



**Mapping and Performance Check of the Supply of
Accessible Tourism Services
(220/PP/ENT/PPA/12/6491)**

Case Study 8

Slovenia NTA, ŠENT NGO and Premiki, Slovenia

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**European Commission
Enterprise and Industry Directorate General (DG
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“Mapping and Performance Check of the Supply of Accessible Tourism Services” (220/PP/ENT/PPA/12/6491)

Slovenia

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Executive Summary

Slovenia offers an interesting perspective on the interplay between businesses, social enterprises and institutions in accessible tourism. The study presents both a mapping of the local market for accessible tourism and a review of existing good practices.

From interviews with stakeholder and available data, it emerges that Slovenian *accessible* tourism is far from being a source of comparative advantage, despite the sizable role of tourism in relation to overall economic output and employment. To be sure, the advancements brought about by public and private actors contributed to greater business awareness and a number of success cases. Over the last decade, the progress made resulted in the receipt of local and European level awards to enterprises and local municipalities, with the main accessible tourism destinations being clustered around the main cities. Some of these awards were said to provide “external recognition” among European level experts, without a commensurate impact on the domestic market.

The contribution made by non-for-profit organisations, such as Premiki and the NTA (National Tourist Association), has enhanced the quality of private sector accessible offer and therefore deserves closer scrutiny. These organisations provide numerous services, including support in the implementation of EU projects, training services and information provision, and developed over time in both the range of disabilities and the tourism sectors covered. However, private sector providers generally struggle to broaden their customer base, especially from abroad, due to lack of adequate promotion strategies and competences of staff. Lack of resources in a fragmented market complicates further the possibility to make substantial investments.

The integration of the supply chain and the importance attached to cross-impairments are judged to be below standard, despite a number of positive cases. For example, existing communications strategies are implemented without a sufficient attention to all disability types. A number of destinations have developed adequate train services and stand out on a national level, while other means of transportation are penalised and only catered for by non-for-profit organisations. More generally, businesses tend to prioritise certain disabilities (e.g. mobility related ones) and lack a concrete interest in developing their offer across the board. However, recent efforts in rewarding accessible offer, such as the disability friendly certificate, have included this concept in their eligibility criteria.

Overall, the case study provides a mixed picture of the state of Slovenian accessible tourism. Successful cases are hardly replicable on a higher scale or in different contexts. This is due to the uneven distribution of accessible businesses across the territory, which suffer from a poorly integrated supply chain. Moreover, the very emergence of the public-private organisations was originally due to the lack of initiative on the part of (public and) private actors. While successful, they signal the lack of genuinely private initiative, whose potential is hindered by the lack resources for larger investments.

1.0 Introduction

Slovenia stands at the crossroads between Italy, Austria, Hungary and Croatia. Despite its modest size (20,273 km²), it offers a wide variety of destinations, with landscapes as different as the Slovenian Alps, the Karst Plateau and the Adriatic Sea.

Selected indicators suggest that the general tourism business environment is improving over a number of dimensions. Compared to 2011, data from the World Economic Forum¹ record an improvement in the perceived prioritization of travel and tourism within the country, with the country ranking 50th in 2013 versus an 80th place in 2011². In addition, the country moved forward to the 52th from the 61th place in the ranking assessing human cultural and natural resources. The share of the travel and tourism industry, currently 3.5% of the total domestic GDP (12.8% after accounting for all related activities), is expected to increase by nearly 3 percentage points between 2013 and 2022, with sector-specific employment increasing by about 0.5 percentage points over the same period.

A 2009 report published in the context of the MiT! (Make it Accessible!) project funded by the European Commission (DG Education and Culture) stated that “it is clear that Slovenia cannot be proclaimed as one of the better developed destinations for accessible tourism”³. As it will be shown, this claim is still valid for a number of structural reasons. Indeed, the progress of the sector as a whole is hindered by lack of information for tourism, an excessively fragmented offer and insufficient efforts by private enterprises alone. Nevertheless, a number of positive cases stand out for their relevance and effectiveness, may potentially contribute to the estimated figures above and set the ground for further future advancements. In particular, the role of government policy, with a focus on the recent pledges to make offer more attractive, the leading role of a few selected outstanding private initiatives (e.g. thermal sector) as well as social enterprises present considerable strengths.

The full picture will be presented in greater depth in the remainder of the case study. In the next section, the market for accessible tourism is framed within the long term plan set out by the Ministry of Economic Development. Moreover, an overview of the historic role played by the market is supported by quantitative data, relevant literature and the contributions from interviewees. The third section will map the supply chain to examine full integration of services provided by different actors. The fourth section will examine the role of cross-impairments, and the room for improvements that are now well catered for. In the fifth section, a business case for accessibility is examined. While there is limited evidence that enterprises participate

¹ World Economic Forum (2013) The Travel & Tourism Competitiveness Report 2013: Reducing Barriers to Economic Growth and Jobs.

² While the 2013 ranking includes 140 countries, the 2011 ranking includes 139 countries.

³ <http://www.mit-makeitaccessible.eu/MIT%20WP3%20Report%20on%20Research%20&%20Exploitation.pdf>

proactively without the support of external actors (e.g. institutions and social enterprises), it is noted that the future success of accessible tourism calls for additional efforts by stakeholders.

In short, despite individual initiatives, Slovenian accessible tourism sector does not reach its potential (a full assessment is provided in section 7.0). The Slovenian experience indirectly shows the importance of a number of factors, such as information, human capital, and calls policies to address the suboptimal level of business involvement.

2.0 Overview and background information

In order to provide an overview of accessible tourism in Slovenia, it is important to put the sector in context with respect to both the present tourism offer and the public policy objectives that national authorities aim to reach. In 2012, the Ministry of economic development and Technology developed the “2012–2016 Slovenian Tourism Development Strategy”. The following three goals have been set out with a view to expanding the tourism sector:

- Encouraging enhanced competitiveness;
- Ensuring a favourable business environment;
- Efficient marketing and promotion of Slovenia⁴.

In relation to the first goal, the document states that forming a strategic framework or scheme to develop socially responsible tourism is an activity with financial effect, and that improvements in the quality of the touristic offer can be achieved by encouraging the accommodation facilities and/or providers to “specialise”. This may indeed involve targeting special market groups, including elderly people and people with disabilities⁵. It is therefore evident to policy makers that accessibility can impact the economic potential of Slovenia, which is highly dependent on tourism. The Ministry places high ambitions on this sector. By 2016, the main targets are:

- Increase the number of overnight stays by 2%;
- Increase the number of tourists by 4%;
- Increase the inflow from the export of travel by 6%-8%⁶.

These growth ambitions are challenged by the lack of competitiveness of a number of policy areas. Based on internationally comparable statistics, the 2012 report shows that seven main areas were identified⁷. Throughout this list, the inconsistency and fragmentation of the tourism offer is perceived to be a major weakness. As we will see, this is particularly relevant to the accessible tourism area.

The heterogeneity of Slovenian tourism services despite the modest country area is evident from its geographical features. For example, while the Mediterranean coast by the Adriatic Sea attracts visitors for its natural reserves (Strunjaan, Sečovelje) and medieval urban architecture (Piran, Izola, and Koper) draw visitors with their medieval cores, the Alpine region, at the

⁴ http://www.mgrt.gov.si/fileadmin/mgrt.gov.si/pageuploads/turizem/Turizem-strategije_politike/STRATEGIJA_ENG_WEB.pdf

⁵ See above (page 68).

⁶ Annual growth rates.

⁷ Areas identified: funds for the development and marketing of Slovenian tourism, (geographic) accessibility of Slovenia, promotion tourism offer, human resources, business environment, legislation.

intersection of three large mountain ranges and sub-alpine plateaus, offers a significantly different range of activities, including skiing, climbing, hiking, panoramic and thematic trails. Although the market has not reached maturity, the opportunities for businesses are substantial. Not only Slovenia is easy to reach from neighbouring countries (Austria, Hungary, Germany and Italy), but has a sizable internal demand pool that adds to the presence of foreign tourists. It is estimated that

- 8 % of population has at least one disability;
- About 50% of their members travel every year.

(Švigelj and Cvetek, 2010: 4).

The table below maps the institutional environment and provides a review of the market conditions that characterise the area. Historically, Slovenian disabled consumers have a vulnerable economic status and limit their choice towards treatment activities in hotel and spa resorts and sightseeing trips in the major cities. Three main ministries are identified as having a stake in policies related to accessible tourism. The ministry of labour, social affairs and families focuses on disability, social inclusion, training and employment policy. The disability directorate is responsible from care, training, administrative issues and employment rights of people with disabilities. The ministry of culture also has a stake in promoting accessible tourism through programmes and events based on accessibility. Lastly, the ministry of economic development and technology generates government policies in relevant sectors, including tourism, with a view to improving competitiveness and generating employment and growth opportunities.

Figure 1: An overview of the main features of the environment for disability.

Tourism Sector in Slovenia- Disability Segment (2010)	
Institution responsible for support	Ministry of labour, social affairs and families (disability directorate) Ministry of Culture Ministry of economic development and technology
Main holiday destinations	Main cities: Pacug ⁸ , Novi grad, Spa Catež, Bela Krajina, Ljubljana.

⁸ In Pacug, the Paraplegic Association owns accommodation especially designed for disabled people.

	Main accommodations: health and spa resorts, adapted 4 (or higher) star hotels.
Demand drivers	Quite weak economic status, high sensitivity to price. Main activities: socialising, sightseeing, activities in pools. Main accommodation type: hotels and spas with special equipment

Adapted and updated from Švigelj and Cvetek (2010, 6-15)

Against the background of domestic economic conditions and policy environment, European policies and institutions have had a substantial stake in the development of accessible services (see table below). These have included training as well as other projects.

Figure 2: A selection of past European development projects in Slovenia.

Project	Aim
EVOCATE (Leonardo da Vinci programme)	Incorporation of accessible tourism into the educational system.
Disability friendly plateau	Development of accessible tourism offer in Banjška and Trnovska planota.
TURAG4ALL	Training for working in travel agency.

Source: Premiki (2013)

Premiki⁹, a social enterprise, played a role in all of the projects above. The Evocate project, for example, aimed at improving accessibility through training. In this context, the provision of vocational education was discussed and strengthened to improve the skills of professionals in the tourism sector (e.g. catering, hotel management, accommodations). This had a direct impact

⁹ Premiki, http://premiki.com/?page_id=5751&lang=en.

on the way training is provided in Slovenia: Premiki renewed and shaped its training curriculum (see next section) based on the guidelines and common standards used in Europe. Moreover, Premiki examined the potential for introducing accessible tourism in school curricula, albeit without success. In the "Travel agency for persons with special needs" (TURAG4ALL) project, both Premiki and the National Tourist Association (NTA) collaborated to inform vulnerable groups about opportunities for training and employment in tourism. This had a tangible impact since 10 disabled people were trained to work in tourism and some employed. Although this does not relate directly to the improvement of the tourism offer, it brought together stakeholders in the field and created greater awareness of tourism accessibility.

The third project selected does not concern training but aims at exploring the market potential of the Banjška and Trnovska plateau, thereby extending accessible tourism to less urbanised areas. Although it was not possible to obtain evidence of its impact other than the positive feedback of its organisers, it signals the perceived discrepancy between urban areas and the rest of the country, which remains a problem and is yet to be addressed on a general level.

3.0 The integration of the supply chain

In order for a tourism destination to be accessible, supply needs to be adapted at all levels. This requires the involvement of businesses and public authorities alike. This is important due to the increasing relevance that accessible tourism is gaining in Slovenia, as an interviewee claims. Anecdotal evidence provided suggests that organisations providing assistance to private enterprises have developed and are now better known in the field than 10 years ago.

As we have seen in the previous section, demand has specific characteristics that drive investment decisions in accessibility enhancing business projects. A gap in the supply chain might put at risk their effectiveness, for example if the destination is not geographically accessible or if the newly established service is not visible to potential customers. This calls for a mapping and assessment of specific stages of the supply chain, including communication, travel agency services, transportation, public buildings and restaurants. Sections on training, where Premiki's initiatives have brought about substantial advancements, and on health resorts, an outstanding tourism sector, deserve a special mention and are therefore included.

Communication

Marketing activities pursued by the government sector, non-governmental organisations and businesses use the brand "I feel Slovenia" (Slovenijo čutim). This is present in most domestic destinations and is used for promotional activities abroad, among visitors and in the areas of culture and science. This is used in tourism, with the website slovenia.info being the main point of contact for tourists. Although this website contains information about accessible destinations, it is not optimised for disabled people and does not provide ad-hoc platforms. Indeed, a stakeholder suggests that communication activities suffer from the absence of a centralised institution making information available on a wider level. A larger platform would take advantage of greater technical competences and resources, which would in turn improve the accessibility of the content available.

Travel agency

Among other things, Premiki operates as a travel agency in its own right. These services are aimed at tourist groups of at least 35 people. Not only do they focus on domestic, but also other (mostly European) destinations. The "themes" of the holiday packages in Slovenia include gastronomic trips, sport and wellness, winery tours, participation in local events (festivals and carnivals) and the visits to destination of natural and cultural interest. By so doing, Premiki adds value with tailor made programs for tourist groups. For an extra fee, Premiki can provide some additional services, such as:

- Sign language interpreters;
- Booking services (flights and hotels);

- Hire of adapted cars, buses and vans;
- Organisation of guided tours with trained tourist guides in several languages;
- Field trips on the topic of social entrepreneurship and social care;

This service has been successful and has developed over time, despite the non-sizable absolute numbers. The number of guests has indeed increased since 2011, doubling the customer base in 2012 and recording a further 11% increase in 2013 relative to the previous year. Of these, an increasing number of services has involved booking air tickets and travelling to domestic destination, and has served large groups of both regular and disabled people.

Transportation

Transportation services can impact the appeal that a destination has on disabled tourists. In this case there seems to be a gap between larger city centres and other minor destinations. From feedback received by stakeholders, the following cities appear to fare better than average (in alphabetical order): Ajdovščina, Ljubljana, Maribor, Murska Sobota, Nova Gorica, Ptuj, and Slovenjske Konjiceand.

Indeed, Ljubljana is characterised by the best functioning public transportation infrastructure. For example, buses have low steps to the benefit of people with constrained mobility, and the main railway station is equipped with elevators, with support from trained staff for access to platforms.

Within Slovenia, trains are possess a number of accessibility features:

- On some Inter City trains, a portion of all available seats is reserved for people with disabilities.
- Trains that have carriages with special features for wheelchair users are advertised on publicly available schedules.
- Motorised lifting seats are available for wheelchair users on selected routes.¹⁰
- Audio announcements for blind or partially sighted people (mostly in Ljubljana).

Moreover, there exist discounted fares in a number of destinations and for a greater variety of needs:

- Blind people and people with muscular dystrophy and similar disabilities may receive (up to 75%) discounts on up to 12 trips per

¹⁰ <http://www.slo-zeleznice.si/en/passengers/useful-information/passenger-info/people-with-limited-mobility>

year, with no charge for accompanying passengers (including guide dogs for the blind).¹¹

For other destinations, such as Ljubljana's castle, there exist targeted facilities, particularly for wheelchair users. In fact, the courtyard of the castle, which is one of the most visited area, is accessible through the Lapidarium for people with mobility impairments. A number of NGOs provide vans for disabled people for city tours in Ljubljana, as well as conferences and public events. However, this does not always satisfy demand due to tangible capacity problem. These vans are often too small and can only include 3 or 4 tourists.

However, it is noted that many of the provisions focus on limited mobility. Moreover, certain destinations lag behind in adapting their transport services. Bled, Bohinj, Piran have been mentioned by stakeholders as examples where there is evident room for improvement. This has hindered their development as accessible destinations, where all disabilities, including mobility related ones, are not addressed to satisfactory degrees.

Training

Although training is not directly enjoyed customers, it improves the quality of the services received. Premiki's main strength and tradition lies in this area. Their curricula have been adapted to the business needs of waiters as well as specific staff in accommodation structures. The typical training programme's curriculum consists of:

1. An explanation of the definition of accessible tourism.
2. A review of the needs that need to be met in order to make tourism accessible.
3. A class on welcoming techniques.
4. A presentation of different ways of providing correct information
5. A review of good practices.
6. Practical training

This course is available for restaurateurs, hotel staff and travel guides. In the past, professional training was taken up by a number of enterprises that subsequently proved successful in addressing disability problems. According to a report published in 2009 by the MIT! project funded by the European Commission¹², all major health & spa resorts took part in training sessions of this type. Although it is hard to assess causally whether training had a business impact on health resorts by making offer more appealing, it is no coincidence that this service was taken up by the most successful market niche within accessible tourism.

Public Buildings

¹¹ Ibid.

¹² <http://www.mit-makeitaccessible.eu/MIT%20WP3%20Report%20on%20Research%20%20Exploitation.pdf>

Slovenian laws regulate the presence of accessible services. Thanks to this, parking spaces for disabled are generally available. However, other services in public building are less often adapted to satisfactory levels (e.g. toilets), and architectural barriers for those with mobility impairments have not been addressed in various instances despite greater awareness.

Restaurants

From feedback available online and from one interview, restaurants are not seen as being fully integrated. Despite moderate business interest, the financial crisis slowed down the integration process due to lack of funds to be invested coming from the public and private sectors. The main reason for this was attributed to the lack of planning, let alone a “culture”, for serving disabled people. As a result, the focus remains on wheelchair users and blind people, who occasionally benefit from menus in Braille. In conclusion, the move forward towards a better adapted service has been partial with regards to both the level and scope of investments.

Health Resorts

It is worth examining this industry sector for two reasons. First, Slovenia has developed a market niche in providing such services that attracts tourists from abroad. According to the 2009 report by the MIT! project¹³, traditional health resorts have in the past adapted their marketing strategies to those of more modern wellness & spa resorts.

Second, the typical consumer has a higher than average age with correlates with the presence of physical difficulties that need to be addressed. For example, access to the pools is made easy (Terme Zreče, Rogaška Slatina) thanks to ad hoc machinery. A number of spa centres offer targeted medical programs for elderly people (e.g. Thermana, Laško- see section 5.0). Moreover, large rooms are specially designed for mobility impairments and a number of useful tools are provided for people with hearing problems. On a more general level, special care is devoted to overcoming architectural barriers.

Despite the success of health resorts in providing adapted services, an expert in the accessible tourism sector expressed concerns about the role that health resorts seem to play in the tourism industry. It was argued that, occasionally, offer is still perceived too much as medical care rather than tourism. This has repercussions on their ability to attract new customers, who need to be targeted in order to obtain information on the services provided. It was indeed suggested that a significant share of customers who benefit from accessible services are habitual, and that therefore the influx of new customers remains a challenge. This may be complicated by lack of exposure outside of Slovenia.

¹³ Ibid.

4.0 Provisions for cross-impairments

The main weakness of Slovenian accessible tourism offer lies in the absence of structured planning. This has important repercussions on cross-impairments. In fact, even when tourism suppliers implement good practices, business do not always tend to have a holistic perspective.

Anecdotal evidence suggests that suppliers tend to prioritise disabilities and cater for them in order. Mobility accessibility is perceived to be the most urgent requirement. Even in this case, however, efforts are not always comprehensive. For example, while manually propelled wheelchairs are considered as an essential first step to broaden the offer to disabled tourists, electronic wheelchairs are penalised and face greater obstacles. Partially sighted and deaf tourists are typically addressed at a later stage, and are said to require greater business commitment. Due to the pioneering role that ŠENT, the Slovenian Association for Mental Health, has had in promoting accessibility, interviews delivered a positive outlook in the attitude that businesses have towards mental disabilities.. In this case, the investment is not so much in physical capital, but requires training and knowledge of how to take care of tourists' needs. On the contrary, other impairments, such as asthma, diabetes, epilepsy and food allergies have a marginal role and are rarely addressed.

The prioritisation of disabilities can be due to two main factors. Providing certain services is not in the interest of suppliers, either because initial adaptation costs are too high or because the potential consumers benefitting from them are too low, thereby lowering the returns to investments. To be sure, the disabled friendly certificate encompasses all disability needs. In order to obtain recognition, which increases exposure and expected returns, demonstrable effort needs to be put into adapting all needs. Moreover, the labels used by Premiki (see below) advertise destinations based on specific disabilities. This could in principle motivate businesses to broaden the range of disabilities covered. However, the label system needs to be scaled up and advertised at a truly national level, in line with other successful European countries.

Figure 3: Disability friendly labels

Legenda ikon:



za goste, ki ne morejo ali težko hodijo in uporabljajo invalidski voziček



za goste, ki težje hodijo



za goste, ki so slabovidni ali slepi



za goste, ki so naglušni ali gluhi



za starejše osebe, ki potrebujejo prilagojeno ponudbo



za družine z otroki



za osebe s težavami v duševnem zdravju in motnjo v duševnem razvoju



pogojno dostopno, natančne informacije dobite v agenciji Premiki

Source: Premiki, 2014, "Izleti, potovanja, Počitnice, strokovne, ekskurzije".

5.0 Business approach – building a business case for accessibility

To be sure, a perceived weakness of accessible tourism in Slovenia lies in the limited awareness of its business potential. In various ways, the contacts interviewed share the opinion that accessibility is perceived by the majority of business providers as a social policy issue to be enforced through legislation or with the initiative of institutions. Before looking at business role of Premiki as one of the most successful entities in the field of business, a selection of accessible tourism destinations is outlined below.

Figure 4: A selection of accessible tourism destinations

Destination	Accessible features
Postojna caves	Accessible transportation and routes
Thermana Lasko	Various measures for wheelchair users, blind and deaf people
Triglav National Park	Access ramps

First, natural caves have been claimed to be increasingly popular among disabled tourists. Postojna cave is in fact the most visited cave in Europe and has put in place several measures to make their offer more accessible. This was made possible by the presence of accessible transportation and staff instructed to help disabled people get off and on the train, with easy access in the other parts of the cave. Although it is not possible to quantify the impact that this has had on revenues and sales, all stakeholders interviewed recognise this as an example of an effective investment with a significant positive impact on the business.

Thermana Laško went through a number of big investments over the last years.¹⁴ This also included a number of accessibility enhancing measures, resulting in better access for people with mobility impairments, standards for the visually impaired (with better access to guide dogs) and mobile induction loops for hearing impaired.

¹⁴ Slovenia Times (2014). Business the wellness way- Thermana Laško. Accessible at: <http://www.sloveniatimes.com/business-the-wellness-way-thermana-lasko>.

Another important example is Triglav National Park. A system of ramps has been developed and has gained the attention of national experts in accessible tourism. Moreover, accommodations within the Park are easily accessible (for example, the Trenta Lodge), which render the destination more disabled friendly.

Another important Slovenian success case, already touched on in the previous sections, lies in the social entrepreneurship sector. In one instance, the organisation expanded from focussing on mental health exclusively to initiating comprehensive projects with important European stakeholders. The enterprise now revolves around three main pillars:

- Implementation of EU projects;
- Training provision to businesses;
- Information provision.

As we have seen, Premiki acts as a tour operator by providing relevant information to disabled tourists. By offering brochures and tailor-made information on destinations and their accessibility levels, it filled a gap in the market as exemplified by the award received by the World Tourism Organisation UNWTO for innovations in non-governmental organisations in 2011. However, it was noted that this prize gave Premiki recognition abroad and at the international level more than in Slovenia. This may have mitigated the impact of their domestic activities.

In order to appreciate the business dimension of Premiki, it is worth stressing that training courses are subject to fees, which indicates the customers' motivation to improve their offer, as well as the existing room for making accessibility enhancing services profitable.

As a national destination, Slovenia has taken part in the European EDEN (European Destinations of Excellence) project since 2008. Within this project, destinations compete for an award: the EDEN recognition of excellence. This stands in a two way relationship with business:

- The city is given recognition as a quality destination that stands out for its offer of sustainable tourism. Accessibility related needs, including mobility, sensory, intellectual and psychological impairment have been the focus of the 2013 edition of the award;
- Upon selection, the city can enjoy numerous advantages both in promotional and development terms, which can foster the competitiveness.

Figure 5: Slovenian winners of the EDEN projects

Year	Destination
2008	Soča Valley
2009	Solčavsko region
2010	Kolpa river
2010	Idrija
2013	Laško

Source: Slovenia.info.

The winners of the title "European Destination of Excellence" can take advantage of business opportunities by enhancing their visibility in the market: promotional brochures, publications and posters, advertising campaigns, study trips for journalists all enhance the destination's exposure to potential customers and, on a higher level, with other EDEN winning destinations. All winning destinations are indeed invited to workshops with the goal of fostering policy learning in the field of sustainable tourism.

With respect to accessible tourism, the 2013 winner, Laško, deserves special mention. In 2008, its municipality prepared a Strategic Development Plan for the Disabled, while in 2009, Thermana Laško d.d. – Zdravilišče Laško Hotel obtained the golden certificate 'Disabled-friendly company'.

Box 1: EDEN award winner: Municipality of Laško

The 2013 winner of the "EDEN" award: Municipality of Laško.

The municipality of Laško has considerable know how and infrastructures for disabled people. Traditionally, the municipality has developed an expertise in hosting sport events with an inclusive approach to disabilities. In particular, physical and architectural barriers have been overcome with the support of local authorities. The success of this specialisation has spilled over into other recreational activities in proximity to cultural and natural destinations, such as excursions, wellness and health services, and has motivated the development of adequate infrastructures ranging from public transportation to support services.

In 2011, the Slovenian Association of Disabled Workers created an award entitled "disabled-friendly municipality" charter aimed at encouraging municipalities to cater for a more inclusive and accessible quality of life, which includes touristic initiatives.

Figure 6: Recipients of the "Disabled- Friendly Municipality" charter

Year	Municipality
------	--------------

2012	Municipality of Ptuj
	Municipality of Murska Sobota
	Municipality of Nova Gorica
2011	Municipality of Slovenske Konjice

Notwithstanding these important exceptions, feedback from one stakeholder suggests that the factor preventing higher entrepreneurial activity in accessibility does not lie in a lack of supply-side awareness, but in a number of more structural factors, including:

- Lack of sufficient training and qualified personnel in the industry
- Lack of information aimed at targeting potential customers.
- Lack of tourism infrastructure

These weaknesses disfavour public and private businesses. Among private businesses, particular emphasis is placed among enterprises that do not operate with public money. This category is considered has having an unexploited potential that could be fulfilled in the presence of more developed infrastructures. As we have seen, an exception is represented by health and spa resorts.

6.0 Conclusions

In conclusion, Slovenia can be considered as a small territory where tourism, despite being an important source of business opportunities, does not excel in providing adequate services for disabled people. A number of positive cases stand out among businesses, non-for-profit enterprises, municipalities and governmental agencies. Yet, a shortage of satisfactory resources and the lack of a common strategy hinder the efforts put by proactive private and public parties.

The supply chain presents both strength and weaknesses. At the preliminary stages of people's trips there are below average levels of information. Recent efforts have been made in providing more detailed information on specific needs with the support of non-for-profit organisations and tourism boards. In particular, these platforms need to be adapted for people with disabilities. Geographic accessibility presents mixed features. While public transport in the main cities and on selected means (e.g. trains) is adequate, the capacity of other services (e.g. buses to popular destination) needs to be scaled up in order to meet demand.

From a business perspective, it has been observed that businesses are generally reluctant to invest personal resources in accessibility enhancing investments. This has negative consequences both on the quality of staff and availability of adapted machinery and tools. However, there seems to be increasing awareness about the business potential of accessible tourism, since organisation providing training and ad-hoc certifications have been successful in delivering these services to enterprises (in particular hotels and wellness centres).

To conclude, the existence of individual initiatives does not compensate for the lack of an integrated strategy on accessible tourism. For this reason, the assessment in Annex 1 provides mixed outcomes on relevance, effectiveness, sustainability and innovation. The transferability of those successful initiatives (in particular, the wellness sector and social entrepreneurship) does not appear to be feasible due to their limited scale.

7.0 Recommendations

The following recommendations draw on both the strengths and weaknesses of Slovenian accessible tourism offer. While some stem from the observation of good practices, others are derived indirectly by identifying the flaws of the supply chain. Such recommendations are particularly relevant to destinations that present a high degree of similarity with Slovenia:

- Social entrepreneurship must be promoted to foster and complement the activities pursued by private business. Not only can they compensate for the lack of adequate services at specific stages of the supply chain (e.g. communication, tour operator) and improve the offer of private suppliers (e.g. training), but they can operate themselves on a market basis by selling their products and services.

- Policy learning must be strengthened to facilitate the emergence of good practices. The concepts behind a number of existing initiatives (destination awards, the disability labels) have a common European root that has been acknowledged by interviewees.

- More information about the availability of accessible destinations could trigger a “virtuous cycle” for businesses. More information can lead to a higher number of tourists. This would in turn increase revenues and sales, thereby making a case for investments in accessibility.

- Geographic accessibility must be extended to non-major destinations. This will increase choice for customers, improve the reputation of the country as an accessible destinations and attract more customers, which eventually drives investments from the private sector.

Annex I: Criteria and justification for best practices

Table 1: Criteria and justification for best practice

Criteria	Justification	On track/off track
Relevance	The latest developments in accessible tourism show that both national level policy (see national development plan) and individual initiatives put forward by public-private associations have had a positive impact in increasing awareness of the strategic role of accessibility. However, the present offer is fragmented both geographically and with respect to disability needs.	
Transferability	Let alone sporadic success cases, there is limited room for transferring specific initiatives to other contexts. More importantly, these positive cases are unlikely to be replicated successfully on a wider scale, due to the limited scope of existing offer.	
Efficient & Effectiveness	The relatively greater impact that a number of Slovenian municipalities have had in making their destinations more accessible is reflected by the receipt of the of the “disabled- Friendly Municipality” charter. Moreover, the effectiveness of the public-private projects was demonstrated by the external recognition given at the European level.	
Sustainability	The successful case shows that even enterprises with socially oriented goals can benefit from playing a role in the tourism market. The majority of the income generated by the most successful enterprise of this type is covered by services provided on a market basis. Training for suppliers willing to provide accessible services, consulting activities aimed at businesses and travel agency services all contribute to covering their operating costs.	

Innovation	The Ulysses prize awarded by the World Tourism Organisation of the United Nations (UNWTO) to Šent demonstrates the innovative approach taken. However, the innovative potential of these organisations is acknowledged at an international rather than domestic level, with negative repercussions on their policy making role.	
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