



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

Case Study 9

Moravian-Silesian Region, Czech Republic

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**European Commission
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Case Study: Moravian-Silesian region

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Executive Summary

The case study focuses on the Moravian-Silesian region of the Czech Republic, which has succeeded in taking accessible tourism provision off the ground in the last decade, culminating to the candidacy of Těšín Silesia among the final five destinations in the European Destinations of Excellence (EDEN) 2013 award on accessible tourism.

Regional operational programmes have been the main strategic and funding vehicles for the development and integration of the supply chain, as they have produced key tools for promoting, training, certifying and making publicly available information about accessible services on offer in various sectors such as accommodation, catering, transport, routes and attractions. The case study draws on the accounts of Kazuist, an educational and consulting SME which has led critical projects in those respects.

Furthermore, the case study includes the perspective of the Bezbatour travel agency, a social enterprise funded by the ESF for the period 2012-2014, which in its first year of full operation has already proved efficient in offering accessible travel packages for people with disabilities across the country. With competitive advantages such as user- assessment of the accessibility of premises and advanced search options of accessible providers on its online database, the company forms a good, highly transferrable example of a niche business in accessible tourism provision.

The impact of these initiatives on the wider supply chain in which they operate should be considered in an otherwise moderately developed context of accessible tourist service provision, which in most cases covers only basic infrastructure principally for physical impairments. Barriers to progress still exist in relation to limited understanding of the benefits of accessible tourism and limited investments unless financial resources are available. Nevertheless, there are lessons to be learnt with regards to factors that facilitate the development of accessible tourism across a chain of suppliers, which the Moravian- Silesian Region continues to support.

1.0 Introduction

The case study focuses on the Moravian-Silesian region of the Czech Republic, as it has featured a number of initiatives in the field of accessible tourism in the last decade, culminating to the candidacy of Tesin among the final five destinations in the European Destinations of Excellence (EDEN) 2013 award on accessible tourism. Regional initiatives have involved destination-level strategies, for tourism as for disability equality, as well as ESF co-funded schemes which have yielded key tools for developing accessibility across a chain of tourist providers.

In particular, the case study draws on the accounts of Kazuist, an educational and consulting SME which has led critical projects such as *Beskydy for all* (2005-2008) the first pilot project in accessible tourism in the country, and the *ATHENA* project (2009-2011) which introduced training, assessment and certification schemes, what have been the main drivers in raising awareness and integrating accessible tourism across the supply chain in the region. The main outcomes include a complete methodology for assessing accessibility of environment and services across the different categories of impairment, the online database of accessible tourist providers jedemetaky.cz with 158 records so far, including businesses, routes and attractions, and the training handbook “Accessible Tourism in a Nutshell” available in Czech and English, targeted at managers and frontline staff in the tourism industry, as well as local policy makers.

Further, the case study includes the perspective of Bezbatour travel agency, a social enterprise funded by the ESF for the period 2012-2014, which in its first year of full operation has already proved efficient in offering accessible travel packages, including accommodation and transport, for people with disabilities across the country. The company is also involved in mapping and assessing the level of accessibility of service provision at accommodation establishments and points of interest, as well as making such information publicly available so as to enable disabled travellers to make informed choices. The social enterprise is led by people with disabilities, working in management, administration, sales, IT support and web design. The company also works as a training site where people with disabilities have the opportunity to work on attractive career positions and thus enhance their skills for accessing the labour market.

The impact of these initiatives on the wider supply chain in which they operate should be considered in an otherwise moderately developed context of accessible tourist service provision, where barriers to progress still exist related to limited understanding of the benefits of accessible tourism, limited

financial resources or insufficient research and information networks to support the business case of accessible tourism. Taking also into consideration the limited sustainability of externally funded projects, this case study serves to examine transferrable lessons that mostly have to do with initiating development, rather than highly innovative achievements, on the level of accessible tourist service provision.

2.0 Overview and background information

According to the UNWTO report (2012)¹, the Czech Republic accounts for 4% of international tourist arrivals, with a relatively stable number of incoming tourists over the last few years, ranging between 8.6 to 8.8 million. In 2012, a total of 13.6 million guests (residents and non-residents) stayed in accommodation establishments². Up to the end of the third quarter of 2013 that figure reached almost 11 million, after a successful winter season noting a 3.2% increase with respect to the first quarter in 2012, a “poor beginning of the summer season” with 1.3% less guests to the respective season in the previous year, which was however balanced by 1.7% increase of guests in the third quarter³. The number of visitors who were residents in that period increased by 1.9% and non-residents by 1.5%. Still, revenue was decreased as guests stayed for shorter periods, in average 4 days as compared to 4.1 in the previous year.

Taking those figures into consideration, the Moravian-Silesian region holds a relatively fair share of tourism among the 13 administrative regions in the country, accommodating 483,522 guests in 2012, of which more than 385,000 were residents. The main tourist products of the region include skiing, bike tours, water sports, wellness and spa, monuments, folklore, and traditional food and drink. The strengths of **domestic demand** are more evident in a regional report (2011)⁴ which showed that more than 330,000 residents were accommodated for an average of 7.9 overnight stays, while more than 810,000 made short trips with two overnight stays on average. A further trait of tourism on a regional level is the hosting of conferences, whereby around 98,000 participants stayed in the region in 2010, a figure that had also remained relatively stable in the previous years.

The region has been very active in supporting and developing tourism in general through a number of initiatives. A primary role is given to comprehensive marketing campaigns. As it is reported in the Second Yearbook of Tourism 2011⁵, the Moravia-Silesia Region repeatedly receives awards for the tourism website under the domain www.msregion.cz, as well as occupying the third place in the nationwide competition of Regiontour 2012

¹ UNWTO (2012) Tourism Highlights

<http://mkt.unwto.org/sites/all/files/docpdf/unwtohighlights12enhr.pdf>

² Czech Statistical Office (2013)

[http://www.czso.cz/csu/2013edicniplan.nsf/engt/3800357DB5/\\$File/14101318.pdf](http://www.czso.cz/csu/2013edicniplan.nsf/engt/3800357DB5/$File/14101318.pdf)

³ Czech Statistical Office (2013) <http://www.czso.cz/csu/csu.nsf/engkalendar/aktual-cru>

⁴ Czech Statistical Office (2011) http://www.czso.cz/csu/2011edicniplan.nsf/engkapitola/801011-11-eng_r_2011-16

⁵ http://www.msregion.cz/assets/aktuality/rocenka_2011_kor5.pdf

for the second time. It is further noted that there is steady growth in the number of tourists since 2010 and throughout 2011, rendering it the fourth best performing region in that respect, what is considered a success given the economic climate of that period.

The region has been further active in exploiting funding opportunities available through regional operational programs 2010-2013 which have included the theme of Tourism for all. As explained in the National Annual Tourism Report (2012)⁶ to the European Commission, the theme of accessible tourism has been part of national development policy with the aim to decrease seasonality and generate new jobs through creation of new tourism products and incorporation of new target groups, such as disabled or elderly groups. Subsidy programs at a rate of 50% of expenditure have been made available for improving tourist businesses infrastructure, attractions and information systems for disabled tourists. Nevertheless, it is worth noting here that accessible tourism does not seem to be mainstreamed in the most recent *Czech Tourism* national tourism marketing strategy for 2013 to 2020.

Preceding regional plans on disability equality may have also added to the readiness of the Moravia-Silesia region to exploit development policy with regards to accessible tourism. The first regional strategic plan for enhancing “equal opportunities” for disabled people was approved in 2004, later in 2006 and thereafter included in the 2009-2013 Regional plan⁷. The plan aims at social inclusion through removal of barriers in transport, information and the built environment, among other sectors such as education, employment and healthcare. Particular successful examples of implementation which are reported include the regional authority’s support to the non-profit sector which provides support services to disabled people, as well as the establishment of a dedicated committee within the authority working in ongoing cooperation with local disability representative organisations.

It was within that context that key projects such as *Beskydy for all* (2008), the *ATHENA Project* (2011) and *Tourism without Barriers* (2009) were funded. The main output of the first project was the database jedemetaky.cz of tourist providers in the region and the necessary methodology to evaluate accessibility in tourism facilities, especially in hotels and restaurants. The database included detailed information on the level of accessibility of the facilities and services offered, according to which providers were classified as accessible, partly accessible or not accessible. The database was further developed in subsequent projects, adding tourism routes and attractions,

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http://ec.europa.eu/enterprise/sectors/tourism/files/annual_reports/2013/czech_republic_report_2012_en.pdf

⁷ http://verejna-sprava.kr-moravskoslezsky.cz/assets/publikace/opportunity_plan_for_disabled.pdf

while it also served as a tool to map potential candidates for the training of personnel in tourist services, which formed the objective of the ATHENA project. Research aimed at identifying needs on the demand side as well as perceptions of disability and accessibility on the supply side was also carried out as part of the *Tourism without Barriers* project (led by KLACR, a regional tourist cluster), which has also fed into the efforts to raise the profile of accessible tourism among the supply chain.

It is finally worth mentioning an initiative implemented by the regional authority concerning the production of “Tactile maps of the Moravia-Silesia Region for the blind and partially-sighted” in November 2011, as quoted in the region’s Yearbook for Tourism 2011.

Box 1: Tactile maps of the Moravia-Silesia Region for the blind and partially-sighted

The MSR is the second region in the Czech Republic that has had such maps created. They are plastic and color-coded maps, which allow blind and partially-sighted people to better understand the layout of the MSR. The maps carry orientation points for important landmarks, attractions, mountains, bodies of water, towns, roads, etc. With the help of these maps visually impaired people can get a comprehensive overview of the given area and be better prepared to move around in the chosen location. A total of 60 sets of maps were made at a total value of 400,000 CZK.

The Moravia-Silesia Region approached more than 60 entities providing services for the visually impaired for the purpose of donating tactile maps. Maps have been donated to schools focused on visually impaired children and youth, Tyflocentrum, selected Information Centres in the MSR, but also beyond these, to MSR libraries and other facilities, which care for visually impaired people. The recipients provide the maps, for hire, to interested parties. Two maps are freely available at the RO MSR (Regional Office- Moravia-Silesia Region) and several tactile maps are located at the Department of Tourism MSR for the purpose of holding presentations at Trade Fairs.

Yearbook of Tourism 2011

Moravia-Silesia Regional Authority

3.0 The integration of the supply chain

The main factors that have facilitated the creation of an accessible supply chain in the region, mainly in the accommodation and catering sector, owe primarily to the assessment methodology and audits/ certifications that have been carried out at each instance by the companies Kazuist and Bezbatour travel agency interviewed for this report, as much as to the fact that the outputs of those schemes have been incorporated into user friendly information systems (online databases) which offer advanced search options and detailed information about available services and facilities to the public. At the same time, these tools serve to promote accessible tourism and attract companies who can register their facilities on an ongoing basis.

The first database of this kind jedemetaky.cz was created in 2008 in the framework of the regional and EU co-funded project *Bedynsky for All*, which at a pilot stage included accommodation and catering establishments in the area of Těšín Beskydy and Pobeskydí, around 20 in number at the time. The first national assessment methodology on physical accessibility was elaborated by the project team so as to survey establishments, which was based on national and international accessibility standards with regards to the built environment. The participation of businesses in the audit scheme was voluntary and mostly an outcome of promotion and outreach efforts of the project team.

The database was later expanded as part of the project *Tourism without Barriers- Moravia-Silesia for All* (2009) to include businesses in the accommodation and catering industry across all regions of the country, as well as information about attractions and routes. At each instance there is detailed tourist, location and contact information, description of existing or possible barriers and available accessibility features at the premise as much as in the surrounding areas. In the “attractions and routes” section, visitors can search the database by selecting the area or city, the reaching distance of available sites, as well as the type of premises they wish to visit, such as parks, monuments, museums, exhibitions, churches, or walking, cycling and nature trails.

The accommodation and catering section can be searched by region, type of business, type of disability (hearing, visual and mobility) and availability of certification of businesses. The certification scheme had also been an outcome of the projects implemented, which has meant that it has not been possible to sustain audits after the end of the funding period. Nevertheless, questionnaires and checklists have been available to businesses who wish to evaluate their own premises and register their venues online. In the Moravia-Silesia region, the database currently hosts 23 certified accommodation and catering facilities and 66 non-certified businesses. Each record contains full

contact and how- to- get- there information, description of available amenities, and information about accessible facilities. That is not to say however that all registered providers are fully compliant with accessibility standards. In the contrary, there remain noticeable gaps in the supply chain, as many attractions and routes remain inaccessible, while there are also great limitations with regards to provisions for different impairments as discussed in more detail in the next section.

Box 2: Barrier-free certification, by Kazuist



BARRIER-FREE is a certified mark awarded to barrier-free facilities providing accommodation and catering services (the mark is not relevant for tourism attractions and tracks because of a different assessment methodology). A facility identified by the Barrier-Free mark is suitable for people with locomotive, visual and/or hearing impairments in terms of services provided. The mark is valid for 2 years.

Turning to the case of the Bezbatur travel agency, it forms a vivid example of a private tourist provider who engages with a variety of suppliers in order to provide accessible travel packages to disabled groups, but also seniors and families with small children. The company began offering travel packages on behalf of other tour operators in 2013, after having completed first audits to the accommodation venues involved. The company's role thus mediates so as to link customer demand to available services, as much as to ensure compliance and consistency with accessibility standards across a chain of suppliers.

The company cooperates directly with transportation companies, tour operators, accommodation facilities, guides (for sightseeing tours), sport activities providers as well as providers at different attractions such as river cruises, across the country. Their wider network of consultants also includes organizations of people with disabilities and disability support services, the Association of the Czech Travel Agents and Tour Operators, the Czech

Tourist Authority, as well as experts in different areas, such as tourism, economic management and business planning.

The database of accessible tourist venues and services, which are included in the travel packages, was created on the basis of accessibility audits carried out by employees of the travel agency along with volunteers from disability organizations. The assessment methodology used has been based on national standards as well as consultations with representatives of people with physical, visual and hearing impairments. As reported by Karolina Špačková, Manager of Bezbatour Travel Agency, the majority of accommodation facilities cooperate without any reservations, *“probably because we treat them as business partners from the first contact”*.

Further to objective measurements, the fact that the audits are realised by the user groups concerned adds to the validity of the outcomes. Information gathered about the range and level of accessibility of services is posted on the website through systemised checklists, along with photos, in order to aid individual customers to decide on the suitability of facilities according to individual access requirements (please see Table 3 of advanced search options available). At the moment there have been 60 verified accommodation premises, including the Moravia Silesia Region.

As pointed out by the interviewee, there remain nevertheless significant gaps in the supply chain as regards accessible tourist services. Particularly in the field of transport, there are not many private providers of accessible transport. Most adapted vehicles are mini buses or vans, while the company cooperates with just one company which offers a wheelchair accessible bus with bigger capacity. Furthermore, it was pointed out that tourist infrastructure across regions needs further development in general with noticeable gaps in provision of accessible public toilets, accessible public transport, and tourist information services regarding the accessibility of places of interest in their region.

Table 1: Bezbatour Travel Agency- Advanced Search Criteria

Select the accessibility criteria of accommodation facilities that match your requirements.

All items from Advanced Search are optional. If entering multiple parameters for one accommodation object, only one of them doesn't meet your needs, this object will not appear in the search results. Therefore, consider carefully the importance of each parameter.

Room

- On the ground floor
- Double bed
- Single bed(s)
- An extra bed possible
- Sufficient space next to bed
min. 90 cm
- Electric adjustable bed
- Under-bed space for the hoist
min. 15 cm
- Accessible switch
60 - 120 cm
- Emergency button to call for assistance

Bathroom

- Wheelchair accessible entrance to the bathroom
Entrance door width min. 80 cm
- Wheelchair accessible shower
Min. size 90x90 cm + no steps or max. 0,3 cm step
- Shower chair
- Grab bar in the shower
Min. number of bar handles in the shower: 1
- Shower mixer at accessible height
60 - 120 cm
- Toilet grab bar to the right
- Toilet grab bar to the left
- Easy access to wash basin
Basin height 80 cm + under-basin space
- Wash basin lever mixer
- Mirror at accessible height
Lower edge max. height 90 cm

Restaurant

- Wheelchair accessible entrance to restaurant / dining room
Entrance door width min. 80 cm
- Sufficient wheelchair access to table
Min. space under the table 70 cm + Possibility to move chairs aside
- Toilet at restaurant / dining room

Min. entrance door width 80 cm + grab bars to the right and left of the toilet + min. size 160x160 cm

Other facilities for people with disabilities

Accessible entrance to accommodation facility

Entrance door to the building is on the road level or accessible by ramp or by elevator + min. entrance door width 80 cm

Elevator call button at accessible height
60 - 120 cm

Spacious elevator
min. 110 x 140 cm

Buttons in elevator at accessible height
60 - 120 cm

Portable hoist loan

Assistance dogs accepted

4.0 Provisions for cross-impairments

The main finding of the case study with regards to provisions for access needs across different impairments in the supply chain is that in practice this has been mostly limited to physical impairments and wheelchair users in particular, while accessibility has mainly concerned infrastructure rather than other aspects of customer service.

With a quick search through the 158 providers in the accommodation and catering sector which are registered at the jedemetaky.cz database, one can understand that most businesses are only partially compliant with accessibility standards. Most businesses seem to offer basic accessible facilities, such as an accessible entrance, room and/ or toilet. This is also true for registered attractions and routes, which in many cases can be practically inaccessible (being registered on the database does not automatically mean they are accessible). Examples include lack of access to the floors of a museum where exhibitions are placed, access to the entrance only possible with assistance, or difficult terrain conditions in walking routes.

Additionally, a common finding in these cases is that details about accessible features or alternatively existence of possible barriers on the database typically concern physical impairments and physical infrastructure only. This is despite the fact that audit tools have included criteria for hearing and visual impairments, as well as that there are businesses certified as barrier-free for people with visual and hearing impairments. Even in such cases, no evidence or information is available online regarding the aids or services provided for such access needs.

This focus on physical impairments is also evident in the case of the Bezbatour travel agency, even though the agency aims at meeting each individual customer's needs, including learning disabilities, visual or hearing impairments, or diet needs, as explained. For instance, looking at the available filter options by profile of customers on the database, these involve those "with physical disability", "families with children", "senior citizens" or "other". Advanced search criteria online are also available for physical impairments exclusively.

To a lesser extent, information exists in each record about the availability of certain features, such as natural tactile cues for visually impaired, or bell at the entrance or reception of the hotel. More detailed information about provisions for different impairments are gathered through the audit questionnaires, such as availability of lifts equipped with voice output, tactile marking of the floors, or entrance door of a room or a menu in Braille in hotel

restaurants. In any case, depending on each customer's specific requirements, further information is obtained in direct contact with suppliers, so as to ensure best available options.

This almost exclusive emphasis on physical access requirements seems to owe to the limited provisions for cross impairments on the supply side, rather than to limited knowledge on access standards for a variety of needs on behalf of the consultants or auditors. As it was emphasized by Ms. Jana Szczuková, Project Manager at Kazuist, there tends to be an oversimplification of what accessible tourism provision entails by the suppliers which rests on physical adaptations for wheelchair access. This in turn is an indication of a limited understanding of the benefits of accessible tourism for business development, as discussed in the following section.

5.0 Business approach – building a business case for accessibility

Both SMEs which participated in this study specialise in accessible tourism provision, Kazuist as a consultation and certification business, and Bezbatour as a travel agency directly involved in offering accessible travel packages. In both cases, promoting accessible tourism and barrier-free travelling form part of the very business objectives, therefore investments in that direction are mainstream practice. Unfortunately, it has not been possible to investigate perceptions of cost and benefits of a supplier for which accessible services have formed part of other mainstream services.

Using the perspective of Kazuist and their experience of working with tourist providers as a proxy, although not an absolute statement, it seems that there remains a problematic perception of disabled customers which obstruct an understanding of the business benefits of approaching this clientele. As reported, there is resistance in investing in accessible service either because managers consider adaptations expensive, or are ignorant of less costly solutions or because there is no legislation that obliges them to do so. It was also reported that participation of businesses in certification and training schemes required extensive outreach efforts on the behalf of the consultants, while it has also become evident to the company that any investment in this direction was possible when funding had been available to cover these costs.

Perhaps the most prominent transferrable lesson which comes out of this case study is the example of the Bezbatour travel agency as a niche entrepreneurship initiative which could be applied in contexts where accessible tourist provision is starting to develop. The initiative encompasses expertise on accessibility, user testing of premises, objective assessment methodology and checklists and a detailed information system with advanced search options which form its competitive advantage in offering travel

packages suited to individual customer requirements. Additionally, as a social company led by the user group concerned, it has been in the position to make good use of available European funding for its start-up.

6.0 Evidence of impact

The case of the Bezbatur Travel Agency serves as a good, highly transferrable example of business initiative in the field of accessible tourism as it seeks to meet customer demand through tourist services on offer, building on available supply but at the same time also promoting provision of accessible tourist services. It is moreover a certified employer of people with disabilities and has also won an award for the best business idea in social entrepreneurship at “The Best Eco & Social Ideas” competition held by the Prague Hub in 2012. The business case made is further justified by repeat business and positive feedback received by its customers.

As reported by the manager of the travel agency, there were 180 customers in the very first tourist season the company began offering its services, while there is an increasing number of members of the company’s webpage on social media. There are many return visits from satisfied customers, while feedback on provided services has been positive as a whole. There are nevertheless cases where clients have expressed expectations of a wider range of services, such as more destinations or available facilities/ services at destinations, which perhaps indicates that there is ground to be covered in accessible tourist service provision.

The lessons learnt from the projects implemented by Kazuist tell perhaps a more complicated story as they have been successful in realizing their objectives in setting off accessible tourism provision from ground zero on the one hand, on the other the long-term results on the supply side have been rather moderate in terms of restoring accessibility across a chain of providers, providing for different access needs or developing accessible customer service, as discussed.

The expansion of the database of www.jedemetaky.cz to include 158 providers in the accommodation and catering sector alone, starting from just 20 at the pilot stage, seems to be a good indicator of the success of the overall awareness raising efforts of the projects. The self-assessment methodology as well as the training content developed in the framework of the projects led by Kazuist, have remained available to tourist providers who wish to get involved and register their venues on the database. Meanwhile, the spreading impact may also be traced in new regional developments such as the web platform www.ms-dovolena.cz/ which maps tourist provision in the Moravia Silesia region focused on target groups like seniors, families with small children, disabled people, people with diabetes or food allergies.

Perhaps the high ranking of the region of Těšín Silesia in the European Commission’s award EDEN 2013 for Accessible Tourism Destinations,

among the final five destinations, is perhaps recognition of the efforts that are taking place at a destination level.

Nevertheless, there remain barriers to potentially increased exploitation of the available tools, which the project manager from Kazuist relates to limited awareness raising and promotion of accessible tourism among the general public, policymakers and businesses, especially outside the limits of a funded project. There is similarly limited motivation by tourist providers to engage in accessible tourism, which is even more observed in periods when there is absence of any funding schemes.

7.0 Conclusions

The case of the Moravia-Silesia Region is helpful in gaining insight into factors that encourage and facilitate the development of accessible tourism service provision quite “from scratch”. In this case, this has been a process in which the local authority, consulting SMEs, social enterprises and tourist businesses have all fed into. It is characteristic that the main tools that have enabled integration of accessibility across the tourist supply chain owe to EU co-funded projects, which despite their short life span in each instance they have produced a basic knowledge base and information systems on which further developments have and can be further built on.

Thus, in terms of available strategies at a destination level, regional operational programmes have been the main strategic and funding vehicles for the development of accessible tourism provision. At the same time local disability equality plans, although not directly related to tourism, have also got a role to play in increasing the readiness of the authorities to mainstream policies that aim at the removal of barriers across different sectors.

As a direct result of funding programs, the first methodological tools for the assessment and certification of tourist services providers were developed and applied to create jedemetaky.cz the first database of tourist providers across the country, classified as accessible or partially accessible, with detailed description of the range and level of accessibility of services provided in each case. Providers include the accommodation and catering industry, which have reached 158 in number, as well as routes and attractions, what is a strong indication of the impact of those initiatives in raising the profile of accessible tourism in itself. The development of the regional search engine of tourist providers <http://www.ms-holiday.cz/> filtered by the profile of visitors (physically or visually impaired, elderly or small children) has been a further

example of spreading impact, as is also the case of travel agencies engaged with offering accessible travel packages to disabled groups, such as Bezbatour. Some personnel training has also taken place in the framework of projects, although this does not form common practice.

Positive feedback on the demand side is moreover reported by the Bezbatour travel agency, a social enterprise funded through the ESF, which served 180 disabled customers in the first year of its operation. Nevertheless, customer expectations for improved and widened range of accessible services remain.

Reviewing the level and range of accessibility of services across the supply chain on the available databases, it becomes quickly evident that the great majority of providers are only partially accessible. Adaptations seem to be limited to wheelchair access needs, while these are also partial, and relate mostly to basic infrastructure (e.g. entrance, WC), rather than service and full range of facilities. Assessment methodologies and subsequently search filters in the available databases are also much more focused on wheelchair access. There is still ground to be covered therefore in achieving higher standards of accessible service provision.

Some of the main barriers that have to do with understanding the benefits of accessible tourism and investing in universal design still exist, despite some successful steps in training and engaging businesses with accessible tourism provision. This can be partly explained by the limited sustainability of the initiatives which have taken place so far due to their dependency on external funding, as well as to the limited financial resources available to businesses through funding programs. This has meant not only disruptions in business investments, but also in the working of third parties, such as consultation businesses, which have been key in raising awareness, providing training and implementing assessment and certification schemes. Similarly, sustainability is needed to ensure the building up of the business case for accessible tourism, which is still in its very early stages in the destination reviewed.

8.0 Recommendations

Improving financial sustainability

Financial support at start up as well as for investments in accessible service provision in the tourist supply chain is perhaps one of the main recommendations put forward in this case study.

As reported, the start-up of the Bezbatour Travel Agency would not have been possible without the support of ESF funds. Similarly, tools which have been key for triggering the development of accessible tourism at a destination level, such as certification and training schemes as well as comprehensive online information systems, have been created within the framework of co-funded regional projects. Support in the form of funding is equally important for the suppliers since, according to the project manager of Kazuist, available funding schemes determine the readiness of tourist providers to invest in accessibility, either in terms of physical adaptations, improvement of facilities for different access needs or training of personnel in accessible customer service.

Education and competence development

Developing know-how and competencies required in providing accessible tourist services, as much as for motivating stakeholders to invest in accessible tourism, was also one of the key recommendations raised.

For the Bezbatour travel agency, it was rather lack of experience and expertise in tourist services in general and a limited business orientation which presented obstacles at the beginning of the initiative. As explained, this was overcome with practice and by consulting experts in the field, such as other travel operators, by studying legislation, by visiting travel markets and negotiating with partners.

Finally, high level competencies are required for a successful business in accessible tourism provision, as with any other business, in terms of:

- Building up a trustworthy information service about accessibility
- Providing quality customer service
- Targeted marketing

Annex I: Criteria and justification for best practices

Table 2: Criteria and justification for best practice

Criteria	Justification	On track/off track
Relevance	Regional operational programmes have been the main strategic and funding vehicles for the development of accessible tourism provision. Local Disability equality plans, although not directly related to tourism, have also got a role to play in terms of having strategies in place at a destination level. Good information systems have been set up – by the private and public sector-with detailed information on the range and level of accessibility of services provided, mainly for wheelchair users and visually impaired individuals. Providers include accommodation, catering, routes and attractions, although the great majority are only partially accessible so far.	
Transferability	A lot of the barriers that have to do with understanding benefits of accessible tourism and investing in universal design (not just partial access for some impairments) still exist, despite some successful steps in training and engaging businesses with AT. Having in place information systems seems to have been a key intervention for developing assessment and certification schemes on the supply side, as much as better travelling experience on the demand side. This is perhaps most unique feature of the case study, upon which further businesses such as travel agencies have built on to provide travel packages to disabled groups.	 
Efficient & Effectiveness	Positive feedback is reported by the travel agency which served 180 disabled customers in the first year of its operation, although expectations exist for improved and widened services. Measurable outcomes also include the 158 providers on the online database of http://www.jedemetaky.cz , as well as the development of online regional search engine	 

	<p>of tourist providers filtered by profile of visitors. Although limited facilities are fully compliant with accessibility standards, an increasing number of providers are being certified as partially accessible. Some personnel training has also taken place in the framework of projects, although this is not common practice. The ranking of Tesin in the top five destinations of the EDEN 2013 award signals nevertheless a recognition of the efforts taking place in the region for developing accessible tourism on a destination level.</p>	
Sustainability	<p>Limited sustainability of certification schemes/ training or marketing campaigns due to dependency on external funding. Businesses also depend on available funding for adaptations, certification or training of staff. The case of the travel agency also shows significance of available finances for start-up, however possible to sustain business based on profit.</p>	
Innovation	<p>As described above, providers limit adaptations to wheelchair access needs. These are also partial, and affect mostly basic infrastructure (e.g. entrance, WC), rather than service and full range of facilities. Information systems and specialised travel agencies also seem to focus on wheelchair users. As reported, there is still ground to be covered in achieving higher standards of accessible service provision.</p>	