study methods and questionnaire studies. In the course of the qualitative field research first we conducted a field survey at the spas, and we observed spa guests in Vojvodina. Thus, we performed research at the spas of 5 municipalities in Vojvodina: Ada, Apatin, Óbecse (Bečej), Petrőc (Bački Petrovac) and Temerin, between July 8th and 12th, 2013.

Beside the questionnaire studies, we prepared interviews with spa operators. In the process of the partially structured interviews (6 interviews), with each interviewee the conversation included, how they see the current situation of the spa, its role in the lives of the municipality and local residents, if they have specific goals, a vision for the future and development opportunities.

In parallel with this, with the assistance of our project partners, we forwarded questionnaires which related to the turnover, financial and technical parameters of the spas.

With the assistance of our Cooling Cubes project partners a detailed review was conducted at the spas of Mórahalom, Ada, Temerin and Óbecse. We integrated the observations of these into our material as well.
The work-process was supplemented by experiences at workshops, consultations and conferences.

4. The strategy’s objective

4.1 Fundamental objective

The Cooling Cubes project sets three fundamental objectives for itself:

- To increase the tertiary sector’s economic and employment role in the midst of the slowing economic development and decreasing employment of the project’s action area, the South Great-Plain and Vojvodina, according to the characteristics of the post-industrial development.
- The exploitation of the two regions’ shared geothermic assets, according to the viewpoints of modern requirements and sustainability, in healing and in the development of wellness culture.
- To increase the role of medicinal and natural waters in the establishment of the preconditions of a new lifestyle that includes active spa usage, and to shape it into a touristic product.

According to this, it considers the following to be its tasks:

- A more coordinated development of the spas connected to the South Great-Plain and Vojvodina action area, compared to today.
- The coordination of the development strategy of the medicinal and wellness culture
• Increasing touristic opportunities in the two regions, establishing the necessary cooperation techniques
• The maintenance of a contact network between Cooling Cubes spas, planning and operating institutions and their experts, the creation of the ability to obtain tenders
• Nurturing good neighborly relations between the Serbian and Hungarian peoples

4.2 The objective of spa development

Health tourism is an increasingly popular touristic product, the characteristic scenes of which are medicinal spas, adventure and open air water parks. International touristic trends contribute to the popularity of health tourism, specifically the increasing participation of elderly people and the progressive gaining ground of a more health-conscious lifestyle. As a result of this, in several countries where the natural endowments make it possible, this opportunity has been recognized, and they place great emphasis on the development of health tourism and spas. A good example for this is Hungary, where in the 2000s considerable sums were spent on the development of spas and connected touristic products. As a result of this, the supply side of health tourism significantly changed, which is on the one hand characterized by the quantity of available services, but primarily by their quality.
From a health tourism point of view Vojvodina has endowments similar to those of the South Great-Plain region of Hungary, however, the potential which exists there is yet extraordinarily unutilized. Even though its thermal waters are of medicinal water
quality, because of the relatively high investment cost of well-drilling, these subsurface resources are yet unexploited. Even though, because of the large number positive effects of tourism – for example economic stimulation – it would be worth utilizing this potential in the region. Therefore, spa development doesn’t emerge as an objective for these regions, rather as an instrument for the commencement of further development processes.

The aim of this chapter is to provide a comprehensive view about what kind of opportunities are promised for the Serbian-Hungarian border region in the area of tourism development, and especially spa development.

4.2.1 Global touristic trends influencing the developments

Tourism plays an increasingly determining role in the lives of modern societies, since this is the principal form of spending free time. Exactly for this reason, it would be important to build on this continuously strengthening sector in the municipalities of the South Great-Plain and Vojvodina, by utilizing existing potential, since the positive social and economic effects of tourism influence a number of areas, not just on the national or regional, but also on the municipal level. As the foundation of conscious touristic developments, first of all we have to be aware of the role of tourism in the world economy and the processes moving the sector, global trends, which are presented by this sub-chapter.

Tourism is one of the most dynamically developing sectors of the world economy. According to the data of the United Nations World Tourism Organization (UNWTO), in 1950 the number of international tourist arrivals was 25.3 million persons, while in 2012 it reached 1 billion 35 million persons, and the revenue of
international tourism reached 837 billion Euros. Europe’s role is traditionally significant in world tourism, since it gives almost half of the global revenue with 356 billion Euros (UNWTO 2013). The motivations of tourism have, of course, changed significantly though the years, but even currently relaxation, rest and recreation are in the first place, with a 52 % share. (Figure 2) This is followed by visiting friends and relatives; travel motivated by religion and health make up 27 %, while travel for business and professional purposes 14 %. This trend is favorable for spa cities, since they can attract all the travelers who are motivated by relaxation, vacationing and health preservation.

An important component of global demand trends is that the participation of elderly people in tourism is rapidly growing. In connection with this, the demand for comfort and security is increasing as well as the demand for comfortable forms of travel. After

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1 http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_highlights13_en_hr.pdf
having examined touristic mobility, it can be stated that the usage of passenger cars is continuously growing, exactly because of its above mentioned comfort and flexibility. The municipalities participating in the project may take advantage of this as well, since they are situated in a location well-accessible by passenger cars, along the Budapest-Belgrade traffic route, in a 50 km broad stripe along it. Tourism both directly and indirectly contributes to the spatial trend of transportation demand.

It’s also an observable tendency that there is a more powerful demand for more restful relaxation, the demand for personally tailored, individual products is also growing. Since elderly people rather travel outside of the high season, because they don’t like crowds and free time is always available to them, the growing participation of elderly people in tourism has a seasonality reducing effect. A consequence of all of these is that in marketing less emphasis should be placed on age and more on comfort. Health consciousness as an international trend is observable in the case of a growing number of people, they prefer to travel to places, which serve the preservation or improvement of health. Even though it’s generally observable that in the past decades people’s average free time has diminished, their purchasing power has increased, therefore they are willing (and able) to spend larger sums of money to improve the condition of their health. Beside this factor, active tourism attracts an increasing number of people, the share of wellness and medicinal hotels is also continuously growing.

Beside global trends it’s worth examining the narrower vicinity of the region. The difficulty is caused by the fact that while according to the classification of the United Nations World Tourism Organization Hungary belongs in the Central-Eastern European region, Serbia is classified in the Southern European region. But such a separation of the Serbian-Hungarian border region would
be excessive, the territory of Vojvodina rather resembles the Central-Eastern European region from an economic, social point of view (as well as considering its natural endowments). In any case, it’s true for both regions that after the democratic transformation the interest for these territories significantly increased, which would be worth exploiting for Hungary as well as for Serbia. Even in this way, in 2012, considering international tourist travel Hungary’s share within Europe was only 1.9 % (the number of tourist arrivals exceeded 10 million here), while the share of Serbia was a mere 0.2 % (the number of tourist arrivals didn’t even reach 1 million). However, the trend is encouraging, according to which tourist travel to Serbia was 6 % higher compared to the previous year, in this respect Hungary was lagging behind with a 1 % growth compared to the year 2011 (UNWTO 2013)².

In connection with supply it can be stated that it is increasingly becoming consumer oriented, which results in the improvement of the quality and variety of tourist product supply. The supply of spas can also only compete on the increasingly saturated market by conforming to consumer demand, with high-quality services. This is the reason why the detailed analysis and survey prior to development projects, included in the objectives of this present strategy, is so important. These studies have to take into consideration not just the specific possibilities, but demand as well, if they intend to remain permanently competitive in the sector.

4.2.2 The possible effects of touristic (spa) developments

Tourism has a number of positive effects on a specific municipality and its narrower and broader vicinity, therefore a lot of people

² http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_highlights13_en_hr.pdf
view it as one of the break-out points of municipal and regional development.

The development of tourism may bring a considerable amount of revenue for both the municipal and state governments, however, in the interest of this significant investments are necessary, such as infrastructural improvement. Tourism may have beneficial effects on economic structure, because it induces further developments and also contributes to the welfare of the local population. Exactly for this reason, Hungarian economic policies consider tourism as a success sector, since it serves the achievement of several objectives, among other things it creates jobs, improves the budget’s balance and it also has a regional development effect.

Spending by tourists is directly proportional to the duration of their stay, the quality and quantity of available services, thus for the achievement of beneficial effects the appropriate formation of touristic products is crucially important. From among the positive economic effects, the multiplying effect of tourism is outstanding: the revenue originating from tourism circulating in the economy creates further direct and indirect revenue. The thus created revenue can be consciously recycled into the development of other sectors. In the present case, this may mean either the development of services directly connected to spas, but even the improvement of the municipality’s appearance, making it more attractive (such as park establishment, renovations).

For the service providers, the higher price level during the tourist season is also a beneficial effect, however, the longer the tourist season is, the less the prices need to be increased, which in turn is attractive to tourists. This is why it’s profitable to develop services, which reduce seasonality and are available in the winter as well as in the summer, which can be achieved by the wintertime operation of spas and the expansion of services.
The positive social-cultural effects of tourism, beside the fact that they are evident in the improvement of the living standards of those who are affected, may cause beneficial changes in employment distribution and the organization of the community. The fundamental motivation of many tourists is to get acquainted with other societies and their cultures, therefore in the objective-system of tourism development, it’s a fundamental objective that the municipality should be outstanding with a characteristic appearance in the touristic product supply. Beside this, the increasing of the local population’s identity consciousness is also an objective, so the municipality’s natural and cultural values will be explored and preserved in a tourist-centric manner. The most significant tourism development tasks: further displaying of touristic attractions; the improvement of the infrastructure; taking touristic points of view into consideration in municipal construction planning; the development of touristic program packages; active tourism organization; the improvement of connected services; training of human resources; cooperation with interested organizations; tourism marketing; improvement of financial conditions.

4.2.3. The opportunities inherent in the development of tourism

Within tourism, the touristic product that can be most closely connected to spas is health tourism. Currently spa tourism is one of the fastest growing branches of health tourism, and in general, interest for medicinal and wellness tourism – collectively referred to as health tourism – is continuously growing worldwide. This chapter intends to introduce what advantages health tourism development may entail, and what exploitable endowments the surveyed region has in this respect.
Even the term health tourism itself is used in a variety of narrower or broader interpretations by experts. In Hungary the concept of health tourism became popularly known in the framework of the Tourism Development Program of the first Széchényi Plan, and in most cases to this day this collective term is applied, which in reality consists of two parts: medicinal tourism and wellness tourism (Michalkó 2012). Specifically, because in Hungary the majority of spas perform both functions, however, in Vojvodina these two types are more separated. Moreover, in Serbia we may experience a kind of shortfall in the area of wellness and adventure spas, rather open air pools and medicinal spas, medicinal centers form a larger separate category.

It’s obvious from its name that health tourism is based on various health factors, which in the case of spas means a variety of thermal waters with medicinal effects. The beneficial health effects of thermal waters with the appropriate mineral content have been recognized for centuries, and their popularity has been growing to this day. The thermal water endowments of the Hungarian-Serbian border region are significant even in worldwide comparison. A great number of studies arrived to the conclusion that considering reserves, Hungary possesses the most significant subsurface thermal water supply and geothermal energy potential in Europe. This, of course affects Serbia’s border region as well, since in the Pannon-basin – which includes the mentioned region – the Earth’s crust is very thin, the average geothermic-gradient is one and a half times the global average. Even within this, exactly the affected territories (the South Great-Plains region and Vojvodina) possess one of the best endowments, specifically, the temperature of subsurface waters is the highest here (Figure 2). As a result of this, the high temperature subsurface waters – the temperature of which
exceeds 30°C are referred to as thermal waters – can be produced from a smaller depth in the region.

Figure 3: Heat-flow density in the Pannon-basin and in its vicinity
Source: http://geophysics.elte.hu/atlas/geodin_atlas.htm

The other branch of health tourism, wellness tourism, can be considered a kind of anteroom of health tourism, in this case the aim is not healing, rather the prevention of illness and the preservation of health. Erfurt-Cooper – Cooper (2009) establishes that in the last decade of the 20th century, wellness facilities and programs became considerable tourist attractions worldwide, moreover according to forecasts their popularity will increase further.

It’s also worth exploiting the natural endowments of the region, which are favorable from the point of view of health tourism, because from among the above mentioned tourism trends, several
changes have a favorable effect on it. Specifically, the observable
dynamic growth in health touristic travels from the beginning of
the 2000s is also a result of the fact that health preservation is
becoming an increasingly important motivation. The fact that peo-
ple over the age of fifty – who constitute the primary target group
for medicinal vacations - are showing an increasing willingness to
travel. The increasing participation of elderly people in tourism is
important, since according to forecasts, by 2050 in Europe – in one
of the largest recipient and sender regions of tourism – the propor-
tion of people over the age of 60 will reach 40 % of the population.
The international trends, according to which health consciousness
is increasing and the demand for more restful recreation is grow-
ing, also have a favorable influence on health tourism.

It’s not just health tourism on which external processes have a
positive effect, rather health tourism also has a positive effect on
the many weaknesses observable in tourism. Such weakness is,
for example, – which can be considered a general problem in the
sector – seasonality and the short duration of stay. Health tourism
exerts a favorable effect on these, since medicinal treatments are
available in every period of the year, moreover, those who desire
to be healed are characterized by a longer duration of stay and
higher spending. It may play an important role in regional decen-
tralization, since taking advantage of the above mentioned favora-
ble endowments, such locations may become tourist destination
areas, where otherwise no other attraction is available, and in the
case of the realization of this it may also have a stimulating effect
on domestic tourism.
4.2.4. Economic development

The positive effects of tourism development, implemented with conscious planning, can most effectively be measured by the amount of money spent by tourists. In Hungary’s case the revenues directly originating from tourism account for 4.2% of GDP, but their share combined with indirect revenues is 10.8% (WTTC 2013a)\(^3\). In the case of Serbia only 1.6% of GDP originates directly from tourism, and even considering the indirect revenues this proportion is just 5.8% (WTTC 2013b)\(^4\).

The multiplying effect of the upsurge of tourism should absolutely be emphasized, meaning that the revenues originating from tourism, further circulating in the economy create further direct and indirect revenues (Dávid L. et al. 2003; Lamperth J. 2011).

Since in the sectors which focus on services, regional development and touristic development are significantly interconnected, it’s worth emphasizing what kind of advantages touristic investment projects have from the point of view of regional development. Touristic development projects generate further development in the region, they increase the welfare of residents and the region’s population retaining power. But tourism can be not only an instrument of regional development, it can also be a profit, since by the various infrastructural developments, municipality rehabilitations, the region’s attractiveness also further grows. Therefore, municipality development is some kind of a necessary precondition of tourism, exactly for this reason, in municipal development programs tourism is often classified as one of the most important priorities from the point of view of regional development. The positive effects of developments for local people are observable not

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4.2.5. Employment

The positive economic effects of tourism are also evident in employment, since we are talking about a job creating sector. Tourism is an employment intensive sector, it requires human resources, even in spite of the spreading of modern technologies. (Michalkó G. 2012).

Thus, the positive effect of tourism development is also evident in the employment market. In Hungary 5.8 % of employees work directly connected to tourism (considering the indirectly employed people this share is 9.8 %, approximately 360 thousand persons) (WTTC 2013a). Currently in Serbia the tourism sector only provides jobs directly to 1.5 % of employees, and even indirectly only 5.5 % of employees work in connection with tourism (WTTC 2013b).

The number of people directly employed by spas in Hungary: 8,500 persons, the number of those who are affected in an indirect manner is estimated to be 25 thousand.

It’s evident from the numbers that the significance and economic role of tourism isn’t equal on the two sides of the border, but by passing on experience and by cooperation considerable changes can be commenced.

4.2.6. Real estate development

The market value of real estates in a specific municipality or region is more significantly influenced by their location, than their physical
value, the employment and touristic values of the given municipality. Despite the high bank interest rates of recent years, renting out real estate has still proven to be a profitable activity. The real estate owners of municipalities near spa cities have taken advantage of this as well. This is evident from the price of the real estates that have been sold.

<table>
<thead>
<tr>
<th>Municipality's name</th>
<th>Average price of real estate sold in the municipality</th>
<th>The difference in comparison with the average price of real estate sold in other municipalities of the county %</th>
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<tr>
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<td>Municipality</td>
<td>Average Price</td>
<td>Real Estate Price</td>
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</tr>
<tr>
<td>MÓRAHALOM</td>
<td>179 407</td>
<td>152,0</td>
</tr>
</tbody>
</table>

**Figure 4 Average real estate prices in municipalities with spas**

Source: edited by Schwertner, J. (2013) based on information from NAV- OTP Mortgage

In the overwhelming majority of municipalities with spas the average real estate price is higher, than the average price of real estate sold in the other municipalities of the county. This is particularly significant, if we are aware of the fact that 40% of real estate sales within the county occur in towns with county rank.

In summary, from what is describe above we can understand that as a result of international tourism trends there would be sufficient demand for spa development, and what is indispensable: the surveyed region possesses the suitable natural endowments. In Hungary the recognition of this fact started earlier, therefore by transferring experience, and by cooperation the health tourism of the border region can be developed in a complex manner, which could assist the region in getting connected into the tourism market even more intensely.

### 5. General situation description

The realization of cross-border projects naturally imply that we are talking about the combined examination of two different areas,
which can be spotted in a number types of data, indicators, let’s just consider the EU resources available to Hungary, which currently Serbia can only partially gain access to. Beside this, of course, the border may mean other economic, political, social and cultural differences, but we wish to emphasize that the two regions possess an extraordinary number of common features. These common features (endowments) should absolutely be taken into consideration and can be utilized in the process of subsequent developments, the interdependence of the two regions is most evident in the case of touristic developments.

Taking a closer look, the spas included in the survey, on the Hungarian side in the South Great-Plain region, while in Serbia in Vojvodina, are situated in the immediate vicinity of the M5 and E75 highways. Exactly for this reason, in the following chapter we present a brief general overview of the two regions’ natural endowments, as well as their social-economic, travel-geographic characteristics and not the least importantly their touristic potentials.

The South Great-Plain region comprises Békés, Csongrád and Bács-Kiskun counties, however, because of their distance from the M5 highway the spas of Békés county were not included in the survey, irrespective of this the general characteristics of the region are presented together. The territory of the region is 18,339 km2, it accounts for approximately 20% of Hungary, this is the country’s largest region. Despite this, it includes only 254 municipalities, it possesses the least dense municipality network in the country. The agricultural characteristics of the region are well indicated by the fact that 85% of its territory is arable land and a considerable portion of this is involved in agricultural production. The region’s population is approximately 1 million 350 thousand persons. The Vojvodina Autonomous Province with a similar territory (21,506 km2) has approximately 2 million inhabitants. Geographically this
region can be divided into 3 areas: Szerémség, Bánát and Bácska. 84% of the total land area is involved in agricultural production, therefore Vojvodina is deservedly called the food-pantry of Serbia. Administratively there are seven separate districts in Vojvodina, which include a total of 45 municipalities. The 45 municipalities count a total of 467 settlements, of which 52 settlements have city like characteristics.

5.1 Natural endowments

The surveyed area means the region along the Serbian-Hungarian border, the majority of which is an uninterrupted area the culture of the Great-Plain involved in agricultural production. It’s obvious from this that the determining component of the area’s geography is flatland, and the river Tisza had a decisive role in the formation of the area. At this point such a common characteristic, endowment already emerges, which creates a similar situation in the two regions, specifically the powerful dominance and significance of agriculture. The good quality of the soil contributed to the fact that traditionally in the economic structure agriculture has played a prominent role in the two regions, however, the objective of the present strategy – among other thing – is to shed light on the fact that these areas are worth developing from a touristic point of view as well. On the large flatland only two hills rise on the Serbian side: Fruska Gora (Tarcal-mountains) and Vrsac planine (Verseci-mountains), on the slopes of which, taking advantage of favorable climate conditions vineyards and orchard are located. This is characteristic of the Hungarian side as well, since the South Great-Plain region is where the number of hours of sunshine is the highest, 3 significant wine-regions are situated in the region.
Beside geographical endowments the two most significant and determining rivers of the region are worth mentioning, the river Danube and the river Tisza. Even though the 2 rivers rather constitute the West-East borders of the area surveyed by the present study, their significance can be emphasized both from the economic and touristic points of view. Beside surface waters, the region possesses considerable subsurface thermal water reserves as well. This is a result of its favorable location – already mentioned in the first chapter of the study – and its basin characteristics, which constitute the significant foundation of touristic developments.

5.2. Society

In the South Great-Plain region the population has diminished by one hundred thousand, and both in total numbers and proportionally Békés county has suffered the greatest reduction. The employment ratio is around 48% in all three counties, there are slight differences in respect to unemployment. In Csongrád county the unemployment rate is more favorable than nationwide, however, in Bács-Kiskun county it’s roughly identical with it (it’s higher in Békés county). In the case of the chronic unemployment rate a similar regional distribution can be observed. The distribution of population according to educational level is also more favorable in Csongrád county, but municipalities show a considerable shortfall both in regional and national comparison. From the point of view of income, the region also
performs below the national average, but undeclared incomes are significant, particularly in Bács-Kiskun county\(^5\).

26% of the population of Serbia lives in Vojvodina, of this ethnic Serbs are in an absolute majority in 31 municipalities and in the city of Újvidék. The Hungarian population is the most populous minority. According to the last census, in 2011 253,899 Hungarians lived in Serbia, of whom 99% resided in Vojvodina. On a nationwide level they constitute 3.53% of the total population, while on the regional level this number is 13%, but their number diminishes year after year. The overwhelming majority of the population is concentrated in the province’s cities, but the agricultural population is still present in sub-regions. The indicator of the number of municipalities per 100 km\(^2\) is 2.2 in the case of Vojvodina (in the Duna-Körös-Maros-Tisza Euro-region this indicator is 2.8); contrary to this in the South Great-Plain it’s only 1.3 to 1.4 (less dense municipality network). The age distribution of the population of both the South Great-Plain and Vojvodina is showing an aging tendency. The number of school-aged children is diminishing, the number of the more elderly population is rising. The future effects of the aging population, similarly to most European countries, is forecasting future demographic problems. In 2003, a negative natural population growth was registered in all of the municipalities of Vojvodina. The age distribution of the population: aged 14 and under 15.9%, aged 15 to 60 62.3%, over age 60 21.4% (0.4% is unknown). The active population is 912,800 persons, 44.9% of the total population. 20.13% of the total population has its own income (408,999 persons). The number of supported people

\(^5\) MKIK Economy and Business Research Institute (2013): Social-economic profiles of Hungary’s regions
is 706,843, meaning 34.8% of the total population. In the case of the distribution of the active population by age groups, the workforce between the ages of 30 and 39 is the most massive (32%), they are followed by the age group between 40 and 49 (25.2%). In Hungary the share of the age group between 15 and 29 is considerably higher among those who are employed: practically in every county it’s 30 percent or higher, at the same time in Vojvodina it doesn’t even reach 20%. Considering the distribution among sectors, the most significant participation rate is in the product processing industry: 26.05%, this approaches the rate of the Hungarian counties in the region (27% to 35%). The proportion of those employed in agriculture (wild game management, forestry, fishing industry) is still distinctly high, approximately 23%, in Hungary this number is below 10%. In Vojvodina the proportion of those employed in commerce is significant, they are followed by those employed in transportation, storage, postal service, telecommunication, and the construction industry. Barely 1/5 of employees work in the public sector (public administration, education, healthcare).

During the 90s as a consequence of the closeness of the war and the risk of war, on the territory of Greater-Yugoslavia migration considerably changed the ethnic and social composition of the population. Because of the risk to residents a massive and swift flood of refugees started within the country and to abroad as well (primarily to Hungary) – which again illustrates the interdependence and common roots of the two countries. At the end of the 20th century, the preceding events and the results of the bombings lead to an even larger scale emigration. It’s an unfavorable phenomenon that the educational level of those who are temporarily employed abroad is higher than that of those employed in Serbia. The proportions of the active, supported and the income
possessing but not active population points out the economic problems. Both in all of Serbia and in Vojvodina the low proportion of the active population is characteristic, the high number of residents who aren’t employed – searching for jobs –, which also originates from economic problems, are the greatest obstacle to the improvement of living standards. The development of tourism may be an instrument in the region for the improvement of the employment structure, the number of employed residents and the quality of life.

5.3. Economy

From an economic point of view the South Great-Plain region is in a disadvantaged situation within the Hungary, in 2010 less than 9% of the national GDP was produced in the region, and the value of the per capita GDP was approximately HUF 1.7 million, which is only two thirds of the national average. The lagging of the South Great-Plain from the development level of the county is continuously growing, during the period of the Yugoslav wars, the region wasn’t included in the classic investment wave because of its closeness to the war zone. The consequences of this fact influence the South Great-Plain in a negative way to this day. The overwhelming majority of companies operating in Vojvodina are involved in the trade sector. Corporate companies operating in agriculture and in industry are also significant. Similar tendencies can be observed in the South Great-Plain region as well, where until the most recent times in the economic structure crisis sectors were predominant (agriculture, light-industry), industry sectors were struggling with overproduction (food-production industry), and sub-sectors which were producing distinctively for the local market, and the industrial
and service activities which induce dynamic development weren’t present on a sufficient level. It should be mentioned, however that in the economic structure of both regions the hospitality industry and tourism would deserve a larger emphasis, since the necessary natural endowments and cultural traditions are present. Aspirations in this direction in the South Great-Plain region have shown powerful development in the past decade, however, stimulation for this hasn’t happened in Vojvodina yet. Therefore in Vojvodina this economic sector – perhaps because of the underdevelopment of services – hasn’t been able to display considerable development until now. In the areas in Vojvodina, in the composition of gross added value, industry participates to the largest percentage (34%), along with the more loosely interpreted agriculture with 29%. The construction industry isn’t significant (4%). The service sector (tertiary sector) is relatively underdeveloped, in the case of services the gross added value is rather low in comparison with the region – approximately 33%, which considerably lags behind, for example, Csongrád county’s 62%6.

5.4. Transportation

From a transportation geographical point of view neither region is outstanding, however, a highway passes through the areas, the utilization of which may be determining not just from an economic but also from a touristic viewpoint, since accessibility, easy transportation is always an important component in the motivation of tourists.

6 Homokhát Eurointegráció Nonprofit Közhasznú Kft. (2011): Agricultural-development operative program (HU-SRB)
The accessibility situation of the South Great-Plain is fundamentally influenced by the route of the M5 freeway, the continuation of which in Vojvodina is the E75 freeway. The route is a significant section of Europe’s international highway system as the Helsinki corridor marked as IV. and X/B. The pan-European corridor marked as X/B, connects Budapest to Belgrade, therefore it represents outstanding significance from the region’s point of view (Figure 1). The highway system of the Trans-European Network (TEN), has by now become known as a fundamental concept of regional development on a continental scale. The trans-European transportation network provides an exit route from the core territory of the EU through Central-Eastern-Europe to the sea-ports of the Adriatic Sea and the Southern-Balkans and a connection to the Middle-East. The highway/railway accesses marked X with the route Vienna-Budapest-Szeged-Szabadka-Belgrade-Nis-Thessaloniki/Istambul, which goes through the region, and the number 8 large river transportation corridor with the route Rhine-Maina-Danube-Black Sea, which relies on the region, both of which have a great economic significance provide a comparative geopolitical advantage of prime significance.

Beside the connection with Western-Europe, the significance of the freeways in the case of both regions is the fact that they establish the most modern highway connection toward the central regions of each county (Budapest, Belgrade).
On the South Great-Plain the delay of freeway constructions and of the development of the backbone railway networks has damaged/is damaging the region’s economic competition positions, and the opportunities of exploiting the favorable logistic situation. Currently waterway transportation is not yet exploited in either the South Great-Plain or the Vojvodina region. One of the causes of economic and social development differences within regions is the prolonged existence of differences observable in accessibility. This affects the Vojvodina side in an even more pronounced manner, where fundamentally the entire road system is in need of development, not only the highways and railways. The peripheral situation of the South Great-Plain region from a transportation geographical point of view impairs the region’s chance of catching
up economically. However, by coordinating interregional, regional and local infrastructural development interests and by the cooperation of joint partners the development of the infrastructure may induce (multiplier) further positive effects.

<table>
<thead>
<tr>
<th>Facility’s designation</th>
<th>Distance form M5 freeway (km)</th>
<th>Distance from M5 freeway (minutes)</th>
<th>Designation of the nearest road</th>
<th>Distance categories from M5 freeway (5: nearest; 1: most distant)</th>
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</thead>
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Table 1: The distance of facilities from the E-75 (M5 and A2) freeways

Source: edited by AQUAPROFIT Co., based on Google map’s data

We also took the presence of highways into consideration while determining the spas that should be involved in the project, since one of the important pillars of joint development and cooperation is fast and easy accessibility.
5.5. Tourism

The most significant touristic values of both the South Great-Plain region and Vojvodina are tied to their natural endowments, such are the before emphasized thermal and medicinal waters, the territories divided by great rivers, and environmental preservation areas. The rare, protected fauna of the flood zones of rivers favors eco-tourism, while the river itself favors water sport lovers and those who desire active recreation. There are 3 national parks operating in the South Great-Plain region (Körös-Maros NP, Kiskunsági NP, Duna-Dráva NP), the number of scenery preservation districts is 8, and 13% of Hungary’s environmental preservation areas are situated in this region. In Vojvodina there is one national park (Fruska Gora NP), there are 6 environmental preservation areas and 3 nature-parks On the Serbian side, beside nature-excursions, and water as well as active tourism connected to the rivers, fishing and hunting tourism are also very significant, they have great traditions in the region.

The high number of sunny hours favors grape and fruit cultivation. The vineyards with great histories may attract a significant number of people interested in wine tourism. Beside this, gastro tourism closely connected to good quality wines is also significant, there is a lot to love in the food and drinks on both sides of the border.

The cultural endowments of the two regions are also outstanding, a particular example of which on the Hungarian side may be, for example, Ópusztaszer, with the Historical Memorial Park, while on the Serbian side the several hundred years old monasteries. There are excellent buildings of the unique architectural style, secessionism that is characteristic of Central-Europe on both sides of the border. The cultural attractiveness is further enhanced by events,
festivals, which already possess great traditions on the Hungarian side, but an increasing number of festivals are also organized in Vojvodina.

Still from among the touristic products provided by the region the most outstanding may be health tourism built on the already mentioned favorable thermal water endowments. Thermal waters are not only outstanding in the region because of their temperature, but also by their mineral content composition, most possess medicinal properties, therefore not just adventure and wellness tourism may be founded on them, but also health tourism. The region possesses several significant spas with great histories (such as Szeged, Apatin, Kanizsa), but increasing demand in recent years and development policies (most notably on the Hungarian side) have facilitated the emergence and popularity of a few new destinations (such as Móráhalom, Bački Petrovac). On the two regions’ territory more than 30 thermal and medicinal spas are situated.

Therefore, in summary it can be stated that the region possesses good endowments in the area of health tourism development, moreover there is a potential for offering other touristic products, as a result of which a more complex range of products may be available to tourists arriving here. This has several advantages, firstly it may arouse the interest of a broader circle of people, secondly it may increase the duration of stay, which will increase the services used and the amount of spending.

6. General survey – Spa supply components

In the course of the analysis we determined that the surveyed facilities situated in the two countries possess almost identical natural endowments. Both in the Hungarian South Great-Plain region
and in Vojvodina geothermal endowments are favorable. The current situation and future potentials are fundamentally determined by the partially different social and economic environment, the completely divergent development policies and developments of previous years.

6.1. Ownership relations

From among the spas of Serbia Petroland Aquapark is privately owned, the medicinal spas, hospitals are in state ownership. The majority of the surveyed facilities, however, are owned by municipalities. Of the more than 92 thousand corporations in Serbia, mostly public corporations and those which are in state ownership suffer the greatest losses, this fact has an influence on spas as well. In Hungary more than 90% of spas are in municipal ownership.

6.2. Energetics

The energy utilization of the surveyed spas shows a mixed picture. A significant portion of them don’t pay sufficient attention to the reduction of their costs. The problem of spas in Vojvodina is the incomplete subsidy system, which hinders energetic investments. On the contrary in the spas of the South Great-Plain several energy efficiency investment projects have occurred with the assistance of EU tender resources. A portion of the development projects were programs realized within the spas, another portion involved heating system modernizations coordinated among public institutions. (Csongrád, Mórahalom and Makó). The facilities possess sufficient water reserves, and the amount of water produced covers the spas’
own needs. A group of spas are technically insufficiently equipped and operate with low efficiency. The water and building support machine equipment are in need of replacement or renovation.

6.3. Salary costs, employee background

In the case of spas salary cost is the most considerable cost component, about 40% to 50% of the total expenses.

![Figure 6: The estimated average number of employees in the surveyed spas (2011-2012)](source)

*Source: data request forms and ceginfo.hu*

In general the number of employees is higher in those spas, where a variety of services are available and some type of medical treatment activity is also performed (Mórahalom, Anna Fürdő, Makó, Kecskemét, Magyarkanizsa etc.). Beside salaries, energy expenses constitute a significant part of costs (about 25% to 35%). Marketing expenses are low, they stay under 1% since the
municipally owned spas in Hungary exert their marketing activity through TDM-organizations.

Considering ticket revenues, the revenue of the largest facility of the region, the one in Mórahalom reaches approximately one third of the combined revenues of the largest spas in Hungary. The revenues originating from ticket sales of the surveyed facilities in Serbia are about one magnitude lower than at the Hungarian ones.

A portion of the surveyed spas – partly because of the number of guests, partly as a consequence of unfavorable management, partly as a result of the high loan installment payments (in Hungary) – aren’t capable of producing profit, they obtain the financial resources necessary for their operation from contributions by the local municipalities.

Considering the system of services, the greatest difference between the facilities in Hungary and Serbia is a result of the scale of complexity. The spas in Hungary have performed significant developments in recent years, in the interest of attracting as many target groups as possible. The spas in Serbia generally focus on fewer target groups.
<table>
<thead>
<tr>
<th>Spa’s name</th>
<th>Medicinal</th>
<th>Wellness</th>
<th>Number of pools</th>
<th>Number of hospitality industry units</th>
<th>Other</th>
<th>Number of services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ásotthalom</td>
<td>Weight-bath, electro-therapy. Water-jet massage, carbonated water treatment. Mud treatment, tangentor</td>
<td>infra-Finn sauna, indoor tanning, massage,</td>
<td>4</td>
<td>Snack-bar</td>
<td>Volleyball court and sand football field</td>
<td>3</td>
</tr>
<tr>
<td>Csongrád</td>
<td></td>
<td></td>
<td>7</td>
<td>Restaurant</td>
<td>Children’s playground, WIFI</td>
<td>13</td>
</tr>
<tr>
<td>Kecel</td>
<td>Closed</td>
<td></td>
<td>2</td>
<td>Closed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kecskemét</td>
<td>Physical-therapy</td>
<td>Jacuzzi, Finn sauna, steam bath, bio sauna, aroma cabin, salt-room, infra cabin, tepidarium, ice-chamber</td>
<td>12</td>
<td>Fast food restaurant, aqua and Caribbean restaurant</td>
<td>Play-house, fitness, fish cosmetics, nanny service</td>
<td>17</td>
</tr>
<tr>
<td>Kiskőrös</td>
<td></td>
<td>sauna, steam-chamber, massage, aqua-fitness, indoor tanning</td>
<td>8</td>
<td></td>
<td>Rest corner, beach football field, beach volleyball, tennis courts, WIFI</td>
<td>10</td>
</tr>
<tr>
<td>Kiskunfélegyháza</td>
<td>Steam-bath</td>
<td></td>
<td>8</td>
<td>2 snack-bars, one of them is seasonal</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Kiskunhalas</td>
<td>Medicinal swimming, weight-bath, medical massage treatment, physical therapy</td>
<td>Massage, sauna, indoor tanning, steam-cabin</td>
<td>5</td>
<td>Snack-bar</td>
<td>fitness, beach football, beach volleyball, pedicure, manicure, chapel, church</td>
<td>15</td>
</tr>
<tr>
<td>Spa’s name</td>
<td>Medicinal</td>
<td>Wellness</td>
<td>Number of pools</td>
<td>Number of hospitality industry units</td>
<td>Other</td>
<td>Other Services</td>
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<tr>
<td>Kiskunmajsa</td>
<td>Sauna-island, aroma sauna, Finn sauna, steam cabin, Finn dry-sauna, Jacuzzi, salt-chamber, indoor tanning</td>
<td>4 Fast food, restaurants</td>
<td>4</td>
<td></td>
<td>2 playgrounds, 1 maze, 2 volleyball courts, 1 football field, basketball court, 2 swing ball, 1 outdoors chess board</td>
<td>21</td>
</tr>
<tr>
<td>Kistelek</td>
<td>Physical therapy, water exercises, massage tub, medicinal massage, mud treatment</td>
<td>Massage, sauna</td>
<td>3</td>
<td></td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Kunfehértó</td>
<td></td>
<td></td>
<td>2</td>
<td>Snack-bar, restaurant, ice-cream parlor</td>
<td>Sports equipment rental (boat, aqua cycle, kayak, wind surf), electric go-cart course, educational path</td>
<td>7</td>
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<tr>
<td>Kunszentmiklós</td>
<td>Finn sauna</td>
<td></td>
<td>3</td>
<td>Snack-bar</td>
<td>Playground, swimming lessons, volleyball and other sports courts.</td>
<td>7</td>
</tr>
<tr>
<td>Lakitelek</td>
<td></td>
<td>Restaurant</td>
<td>6</td>
<td></td>
<td>4 person apartment, boat rental</td>
<td>3</td>
</tr>
<tr>
<td>Spa’s name</td>
<td>Medicinal</td>
<td>Wellness</td>
<td>Number of pools</td>
<td>Number of hospitality industry units</td>
<td>Other</td>
<td>Number of services</td>
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<tr>
<td>Makó</td>
<td>Swimming pool, mud treatment, weight bath, carbonated water bath, medicinal massage, tangentor, physical therapy, electrotherapy, Galvan treatment, iontophoresis treatment, electric stimulation, dynamic treatment, tens treatment, ultrasound therapy</td>
<td>9 types of massage, bioptron treatment, mud tub treatment, Dead-Sea salty bath, aroma bath, Cleopatra bath, red-wine bath</td>
<td>18</td>
<td>Bar, snack-bar</td>
<td>Baby swimming, safe, hair-styling, foot care, manicure, pedicure, playground, dentist’s office, football field, volleyball and other sports courts</td>
<td>45</td>
</tr>
<tr>
<td>Mórahalom</td>
<td>Medicinal drinking treatment, mud treatment, carbonate water bath, medicinal bath, tangentor, underwater physical therapy, Galvan treatment, interference, iontoforézis, ultrasound, medicinal pool, tub bath, weight bath, 14 TB treatments</td>
<td>11 saunas, indoor tanning, algae pack, aqua fitness, aroma therapy, Caracalla-tub, light therapy, Kneipp-treatment</td>
<td>21</td>
<td>Snack-bar</td>
<td>Shave-ice well, drift corridor, diaper changer, children’s playground, hair-styling, cosmetic treatment, manicure, pedicure, fitness</td>
<td>55</td>
</tr>
<tr>
<td>Spa's name</td>
<td>Medicinal</td>
<td>Wellness</td>
<td>Number of pools</td>
<td>Number of hospitality industry units</td>
<td>Other</td>
<td>Number of services</td>
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</tr>
<tr>
<td><strong>Szeged Anna Fürdő</strong></td>
<td>Mud treatment, tub bath, carbonated water bath, compartment Galvan treatment, medicinal swimming, weight bath, tangenter, butterfly tub with spine stretching equipment, four compartment adjustable jet bath treatment, medicinal tub, medicinal massage, physical therapy</td>
<td>Finn sauna, steam-cabin, infra-sauna, aerobic, aqua-fitness, aroma-cabin, callanetics, pleasure shower, intimate exercises</td>
<td>11</td>
<td>Snack-bar</td>
<td></td>
<td>22</td>
</tr>
<tr>
<td><strong>Szeged Napfényfürdő</strong></td>
<td>Daytime clinic, physical therapy rooms, tangenter, carbonated water bath, tub baths, mud pack, exercise pool, medicinal water pool, weight bath, medicinal massage</td>
<td>Finn sauna, infra-sauna, steam-chamber, salt-chamber, aroma room, timber sauna</td>
<td>16</td>
<td>Baby swimming, fitness, relaxation zone</td>
<td></td>
<td>21</td>
</tr>
<tr>
<td><strong>Tiszakécske Tisza-part</strong></td>
<td>Medicinal drinking treatment, bioptron light treatment, medicinal swimming, tangenter, physical therapy, post-operative rehabilitation</td>
<td>Finn sauna, stollen sauna, infra-sauna, steam-chamber, salt-chamber, kneipp treadmill, shave-ice tepidarium, massage</td>
<td>8</td>
<td>Fried dough stand, barbeque stand, snack-bar</td>
<td></td>
<td>18</td>
</tr>
<tr>
<td>Spa’s name</td>
<td>Medicinal</td>
<td>Wellness</td>
<td>Number of pools</td>
<td>Number of hospitality industry units</td>
<td>Other</td>
<td>Number of services</td>
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<td>------------------------------------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Tiszakécske</td>
<td>Closed</td>
<td></td>
<td>4</td>
<td>Closed</td>
<td>Beach football, Beach volleyball, Chess, Aerobic, Aqua jogging, Pig-Pong, playground</td>
<td></td>
</tr>
<tr>
<td>Kerekdomb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Ada</td>
<td></td>
<td></td>
<td>3</td>
<td>3 snack-bars</td>
<td>2 conference room, tennis, Ping-Pong, bowling alley, bicycle rental, gym</td>
<td>18</td>
</tr>
<tr>
<td>Apatin</td>
<td>thermo-electro-hydro therapies</td>
<td>4 massages, 2 Finn sauna</td>
<td>11</td>
<td>450 person restaurant</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Petrőc</td>
<td></td>
<td></td>
<td>5</td>
<td>15 bars\restaurants\ice-cream parlors\snack-bars</td>
<td>WIFI, gift shop, valuables’ safekeeping, swim suit shop, currency exchange, a small electronics shop</td>
<td>19</td>
</tr>
<tr>
<td>Bajsa</td>
<td></td>
<td></td>
<td>2</td>
<td>Snack-bar</td>
<td>Sand-box, playground, volleyball court, billiards, foosball</td>
<td>6</td>
</tr>
<tr>
<td>Óbecse</td>
<td></td>
<td></td>
<td>4</td>
<td>Snack-bar</td>
<td>Beach volleyball court, Ping-Pong table, playground, foot-tennis court, coffee-house, swimming school</td>
<td>1</td>
</tr>
<tr>
<td>Bezdán</td>
<td></td>
<td></td>
<td>2</td>
<td>Snack-bar</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Spa’s name</td>
<td>Number of hospitality industry units</td>
<td>Number of pools</td>
<td>Number of services</td>
<td>Wellness</td>
<td>Other</td>
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<td></td>
</tr>
<tr>
<td>Magyar-kánizsa</td>
<td>4</td>
<td>4</td>
<td>15</td>
<td>Tennis, gym, Ping-Pong, body form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Újvidék</td>
<td>6</td>
<td>3</td>
<td>2</td>
<td>Snack-bar</td>
<td>3 basketball courts, 3 volley ball massage, hair-stylist</td>
<td></td>
</tr>
<tr>
<td>Palics</td>
<td>5</td>
<td>4</td>
<td>9</td>
<td>Swimming lessons</td>
<td>2 massage, football field, volleyball court</td>
<td></td>
</tr>
<tr>
<td>Zombor</td>
<td>6</td>
<td>4</td>
<td>1</td>
<td>Playground, football field, volleyball court</td>
<td>4 massage</td>
<td></td>
</tr>
<tr>
<td>Zalánkemén-Horizont (Spa)</td>
<td>7</td>
<td>1</td>
<td>3</td>
<td>Massage</td>
<td>Speech and language therapy</td>
<td></td>
</tr>
<tr>
<td>Temerin</td>
<td>8</td>
<td>1</td>
<td>3</td>
<td>Snack-bar</td>
<td>3 sandy volleyball courts, playground, swimming lessons</td>
<td></td>
</tr>
</tbody>
</table>

Table 2: Significant spa services

Source: edited by AQUAPROFIT
In the course of our survey, with the assistance of available data based on characteristic profiles we classified the spas into categories, and we also analyzed the complexity of their service systems.

### 6.4. The complexity of the facilities

The regional, touristic and service provision capabilities, characteristics of spas can be summarized in a complex indicator, which shows the facility’s development level, but also takes regional endowments into consideration at the same time. In this we display a number of indicators combined, some of which we have already analyzed in detail above. From among the indicators, we surveyed the number of pools, and their indoors or outdoors location, as well as the ranges of services, beside these we examined in detail the presence and types of accommodation, marketing...
activity, the characteristics of discounts etc. With the combination of the indicators the development levels of spas compared to each other became visible, which are shown in the following figure.

![Figure 8: The level of complexity of surveyed spas (2011-2012)](image)

*Source: edited by AQUAPROFIT Co. based on date request sheets*

The potential of spas is primarily determined by the characteristics and discipline of their financial management. Future developments greatly depend on the facilities’ own financial resources, their credit rating, and the financial resources available to them. For the South Great-Plain, European Union resources are more significant, while in the case of Vojvodina they can primarily rely on the resources of the regional provincial large-investment-project fund, and the EU pre-joining funds, the European Regional Cooperation (ETE; IPA programs).

In Serbia the potentials realizable in spa tourism are recognized in increasingly larger circles, as well as the fact that medicinal treatments, rehabilitation activities deserve a significantly larger emphasis than the current level. The majority of medicinal spas
are yet unprepared today, which is reflected by their business hours. Beside state financed patient care, they place a rather small emphasis on the special demands of paying guests, for example hotel accommodation, higher standard medical treatment, or wellness and medicinal services.

6.5. The observations about spa usage

6.5.1. The spas of Vojvodina as seen with the eyes of spa guests and experts

We examined the components of supply and demand in the spas of Vojvodina with a qualitative field-study method, with questionnaires and field-work based on the preparation of interviews. By examining the spas of Vojvodina it can be determined that the development level of their majority – because of the absence of investment in the past decades – shows a situation similar to the situation in Hungary before the development opportunities of the first Széchenyi Plan. Meaning that we are talking about spas which are founded on old traditions, were constructed a long time ago, are obsolete, provide only a minimal amount of services and operate seasonally, which primarily attract local residents and people from their immediate vicinity. In Serbia health and wellness tourism are separated to a much larger extent than in Hungary, and along with them the medicinal spa and adventure (wellness) spa categories as well. In those locations, where verified medicinal waters exist, primarily special hospitals have been established and they are mainly visited by patients with doctor’s recommendations.
While in the case of other spas, even if they possess thermal water with medicinal effects but that fact isn’t certified, then no medicinal treatment is available to guests. Therefore the situation of the spas of Vojvodina is similar to the situation of the spas of Bükfürdő, Hévíz and Harkány in Hungary, the fundamental function of which is to provide medicinal services for ill patients (of course, there is an opportunity for visiting these spas without a doctor’s recommendation as well, both in Hungary and in Vojvodina, but this is fundamentally not characteristic). Even though there are also some spas in Vojvodina, where medicinal and wellness services and a medicinal and an adventure spa division are both available, thus they satisfy the demands of both the younger and older age groups.
The majority of spas involved in the survey (with the exception of the Apatin and the Petrőc spas) provide a modest selection of services, these are spas with only a few pools (Table 3). The Ada spa (Figure 10) is fundamentally family centric, it welcomes its guests with 3 pools and 2 smaller slides, it doesn’t possess medicinal water. The Óbecse spa has a modest medicinal spa division, it rather has a sports pool. Contrary to this the spa of Temerin places an emphasis on services of both medicinal water and the sports pool equally.

![Figure 10: The swimming pool of the Ada spa](source: photo Martyin, Z. (2013))

The Apatin (Junakovič) spa is a recognized medicinal location, therefore it also provides versatile services, and beside its medicinal water pools, it welcomes its younger guests with adventure pools as well, along with a slide and a diving platform. Beside this, it’s the only spa among the surveyed ones that provides an opportunity for enjoying a sauna (contrary to the spas in Hungary, where in most spas there is already an opportunity to use a sauna).

The Petrőc spa (Figure 11) sticks out of the list of other saps, on the one hand considering its services, on the other hand it „The
most modern aqua-park of the Balkan region” commenced its operation in 2012, while the others have been operation for 25 to 30 years. The facility is an example for the emergence of financial investment intentions. (The circle of its investors is the operator of the ski-courses of the Tátra mountains and the owner of Aqua-city in Poprád.) During the selection of the location they took 3 factors into consideration:

- Proximity to the E 75 freeway, they intend to “refresh” the tourists traveling to Greece here.
- The market, proximity of Novi Sad and partially of Belgrade
- The municipality in Vojvodina has an ethnic Slovakian majority, an example for the functioning of patriotic capital
- The complex possesses thermal water, but not certified medicinal water.

Figure 11: A few giant slides of the Petroland spa (Backi Petrovac)

*Source: photo Schwertner, J. (2013)*

The aqua-park of Petróc (Petroland) possesses 3 adventure pools, 8 giant slides – with 3 reception pools, and beside this the so-called “children’s paradise” provides a recreational opportunity for the smallest guests.
We observed that in the majority of the municipalities the spas are situated in the optimal location from the point of view of future expansion, development, they aren’t crowded into the town center. However, it was interesting that from among the respondents of the questionnaire only a very few would develop something about the specific spas, therefore in the framework of the interviews we examined this subject from the point of view of experts and managers. According to the experts, considering the future, it’s of crucial importance if these spas can step forward, if they are able to develop, improve or not. Specifically, because of the low quality services, taking advantage of the proximity of the border and the oversupply on the Hungarian side, a significant circle of Serbian guests are regular visitors of Hungarian spas. The objective of the management is to provide services in the quality
similar to that of the Hungarian spas along the border, thereby keeping the potentially interested Serbian circle of guests here. Most spa managers have specific plans (for example Ada: the drilling of a thermal well, the construction of an indoor pool; Petrőc: the construction of guest accommodations; Óbecse: the construction of a new medicinal adventure pool), however, in the absence of the appropriate financial resources these plans are still awaiting their realization. The majority of experts only hope for a larger upswing, and the establishment of a situation similar to Hungary, after joining the European Union. In the course of the interview it was also revealed that not only the absence of investors has an influence on slow development, rather the uncertain political and economic situation, which is characteristic in the region, conflicts of interest and the absence of the above mentioned subsidies.

Based on our experiences it’s evident that there is already a huge amount of unexploited potential in the spas of Vojvodina, the majority of them are obsolete facilities in need of development. The respondent guest had a good time in the spas, it appears that this environment means a small separate world for them, which is also proven by the fact that they evaluated public safety as above the average.

An overwhelming majority of the respondents can’t even imagine that they could have spas similar to the neighboring Hungarian territories, even though their endowments would make that possible. Even the experts primarily hope for an upswing after the country joins the EU, while until then they are trying to take advantage of the various pre-joining funds with the assistance of the territories across the border.

Considering future health tourism developments, even though specific plans have been made already, for which there would also be a demand, these haven’t been realized so far. In the course of the interviews it was also revealed that the absence of these
developments isn’t only caused by the lack of investors. On the one hand, without central support it’s almost impossible to take any local action, on the other hand the political situation considerably influences the current processes and opportunities. „Everything here is infected by politics” – stated one of the interviewees. A number of local residents mentioned that the lack of expertise is characteristic of several persons in leadership positions, without which they aren’t expecting significant development in the long term. Thus, it can be established that the Serbian spas despite their good endowments are as of yet moving on a different trajectory than the neighboring Hungarian spas, because of the above described reasons.

7. The demand side of spas

7.1. The number and composition of visitors

From among the indicators of touristic characteristics the number of visitors has a determining role. The data collected related to recent years may reflect the success of the specific spa, the effects of investments, or its operational malfunctions. Beyond the visitor data related to the facilities, we examined the touristic indicators related to the municipalities as well, beside which we also compiled experts’ estimates.

The spas which register low visitor numbers generally operate on a lower quality level and are situated in smaller municipalities, there is usually no other attraction in the municipality (such as Ásotthalom, Kistelek, Kunszentmiklós, Bajsa). In the case of these facilities, the visitor numbers are characteristically scattered between 4,000 and 50,000 persons.
The facilities with visitor numbers between 50 and 100,000 persons are spas or medicinal hospitals built on a specific group of services (such as Ada, Óbecse, Temerin, Újvidék, Csongrád, Palics).

The facilities with visitor numbers between 100 and 200,000 persons are generally situated in larger municipalities, where beside the spa the town itself possesses other touristic attractions. These spas are high-quality special medicinal service institutions (medicinal hospitals), or spas providing a complex range of services (such as the Szeged Annafürdő, Kiskórös, the Zalánkemén medicinal hospital, Magyarkanizsa, Tiszakécske-Tisza-part, Kiskunhalas, Apatin).

The largest visitor numbers are registered in the facilities of Makó, Szeged Napfényfürdő, Kiskunmajsa, Mórahalom. Between 275 and 415,000 persons visit these facilities annually. The most developed spas providing a complex range of services are included in this category.

According to our data, in 2005, approximately 600 to 650,000 persons visited the 13 Serbian spas and medicinal hospitals which were examined in more detail. Since then the number of visitors to the facilities has increased, and in 2012 it reached 750,000 to 800,000 persons. The 15 examined operational facilities in Hungary in 2005 were visited by approximately 1,500,000 persons, while in 2012 by as many as 2,300,000 to 2,400,000 persons.

Based on our observations in the course of our field-work, despite the fact that in most surveyed spas in Vojvodina we were faced with a rather pitiful service selection, the respondent guests were satisfied with the provided services, at the evaluation of these on a 1 to 5 scale every criteria received a rather good result (Table 2). The most satisfied guests were in Petrőc (with a 4.46 average), the most unsatisfied in Óbecse (with a 3.95 average). It was a surprising result that in every spa public safety received
one of the highest values, even though this isn’t characteristic of Vojvodina according to general knowledge. This probably proves that the spas constitute a separate little “world”, where people feel themselves more secure. The quantity of services and the number of pools received the worst results, which can be placed in parallel with the above described characteristics of the spas (Petrőc, which provides the most services was the only place where there were no complaints about this). The opinions of the guests were in agreement to the highest degree in the evaluation of the staff and public safety (these showed the smallest dispersion), the most divergent evaluations are observable in the case of the variety and cleanliness of the pools (the dispersion of these was the largest)
Figure 12: Visitor numbers at the surveyed spas (2011-2012)

Source: edited by AQUAPROFIT Co. based on data request sheets
<table>
<thead>
<tr>
<th>Surveyed spas</th>
<th>Factors receiving the best evaluation (average evaluation received)</th>
<th>Factors receiving the worst evaluation (average evaluation received)</th>
<th>Average of the 10 evaluations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ada</td>
<td>environment (4.70) Public safety (4.33)</td>
<td>Quantity of services (3.84) Price-value ratio (3.59)</td>
<td>4.11</td>
</tr>
<tr>
<td>Apatin</td>
<td>Public safety (4.49) Variety of pools (4.42)</td>
<td>Environment (3.67)</td>
<td>3.98</td>
</tr>
<tr>
<td>Bečej</td>
<td>Public safety (4.42) staff (4.31)</td>
<td>Variety of pools (3.57) Water quality (3.54)</td>
<td>3.95</td>
</tr>
<tr>
<td>Bački Petrovac</td>
<td>Public safety (4.79) Cleanliness (4.76)</td>
<td>Water quality (3.98) Price-value ratio (3.85)</td>
<td>4.46</td>
</tr>
<tr>
<td>Temerin</td>
<td>Public safety (4.79) Public safety (4.65)</td>
<td>Quantity of services (3.93) Variety of pools (3.56)</td>
<td>4.34</td>
</tr>
</tbody>
</table>

Table 4: The evaluation of specific services of spas on a 1 to 5 scale, the services receiving the best and the worst results, and the average of the evaluations

Source: edited by Schwertner J. – Martyin Z., based on questionnaire research

In Petrőc and Ada the price-value ratio was also emphasized as one of the worst attributes of the spa. If we compare the entry ticket prices of the surveyed spas, it can be stated that except for the spa in Petrőc, they operate with relatively low ticket prices, in Hungarian comparison absolutely (in the interest of easier comparison we included 2 Hungarian (near the border) spas into the comparison as well, the one in Mórahalom and the Szeged aqua-park which is similar to the Petrőc spa). However, if we also compare the provided services with the prices (meaning that we approximately examine the price-value ratio), the spa in Ada can’t be considered
so cheap any more (Table 3). Even though the ticket price in Ada is one third of the price of the entry ticket in Mórahalom (only HUF 620 instead of HUF 1,900\(^7\)), the spa in Mórahalom provides seven times more pools and significantly more services than the spa in Ada. While examining the Serbian spas we also observed that only the entry ticket prices of the Apatin and Petrőc spas are higher, which also provide significantly more services, so why did the guests evaluate the price-value ratio negatively in Ada. The fact is also relevant that it was exactly in the Ada spa where the income of guests, according to their own admission, was the lowest (the respondents in Ada, from the point of view of income, evaluated themselves at the average of 5.57 on a 1 to 10 scale).

<table>
<thead>
<tr>
<th>Spa</th>
<th>din</th>
<th>HUF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Szeged, Napfényfürdő</td>
<td>1610</td>
<td>4300</td>
</tr>
<tr>
<td>Kecskemét</td>
<td>1348</td>
<td>3600</td>
</tr>
<tr>
<td>Petrőc</td>
<td>1000</td>
<td>2670</td>
</tr>
<tr>
<td>Makó</td>
<td>824</td>
<td>2200</td>
</tr>
<tr>
<td>Kiskunmajsa</td>
<td>712</td>
<td>1900</td>
</tr>
<tr>
<td>Mórahalom</td>
<td>712</td>
<td>1900</td>
</tr>
<tr>
<td>Szeged, Anna fürdő</td>
<td>618</td>
<td>1650</td>
</tr>
<tr>
<td>Tiszaecskes-Part</td>
<td>524</td>
<td>1400</td>
</tr>
<tr>
<td>Tiszaecskes-Kerekdomb</td>
<td>375</td>
<td>1000</td>
</tr>
<tr>
<td>Kiskörös</td>
<td>375</td>
<td>1000</td>
</tr>
<tr>
<td>Lakitelek</td>
<td>375</td>
<td>1000</td>
</tr>
<tr>
<td>Kiskunfélegyháza</td>
<td>337</td>
<td>900</td>
</tr>
<tr>
<td>Kiskunhalas</td>
<td>337</td>
<td>900</td>
</tr>
<tr>
<td>Kistelek</td>
<td>337</td>
<td>900</td>
</tr>
</tbody>
</table>

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\(^7\) Based on the exchange rate of MNB in September 25\(^{th}\), 2013 (1 RSD = 2.7 HUF)
From the point of view of income the guests of the Petrőc spa evaluated themselves the highest (with a 6.28 average), this is on the one hand the result of the fact that this is where we met the most foreign tourists, on the other hand those with low incomes couldn’t afford the price of the entry ticket. Even though Petrőc is on a higher quality standard and provides more unique services than the other spas in Vojvodina, it can be considered expensive even in Hungarian comparison (the price of the entry ticket is approximately HUF 3,375). The fact that the Szeged Napfényfürdő – Aquapolis is HUF 1000 more expensive (the price of the entry ticket is HUF 4,300), may be a bit deceiving, so I would mention here that the Szeged spa is one of the most expensive in Hungary. (If, for example, we compare it to another aqua-park which provides similar services, the spa of Hajdúszoboszló, where the price of the entry ticket is HUF 2,900, then it can be stated that the spa in Petrőc is more expensive than that, and it doesn’t provide more services at all).

Table 5: Daily entry ticket prices of surveyed spas, in decreasing order
Source: own data collection AQUAPROFIT Co.
It’s a well-known fact that the medicinal-spa and spa guests arriving from Serbia to the South Great-Plain mainly seek higher quality services and more diverse, experience rich recreation opportunities in Hungary. They do this despite the fact that the spas in Vojvodina - especially the spas which only open for the summer – are cheaper than the spas in Hungary, which is partially the consequence of the lower quality and quantity of services (less pools in worse condition, less experience components).

Figure 13: The vicinity of spas (Ada and Bački Petrovac)
Source: edited by Schwertner J. based on questionnaire surveys

It was conspicuous from the responses of spa guests that the circles of guests arrive from different distances. While in the spa of Ada half of the guests arrive from Ada and a further 25% from the municipality, in the spa of Bački Petrovac 90% of guests arrived from more than 40 km away. The spa in Ada is clearly local, while
the spa in Bački Petrovac can be considered macro-regional. In light of this, it’s thought provoking that the majority of guests in Ada travel from nearby, but arrive by car. While observing the spa guests, we noticed that it’s rather larger companies, families, friends who visit the spas, the proportion of those arriving alone or with a partner is lower. This observation was also supported by the questionnaire survey, according to which most guests arrived with their families (especially in the case of Ada and Petrőc), or with friends, acquaintances (especially in the case of Óbecse and Temerin) (Figure 14). The fact that the greatest number of people arrived to Ada and Petrőc with their families, is also supported by the fact that these spas were considered to be the most child-centric and family-friendly by the guests.

![Figure 14: Who did the respondents arrive with to the spas? – the distribution of responses](source: edited by Schwertner J. – Martyin Z., based on questionnaire survey)

In Hungary those of the older generation arriving alone are also characteristic spa guests, which may be a consequence of the earlier mentioned more complex spa service selection, since in most spas in Hungary there is medicinal water, which satisfies the demands of the older age group. This assumption is supported by
the fact that here as well the most guests arriving alone were in Apatin, where we can practically talk about a real medicinal spa, medicinal center. The least guests arriving alone were in Petrőc, which is a result of the rather high entry ticket price and its difficult accessibility. Specifically, it’s located far away from the town center, therefore it’s only accessible by bus or by car, but people choose primarily the former method of transport (84% of respondents arrived to the Petrőc spa by car). The majority of respondents, despite the low quality of services, visited the spa as part of a whole or half day excursion. Beside this, of course, the tourism of the surveyed municipalities is hindered by the fact that aside from the spa there is hardly any other attraction in these locations. According to the majority of respondents, it’s worth spending half a day in the spa in Óbecse (64%), in Temerin (52%) and in Ada (46%). In Petrőc according to 89 % of respondents it’s worth spending a whole day in the spa, which on the one hand is the result of their services, on the other hand it may be attributable to their high ticket price, which the guests only consider worth paying if they spend the whole day at the spa. Beside this, it was in Apatin where the most guests stated (21% of respondents) that it’s worth spending several days there, which is obviously the consequence of their medicinal services and the availability of accommodation. For those who take advantage of medicinal treatments, it’s worth staying in the location for several days.

66% of respondent often visit other spas as well, while 11% of them primarily visits the spa where they were when they responded. Among the most visited Serbian spas they mentioned the ones in Ada, Óbecse, Petrőc, Kanizsa and Zenta. It was interesting that most guests also often visit spas in Hungary, among these by far the most of them mentioned the Mórahalom spa (24%), but several of them had been to the spas in Szeged, Harkány and Gyula
as well. They were conspicuously well informed, and they regularly take advantage of the services of other spas. Many of them believe in the healing power of the waters there, of course, this is justified in the case of Temerin and Apatin, but 70% of even the spa guests of Ada opined that the opportunity of using the spa has healing properties for them (Figure 13) In other words, they are optimistic and they seek medicinal or other waters. This means an encouraging message from the point of view of the market survey.

![Do You believe in the healing power of medicinal waters?](image)

**Figure 15: Do You believe in the healing power of medicinal waters?**

*Source: edited by Schwertner J., based on a questionnaire survey*

Based on the research it’s evident that there is a great amount of unexploited potential in the spas of Vojvodina, the majority of them are obsolete facilities in need of development. Despite this fact, the guests visiting them were satisfied, they had a good time and didn’t recommend significant developments. However, it may
be sensed from their responses that the reason they don’t wish development, isn’t that there wouldn’t be demand for those, they rather believe that they have to accept this situation as it is („it won’t be better anyway”), this is their destiny. In our opinion, the reason why Hungarian spas are on a higher standard is that they have opportunities to be so, their developments are subsidized, while the development of Serbian spas wouldn’t be subsidized by anyone anyway. The experts were more optimistic than this, but they also only hope for more considerable development in the case of the future positive trend of subsidies, tenders and cross-border cooperation.

8. Development strategies

8.1. Plan supply, development experiences

It’s justified for us to examine how planning is performed in the action area of the Cooling Cubes Project, in a broader sense in connection with spa development in Hungary and Serbia. Do they assist the development processes appropriately?

8.1.1. Planning in Hungary

Within the regional planning process in Hungary the utilization of thermal water is in an outstandingly favorable position, because with the assistance of the UN, between 1973 and 1976, the thermal project study entitled “The long term development concept of tourism based on thermal water” was prepared (UNDP – HUN (71) 511).
A number of foreign and Hungarian experts worked on the project, thus Hungary was the first in the world to elaborate its complex, nationwide strategy and long term development concept. The project was prepared based on the complex analysis of the trends and problems of international and domestic tourism.

The Thermal Project was founded on the survey and examination of Hungarian thermal water reserves and thermal municipalities and based on this the elaboration of long term, medium term and model plans for thermal municipalities, as well as estimates of the costs of their realization.

In the course of the project, a detailed survey and its processing was performed in the case of a total of 352 municipalities which possess the endowments for thermal vacation spots. The examination included: the measurement of thermal water reserves, which showed that thermal water is present under ¾ of Hungary’s territory, a portion of which are natural hot water springs, while another portion are subsurface water reserves producible by positive and negative wells.

The completed Thermal Project wasn’t suitable to provide information to a broader circle because of its extensive volume that was the reason for the publication of a book, in Hungarian and in English concurrently, entitled “Hungary’s unparalleled natural treasure”, compiled by David Grove, the English economist invited for this by the UN, who is an internationally acknowledged expert of regional development, and was edited by Anna Bosznay, the Hungarian project manager. In the process of Hungarian spa development the second upswing was caused by the preparation of the health tourism sub-program of the Széchenyi Plan’s Tourism Program.

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8 Kondor A. 2013. The Forum of Health Tourism Development Strategy and Spa Tourism, Szombathely
• The results of the Széchenyi Plan were impressive:
• Investment projects with the total value of almost HUF 100 billion were realized with a sum of HUF 31.2 billion in subsidies.
• The average length of the season grew from 221 days to 316 days, the water surface of spas was increased by 47%.
• As a result of the development projects the annual capacity of spas increased by 50.5%.
• Green-field development projects occurred at the following spas: Sárvár, Győr, Pápa, Cegléd, Zalaegerszeg, Kehidakustány.

Spa developments in the course of the Széchenyi Plan already emerged as complex developments expanded with touristic and economic components, the development and expansion of existing spas and connected accommodations occurred (Bük, Harkány, Debrecen, Gyula, Hajdúszoboszló, Zalakaros).

<table>
<thead>
<tr>
<th>Statistical region</th>
<th>Number of subsidized projects</th>
<th>Total sum of subsidy (HUF million)</th>
<th>Total sum of development (HUF million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budapest-Central-Danube region</td>
<td>10</td>
<td>4.408</td>
<td>11.767</td>
</tr>
<tr>
<td>Central-Transdanubia</td>
<td>8</td>
<td>2.698</td>
<td>7.408</td>
</tr>
<tr>
<td>West-Transdanubia</td>
<td>31</td>
<td>10.484</td>
<td>29.683</td>
</tr>
<tr>
<td>South-Transdanubia</td>
<td>14</td>
<td>2.688</td>
<td>6.860</td>
</tr>
<tr>
<td>Northern-Hungary</td>
<td>13</td>
<td>1.970</td>
<td>5.826</td>
</tr>
<tr>
<td>North Great-Plain</td>
<td>32</td>
<td>4.531</td>
<td>10.875</td>
</tr>
<tr>
<td>South Great-Plain</td>
<td>17</td>
<td>4.010</td>
<td>8.700</td>
</tr>
<tr>
<td>Total:</td>
<td>125</td>
<td>30.789</td>
<td>81.119</td>
</tr>
</tbody>
</table>

**Table 6: The developments of the Széchenyi Plan between 2000 and 2004**

*Source: own data collections*
In the process of the preparation for the European Union planning, as a component of the National Development Plan (NFT) the National Tourism Development Strategy (NTS, 2005) emerged. This document designates the development directions of the sector for the period between 2005 and 2013, and provides the foundation for NFT’s tourism related portions, its priorities are as follows:

- **Health tourism**,  
- Heritage tourism,  
- Conference tourism.

In the course of this planning there was already a broad social discussion process, the results of this were applied at the finalization of the strategy.

In the National Regional Development Concept the integrated regional utilization of Hungary’s thermal water treasure is an emphasized objective, therefore the nationally emphasized objectives and tasks of national regional development policies are:

- The protection and preservation of the thermal water treasure,  
- The sustainable, complex and integrated regional exploitation of subsurface waters (economic-industrial, recreational-medicinal)  
- The supply differentiation of health tourism destinations  
- Integrated regional innovative touristic development  
- Supporting the establishment of industrial, service, product development, and research areas, networks

The National Health Tourism Strategy was prepared in this intense planning process in 2007, suitable for Hungarian as well as international demand with the objective of sustainable health tourism development.
Beside the lofty objectives, it highlighted the following priorities:

1. The conscious product development of health locations built on natural endowments
2. The harmonization of healthcare and medical science with health tourism, the subsidization of research
3. The development of services connected to Wellness
4. The enhancement of medicinal and wellness hotels’ capacity
5. Making marketing activity more effective
6. Development and restructuring of the education-training system
7. The establishment of the operation framework of health tourism

In the New Hungary Development Plan, between the years 2007 and 2013, health tourism, cultural, eco, active and wine tourism received emphasized roles. In the first two years of the plan period, in the 2007 to 2008 action plan period, HUF 55 billion was available, which was won by 163 subsidized tenders, the total value of the realized investment projects was more than HUF 76 billion. Of this subsidy amount HUF 12.2 billion of tender subsidy was invested in medicinal and thermal spa development. In the 2009 to 2010 action plan period, the HUF 30 billion available amount, which was more than previously, was invested into the realization of emphasized attraction developments.

In the National Development Concept accepted in 2013, the realm of medicinal and wellness spas receives an emphasized development attention. „The health industry, based on the utilization of Hungary’s rich thermal and medicinal water reserve and geothermic endowments, should connect into a single system of the industry branches serving the preservation and restoration of health, and health conscious lifestyle. The health industry’s significance is increased by the fact that it includes innovative and research intensive areas, with considerable, partially unexploited
international market potentials, and a rather significant and further expandable employment base. The development of the health industry may also assist the healthcare provision system’s operations. The financial demand related to the health industry can be ensured by both international and Hungarian demand.”


The significant development level differences in Serbia’s territory pointed out the fact that Serbia needs such development documents, which serve as a support and guide for the achievement of balanced regional development. Related to this, the Serb Republic’s Regional Development Strategy was prepared, encompassing the period between 2007 and 2012, which was the first strategic document in Serbia outlining regional development that defines the fundamental priorities of the republic’s regional development completely and in a consistent manner. The defining of Serbia’s regional structure was preceded by long preparations, debates and consultations, several regional structure version were born, in spite of this the Act concerning regional development enacted in the summer of 2009 defined Serbia’s (regional) structure consisting of statistical-functional regions, and integrated its institutional system into the fundamental principles of Serbia’s redrafted regional development strategy, which came into effect in the June of 2009, and which was flexibly conforming to EU requirements.

Serbia’s development regions (economic/statistical) have to increase their own innovative capacities, reduce their wasteful

9 Government resolution 1254/2012. (VII. 19.) Government resolution related to the renewal of regional development policy, regarding the elaboration of the new National Regional Development and the new National Development Concepts
management as well as strengthen cooperation between regions and increase Serbia’s international competitiveness. Regional development programs have to become the fundamental instruments of regional development, by the means of which Serbia’s comprehensive, functional integration can be realized. This is the fundamental strategic principle of Serbia’s regional development.

The Serb Republic’s Regional Development Strategy was drafted based on a resolution of the Serbian government, accepted on December 19th, 2008, regarding the elaboration of a Regional Development Strategy pertaining to the Serb Republic. (The abbreviated designation of the document: SPRS_2020). 10

The Strategy contains the concept of Serbia’s long term, sustainable regional development, as well as the long term strategic objectives of integrated development related to all regions and sectors. It does all this in the interest of establishing the conditions for the utilization of resources and comparative advantages in the territory as much as possible, and making Serbia’s territorial and functional integration into the European region possible.

The cautionary measures, defense tasks, country planning work and construction to be performed in Vojvodina Autonomous Province have to be in conformity with the elaboration and acceptance of the Regional Development Plan, which serves as the foundation of strategic developments. The first plan managing the arisen issues, which was related to the territory of Vojvodina is known by the public as the Vojvodina regional development plan. The founding document was accepted in 1978. The deadline for the achievement of the tasks included in the plan was the year 2000. In 2009, The House of Representatives of Vojvodina Autonomous Province

10 Valentina Ivanić: Founding study regarding the developments that have occurred in Vojvodina Autonomous Province. Agencija za ravnomerni regionalni razvoj AP Vojvodine 2012.
passed a resolution regarding the elaboration of a regional development plan for Vojvodina AT, with the formulation of which the Vojvodina Urbanity Institute was assigned. The staff of the University of Novi Sad also provided professional assistance in the course of the work, as a result of this the plan was accepted in 2011.

The realization of the regional development plan in the period between 1978 and 2011 was characterized by the following phases:

• In the period between 1978 and 1990: Vojvodina AT’s Regional Development plan was completely realized,

• In the period between 1990 and 2000: the dramatic events which occurred in Serbia and the former Yugoslav region, severely impaired, or entirely halted the realization of the contents of the Vojvodina AT’s Regional Development plan. Meanwhile, specifically in 1996, the Serb Republic’s Regional Development plan was enacted. As a consequence of this, specifically because of the vertical hierarchy, certain portions of Vojvodina AT’s Regional Development plan became inoperative, or only those portions remained in effect, which were not contrary to the regulations of the republic’s plan.

• The period between 2000 and 2011 was characterized by a process of social transformation, a number of reform measures were born, the movement organized for the establishment of macro-economic stability commenced, a process of structural transformation, privatization and closing the gap with the European union, which resulted in a dynamic process of amending laws affecting the entirety of society and the economy. From 2003 the country planning of Vojvodina was exclusively managed in accordance with the Act concerning Planning – Construction, and the regulations of the Country Planning Act of the Serb Republic.
The responses with “regional development” characteristics, provided for questions related to development needs, have long term synergy significance, which is clearly stated in the new Vojvodina regional development plan. This document was accepted in December 2011.

In summary it can be established that the fundamental plan documents are available in both countries, but planning capacities are currently on a more modest scale in Serbia, than in Hungary. Compared to the Hungarian document, the development of spas and health tourism in Serbia appear in a more tinged form, both as an objective and a development instrument.

8.2. International experience - Some good Hungarian and international practices of spa development

When we talk about good practices in spa development, it’s not absolutely only specific case studies which are worth considering, since the knowledge of the general, tried and tested methodology possesses have at least as much significance. In the spirit of this, we attempt to provide guidance and ideas in this chapter of our study.

In the case of thermal and medicinal spas we differentiate between two fundamental types: the traditional spa centers with long histories belong in one of the groups, while new facilities belong in the other. In the case of old thermal spas we can observe the dominance of medicinal function in a much larger proportion, while the newer spas prefer to specialize in wellness services which provide for the maintenance and preservation of the condition of health. However, from the point of view of successful operation, there are no significant management differences, particularly when it comes to marketing activity and product
development, specifically, success can be achieved with the same operative instruments in relation to the groups of spas functioning with both profiles.

Based on several decades of experience by an international team of experts who are active in various areas of spa development Creative Spa Concept consulting company worked out a model, the systematic implementation of which guarantees the successful development of spas. In the interest of success the following development tasks have to be systematically performed as the preconditions of efficient spa development:

Phase 1
• Market research
• Revision of the business plan
• Concept formulation
• Facility development (external and internal design, subsequently to defining the range of services)
• Financial planning/Preparation of a feasibility study

Phase 2
• Re-examination of the building’s structure and its interior
• Selection of furnishing and the formulation of the optimal price-value ratio

Phase 3
• Development of characteristic products and services
• Formulation of a „Spa-menu” (service combinations)
• Character building (making the spa unique)
• Home page development
• Planning of marketing, with particular attention to sales
• Planning of Public Relations
Phase 4
- Operational planning
- Planning of retail sales
- Employee recruitment – planning of employment
- Preparations preceding the opening of the facility
- Training and further training of the spa’s staff on site

8.2.1. The „Get Spa Smart” concept, meaning spa development in a smart way

„Experiencing the spa means freedom, freedom is the oxygen of the soul.” This is the fundamental thought of the methodology elaborated by Mindy Terry, which means the essence of the „Get Spa Smart”, and which method has been made accessible free on the home page of the Creative Spa Concept consulting company, with the hope that the valuable information in it may provide inspiration for the creative development of facilities which provide spa and wellness services.\(^{11}\)

Practically, the experts of the above specified international consulting company, which specializes in spa development, recommend such tried and tested techniques, which facilitate the more accurate operation of spas, while making the managers into more successful developers.

As Mindy Terry says;„...because, when someone is fond of something, then she wishes to find out something new about the object of her fondness every day.” This is how it should happen in the case of efficient spa development as well.

\(^{11}\) www.creativeconcepts.com
The more significant steps, which determine the successfulness of spa development:
1. Circumspect planning: how to position the company in a way that it will ensure the most successful result
2. Planning and construction: to protect the spa from hidden obstacles even before its commencement
3. Building a brand name
4. Preparing an operative plan
5. Provision of human resources
6. The spa’s „furnishing”
7. Spa training for employees (technical training)

There are detailed descriptions and smaller studies related to the tasks of individual work phases on the above cited home page, thereby the contents of the web page make a kind of self-education possible for the professional reader.

8.2.2. The Hungarian model

Reviewing the above described general fundamental principles of development it can be stated that the experiences gained in the area of spa development in Hungary can be a valuable example for Serbian spas, and their results can be used well. It’s particularly important for Serbian facilities to review how Hungarian spas expanded the exclusively medicinal purpose spa operation functions financed by social security, to wellness services which assist in the prevention of illnesses and provide rejuvenation for the body and the soul.
In the history of Hungarian spas that duality is particularly evident, which relates to the difference between the traditional, international spas and the newly founded spas. The tourism policies of Hungary have always treated the matter of spa development as an emphasized area, and in Hungary after the democratic transformation – in the beginning under the name thermal and medicinal tourism, later as health tourism – the matter of spa development was placed among the outstandingly treated touristic product groups. The earlier presented development policy is a valuable example also because on the one hand this level of focus in the national tourism policies on the product group is necessary so with this kind of consistency spa development can be successful in the long term, on the other hand this model also excellently exemplifies that tourism policy intentions aren’t enough by themselves, there is a necessity to concurrently establish an adequate financing background.

Hungarian spa development has been supported by such marketing instruments as the 2008 campaign entitled “The year of waters” by Magyar Turizmus Zrt. (Hungarian Tourism Corporation.) Within the framework of this a new nationwide image publication and regional publications (the latter including specific service offers) as well as advertisement films, appearances at Hungarian and international exhibitions directed attention toward Hungarian spa culture.

On the home page of Magyar Turizmus Zrt., there is extremely detailed information for anybody who is interested, the professionally interested, or the tourists, related to the selection of Hungarian health tourism products, from adventure spas, through wine-hotels providing wellness services, all the way to Hungarian gastro-wellness, just to mention the more exciting ones. This unique selection is also exemplary, since in Hungary the process has already been completed, as a result of which spas have strongly specialized, by
this breaking out of their generalized boxes of being “just another medicinal spa” or “just another wellness vacation spot”.

8.2.3. The example of Kehidakustány

This is the municipality that is situated on the economic periphery, and in the case of which tourism development (within this primarily spa development) exerted a positive influence on the local economy. Conscious and planned touristic development may provide a remedy for the crisis of rural regions, if the municipality possesses the appropriate endowments for this. Here is the example of Kehidakustány, where tourism provided a solution for employment problems, the improvement of population retaining capacity, and it caused an upswing of the local economy.

Kehidakustány is situated in Hungary, in the West-Transdanubia region, in Zala county on the two banks of the river Zala. The municipality with a population of 1218 souls\(^\text{12}\) is administratively a part of the Zalaszentgrót district. After the democratic transformation the region was considered to be an economic periphery and Kehidakustány as a disadvantaged municipality, despite the fact that geographically it’s in a favorable location (32 km away from the County seat and 20 km away from Lake Balaton).

Thermal water was discovered in the municipality in the 70s, (while searching for drinking water) about which it was soon revealed that it had healing effects, therefore in the middle of the 80s a spa was established for the local population, which operated in a seasonal way until 1999. In the middle of the 1990s the municipality, and with it the municipally owned spa drifted to

\(^{12}\text{KSH (http://www.ksh.hu/docs/hun/hnk/hnk_2013.pdf)}}
the edge of bankruptcy (they couldn’t afford the maintenance of water and sewage pipelines). The company maintaining the pipelines intended to initiate liquidation proceedings against the municipality, but eventually they decided to help instead, and they purchased a land area from the municipality for a multiple of the market price. Kehida Termál Kft., was established in 1999, which acquired a license to operate the spa for a period of 50 years. After attaching a 3 hectare property to the old spa it commenced its planned developments\textsuperscript{13}. With this step Kehidakustány was able to start on the road of development, in February 2003 the Kehida Thermal Medicinal and Adventure Spa, which had been renovated at a cost of HUF 2.5 billion, was inaugurated. In 2 years the investment project was assisted by a total of HUF 790 million of non-repayable state subsidies, HUF 640 million of which was won in a thermal-spa tender of the Széchenyi Plan. Beside the indoor and outdoor adventure spa a medicinal center and a four star hotel, a restaurant and a conference hall were also constructed. In the beginning of 2003 this was the only spa with a giant slide. The developments realized the expected result, in 2003 more than 407 thousand spa guests visited (this meant a 165% increase compared to the previous year), and a significant growth was also observable in the number of hotel nights spent (Figure 14).

Figure 16: The trend of visitor traffic in Kehidakustány (2002-2012) based on the number of visitor nights spent
Source: edited by Martyin Z. (2014) based on KSH, TelR

The visitor numbers of the spa have stabilized between 350 and 410 thousand in the past 10 years, the number of visitor nights spent at the accommodations in the municipality was growing all the way till 2009, then a significant drop occurred, and currently the traffic has stabilized at 50 thousand visitor nights spent (which is still six times more than the performance of the first year in 2002!). Similarly to Mórahalom, the area of the spa’s attraction has become regional, moreover it even generates considerable visitor traffic from across the border.

Today the town (and its spa) is far away from bankruptcy, the thermal spa and the hotel provide permanent employment for 150 people, while the number of seasonal employees reaches 50 to 60 persons, thereby unemployment has practically disappeared in the municipality. More than 40% of employees commute to their workplace from within a 10 km distance, which is partially the result of conscious and continuous further training financed either by own
resources or tenders (since as a consequence of the municipality’s agrarian characteristics there was little trained workforce available for the provision of touristic services). The willingness to business in the area has grown, real estate values increased 300 folds. In 2002, visitor traffic related tax revenue was just HUF 1.7 million, in 2003 it was already HUF 4.8 million. The revenue received by the local municipality (business tax, property tax, visitor traffic tax) has also significantly grown as a result of the developments (in 2003 a 41.5 fold increase). The increase of the willingness to do business is also indicated by the continuous growth in the number of private accommodation renters\(^{14}\).

As a result of the multiplying effect of tourism, a significant transformation occurred in the structure of the municipality’s agricultural production based economy. With the help of revenues originating from tourism (indirectly) the municipality managed to stabilize its financial situation, and now has the ability to maintain public institutions and to develop its local infrastructure. Of course, the key to success always depends on several factors, therefore this case can’t be considered a general „scenario” either, however, it can be a good example for developers. What the local people highlighted was that the developments were conscious, well-founded and the cooperation of public and private capital was appropriate (PPP). The development of the spa generated further investment projects, developments, conscious municipality marketing and attraction-improvement have appeared (such as the Deák Kúria\(^{15}\)).


\[15\] http://www.kehidakustany.hu/index.php/latnivalok-kehidakustanyban
8.2.4. The Slovenian model

The “Slovenian model” can also serve as an example. In Slovenia the “spa type” spa development is much further advanced than for example in the spas of the action area which constitute the subject of this study. The Slovenian Natural Spas association was founded as the alliance of 15 spas, primarily with the purpose of establishing the proper place of modern spa culture and its condition-system in the national healthcare system. The emphasis of the development was placed on healthy lifestyle, which on the one hand was based on the several centuries long treatment traditions of thermal cultures, on the other hand on experience in the areas of balneology, thalasso therapy and climatic medicinal therapies. In the course of developing modern services the objective was the introduction of the holistic approach, which made the rediscovery of long-forgotten, ancient treatment methods of distant countries, and their integration into the profiles of spa facilities possible.

Slovenian Natural Spas doesn’t only perform consulting service tasks, rather operating as some kind of destination management organization, it also compiles travel offers, which it promotes and markets on its own home page\textsuperscript{16}.

\textsuperscript{16} www.slovenia-terme.si
Figure 17. The health tourism page of the Slovenian Tourist Board’s home page

Source: www.slovenia.info

Naturally, not only the above introduced organization promotes Slovenian spas, the Slovenian Tourist Board also devotes emphasized attention to the product group on its home page\textsuperscript{17}. However, in the case of Slovenia, even compared to Hungary, a much greater emphasis is placed on encouraging investment on a national level, which can be an example to follow, in the case of the spas in Hungary as well as in Serbia. Information related to this can be found on the home page of the competent ministry (Ministry of Economic Development and Technology)\textsuperscript{18}. From among the thirty project ideas introduced here – in the case of planned large investment projects with complete view-plans – nine are somehow connected to spa development.

\textsuperscript{17} www.slovenia.info
\textsuperscript{18} www.mgrt.gov.si
In connection with Slovenia a rather modern organization is also worth mentioning, the Medical Tourism Destination Management Company, which also has a decisive significance in the marketing of services provided by spas. This company which is fundamentally involved in travel management provides the connection for domestic and foreign tourists seeking medical treatment to the medicinal spas, from the treatment, through travel, to hotel reservations, thereby ensuring the guests that they will receive a guaranteed high quality service 19.

8.3. Cooperation networks in the areas of health and wellness tourism

The modern development of the tourism sector is unimaginable without the establishment of active regional cooperation. The synergies founded on cooperation effectively increase the competitiveness of both the players participating in tourism and the specific region. Several methods exist for the formulation of connection systems, with partially different priorities. The two most typical organizational forms are clusters and complex tourist destination management.

In the survey area of the Spa Development Strategy, of the two mentioned, the former ones have been operating successfully for years, therefore, in the following we discuss the theoretical and practical questions of cluster formation in detail.

19 www.medicaltourism-dmc.com
8.3.1. The concept of the cluster

The meaning of the term Cluster is a network, which involves the concept and practical implementation of cooperation founded on reasonable, mutual advantages for the participants. Companies, institutions prefer operating in a clustered environment, because by the means of this they increase their territorial efficiency, and concurrently with this they may also obtain more exposure, their interest effectuating capacity improves, which significantly increases their competitiveness. Within the clusters partnerships may form between the organizations providing services and the institutions which coordinate and are responsible for development, thereby this networking strengthens the cooperation between the private and public sectors as well.

The formation of clusters can be interpreted as a kind of response to the globalized environment, which is brought to life by the need for development and for the swiftest possible reaction to markets as well as for the enhancement of efficiency.

According to the internationally recognized definition “a regional cluster is the geographical concentration of competing and cooperating companies of a specific industry sector based on an innovative contact network system, including their connected industry sectors, financial institutions, service providing and cooperating infrastructural (background) institutions (education, technical training, research), corporate associations (chambers, clubs). (Porter, M. 1990).”

If we consider not just the definition but also its interpretation, then clusters are such groups of institutions, which:

• Cooperate and compete;
• Are situated in a geographically concentrated manner
• Are specialized in one specific area that is connected by common technologies and technical knowledge
• Are scientifically based or traditional
Clusters absolutely have a positive effect on innovation, competitiveness, expertise, and the flow of information, and they also facilitate growth and long term development\textsuperscript{20}.

\textbf{8.3.2. The cluster as an organization}

For the formation and understanding of the internal operation of clusters, knowledge of their general organizational structure is necessary.

The cluster consists of a general assembly, as the decision making organ, and cluster-management, as the executive organ. By means of the general assembly the members are able to guide the cluster’s operation, and to make decisions regarding the most significant issues. The cluster’s general assembly is comprised of the representatives of members. The general assembly’s task and sphere of authority, among other things are the acceptance and amendment of its own procedures, the determination and acceptance of members’ fees and the budget, the supervision of the cluster-manager’s performance, the admittance of new members or the expulsion of previous ones, as well as disposal over financial resources in excess of a certain value (such as own resources for tenders).

The cluster-management provides the conditions necessary for the organization’s the daily operative functions, prepares the strategic and marketing plan as well as the budget. In the management’s scope of authority are the mapping of tender resources, the systematic notification of members regarding these, the evaluation and classification of project ideas arising among the members.

\textsuperscript{20} Szanyi M. 2008: The improvement of competitiveness with cooperation: regional clusters
8.3.3. Cluster foundation and the creation of membership

It’s expedient for a demand and condition assessment in the circle of potential members to precede the cluster formation, since subsequently it’s possible to formulate the cluster’s range of activities built on this information base, which may be rather diverse from services to investment projects. From a legal point of view, the members express their intention to establish a cluster by the signing of cluster-foundation letters of intent, on the basis of which the organizations deed of foundation and its articles of associations can be drafted. The cluster by itself isn’t a corporate entity, the representation of the organization is performed by the managing agent. The managing agent is an organization selected by the members, which may be a business association, or non-profit organization operating in any legal form.

Subsequently, new members may join the circle of founding members. In many cases the expansion occurs in a referral system and, and the admittance of new members becomes effective by the vote of current members. So-called, sponsor members may also participate in the cluster’s operation (such as municipalities), who/which are not obligated to pay a membership fee, don’t possess a voting right, however, may successfully participate the professional tasks of the network.

8.3.4. The success factors of the fruitful operation of clusters

The operation of clusters can only be successful if the following factors exist concurrently:
• The dominance of initiatives originating from the bottom, and the activity of the private sector should characterize the operation.
• Its maintenance should be motivated by strong, mutual interests, promising business success.
• The cluster shouldn’t be considered by the members as an entity created for the implementation of a single investment project (like a consortium).
• The cluster shouldn’t be formed exclusively for the obtaining of subsidies, just for the purpose of tenders.
• It should be capable of ensuring sustainability (3 to 5 year period).
• There should be cluster services.
• Every member should equally benefit from the positive effects of the projects implemented in the course of the cluster’s operation.
• There should be own resources available for the participation in tenders.

8.3.5. The role of touristic clusters in marketing and quality assurance

One of the emphasized roles played by clustering is to actively participate in the marketing activities of a specific region. The fundamental concept is “competing while cooperating”. A precondition of this is that the marketing activity of clusters should be two way: on the one hand the objective is to establish internal identity, the cohesion of cooperating organizations, meaning strategic marketing, on the other hand marketing activity directed toward outside the cluster, the primary objective of which is the creation of a
common brand, brand-name based on the values represented by the consolidation of the cluster. Brand-name development occurring in parallel with the shaping of the appropriate image makes it possible for the cluster to become such a brand in the long term, which on the one hand represents guaranteed quality on the market with its services, and on the other hand it’s also well identifiable with a geographical location. Cluster marketing becomes an outstandingly significant factor by its latter function in relation to regional marketing.

The cluster is excellently suitable for the shaping of quality assurance systems that play an increasingly important role in tourism, and which can also create a considerable competitive advantage for the participants of the cluster. The quality and the cluster brand built on it unmistakably identify the cluster, on the basis of which the services of the region covered by the cluster’s operation are easily recognizable.

8.3.6. Some characteristics of Hungarian clustering

In Hungary the establishment of clusters has almost one and a half decades long traditions, since the first networks of this type were created in Hungary in the beginning of the 2000s. These pioneer clusters were mainly organized from the top down by the state, and they operated as supplier networks organized around some multinational corporations.

Between 2000 and 2006 already several tender invitations financed partially by Hungarian (Széchenyi Plan, 1st National Development Plan) and partially by European Union sources encouraged the organization of clusters.
From 2007 the New Hungary Development Plan already considered clusters as serious economic development instruments. In the interest of the strengthening of networking and corporate cooperation a complex development program was initiated entitled “Pole Program”, in the framework of which, compared to earlier levels, higher amounts of development resources were announced both for clusters and individual cluster members. The Pole Program-Office, as an operative organization, participated in the accreditation process performing the selection, evaluation of clusters. The result of this work is that by today 20 so-called “Accredited innovational clusters” operate in Hungary. Unfortunately, so far there isn’t a tourism cluster on this list, even though tourism – and within it the health tourism sector – was in the lead in the area of clustering in its first wave.

With the emergence of the New Széchenyi Plan in 2010, the process of cluster development continued, its coordinating function was taken over from the Program-Office by the Hungarian Economic Development Center that was established to replace it, which conducted the revision of the cluster accreditation system.

8.3.7. Health tourism clusters in Hungary

Considering the intensification of competition in health tourism in Hungary and on the international scene, the players in health tourism quickly recognized the competitiveness increasing effect of this type of cooperation. Even though in the beginning the designation of the newly formed networks was ‘industrial cluster’, the tender invitations didn’t prohibit the establishment of tourism clusters either. Thus, as a first, in 2001 the Pannon Thermal Cluster was formed, which was the first organization with these
characteristics not only in Hungary but in Eastern-Central-Europe as well. While examining Hungarian clusters we can also observe that these types of networks operate in the area of health tourism in the greatest number.

The general objectives of the operation of health tourism clusters are the following (Fodor Á. 2008):

- Improving the market position of health tourism service providers
- The development of medicinal-water based health tourism services
- Coordinated product development, which at the same time strives for uniqueness
- The complex development of human resources
- The amplification of international presence on the health tourism market
- The establishment of a regionally integrated organization

The corporate and regional advantages of being organized in clusters can be grouped around the following factors: such are the enhancement of efficiency and competitiveness, the improvement of innovational capacity, cost efficient operation, lower expenditures as a result of cooperative activities (for example in the areas of marketing and technical training).

Of course, beside the number of advantages of cluster operation, there may be factors which endanger successful operation. These include, if this form of networking is excluded from the subsidized areas. It also may mean a potential risk if the clusters lose ground in regional politics, furthermore the lagging of human resources training, or a rivalry with tourist destination management organizations of the region. The establishment of the latter that has been one of the fundamental objectives of Hungarian tourism policies
since 2009, may significantly reduce the number members participating in clusters, since similarly to clusters, the destination management organizations perform professional interest representation as well.

8.3.8. The South Great-Plain Thermal cluster

The South Great-Plain Thermal cluster was a leader in the history of the foundation of Hungarian touristic clusters, however, its operation is not without preceding events. Specifically, in the South Great-Plain region a significant professional association, the South Great-Plain Spa Association, was established as early as 1999. The primary objective of this professional association was still the collaboration of the region’s thermal tourism, the improvement of relations between spas and spa municipalities, the creation of regional cooperation, the preparation of comprehensive studies, preparation and encouragement for developments, moreover the realization of common interest representation, meaning the creation of health tourism which is sustainable in the long term. In December 2003 the Association made a decision to expand the partnership, thus the membership was enlarged to include consulting companies, education organizations as well as new players from the circle of suppliers (thermal camping, medicinal and wellness hotels).

By 2005, the Spa Association had created every opportunity, so by the coordination of its members it could organize them into a modern network, meaning a tourism cluster.

Clustering created a potential for the interested and participating players, for service specialization. Specifically, with competition intensifying both in Hungarian and international comparison, unique and identifiable service development, vertical and
horizontal industry sector cooperation, the creation of a common and up-to-date database in the interest of continuous monitoring became indispensable.

The cluster had a chance to commence its operations in a favorable period, since health tourism was placed on a new development trajectory in Hungary starting in the beginning of the 2000s, as a result of tender opportunities subsidizing the development of this area, as a consequence of which willingness to invest and to do business were stimulated in the sector: new spas were constructed with significant regional decentralization, and older spas were modernized. Between 2000 and 2002 the medicinal and thermal tourism sub-program of the Széchenyi Plan, subsequently from 2007 the regional operative programs of the New Hungary Development Plan, then from 2010 the programs targeted at the development of the Health Industry by the New Széchenyi Plan provided opportunities – with the establishment of financing by way of tenders – for the efficient development of health tourism.

In 2007, the South Great-Plain Thermal-Cluster – recognizing the significance of even more extensive partnerships reaching across regional boundaries – made cooperation agreements with the North Great-Plain Thermal-Cluster, the Vojvodina Health Tourism Cluster, then with the National Spas of Romania.

With the cooperation of the North and South Great-Plain Thermal-Clusters the “Great-Plain Spa” program was restarted. The primary objective of this concept was the creation of a brand for the Great-Plain spa culture on a destination and facility level. The spas which satisfy the criteria required by the “Great-Plain Spa Brand” can receive and display this title after a professional evaluation of their facilities. Great-Plain Spa intends to become such a protected brand, the name of which represents quality even on international markets.
The foreign partners (Romanian and Serbian) also actively participate in the Great-Plain Spa cooperation, so it operates as a real international network.

The contents of the “Great-Plain” Spa cooperation reaching across the border include the following:

- The objective and common interest of the contracting parties is to introduce the health touristic selection of the Great-Plain to the international market.
- The discovery of the unique attributes of Great-Plain Spa, the construction of spas, common marketing activities
- The establishment of an information base, the introduction of a new mutual internet portal.
- The formation of a European model-area for training in the region, for the fields of health and rural tourism.
- The conclusion of agreements in the interest of the creation of a Carpathian-basin Thermal Cluster
- The urging of further cross-border cooperation with the spa associations and clusters of Romania and Serbia with Euro-regional support.
- The development of the “Great-Plain Spa” brand, its introduction to Europe and the achievement of its recognition.

8.3.9. The Vojvodina Spa Thermal-Cluster

The Vojvodina Health Tourism Cluster was established in 2007 in Magyarkanizsa, with the support of seven sub-regions (Óbecse, Zenta, Ada, Magyarkanizsa, Szabadka, Topolya, Kishegyes). The network expanded with new members by 2010, with the joining of the municipalities of Nagybecskerek, Újvidék, Versec, Ürög, Antalfalva, Ruma, Hódság, Zombor, Apatin, Karlóca and Ingyina.
The more significant objectives of the organization’s establishment were the following:

- The cooperation of municipalities interested in health tourism
- Effective health tourism developments
- Common activities for the international representation of the sector’s interests
- Cooperation in the areas of tender drafting and marketing activities
- The improvement of the health tourism “culture” and technical training
- Uncovering EU resources which can be involved in quality improvement
- Nature and environmental protection activity

Of the current members of the cluster, 38 are involved in tourism, 6 are educational institutions, 3 are NGOs, 7 are enterprises, 8 are healthcare institutions, while 9 of them are active with sports and recreational profiles. The significance of the cluster is illustrated by the fact that the number of employees in its operational area is 339,080, of the 533,343 active income earners in Vojvodina. The 3,619 health tourism employees who are active in the cluster’s operational area constitute 28.2% of the employees working in the field of tourism in Vojvodina.

In the Cluster headquartered in Magyarkanizsa professional committees operate in an organized manner (marketing, hospitality industry, education, healing, wellness, economic developments).

**Figure 18. The organization of the Vojvodina Health Tourism Cluster**

*Source: Vörös, A. (2014)*
At the time of the Cluster’s establishment the South Great-Plain Thermal-Cluster that had commenced its operations two years earlier, served as a model, and it assisted in the successful bringing to life of the Vojvodina Spa Thermal-Cluster with theoretical and practical consulting. Nothing proves this better, than the fact that subsequently to the official registration procedure of the Vojvodina Spa Thermal-Cluster, still in August 2007, the two organizations ratified an international cooperation agreement between each other. The fundamental objective of this was the implementation of common marketing actions, training courses, innovations in the area of health tourism. As a part of the listed goals, the introduction of EU standards to the spa facilities in Vojvodina occurred in recent years, along with the establishment of a common database and communication portal, the formation of a training model area in the interest of the introduction and transfer of the best practices.

The intense cooperation of the two organizations made it possible to win several EU tender resources, especially related to the financing of common, cross-border marketing activity.

In the course of the Cluster’s operation, the management had to face several fundamental problems. Such were to following: the members’ lack of interest and the absence of active partnership (common marketing activities, web page operation, exhibition participation), slow and difficult communication, competition-centric view (inability to practice cooperation).

These are all such classic problems, primarily matters of attitude, which presume a change in a way issues are viewed, and which can only be shaped in the longer term in the case if the members experience in the course of their daily work how efficiently the Cluster operates, how the members’ business profitability increases.

Summarizing the history and activities of the two clusters operating in the surveyed area so far, what may be most significantly
concluded is that their establishment was really founded on a professional initiative coming from the bottom, therefore their activities possess real content in such crucially important areas as marketing, training, taking advantage of tender resources, which increase the operational efficiency and professional nature of the health tourism sector to an extraordinary degree, thereby enhancing its competitiveness.

The operational difficulties can primarily be attributed to the lack of capital and the slow change in the way issues are viewed, and they are more strongly present in the operational area of the Vojvodina cluster.

The international cooperation of clusters results in the strengthening and expansion of the cross-border activities of networks, with operative professional content, not only on the level of protocol. Transnational operation assists the renewal of the spa culture of Vojvodina – which is currently lagging a step behind, considering its state of development - and the introduction of the best practices. The greatest opportunity still continues to be in taking advantage of those European Union resources which subsidize the management of common marketing activities, thereby making the simultaneous, effective appearance of the clusters possible on third markets. In this the Hungarian method may still be an example worth following.

There is an extraordinarily great need for the operation of clusters in the region, considering the rapid expansion and professionalization of international supply. In the near future clusters may also become key players in encouraging investment, since they possess adequate professional competence and a system of contacts in the direction of potential touristic investors.
8.3.10. Touristic destination management

Touristic destination management (TDM) is the entirety of those activities, which are necessary in a touristic target area to attract visitors, and to provide them with an experience during their stay in such a way that it will be favorable for the destination as well. In the interest of this the system of tourism in the destination area has to be developed and operated in a sustainable manner. The task of management, beside the formulation of operational and development objectives, is also to direct the activities necessary for the achievement of this. The achievement of sustainability is a fundamental requirement in our days in the area of tourism, and for this conscious development is necessary. One of the instruments of conscious development is planning that also takes into consideration the expectable effects of the activity, and strives to strengthen the positive effects while trying to avoid the negative ones. However, planning only provides a foundation, the plans also have to be successfully implemented, and for this well-prepared experts and organizations are necessary.\(^{21}\)

In light of all of this the construction of a TDM organizational system has to be commenced from the bottom, where the participation of the players is direct – sustainable development can only be achieved by the means of this. Of course, beside the local level, for the more effective performance of certain tasks (such as the development of a complex touristic product) there is a need for the establishment of higher level TDM organizations. Just as with clusters, in the case of TDMs partnership is also indispensable, meaning the inclusion of all players/those affected, since

\(^{21}\) Hanusz Á. (editor) 2010: The place and role of local and regional TDM organizations in rural tourism management
this is what makes it possible that the entirety of the target audience will relate to tourism with the appropriate viewpoint. At the establishment of TDMs professionalism also has to be considered a fundamental principle, since enduring economic success can’t be achieved without expertise. Even though everybody may be a member, in the case of a well-functioning TDM, the performance of management tasks always has to be entrusted to experts. In the interest of ensuring the destination’s competitiveness, there is also a need for a sufficient amount of capital, therefore money is also a fundamental pillar of the TDM system\textsuperscript{22}. The spas in the action area of Cooling Cubes can only take strategically substantial steps by the establishment of a TDM. Beside the operation of existing clusters, particular care must be taken, so the operational efficiency of those will not be jeopardized by the TDMs.

\textbf{8.4. Planning Techniques}

In order to be able to formulate recommendations for the development of CC project, first of all, we have to get a comprehensive picture of the developments, which are currently ongoing in the program area affected by the project, as well as the theoretical programming frameworks determining these developments.

It’s expedient to perform the comprehensive analysis in such a way that the received data, information will be interpretable and understandable, even by the determining viewpoints of the European Union’s development period between 2014 and 2020. A complex approach is particularly justified, since between 2014 and 2020, there will be opportunities for the implementation of

\textsuperscript{22} Lengyel M. (editor.) 2008: TDM Operational Handbook
complex development programs in the framework of so-called Integrated Territorial Investment – ITI. Integrated Territorial Investment is such a new system of instruments, by the means of which those resources can be combined that can be taken advantage of for the financing of operational programs, which possess several priority axis, are multi-dimensional and span across sectors. Thereby the four funds of the Common Strategic Fund – the European Regional Development Fund, the European Social Fund, the European Agricultural and Rural Development Fund, the European Fishing Fund – can be utilized (these are the ESB funds – European structural and investment funds).

In connection with integrated regional investments two new development techniques are worth mentioning.

**Integrated Territorial Investment**

In the case of ITI it’s fundamentally important to formulate an integrated development strategy involving several sectors, which is targeted at the development needs of the affected region. The strategy has to be formulated in a way that the measures should be built on alliances created in the course of the coordinated implementation.

ITI together with all of these can be an ideal instrument for the subsidy of integrated measures in a specific region, because it makes the combination of subsidies with different themes possible, including the combination of subsidies for priority axis and operational programs subsidized by ERFA, ESZA and the Cohesion Fund. This approach also favors complex spa developments, because it may assist in the concentration of resources.

Any geographical area may constitute the subject of ITI, from the vicinities of a city, to urban, metropolitan, city-rural, regional
and inter-region levels. It can even be applied in the case of geographical areas, which are within a specific region, which possess similar characteristics but are separately located (such as networks consisting of small or medium sized towns), to facilitate the harmonization of measures. It’s not necessary for an ITI to cover the entire area of an administrative unit – in conformity with this, it may be used in the framework of European regional cooperation projects (ETC). Of course the interventions planned as ITI also have to conform to the priorities of applied Operative Programs. From the financing side, the instrument makes the involvement of ESZA, ERFA and KA sources equally possible.

**Community-Led Local Development**

From the point of view of future developments, community-led local development (CLLD), a development program which manages the town and its surroundings as a unit, may also be of emphasized significance. This technique is built on the LEADER viewpoint - which has been functioning in the EU since 1991 - and its rural development successes. Its areas of application are the sub-regional levels, they supplement other development subsidies on a local scale. Its objective is the mobilization and inclusion of local organizations, while keeping in sight the objectives of the Europe 2020 strategy (intelligent, sustainable and inclusive development). Its fundamental components include the local action groups, which are already known from the LEADER programs, (which have to consist of persons representing the social-economic interests of the local civic community and the private sector, in such a way that the partners representing the civic and private sector have to possess at least 50% of the decision making votes and no interest group
can possess an absolute majority of the votes), and local development strategies. The objective of the latter is to determine local development needs and regional potentials, to present the goals and the action plan of the strategy.

In comparison with the previous program cycle, it’s considered to be new that the uniform methodology of community-led local development has to be applied in relation to every fund and the regions; the subsidies originating from European Union funds will be uniform and harmonized; and various financial incentives will be built in as well. It belongs to among the latter that in the case of those operative programs where an entire priority axis is implemented through CLLD instruments, the maximum financing ratio provided by ERFA-ESZA increases by 10 percentage points. In the case of EMVA resources the maximum amount is 80 to 90%, while in the case of EHA 75%. In the cases of ERFA, ESZA and EHA, CLLD is optional, however in the case of EMVA its application is mandatory.

Between 2014 and 2020 an unquestionably fixed indicator structure, and in parallel with that continuous monitoring activity will be crucially important in the efficient utilization of European Union resources. Local, from the bottom up organizations may have emphasized significance, which in specific cases may manage the implementation of independent development projects, with comprehensive or partial decision making competence.
9. Definitive development directions

9.1. Urban development – Regional development

Having a view at historic events we can conclude that continuous migration has been typical in Vojvodina up to this present time. In Hungary, more prominent migration has been a new factor typical only in this past decade. Population migration may derive from various reasons, the most prevalent of which is economically motivated migration, in hope of better living and provisions for self and family, although migration for the purpose of studying is also significant.

The 2007-2013 European Union planning period has ushered in a new era in the area of urban development in Hungary. It was clear already at the phase of planning the operative programs that location and resources for the developments related to city level communities would be provided by the regional (location based) programs rather than those based on industry and sectors. During the development of the internal content structure of the regional operative programs such priority structure formulated eventually in which urban development emerged as a distinct development topic. Although the term is not applied consistently for each region and does not clearly correspond only with urban development in each case, it can be stated from the aspects of both the content and the resources allocated for this purpose that urban development has emerged as a salient area.23

It can be sensed that “a fierce competition is taking place between the larger cities for the various resources (capital, businesses, skilled labor, community-level investments, etc.). The cities that wish to stand their ground in this area also must strengthen

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their competitiveness. This includes that the city must be an attractive potential residence, site of investment (attracting capital), and tourist destination, etc.; and above all, it must become capable of acquiring, maintaining and enhancing the regional functions. For the improvement of the competitiveness of the businesses, it is necessary to develop their local-regional “environment” determining their operation.”

This situation is further complicated by the fact that in Serbia and Vojvodina—with the exception of the aforementioned communities—the majority of cities can be considered dynamic only in that their populations are decreasing. It promises to be the perplexing development conundrum of the next decade how regions with decreasing population can be energized with “shrinking” cities.

The peculiarities of the Serbian public administration and municipality system—whereby the community (opstina) concept includes several villages—practically necessitates that the tools of region and country development and those of community development be used simultaneously. This necessity luckily corresponds with the methodical intentions of the EU. In this way, Serbia may be a convenient field for the application of the new EU methods.

### 9.2. Project development directions

The recommended strategic development directions of the existing spas may be the following:

- The improving and development of operation safety (water safety, water usage, and energy efficiency improvement projects outside comprehensive reconstruction. We emphasize the necessity for cost-saving directed water engineering, energy and general reconstruction in most facilities.

24 Laying the Foundations for the Joint Development of the City Network of the South-Plains Region I. DARFÜ 2012.
• The development of the supply and service system (medical, beach and wellness spa developments, and quality improvements). In both countries, particular emphasis must be placed on the development of medicine and the expansion of the scope of medical services, as these services attract wealthier visitors from a wider area non-seasonally. The dilapidated state of hospitals also necessitates immediate reconstruction.
• Human resources development and training
• Marketing development
• R&D
• Development of medical facility infrastructure. In the cases of the major ones, especially those of Kiskunmajsa and Mórahalom, they need to be upgraded to medical site status and the series of connected developments (such as green-area developments, programs based on water and irrigation, and climate related activities).

Ideally each of the above developments should be carried out in all of the operating baths. However, keeping reality in view, we can propose the following, during the period of 10 years:
• Comprehensive reconstruction must be carried out in the facilities which are in extraordinarily poor condition;
• the development of spa and wellness services is of high importance, but medicine must also be brought up to par in the major facilities; the revenue from medical services should amount to 25-30% in these spas;
• in the major facilities quality developments, human resource developments, R&D developments must be emphasized, and the upgrading of certain spa communities (e. g. Apatin, Magyarkanizsa, Mórahalom, Kiskunmajsa) into complex medicinal facilities is not unfeasible either.
Therefore, by 2024 of the already existing facilities the flagships of the spa development can be Mórahalom, Kiskunmajsa, Szeged (Anna Bath and Napfényfürdő), Makó, and Tiszakécske on the Hungarian side, and Kanizsa and Apatin on the Serbian side. For these facilities at least a 30% admission ticket and revenue increase may be a target in addition to a 20% headcount increase. For this, in these facilities the involved development resources must exceed 2 billion forints by 2024 (6.5 million euros, 750 million din) exclusive of the hotel developments. In addition, on the Serbian side, it would be well worth thoroughly reconstructing some of the specialty medical hospitals (e. g. Bezdán, Novi Sad, Zalánkemén). The water parks further developed may be an interesting highlight of the Bácska (Petrőc, Zalánkemén). In relation to the water parks, the effects of climate change that particularly impact the region (e. g. prolonged summers, frequent heat, drought) are a short-term advantage. It must definitely be set as a goal that the existing spas should operate profitably by 2024, for which the operating framework and morale must both improve on the Serbian side.

The new spa developments must also be mentioned, together with the hotel developments that may be linked to them. Based on the conditions and the already existing plans, it is primarily realistic in Serbia, in the villages (communities) of Palics, Magyarkanizsa, Zenta, Ada, Óbecse, Temerin, and Zombor, Apatin, Bezdán. In Hungary, no potential new spa constructions are foreseeable; however, in terms of hotel developments, the facilities of a few spas around the dunes area (e. g. Kiskunhalas or Kiskunmajsa) and the wellness communities by the Tisza (e. g. Lakitelek, Tiszakécske, or perhaps Csongrád) may set off on a course of faster development or may become more profitable. In addition, we would like to point out that smaller or greater camp site developments can be carried out in practically any community, which, in the case of the larger spa areas, may translate to a potential source of significant revenue.
9.3. Proposals for new marketing

A larger marketing expense is entailed also in designing, developing and setting up websites for the spas, although most facilities publish their information on the official web page belonging to their city. The involved expenses depend on the amount of uploaded data and the complexity of the web site, and in less complicated cases it can be accomplished from a few hundred thousand forints. It is very important that the website should be available in several languages.

Online ticket purchase option has not been set up by any of the facilities, although its significance may become more important in the future. Even more important is presence on the online community sites, which has become all but indispensable by now, particularly when targeting the younger audience. Maintaining and updating online content can be best accomplished under the supervision of the spas themselves.

Google services offer the possibility to publish facilities on its maps; only a simple registration is required, and the service is free of charge. The source code of the map containing the given facility can easily be imbedded into the code of the website.

The success of online marketing campaigns may be increased with search engine marketing campaigns, as a result the spa can be present on various portal sites. For example, with the Google AdWords service you can define keyword search terms. Detailed information and free study material about this can be found on seotools.hu. For example, when entering the term “spa,” the JonaThermál Kiskunmajsa spa is listed in second place among the paid ads of google.hu, which indicates serious online marketing activity.
Table 7: The most important, potential development project types for the studied, already existing facilities

(Note: We make the following recommendations as outside specialists; they do not reflect the baths’ views.)

<table>
<thead>
<tr>
<th>Full name of spa</th>
<th>Improving, developing operating safety</th>
<th>Developing supply and service system</th>
<th>Medical Services developments</th>
<th>Pool, wellness- and water park developments / pleasure features development</th>
<th>Quality developments (e.g., beauty, local products, access systems, etc.)</th>
<th>Developing human resources and professional standards, training programs</th>
<th>Marketing development: independent baths marketing program</th>
<th>R&amp;D, medicinal and water effect research programs</th>
<th>Water safety and water usage projects</th>
<th>Medicinal site infrastructure development</th>
<th>Energy efficiency projects</th>
<th>Potential development of health tourism hotels</th>
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<tbody>
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<td>Thermal Bath Ásotthalom</td>
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<td>Swimming Pool and Spa Csongrád</td>
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<td>Kecel Spa</td>
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<td>Kecskeméti Water and Slide Park</td>
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<tr>
<td>Location</td>
<td>Kiskőrös Thermal Bath and Training Pools, Camp Site</td>
<td>City Pools, Kiskunfélegyháza</td>
<td>Halasthermal Baths</td>
<td>Jonathermal Medicinal and Pleasure Baths</td>
<td>Kistelek Thermal Baths</td>
<td>Kunszentmiklós Pools and Baths</td>
<td>Tőserdei Thermal Bats</td>
<td>Thermal- and Medicinal Baths Makó (Onionarium)</td>
<td>Szent Erzsébet Mórahalom Medicinal Baths</td>
<td>Szeged Anna Baths</td>
<td>Sunshine Baths Aquapolis Szeged</td>
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<tr>
<td>Ásotthalom</td>
<td>thermal baths</td>
<td>Reconstruction and services extension. Making one or two open pools indoor or semi-covered pools.</td>
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<tr>
<td>Csongrád</td>
<td>medicinal baths</td>
<td>Reconstruction and reinforcement of the medical department, the development of wellness services. If possible, a complex technical and energy reconstruction and development would improve a lot in the baths’ situation; the bath has lost the approved funding of the New Széchenyi Plan, unfortunately, because of too many delays.</td>
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<tr>
<td>Kecel</td>
<td>thermal pools</td>
<td>Alkaline hydrogen carbonate medicinal water containing bromide and iodide also offers a great medical opportunity after a bath reconstruction. For the cost-effectiveness of development, the use of thermal energy and agricultural potential should be kept in mind, because this will significantly reduce the investment time.</td>
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<tr>
<td>Kecskemét</td>
<td>pleasure spa</td>
<td>In order to develop the medical department it is essential to attract more foreign visitors. A goal can be to achieve the development together with the leisure park.</td>
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<tr>
<td>Kiskőrös</td>
<td>thermal baths</td>
<td>Expansion of camping facilities. Winter-wing expansion, increasing the built-up area. Sustainable energy management to reduce expenses. Building saunas.</td>
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<tr>
<td>Kiskunfélegyháza</td>
<td>thermal baths</td>
<td>Expansion of services, strengthening wellness function. Building services related medicinal water.</td>
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<td>Kiskunhalas</td>
<td>medicinal baths</td>
<td>Development of outdoor swimming pools and greater shading of open resting areas. Expanding recreation services in the camp sit (bike rental). Medical services expansion. Family-friendly program options.</td>
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<tr>
<td>Kiskunmajsa</td>
<td>medicinal baths</td>
<td>Establishment of adventure park on free space, expansion of adventure elements. Higher quality hotel development. Qualification to medicinal site required, which started in 2014.</td>
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<tr>
<td>Kistelek</td>
<td>thermal baths</td>
<td>Medical services have been offered at the spa since 2004. Efforts for the variability and quality improvement of the services. The hotel in the immediate vicinity of the spa strengthens the spa’s the position.</td>
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<tr>
<td>Kunfehértó</td>
<td>thermal pools</td>
<td>Much more efficient and consistent marketing is required (website, social networking, promotions, etc) for the bath's success. The development of free space to accommodate 5,000-6,000 people was launched in 2010, with the help of EU grants. Following the renewal of the lakeshore, construction of a leisure and theme park should be considered, as this area is the most suitable in the region for such investments.</td>
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<tr>
<td>Kunszentmiklós</td>
<td>thermal pools</td>
<td>The interacting supporting effect can be seen between the thermal baths and camping operating as part of the Miklóssy János Sports Center, but in addition to emphasizing the sport, following a reconstruction, a direction should be taken towards a baths development serving the needs of the older age groups. More emphasis should be placed on the medical services, and wellness elements, as sauna development possibilities, should not be ignored. The quality improvement of the camp site is crucial.</td>
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<tr>
<td>Lakitelek</td>
<td>leisure center</td>
<td>The Tőserdő touristic center is a valuable example of the interacting supporting effect of the baths and the theme park. The complex offers real recreation primarily for the younger age group, as the various touristic attractions mainly serve active recreation. In addition to the thermal baths, the theme park and the row boating offer the basis of a few-days’ stay. The recreational activities and the hotel capacities should definitely be increased in the developments.</td>
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<tr>
<td>Makó</td>
<td>medicinal baths</td>
<td>The investment consuming huge costs has made sustainable operation difficult. Great emphasis should be placed on the rationalization of the energy-wasting indoor spaces, in order to ensure that smaller percentage of income from ticket prices need to be spent on energy purposes. The impressive image of the baths is unquestionable, but it seems clear that the return on investment calculation was incorrect.</td>
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<td>Mórahalom</td>
<td>medicinal baths</td>
<td>The future potential only makes possible the vertical expansion, for the most part, and the only way which service expansion is possible while keeping open space area. The Small-Region Health Center can be found on the area of the baths, which strengthens the medical significance of the baths. There is a demand for the further expansion of the sauna world in the future plans, as well as the modernization of the water engineering units. Qualification of the baths as medicinal site would be very important, and measuring will begin in 2013.</td>
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<td>Szeged Annafürdő</td>
<td>medicinal baths</td>
<td>Due to the space limitations of the baths, mainly the quality improvement of the services can be expected. No significant increase in the number of visitors is expected, even maintaining the present number is a challenge.</td>
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<td>Szeged Napfényfürdő</td>
<td>medicinal baths</td>
<td>Napfényfürdő, with a direct connection to a major hotel, has significant services in the wellness facilities. In addition, the health and wellness services should be developed.</td>
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<tr>
<td>Tiszakécske Tisza-part</td>
<td>medicinal baths</td>
<td>The management of the baths pays great attention to keep the guests around for a few days, which is further strengthened by the suites available nearby. A connected, several-stars hotel is being built.</td>
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<tr>
<td>Tiszakécske Kerekdomb</td>
<td>closed in 2013, reopening in 2014</td>
<td>The baths open, renovated, on 17 May 2014 with new services. Near the pools, the Kerekdomb Thermal Park Resort can be found, with thermal water, hotel, sports and entertainment.</td>
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<td>Ada</td>
<td>resort</td>
<td>Among the goals set to be accomplished till 2016 are the establishment of a thermal water well, the renovation of an Olymic-size pool, the partial roofing of the facilities, and building a 7-7.5 m slide. Financing of the project would mainly be accomplished from own resources, since Serbian subsidies are not very predictable. The goal is the extension of the opening hours.</td>
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<tr>
<td>Apatin</td>
<td>wellness baths</td>
<td>The bath needs material reconstruction investments. This may be possible from the Vojvodina Territory Assistance Fund. Long-term plans may be upgrading to medicinal site status.</td>
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<td>Petrőc</td>
<td>aquapark</td>
<td>The private owner may develop the bath to a year-round aquapark.</td>
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<td>Bajsa</td>
<td>pools</td>
<td>The goal is the renovation of the existing, and building of new pools.</td>
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<td>Óbecse</td>
<td>sports center</td>
<td>A project that was discontinued is awaiting completion, for which the municipality is looking for strong investors. According to the plans, an independent wellness and hotel would be built on the 78 hectares. The (medicinal) water, with iodine content, offers a great opportunity to build medicinal and medical services.</td>
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<tr>
<td>Bezdán</td>
<td>medical hospital</td>
<td>A project that was discontinued is awaiting completion, for which the municipality is looking for strong investors. According to the plans, an independent wellness and hotel would be built on the 78 hectares. The (medicinal) water, with iodine content, offers a great opportunity to build medicinal and medical services.</td>
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<tr>
<td>Magyarkanizsa</td>
<td>medical hospital</td>
<td>General reconstruction and 2-3 suites are in the plans, for meeting the demand of more sophisticated patients.</td>
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<tr>
<td>Újvidék</td>
<td>medical hospital</td>
<td>In the facility currently operating as medicinal baths, favorable medical opportunities are available. The comprehensive development of the facilities, along with connected hotel, may be the next goal.</td>
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<tr>
<td>Zombor</td>
<td>pools</td>
<td>The operation and development of the medical hospital is under the responsibility of the state. Its reconstruction seems unavoidable.</td>
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<td>Zalánkemén-Horizont</td>
<td>pleasure spa</td>
<td>Complex pools reconstruction is feasible.</td>
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<tr>
<td>Zalánkemén-Dr. Borivoje</td>
<td>medical hospital</td>
<td>A long-term goal of the baths may be to become a year-round operating facility.</td>
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<tr>
<td>Temerin</td>
<td>pools</td>
<td>Operating and developing the medical hospital is currently the state’s responsibility. Developments related to medical services are the most needed. Long-term goal is upgrade to medicinal site.</td>
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<td>THE COMMUNITY MAY BE ABLE TO IMPLEMENT A SIMILAR PLAN (NEW POOLS, WELLNESS FEATURES, DEVELOPMENT OF ROOFING), PARTLY FROM OWN FUNDS PARTLY FROM OWN RESOURCES.</td>
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10. Expected planning and resource options

10.1. European Union resources available to Serbian applicants

Unlike to Hungary, EU funds are available only to a limited extent to the Republic of Serbia at this time.

With the use of the available EU assets the possibility is offered for the gradual, significant development of the villages. This refers to the utilization of resources that were allocated to the Republic of Serbia within the framework of the annual national programs. Depending on the planned activities, the Instruments for Pre-Accession Assistance – IPA – are used for the implementation of the programs.

Serbia currently can take advantage of the assets of two components of the IPA program (assistance related to transition and for institution building, and assistance to support cross-border co-operation). This project was realized from this latter assistance also, and the reinforcement of cross-border co-operation and similar initiatives could be crucial in terms of future development.

A basic requirement for using IPA components III, IV, and V was obtaining member candidate status, as well as proof that a decentralized system guaranteeing fair disposal of the assets is in place. Preparations for the use of IPA components III and IV are not only related to using the assets of the funds, but, rather, their primary purpose is to prepare Serbia - a future EU member state – for the planning and management of the use of the possibilities offered by the Structural Funds and the Cohesion Fund after they become available for Serbia after the accession.

Currently four cross-border cooperation programs and two international and inter-regional co-operation programs are running, in which the users located on the area of Vojvodina can co-operate
with Hungary, Romania, Bosnia-Herzegovina, and Croatia, as well as participate in the Adria program and in the “South-East Europe” program.

During participation in the local and regional programs long-term personal relationships are formed between people and communities living on all sides of the borders, which become bases for further joint activities and developments. Additionally, in the process of learning about the project, during the activity directed to obtaining the earmarked assets, the Serbian partners can gain useful experience related to use of the EU funds, since the tender publications and the evaluation of project plans are already carried out according to the rules related to outside EU assistance.

Among the projects eligible for assistance are minor size cross-border utility developments, economic joint-ventures, and projects related to environmental protection, tourism, cultural activities, agricultural development, education, research and development activities, employment enhancement, co-operation between institutions, and elaboration of the development project documents.

The **EU programs** contain such integrated measures, which strengthen co-operation between the EU member states. These programs are linked to the effectuation of European policies (with specified deadlines). EU programs are financed from the common budget of the European Union; i.e. from assets that have been earmarked for the main sectors, e. g. environment, energy, transportation, business development, and the enhancement of competitiveness.

Until 1997 community programs could only be used by EU member states. In 2003, however, at the congress of the European Council held in Saloniki, the aforementioned programs were made available – along with an appropriate model for new users – for West Balkan states also. Users from EU member states do not have
to provide their own resources, as for them participation fees are provided from the budget; at the same time, users from candidate member states and future candidate member states are required to provide proof of existence of their own resources also. The portion of the own-resources that the Republic of Serbia pays for participation in EU programs may be covered by the IPA.

The Republic of Serbia participated in the implementation of the following EU programs:

- Seventh Framework Programme for Research, Technological Development and Demonstration Activities - FP 7;
- Culture 2007
- The Competitiveness and Innovation Framework Programme – CIP EIP;
- The Competitiveness and Innovation Framework Programme;
- Fiscalis;
- Customs;
- Progress;
- Life Long Learning Programme;
- Safer Internet Programme.

The Participation in the Health and the Europe for its Citizens programs began subsequently.

**10.1.1. Europe 2020 strategy**

Implementation of the Partnership Agreement is carried out by the EU development policies under the condition that the planned developments included in it support one or more EU objectives derived from the Europe 2020 strategy

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25 Tervezet Magyarország Partnerségi Megállapodása a 2014–2020-as fejlesztési időszakra
In the framework of the Partnership Agreement the European Union makes assistance for the following thematic target areas available in the 2014-2020 planning period – covered by the EU funds (ESB funds):

1: Strengthening Research, technological development and innovation
2: Access to ICT, improvement of its use and quality
3: Improvement of the small- and medium-sized enterprises, the agricultural sector (as part of the EAFRD) and the fisheries and aquaculture sector (within the framework of the EMFF) competitiveness
4: Support of transition towards low-carbon economy in all sectors
5: Adapting to climate change, promoting risk prevention and management
6: Promoting environmental protection and the efficiency of resource use
7: Promoting sustainable transport and elimination of bottlenecks in key network infrastructures
8: Promoting sustainable and quality employment, and worker mobility
9: Strengthening social cooperation and the fight against poverty and discrimination
10: Investment into education and training, including vocational training, for developing skills and with a view to lifelong learning skills
11: Improving the institutional capacity of public authorities and concerned parties and its contribution to effective administration
10.1.2. Integrated approach to territory based development, supported by the ESB funds

Based on the experience of the 2007-2013 cycle, the advancement of the developments implemented in a regionally decentralized manner, with the involvement and under the responsibility of local development actors, is expressly advantageous; while the integration of the developments, on the other hand, can still be improved. Therefore, the regionally integrated approaches will still need to be applied in the 2014-2020 program period, along the principles defined in the EU Territorial Agenda. The institution and tool system of the developments must also serve the regional decentralization. In the 2014-2020 programming period the NUTS3 level counties represent the most important platform for the decentralized territorial development, in line with the recently completed transformation of the regional administration. Based on the evaluations of the 2007-2013 period, parting from the tender competition system of the allocation of resources between regional players, in the 2014-2020 period the regional development actors will have a source limit of a predetermined amount with a view to the implementation of the developments with a strategic approach and in a manner integrated in space and time.

The territory based developments are included, on the one hand, in integrated regional operational programs according to region-based logic, and on the other hand in sectoral operational programs. The former receive the decentralized territorial developments, while regional developments of national importance take place in the central implementation or coordination of the latter, financed by one or more OP funding.
Criteria of the designation of developments to be treated regionally decentralized:

- Interventions of small-scale, local and regional importance.
- Developments that can be handled optionally on county or local level based on the principle of subsidiarity.
- Developments in response to unique local social need.
- Developments connected to community and county municipality assets.
- Sectoral developments that are effectively implemented based on local community or largely depend on local conditions.
- Sectoral developments that are effectively implemented or largely depend on local conditions.
- Integrated interventions may be implemented in response to regional development needs that generally involve several sectors.

The indicative list of topic areas to be treated regionally decentralized and ESB fund:

- Regionally decentralized economy development and employment promotion (ERDF) that focuses on (1) economic organization of local interest, (2) job creation, (3) operates with integrated interventions. Support for local and community alternative economic development initiatives and co-operations on county level: support for development, production and marketing of local products and services, development of local product clusters, reorganization of local markets, development of connected institutional environment. Support for municipal business infrastructure developments (also covering the provision of transport connections). Infrastructure
developments of product preservation solutions to support local employment

- Integrated community development (ERDF) development of attractive community environment for business operators (urban development promoting economic activity, employment (commute) and touristic activities in urban development), and preparation of the communities to climate change and demographic challenges (climate-friendly economic development, rehabilitation of brownfield and derelict urban areas, community environment development)

- Small-scale alternative, communal and sustainable community transport development (ERDF);

- Public services and public infrastructure development, family-friendly aspects belonging

- Public service and community infrastructure development having regard to family-friendly criteria, the social urban rehabilitation (ERDF);

- Integrated county level complex touristic appeal development and small-scale thematic touristic developments based on endogen resources (ERDF);

- Municipal and community energy (renewable and efficiency) developments (ERDF);

- Small-scale, ESF-based initiatives of local-regional importance by the local public sector or the communities, primarily in support of the promotion of employment and social co-operation – these form projects pre-specified in the decentralized development packages and are connected to their ERDF elements. ESF resources may also be important financiers of interventions implemented with the methodology of community driven and such types of developments (CLLD).
The measures that ensure an integrated approach to the use of ESB funds - Community Driven Local Development (CLLD)

The most important challenges, target groups, and topic areas to which the application of the CLLD asset is directed:

- Local community participation in the development processes, civic activity, and co-operation between the sectors are weaker than in Western European countries.
- In most regions of Hungary - including cities, towns, and especially rural areas - the local economy needs to be strengthened and reorganized.
- High number of extreme and child poverty, low levels of social integration of disadvantaged social groups and the Roma.
- Due to their regional significance, the community and cultural infrastructure of the cities and their services are also important on the city-regional scale; the related methods and forms of community involvement need to be strengthened.

**Integrated Territorial Investments (ITI)**

With the ITI asset, Hungary supports the management of the regional problems and the utilization of its regional development potentials. By using this asset, it is possible to ensure that more basic or more operational programs also serve a regional integrated intervention package. The ITI device can support both the decentralized territorial developments (counties, cities) as well as nationally important, centrally planned and executed or coordinated major regional development interventions.

Integrated regional investments are implemented on the level of the counties, towns and county-level cities and Budapest. The
decision-making bodies set programs of specific subject matters for previously known resource amounts to which the ERDF and ESF funds contribute.

The **LAU 1 regional development packages** focused on community development contribute to the county integrated development projects. They have their own preliminary resource allocation, which is set by government decision.

In implementing the 2014-20 period, in the light of experience, the resources of other programs (sectoral operational programs) and funds may join the regionally decentralized ITI initiatives, in line with the procedures established under NZEC.

10.1.3. **The main priority areas of cooperation within the ESB funds**

Hungary participates in bilateral cross-border cooperation programs in the 2014-2020 period. For cross-border programs, operative cross-border programs along the inner border of the EU should be distinguished from programs across the Hungarian-Serbian border covered by the Instrument for Pre-accession, because of the different financing funds. In line with the National Development 2020 (OFTK) strategic priorities, on the Hungarian side in relation to regional cooperation the support of the following main areas of cooperation is needed:

- economic development, promoting competitiveness and employment by cross-border co-operation;
- supporting regional integration along the border by strengthening the environmental, transport, water, and energy networking connections;
- promoting institutional cooperation and improving the relations of communities along the border.
Cross-border and transnational programs, and selection of thematic objectives and investment priorities are accomplished together between neighboring countries. In defining the objectives of the cross-border programs, the county development concepts developed in accordance with the OFTK also play important roles.

The following areas have been designated by Hungarian Government decree No. 1441/2013. (VII. 15.) as development goals of salient importance for cross-border cooperation:

a) economic development (in particular the development of SMEs and R & D & I development)
b) eliminating missing transport links,
c) promoting employment,
d) environmental protection and energy efficiency (for the 5. thematic purpose), and
e) institutional development.

In case of trans-national programs, the establishment of a direct connection with the EU Danube Region Strategy (EUDRS) may fundamentally determine the program level goals.

As a joint initiative of Hungary and the European Investment Bank it supports the coordinators of the priority areas and the involved organizations of the Danube region countries in the preparation and financing of the projects linked to each area. The BDKP supports the preparation of a number of macro-regional projects in the areas of building the missing transport links and eliminating traffic obstacles, designing and coordinating the flood-control developments on catchment and sub-catchment levels, the coordinated implementation of energy developments, and developing cooperation mechanisms to facilitate cross-border cooperation. The Danube region countries appoint temporary experts to the organization of the BDKP for the joint preparation of the
macro-regional projects, shared analysis of experience and good practice, exchange of knowledge, developing long-term partnerships, and the most efficient use of the opportunities provided by cooperation between the countries.

10.2. Source map

Partly similar and partly different financial instruments are available in Hungary than in Serbia, as our southern neighbor is not yet an EU member state; therefore, primarily municipal, provincial and state and, in part, the EU pre-accession funds are available there. The market opportunities can be considered nearly identical in the two countries.

10.2.1. Own resources

For the baths operating profitably there is an option to finance minor developments from in-house financing; in principle, a few hundred thousand euros can be spent annually as necessary on additional development.

10.2.2. Private investments

In connection with the baths several private investments can be realized by 2020. To the bath industry are connected e. g. the private energy investments (e. g., using the ESCO designs), the investments of the tenants of the baths (e. g., current assets, site improvements).
In particular, hotel developments (hotels, camping sites) may fundamentally affect the future position of all of studied facilities. Currently major hotel developments are taking place e.g. in Makó and Tiszakécske, and preparations for hotel constructions are also underway in Lakitelek. We can foresee chances for building more hotels in the next 10 years on the Hungarian side, especially around the larger baths (e.g. Kiskunmajsa, Kiskunhalas, Mórahalom). The hotel constructions may gain impetus mainly along the Tisza and in the Zombor-Apatin-Bezdán triangle in Serbia. Camp site developments may take place essentially in the vicinity of the baths mentioned in the study.

10.2.3. Funds

In the development and planning policy of the EU, the main development objectives are the effort for sustainability, increasing employment, and starting and maintaining economic growth. During the 2014-2020 budget period the largest share of EU funding will be allocated to the activities which help achieve these objectives. It is important to take these factors into consideration, since in Hungary their direct effect is significant; and, they are becoming relevant in Serbia as well, thanks to the increased resources from Brussels.

Assistance is divided into two main groups: non-repayable and repayable assistance. The various forms of financing can be obtained in different ways: some through the national institutional system, others through non-Hungarian/Serbian institution system. Since Hungary is a European Union member state, the majority of the financial instruments used are finances of EU origin, but funding opportunities outside the EU are also available.
10.2.4. Non-repayable funds

Many types of non-repayable funds is available in the two countries today. Best known are EU funds, of which the most relevant are the structural and cohesion funds, the CBC resources, and pre-accession funds. In addition, other funds also exist outside the European Union, made available by some organizations and countries. The European Commission makes direct financial contributions in the form of funds to promote projects and organizations that contribute to an EU program or policy.

In addition to these resources, it is possible to apply for the resources of the assistance schemes by the Norwegian Financial Mechanism and the Swiss Fund. These primarily include environmental-industrial environment assistance, which must be applied for directly to the institution providing the resource.

10.3. Hungarian funding resources (indirect resources)
2014-2020

The amount of HUF 7,080 billion to be used by Hungary between 2014 and 2020 is equivalent to 3.6 percent of the gross national income (GNI).

Hungarian bath developments plans may be financed to lesser or greater extent from the next four national operational programs:
1 GINOP (Economic Development and Innovation Operational Programme)
2 TOP (Operational Programme for Regional Development)
3 KEHOP (Environmental Protection and Energy Efficiency Operational Programme)
4 EEFOP (Human Resources Development Operational Programme)
Based on the assistance map, in the Southern Great Plain region the expected assistance intensity will be 50% for income-generating projects. The assistance rates expectedly may be increased by 20 percentage points in the case of small enterprises and 10 percentage points for medium-sized enterprises and by.

**GINOP**

From 2014 the Hungarian health tourism development supports mainly the complex public medical site developments. For baths not situated on medicinal sites there is lesser possibility from the GINOP. This will be true for sites and attractions developments, for complex public area medicinal site improvements and TDM developments as well. All this is enshrined in the plan for the period 2014-2020 of the GINOP (Economic Development and Innovation Operational Programme).

Measure 1 of the 4th GINOP priority axis deals with the local medicinal site developments:

“The integrated development of medicinal destinations and related services”.

Major facility developments, the national R & D activities (e.g. national importance R & D related to medicinal water) and larger enterprise developments can be funded from the GINOP.

**TOP**

The Regional Development OP supports minor interventions and may also be considered an economy recovery tool in the case of private company projects. In terms of the facilities, more serious
potential lies for regional research, balneology, community development, marketing, or business development TOP projects.

**KEHOP**

The Environmental Protection and Energy Efficiency Operational Programme can be the basis of energy efficiency and associated energy reconstruction programs.

**EEFOP**

The Human Resources Development OP can create the foundations of human resource development and organizational development, in addition, the healthcare developments will be financed with the OP also. For the South Plains discussions should be initiated with the health ministry in connection with the complexes for medical tourism development.

**10.4. Serbia resource map**

**10.4.1. Territory Major Investment Fund**

For the baths the Territory Major Investment Fund may have a prominent role, which finances projects improving living conditions in Vojvodina. These primarily include developments for the creation of infrastructure, education, health and cultural facilities. Almost every year tourism and bath development assistance is awarded from the Fund.
In reality, the amount awarded for the territory by the Serbian government as well as the method of calculating the assistance are negotiable: “The budget of the Autonomous Province of Vojvodina equals at least 7% of the total budget of the Republic of Serbia with the provision that 3% of this 7% must finance the large works.”

Due to erratic and in reality small amount of disbursements the projects of the communities cannot be created in time, or in fact even be started. The spa tourism-related developments are in an even worse situation, because they are not among the priority objectives to be supported.

10.4.2. CBC resources (HU-SRB IPA, 2014-2020) and pre-accession funds

The IPA across the Serbian-Hungarian border program of 2014-2020 is still under design. From this program, expectedly nearly every development component will be supported, but with special emphasis on infrastructure development, energy, environmental and tourism services development projects. To support the soft programs (e.g., marketing and development) cooperation programs may be started. The pre-accession funds primarily assist the environmental and energy developments in case of the bath or the related challenges.

10.4.3. Direct international (mainly EU) funds

Primarily direct EU funding may be considered for the baths. There is no intermediate body in Hungary for the direct resources, the applications are international usually submitted in consortium.
However, in some cases, pilot project may also be launched along some general problem (especially in the energy sector, such as the CEF (Connecting Europe Facility -. Using European Interconnect Device).

The new, 2014-2020 budget, in addition to the traditional programs (e. g. LIFE+), introduces three new programs (Horizon 2020, and COSME and which are described the following subsections.

10.4.4. Horizon 2020

The Horizon 2020 framework program is one of the pillars of a priority initiative titled “Innovative Union” of the Europe 2020 strategy, aimed to increase the global competitiveness of the continent.

The Horizon 2020 framework program provides a unified framework for the first time for all EU research and innovation funding instruments.

The Framework Programme contributes EUR 17.9 billion to the budget for ensuring that the EU - maintaining its leading role in industry - remains at the cutting edge of innovation, which it plans to achieve with a EUR 13.7 billion subsidy of the key technologies, providing broader access to capital, and support of small and medium-sized enterprises. The Framework Programme earmarks EUR 31.7 billion for health care, among others, for research of demographic changes. With the Horizon 2020, serious, capital-intensive research and development programs can be implemented, for example, in balneology, medicinal water effect analysis, medicine, etc. In addition, some Horizon 2020 grants support innovative tools development.
10.4.5. COSME – Programme for competitive businesses (2014-2020)

The program for competitive businesses and small and medium-sized enterprises (Programme for the Competitiveness of Enterprises and SMEs - COSME) - has EUR 2.5 billion for the period 2014-2020 - a financing tool that continues the current Competitiveness and Innovation Framework Programme (CIP) activities.

The financial limit for the implementation of the program is EUR 2.5 billion, of which EUR 1.4 billion has been earmarked for funding. The remainder of the amount will be spent on Enterprise Europe Network, to promote international cooperation, and for training skills for entrepreneurship. The fund supports activities of medicinal and wellness complex in the region and of businesses cooperating with it.

10.4.6. Connecting Europe Facility (CEF)

From the fund created for building the transport, energy and telecommunications networks replacing the TEN, not only the rail but also the cross-border public road sections will be developed. The CEF, which is completely new fund, will provide support for creating priority transport, energy and ICT infrastructures of pre-defined pan-European political interests. If the appropriate international partnerships are in place, for the South Plains the implementation of specific energy projects can be a realistic goal (this, of course, may be realized not only by the baths but also in cooperation with the town or, in certain situations, throughout the border region -.. E. g, institutional lighting modernization programs, geothermal programs etc.).
10.4.7. Grant applications submitted directly to Brussels

In the range of direct EU funding belong the funds of the most important operational institutions of the European Union (DGs, agencies, banks, and the programs launched by them), which must be requested or applied for directly from these institutions; that is, access is granted through the Hungarian system. In the case of non-repayable assistance, their intensity generally ranges from 50 to 75 per cent. In case of tourism, DG Enterprise and Industry excels providing soft grants of smaller and smaller amounts each year, which the baths may also apply for.

These grants directly provided by the DGs are, e. g.:
- DG Climate Action (CLIMA)
- DG Education and Culture (EAC)
- DG Energy (ENER)
- DG Enterprise and Industry (ENTR)
- DG Environment (ENV)
- DG Joint Research Centre (JRC)
- DG Regional Policy (REGIO)
- DG Research and Innovation (RTD)
- DG Development and Cooperation – EuropeAid

The Commission makes direct financial contributions in the form of grants (grants) to support projects and organizations that pique the interest of the EU, or contribute to an EU program or policy. Interested parties may call for proposals are given their reply. Since these grants are usually written by one program can be bound to the Directorates programs and their agencies and organizations complicated.


10.5. Repayable assistance

The repayable assistance may be from Hungarian or EU institutions (e. g. development banks – MFB, EIB) or received from a non-EU institution system. The former represent better conditions, but spa and resort development projects can also be implemented with the support of the Hungarian-Serbian banks and mutual funds in the relevant border region. Their common feature is that they must be funded from the project, which, increasingly, only allows the development of profitable investments.

Specific development objectives of the credit facilities may be financed by credit. We can primarily consider well-managed, creditworthy spas which do not pose a risk to the financial stability of the owner, for example the municipalities or communities.

It is possible to fund businesses or specific projects at the initiative of the European Commission or the European investment banks, with subsidized credit interest.

Some forms of financing have been developed according to the individual programs. Being one of the 2020 strategic goals for the EU to increase the intelligent use of energy and reduce energy dependence, for this purpose, for the implementation of energy efficiency and increasing renewable energy, these institutions have created a variety of funds also linked to the Intelligent Energy Europe program or climate protection. These will be covered from the structural funds, so they may be in the form of credit, venture capital and guarantees.

In connection with the debt financing, we point out that until 25 October 2013 of Directive 2011/24/EU the validation of patients’ rights governing the treatment of serious and chronic illnesses and those related to cross-border healthcare have been liberalized
across the European Union. The Directive has been transposed into Hungarian law by Hungarian Government Decree 340/2013. (IX 25) (on the detailed rules for health care treatment abroad). The creation of a legal framework is important because in this, *when certain conditions are met, the treatment of foreign nationals in Hungary may be accounted, with that, in particular, non-residents eligible in, in particular, the scope of treatments applied at qualified medicinal sites.*

The development impact of such regulation may be huge, which must be used in the developments. In connection with this, there are loan programs with which greater market-based developments can be achieved. Such currently existing scheme, for example, is the **MFB Business Financing Program**.

### 11. Recommendations

The Cooling Cubes project sets three primary objectives.

- Increasing the economic and employment role of the tertiary sector in accordance with the specific features of post-industrial development the midst of economic slowdown and falling employment, in the region of the Southern Great Plains and in Vojvodina, which are the project action area.
- Proper utilization of the common geothermal wealth of the two regions and the aspects of sustainability in medicine and in the creation of a wellness culture.
- Enhancing the role of medicinal and natural waters, and the creation of the conditions a new lifestyle including active bath use and shaping them into tourism products.
Accordingly it considers its tasks as

- A more concerted development of the baths of the Southern Great Plain and Vojvodina action area.
- The coordination of the development strategy of the spa and wellness culture.
- Tourism offer of the two regions is the increase in the co-development of the necessary techniques.
- The maintenance of the network of connections between the Cooling Cubes baths and the planning and operating institutions and professionals, and to build application requirement abilities.
- Maintaining good neighborly relations between the Serbian and Hungarian people.

In the formulation of recommendations we considered the following:

- The natural, economic and social conditions of the action area
- The differing conditions of the two regions forming the action area
- The transportation conditions of the action area
- The existing and emerging development plans and documents submitted by the project members
- Questions related to spa ownership and operation
- The governing international trends in the field of development
- The data and information collected during the operation of the project
- The experience of the spas audited in the project
- Our own field surveys
- The supply and demand needs and opportunities
- The various networks built around the spas
- The marketing activities of the spas
- The capital and resource levels, and the investment intentions
Most of our recommendations do not require additional resources; we kept in mind the possibility that we create the unification and grant-worthiness of the Cooling Cubes region. This, however, has three elements that require institutionalization. This may be a new institution, but even more so the expansion of the role of an existing institution, more specifically the extension of its network of partnerships. What are the tasks that require institutionalization?

- Theoretical Methodology Centre - Guarding and further processing the information gathered during the project and the periodic collection and evaluation of the information based on the created methodology; forming methodological recommendations.

- Practical Methodology Center - Training the practitioners associated with the spa culture, the quality assurance of the training process.

- The joint appearance of the spas of the Cooling Cubes action area. Creating and developing the common image and the Cooling Cubes brand, creating and shaping the marketing image for the purpose of maintaining application-worthiness. Creating a functioning CC Board from the owners and operators of the spas operating in the CC action area and representatives of the users of the baths may take place in 1/3 -1/3 -1/3 ratio. The CC Board is a social body, but the operation and grants require a permanent administrator.

- We collected our recommendations and at the end of the relevant actors groups we indicated who is affected by a recommendation (x) and to whom it is really important (X). Please think about your role and involvement along the Cooling Cubes development strategy!

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11.1. Concepts

Tourism, the world of spas are in continuous development; therefore, different concepts are used even by people working in the same profession. Different issues are emphasized. A shining example of this is how the concept of spas e. g. only means the medicinal baths for many in Serbia and seem to find few common element in the world of wellness spas versus other spas. We must clarify and coordinate our concepts, because we can only apply for grants only if others can understand us!

11.2. Information

According to the World Tourism Organization, Hungary belongs in the Central Eastern European region, while Serbia belongs to the Southern European region. Such separation of the Serbian-Hungarian border region makes it difficult to provide information and evaluation. For the conscious and well-founded realization of developments and submission of applications it is essential that appropriate measurement systems continue to function in our spas. In our experience, in many cases, the measuring of neither consumption (e. g. electricity, gas), nor of customer traffic is carried out. The medical-referral system is not transparent; probably due to lack of proper information there is overcrowding and unused capacity at the same time. Accurate and reliable information would mean the basis for the creation of the future development plans.

During the project such quantity and quality of information was gathered that it is justified to make sure that it is guarded, used and continuously expanded with a uniform approach.
11.3. Social security, referral system

We could speak in the case of baths serving explicitly medicinal functions and requiring medical referrals of a greater degree of openness, providing perhaps opportunity, with pool expansions, for the admittance of guests who would be arriving at the facility in order to preserve their health and prevent disease and have no formal medical referral.

11.4. Property

The key issue for development is a transparent ownership structure. Where the owners of the medicinal water, the extractive well, and the land are all different persons, and a fourth person owns the pool, an adventurous investor may still be fund, but it is very difficult. Transparent ownership structure should be established, and its legal conditions must be created.

Then a clear financial transparency must be provided. Especially in the case of baths owned by the Serbian public companies establishing profitability or loss is in many cases only a matter of intent.

This may hinder not just the sale of the baths but also the grant development.

11.5. Development documents

In the development concepts of towns and regions, it is worth emphasizing that the role of existing and yet to be established spas should be examined. It is not recommended for each community to effectuate bath development with the same weight and
importance, but it is worth examining bath supply in the greater regional context. If the development is appropriate, the assessments already including the regional context must be done in the strategic and then the operative development documents. A prerequisite for launching the developments is insuring adequate coverage plan, updating the land use plans, and preparation of the environmental load documents, as well as compliance with the higher level planning documents.

### 11.6. Resources

Bath developments require different measure of concentration of resources, depending on the development schedule. Even the most modest bath developments outweigh the municipalities’ own known development resources in Hungary and Serbian. Therefore, we are talking about infrastructure developments that cannot be implemented without the involvement of external resources in any meaningful way. As a result, the improvements can be financed without private investors or significant non-repayable assistance. Each role player must be aware of the financial and political risks involved.

### 11.7. Sustainability

This concept refers to both the importance of the prior assessment of the environmental impact and the importance of the financial operation. The grant resources are development-centered; the figures indicating sustainability are often based on estimates. There is no sadder sight than a discontinued development or a spa
interrupted due to construction or operation closed at a loss, you can also project the area of Cooling Cubes are examples. For the beach and sub-catchment to increase the price of tickets is limited.

11.8. Nature protection

The thermal waters contain a number of minerals whose return to the living waters is harmful and sometimes forbidden. The extent of the environmental impact must be reduced in the future in each development and operation; therefore, it must be examined with particular care that our spa developments comply with not only the present but also future environmental rules.

The connections should be applied in the broader context to the additional activities as well, in particular, the noise and air load of the environmental. Especially in Vojvodina the ratio of public transport users traveling to the spas is insignificant; in contrast, additional car traffic is significant.

11.9. Developments in space

Our study clearly shows that, considering our action area as one region, we can distinguish four groups of the spas on the basis of their of the health and wellness patronage they attract. Spas with local, sub-regional, regional and macro-regional patronage. Of course, based on the transit traffic that does not mean that more spas of the Cooling Cubes regions would not open up their gates for the clientele of the more distant regions and countries, but now we can only talk of international clientele in a limited manner.
Level 4 does not represent a qualitative difference, only the spectrum of supply might be different. It would be a mistake if every bath would aspire to regional or macro-regional role, as well as unfortunate if every bath would wish to remain a local (community) bath. Co-operation and networking in the Cooling Cubes project area are important, because in this way we can make up for or compliment the partial deficiencies of the services of the local baths.

11.10. Development schedules

It is a theoretical question for many baths. Should we carry out developments in cautious steps or in larger pace?

Positive examples of both models can be found in Hungary.

In case of capital-rich investors, the road to travel is fast, comprehensive technology development; here in general human resources will be the weak point, because well motivated, trained professionals will be missing (e.g. Aquapolis Szeged).

For developments that are fast but not containing all of the elements (e.g., Makó), the lack of hotels impairs the efficiency of the whole bath. The case is similar with Bački Petrovac, where, in addition to a hotel, an Olympic-size pool is also missed by the guests.

The best example of a step by step progress is the Mórahalom St. Elizabeth spa, where the area was added square meter by square meter, and the spa has been going through 15 years of continuous development. This choice was forced by necessity, but in time has been justified. In head and design, plans must be made at least 10 years ahead, but realization must be willing to work in stages and maintain the plans in the light of new needs.
11.11. Our living waters

While in recent years the biggest changes in bathing culture are related to the world of wellness, the spa guests of the action field have mentioned with special attention the beauty and mood of the natural waters. They did this knowing that in their case the seasons are much shorter than for pools and, especially, in case of spas active throughout the year. We must be careful that investment mood would not turn only toward artificially created spas. We should preserve and expand water culture, and bath culture as part of it, by the Tisza and the Danube, as well as our smaller streams. When developing tourism products, we should strive to connect programs relating to the natural waters and health and wellness. This could be one of the specialties of the Cooling Cubes project.

11.12. The guests

Which is our potential target group? It would be desirable to choose, but the spas of the Cubes Cooling region have not yet attained the reliable operation level in professional and financial terms as to forego some of their guests for providing higher standard special service to other groups. For the future, it would be desirable direction. At present, the majority of guests not using the spas for medicinal purposes - especially in Vojvodina – arrive in the group of their family and friends and spend at least half a day in the selected spa. Guests remaining from opening to closing time are typical, and bathers staying for only a couple of hours are rare.

It is desirable to expand the scope of short-term but frequent users, and the creation of program packages and ticket price
combinations that would expand the number of “bath-dependent” persons. A design that extends the. In addition to the tourist clientele, it also increases and promotes the spread of spa usage as part of a lifestyle.

11.13. Networks

Hungarian spa development and tourism developments in both regions over the past 15 years have proved that the coordination of the development intentions is necessary: sharing the experiences gained during the operation, the common processing and answering of technical questions. It is therefore recommended that the ad hoc and permanent forums and forms of co-operation of spa owners, managers and professionals active in the field of health and tourism be created, and the work of the bath clusters developed in the two regions be harmonized and deepened. In addition to that of the owners and operators, the network of bathers and builders of the local spa culture must be created.


The Southern Great Plain and Vojvodina suffer continuous migration loss. Knowledge is decreasing, the young age groups are diminishing. In this situation it is appropriate to maintain the relationship with those who have migrated away and involve their knowledge in our developments also. They live in a place from where our local values appear different; they may be our future guests, maybe even investors. The Re-Turn project of the University of Szeged, or
the Village project of the Development of Small Regions Science Association Voice provides methodological assistance to maintain contacts with emigrants and the expansion of collective knowledge.

11.15. Civil relations

Everyone can use a spa, one would think. The majority of spa guests surveyed believe in the healing properties of the medicinal waters, but many attribute such to non-medicinal waters also. Most of the spa guest experience through their own activity which water is good for what. We must arrive from experience-centered bathing to value-based spa selection. The local spas must be appreciated, but we must know which spa offers what in the Cubes Cooling project area.

In some spas and some spa groups the civilian groups must be created who form the conscious bathers, who nurture the cult and magic of a spa. They provide recommendations to the form of operation and link the spa into the world of the smaller region or the community. They offer cultural and touristic recommendations to the guests staying there for several days. They develop the specific local experience that the guests can identify and purchase.

11.16. Common idea

We can find the common elements in the spa culture of the two regions that can be used to develop a Cooling Cubes brand. This requires that the people living in the project area be more spa-conscious users than those living in other regions. In the longer
term this should be measurable and verifiable with health indicators, whereby citizens of the Cooling Cubes region understand the importance of local waters and can take advantage of them.

11.17. Marketing

Since the spas of the action area in many ways fall short of the standard matured by tourism, we do not have time wait to decades with brand shaping; therefore, such – in part already existing – feeling should be developed that focuses on the overall picture, and it is temporarily forgiven if a service or two is not world class.

In addition to the choice of a professionally sophisticated spa, it must be the impartation of such an optimistic attitude to life where one can you can relax and hang out instead of the noise of and rush the outside world, to heal or have fun and face the problems with a big smile, even stop and refresh yourself for a few hours by the busiest road of the Western Balkans. The Cooling Cubes Project Management will be responsible for working out the image that brings together the two regions. The most efficient and effective marketing is a film series featuring the spas in the action area with a face that everyone knows and accepts. (The heartbeat of Hungarian viewers over 30 is still quickened with a guy named Surda; the questions is what feelings are provoked from viewers from the former Yugoslavia?)

11.18. Training

In the medium and long term, the fundamental question of operating spas is providing human resources and training professionals.
The reputation of a bath where cleanliness is objectionable or the staff is not kind - according to our survey – travels hundreds of miles away, and such spas are not chosen. Therefore, training, from basic level through the spa professions all the way to balneology, has salient professional and market importance. These activities must be organized and carried out in coordination and according to the rules of quality assurance on the action area of the project. These may take place in the form of training courses, or even on one-day forums and discussions. Creating a unified Cooling Cubes brand is impossible without a permanent training institution that provides the professional background. The training is best placed by the professionally most widely accepted spa. The experience (either positive or negative) may promote further development for each bath in the action area.

In addition, for the development and adaptation of the modern values of the spa and wellness culture, the operation of a network of experts with scientific aspirations is necessary. At a high standard, this network could be formed on the bases in Novi Sad and the University of Szeged.
### Table 9: Project proposals by partners

*Source: Schwertner, J.*

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11.19. European Union

The Cooling Cubes Project owes existence to the EU. The potential investor, in addition to the private investors, of large-scale spa development could be the EU e. For this, one must know thoroughly how the EU works, its conceptual and development logic. The EU does not support everything, but there is nothing that cannot be supported by EU funds if appropriately qualified.

Therefore, we must be rather circumspect when preparing our development documents and design and operation our institutional system.

11.20. Time

Tempora mutantur et nos mutamur in illis – says the Latin proverb.

The fashion is present in development policy, in the minds of the investors and in human behavior as well.

Spa developments, both from the aspect of and health and as a leisure time and a healthy lifestyle and, accordingly, in terms of tourism, are also immensely popular. As such, it attracts many investors, but we do not know if this wave will last for years, decades or even a century. After all, times are changing and we are changing with them.
12. Closing remarks

On behalf of the project members we say thanks to all those devoted players who consider the joint development of the South Great-Plain and Vojvodina – namely the Cooling Cubes project – a matter close to their hearts and generously assisted our work. With ideas, information, organization, tender writing, questionnaire work, giving lectures, reports about the projects, pleasant words and encouragement.

Have a nice splash, everyone!
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<th>Settlement</th>
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<td>Tiszakécske Kerekdomb</td>
<td>Kerekdomb Termál Parküdülő</td>
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<td>Ada</td>
<td>Adica Ada</td>
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<td>Apatin</td>
<td>Banja Junakovic Apatin</td>
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<td>Petrőc</td>
<td>Aquapark Petroland</td>
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<td>Bajsa</td>
<td>Bazen u Bajši</td>
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<td>Óbecse</td>
<td>Banje u Bečeju</td>
</tr>
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<td>Bezdan - Bezdán</td>
<td>Bezdán</td>
<td>Bezdan banja</td>
</tr>
<tr>
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<td>Kiszács</td>
<td>nincs adat</td>
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<tr>
<td>Kanjiža - Magyarkanizsa</td>
<td>Magyarkanizsa</td>
<td>Banja Kanjiža</td>
</tr>
<tr>
<td>Novi Sad - Újvidék</td>
<td>Újvidék</td>
<td>Jodna Banja</td>
</tr>
<tr>
<td>Palić - Palics</td>
<td>Palics</td>
<td>Banja Palić</td>
</tr>
<tr>
<td>Sombor - Zombor</td>
<td>Zombor</td>
<td>Gradsko kupalište &quot;Štrand&quot; Sombor</td>
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<td>Zalánkeméni-Horizont (Spa)</td>
<td>Horizont Swimming &amp; Spa</td>
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<tr>
<td>Sztari Szlankamen - Zalánkemén</td>
<td>Zalánkeméni Dr. Borivoje (gyógykórház)</td>
<td>Dr. Borivoje Gnjatić</td>
</tr>
<tr>
<td>Temerin - Temerin</td>
<td>Temerin</td>
<td>Temerinski Banen</td>
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<td>Titel - Titel</td>
<td>Titel</td>
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<tr>
<td>Vrdnik - Rednek</td>
<td>Rednek</td>
<td>Banja Vrdnik</td>
</tr>
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</table>
Annex 2: Analysed spas during the field work in Vojvodina
Source: edited by Z. Martyin

Annex 3:

Annex 4:
Number of visitors in the analysed spas of Hungary and Serbia

*Source: based on the project’s own data collection and estimated data*

<table>
<thead>
<tr>
<th>Location of the institute</th>
<th>Average of the last 3 years</th>
<th>Order of magnitude</th>
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<tbody>
<tr>
<td>Ásotthalom</td>
<td>4 000</td>
<td>0-25 000</td>
</tr>
<tr>
<td>Csongrád</td>
<td>65 000</td>
<td>50 000-100 000</td>
</tr>
<tr>
<td>Kecskemét</td>
<td>250 000</td>
<td>200 000-300 000</td>
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<tr>
<td>Kiskunhalas</td>
<td>150 000</td>
<td>100 000-200 000</td>
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<tr>
<td>Kiskőrös</td>
<td>105 000</td>
<td>50 000-100 000</td>
</tr>
<tr>
<td>Kistelek</td>
<td>15 000</td>
<td>0-25 000</td>
</tr>
<tr>
<td>Kunszentmiklós</td>
<td>15 000</td>
<td>0-25 000</td>
</tr>
<tr>
<td>Makó</td>
<td>275 000</td>
<td>200 000-300 000</td>
</tr>
<tr>
<td>Mórahalom</td>
<td>415 000</td>
<td>400 000 - x</td>
</tr>
<tr>
<td>Szeged Anna Fürdő</td>
<td>100 000</td>
<td>50 000-100 000</td>
</tr>
<tr>
<td>Szeged Napfényfürdő</td>
<td>345 000</td>
<td>300 000-400 000</td>
</tr>
<tr>
<td>Tiszakécske Kerekdomb</td>
<td>25 000</td>
<td>25 000-50 000</td>
</tr>
<tr>
<td>Tiszakécske Tisza-part</td>
<td>145 000</td>
<td>100 000-200 000</td>
</tr>
<tr>
<td>Kiskunfélegyháza</td>
<td>75 000</td>
<td>50 000-75 000</td>
</tr>
<tr>
<td>Kiskunmajsa</td>
<td>350 000</td>
<td>300 000-350 000</td>
</tr>
<tr>
<td>Lakitelek</td>
<td>56 000</td>
<td>50 000-100 000</td>
</tr>
<tr>
<td><strong>Hungary total</strong></td>
<td><strong>2 371 000</strong></td>
<td><strong>2 300 000-2 400 000</strong></td>
</tr>
<tr>
<td>Ada</td>
<td>50 000</td>
<td>25 000-50 000</td>
</tr>
<tr>
<td>Magyarkanizsa</td>
<td>50 000</td>
<td>50 000-100 000</td>
</tr>
<tr>
<td>Bajsa</td>
<td>10 000</td>
<td>0-25000</td>
</tr>
<tr>
<td>Palics</td>
<td>75 000</td>
<td>50000-100000</td>
</tr>
<tr>
<td>Apatin</td>
<td>150 000</td>
<td>100000-200000</td>
</tr>
<tr>
<td>Óbecse</td>
<td>50 000</td>
<td>25000-50000</td>
</tr>
<tr>
<td>Temerin</td>
<td>50 000</td>
<td>25000-50000</td>
</tr>
<tr>
<td>Újvidék</td>
<td>55 000</td>
<td>50000-100000</td>
</tr>
<tr>
<td>Zalánkemén (gyógykórház + Spa)</td>
<td>120 000</td>
<td>100000-200000</td>
</tr>
<tr>
<td>Petrőc</td>
<td>36 000</td>
<td>25000-50000</td>
</tr>
<tr>
<td>Bezdán</td>
<td>45 000</td>
<td>25000-50000</td>
</tr>
<tr>
<td>Zombor</td>
<td>70 000</td>
<td>50000-75000</td>
</tr>
<tr>
<td><strong>Serbia total</strong></td>
<td><strong>761 000</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3 132 000</strong></td>
<td></td>
</tr>
</tbody>
</table>
Annex 5:
Computative average number of employees in the analysed spas (2011-2012)

*Source: project’s own data collection and cegeinfo.hu*

![Avarage number of employees in spas (capita)](image)

Annex 6:
Position of institutions with loose configuration within the settlement

<table>
<thead>
<tr>
<th>In the center of the settlement</th>
<th>On the confines of the settlement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kunszentmiklós</td>
<td>Ada</td>
</tr>
<tr>
<td>Szeged Napfényfürdő</td>
<td>Ápatin</td>
</tr>
<tr>
<td>Makó</td>
<td>Bajsa</td>
</tr>
<tr>
<td>Óbecse</td>
<td>Zalánkeméni Horizont (Spa)</td>
</tr>
<tr>
<td>Temerin</td>
<td>Kecel</td>
</tr>
<tr>
<td></td>
<td>Kecskemét</td>
</tr>
<tr>
<td></td>
<td>Kiskőrös</td>
</tr>
<tr>
<td></td>
<td>Kiskunhalas</td>
</tr>
<tr>
<td></td>
<td>Kiskunmajsa</td>
</tr>
<tr>
<td></td>
<td>Lakitelek</td>
</tr>
<tr>
<td></td>
<td>Magyarkanizsa</td>
</tr>
<tr>
<td></td>
<td>Petrőc</td>
</tr>
<tr>
<td></td>
<td>Rednek</td>
</tr>
<tr>
<td></td>
<td>Ásotthalom</td>
</tr>
<tr>
<td></td>
<td>Tiszakécske - Kerekdomb</td>
</tr>
<tr>
<td></td>
<td>Tiszakécske - Tisza-parti</td>
</tr>
<tr>
<td></td>
<td>Zombor</td>
</tr>
</tbody>
</table>
Annex 7:
Daily entry ticket prices of the analysed spas (sequentially)

*Forrás: saját adatgyűjtés*

<table>
<thead>
<tr>
<th>Fürdő</th>
<th>din</th>
<th>Ft</th>
</tr>
</thead>
<tbody>
<tr>
<td>Szeged, Napfényfürdő</td>
<td>1610</td>
<td>4300</td>
</tr>
<tr>
<td>Kecskemét</td>
<td>1348</td>
<td>3600</td>
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<tr>
<td>Petőc</td>
<td>1000</td>
<td>2670</td>
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<tr>
<td>Makó</td>
<td>824</td>
<td>2200</td>
</tr>
<tr>
<td>Kiskunmajsa</td>
<td>712</td>
<td>1900</td>
</tr>
<tr>
<td>Mórahalom</td>
<td>712</td>
<td>1900</td>
</tr>
<tr>
<td>Szeged, Anna fürdő</td>
<td>618</td>
<td>1650</td>
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<tr>
<td>Tiszakécske-Tisza-part</td>
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<td>1400</td>
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<tr>
<td>Tiszakécske-Kerekdomb</td>
<td>375</td>
<td>1000</td>
</tr>
<tr>
<td>Kiskőrös</td>
<td>375</td>
<td>1000</td>
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<tr>
<td>Lakitelek</td>
<td>375</td>
<td>1000</td>
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<td>Kiskunfélegyháza</td>
<td>337</td>
<td>900</td>
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<tr>
<td>Kiskunhalas</td>
<td>337</td>
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<td>Kistelek</td>
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<td>900</td>
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<tr>
<td>Csongrád</td>
<td>307</td>
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<td>Kunszentmiklós</td>
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<tr>
<td>Ada</td>
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<td>614</td>
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<td>481</td>
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<tr>
<td>Bajsa</td>
<td>70</td>
<td>187</td>
</tr>
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</table>

*Source: Project’s own data collection*

*Remark: In the case of more kind of entry ticket prices the higher was considered*
Annex 8:
Spatial relations of West-Balkans
Annex 9:
Annual electricity consumption of some institutions, 2012
Source: Based on project’s own data collection

Annex 10:
Annual natural gas consumption of some institutions, 2012
Source: Based on project’s own data collection
## Annex 11:
### Extant online marketing tools in the institutions

*Source: Based on project’s own data collection*

<table>
<thead>
<tr>
<th>Institution</th>
<th>Have a website</th>
<th>Active Facebook presence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ásotthalom</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Csongrád</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Kecel</td>
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<td>0</td>
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<tr>
<td>Kecskemét</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Kiskőrös</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Kiskunfélegyháza</td>
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<td>0</td>
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<tr>
<td>Kiskunhalas</td>
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<td>1</td>
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<tr>
<td>Kiskunmajsa</td>
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<td>1</td>
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<tr>
<td>Kistelek</td>
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<td>0</td>
</tr>
<tr>
<td>Kunfehértó</td>
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<td>0</td>
</tr>
<tr>
<td>Kunszentmiklós</td>
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<tr>
<td>Lakitelek</td>
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<td>1</td>
</tr>
<tr>
<td>Makó</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Mórahalom</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Szeged Annafürdő</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Szeged Napfényfürdő</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Tiszakécske Tisza-part</td>
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<td>0</td>
</tr>
<tr>
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<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Ada</td>
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<td>1</td>
</tr>
<tr>
<td>Apatin</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Petrőc</td>
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</tr>
<tr>
<td>Bajsa</td>
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<tr>
<td>Kiszács</td>
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