



SLOVENIAN TOURISM STRATEGY 2022-2028

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PROJECT

Slovenian Tourism Strategy 2022–2028

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0. INTRODUCTION

0.1 Strategy for "a green and boutique Slovenia, with a reduced footprint and greater value for all"

At the beginning of the new strategic period, Slovenian tourism stands at a crossroads

At the time of adopting the development strategy 2022–2028, Slovenian tourism stands **at an important crossroads between recovering from the health-related consequences of the COVID-19 pandemic and the emergence of new security and political threats and risks associated with the war in Ukraine.** On the one hand, current circumstances are changing market conditions and further exacerbating the situation, while, on the other hand, they are highlighting **structural imbalances on the supply side of Slovenian tourism that had already existed before the crisis.**

Tourism as a generator of sustainable exports of many services and products

The tourism industry in Slovenia focuses not only on the hospitality and accommodation sectors, food and beverage services, spa resorts, travel agents, transport operators and tourist guides, casinos and other direct tourism service providers, but, as a small country, it is strongly geared towards international openness and depends on the success of exports to international markets. Above all, **its role is becoming increasingly evident as a market generator for the more favourable sale or sustainable export** — without long logistics routes — of a wide range of products and services, merged to create adventures and experiences for tourists and day-visitors.

Cohesive and coordinated action by all is key to increasing competitiveness

The competitiveness of Slovenian tourism is created in various parts and levels of the private and public sectors. It is forged in local communities, where visitors become familiar with Slovenia's range of tourism products and services, as well as at the national level, where the conditions for the operation and promotion of all tourism-related activities are set. The coherence and coordination of all stakeholders and levels of Slovenian tourism is **key to achieving a higher level of competitiveness and greater value for all, which is this Strategy's essential orientation.**

The Strategy, based on the principle and chosen development scenario of "a little bit more and a lot better", has a strong focus on increasing quality and value added.

Unlike in previous periods and in line with the findings of the key analytical development indicators, the tourism development strategy in the 2022–2028 period **focuses more inwards, on the supply side of Slovenian tourism.**

The key orientations, policies and measures are geared towards significantly improving the quality of services and management at all levels, the quality of human resources and working conditions in Slovenian tourism, and the quality of investments, as well as towards delivering on the promise of a green and sustainable supply of products and services not only in promotional campaigns but also in practice, targeting more demanding markets, segments and products with high value added, enhancing Slovenia's boutique portfolio, taking into account the carrying capacity of natural and touristic areas, integrating Slovenia's authentic cultural elements into tourism products and services, and effecting the digital transformation to

achieve greater efficiency and increase the value chain of Slovenian tourism. All this has the aim of creating higher value added for all stakeholders and a positive impact on Slovenia's identity and success.

In the new strategic period and the "new normal", Slovenian tourism needs an upgraded, transformative vision that will unite us in the urgently needed shift towards more balanced and resilient tourism, with a more pronounced character of Slovenian identity, a decisively higher value added and which will be in the interest of all stakeholders. In tourism, we seek to create somewhat more than in the previous period, but, above all, we want it to be of much better quality and a lot better – for everyone.

Slovenian tourism stakeholders' decision for the next strategic period is to **pursue the strategy of "a little bit more and a lot better"**, aimed at moderately increasing capacities and physical indicators of development, but, above all, at significantly increasing quality and competitiveness and creating greater value for all.

Green boutiqueness. Smaller footprint. Greater value for all.

Slovenian tourism's vision, which mainly addresses **the transformation of the supply side** and focuses on responsible, more demanding guests, is **"Green boutiqueness. Smaller footprint. Greater value for all."**

12 key challenges > 5 strategic goals > 20 development goals > 7 key policies + 3 horizontal policies = 94 measures

Based on the **12 key challenges** identified in the analysis of Slovenian tourism, the Strategy sets out **5 strategic (broader) and 20 development goals for** Slovenian tourism, which are aimed at addressing the challenges.

In order to achieve the goals set, the Strategy identifies **7 key strategic policies** geared towards achieving the goals and **3 horizontal policies** that support the implementation of the key strategic policies. Within the key strategic policies, **94 specific measures have been planned, grouped into 23 policy areas/sub-policies.**

An estimated EUR 1.54 billion in investments is needed to achieve these goals and vision

The indicative estimate of the investments needed from all public, private equity and commercial debt financial sources to achieve the Strategy's goals in all areas and at all levels of Slovenian tourism over the whole strategic period stands at **EUR 1.54 billion**, under the policies covered by the measures. Together with additional private sector investments not directly covered by the measures, the indicative estimate of the necessary and projected development investments amounts to **EUR 2.3 billion.**

Through robust investments, various anti-crisis measures to shore up the industry and jobs during the COVID-19 health crisis, the Government of the Republic of Slovenia (hereinafter: the Government) has provided a good starting point for further growth and development of the industry. Furthermore, **with the already planned and secured public funding to support the development of tourism through various EU funds and regularly planned budgetary resources, which comprise a total of EUR 324 million** for the entire strategic period, the Government provides a very good basis for triggering further and overall development investments from various public and private sources, indicatively identified in the Strategy.

From core quantitative indicators to indicators that show an increase in value and quality

With a strong focus on improving its quality, competitiveness, and sustainability, and with even more targeted marketing activities in Slovenian tourism, **the development indicators** are projected to be achieved by 2028. **They are defined mostly in terms of value and quality rather than in terms of quantitative goals:**

1. Increasing the total value added in the core tourism sector as a whole to EUR 1.3 billion per year (+ 43% compared to 2019), the value added per employee in the accommodation (hospitality) sector to almost EUR 60,000 (+ 64%) and in all tourism-related industries to an average of EUR 40,000 (+ 34%);
2. Increasing inflows from tourism travel exports to EUR 3.9 billion (+ 39%);
3. Decreasing the GINI index value for measuring seasonality in Slovenian tourism from 0.27 in 2019 to 0.23 (–15%), i.e. below the EU average of 0.24 in 2019;
4. Increasing the average length of stay of tourists to 3 nights (+ 20%, taking into account touring guests staying in Slovenia in different destinations during the same visit);
5. Increasing the satisfaction of guests with Slovenia's range of tourism products and services;
6. Increasing the satisfaction of Slovenian population with the development of tourism in tourist destinations;
7. Increasing the industry's inflow and employee satisfaction in the tourism industry through an increase in average wages throughout the industry (+ 35%);
8. Increasing the share of tourism and tourism-related industries in Slovenia's GDP (+ 1% percentage point);
9. Increasing the number of employees in tourism (+ 8-10%);
10. Reducing the carbon footprint of Slovenian tourism per overnight stay from 39.9 to 30.3 kgCO₂eq/night (–33%);
11. Increasing the quality of public services, the amenities and performance of tourist destinations;
12. Increasing the quality of management and public management structures of Slovenian tourism at all levels, with the aim of increasing efficiency, the amount of tourist tax collected, funding for destination management, and inflows from tourism to the local and state budgets;
13. Improving performance indicators and the quality of management at the business level by increasing occupancy rates (+ 11% and 4% points respectively), and increasing revenues and value added per actual overnight stays (+ 64%).

The need for continuous monitoring and quick responsiveness

The COVID-19 pandemic has shown how tourism can be severely affected by an unexpected critical event. It is therefore essential to constantly monitor likely risk events that could have negative consequences for Slovenian tourism, to quickly put in place emergency response plans and measures as needed, and assess the extent to which a particular critical event will negatively affect the implementation of the Slovenian Tourism Strategy 2022–2028.

During the Strategy's development, the effects of the COVID-19 crisis collided with a security and political crisis due to the war in Ukraine and the resulting tense international geopolitical relations. The Strategy also identifies a specific measure to mitigate the negative effects of the post COVID-19 crisis and other critical events in the international arena on the recovery and relaunch of Slovenian tourism, which, in light of exceptional events, would secure funds to reduce negative effects and sustain the industry.

Continuous and active cross-sectoral and inter-ministerial cooperation will be key to achieving the goals and vision

With a view to achieving the strategic and development goals, the guidance and management of the Strategy implementation is based on the establishment of cross-sectoral and inter-ministerial cooperation, the enhancement of the value chains in tourism and the coordination of measures and activities between local and national levels.

The action and financial plan, which will follow the Strategy's adoption, also foresees the coordination and integration of the measures of various ministries in order to achieve synergies between several areas and sectors simultaneously.

The cross-sectoral and inter-ministerial principle, and the nature of tourism, are both a fundamental feature and also the orientation of a development strategy to increase the value of tourism in the period up to 2028.

0.2 Methodology for the Strategy's development and structure of the document

The entire document is structured around 10 chapters that are organised in accordance with the international planning methodology and grouped into 5 thematic sets or planning phases: (1) Situation analysis, (2) definition of vision and goals, (3) formulation of the Strategy, (4) definition of concrete measures and action plan, and (5) organisational and management model for monitoring and evaluating the Strategy's implementation.

Figure 1: Illustration of the structure of the integral document: 5 sets and 10 chapters



Figure 1: Illustration of the structure of integral document: 5 thematic sets and 10 chapters

Sklop 1	Thematic Set 1
ANALIZA STANJA	STATE OF PLAY ANALYSIS
POGLAVJE 1:	CHAPTER 1:
Analiza in diagnoza stanja	Analysis and diagnosis of the state of play
POGLAVJE 2:	CHAPTER 2:
Mednarodna primerjalna analiza	International benchmarking
POGLAVJE 3:	CHAPTER 3:
SWOT analiza	SWOT analysis
POGLAVJE 4:	CHAPTER 4:
Scenariji razvoja turizma	Tourism development scenarios
z analizo izgubljenih koristi	with analysis of lost benefits

Sklop 2	Thematic Set 2
VIZIJA	VISION
POGLAVJE 5:	CHAPTER 5:
Izbran scenarij na osnovi katerega so opredeljeni ključni elementi prihodnjega razvojnega koncepta	The selected scenario on whose basis the future development concept's key elements are defined
Vizija, poslanstvo in cilj razvoja slovenskega turizma	Vision, mission and goal of the development of Slovenian tourism
Sklop 3	Thematic Set 3
STRATEGIJA	STRATEGY
POGLAVJE 6:	CHAPTER 6:
Ukrepi po politikah	Measures by policy
7 ključnih politik	7 Key Policies
1. Naložbe in podjetniško okolje	Investments and the business environment
2. Javna infrastruktura in dediščina za turistični ambient	Public infrastructure and heritage to improve tourism character
3. Človeški viri	Human resources
4. Trajnost in ZSST	Sustainability of the Green Scheme of Slovenian Tourism
5. Dostopnost in mobilnost	Accessibility and mobility
6. Upravljanje destinacij in povezovanje turizma	Destination management and tourism integration
7. Produkti in trženje	Products and marketing
3 horizontalne politike	3 Horizontal policies
8. Digitalna preobrazba slovenskega turizma	Digital transformation of Slovenian tourism
9. Usmeritev politike na zakonodajnem in finančnem področju	Policy orientation in legislative and financial terms

10. Institucionalni okvir in horizontalno medresorsko upravljanje in usklajevanje	Institutional framework and horizontal inter-ministerial governance and coordination
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Sklop 4	Thematic Set 4
AKCIJSKI NAČRT	ACTION PLAN
POGLAVJE 7:	CHAPTER 7:
Ukrepi in akcijski načrt za uresničitev SST 2022-2028	Measures and action plan for the implementation of the 2022–2028 SST
POGLAVJE 8:	CHAPTER 8:
Finančni načrt za uresničitev SST 2022-2028	Financial roadmap for the implementation of the 2022–2028 SST

Sklop 5	Thematic Set 5
SPREMLJANJE & VREDNOTENJE	MONITORING & ASSESSMENT
POGLAVJE 9:	CHAPTER 9:
Vrednotenje, spremljanje in organiziranje izvajanja strategije	Assessing, monitoring and organising the Strategy's implementation
POGLAVJE 10:	CHAPTER 10:
Zaključna priporočila za uspešno realizacijo strategije	Final recommendations for the Strategy's successful implementation

1. SITUATION ANALYSIS AND DIAGNOSIS OF SLOVENIAN TOURISM

1.1 Basic premises

SLOVENIAN TOURISM — STARTING POSITION 2017–2019/2020

Slovenia's starting position as a tourist destination on international markets is relatively good thanks to successful and consistent marketing communication in recent years. A much bigger challenge is the tourism industry's actual state of play, which, without appropriate measures, will negatively affect our competitiveness. While Slovenia has exceeded the planned volume of tourist arrivals in recent years, the growth in inflows is far behind the forecast figures, while the length of visitors' stay has even shortened. The value added per employee in the tourism industry only accounts for half of the Slovenian average. The average level of service quality has decreased in view of the fact that growth has been achieved mainly in the less demanding and cheaper accommodation segment. As the users of these facilities benefit to a greater extent from public infrastructure and services, some destinations are already facing excessive pressure on their environment and the local community during peak times. Over the past period growth was intense, but it already slowed down to 1% of total overnight stays in 2019, and in the hotel sector there was even a decline in overnight stays, which points to the structural challenges of Slovenian tourism.

The recent strategic period in the development of Slovenian tourism (2017–2021) can be described as a period of intense growth until the beginning of the COVID-19 pandemic. Tourism has become an important sector of the economy, with all related industries (direct, indirect and induced effects) contributing 9.9% to Slovenia's GDP, 3.9% to value added and employing 6.5% of the total labour force in Slovenia in 2019. In 2019, direct and indirect tourism sectors together contributed 6.5% to Slovenia's GDP, 3.1% to Slovenia's total value added and employed 5% of Slovenia's working population.

Slovenia has successfully positioned itself on the international market as a green, healthy and active destination. The number of overnight stays increased by 35.4% in 2019/2015, which is double the growth rate of the EU27 (15.6%). Driven by favourable market conditions and strong demand, the number of less demanding and seasonal accommodation facilities has increased by approximately 10,000 rooms. The destination concept has been well received by providers and effectively established on the market. The vast majority of tourism stakeholders has, at least in principle, accepted and adopted a green orientation and a return to local sources of supply. The Slovenian Tourist Board has consistently implemented the agreed marketing concept and has firmly positioned itself among the most professional national organisations. Progress has been made in digital marketing. A major step forward — including a place on Michelin's best-of list — has been made in the art of cuisine. Significant steps have also been taken regarding tourist taxes, categorisation and some other legislative solutions.

Success has been achieved in terms of international marketing positioning but much less so in the development measures envisaged.

The development function envisaged in the previous strategy, which would have linked and steered development projects at both destination and inter-ministerial levels, has not been established at either the Ministry of Economic Development and Technology or at the Slovenian Tourist Board; the planned regional and integrated tourism development plans have remained on paper only. Tourism grew to the greatest extent on its own, strong demand was boosted by high-quality marketing campaigns, and we have responded in the simplest way at the investment level. One of the most remarkable results of steep but untargeted growth has been the increasingly problematic structure of accommodations, which overwhelmingly provide merely basic levels of comfort. The share of hotels in the total number of permanent beds fell from 30% to 25% between 2015 and 2019, while the share of private rooms, apartments, hostels and campsites increased from 35% to 51%. As a result, seasonal peaks are increasingly pronounced, revenue growth is lagging behind the growth

of physical output, and the average quality and value of our services is declining, while the environment, public services, transport and infrastructure are facing uncontrollable pressure, and Slovenia's unit value added and price positioning are declining. Average revenue per night fell by 15% between 2015 and 2019. The overview of the achievement of the goals set by the 2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism in the previous strategic period clearly shows the disproportion between the growth of visits, investments and financial realisation.

Table 1: Overview of the achievement of development goals 2015–2019

	Development goals 2021	Realisation 2019	% Realisation
1	Receipts from the export of travel: EUR 3.7 to 4 billion	EUR 2.75 billion	69–74
2	5–5.5 million tourist visits	6.2 million	113–125
3	16-18 million overnight stays	15.8 million	88–99
4	Average length of stay 3.1–3.4 days;	2.5	74– 82
5	18,000 to 22,000 new tourist rooms, of which 8,500 will be renovated and 6,500 will be new rooms in the hotel sector	+ 10,227 compared to 2015, of which hotel growth is only + 0.3%	47– 57
6	Increasing full-time employment in the tourism industry to 12,000 employees	11,086 (working hours, Sector I55 — hospitality industry)	92

These facts show that there is a growing gap between the promise made to international markets through excellent communication and the actual provision of high-quality services. We have a number of excellent examples that contribute to the industry's reputation. However, in terms of statistical average, the quality of accommodations is falling; the competitiveness of ski resorts is lagging behind; public infrastructure and services, transport and public transport do not sufficiently keep pace with the needs of tourism; there is a lack of air connections to key markets, especially after the collapse of the national airline in 2019; the rail infrastructure and connections, which should be the main green alternative, are outdated, slow and inefficient. The current level of investments is too modest to significantly increase the quality level of the industry; an important part of this backlog is driven by an unsupportive business environment and an overly restrictive regulatory framework.

Human resources are also a major challenge. While the number of people employed in the tourism industry increased by 16% or 17% over 2015 levels in the years preceding the outbreak of the pandemic, the share of qualified staff decreased. The number of trainees in the tourism and hospitality occupations has decreased by 30% and the COVID-19 pandemic has further worsened the situation as a result of industries' shutdown. Slovenian tourism only appears to be in good health. The growth of recent years has, of course, been positive, but it has been concentrated in a segment that moves us away from the desired boutique character and higher value added, and leads us further in the direction of mass tourism. Given Slovenia's exceptional natural and cultural potential, such a concept should be unacceptable, so the structural imbalances in the supply of products and services should be redressed and improved as soon as possible.

The COVID-19 pandemic disrupted the trends of the previous period and cut deeply and asymmetrically into Slovenia's tourism industry and destinations. Large-scale Government intervention has helped to keep most tourism, hospitality and related services, businesses and jobs afloat. The comparison of the state of play in Slovenian tourism with other EU countries, where the drop in GDP from tourism was much higher, suggests that Slovenian tourism has not lost its international competitiveness as a result of the COVID-19 pandemic. On the other hand, the pandemic has exacerbated the industry's usual structural problems, which are reflected in lower than average value added, staffing and quality deficits. This may, in the medium and long term, hamper the recovery and the maintenance of the industry's competitiveness.

2. SWOT ANALYSIS OF SLOVENIA'S TOURISM DEVELOPMENT

2.1 SWOT analysis of the development status of tourism by macro destination (MD)

2.1.1. The Alpine Slovenia Macro Destination

KEY TAKEAWAY	In Slovenia's Alpine region, the Julian Alps stand out as an area that is organised, integrated, and supported by local communities, and the area accounts for the largest part of the region's turnover from tourism, while in the rest of the region, the ideas of integration are still in their infancy. Development challenges need to be addressed through region-specific measures.
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STRENGTHS (S) = We preserve and grow	WEAKNESSES (W) = We overcome
<ol style="list-style-type: none"> 1. Triglav National Park and other safeguarded and protected natural areas 2. A constituent part of the Alps – a widely-recognisable global brand 3. Unique natural and cultural heritage 4. Exceptional range of outdoor activity programmes 5. Alpine attractions included in the most identifiable icons of Slovenian tourism: Bled, Bohinj, Soča, Logar Valley, etc. 6. Recognisable sports destination brands, traditional world-class events: Bled, Pokljuka, Kranjska Gora, Planica, Pohorje, etc. 7. The Julian Alps as an innovative and organised destination community 8. Year-round activity in areas with ski centres 9. Cross-border connections and successful joint products (Alpe Adria Trail, Walk of Peace, Drava Cycling Route, etc.) 10. Integrated connecting tourism products (Juliana Trail, Juliana Bike, Juliana SkiTour) 	<ol style="list-style-type: none"> 1. Poor transport connections within and outside the area, underdeveloped modes of public transport and unregulated stationary traffic 2. Significant differences in destination organisation, management and supportive environment within the MD 3. Lack of staff in the industry 4. Too fast and uncontrolled development of tourism in individual areas, predominance of simple accommodation facilities and programmes 5. Largely outdated and uncompetitive ski infrastructure 6. Cultural and historical heritage potential not sufficiently integrated 7. Visits to sensitive sites and areas in the natural environment are poorly managed (unbalanced promotion of outdoor activities in relation to carrying capacities) 8. Too slow integration of local produce and products into the tourism sector 9. Too weak linkages between tourism and agriculture, too slow development of farm tourism 10. Overgrowth and disappearance of cultural landscapes
OPPORTUNITIES (O) = We seize them	THREATS (T) = We reduce impact
<ol style="list-style-type: none"> 1. Global trends and the post-COVID-19 era promote the Outdoors as a key portfolio of the Alpine macro-destination 2. Continuation and strengthening of cross-border cooperation 3. The reinforcement of environmental responsibility and green trends supports the valuation of the linkage between tourism and agriculture 4. Informed transfer and integration of good practices within the macro destination as well as beyond, strengthening partnership cooperation, creating new products 5. Introducing digital technologies in tourism flow management 	<ol style="list-style-type: none"> 1. Short-staffed tourism industry 2. Rural areas are to a large extent demographically endangered areas, ageing population, young people leaving 3. Unplanned development of low-end and seasonal accommodation facilities 4. Insufficient integration of tourism into local – municipal and regional development programmes, confinement within local boundaries, too many differences in approaches and inability to set common priorities 5. Destination management boards too dependent on their founders for funding and staffing 6. Uncontrolled interference in the natural environment, undirected tourism flows, unbalanced promotion of

<ol style="list-style-type: none"> 6. Strengthening the year-round operation of mountain (ski) centres, encouraging traditional annual outdoor activities in the shoulder seasons and transferring them to winter time 7. Developing a boutique portfolio of services and products for more demanding visitors 8. Developing and strengthening local supply chains 9. Recognising tourism as an opportunity for personal and economic development, for improving the quality of life in rural areas 10. Development funds from the EU and the State budget within the framework of the Recovery and Resilience Plan and the programme of the next financial perspective 	<p>outdoor activities in relation to nature's carrying capacity, predominance of short-term profit motives over long-term sustainability of the industry</p> <ol style="list-style-type: none"> 7. Lagging behind trends, lack of integration, lack of knowledge and ambition of providers 8. Administrative obstacles, short-term and unpredictable national development policy, ineffective inter-ministerial coordination and cooperation 9. Investment of public funds not aligned with the real needs and priorities of the tourism industry 10. Insufficiently qualified management of both providers and destination management boards
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2.1.2. The Mediterranean & Karst Slovenia Macro Destination

<p>KEY TAKEAWAY</p>	<p>Slovenia's Mediterranean & Karst macro destination is still relatively unconnected as regards two contiguous area (the Coast and the Karst), as well as in terms of exploiting their potential and channelling flows between the two regions. This macro destination still has great potential for the development of joint highly complementary tourism products (outdoors and culinary arts) and for joint cross-border cooperation. The developing destinations within the macro destination and the development of the Coast and the Port of Koper also have a great deal of sleeping potential.</p>
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STRENGTHS (S) = We preserve and grow	WEAKNESSES (W) = We overcome
<ol style="list-style-type: none"> 1. Protected and relatively well visible natural areas, the karst world, the Lipica Stud Farm, wine-growing areas with indigenous and fine wines/wine producers, increasingly developed town centres 2. Among the most developed municipalities in terms of tourism (Piran, Izola, Koper) 3. Favourable climate compared to other parts of Slovenia 4. Geostrategic coastal location for the development of nautical tourism and cruises 5. Proximity to Italy and Venice airports 6. Strong MICE (Meetings, Incentives, Conventions, Exhibitions) and spa-wellness products that are key to strengthening activity during non-summer months 7. Growing visibility of the "micro" destinations of the Karst, Vipava Valley and Brda Hills 8. Relatively good dispersion of the macro destination markets and segments 9. Increasing the tourism portfolio of products and services in the green countryside of Istria 10. Distinctive boutique-style accommodation, wine and culinary stories 	<ol style="list-style-type: none"> 1. The COVID-19 pandemic, which has hit particularly hard the MICE sector, casino tourism, cruises 2. Poor passenger transport connections of macro destinations with individual macro regions or with major urban centres, as well as a lack of local transport connections within macro destinations and in rural areas 3. Although the areas are logically rounded, they do not function as common arrival destinations — cooperation is still in the initial stages, a lack of trust and clear vision 4. Destination management is only just being established in a few leading destinations 5. Central sub-region (Slovenian Istria) is less competitive compared to Croatian Istria – weak and insufficiently differentiated positioning 6. Lack of staff or lack of professional qualifications 7. The quality of accommodation facilities is improving also in the Karst, Vipava Valley and the Brda Hills, but a significant number of providers still offer poor quality accommodation 8. Unregulated ownership structure of major hotel providers in the destination 9. Lack of amenities in key tourist centres (the character), which does not support efforts for a higher price positioning 10. Absence of recognisable international hotel brands
OPPORTUNITIES (O) = We seize them	THREATS (T) = We reduce impact

<ol style="list-style-type: none"> 1. Global trends towards green and authentic tourism, particularly relevant for the inland areas of Slovenian Istria, the Karst, Vipava Valley and Brda Hills 2. Complementarity of the tourism portfolio of products and services offered by Slovenian Istria on the one hand and the outskirts of the Istrian peninsula, the Karst, Vipava Valley and Brda Hills on the other hand (mutual advantages) 3. Ensuring the development of a boutique tourism portfolio based on individuality and sustainability, especially in the destinations of macro regions where tourism is developing 4. Removal of the Schengen border with Croatia and establishment of closer cross-border cooperation in Slovenian Istria (e.g. regulation of public transport by sea, nautical tourism, cross-border outdoor activities) 5. Strengthening Koper as a home port and Portorož airport as a home airport to obtain "zero emission" air passengers (air mobility) 6. Establishing a destination community for the entire macro region and professional management of public events and business meetings in Slovenian Istria 7. Further development of authentic culinary items (based on local supply) or itineraries, and increased coherence of outdoor products in the macro destination 8. Unused railway connection between the Vipava Valley and the Karst 9. Final arrangement of the coastal zone extending from Koper to Izola 10. Introducing new forms of mobility (common public rental system for bicycles, cars, on-call transport services, etc.) to support tourism in Slovenian Istria 	<ol style="list-style-type: none"> 1. Ensuring adequate staffing, especially in areas with a developed tourism industry 2. Making the Karst, Vipava Valley and Brda Hills more visible as purely day-trip destinations 3. Municipalities and businesses are not interested in working together as a macro destination 4. Excessive growth in tourism and a loss of authenticity, in particular of the Karst, Vipava Valley and Brda Hills 5. Tourism development and marketing too focused on just a few tourism icons of the macro destination of Slovenian Istria 6. Insufficient investment in adequate public infrastructure to support tourism development and improve the quality of tourism services 7. Lack of resources for successful marketing of the entire macro-destination 8. Developing tourism based on less environmentally friendly transport 9. Introducing partial smart tourism systems (digital technologies) in the development and marketing of destination tourism 10. Pressure on land development
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2.1.3. Thermal Pannonian Slovenia Macro Destination

KEY TAKEAWAY	This macro destination covers the entire eastern part of Slovenia and is visible for its strong and traditional product of natural spas. However, unlike "Western Slovenia", it faces a pressing need to strengthen the destination's product development, management, positioning and market attractiveness.
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STRENGTHS (S) = We preserve and grow	WEAKNESSES (W) = We overcome
<ol style="list-style-type: none"> 1. A macro destination with a strong product profile and the clear motive for arrival (thermal spa and health resort product). Strong spa tourism service providers (contributing one fifth of overnight stays in Slovenia) as generators of development in local communities 2. A year-round product with the lowest seasonality rate in Slovenia 3. Visibility and image of Slovenia as a health and wellness destination 4. Unique thermal and mineral waters and other verified natural healing factors 5. Rich spa tradition and relaxation therapy service in line with modern trends (AquaFun, wellness — 	<ol style="list-style-type: none"> 1. Market attractiveness of the macro destination (or eastern part of Slovenia) is lagging behind other regions 2. Spa resorts still do not function as coherent, developed and actively managed destinations (one spa service provider is in fact a destination) 3. Lack of specialisation between spas (similar indications/programmes/products, target groups, too similar, not distinctive enough) 4. Market entry by a number of micro-providers that have benefited from the development of spa resorts, mostly adopt a low price positioning strategy, and do not engage in destination development

<p>particularly strong segment of saunas and active holidays)</p> <ol style="list-style-type: none"> 6. Knowledge of people, based on tradition and two decades of research, upskilling and scientific evidence of natural healing factors 7. The diversity of cultural landscapes, cultural heritage, historical attractions and natural beauties of Prekmurje, through Savinjska to Dolenjska provides the basis for differentiating thermal destinations and authentic local experiences 8. Numerous investments and outstanding new boutique stories as part of the culinary-wine product 9. Recognised for its two wine regions, rich wine culture and the tradition of producing high-quality food — a landscape famous for its wine and traditional cuisine 10. Preserved, peaceful, safe rural environment and local communities very supportive of tourism development 	<ol style="list-style-type: none"> 5. Lack of distinctive products with higher value added, lack of sales products providing the basis for the marketing to be more successful 6. The spa segment has no established international quality and sustainability standards in place 7. More than ten years after the last investment cycle, the infrastructure is in need of new investments both in renewing and expanding the tourism portfolio 8. Still insufficient connection with the local environment and poor urban planning of spa resorts 9. Lack of genuine cooperation between spa centres and the destination, low level of engagement 10. Significant differences within the macro destination in terms of organisation, management and support environment
<p>OPPORTUNITIES (O) = We seize them</p>	<p>THREATS (T)</p>
<ol style="list-style-type: none"> 1. Increased awareness of the importance of health and well-being 2. Introducing sustainable business models in the operation of spa resorts (and spa destinations) and developing the "local-vital" concept 3. Turning away from crowds and busy tourist destinations — towards smaller local communities that manage tourism well and provide a safe, authentic experience 4. Entry of international chains into the market of spa service providers 5. Closer and more engaged public-private partnerships in destination management 6. Public-private partnerships at the destination level to develop tourist destination portfolio of service and products and tourism infrastructure 7. Intensifying the inclusion of cultural content and settings as well as contemporary culinary and oenological portfolios in tourism products and spa programmes 8. Strengthening short supply chains for major tourism service providers 9. Opening up the European health insurance market 10. Targeting more demanding market segments with more differentiated products 	<ol style="list-style-type: none"> 1. The name of the macro destination "Thermal Pannonian Slovenia" limits the product of "health and well-being" to the eastern part of Slovenia — thus blurring one of this product's key competitive advantages — i.e. its location in diverse regions/macro destinations 2. Further decline in the competitiveness of the Slovenian natural spa product vis-à-vis competitors in Eastern and Central Europe 3. Business strategy based on prices rather than differentiation (further competition on the generic beach tourism or guesthouse market) 4. Fierce competition of spa service providers on a limited domestic market 5. Basically insufficient and, with the collapse of markets due to the pandemic, further limited internationalisation in the medium term (loss and long-term recovery of markets that have been built up over several years, plus additional security risks, and loss of important markets for some destinations); the restructuring of markets and market segments in the aftermath of the COVID-19 pandemic is even more difficult 6. Arbitrary cuts to the public health network, without dialogue and without listening to the expert circles 7. Long-term provision of staff, competencies and innovation 8. Ownership structure of large tourism service providers 9. Delay in urgently needed investment due to the depletion of companies' assets 10. Absence of regional development shifts in public transport, related products and public tourism infrastructure

2.1.4. Ljubljana & Central Slovenia Macro Destination

KEY TAKEAWAY	This macro destination is characterised by a distinct duality — with, on the one hand, the capital city of Ljubljana as the most developed and organised tourist destination at all levels, and on the other hand, small destinations that are only at the beginning of development in terms of a tourist destination. A coherent common product is missing, in terms of both marketing and mobility.
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STRENGTHS (S) = We preserve and grow	WEAKNESSES (W) = We overcome
<ol style="list-style-type: none"> 1. Ljubljana’s visibility and attractiveness as the centre of the macro destination and as the capital city with a strong presence in foreign markets 2. Slovenia’s transport hub with motorway and railway network, and airport — the macro destination as a starting point for discovering the whole of Slovenia 3. Development of Ljubljana as a tourist destination in terms of a product 4. A few emerging leading destinations (Kočevsko, Bela Krajina, Idrija, Škofja Loka, Kamnik) willing to invest in tourism 5. UNESCO heritage (the Kočevje forests, Škofja Loka, Plečnik, pile-dwellers) 6. Ethnological and ethnic diversity of the population 7. A mix of urban and rural tourism, easily accessible from the capital 8. Lower seasonality of visits to Ljubljana compared to other destinations 9. Strong commitment of most leading destinations to the development of sustainable tourism 10. A small number of municipalities that are geographically larger facilitate decision-making and cooperation in the area 	<ol style="list-style-type: none"> 1. Poor transport connections within the macro destination and poor accessibility to certain destinations by public passenger transport 2. Lack of high-quality accommodation facilities outside Ljubljana 3. Low purchasing power of the local population in the remote destination areas, making it difficult to develop service activities 4. Part of the macro destination does not recognise tourism as a promising economic industry — over-dependence on public funds 5. Poorly developed or low-quality tourism infrastructure largely outside the capital 6. Fragmentation of the product and services tourism portfolio (hereinafter: tourism portfolio) outside Ljubljana and lack of the portfolio horizontal integration 7. Poor air connections 8. Poor amenities of the surroundings, settlements and cultural landscape in the more remote areas of the macro destination 9. Diverse and vaguely formulated identity (the Alps, UNESCO cities, the most forested area, rural environment, etc.) 10. There is no touring product in place to meaningfully connect the area and follow the logic of strategic directions
OPPORTUNITIES (O) = We seize them	THREATS (T) = We reduce impact
<ol style="list-style-type: none"> 1. Improving sustainable mobility and transport accessibility for all parts of the destination through public passenger transport and by taking advantage of the good connections with the destination’s centre 2. Further raising Ljubljana’s profile as the leading and creative city destination for sustainable lifestyles 3. Untapped potential of folk culture for commercial purposes 4. Redirecting the flow of tourists to less busy parts of the destination, providing options for one-day trips from Ljubljana 5. Optimising organisation — connections between the Central Slovenia region (Ljubljana and 25 municipalities of the Central Slovenia region) and the Ljubljana & Central Slovenia macro destination 6. Taking advantage of transit position between Central Europe and the Adriatic Sea 7. Consolidating the region’s position as one where nature and authentic experiences are easily accessible from the capital 	<ol style="list-style-type: none"> 1. Lack of the population’s interest in investing in tourism and working in tourism 2. Centralising the tourism portfolio only to Ljubljana 3. MICE segment affected – strong shortfall in Ljubljana 4. Seasonality of tourism portfolio outside Ljubljana 5. Lack of commitment to tourism development by local communities outside Ljubljana, resulting in unstable funding of infrastructure investments and unstable funding of destination management boards 6. Further reducing the transport accessibility to parts of the region by public passenger transport 7. Non-removal of technical barriers and the militarisation of the border with Croatia 8. Environmental degradation due to the Karst’s vulnerability to excessive pollution from industry and intensive agriculture 9. Increasing development disparities within the area 10. Low quality spatial interventions

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| <ol style="list-style-type: none">8. Significant space for tourism progress in the destination's less developed and underdeveloped areas (Notranjska, Suha Krajina)9. Revitalising degraded city centres and increasing high-quality and sustainably-oriented accommodation capacities with dispersed hotels (promoting brown-field investments)10. Improving spatial planning acts and providing "green-field" investments, especially in municipalities with less developed tourism industry | |
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2.2 Umbrella SWOT analysis of Slovenia, upgraded with the TOWS situation analysis of tourism development in Slovenia

Synthesis SWOT analysis

of Slovenian tourism's development situation in terms of its capacity to recover from the pandemic and to ensure the long-term competitiveness of the industry

revealed some very important structural challenges (summarised as 12 key challenges):



1 Tourism falls short of the promise of a green and boutique Slovenia	2 Low value added	3 Human Resources (amount, competencies, requirements)
4 Management effectiveness (at the destination and business level) and poor data-based decision-making	5 Dependence of tourism on other activities (integration and synergies within the industry and between sectors)	6 Upset tourism-environment-population balance (concentration, intensity, carrying capacity)
7 High seasonality	8 Slovenia appeals to more demanding segments in a very limited way and engages in targeted marketing during non-summer months	9 The tourism portfolio and image lack authentic (cultural) elements (overall visual appearance)
10 Lagging behind in international competitiveness	11 Trends in the new normal	12 Business, health, safety and other global threats

The SWOT analysis takes into account Slovenia's current state of development in the global tourism market, the state of play in the tourism industry in the midst of the COVID-19 pandemic and the state of play of Slovenian destinations in terms of their capacity to recover from the pandemic and the long-term competitiveness of the industry.

We are focusing only on Slovenia's strongest assets, which we must nurture and on which we base further development.

We are drawing attention to the critical elements and risks, where we are most vulnerable and which pose serious and complex structural challenges to tourism policy in the new era (staff, structure of accommodation and culinary providers, seasonality, below average value added, etc.).

To this end, we have highlighted the realistic opportunities brought about by external mega trends, the innovation potential of SMEs in tourism and significant financial resources available for the recovery of the business tourism sector after the pandemic.

The long-term competitiveness of Slovenian tourism is increasingly dependent on the wider environment, community acceptance and support from other activities. In this respect, the future challenges stemming from the SWOT analysis are very complex and interdependent, and suggest different development scenarios.

Table 20: Synthesis SWOT analysis upgraded with the TOWS matrix

<p>From identifying internal strengths and weaknesses, external opportunities and threats to highlighting key challenges and feasible strategies to address them</p>	<p>STRENGTHS (S)</p> <ol style="list-style-type: none"> 1. Slovenia's visibility in international markets as a green tourist destination 2. Wide diversity in terms of experience and geography: nature, cities, rural landscapes 3. Strong I FEEL SLOVENIA brand and supporting communication platforms 4. Institutional and destination framework for marketing, development and management in place 5. Functioning mechanisms for the development of sustainable and boutique tourism 6. Individual highly specialised products (outdoor activities, spa and health resorts, etc.) 7. Green awareness of the industry 8. Diversification of markets and segments 9. Outstanding individual achievements: providers, destinations, practices 10. Adaptability and responsiveness for the post-COVID-19 recovery (is this opportunity rather than an advantage?) 	<p>WEAKNESSES (W)</p> <ol style="list-style-type: none"> 1. Lack of cross-sectoral management and development of tourism at national, macro destination and local levels 2. Lack of staff, competencies and management in the industry 3. Structure and quality of accommodation — a shortage of high-quality year-round accommodation, a surplus of seasonal accommodation 4. Economic weakness of the tourism industry after COVID-19 5. Loss of distant markets and specific segments (meetings industry, cities) due to COVID-19 6. Industry's low value added 7. High seasonality and peak demand at the most visible destinations 8. Lagging behind in the development of public shared tourism infrastructure and usage regimes (mountain centres with cableway infrastructure, public space, outdoor activity regimes) 9. Lack of high-quality and sustainable culinary options (scope and authenticity) – in the middle part of the pyramid 10. Over-dependence of Slovenian tourism on unsustainable forms of passenger and goods mobility
<p>OPPORTUNITIES (O)</p> <ol style="list-style-type: none"> 1. Global trends and values turning in our favour (sustainability, decarbonisation, boutique character, local community involvement) 2. Accelerated implementation of green solutions/practices (a <i>trendsetting</i> role) 3. Entrepreneurial development potential of SMEs in tourism 4. Development funds of the EU and Slovenia earmarked for the green and digital transition and the mobilisation of private capital 5. Authentic products and experiences related to nature, culture and identity 6. Adding value to other industries through local chains 7. Consolidation and privatisation of state owned assets 8. Digital technologies 9. Valuation of cultural heritage, cities and brownfield sites 10. Integration of less-visible tourism areas 	<p>MAX-MAX Strategy (S-O) Using strengths to seize opportunities</p> <ul style="list-style-type: none"> > Stepping up the consolidation and capitalisation of the "green orientation" of Slovenian tourism > A properly thought-out and targeted digitalisation and integration of systems to increase the efficiency of businesses and destinations and to support our guests > Building local value chains 	<p>MAX-MIN Strategy (W-O) Seizing opportunities to overcome weaknesses</p> <ul style="list-style-type: none"> > Compensating for the 2022/2023 markets and establishing a more sustainable market model in the longer term > Making a transition to higher-value market segments > Financial and entrepreneurial strengthening of the industry/focused investment of available public grants and reimbursable grants > Verification and strengthening of destination management at all horizontal and vertical levels
<p>THREATS (T)</p> <ol style="list-style-type: none"> 1. Long-term provision of staff, competencies and innovation 2. Gap between sustainable promise and supply 	<p>MAX-MIN Strategy (S-T) Using strengths to avoid threats</p>	<p>MIN-MIN Strategy (W-T) Minimising weaknesses to avoid threats</p>

<ul style="list-style-type: none"> 3. Overload — pressure on nature, heritage, cultural landscape and GHG emissions 4. Quality of life and satisfaction of the local population 5. Authenticity and personal experience of a guest 6. Rigid regulatory framework and business environment 7. Support/synergies of parallel national policies: education, transport, space, labour market, culture, nature, agriculture 8. Accelerated green and digital transformation of competing countries 9. Mismatch between quality of service and price (further eroded due to COVID-19) 10. Unpredictability of global impacts: pandemic, war in Ukraine — security situation in Europe, climate change, terrorism, migration, recession in key markets, understanding changed habits in the post-COVID-19 era 	<ul style="list-style-type: none"> > Ensuring a balance between tourism, quality of life, accommodation capacity and experience > Creating integration platforms or digital connectivity between the economy and destinations (including mobility services) 	<ul style="list-style-type: none"> > Systemic planning, recruitment, retention and development of tourism staff > Coordinated and cross-sectoral aligned targeting of tourism and other development policies and projects > Management of tourism flows > Decarbonisation of the tourism industry
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TOURISM DEVELOPMENT SCENARIOS WITH ANALYSIS OF LOST BENEFITS AND OPPORTUNITIES

2.3 Scenarios for the development of tourism in Slovenia with an analysis of lost benefits based on different assumptions for the future development of tourism

Based on the actual past development of the tourism industry and social categories, aggregate data and concrete performance indicators of the various key tourism activities in Slovenia in the 2015–2020 period, and taking into account the emergency situation caused by the effects of the COVID-19 pandemic and prospects for the development of tourism markets and Slovenia's tourism portfolio of products and services in the next strategic period, which are in line **with the situation analysis's key takeaways and orientations, and relying on sufficiently precise assumptions based on historical data, ratios and international comparisons, we have created a model using bottom-up calculations, within which we have developed THREE DIFFERENT SCENARIOS** of the assumptions and the resulting outcomes of tourism development in the 2022–2028 period, providing the basis for the strategic decisions in the remainder of this document.

Despite the accurate quantitative baselines from the past period and the relatively precise bottom-up model of their calculation based on the input assumptions, the assumptions and results underlying the three different scenarios in this chapter only represent indicative scenarios of the possible direction of tourism development in Slovenia, which are intended to support strategic decisions and to help understand the consequences of each strategic decision, or choice of a scenario in view of the results and its consequences for individual economic and social categories in the future period.

The concrete and precise values of assumptions or consequences and outcomes, albeit fairly accurate, are less important than the relationships (differences) between the outcomes of individual scenarios, since, in particular, the observation of relationships or differences between scenarios is crucial for making strategic decisions on the concept of the further development of tourism in the 2022–2028 strategic period, while the final outcome of the chosen scenario represents merely an indicative quantification of the strategic goals.

Figure 3: Illustration of the three development scenarios



Figure 3: Illustration of three development scenarios

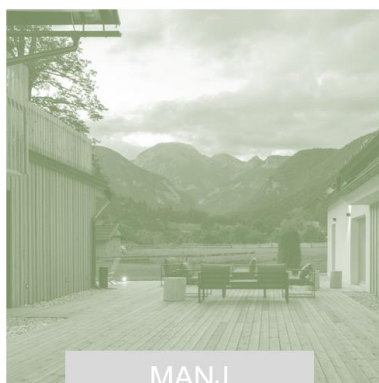
<p>MANJ JE VEČ</p> <p>"Butično"</p> <p>Zaostajanje v kvantitativni rasti ob popolnem osredotočenju na kakovost in dodano vrednost</p> <p>SCENARIJ 1</p>	<p>LESS IS MORE</p> <p>"Boutique"</p> <p>Lagging behind in quantitative growth with full focus on quality and value added</p> <p>SCENARIO 1</p>
<p>VEČ IN ŠE VEČ</p> <p>"Množično"</p> <p>Nadaljnje pospeševanje kvantitativne rasti ob stagnaciji ali zaostajanju kakovosti</p> <p>SCENARIJ 2</p>	<p>MORE AND STILL MORE</p> <p>"Mass"</p> <p>Further acceleration of quantitative growth in the face of stagnating or lagging quality</p> <p>SCENARIO 2</p>
<p>NEKAJ VEČ IN VELIKO BOLJE</p> <p>"Uravnoteženo"</p> <p>Zmerna kvantitativna rast ob pospešeni rasti kakovosti in dodane vrednosti</p> <p>SCENARIJ 3</p>	<p>A LITTLE BIT MORE AND A LOT BETTER</p> <p>"Balanced"</p> <p>Moderate quantitative growth with accelerated growth in quality and value added</p> <p>SCENARIO 3</p>

2.4 Key comparisons, recommendations, warnings, orientations and conclusions for the further development of tourism according to the outcomes of individual scenarios

The three presented scenarios provide the basis for deciding on the concept of tourism's further development in Slovenia and, based on different assumptions, provide answers to the consequences and outcome of the choice of each scenario. The main advantages or drawbacks of each scenario are as follows:

- > **Scenario 1 "Less is more"** is the most conservative and the most sustainable scenario, as it is the least ambitious in terms of the environmental burden associated with the growth of capacity and the number of guests and overnight stays. Nevertheless, it foresees the greatest focus on increasing the quality of services and raising the average prices achieved. Investments are moderate and focus primarily on the renovation of existing capacities. The number of staff required is also the lowest of the three scenarios; investment in quality rather than staff expansion is envisaged.
- > **Scenario 2 "More and still more"** requires an excessive increase in capacity, thus also increasing the environmental burden. This scenario also calls into question the need for a significant number of additional employees in the industry, which will be one of the major challenges in the coming period. The value added and final economic impacts are nevertheless lower or the same due to lower average consumption of tourists compared to the other two scenarios, which do not require such an increase in capacity, investment and in the number of overnight stays.
- > **Scenario 3 "A little bit more and a lot better"** envisages a moderate expansion of capacity, mainly of higher quality types of capacity, the majority of investments in renovation, an increase in the quality of existing capacity, slightly more intensive investments in food and beverage sectors, and additional offers. This scenario also foresees moderate growth in arrivals and overnight stays, while achieving a higher price level of services. It projects a moderate increase in demand for new jobs in tourism and more substantial investment in the quality of staff. It takes advantage of opportunities for further development of Slovenian tourism in a sustainable and economically efficient way, which allows the achievement of optimal economic and social indicators, while taking into account the sustainable aspects of tourism development.

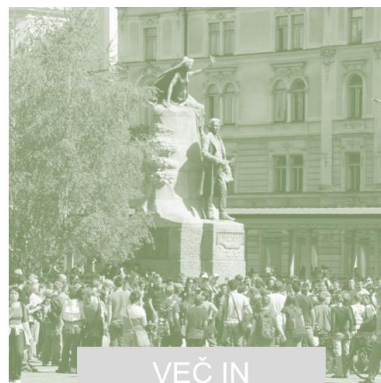
If Slovenia is committed to developing sustainable forms of tourism, reducing the burden on the environment while evaluating untapped potential, achieving profitability for entrepreneurs and investors, and improving the quality of experience and life for tourists, the local population and employees in the tourism industry, Scenario 3 is the most appropriate choice, with Scenario 1 as a fall-back scenario. Scenario 1 is the preferred choice for the most sensitive and vulnerable parts of nature, which are already endangered due to overcrowding.



MANJ
JE VEČ
„Butično“

Zaostajanje v kvantitativni rasti ob popolnem osredotočenju na kakovost in dodano vrednost

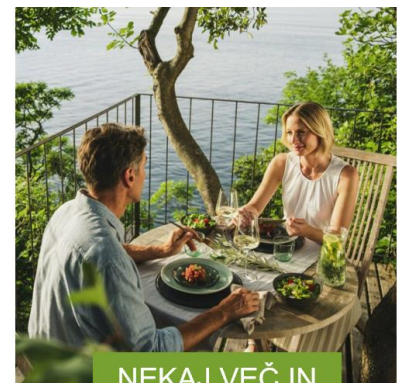
SCENARIJ 1



VEČ IN
ŠE VEČ
„Množično“

Nadaljnje pospeševanje kvantitativne rasti ob stagnaciji ali zaostajanju kakovosti

SCENARIJ 2



NEKAJ VEČ IN
VELIKO BOLJE
„Uravnoteženo“

Zmerna kvantitativna rast ob pospešeni rasti kakovosti in dodane vrednosti

SCENARIJ 3

2.5 Orientations and conclusions of the scenario comparison

All three scenarios compared show the real situation of each category in the three previous years, i.e. from 2019 to 2021 and in 2022 assume roughly the same outcome in terms of development, with differences

gradually beginning in 2023, and only to a perceptible extent in 2024 and from 2025 onwards. **Due to the effects of the COVID-19 crisis, it is not realistic to expect the immediate recovery of the entire tourism industry; the recovery will vary according to the segments and types of tourism portfolio, and it is realistic and sufficiently conservative to plan for a return to the aggregate figures in terms of number of overnight stays and arrivals of guests from the 2019 indicative level only in 2024 and 2025, respectively.**

The assumptions of each scenario also suggest a specific orientation of the tourism management and marketing policies and principles at national, local and business levels, which leads to achieving specific outcomes not only in terms of the volume of investments made. Of course, only fully realised assumptions, including investments, can lead to the full realisation of each scenario.

The scenarios presented at this stage are not intended for a precise budgeting of tourism development, but rather for selecting a targeted concept for the further development of tourism in Slovenia, which is based on the observation of differences in the direction and outcomes of the economic, social and environmental categories and key indicators between the individual scenarios. The values of individual key indicators for the level and quality of tourism development up to 2028, which are derived from each scenario, can therefore only be indicative and serve primarily to guide the further development of tourism.

Based on the choice of the scenario and the assumptions associated with the chosen scenario, the orientations for tourism development are set out and implemented in the strategic part of the document and in the strategies, policies and measures by individual area.

The table below again provides a comparative overview of the categories or selected key indicators to be achieved under each scenario by 2028 or at the end of the strategic period:

Table 28: A comparative overview of the achievement of the values of selected key indicators for Slovenia's tourism development after the end of the strategic period (2028+) under individual scenarios

Category/Development Indicator	Achieved in 2019	SCENARIO 1 (2028)	SCENARIO 2 (2028)	SCENARIO 3 (2028)
> Total revenue generated in the economy from tourism and hospitality consumption (I55 + I56 + R92.001 + additional effects of tourism consumption in related industries)	EUR 3.2 billion	EUR 4.1 billion	EUR 4.3 billion	EUR 4.8 billion
> Total revenue from the hospitality and gambling industries (I55 + I56 + R92.001)	EUR 2.3 billion	EUR 2.8 billion	EUR 3.0 billion	EUR 3.2 billion
> Total value added from the total hospitality and gambling industries (I55 + I56 + R92.001) in the year	EUR 0.92 billion	EUR 1.16 billion	EUR 1.19 billion	EUR 1.31 billion
> Value added per employee in the total hospitality and gambling industries (I55 + I56 + R92.001)	EUR 29,313	EUR 35,482	EUR 33,350	EUR 38,429
> Value added per employee in the accommodation sector as a whole I55	EUR 36,326	EUR 52,287	EUR 49,830	EUR 59,618
> Operating revenue per room/unit sold (RevPOR) in the sector as a whole I55	EUR 85	EUR 132	EUR 99	EUR 130
> Operating revenue per realised overnight stay in the sector as a whole I55	EUR 44	EUR 72	EUR 59	EUR 72
> Operating revenue per actual overnight stay in hotels and similar facilities	EUR 78	EUR 118	EUR 104	EUR 124
> Inflow from the export of travel	EUR 2.8 billion	EUR 3.3 billion	EUR 3.9 billion	EUR 4.0 billion
> Inflow from the export of travel per foreign tourist overnight stay	EUR 242	EUR 328	EUR 304	EUR 331
> Share of all tourism and tourism-related industries in Slovenia's GDP	6.5%	6.4%	6.8%	7.5%

Category/Development Indicator	Achieved in 2019	SCENARIO 1 (2028)	SCENARIO 2 (2028)	SCENARIO 3 (2028)
> Total number of jobs generated by tourism demand (<i>directly and indirectly in all related industries</i>)	44,730	49,540	54,349	53,266
> Total number of employees in the industry I55.100	8,791	9,098	9,705	9,531
> Total number of employees in the industry I55	9,218	9,973	10,829	10,378
> Total number of employees in the industry I 56	19,688	20,284	22,384	21,206
> Total number of overnight stays	15.8 million	14.4 million	18.4 million	17.1 million
> Number of all guest arrivals	6.2 million	4.7 million	6.7 million	5.6 million
> Average length of stay of all tourists	2.5 days	3.0 days	2.8 days	3.0 days
> Number of all types of beds available/100 inhabitants (average EU '19 = 7)	8.2	8.1	9.9	8.4
> Density of tourism industry in the country (total number of overnight stays/day/km ² , average EU'19 = 2.2)	2.1	1.94	2.49	2.31
> Intensity of tourism industry in the country (total number of overnight stays/100 inhabitants/day, average EU'19 = 2.7):	2.1	1.89	2.42	2.25
> Carbon footprint of the accommodation sector as a whole (I55) per overnight stay (in kg CO ₂ eq/overnight stay)	39.9 kgCO ₂ eq/overnight	30.0 kgCO ₂ eq/overnight	36.4 kgCO ₂ eq/overnight	30.3 kgCO ₂ eq/overnight
> Total carbon footprint (the amount of GHG emissions) generated from the total industry in a year (in kt CO ₂ eq.)	1.255 kt CO ₂ eq	1.058 kt CO ₂ eq	1.439 kt CO ₂ eq	1.241 kt CO ₂ eq
> Carbon footprint of the entire tourism industry per unit (EUR 1) of tourism GDP (in kg CO ₂ eq/EUR)	0.40 kgCO ₂ eq/EUR	0.26 kgCO ₂ eq/EUR	0.33 kgCO ₂ eq/EUR	0.26 kgCO ₂ eq/EUR
> Carbon footprint of total tourism activity per unit (EUR 1) of value added (in kg CO ₂ eq/EUR)	0.96 kgCO ₂ eq/EUR	0.59 kgCO ₂ eq/EUR	0.79 kgCO ₂ eq/EUR	0.59 kgCO ₂ eq/EUR
> Total cumulative value added generated from the total tourism consumption (all direct and indirect tourism sectors) over the 2022–2028 period		EUR 10.6 billion	EUR 10.59 billion	EUR 10.56 billion
> Total value added generated from the total tourism consumption (all direct and indirect tourism industries) in the country per overnight stay (foreign + domestic)	EUR 83	EUR 126	EUR 99	EUR 122
> Percentage of foreign tourist overnight stays	72%	70%	70%	70%
> Number of foreign tourist overnight stays	11,370,766	10,053,465	12,883,901	11,961,818
> Total additional number of tourist units/rooms (relative to 2020)	62,238	2,572	15,025	4,425
> Number of additional rooms (relative to 2020) in hotels and similar facilities	26,257	1,313	3,151	2,626
> Number of additional rooms (<u>relative to 2020</u>) in all other types of accommodation	35,981	1,259	11,874	1,799
> Total payments of taxes, contributions, concessions, fees, etc. to the state budget, the state treasury and the municipal budgets from tourism consumption per year	EUR 613.3 million	EUR 802.7 million	EUR 840.2 million	EUR 907.2 million
Share of taxes, contributions, concessions, fees, etc. from total tourism consumption in	5.7%	6.4%	6.7%	7.2%

Category/Development Indicator	Achieved in 2019	SCENARIO 1 (2028)	SCENARIO 2 (2028)	SCENARIO 3 (2028)
the value of the budget of the Republic of Slovenia				
> Total cumulative amount of payments of taxes, contributions, concessions, fees, etc. to the state budget, the state treasury and the municipal budgets from tourism consumption in the entire 2022-2028 period		EUR 4.9 billion	EUR 4.9 billion	EUR 5.0 billion
> Total cumulative investment needed for renovations and new construction in all tourism and tourism-related industries directly and indirectly in the entire period — total investment volume (2022–2028)		EUR 1.29 billion	EUR 2.02 billion	EUR 1.51 billion
> Total cumulative investment required for renovations and new constructions in the total accommodation sector I55 in the entire period (2022-2028)		EUR 0.77 billion	EUR 1.47 billion	EUR 0.94 billion
> <i>Total cumulative investment required for renovations and new constructions in the accommodation sector of hotels and other similar facilities I55.100 in the entire period (2022-2028)</i>		EUR 0.70 billion	EUR 1.13 billion	EUR 0.85 billion
> <i>Total cumulative investments required for renovations and new constructions in all other types of accommodation I55.2, 55.3 in the entire period (2022-2028)</i>		EUR 0.07 billion	EUR 0.34 billion	EUR 0.09 billion
> Total cumulative investment required for renovations and new constructions in the total food and beverage service sector I56 over the whole period (2022-2028)		EUR 0.39 billion	EUR 0.41 billion	EUR 0.41 billion
> Total cumulative investment required for renovations and new constructions in the gambling industry R92.001 in the entire period (2022–2028)		EUR 0.13 billion	EUR 0.14 billion	EUR 0.15 billion

Based on the analysis of the progress and outcomes of the scenarios compared, on the one hand, and the assessment of the state of play and the development level of tourism in Slovenia, in particular in terms of density and intensity of the tourism industry and value added generated in tourism, as defined in the evaluation of the previous strategic period, on the other hand, **Scenario 3** is the most optimal choice as the guideline for the further development of tourism in Slovenia.

The proposed Scenario 3 leads to a moderate and selective increase in the volume of capacities, which, taking into account sustainability principles, allows for the valuation of untapped potential in Slovenian tourism, while being strongly oriented towards higher quality, higher price positioning and an increase in the value added of the Slovenian tourism portfolio, which is a prerequisite for meeting the expectations of all key stakeholders in Slovenian tourism.

Such goals and orientations call for major changes in Slovenian tourism on the part of the public and private sectors, because, in addition to the sustainable environmental aspect and the Green Agenda, it will be necessary to ensure high quality for guests and, consequently, to achieve an appropriate price position and value added for entrepreneurs, employees, the State, as well as the satisfaction of the local population. In this scenario, the greatest weight of effort and change is primarily on the supply side of Slovenian tourism, which will also have to deliver on this promise, while on the demand and marketing side, the key shift is towards the targeting of more sophisticated guest segments with higher average consumption and lower negative impact on the environment. This scenario is also realistically feasible in terms of the required investment cycle, taking into account the funds envisaged to promote tourism development as part of the Recovery and Resilience Plan, the REACT-EU programme and through other EU instruments in the coming period, which comprise the largest package of incentives for the investment cycle and development of Slovenian tourism so far, and also in view of other favourable conditions on the financial and capital markets in the region and the relatively favourable outlook for Slovenia's economic growth in the period ahead.

Scenario 1 may serve as a fall-back option, which can be materialised if the conditions for triggering the investment cycle to expand the scope and increase the quality of capacities, as envisaged in Scenario 3,

cannot be ensured. Scenario 1, on the one hand, would raise the bar even higher in terms of quality, price position and value added, while on the other hand limiting the growth of capacity to an extreme degree, and is therefore the most conservative from this point of view. The task of redirecting Slovenian tourism towards a significantly higher quality of limited capacity would be even more challenging, but nevertheless feasible for a country like Slovenia. In this context, Scenario 1 can also be seen as the most suitable choice with respect to the most sensitive and vulnerable parts of nature, which are already threatened by overcrowding.

Scenario 2 is not recommended due to a number of potential negative impacts on the sustainable growth of Slovenian tourism, which were already identified in the evaluation of the previous strategic period and in this strategic document's analysis of the situation. However, without active policies and development orientation, it is also feasible, at least to a certain extent, to realise this scenario. The realisation of this scenario would result in continued satisfaction with the physical volume of overnight stays, capacities and also revenues, especially during the recovery period and after the low realisations in 2020–2021/2022, but in the long term Slovenian tourism would lose its competitiveness, value added, the quality of services and would soon begin to lag behind in terms of development.

3. VISION, MISSION AND GOALS OF SLOVENIAN TOURISM DEVELOPMENT

3.1. Vision and mission of Slovenian tourism

Foundations

In the new strategic period and the "new normality", the Slovenian tourism industry calls for an upgraded, transformative vision that will unite us in the urgently needed shift towards a more balanced and resilient tourism, friendly to nature and the local population, with a more pronounced character of Slovenian identity, a decisively higher value added and that will be in the interest of all stakeholders.

In tourism, we aim to generate somewhat more than in the previous period, but, above all, we want it to be of much higher quality and much better – for everyone.

A change of vantage point in formulating the new vision, which – importantly – builds on the vision and clear strategic direction of Slovenian tourism from the past period.

Past unsustainable growth and, on the other hand, climate and health threats have forced us to reflect.

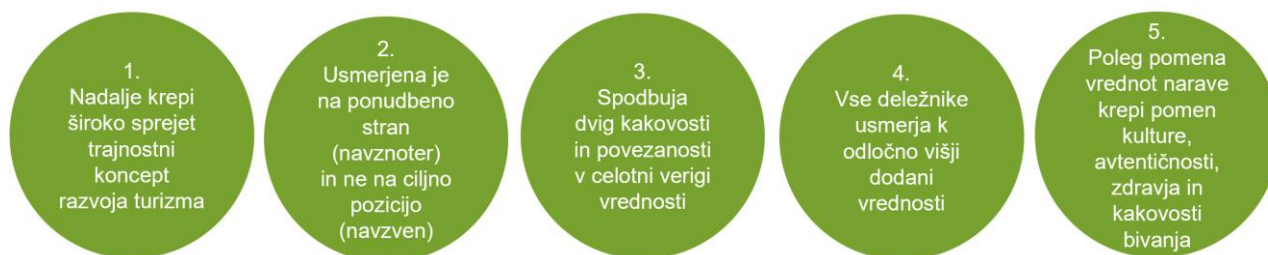
We have become aware of the need for change, but we are even more aware of the value of our own assets and even more appreciative of our local character, which we want to share responsibly with our guests. We need to work even more sustainably, carefully, thoroughly, deeply, coherently, with quality and innovatively.

Failing this, we will not achieve the needed increase in value added — and without value added, we will not be able to make the necessary investments in more sustainable and digital infrastructure and people.

Tourism has demonstrated its vulnerability more than ever, but also its huge impact on all activities and on the quality of life.

It is time to understand it as a common path and not an end in itself — that is, not in its narrow sense of an industry that benefits only its market hosts, but as a wider, overarching system that is interdependent with all other sub-systems and at the same time influences a wide range of other industries. It should be seen as a force for good, which, if managed in a balanced and responsible way, brings value to all.

The key features of the new vision are as follows:



1.	It further strengthens the widely accepted sustainable concept of tourism development.
2.	It focuses on the supply side (inwards) rather than the target position (outwards).
3.	It promotes an increase in quality and integration across the value chain.
4.	It guides all stakeholders towards a decisively higher value added.
5.	In addition to the importance of natural values, it strengthens the importance of culture, authenticity, health and quality of life.

We have removed the word "DESTINATION" from the vision for the new strategic period, as we see tourism not only as an industry, but as a broader ecosystem.

With the upgraded vision and the new strategy, we aim to highlight the importance of developing a diverse and high-quality Slovenian corporate portfolio of tourism products and services (boutique-style), as well as authenticity (Slovenia's genuineness and local character), which — together with a commitment to the principles of sustainability — should distinguish us from international competition and strengthen local communities, regions and Slovenia as a whole.

Vision of Slovenian tourism

GREEN BOUTIQUENESS. Smaller footprint. Greater value for all.

The sentence communicates the vision in the following way: ...the vision of Slovenian tourism is "Green boutiqueness. Smaller footprint. Greater value for all." In communication, we do not use the word DESTINATION (e.g. Slovenia's vision is a green boutique destination).

Še naprej gradimo „zeleno zgodbo“ Slovenije, pri čemer odločno krepimo zeleno vrednost – nadgrajujemo zeleno infrastrukturo in ponudbo ter v ponudbi in podobi krepimo avtentične (kulturne) elemente.

ZELENO =
OKOLJSKA +
DRUŽBENO-KULTURNNA +
EKONOMSKA TRAJNOST,
z močnim slovenskim zelenim lokalnim karakterjem

Pospešujemo butičnost – kakovostno ponudbo (ki jo odlikujejo principi lokalnega karakterja, kulturnih vsebin, trajnostnega razvoja, odgovornega doživljanja narave, premium storitev, 5-zvezdičnih doživetij, personalizirane izkušnje, vrhunske gastronomije, tehnoloških inovacij in digitalno podprtih procesov). Ustvarjamo ponudbo z višjo dodano vrednostjo, po meri zahtevnejšega in odgovornega obiskovalca.

BUTIČNO = PREMIUM
+ AVTENTIČNO (PRISTNO SLOVENSKO – izražen LOKALNI KULTURNI KARAKTER DESTINACIJ)

ZELENA BUTIČNOST.

Manjši odtis. Večja vrednost za vse.

POJASNILO VIZIJE

Naša zelena zaveza se izraža v manjšem (okoljskem in družbenem) odtisu. Uspešno ohranjamo biodiverzitet, kakovost okolja in naravnih vrednot ter z upoštevanjem nosilnih zmogljivosti ravnotežje med življenjem in obiskom.

Razvijamo turizem višje dodane vrednosti V INTERESU VSEH DELEŽNIKOV:

- 1 ZADOVOLJNA LOKALNA SKUPNOST (uravnotežen razvoj turizma, ki prinaša vrednost v lokalno ekonomijo, podpira vloške v urejeno okolje ohranjeno naravo in kulturno krajino, prinaša nove priložnosti za mlade, krepi lokalno identiteto ter omogoča ohranjanje kulturne dediščine).
- 2 USPEŠNA PODJETJA, ki skrbijo za MOTIVIRANE in ZADOVOLJNE ZAPOSLENE in vlagajo v razvoj ponudbe.
- 3 NAVDUŠENI OBISKOVALCI, ki dobijo bolj poglobljeno izkušnjo, ostanejo dlje in potrošijo več, cenijo tako naravo kot kulturne vsebine in avtentični karakter destinacij, radi priporočajo naprej in se vračajo.

EXPLANATION OF THE VISION

ENTHUSIASTIC VISITORS who get a more in-depth experience, stay longer and spend more, appreciate both natural and cultural content and the authentic character of destinations, like to recommend visiting and return.

Important note: The Green Scheme of Slovenian Tourism (GSST) provides the basis for defining, measuring and monitoring the delivery of the promise of "green" Slovenia, established as a national programme and certification scheme, which under the SLOVENIA GREEN umbrella brand brings together all efforts for the sustainable development of tourism in Slovenia, provides destinations and service providers with specific tools to assess and improve their sustainable operations, and promotes sustainable operations through the Slovenia Green brand.

Še naprej gradimo "zeleno zgodbo" Slovenije, pri čemer odločno krepimo zeleno vrednost – nadgrajujemo zeleno infrastrukturo in ponudbo ter v ponudbi in podobi krepimo avtentične (kulturne) elemente.	We continue to build Slovenia's "green story", with a strong focus on green value – upgrading green infrastructure and the tourism portfolio, and strengthening authentic (cultural) elements in our portfolio and image.
ZELENO = OKOLJSKO + DRUŽBENO-KULTURNA + EKONOMSKA TRAJNOST, z močnim slovenskim zelenim lokalnih karakterjem.	GREEN = ENVIRONMENTAL + SOCIAL-CULTURAL + ECONOMIC SUSTAINABILITY, with a strong Slovenian green local character
ZELENA BUTIČNOST. Manjši odtis. Večja vrednost za vse.	GREEN BOUTIQUENESS. Smaller footprint. Greater value for all.
Pospešujemo butičnost – kakovostno ponudbo (ki jo odlikujejo principi lokalnega karakterja, kulturnih vsebin, trajnostnega razvoja, odgovornega doživljanja narave, premium storitev, 5-zvezdičnih doživetij, personalizirane izkušnje, vrhunske gastronomije, tehnoloških inovacij in digitalno podprtih procesov).	We promote 'boutiqueness' – a high-quality tourism portfolio of products and services (characterised by the principles of local character, cultural content, sustainable development, responsible experience of nature, premium services, 5-star experiences, personalised experiences, world-class cuisine, technological innovation and digitally-enabled processes).
Ustvarjamo ponudbo z višjo dodano vrednostjo, po meri zahtevnejšega in odgovornega obiskovalca.	We create a tourism portfolio with higher value added, tailored to the needs of demanding and responsible visitors.
BUTIČNO = PREMIUM + AVTENTIČNO (PRISTNO SLOVENSKO – izražen LOKALNI KULTURNI KARAKTER DESTINACIJ)	BOUTIQUE = PREMIUM + AUTHENTIC (GENUINE SLOVENIAN – expressing LOCAL CULTURAL CHARACTER of DESTINATIONS)
ZELENA BUTIČNOST. Manjši odtis. Večja rednost za vse.	GREEN BOUTIQUENESS. Smaller footprint. Greater value for all.
Naša zelena zaveza se izraža v manjšem (okoljskem in družbenem) odtisu. Uspešno ohranjamo biodiverzitetu, kakovost okolja in naravnih vrednost ter z upoštevanjem nosilnih zmogljivosti ravnatežje med življenjem in obiskom.	Our green commitment translates into a smaller (environmental and social) footprint. We successfully preserve biodiversity, environmental quality and natural values, and the balance between life and visit, taking into account carrying capacities.
Razvijamo turizem višje dodane vrednosti V INTERESU VSEH DELEŽNIKOV:	We develop a higher value-added tourism IN THE INTEREST OF ALL STAKEHOLDERS:
1 ZADOVOLJNA LOKALNA SKUPNOST (uravnotežen razvoj turizma, ki prinaša vrednost v lokalno ekonomijo, podpira vložke v urejeno okolje, ohranjeno naravo in kulturno krajino, prinaša nove priložnosti za mlade, krepilokalno identiteto ter omogoča ohranjane kulturne dediščine).	A SATISFIED LOCAL COMMUNITY (balanced tourism development that brings value to local economies, supports investments in a well-maintained environment, preserves natural and cultural landscapes, creates new opportunities for young people, strengthens local identity and enables preserved cultural heritage).
6 USPEŠNA PODJETJA, ki skrbijo za MOTOVIRANE in ZADOVOLJNE ZAPOSLENE in vlagajo v razvoj ponudbe.	SUCCESSFUL BUSINESSES that seek to improve EMPLOYEE MOTIVATION AND SATISFACTION, and invest in the development of tourism portfolio.

Mission

We are developing a balanced green boutique-style tourism of higher quality, with a smaller footprint, and with a bolder cultural identity and local character, which is a generator of value, an accelerator of sustainable development, a well-maintained environment, well-being and a thriving culture, with positive effects for all.

We are good and proud hosts and diligent administrators and guardians of our environment, cultural identity and community. We aim for a satisfied population, motivated entrepreneurs and employees, and enthusiastic visitors. And we strive for the benefit of our future generations.

Targeted market positioning of Slovenian tourism

Green boutique destination for individual, responsible guests who value nature, health, cultural experiences and the authentic character of local communities.

Elements of market positioning:

- > GREEN — Slovenia develops its tourism industry in a balanced and responsible manner, in line with international standards for sustainability (respecting all three pillars of sustainability).
- > BOUTIQUE — We create a high quality tourism portfolio of products and services with higher value added, in line with standards for sustainability and tailored to the needs of an individual responsible visitor.
- > We target an INDIVIDUAL, RESPONSIBLE, more demanding guest who, in line with the new luxury trends, seeks and values authentic, unique and high-quality (5-star) experiences.
- > Slovenia is a destination where NATURE is always within reach. Nature that inspires and lures you into activities. Nature that teaches us the importance of responsible behaviour.
- > In Slovenia, people stop and take care of their HEALTH and well-being. Slovenia boasts centuries of tradition and unique thermal and mineral waters, and natural healing factors.
- > At the crossroads of the Alps, the Karst, the Mediterranean and the Pannonian Plain, Slovenia offers diverse and easily accessible CULTURAL EXPERIENCES with a strong local and AUTHENTIC CHARACTER.
- > Safe destination, small, balanced and welcoming local communities.

Explanation of the relationship between the vision and the target market positioning

<p>VISION</p> <p>What are we striving to achieve? Breakthroughs that need to be achieved.</p> <p>■ INWARD-ORIENTED</p>	<p>GREEN BOUTIQUENESS. Smaller footprint. Greater value for all.</p>	<p>The vision is intended for professional circles. However, through the nationwide internal communication campaign for a tidier, more welcoming and greener Slovenia (the last measure of the Strategy), we are also presenting it to the wider Slovenian public — all Slovenians.</p>
<p>TARGET MARKET POSITIONING</p> <p>What kind of destination do we aim to be recognised as — who do we want to invite to Slovenia?</p> <p>■ OUTWARD-ORIENTED</p>	<p>A green boutique destination for an individual responsible guest, who values nature, health, cultural experiences and the authentic character of local communities.</p>	<p>The concept of the target market position is transformed into a positioning slogan and a creative communication solution, under the "I feel Slovenia" brand.</p>

3.2. Strategic framework for tourism development

The following scheme defines the strategic framework for the development of Slovenian tourism:

- ▶ It summarises 12 key challenges of Slovenian tourism, identified and addressed through the Strategy;
- ▶ It identifies **5 strategic lines of action**:
 1. Quality, value and year-round supply of the tourism portfolio of products and services;
 2. Satisfaction of the population, employees and guests;
 3. Positioning tourism as a generator of value in other industries and sustainable development;
 4. Decarbonising and rebalancing Slovenian tourism;
 5. Competent and effective management structures;
- ▶ It defines **key performance indicators**;
- ▶ It elaborates in more detail the development goals (5 x 4 = **20 development goals**).

Figure 4: Presentation of the strategic development framework for Slovenian tourism



Figure 4: Presentation of the strategic development framework for Slovenian tourism

Tourism portfolio falls short of the promise of a green boutique Slovenia	STRATEGIC GOALS (SG) or strategic areas of action			
Low value added	Business and financial aspect BUSINESSES AND DESTINATIONS	Social aspect PEOPLE: residents, employees, guests	Economic aspect LOCAL COMMUNITY – REGION – SLOVENIA	Environmental and climatic aspect LOCAL AND GLOBAL ASPECT

Human resources (scope, competencies, conditions)	QUALITY, VALUE AND YEAR-ROUND SUPPLY OF PORTFOLIO PRODUCTS AND SERVICES	SATISFACTION OF INHABITANTS, EMPLOYEES AND GUESTS	POSITIONING TOURISM AS A GENERATOR OF VALUE in other industries and SUSTAINABLE DEVELOPMENT	DECARBONISING and REBALANCING SLOVENIAN TOURISM
Management efficiency	SG1 Conditions for a bold leap towards green 'boutiqueness' and value transformation of tourism portfolio supply to ensure the international competitiveness of the tourism industry on the high-value tourism market	SG2 Conditions for raising the profile of the industry , the tourism professions and the quality of service, pride, involvement and empowerment of local people , and for ensuring the authenticity of guests' experience	SG3 Understanding the impact of tourism's multi-dimensional function on the economy and increasing the number of inhabitants and businesses benefiting from tourism	SG4
Tourism's dependence on other activities – integration and synergies within the industry and between sectors				
Disrupted tourism-environment-population balance (concentration, intensity, carrying capacity)	Organisational aspect GOVERNANCE			
High seasonality	COMPETENT AND EFFECTIVE GOVERNANCE STRUCTURES SG5 A condition for successful integration of the tourism ecosystem at all levels and future direction of tourism development			
Slovenia's targeting of more demanding segments is very limited and during non-summer months				
Tourism portfolio and image lack authentic (cultural) elements				
Lagging behind in international competitiveness				
Trends in the "new normal"				
Climate, health, safety and other global threats				

The next page provides a more detailed explanation of the strategic development framework, with development goals (5 DG x 4 DO) and impact indicators for the target year 2028, under Scenario 3.

A detailed description of the indicators is provided in Table 35.

Table 29: More detailed explanation of the strategic development framework for Slovenian tourism

12 KEY CHALLENGES	Sustainability Aspect = Balance Aspect	5 STRATEGIC GOALS	INDICATORS (KPI) of impact for target year 2028 compared to base year 2019, under Scenario 3 (see Table 35 for detailed description of indicators)	4 x 5 DEVELOPMENT GOALS	TOURISM POLICIES	RELATED POLICIES
1. <i>Tourism portfolio falls short of the promise of a green boutique Slovenia</i>	Business and financial aspect BUSINESSES AND DESTINATIONS	SG1: QUALITY, VALUE AND YEAR-ROUND SUPPLY OF PORTFOLIO PRODUCTS AND SERVICES = The conditions for a bold leap towards green 'boutiqueness' and a value transformation in the tourism portfolio supply to ensure the international competitiveness of the tourism industry on the high-value tourism market	I1.1 Value added - Total value added in the tourism industry (SKD I Hospitality industry and R92.001 Activities of casinos): +43% - Value added per employee in the tourism industry (SKD I Accommodation and food service activities and R92.001 Activities of casinos): +31% - Value added per employee in accommodation (SKD I55): +64% - Average value added per employee in all tourism-related industries: +34% I1.2 Inflow from the export of travel - Inflow from the export of travel per foreign tourist overnight stay: +37% I1.3 Seasonality ratio - GINI seasonality index: — 15% I1.4 Length of stay of tourists Average length of stay: +20%*	DG 1.1: Balancing the quality, scale and structure of accommodation , food service and other tourism-related range of products and services (targeted investment support) DG 1.2: Strengthening high-value segments and a simultaneous shift in market positioning DG 1.3: De-seasonalisation by developing appropriate products, selecting the right market segments and ensuring the dispersion and timing of visits DG 1.4: Digital transformation of the tourism industry and smart destinations	Investments and business environment Public infrastructure and heritage for Slovenia's tourism character Products and marketing Digital transformation of Slovenian tourism Destination management and tourism integration	Taxation policy Finance Administrative environment and operating conditions Digital policy Foreign policy Institutional framework
2. <i>Low value added</i>						
3. <i>Human resources (amount, competencies, requirements)</i>						
4. <i>Effectiveness of management at destination and corporate level</i>						
5. <i>Tourism's dependence on other activities - integration and synergies within the industry and between sectors</i>	Social aspect PEOPLE: inhabitants, employees, guests	DG2: SATISFACTION OF THE POPULATION, EMPLOYEES AND GUESTS = Conditions for raising the profile of the tourism industry , tourism professions and the quality of service, pride, involvement and empowerment of local residents , and for ensuring the authenticity of guests' experience	I2.1 Satisfaction of the population - Average satisfaction of the population with the development of tourism in the destinations included in the GSST: +20% I2.2 Satisfaction of guests - The opinion of foreign tourists about the quality and satisfaction with individual elements of the tourism portfolio by type of tourist sites; average score of the overall impression of all sites: +1% I2.3 Satisfaction of employees - Average gross earnings in the tourism industry (SKD I Hospitality): + 35%	DG 2.1: Tourism as a desirable and reputable employer , attracting more young people DG 2.2: Raising the competencies and motivation of staff at all levels to provide higher value services DG 2.3: Responsible marketing (also to support seasonal and geographical distribution of tourism flows and responsible behaviour) DG 2.4: Ensuring the authenticity, sustainability and innovation of experiences , local cultural elements and the character of the tourism portfolio	Human resources and competencies Products and marketing Destination management and tourism integration Public infrastructure and heritage for Slovenia's tourism character	Education Labour market Cultural policy Environmental policy Institutional framework
6. <i>Disrupted tourism-environment-population balance (concentration,</i>						

12 KEY CHALLENGES	Sustainability Aspect = Balance Aspect	5 STRATEGIC GOALS	INDICATORS (KPI) of impact for target year 2028 compared to base year 2019, under Scenario 3 (see Table 35 for detailed description of indicators)	4 x 5 DEVELOPMENT GOALS	TOURISM POLICIES	RELATED POLICIES
<p><i>intensity, carrying capacity)</i></p> <p>7. <i>High seasonality</i></p> <p>8. <i>Slovenia's targeting of more demanding segments is very limited and during non-summer months</i></p>	<p>Economic aspect</p> <p>LOCAL COMMUNITY REGION SLOVENIA</p>	<p>SG3: POSITIONING TOURISM AS A GENERATOR OF VALUE in other industries and SUSTAINABLE DEVELOPMENT</p> <p>Understanding the impact of tourism's multi-dimensional function on the rest of the economy and increasing the number of population and businesses benefiting from tourism</p>	<p>I 3.1 Contribution of tourism and tourism-related industries to Slovenia's GDP: +15%</p> <p>I 3.2 Jobs</p> <ul style="list-style-type: none"> - Employees in the entire industry of tourism (SKD I) and gambling (SKD R92.001): +8% - Jobs generated by tourism demand: +19% 	<p>DG 3.1: Strengthening (green) local value chains and projects between tourism and other industries</p> <p>DG 3.2: Increasing potential to take up business opportunities in tourism — tourism as a platform for creating a market for the sale of a wide range of products and services</p> <p>DG 3.3: Creating a more business-friendly environment, reducing barriers and burdens for existing entrepreneurs and making it easier for new entrepreneurs to enter the market</p> <p>DG 3.4: Improving the amenities and visual appearance, tourism infrastructure and cultural landscapes in destinations</p>	<p>Sustainability and the Green Scheme of Slovenian Tourism</p> <p>Investments and business environment</p> <p>Products and marketing</p> <p>Public infrastructure and heritage for Slovenia's tourism character</p>	<p>Agriculture</p> <p>Business environment</p> <p>Finance</p> <p>Spatial policy</p> <p>Institutional framework</p> <p>Digital policy</p>
<p>9. <i>Tourism portfolio and image lack authentic (cultural) elements</i></p> <p>10. <i>Lagging behind in international competitiveness</i></p> <p>11. <i>Trends in the "new normal"</i></p> <p>12. <i>Climate, health, safety and other global threats</i></p>	<p>Environmental and climate aspect</p> <p>LOCAL AND GLOBAL ASPECT</p>	<p>SG4: DECARBONISING AND REBALANCING SLOVENIAN TOURISM</p> <p>= Stakeholders' responsibility and commitment to reduce our environmental and climate impacts, and become the most advanced industry in terms of the EU's sustainability commitments and Slovenia's transition towards carbon neutrality</p>	<p>I4.1 Carbon footprint</p> <ul style="list-style-type: none"> - Total carbon footprint (the amount of GHG emissions) generated from the total industry: -1% - Total carbon footprint generated from accommodation (I 55) per overnight stay: -24% <p>I4.2 Density of the tourism industry in Slovenia</p> <ul style="list-style-type: none"> - Number of beds/100 inhabitants: +2% - Number of overnight stays/day/km²: +10% - Number of overnight stays/day/100 inhabitants: +8% 	<p>DG 4.1: Regulating and better managing tourism flows and destinations</p> <p>DG 4.2: Strengthening sustainable mobility and integration in the tourism industry</p> <p>DG 4.3: Delivering on the (green) promise in practice at destinations and at the level of providers</p> <p>DG 4.4: Adapting supply, products and infrastructure to climate change</p>	<p>Destination management and tourism integration</p> <p>Sustainability and the Green Scheme of Slovenian Tourism</p> <p>Accessibility and sustainable mobility</p> <p>Public infrastructure and heritage for Slovenia's tourism character</p>	<p>Transport policy</p> <p>Environmental policy</p> <p>Climate policy</p> <p>Spatial policy</p> <p>Digital policy</p> <p>Institutional framework</p>

12 KEY CHALLENGES	Sustainability Aspect = Balance Aspect	5 STRATEGIC GOALS	INDICATORS (KPI) of impact for target year 2028 compared to base year 2019, under Scenario 3 (see Table 35 for detailed description of indicators)	4 x 5 DEVELOPMENT GOALS	TOURISM POLICIES	RELATED POLICIES
	<p>Organisational aspect (governance)</p> <p>DESTINATIONS, MD ACCRA REGION, COUNTRY–LINE MINISTRIES</p>	<p>SG5: COMPETENT AND EFFECTIVE MANAGEMENT STRUCTURES</p> <p>= Conditions for the integration of the tourism ecosystem at all levels and future direction of tourism development</p>	<p>I5.1 Quality performance of destination management boards</p> <ul style="list-style-type: none"> - Amount of the tourist tax collected (revenue of local communities): +22% - Budgets of all destination management boards (DMB): +50% <p>I5.2 Quality of tourism development management</p> <ul style="list-style-type: none"> - Factor of the value added generated from the tourism industry on the STB budget: +8% - Total payments to the state budget from tourism: +49% <p>I5.3 Quality of corporate governance</p> <ul style="list-style-type: none"> - Operating revenue per realised overnight stay in total industry I 55: +64% <p>Average occupancy of all types of accommodation (units/rooms) in the year: +11%</p>	<p>DG 5.1: Upgrading and structuring the model and content and raising the competencies of destination management boards</p> <p>DG 5.2: Establishing systemic and digitally supported local, regional, national and cross-sectoral cooperation at all levels</p> <p>DG 5.3: Empowering the Slovenian Tourist Board to play a stronger role in development management</p> <p>DG 5.4: Optimising financial resources (incentives, fees) for tourism development, including a management model for the consolidation, development and privatisation of state-owned assets in tourism and culture</p>	<p>Destination management and tourism integration</p> <p>Human resources and competencies</p> <p>Investments and business environment</p>	<p>Finance</p> <p>Institutional framework</p>

* Account has also been taken of touring across Slovenia, which is not captured with the existing statistical measurement methodology.

4. STRATEGY FOR ACHIEVING TOURISM DEVELOPMENT GOALS

4.1. Definition of the development concept

4.1.1. Orientation

In order to achieve the vision of "green boutiqueness, with a smaller footprint and greater value for all", Slovenian tourism has strategically shifted its focus to the development and marketing of a balanced portfolio of tourism products and services conducive to sustainable boutique tourism of higher quality, with an authentic character based on Slovenian nature and cultural identity – a generator of higher value.

The strategy aims at providing conditions for policies and measures to promote sustainable development, a well-maintained environment and a thriving culture, with positive effects on the growth of value added for all stakeholders, satisfied population, motivated employees, and enthusiastic visitors and for generations to come. The chosen development model focuses on a moderate and selective increase in the volume of capacities, which, taking into account sustainability principles, allows for the valuation of untapped potential in Slovenian tourism, while being strongly oriented towards higher quality, higher price positioning and an increase in the value added of the Slovenian tourism portfolio, which is a prerequisite for meeting the expectations of all key stakeholders in Slovenian tourism.

In the 2022–2028 period, Slovenia's tourism will therefore develop and operate with a strategy of **"A little bit more and a lot better" leading to a moderate growth in the volume of capacities and a significant improvement in the quality and value added of Slovenian tourism, taking into account aspects of sustainability, the valuation of cultural identity, effective digital transformations and all limiting factors.**

Such goals and orientations call for major changes in Slovenian tourism in both the public and private sectors, because, in addition to the sustainable environmental aspect, it will be necessary to ensure high quality for guests and, consequently, to achieve an appropriate price position and value added for entrepreneurs, employees, the State, and local communities, as well as the satisfaction of the local population.

In the scenario thus chosen, the **greatest weight of effort and change is primarily on the supply side of Slovenian tourism**, which will also have to deliver on this kind of promise.

However, as regards the demand and marketing, the key change is to actually, rather than just declaratively, target more sophisticated guest segments with higher average consumption and lower negative impact on the environment.

This scenario is also realistically feasible in terms of the investment cycle required, taking into account the resources earmarked to promote tourism development as part of the Recovery and Resilience Plan and other EU instruments in the coming period, which represent the largest package of incentives for the investment cycle and development of Slovenian tourism so far.

In addition to the already secured and planned sources of funding, and with a decisive focus on overcoming structural challenges and providing the conditions for the recovery and relaunch of the tourism industry in the new normal, additional resources will have to be provided from the budget of the Republic of Slovenia at the inter-ministerial level as part of a coordinated budget policy; moreover, additional EU resources will have to be sought, coordinated and approved. The success of such an investment and development cycle is also possible due to the favourable conditions on the financial and capital markets in the region, and the relatively positive outlook for Slovenia's economic growth in the coming period, based on its successful exit from the COVID-19 crisis and favourable economic indicators. In this regard, the negative impact of the war in Ukraine in 2022 on the escalating international security and economic situation should also be monitored and assessed. Given the integral nature of tourism, **cross-sectoral and inter-ministerial planning and funding of tourism**

development measures will be of paramount importance, bringing synergies and the **achievement of the strategic vision "greater value for all"**.

4.1.2. Development model to unlock the key potential of Slovenian tourism

The development model of Slovenian tourism for the 2022–2028 strategic period is based on the awareness and commitment that Slovenia, as a small country and economy, also in tourism opts for higher quality and an authentic and boutique character in its tourism portfolio, sustainable and green orientation, which is ensured through modern principles, knowledge, developed skills and advanced technologies, thereby achieving a higher value added that can satisfy all stakeholders in the tourism system.

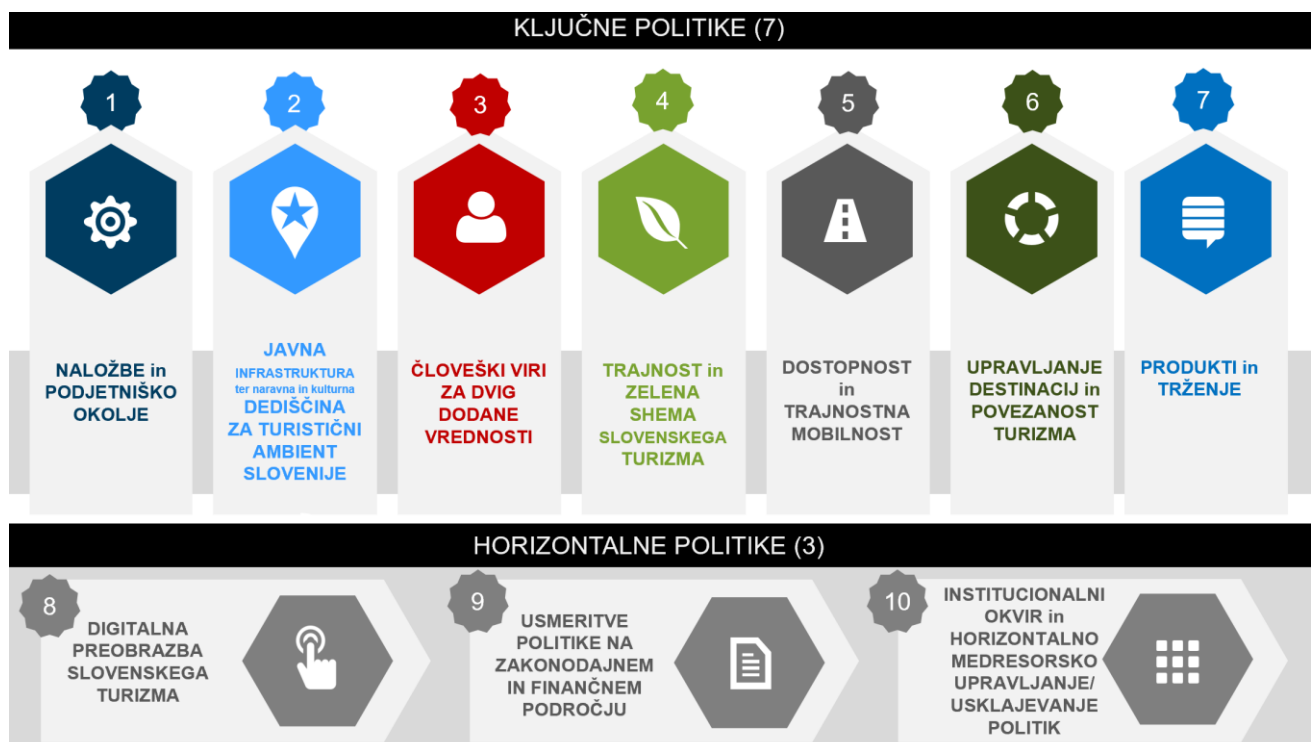
In order to achieve its vision, Slovenian tourism has set **5 strategic and 20 development goals to be pursued through 7 basic policies and 3 horizontal policies, as well as 23 sub-policies (orientations) and 93 measures within individual policies**. The basic policies are aimed at achieving the basic and support goals of the tourism development strategy in Slovenia. Horizontal policies support the implementation of all basic policies.

The main strategic policies aimed at achieving the goals in the Slovenian tourism industry:

- > Policy 1 INVESTMENTS AND BUSINESS ENVIRONMENT
- > Policy 2 PUBLIC/Common INFRASTRUCTURE and NATURAL AND CULTURAL HERITAGE TO IMPROVE SLOVENIA'S TOURISM CHARACTER
- > Policy 3 HUMAN RESOURCES TO INCREASE VALUE ADDED
- > Policy 4 SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM
- > Policy 5 ACCESSIBILITY AND SUSTAINABLE MOBILITY
- > Policy 6 DESTINATION MANAGEMENT AND INTEGRATION OF TOURISM
- > Policy 7 PRODUCTS AND MARKETING

Horizontal policies supporting the achievement of the main strategic policies and goals of Slovenian tourism:

- > DIGITAL TRANSFORMATION OF SLOVENIAN TOURISM
- > LEGISLATIVE AND FINANCIAL POLICY ORIENTATIONS
- > INSTITUTIONAL FRAMEWORK AND HORIZONTAL INTER-MINISTERIAL/CROSS-SECTORAL MANAGEMENT AND POLICY COORDINATION



KEY POLICIES (7)						
1	2	3	4	5	6	7
INVESTMENTS AND BUSINESS ENVIRONMENT	PUBLIC INFRASTRUCTURE and natural and cultural HERITAGE TO IMPROVE SLOVENIA'S TOURISM CHARACTER	HUMAN RESOURCES TO INCREASE VALUE ADDED	SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM	ACCESSIBILITY AND SUSTAINABLE MOBILITY	DESTINATION MANAGEMENT AND INTEGRATION OF TOURISM	PRODUCTS AND MARKETING
HORIZONTAL POLICIES (3)						
8		9		10		
DIGITAL TRANSFORMATION OF SLOVENIAN TOURISM		LEGISLATIVE AND FINANCIAL POLICY ORIENTATIONS		INSTITUTIONAL FRAMEWORK AND HORIZONTAL INTER-MINISTERIAL/CROSS-SECTORAL GOVERNANCE AND POLICY COORDINATION		

Development policies implement individual strategic (SG) and development (DG) goals of Slovenian tourism. In principle, each policy supports the pursuit of several goals. The development model showing the achievement of the development goals of Slovenian tourism with planned policies is shown in the table on the next page.

Table 30: Showing which strategic and development goals each policy contributes to

Policy	Policy 1	Policy 2	Policy 3	Policy 4	Policy 5	Policy 6	Policy 7	Horizontal policies		
Strategic goals (5x) and development goals (20x)/Policies	INVESTMENTS AND BUSINESS ENVIRONMENT	PUBLIC/COMMON INFRASTRUCTURE and natural and cultural HERITAGE TO ENHANCE SLOVENIA'S HUMAN RESOURCES TO INCREASE THE VALUE ADDED OF SLOVENIAN TOURISM	SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM	ACCESSIBILITY AND MOBILITY IN SLOVENIAN TOURISM	DESTINATION MANAGEMENT AND INTEGRATION OF TOURISM	PRODUCTS AND MARKETING	DIGITAL TRANSFORMATION OF SLOVENIAN TOURISM	LEGISLATIVE AND FINANCIAL POLICY ORIENTATIONS	INSTITUTIONAL FRAMEWORK AND HORIZONTAL INTER-MINISTERIAL MANAGEMENT AND POLICY COORDINATION	
1. QUALITY, VALUE AND YEAR-ROUND SUPPLY OF THE TOURISM PORTFOLIO OF PRODUCTS AND SERVICES (Strategic goal)										
1.1 Balancing the quality, scale and structure of accommodation, culinary options, and other tourism-related range of products and services (targeted investment support)	●			●					●	●
1.2 Strengthening higher value segments and simultaneous shift in market position	●						●			
1.3 De-seasonalisation by developing appropriate products, selecting the right market segments and ensuring the dispersion and timing of visits	●				●	●	●			
1.4 Digital transformation of the tourism industry and smart destinations	●				●	●	●	●	●	●
2. SATISFACTION OF THE POPULATION, EMPLOYEES AND GUESTS (Strategic goal)										
2.1 Tourism as a desirable and reputable employer, attracting more young people			●							●
2.2 Raising the competencies and motivation of staff at all levels to provide higher-value services	●		●			●				●
2.3 Responsible marketing (also to support seasonal and geographical distribution of tourism flows and responsible behaviour)		●				●	●			
2.4 Ensuring the authenticity, sustainability and innovation of experiences, local cultural elements and the character of the tourism portfolio	●	●		●			●			●

Policy	Policy 1	Policy 2	Policy 3	Policy 4	Policy 5	Policy 6	Policy 7	Horizontal policies		
Strategic goals (5x) and development goals (20x)/Policies	INVESTMENTS AND BUSINESS ENVIRONMENT	PUBLIC/Common INFRASTRUCTURE and natural and cultural HERITAGE TO IMPROVE SLOVENIA'S HUMAN RESOURCES TO INCREASE THE VALUE ADDED OF SLOVENIAN TOURISM	RESOURCES TO INCREASE THE VALUE ADDED OF SLOVENIAN TOURISM	SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM	ACCESSIBILITY AND SUSTAINABLE MOBILITY	DESTINATION MANAGEMENT AND INTEGRATION OF TOURISM	PRODUCTS AND MARKETING	DIGITAL TRANSFORMATION OF SLOVENIAN TOURISM	LEGISLATIVE AND FINANCIAL POLICY ORIENTATIONS	INSTITUTIONAL FRAMEWORK AND HORIZONTAL INTER-MINISTERIAL GOVERNANCE AND POLICY COORDINATION
3. POSITIONING TOURISM AS A GENERATOR OF VALUE AND SUSTAINABLE DEVELOPMENT (Strategic goal)										
3.1 Strengthening (green) local value chains and projects between tourism and other industries	●	●		●			●			●
3.2 Increasing potential to take up business opportunities in tourism — tourism as a platform for creating a market for the sale of a wide range of products and services	●						●			●
3.3 Creating a more business-friendly environment, reducing barriers and burdens for existing entrepreneurs and making it easier for new entrepreneurs to enter the market	●								●	●
3.4 Improving the amenities and visual appearance, tourism infrastructure and cultural landscapes in destinations	●	●							●	●
4. DECARBONISING AND REBALANCING SLOVENIAN TOURISM (Strategic goal)										
4.1 Regulating and better managing tourism flows and destinations	●	●			●	●		●		
4.2 Strengthening sustainable mobility and integration in the tourism industry					●			●		
4.3 Delivering on the (green) promise in practice at destinations and at the level of providers	●	●		●	●	●	●			
4.4 Adapting supply, products and infrastructure to climate change	●	●		●	●		●			●

Policy	Policy 1	Policy 2	Policy 3	Policy 4	Policy 5	Policy 6	Policy 7	Horizontal policies		
Strategic goals (5x) and development goals (20x)/Policies	INVESTMENTS AND BUSINESS ENVIRONMENT	PUBLIC/COMMON INFRASTRUCTURE and natural and cultural HERITAGE TO ENHANCE SLOVENIA'S HUMAN RESOURCES TO INCREASE THE VALUE ADDED OF SLOVENIAN TOURISM	SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM	ACCESSIBILITY AND MOBILITY IN SLOVENIAN TOURISM	DESTINATION MANAGEMENT AND INTEGRATION OF TOURISM	PRODUCTS AND MARKETING	DIGITAL TRANSFORMATION OF SLOVENIAN TOURISM	LEGISLATIVE AND FINANCIAL POLICY ORIENTATIONS	INSTITUTIONAL FRAMEWORK AND HORIZONTAL INTER-MINISTERIAL GOVERNANCE AND POLICY COORDINATION	
<i>(Achievement of individual Slovenian tourism development goals through planned policies)</i>										
5. COMPETENT AND EFFECTIVE MANAGEMENT STRUCTURES (Strategic goal)										
5.1 Upgrading and structuring the model and content, and raising the competencies of destination management boards			●			●			●	
5.2 Establishing systemic and digitally supported local, regional, national and cross-sectoral cooperation at all levels	●					●		●		●
5.3 Empowering the Slovenian Tourist Board to play a stronger role in development management						●		●		●
5.4 Optimising financial resources (incentives, fees) for tourism development, including a governance model for the process of consolidation, development and privatisation of state-owned assets in tourism and culture	●							●		●

4.1.3. A broader cross-sectoral and inter-ministerial approach for faster and more visible results

Tourism is not only a core economic sector, but also a cultural phenomenon and a broader need, which creates a market for the sale of a wide range of products and services, referred to as 'invisible exports', and many positive social and international impacts, mainly for destinations such as Slovenia, due to its geographic and transport location, small size and natural and cultural diversity. In terms of supply, the development of tourism should be properly managed and guided to ensure the longest possible value chain and positive value-enhancing effects for all stakeholders, and to reduce the negative effects of tourism development on Slovenia's environment and cultural image. This is successfully delivered in cooperation with all sectors and stakeholders involved in shaping Slovenia's tourism experience and in creating the conditions for its development and successful operation.

For the delivery of tourism development strategy, permanent cross-sectoral cooperation should be established to monitor and steer the implementation of the tourism development strategy at local, regional and national levels. At local and regional levels, this is ensured through the cooperation of stakeholders within destination and regional tourism organisations. At the national level, a permanent inter-ministerial coordination should be established along with the inter-ministerial group for actively monitoring and steering the implementation of the strategic goals, policies and measures set; the group is to be appointed and monitored by the Government.

The inter-ministerial monitoring and steering group, appointed to draw up the Slovenian Tourism Strategy 2022–2028, which includes representatives of private associations and interest groups alongside representatives of various ministries, should continue its work throughout the strategic period, ensuring coordination, steering and, where appropriate, adjustment of policies and measures to achieve Slovenia's tourism strategic and development goals.

Only a continuous and sustainable inter-ministerial approach to governing, steering, adjusting and financing the planned policies and measures will make it possible to successfully achieve strategic and development goals pursued in Slovenian tourism, as well as the synergies between all the sectors involved in achieving the goals of development ("Greater value for all").

The line ministries, offices and state agencies that are involved in the permanent inter-ministerial coordination and make up the aforementioned inter-ministerial monitoring and steering group operate in the following areas: economy, tourism (MGRT, STB), EU development policies and resources (GODECP), taxation policy and finance (MF, FURS, etc.), digitalisation policy (Government Office for Digital Transformation), education (MVIZŠ), labour market (MDDSZ), culture policy (MK), agricultural policy (MKGP), spatial policy (MOP), environmental policy and nature (MOP), climate policy (MOP), transport policy (MI), public administration (MJU), national statistics (SURS), and public legal records and related services (AJPES). The Chamber of Commerce and Industry of Slovenia, the Chamber of Craft and Small Business of Slovenia and other tourism-related interest groups should also be included in the permanent inter-ministerial coordination upon the invitation of the Ministry of Economic Development and Technology. The inter-ministerial group responsible for monitoring and steering the tourism development strategy is to be appointed and monitored by the Government on the proposal of the Ministry of Economic Development and Technology.

Policy coherence and linkage with the Recovery and Resilience Plan (RRP)

All the identified policies are highly cross-sectoral and inter-ministerial, and their orientations in terms of key goals and targeted reforms are brought into line with the individual areas and components of the Recovery and Resilience Plan, as well as the milestones or targets set in the Council of the EU Implementing Decision on the approval of the assessment of the Recovery and Resilience Plan for Slovenia (No. 10612/21 of 20 July 2021). At the same time, individual measures under specific policies are also aligned financially and in terms of time with the approved RRP in the area of smart, sustainable and inclusive growth, precisely with Component 4 "Sustainable development of Slovenian tourism,

including cultural heritage". All the measures envisaged will also be brought into line with the goals, principles and content of the reform orientations set out in the RRP, including at the final stage of implementation, with a particular focus on sustainable transformation and digitalisation in order to increase the value added of Slovenian tourism.

4.2. Definition of key policies

4.2.1. POLICY 1: Investments and business environment



Foundations of development policy

The investment and entrepreneurship development policy addresses the following challenges identified in the evaluation of the previous strategic period and in the situation analysis of the Slovenian tourism industry:

1. Slovenia's tourism industry and the integrated tourism portfolio are underperforming in terms of value added, both due to the relatively low price positioning in individual segments of tourism portfolio and due to the excessive growth in external costs in the industry.
2. The quality of services and experiences provided by the tourism portfolio is too low.
3. The tourism portfolio lags behind in the delivery on the communicated promise, both in terms of content and quality.
4. The seasonality of tourism flows is becoming more extreme and is already more stark than the EU average.
5. The volume and quality of human resources are not keeping pace with the development and market needs of the tourism industry, though they are a key resource for it.
6. In the most developed leading tourist destinations, the first conflicts are emerging between the scale of tourism development, environmental protection and the population's interests.
7. There is a noticeable lack of authentic cultural elements in the tourism portfolio and the image of tourist destinations.
8. Tourism providers and the performance and governance of tourism itself are confronted with the trends of "new normality" in the post COVID-19 period, which require deliberate action in the short term in order to achieve long-term goals. The COVID-19 health crisis is coupled with the security and political crisis caused by the war in Ukraine, and with other risks associated with these threats.
9. The business environment and the regulatory system are not conducive to micro, small and family business, which make up the essence of boutique-ness, diversity and also stability in tourism.
10. Slovenia's tourism industry is lagging behind in international competitiveness.

11. Tourist destinations and providers also face climate and other global threats to the future development of tourism. The commitment to sustainability at the European, national and industrial levels requires the adaptation and integration of sustainability in all segments of the business.
12. The effectiveness of the management of Slovenian tourism at the level of destinations is not optimal; the same applies to economic and ownership structures.
13. The possibility of using digital tools to optimise business performance in Slovenian tourism businesses is not sufficiently included in business, integration and decision-making processes.
14. Tourism is dependent on many other industries and the environment for the provision of holistic and high-quality experiences and outcomes, which are not sufficiently integrated in Slovenia's tourism system and do not keep pace with the requirements of growth and competitiveness of Slovenian tourism.

Policy strategy

Entrepreneurship and channelling private investments

The major challenge faced by private providers of tourism and tourism-related services and products is to increase the quality of services and user experiences, which would result in higher price positioning and higher value added, also by reducing the external operating costs. The key challenge, along with higher price positioning and higher value added, is also to increase the international competitiveness of Slovenian tourism providers, and to improve their operational efficiency and sustainability in the environment of tourist destinations.

The change in the tourism market and conditions imposed by COVID-19, coupled with the escalating security and political situation in Europe and the world, call for a two-step strategy. The priority is to take short-term measures to recover and relaunch the industry and to reach markets that are supportive and consistent with the long-term goals of creating higher value added products, where businesses and all providers can reap their competitive advantages. However, to achieve the long-term goals of Slovenian tourism set out in this Strategy, strategic action is required.

During the 2022–2028 strategic period, the policy to support private investments focuses on the following:

- a) Increasing total value added in the tourism industry (I55 Accommodation, I56 Food and Beverage Service and R92.001 Activities of Casinos) by 43% (from EUR 0.92 billion to EUR 1.31 billion);
- b) Increasing value added per employee in the core tourism industry by 31% (to EUR 38,429) at the end of the strategic period compared to that achieved in 2019 (EUR 29,313), which implies an average annual growth rate of 8.9% and 6.6% respectively from 2022 onwards;
- c) In the accommodation sector (I55), achieving a higher growth in value added per employee at the end of the strategic period by 64% (to EUR 59,618) compared to that achieved in 2019 (EUR 36,326), which implies an average annual growth rate of 9% in the 2022–2028 period.

The targets set are ambitious, but, together with strategic measures and activities, realistically achievable, aiming to increase **the price position or average operating income per overnight stay** by 63% in the total accommodation sector (I55) by the end of the strategic period (to EUR 72/overnight stay) compared to 2019 (EUR 44/overnight stay). This translates into an average annual growth rate of 6.1% over the 2022–2028 period, which can be achieved mainly **through an improved qualitative structure of capacities, a significant increase in the quality of all types of tourist accommodation facilities and a more focused targeting of more demanding segments of guests.**

The Strategy is based on achieving a 7.8% increase in capacity in hotels and similar facilities, while maintaining capacities in other types of accommodation compared to 2019. To achieve the targeted shift in the quality and volume of private sector supply, the entire core tourism industry (I55, I56 and R92.001) needs a boost in investments worth approximately EUR 1.5 billion throughout the 2022–2028 strategic

period, of which 57% should be channelled into hotels and similar accommodation, 6% into other types of accommodation, 27% into food and beverage service and 10% into gambling.

In the accommodation sector (I55 as a whole), the strategic assumption and goal is to channel 65% of investments into the renovation, qualitative improvement and upgrade of existing facilities, and 35% into new high quality construction. **Increased efficiency, digitalisation of operations and sustainable management methods, while achieving a moderate increase in the volume and in particular the quality of staff, and improving the business environment and quality of destination management, will also help to achieve the goals of increasing value added, productivity and international competitiveness in the private sector of Slovenian tourism.**

This policy also addresses key investments in energy rehabilitation and in increasing energy efficiency, with the aim of reducing operating costs in the long term and ensuring a sustainable approach to natural resources, in particular in spa-tourism infrastructure and all investments where the potential of geothermal energy is still untapped. Geothermal energy is one of the sleeping energy potentials that can significantly reduce the carbon footprint of Slovenian tourism and provide an additional source of sustainable energy also for the sustainable development of other industries in the environment (greenhouse food production, agriculture, thermal energy for local communities and clean industry). Furthermore, the current method of using geothermal springs, mainly for therapeutic purposes in Slovenian spa centres, by discharging the used water into surface watercourses rather than injecting it into the geological strata through which water emerges, is completely unsustainable and also poses a threat to geothermal springs that are a crucial component of Slovenian spa tourism. On the other hand, companies and entrepreneurs incur costs due to high concessions and energy inefficiency, which reduce the value added of the industry that generates or influences almost 30% of Slovenia's tourism turnover.

The development policy **to promote private investments** in tourism is focused on:

- a) Improving the structure of accommodation capacities in an effort to moderately increase the volume and quality of accommodation capacity of hotels and similar accommodation facilities (hotels, motels, bed and breakfasts, guesthouses) and year-round tourist farms; Promoting the improvement of the quality and sustainable operation of accommodation facilities of at least 3* quality and above, and the upgrading of existing simple accommodation facilities (room providers, apartments, campsites, etc.) to higher value added types of accommodation;
- b) Increasing the quality and attractiveness of supply and improving the price position of existing accommodation facilities;
- c) Maintaining the volume of other types of accommodation (private rooms, apartments, campsites, etc.) at their current level, while significantly increasing their quality and price positioning;
- d) Channelling 65% of the investment potential into renovations, upgrading and raising the quality of existing accommodation facilities, and 35% into new tourism facilities;
- e) Promoting family business and the growth of family businesses to leapfrog to higher quality, authenticity, long-term sustainability, stability and value added of the accommodation supply;
- f) Encouraging diversity in the tourism portfolio and increasing value chains by promoting entrepreneurial supply and tourism involvement in food production, agriculture, wine-making, sports, recreation and health, cultural creativity and crafts;
- g) Promoting sustainable, energy-efficient and environmentally friendly ways of investing in, operating and managing tourism and tourism-related industries;
- h) Promoting the efficient digitalisation of the tourism industry in all areas of operation and governance, with the aim of reducing costs, increasing the quality of user experience for guests, improving competitiveness and increasing the value added of businesses and entrepreneurs in tourism;
- i) Targeting enterprise/local/regional development and information networking policy to increase the value chain and shorten supply chains;

- j) Promoting forms of public-private partnership in the implementation and management of projects/products.

Business environment

With the policy aimed at promoting investments, Slovenia's tourism industry primarily responds to the challenges of low value added and to its falling behind on its promise to make Slovenia a boutique, authentic, green, cultural, active and healthy destination for diverse and high-quality experiences. **Increasing the value chain in Slovenian tourism requires an improvement in the tourism portfolio's structure, quality and diversity in all areas, rather than only in the accommodation sector.** It is necessary to re-evaluate the matrix of products and experiences, and to promote the development of those for which there is a market potential that allows for higher value added throughout the entire value chain and of those that are feasible in terms of organisation and delivery.

The degree of success in adapting to the new normality and to the escalating international security and political situation, as well as the benefitting from competitive advantages, will depend on the innovation, boldness and healthy competition of businesses, which will also enable both sustainable growth for existing businesses and the entry of new ones into the industry.

Culture and cultural identity in the broadest sense are a factor that can make a key contribution to improving the value chain and increasing value added in Slovenian tourism – bearing in mind that value added can be created and increased primarily on the basis of the developed culture of population, entrepreneurs, entire communities, the organisation of operations (management) – and to their attitudes towards creativity on the supply side and towards guests on the demand side. The cultural identity of Slovenian tourism providers, destinations and Slovenia as a whole is a key differentiator from competing providers and destinations. Consequently, the focus of entrepreneurial activity in the tourism industry is on creating and highlighting the authentic and cultural identity of individual providers, tourist destinations, local communities and Slovenia as a whole, which is reflected in the manner and content of providing accommodation facilities, food, sports and recreational and health services, cultural services, social events, public services, the destination's amenities, the attitude towards guests, the presentation of the tourism portfolio, etc.

With the chosen tourism development strategy for the next period, aiming at a moderate increase in capacity and, above all, at a significant increase in quality, attractiveness, diversity and value added, the policy of providing support to investments **in additional and complementary portfolio of tourism products and services** focuses primarily on the following priorities:

- a) Significantly increasing the quality and improving the content and authentic diversity of Slovenia's tourism portfolio;
- b) Promoting a tourism portfolio with higher value added and with the potential to generate higher value added;
- c) Encouraging investments in significant quality improvement and in targeted expansion of capacity, including in cuisine, sport, recreation, health and cultural content;
- d) Developing an additional and complementary tourism portfolio in terms of authenticity, while taking into account modern trends in Slovenia's food and wine across all macro destinations and traditional geographical regions of Slovenia; Promoting the improvement of the quality of restaurants and other types of food service establishments by creating an authentic and modern culinary and oenological experience;
- e) Increasing the sustainability and culinary identity of tourist destinations and regions of Slovenia through joint projects, business models and investments made by restaurant facilities, food and drink providers, farmers, winemakers and other food and beverage producers and processors; Promoting the integration and improvement of value chains and the shortening of supply chains in tourist destinations and regions;

- f) Increasing the diversity and quality of the additional and complementary tourism portfolio of private providers in tourist destinations in the sport, recreation and health sector; Promoting investments and entrepreneurial activity relating to the provision of active, green and healthy tourism portfolio of products and services;
- g) Increasing the variety of private providers' additional and complementary tourism portfolio in tourist destinations in terms of continuous year-round range of cultural activities, cultural sightseeing tours, guided tours, private museums, galleries, permanent exhibition centres, antique shops, etc., cultural events targeting mainly domestic and foreign tourists and day-trippers, with the aim of significantly increasing the authenticity, uniqueness, and cultural identity of tourist destinations and regions of Slovenia in all seasons;
- h) Further promoting domestic demand to mitigate all crisis developments;
- i) Promoting and continuing the reduction of administrative barriers, and improving the business environment for the development of family business and the growth of family businesses in tourism-related industries to leapfrog to a higher quality, authenticity, sustainability and value added of the tourism portfolio;
- j) Improving and moderately expanding the scope of the tourism portfolio for year-round business, namely activities outside the main summer season, which contributes significantly to reducing seasonality and the geographical and temporal concentration of tourism flows.

State-owned assets in tourism businesses

The Slovenian tourism industry is still characterised by a high share of state-owned assets in the ownership of hotel and other tourism businesses, which has been inherited as a result of the specific failure of tourist businesses' privatisation and financial restructuring in the past.

As a result, the State indirectly, through state-owned companies or financial institutions, controls an extremely high share in the ownership of at least 7 major tourism companies and thus also a significant share in all tourist accommodation facilities, key leading tourist destinations and, consequently, in the overall Slovenian tourism industry and its business and social impacts.

These companies, with a notable state ownership stake, control 28.5% of all hotel and similar accommodation facilities in Slovenia, generate 35% of all overnight stays in hotels and similar facilities, employ approximately 50% of all employees, and generate 50% of total income in Slovenia's total accommodation sector, with one of them being the largest provider of gambling services in Slovenia.

They therefore have a strategic and crucial influence on the structure, image, results and social effects of Slovenian tourism, which cannot be left to random and uncontrolled privatisation as was the case in the past, leading to the present situation in which ownership, management and these investments find themselves today. At the same time, effective and targeted management and the structuring of the privatisation process for these investments and their individual functions are among the key conditions and levers for achieving the strategic goals of increasing value added and ushering in a developmental breakthrough in Slovenian tourism.

In the previous strategic period, a comprehensive consolidation model and a plan for the management and privatisation of the state-owned assets in the tourism industry were set up as consolidated assets under the management of the Slovenian Sovereign Holding (SSH) as a key policy and measure in this area. The implementation of this model stalled during the investment consolidation process of the Slovenian Sovereign Holding mainly due to the impact of the COVID-19 crisis.

In the new strategic period, the plan and the conditions for the management, consolidation, development and privatisation of state-owned company assets in tourism must be adapted and updated in view of the current investment consolidation process, the challenges and opportunities of Slovenian tourism, and the new strategic definitions for the development of Slovenian tourism in this strategic document.

The concept/model and plan, as well as the conditions for the management and privatisation of state-owned assets in tourism, should be harmonised, evaluated and supplemented accordingly, in

accordance with the policies and measures of the Slovenian Tourism Strategy 2022-2028 and within the remit of individual institutions, state bodies and state-owned companies.

In view of the changed market conditions and orientations of Slovenian tourism, it is also necessary to re-evaluate the objectives and the perspective of the provision of gambling, i.e. the organisation of special games of chance in casinos and gaming saloons, which form an integral part of the Slovenian tourism portfolio, in particular in terms of their contribution to the creation of higher value-added tourism products and compatibility with the established vision of Slovenian tourism. Lastly, the concession fee from special games of chance, in accordance with Article 74 of the Gaming Act, constitutes one of the major dedicated sources of funding the development and promotion of Slovenian tourism in the integral budget of the Republic of Slovenia, as well as local communities within the integrated tourism areas.

Policy coherence and linkage with the Recovery and Resilience Plan (RRP)

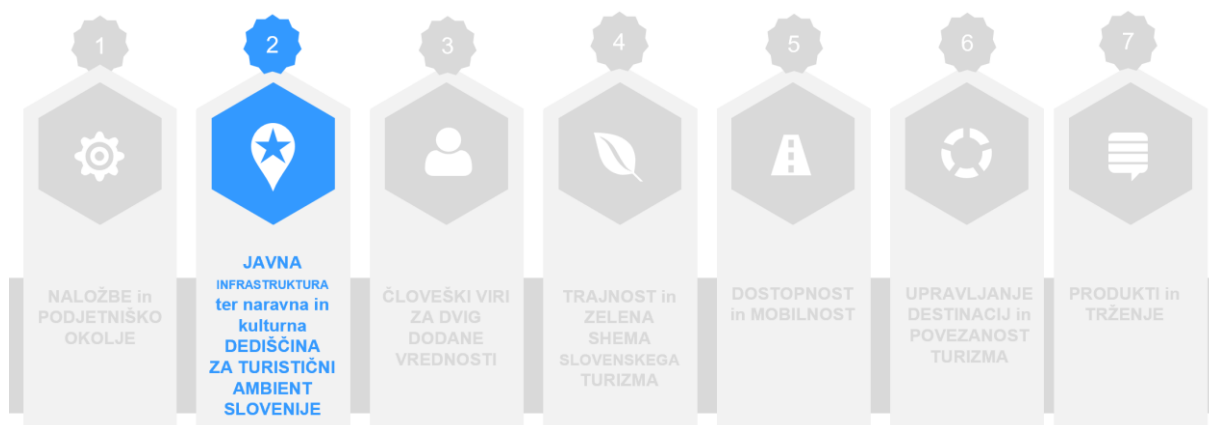
The policy for investment and the business environment is fully and with individual measures harmonised with the RRP, as well as with the milestones or targets set in the Council of the EU Implementing Decision on the approval of the assessment of the Recovery and Resilience Plan for Slovenia (No. 10612/21 of 20 July 2021). Measures 1.1.1 and 1.1.2 of this policy are fully derived from, and are also harmonised financially and in terms of time with the approved RRP regarding smart, sustainable and inclusive growth, precisely with Component 4 "Sustainable development of Slovenian tourism, including cultural heritage". Other measures under Policy 1 "Investment and business environment" are also aligned with the goals and envisaged reforms and investments under the above-mentioned Component 4 of the RRP. All the measures envisaged will also be brought into line with the goals, principles and content of the reform orientations set out in the RRP, including at the final stage of implementation, with a particular focus on sustainable transformation and digitalisation of Slovenian tourism.

Development Policy 1 includes measures in five areas or sub-policies:

Policy 1 INVESTMENTS AND BUSINESS ENVIRONMENT		
<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
SUB-POLICY 1.1		
Channelling and promoting private investments towards increasing the quality, sustainability, energy efficiency, competitiveness and value added in the tourism industry	MEASURE 1.1.1	Co-financing investments to increase the quality of SMEs' accommodation capacity and support higher value-added products
	MEASURE 1.1.2	Financing investments to increase the quality of tourism accommodation infrastructure through SID Bank's soft loan facility
	MEASURE 1.1.3	Establishing a system of financial incentives for the sustainable use of geothermal resources and the energy efficiency of tourism businesses and local communities
	MEASURE 1.1.4	Updating and adapting of the Hotelstars Union classification of accommodation facilities to the development goals of Slovenian tourism
	MEASURE 1.1.5	Establishing an integrated model for evaluating the state of play and dynamics of the tourism industry's development based on key performance indicators
SUB-POLICY 1.2		
Promoting and channelling private investments and entrepreneurship to develop diversified	MEASURE 1.2.1	Setting up a financial reward (incentive) instrument to raise the quality of Slovenia's culinary and oenological portfolio
	MEASURE 1.2.2	Launching the "Authentic Delicacies of Slovenia" programme to increase the value chain, shorten supply routes, raise the quality and visibility of authentic delicacies in Slovenian tourism

tourism-related products with higher value added and local cultural identity	MEASURE 1.2.3	Launching the "Slovenia, the Land of Sport, Recreation and Health" programme to increase the quality and international visibility of the services provided by entrepreneurs and Slovenia as a "top" tourist destination in the recreation, sport and health sector
	MEASURE 1.2.4	Launching the programme "Slovenia's boutique European cultural identity and creativity grows our tourism industry and excites our guests"
SUB-POLICY 1.3		
Target-oriented model for completing the consolidation, development and privatisation of remaining state-owned assets in the tourism sector and for further developing the gambling industry	MEASURE 1.3.1	Evaluating and updating the conditions, model and management plan of state-owned company assets in the tourism industry
	MEASURE 1.3.2	Establishing a model and legislative framework for developing the gambling industry in Slovenia (special games of chance in casinos and gaming saloons) in terms of gambling as a tourism entertainment product
SUB-POLICY 1.4		
Creating conditions for a competitive business environment by reducing barriers and burdens for existing entrepreneurs and making it easier for new entrepreneurs to enter the market	MEASURE 1.1.4	Recovery and relaunch of tourism activities after the COVID-19 crisis and the negative impact of the escalating security and political situation
	MEASURE 1.4.2	Administrative simplification and improvement of the business environment
	MEASURE 1.4.3	Setting up a platform for value chains, short supply routes and cross-industry collaboration
	MEASURE 1.4.5	Speeding up public-private partnerships in the implementation and management of tourism projects/products
	MEASURE 1.4.5	Setting up a platform and guiding companies in sustainable performance assessments as part of financial and investment decisions
SUB-POLICY 1.5		
Incentives to boost external competitiveness and productivity	MEASURE 1.5.1	Creating the conditions for effective international competitiveness of the tourism industry as a whole

4.2.2. POLICY 2: Public infrastructure and natural and cultural heritage to improve Slovenia's tourism character



Foundations of development policy

Well-maintained public and common infrastructure along with valued natural and cultural heritage constitutes one of the key elements of Slovenia's tourism character and is also a fundamental marker of a destination's cultural identity. Achieving high-quality user experiences for tourists and sustainable higher value added requires continuous investment in common and public infrastructure, the preservation and valuation of the natural and cultural heritage in tourism, ensuring its efficient governance and marketing and, through this, also adequate sources of funding, which is one of the major challenges for the achievement of the strategic goals of tourism by 2028.

Investment in public and tourism infrastructure is essential for increasing tourism's value added through the quality, diversity and attractiveness of the experience and the amenities of tourist destinations. Such amenities are currently lagging behind tourists' expectations, which takes us further away from the vision of boutique and authenticity linked to the cultural identity of destinations and Slovenia, and from greater value added for all.

The tourism portfolio and image of tourist destinations visibly lack authentic cultural elements, which, however, are not scarce in general in Slovenia and comprise a significant untapped potential. Furthermore, another of the challenges facing Slovenian tourism is the effectiveness of cultural heritage sites' governance, conservation and marketing. The valuation and management model of natural values and cultural heritage sites in tourism makes up one of the opportunities of the next strategic period to increase the diversity of tourism portfolio, improve the user experience and quality, authenticity, and also to strengthen the value chain and increase value added in Slovenian tourism. The sustainability of investments in cultural heritage sites and historic town centres is an additional key reason and driver for the active valuation of these sites in tourism in the next strategic period, as the carbon footprint of investments in the renovation of the existing building stock is much lower than the construction of new buildings. Culture and cultural identity, valued in the image and integrated Slovenian tourism portfolio of products and services, are a factor that can make a substantial contribution to improving the value chain and significantly increasing value added and sustainability of Slovenian tourism.

Policy coherence and linkage with the Recovery and Resilience Plan (RRP)

The policy on public infrastructure and natural and cultural heritage for Slovenia's tourism character is fully and with individual measures harmonised with the RRP, as well as with the milestones or targets set in the Council of the EU Implementing Decision on the approval of the assessment of the Recovery and Resilience Plan for Slovenia (No. 10612/21 of 20 July 2021). Measures 2.1.1, 2.1.2 and 2.2.3 of this policy are fully derived from, and are also harmonised financially and in terms of time with the

approved RRP regarding smart, sustainable and inclusive growth, precisely with Component 4 "Sustainable development of Slovenian tourism, including cultural heritage". Other measures under Policy 2 "Public infrastructure and natural and cultural heritage to improve Slovenia's tourism character" are also aligned with the goals and envisaged reforms and investments under the above-mentioned Component 4 of the RRP. All the measures envisaged will also be brought into line with the goals, principles and content of the reform orientations set out in the RRP, including at the final stage of implementation, with a particular focus on sustainable transformation and the valuation of natural and cultural heritage in tourism.

Policy strategy

This development policy includes measures in two areas or sub-policies:

<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
SUB-POLICY 2.1		
Investments in public and common tourism infrastructure	MEASURE 2.1.1	Co-financing investments in public and common tourism infrastructure in tourist destinations
	MEASURE 2.1.2	Financing and co-financing investments in the quality and sustainable transformation of mountain centres, cableway systems and ski resorts in Slovenia
	MEASURE 2.1.3	Programme to promote the active management and development of leading tourist destinations in terms of public tourism infrastructure (including cableway infrastructure), the digitalisation of business and the transition to a circular economy
SUB-POLICY 2.2		
Valuation, management and development of public-owned assets	MEASURE 2.2.1	Analysing, planning and creating a chain of authentic experiences "Castles and Mansions of Slovenia"
	MEASURE 2.2.2	Developing and setting up a model of real estate funds for the regulation, management and development of historic urban centres in Slovenia
	MEASURE 2.2.3	Sustainable restoration and revitalisation of cultural heritage and public cultural infrastructure – integration of cultural experiences in Slovenian tourism
	MEASURE 2.2.4	Providing support for the management and marketing of museums, galleries and other cultural institutions
	MEASURE 2.2.5	Developing and implementing a plan for the conservation and revitalisation of the characteristic features of Slovenia's cultural landscapes and their integration in tourism products
	MEASURE 2.2.6	Developing a plan for inter-ministerial harmonisation of legislation and administrative procedures for more effective integration of cultural content into tourism products
	MEASURE 2.2.7	Developing a national plan of conditions and criteria for the management and marketing of natural, cultural and technical heritage with a view to integrating it in the tourism portfolio (including UNESCO-protected heritage)

4.2.3. POLICY 3: Human resources for sustainable growth and for increasing the value of Slovenian tourism



Foundations of development policy

A major bottleneck in the further development of Slovenian tourism are human resources, as the skills and innovation of personnel are key to providing high-quality services and value added in all areas of the industry. Ensuring sufficient and adequate staffing levels poses thus the most pressing challenge and is a prerequisite for achieving the set strategic goals of Slovenian tourism by 2028.

1. In 2020, the core tourism industry (SKD Activity I Hospitality Sector) **employed 32,848 people**, accounting for 3.7% of the total number of people employed in Slovenia. However, taking into account indirectly related industries¹, this is a total of more than **65,000 jobs**.² While Slovenia recorded a 17% job growth in tourism between 2015 and 2019, i.e. in the pre-pandemic period, the number of people employed in 2020 decreased by 13.5%, or 5,119 jobs, compared to 2019, despite the Government's anti-coronavirus measures, and returned to the level of five years ago. As a result, the tourism industry accounted for half of the 10,310 job losses in the country between 2020 and 2019. Tourism and hospitality businesses posted 5,607 job vacancies in 2020 and **8,605 job vacancies** in 2021, which was an increase of 53% compared to the previous year. Unemployed people trained in the hospitality industry and related professions are reluctant to enter the industry due to the demanding working conditions and low wages. In 2020, the average gross wage in the hospitality industry (I) amounted to EUR 1,180 (net EUR 805 or EUR 5.32 per hour), **36% below the average gross wage in Slovenia**.
2. On the other hand, according to the Ministry of Education, Science and Sport, **2,746 pupils** (of whom only 5 apprentices) have enrolled in education programmes of culinary arts and tourism at 17 schools and **685 students** at 9 post-secondary institutions in the 2021/22 school year. Based on the analyses of enrolments in tourism and hospitality education programmes, we assume that **the current inflow of staff from the education system covers only between 10% and 20% of the actual labour market needs**. The employment deficit in the tourism industry is estimated to range between 5,000 and 8,000 people. According to research conducted by the Employment Service, the industry is expected to see a 4.9% growth in staff needs in 2022, while more than 70% of employers from the tourism and hospitality industry predict that recruitment problems will continue in the future.³

¹Operation of funiculars, ski and cable lifts, ski centres, marinas, casinos and amusement parks, tourist and travel agencies, transport and vehicle rental, guiding, organisation of meetings, cultural, artistic and sports and recreational activities, out-patient medical practice, beauty treatment and other similar services.

²The measures below refer to direct and indirect industries, unless otherwise specified in the individual measure.

³ https://www.ess.gov.si/trg_dela/napovedi-zaposlovanja

3. The industry is **also 'undernourished' in terms of the structure, knowledge and skills of existing employees**. It employs 11% of employees with primary education, 73% with secondary education and 16% with higher/university education. The share of employees with higher-level and university-level education is higher in the accommodation sector (27%). A total of 57.9% of employees in the industry are women and the average age of an employee is 41 years and rising (39 years in 2015).
4. Despite the industry's market potential, the lack of adequate human resources **prevents its normal operation**, let alone its quality development, in accordance with the goals of the new tourism policy. The supply of **operational staff to the tourism and hospitality industry** (chef de cuisine, sous chef, waiter, receptionist, room attendant, server, etc.) is an extremely serious issue, especially due to the high seasonality and peak workload.
5. Tourism is further characterised by **a high staff turnover and the risk of further losing educated and qualified employees to other sectors** with more stable conditions (social security) and more regulated working conditions (working time, workload, precarious work). The COVID-19 pandemic has accelerated and intensified the staff exodus to other industries. **Tourism professions and work are devalued and do not have broad social prestige**, with the exception of professions in culinary arts. Adverse demographic trends also have an increasing impact on the human resources deficit.
6. Employers are partly addressing the shortage of staff on the domestic market **through the precarious work of secondary school or university students and the employment of foreigners**, without systematically investing in their knowledge and skills so they could be able to perform professions in the tourism and hospitality industry.

The structure and (dis)satisfaction of employees and, on the other hand, demographic trends, changes in the industry and the digitalisation of society require a well-thought, systemic and determined approach to motivation, integration, training, reward, flexibility and organisation to ensure higher employee satisfaction and thus higher productivity (added value) and, hence, high quality services for guests.

Policy strategy

The human resources development policy is focused on ensuring the sufficient number, knowledge and value of human resources in the tourism industry to enable and support the green, digital, quality and value breakthrough of Slovenian tourism. The planning and management of human resources in tourism must be raised to a higher level, both in businesses and in the institutional educational and support environment. Existing measures, which are scattered across various sectors, need to be integrated and focused towards a common goal. The ministry responsible for tourism should take the lead and play a coordinating role. A **long-term and targeted process of changing the valuation of tourism professions** (wages, working conditions, public image) should be launched **and the systemic framework for planning the inflow and development of tourism staff needs to be improved, with a joint commitment from stakeholders** on the part of the Government, employers, education system, labour market and trade unions.

In the face of a critical situation, the approach to the human resources development policy is simultaneously focused on:

- > short-term actions and projects to normalise the business in the first period of the strategy's validity;
- > and long-term human resources development measures to increase the value of Slovenian tourism.

In order for the policy to be effective, it is essential to establish permanent national coordination for human resources in the tourism industry, which will bring together all key stakeholders, existing and new programmes, and, through an integrated campaign, promote measures to re-evaluate the status of the tourism and hospitality professions, more flexible legislative solutions, the modernisation of the

education system and incentives for the human resources and business transformation of tourism businesses.

This development policy includes measures in three areas or sub-policies:

Policy 3 HUMAN RESOURCES		
<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
SUB-POLICY 3.1		
Ensuring the inflow of staff	MEASURE 3.1.1	Multi-annual integrated programme CAREER IN TOURISM with a national campaign
	MEASURE 3.1.2	Activation and prequalification of staff on the labour market (Quick fix)
	MEASURE 3.1.3	Identification of deficit professions and introduction of financial incentives
	MEASURE 3.1.4	Scholarship policy for hospitality and tourism professions at home and abroad
	MEASURE 3.1.5	Recruitment and integration of foreign labour
SUB-POLICY 3.2		
Improving staff competencies for high-value green tourism industry	MEASURE 3.2.1	Quality, attractiveness, modernity and applicability of tourism and hospitality education programmes
	MEASURE 3.2.2	Teacher training in line with trends and exchanges of mentors between the tourism industry and schools
	MEASURE 3.2.3	Incentives for businesses to develop their human resources, modern competencies and a balanced working environment (voucher for the human resources and organisational transformation of tourism businesses)
	MEASURE 3.2.4	Open skills platform for green, digital and social skills in Slovenian tourism
	MEASURE 3.2.5	Strengthening the competencies of tourist guides
SUB-POLICY 3.3		
A flexible and favourable regulatory and supportive environment	MEASURE 3.3.1	National coordination for human resources in tourism at the Ministry of Economic Development and Technology
	MEASURE 3.3.2	Innovation and research environment for tourism
	MEASURE 3.3.3	Development and testing of new instruments to support human resources development in tourism
	MEASURE 3.3.4	Adapting legislation governing the provision of human resources, the labour market, competencies, flexible employment and (de)regulation of professions in tourism

4.2.4. POLICY 4: Sustainability and the Green Scheme of Slovenian Tourism



Foundations of development policy

The Green Scheme for Slovenian Tourism (GSST) is a national programme to promote the implementation of sustainable models in Slovenian tourism, managed by the Slovenian Tourist Board (STB) in partnership with The GoodPlace Sustainable Tourism Factory (GP). The GSST encourages stakeholders in tourism to embrace sustainable practices, adopt a sustainable attitude, and to publicly demonstrate their sustainability through the certification scheme operating under the SLOVENIA GREEN brand. Since its launch in 2015 with six certified providers, over 150 providers and 56 tourist destinations (75 municipalities) have joined the programme. Over time, the range of categories in the GSST has expanded to include destinations, protected areas (parks), accommodations, travel agencies and tour operators, hospitality providers, attractions and beaches.

In the selected tourism development scenario, we aim to achieve the green transformation by reducing the Slovenian tourist industry's total carbon footprint by at least 1% per year by 2028 compared to 2019, and, simultaneously, moderately increase the quantitative volume and significantly increase the value added generated in tourism. Furthermore, we have set ourselves an ambitious goal of reducing the carbon footprint of the total accommodation tourism industry, measured in terms of overnight stays, by 24% by the end of the strategic period compared to 2019. Also, we strive to ensure a more effective environmental economy in tourism by reducing the total carbon footprint of the entire tourism industry, measured per EUR 1 of GDP generated from tourism, by 34% compared to the 2019 base year, and the carbon footprint of all tourism, measured per EUR 1 of value added generated in tourism, by 38% compared to 2019. The set goals require strong leadership for policy and measures in all areas of management and targeted tourism industry, and in particular as regards direct instruments such as the GSST. The GSST is a central mechanism in Slovenian tourism, ensuring through certification programmes that the use of natural assets and other protected areas in tourism takes into account the rights and obligations that concern all citizens (Constitution of the Republic of Slovenia).

The GSST has increased awareness of the importance of sustainability and given impetus to the development of sustainable tourism in Slovenia. In order for the GSST to further successfully guide the development of Slovenian tourism, it is important that it is regularly updated, adapted to the realities of tourism, aligned with trends, and upgraded with fresh sustainable content. It is also essential that the method of verification and certification is simplified through modern technologies, and that useful and simple solutions for sustainable development are provided to the widest possible spectrum of tourism stakeholders.

1. The GSST currently covers 7 categories (destinations, accommodations, travel agencies/tour operators, attractions, parks, beaches, hospitality providers) and connects 215 bearers of the

Slovenia Green label. Despite the increase in the number of categories over time and the addition of new labels, the GSST does not yet **cover the entire tourism sector and all providers**. For selected business entities, such as congress centres, ski resorts and transport operators, there is currently no appropriate label available in the GSST, which means that they are less involved in sustainable activities at the national level. The number of support tools and commitments (e.g. Less plastic, more sustainability; Green Office; Green Event) is also increasing in the GSST. The GSST must simplify and **revamp** the 2015 **concept** and increase the efficiency of the roll-out before it can be further expanded.

2. In terms of destinations, the GSST is not expected to significantly expand, so it is necessary to focus on the pool of already certified destinations and establish long-term quality development cooperation with them. The challenge is in **green coordinators' lack of skills and competencies** and their high rate of churn, which leads to a loss of knowledge and experience. The post of a green coordinator is usually not included in the job classification, it is project-based and not funded from a permanent source; all of the above poses an obstacle to faster progress towards sustainable development.
3. The GSST has proven to be an effective platform for identifying key challenges for sustainable tourism in Slovenia, as it offers an aggregation of the results of 56 destinations. However, the insight into the aggregation at the level of both qualitative and quantitative data on the current digital platform is poorly supported in terms of technology, and therefore the **digitalisation of the GSST**, as foreseen by the RRP, is urgently needed. In particular, a very clear and simple model and system for monitoring environmental and sustainability indicators and certification should be put in place, with easy-to-use, including digital, assistance, supported at the national level.
4. In 2020, the document "**Roadmap Slovenia Green**" was developed in cooperation between the Slovenian Tourist Board and the Slovenia Green Consortium (SGC), which identified three key areas for the further sustainable development of Slovenian tourism: i) single-use plastics and food waste, ii) local supply and short supply chains; iii) cooperation with local communities. Every challenge has also been underpinned by targets and measures. The "Roadmap" has so far not been comprehensively and sufficiently implemented, in part due to its complexity, the required level of inter-ministerial coordination and cooperation and the financial resources needed.
5. The challenges facing many destinations should be better supported through the **development of tools and solutions, as well as by inter-ministerial cooperation and funding at the national level**. The tools designed for tourism within the targeted research programmes (such as the TRP *Guidelines for management of tourist destinations based on models of carrying capacity and tourism flows* and the TRP *Analysis of the impact of climate change and tourism on the sustainable development of tourist destinations with the identification of necessary measures for the public and private sectors*) are currently not applicable, which results in losing the potential value added of the targeted research programmes for Slovenian tourism.
6. The assessment of sustainability in destinations has shown that destinations do not measure or know their visitors' **carbon footprint** and, consequently, do not introduce measures to reduce and offset it. In order to reduce the tourism carbon footprint in accordance with the vision and the selected scenario for the development of quantitative and value-based environmental indicators for tourism, we urgently need the appropriate tools and knowledge in this area. There is also a lack of knowledge on the impact of **climate change** on tourism.
7. Tourists are increasingly looking for **local social and environmental initiatives** they can support, which is also a requirement of sustainability standards for destinations and businesses. Yet experience shows that the scope of such initiatives is very limited in Slovenia.
8. The number of providers involved in the GSST is growing very rapidly, but the **share remains low**. The internationally recognised Green Label has 1.01% of all accommodation facilities, 1.37% of travel agencies and 1.19% of restaurants. The top 20 businesses by revenue in the hotel and similar accommodation sector own 106 facilities — only 4 (3.8%) are certified. With

such a low penetration, it is difficult for Slovenia to deliver on the promise of being a green and sustainable destination in the eyes of its guests.

9. Providers of accommodation, hospitality services and tourist attractions are eligible to apply for the Ministry of Economy, Development and Technology's call for proposals to promote the environmental and sustainability labels, which does not apply to other categories of label recipients, such as agencies and natural parks.
10. The application of an international standard in business requires resources in terms of finance, time and personnel. In order for tenderers to opt for this procedure, **the benefits of the certification must be very well communicated** to them, with a focus on improving business processes and financial savings. Currently, this information is in general not clearly presented and not easily accessible.
11. In Slovenia, the GSST is very well recognised by expert circles (B2B), while the general public (**B2C**) does not yet identify Slovenia as one of the leading countries in this field.

Policy strategy

The development policy promoting sustainability and the GSST focuses on increasing sustainable business at the level of destinations and providers, and on accelerating delivery on the promise of green Slovenia and the reduction of the carbon footprint in practice. This will in turn help to raise Slovenia's profile as one of the leading destinations in developing responsible, low-footprint, environmentally and socially friendly tourism, creating value for all.

The implementation of the GSST currently relies primarily on the Slovenian Tourist Board (STB) and its accredited partner, with the Slovenian Tourist Board being the agency whose primary task is to promote Slovenia. As the GSST primarily centres on the strengthening of the development component, the successful implementation of the policy will require sufficient human resources and financial support within the Slovenian Tourist Board and, in the context of the Slovenian Tourist Board's newly proposed development function, intensive networking with regional and destination management boards, ministries, agencies and other departments.

The policy therefore aims to ensure the proper management of the GSST and, through this, to identify key challenges, including the development and implementation of the necessary support tools. To this end, the strategic planning of tourism development is simultaneously carried out at local, regional and national levels, through the formulation of appropriate strategic development documents that take into account the guidelines of the overarching Slovenian tourism strategy as well as the current nature conservation guidelines for each area. The destination planning and management process is defined in Policy 6 "Destination management and integration of tourism".

Policy coherence and linkage with the Recovery and Resilience Plan (RRP)

The policy for sustainability and the GSST is fully and with individual measures harmonised with the RRP, as well as with the milestones or targets set in the Council of the EU Implementing Decision on the approval of the assessment of the Recovery and Resilience Plan for Slovenia (No. 10612/21 of 20 July 2021). Measure 4.1.2 of this policy is fully derived from, and is also aligned financially and in terms of time with, the approved RRP regarding smart, sustainable and inclusive growth, specifically with Component 4 "Sustainable development of Slovenian tourism, including cultural heritage". Other measures under Policy 4 "Sustainability and Green Scheme of Slovenian Tourism" are also aligned with the goals and envisaged reforms and investments under the above-mentioned Component 4 of the RRP. All the measures envisaged will also be brought into line with the goals, principles and content of the reform orientations set out in the RRP, including at the final stage of implementation, with a particular focus on sustainable transformation and digitalisation of Slovenian tourism.

This development policy includes measures in three areas or sub-policies:

Policy 4 SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM		
<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
SUB-POLICY 4.1		
The Green Scheme for Slovenian Tourism as a tool for the development of sustainable tourism	MEASURE 4.1.1	Revising the concept of the Green Scheme for Slovenian Tourism
	MEASURE 4.1.2	Digitalisation and simplification of entry and use of the Green Scheme for Slovenian Tourism
	MEASURE 4.1.3	Management and development of the Green Scheme for Slovenian Tourism
	MEASURE 4.1.4	Classification and funding of the posts of green coordinator in destinations and businesses
SUB-POLICY 4.2		
Increasing sustainable business performance to reduce carbon footprint	MEASURE 4.2.1	Upgrading and consistently implementing the "Roadmap Slovenia Green" (single-use plastics and food waste, local supply and short supply chains; cooperation with local communities and the satisfaction of the population)
	MEASURE 4.2.2	Establishing a national system to measure, reduce and offset the carbon footprint of tourism
	MEASURE 4.2.3	Establishing a national model for adapting tourism to climate change
	MEASURE 4.2.4	Creating a model for the development of application tools based on the results of research projects in tourism
	MEASURE 4.2.5	Establishing a model for the development of local social and environmental initiatives that can involve tourists
	MEASURE 4.2.6	Increasing the penetration of green business models in the economy
SUB-POLICY 4.3		
Management and valuation of natural values and protected areas for sustainable tourism development	MEASURE 4.3.1	Developing sustainable tourism management in safeguarded and protected areas

4.2.5. POLICY 5: Accessibility and sustainable mobility



Policy strategy

The proposed development policy on accessibility and sustainable mobility is one of the major upgrades of the existing national tourism strategies so far. It is based on the fact that tourists contribute a large share of harmful emissions through their usual travel habits.

The policy is therefore primarily focused on significantly reducing emissions from Slovenian tourism. To this end, the deployment of significantly more sustainable or pilot zero-emission forms of mobility for passengers (guests/tourists) and goods (green supply chains) will need to be supported at the level of individual tourism providers and destinations, as well as at the level of the country as a whole.

This includes appropriate adjustments to reduce the number of private cars (running on fossil fuels), upgrade the integrated public passenger transport system to meet tourism needs, and to redefine Slovenia's priority forms of accessibility according to the carbon footprint per passenger and the value added of each market.

The policy also addresses the need to develop a model to maximise the positive impact of "pit stop" (transit) tourists. It also highlights the importance of effective mobility management in destinations, ranging from professional and comprehensive mobility planning in destinations and by tourism providers to activities for the regulation of stationary traffic at/near tourist sites or destinations, the introduction of new forms of mobility in destinations through a common integration platform, the introduction of e-mobility and zero-emission or car-free destinations, and the integration of mobility into smart tourist destinations.

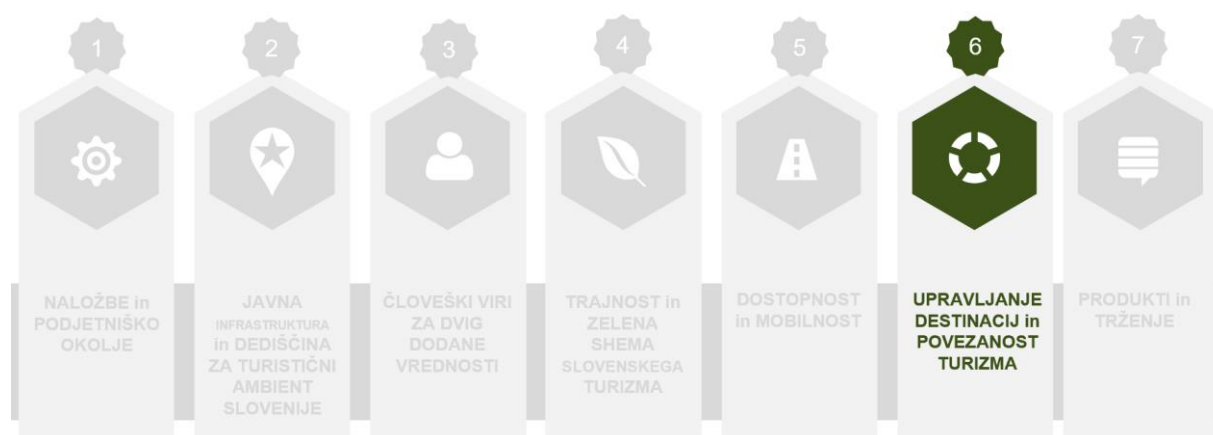
The public passenger transport system and single tickets must be more actively integrated and adapted to tourism. In order for the policy to be effective, it is essential to outline a comprehensive campaign to raise awareness of the importance of sustainable mobility and to integrate it into all marketing communication activities promoting Slovenian tourism.

This development policy includes measures in three areas or sub-policies:

Policy 5 ACCESSIBILITY AND SUSTAINABLE MOBILITY		
<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
SUB-POLICY 5.1		
Supporting Slovenia's accessibility as a low-carbon destination	MEASURE 5.1.1	Incentives to strengthen Slovenia's air connections with higher value added markets
	MEASURE 5.1.2	Incentives to strengthen Slovenia's international rail and bus connections with nearby key emitting markets
	MEASURE 5.1.3	Encouraging the development of cross-border cycling and hiking infrastructure

	MEASURE 5.1.4	Developing a model to maximise the positive impact of "pit stop" (transit) tourists
SUB-POLICY 5.2		
Deployment of zero-emission mobility	MEASURE 5.2.1	Co-financing the development of integrated transport strategies in leading tourist destinations and mobility plans for tourism businesses
	MEASURE 5.2.2	Promoting the development of "P+FEEL" systems for access to the busiest tourist sites – destinations and in the areas with natural values
	MEASURE 5.2.3	Creating new forms of mobility in tourist destinations
	MEASURE 5.2.4	Accelerating e-mobility
	MEASURE 5.2.5	Pilot deployment of car-free tourist destinations
SUB-POLICY 5.3		
Integrated public passenger transport	MEASURE 5.3.1	Integrated PPT for tourism needs
	MEASURE 5.3.2	Inclusion of tourist routes in the PPT system
	MEASURE 5.3.3	Promoting the establishment of high-speed public transport connections between airports/urban centres and tourist centres and between major tourist sites/destinations

4.2.6. POLICY 6: Destination management and tourism integration



Foundations of development policy

The Slovenian tourism industry does not have an established systemic organisational structure in place. The development and management of the tourism industry and horizontal and vertical integration at the destination, regional and national levels depend on the initiative of stakeholders. The solutions in practice vary significantly, but with individual examples of good practice, the overall picture at the national level is closer to chaos rather than synergy. As the quality of visitors' experience is particularly dependent on experience at local and regional levels, regulating this area is one of the key challenges for increasing quality, sustainability and value added of Slovenian tourism.

The public agency Slovenian Tourist Board is the only official destination institution in current legislation (ZSRT-1). Pursuant to the Promotion of Tourism Development Act (ZSRT-1), the competent ministry may grant legal entities operating in the tourism industry public authorisation to carry out specific administrative tasks. Currently, only the Tourism and Hospitality Chamber of Slovenia has been granted such an authorisation to manage the procedures for regulating the travel agency and tour guide activities. The ministry may also grant the status of a legal entity performing activities in the public interest. Currently, such status has been granted to the Tourist Association of Slovenia, the Congress and Tourism Office, two tourist associations (Lendava and Dolenjska & Bela Krajina) and four smaller associations. This status allows recipients to obtain budget funds even without a public tender, but the statute's more specific purpose is not defined. It could hardly be seen as a deliberate systemic measure.

Destination management boards, which in practice are the most important coordinators and managers of tourism at the local level, are not even mentioned in the legislation. The current law does not provide any guidelines for horizontal and vertical integration at the level of tourist areas and regions, nor for cooperation with the Slovenian Tourist Board.

The Promotion of Tourism Development Act (ZSRT-1) provides that the planning, organisation and promotion of tourism development is under the responsibility of municipalities. The aforementioned law specifies the activities and services that are in the public interest to be provided at the level of the tourist area, and identifies the earmarked sources of funding to meet these needs. It is up to the municipalities to decide the way in which this content should be implemented and who should implement it, which is why in practice we have very diverse solutions with very different results. The majority of the municipalities where tourism is more developed have set up destination management boards, mostly as public institutions, following the example of good practice from abroad. However, there is also a wide range of very different examples. Some municipalities promote tourism as part of the activities provided by their professional services; in many places, regional development agencies engage in tourism at the destination level; in some cases tourism is promoted through tourism associations; and there are a number of institutions engaging in tourism besides other content, the most common combinations being sport, culture, youth. There is no systematic overview of these organisations and no real evaluation of

their actual effects. The huge diversity without a systemic framework is a major obstacle to compatibility, integration, the development of a common strategy and the achievement of synergistic effects of destination-based tourism management in Slovenia.

In the previous strategy, two major measures were planned in relation to destination management at the national level: (1) **to strengthen the role of the Slovenian Tourist Board as a strong national centre for the marketing and promotion of tourism** — the measure has been successfully implemented; and (2) **to transform the Tourism Directorate into a platform for the effective coordination of tourism development measures at the national level** — this measure aimed at strengthening development functions, e.g. the Directorate was tasked with drafting integrated plans for the development of tourism in macro destinations — the measure has not been implemented.

This means that in the previous strategic period Slovenia provided high-quality overarching marketing support at the national level but failed to establish development institutions. The gap between the attracting marketing image of Slovenia's tourism portfolio and the less successful reality is therefore also widening.

The strategic Slovenian tourism goal addressed by development policy

SG5: ESTABLISHING COMPETENT AND EFFECTIVE MANAGEMENT STRUCTURES, which are crucial for the effective management of tourism flows in destinations; for the targeted and controlled development of tourism that embraces the principles of sustainability; for strengthening a business environment conducive to improving the quality of services and increasing value added, to a closer link between actual tourism portfolio and the overarching marketing activities, to a more effective integration and cooperation at all vertical and horizontal levels and to achieving the goals of this Strategy.

Policy strategy

In the previous strategic period, the Ministry of Economic Development and Technology and the Slovenian Tourist Board (STB) attempted to solve part of the problem relating to the disorganisation of Slovenian tourism as part of the strategy, leading to two measures being implemented:

1. Four geographical **macro destinations** were identified, which presented a diverse Slovenian tourism portfolio of products and services in a simple and comprehensible way; this proved to be a good and effective marketing and communication concept, even if it is unsuitable for development and management content.
2. The concept of "**a leading destination**" was introduced, with its status based on rather vague criteria. There are currently 35 destinations, and they vary considerably in terms of the scope of their activities. For example, the largest destination recorded 2,200,000 overnight stays in 2019, while the smallest recorded 22,000. The leading destinations also differ in the organisational forms of destination management boards — the vast majority are public institutions; two are organised as economic interest groupings, six are limited liability companies of which the majority are regional/local development agencies for which tourism is only a small part of the activity. Introducing this concept has given us an instrument through which the State can promote the development of priority content by means of dedicated calls for tenders. Thanks to such calls, many destinations have significantly shortened and accelerated the period that would otherwise have been needed to develop marketing, digital skills and new products. However, there was insufficient control over the appropriations of the funds, also in terms of their efficiency and the outcome of their use.

The first steps have therefore been taken, but they are not sufficient and need to be developed further. Competent destination management boards in European countries with developed tourism are a key ingredient of success and competitiveness of the overall tourism portfolio of tourist destinations, as well as of the performance and competitiveness of private and public providers within the tourist area. They are the link between the business, public and non-governmental sectors, the facilitator of cooperation

between different sectors, the holder of the destination marketing activities and the developer of destination brands, the manager of infrastructure and tourist sites, the promoter of product development and value added, the holder of green strategies in the destination, etc. – in other words, a common denominator of many structures, content and interests.

However, in order to be able to perform their tasks successfully, they need to be integrated into an efficient system both horizontally and vertically.

In the new strategic period, we will therefore build on the initial steps, harmonise and standardise the essential content in the work of destination management boards, improve management and staff competencies, upgrade the system of leading destinations, put in place a sound organisational structure, and provide the legal basis and stable funding.

We will harmonise the most basic criteria and conditions, and build a bottom-up system at the substantive level – from the local to the regional and national levels.

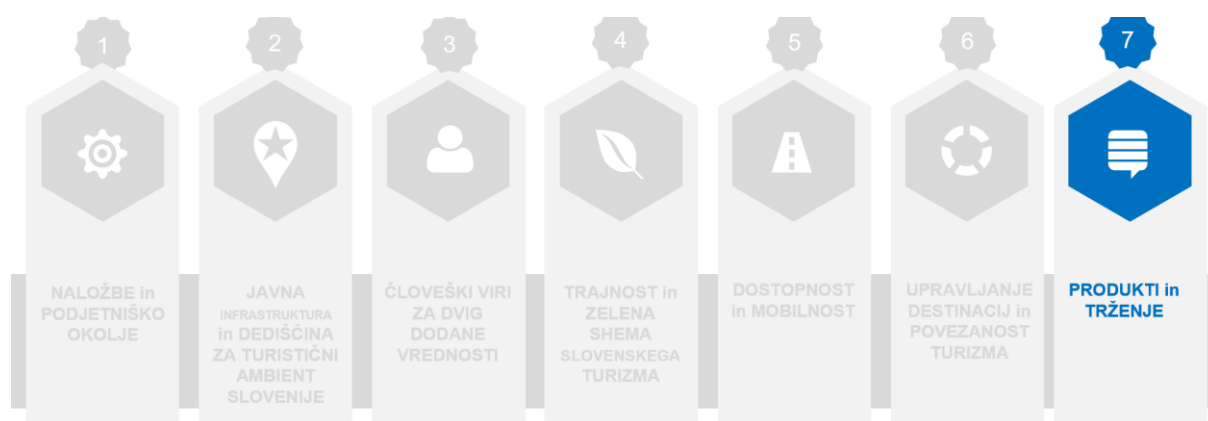
At the overarching level, we will provide a legal basis, earmarked spending and additional funding for content in line with the Strategy's priorities.

This development policy thus includes measures in three areas or sub-policies:

Policy 6 MANAGEMENT AND INTEGRATION OF TOURISM		
<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
SUB-POLICY 6.1		
A clearer definition of the content of destination management boards' activity with a focus on development and management functions; increasing the competencies of destination management organisations	MEASURE 6.1.1	Harmonising the content and understanding of destination management boards' work with the current tourism development needs and the Strategy's priorities
	MEASURE 6.1.2	Providing a model of support and training for destination management board employees
	MEASURE 6.1.3	Providing a model of support and training for providers, partners and all tourism-related stakeholders in destinations
	MEASURE 6.1.4	Providing a vehicle for development and management initiatives at the national level — increasing the scope of the STB's functions and strengthening the development function of the Ministry of Economic Development and Technology
SUB-POLICY 6.2		
Establishing the organisational structure of Slovenian tourism as a supportive environment for further growth in line with the Strategy's priorities	MEASURE 6.2.1	Upgrading the model of leading destinations
	MEASURE 6.2.2	Developing and approving the model, conditions and incentives for regional integration
	MEASURE 6.2.3	Ensuring vertical integration from national to local levels
	MEASURE 6.2.4	Developing integrated tourism development plans
SUB-POLICY 6.3		
Adapting legislation and ensuring stable sources of funding	MEASURE 6.3.1	Including destination management boards in the Promotion of Tourism Development Act (ZSRT-1) as a form of tourism organisation at national, regional and local levels, and ensuring stable sources of funding
	MEASURE 6.3.2	Examining the introduction of a contribution to promote the development of tourism and tourism infrastructure by tourism and tourism-related organisations
SUB-POLICY 6.3		
	MEASURE 6.4.1	Increasing the competencies of destination management boards and providers

Direct promotion of tourism development at destination and regional levels	MEASURE 6.4.2	Strengthening marketing activities and developing destination brands
	MEASURE 6.4.3	Providing support for the development of tourism products, small-scale tourism infrastructure and the management of tourism flows
	MEASURE 6.4.4	Reviewing and streamlining the identified jobs, pay and remuneration systems in destination management boards

4.2.7. POLICY 7: Products and marketing



Foundations of development policy

In the previous strategic period, Slovenia best implemented its goals and measures set in for marketing, where it has fully realised and strengthened its vision and international position as a "global green boutique destination". However, in view of the tourism turnover and financial categories in the past period, Slovenian tourism has failed to reach the target market segment of the "more demanding visitors looking for diverse and active experiences, peace and personal benefits".

The product matrix in the previous strategy covered the key scope of the Slovenian tourism portfolio. It clearly highlighted the first line of three key ⁴products (which have the highest realisation and impact on Slovenia's image and which are also supported by product associations) and identified the second level of secondary/supporting ⁵products (with a lower impact on revenues and image and which are mostly not organised, with the exception of rural tourism/tourism farms).

The evaluation of the previous strategic period and the analysis of the situation have highlighted a significant lag in the quality of tourism portfolio products and services and their competitiveness, as well as a lack of proactive product development at all levels (starting with the overarching level). All key products face a lack of investment in product infrastructure and services, including the human resources. The key supportive management-oriented measure of transforming the

⁴The following were identified as KEY products (the most important products in terms of their impact on revenues and image = Category 1): Holidays in the Mountains and Outdoors, Health & Well-being and Business Meetings).

⁵Products in three categories were identified as SUPPORTING/SECONDARY products:

Category 2 (products having a strong impact on revenues and image): Experiencing Nature, Culinary Arts, Culture and Touring.

Category 3 (products having a minor to medium impact on revenues and image): Sports Tourism, Sun & Sea, and Countryside Tourism.

Category Other: Gambling, Cruising & Yachting, Shopping, Special Interests.

Tourism Directorate into a platform for the effective coordination of tourism development measures at the national level was not implemented in the previous strategic period. During this period, the Slovenian Tourist Board's product development role has been strengthened mainly in terms of awareness of the importance of the development and management – in parallel with the paradigm shift from marketing towards management at the destination level, which the STB successfully promoted (and which was crucially supported through the invitations to tender for leading destination development launched by the Ministry of Economic Development and Technology), but at the same time it lacked the necessary resources to actively manage the development of the products at the overarching level. *The development of food service establishments (in terms of supply and Slovenia's positioning and contemporary cultural image) is proof that it is possible to make shifts in a relatively short period of time with focused and accelerated development.* This is the key to more focused and accelerated development and active management at destination and business levels.

Another challenge concerns the entire vertical integration of destinations and products, where there are no clear responsibilities and tasks (the Slovenian Tourist Board — product association — region/destination – business level) — which further weakens the effectiveness of destination management and product development. Thus, the urgently needed shifts in product development did not occur in the previous strategic period – not even in the context of products that created their own associations. With a high-quality overarching promotion, the gap between the intensively communicated promise and the current situation on the supply side of Slovenian tourism has widened even further.

As regards markets, it can be assessed that in the previous strategy they were not sufficiently aligned with the current realities on the ground and the supply side, which is why the Slovenian Tourist Board, in cooperation with the tourism industry and destinations, has set a different market strategy. Also, in response to changes in the environment the markets needed to adapt quickly to the current state of play (the pandemic and the war in Ukraine, which has caused wider implications for tourism flows). The envisaged development plans for the selected markets have not been implemented (the plans were revised annually as a result of the situation and set as part of the Slovenian Tourist Board's annual or biennial work programme), and the ROMI approach (measurement of the Return on Marketing Investment; although compatible with the Balance Score Card system set by the Slovenian Tourist Board), was not successful. The COVID–19 pandemic has – at least in the medium term – significantly changed the focus of individual products (e.g. the Outdoors product will recover faster than the meetings industry) and at the same time subverted the structure of the markets – near and medium-distance markets will be more important than remote markets, at least in the medium term. The pandemic has also required an overarching approach to addressing the domestic market, which was not previously covered by the Slovenian Tourist Board. In this context, the pandemic has highlighted the need to develop new products or portfolios, as well as an integrated destination portfolio tailored to clear, demanding and clearly analysed and located target segments in individual markets, as a lever for more focused and fast-responsive marketing.

Policy strategy

The key lever for implementing the product marketing policy

The Slovenian Tourist Board (STB), as a public marketing agency, which is the only formally defined destination institution in the current legislation (ZSRT-1), **is the promoter of tourism at the overarching national level and the key image-maker of the Slovenian tourism portfolio on international markets.**

It carries out its mission on the basis of two-year work programmes, which are grounded in the orientations set out in the current strategy, the analysis of the current global situation, and in partnership with destination management and regional tourist boards and the Slovenian tourism industry.

Marketing (marketing communication or promotion) remains the core function and mission of the Slovenian Tourist Board, but in the new strategic period its role has been widened to include

management and product development and to guide the digital transformation of Slovenian tourism.

The concept and implementation of product marketing policy take into account:

- a) the guidelines and measures set out under **Policy 6 (Destination management and integration of tourism)**;
- b) the guidelines and measures set out under horizontal **Policy 9 (Digitalisation and flow of information to make Slovenian tourism more efficient)**;
- c) the guidelines and measures set out under the present **Policy 7 (Products and marketing) – presented below.**

The current key products have been prioritised in terms of (1) their contribution to value added, (2) their contribution to managing seasonality and tourism flows, (3) market potential, (4) support to the achievement of goals and vision, while the markets have been prioritised in terms of (1) a well thought out long-term strategy targeting markets and segments with higher value added, (2) their stability, growth and sustainability, (3) their contribution to reducing the carbon footprint of Slovenian tourism, and (4) the ability to target higher value added market segments.

In the chosen development Scenario 3 ("**A little bit more and a lot better**"), the greatest weight of effort and change is primarily on the supply side of Slovenian tourism, which will also have to deliver on this promise through higher quality, green boutiqueness, value added services and holistic experiences. **All previously outlined policies are geared towards this goal and are a fundamental prerequisite for targeting more demanding segments.**

However, despite the currently limited tourism portfolio tailored to the more demanding segments (high quality products and services with boutique elements are, at least in the summer, quickly taken up and are basically limited), the overarching marketing policy of Slovenian tourism (implemented through the Slovenian Tourist Board) must follow the principles of focusing on higher value added markets, on segments with above-average readiness to travel during non-summer months and, importantly, it must inspire the selected markets with the great potential and attractiveness of the diverse (green, active, cultural, healthy) experiences in Slovenia. Furthermore, the Slovenian Tourist Board needs to upgrade its "traditional promotion" to more socially responsible marketing aimed at achieving strategic and tactical goals, and to conduct market/segment policy effectively (strategically and in the long-term, but also responsively and flexibly) in view of unstable health and security situation.

This development policy thus includes measures in three coherent areas or sub-policies:

The first sub-policy (PRODUCTS) defines the necessary strengthening and increasing of product marketing's management efficiency across the entire vertical (Ministry of Economy and Technical Development/Slovenian Tourist Board – product associations – regions/destinations – business level), which is implemented in close interdependence (both in terms of programmes and organisation) with the measures under Policy 7 and Horizontal Policy 8. The other two sub-policies identify only those measures in the areas of distribution (or markets/segments) and promotion that are necessary as additional measures (to the existing regular activities under the Slovenian Tourist Board's two-year regular work programmes) for Slovenia to make the necessary upgrades to its marketing model to support the achievement of its goals and vision.

<i>Sub-policy</i>	<i>Measure</i>	<i>Name of the measure</i>
Policy 7: PRODUCTS and MARKETING		
SUB-POLICY 7.1		
Strengthening and increasing the management efficiency of the product marketing across the entire vertical	MEASURE 7.1.1	Developing and applying a model to strengthen the management of product development at the overarching level of Slovenian tourism and to strengthen the role and competencies of product associations
	MEASURE 7.1.2	Systemic financial development support for product associations and other product providers
	MEASURE 7.1.3	Systemic financial development support for new integrated products of national/regional importance
SUB-POLICY 7.2		
Increasing the stability, value added and sustainability of sales channels and markets, with a focus on targeting more demanding segments	MEASURE 7.2.1	Updating and simplifying the segmentation model
	MEASURE 7.2.2	Developing and applying a model to support decision-making in marketing
	MEASURE 7.2.3	Developing a national programme for the promotion of direct booking channels and implementing it at the destination/tourism portfolio level
	MEASURE 7.2.4	Examining the feasibility and setting up a national system to promote the sale of accommodations and experiences
	MEASURE 7.2.5	Providing financial incentives for receptive and DMC agencies and marketing associations to target niche markets and more demanding segments
SUB-POLICY 7.3		
Upgrading marketing communication and promotion to support the vision	MEASURE 7.3.1	Developing a communication concept and gradually shifting from "traditional" promotion to more socially responsible marketing for an overall increase in value added
	MEASURE 7.3.2	From Slovenia as an example of good practice in expert circles to the understanding of the green story as a generator of greater value added for Slovenian tourism in the general public
	MEASURE 7.3.3	Strengthening synergies and pooling funds for promotion through a co-marketing platform and co-branding partnerships
	MEASURE 7.3.4	Updating the overarching communication platform under the "I feel Slovenia" brand for foreign markets
	MEASURE 7.3.5	Nationwide internal communication campaign for a tidier, more welcoming and green Slovenia

Matrix of Slovenian Tourism Products (MSTP)

MSTP stands for a matrix that classifies products (product groups) identified as key products at the overarching level of Slovenian tourism.

INTRODUCTORY EXPLANATION OF TERMINOLOGY:

The products in the MSTP are classified by product group or product category rather than by marketable (designed and ready-to-sell) product. These are then developed at regional/destination/supply level. Product categories may include a larger number of sub-products or product segments (which must be addressed separately on the market, depending on the specifics of the target segments) or types of tourism.

Figure 5: The Matrix of Slovenian Tourism Products (MSTP), which shows the importance or position of individual products identified at the overarching level of Slovenian tourism, in accordance with the given criteria.



THE MATRIX OF SLOVENIAN TOURISM PRODUCTS (MSTP)	
The MSTP classifies products (product groups) that have been identified as key products at the overarching level of Slovenian tourism (products are classified into 3 different categories)	
Po celotni piramidi se spodbuja UVELJAVLJANJE KRITERIJEV oziroma principov razvoja produktov:	THE ADOPTION OF CRITERIA or principles of product development is encouraged through the entire pyramid:
<ul style="list-style-type: none"> 5-zvezdičnih doživetij (= lokalno-avtentično-edinstveno-izkustveno-zeleno-butično-premium-dodana vrednost-desezonalizacija-dobra digitalna izkušnja) 	<ul style="list-style-type: none"> Five-star experience (= local-authentic-unique-experiential-green-boutique character-added-premium-value added-de-seasonalisation-good digital experience)
<ul style="list-style-type: none"> Kriteriji za zelene produkte 	<ul style="list-style-type: none"> Criteria for green products
I. VODILNI PRODUKTI	LEADING PRODUCTS
Aktivnosti v naravi	Outdoor activities
Zdravje in dobro počutje	Health and well-being
Kultura in zgodovinska mesta	Culture and historic cities
Industrija srečanj	Meetings industry
I. HORIZONTALNI POVEZOVALNI OZIROMA PRODUKTI	HORIZONTAL OR LINKING PRODUCTS
Gastronomija	Culinary arts
Doživetja narave (odgovorno doživljanje narave)	Experiencing nature (in a responsible way)
Kultura in zgodovinska mesta	Culture and historic cities

Touring (krožno potovanje, izleti, transitni pit-stop obiskovalci)	Touring (excursions, transit pit-stop visitors)
II. NIŠNI PRODUKTI	NICHE PRODUCTS
Zabava in igre	Fun and games
(igrificirana doživetja, tematski parki, izkustveni muzeji)	(gamification experiences, theme parks, experiential museums)
Filmska produkcija	Film production
POSEBNI INTERESI	SPECIAL INTERESTS
Priprave športnikov in športne prireditve	Athletes' training and sports events
Počitnice na kmetijah	Holidays on farms
Križarjenje	Cruising
Mladinski turizem	Youth tourism
Igralništvo	Gambling
Dostopni turizem	Accessible tourism
Digitalni nomadi	Digital nomads
DRUGI posebni interesi/nišni produkti	OTHER special interests/niche products
AKTIVNOSTI TRGA = MARKET ACTIVITIES	1. Market size
	2. Market growth
	3. Value added and pricing policy
	4. Multiplier
	5. Product carbon footprint
	6. Intensity of competition
	7. Differentiation potential
	8. Level of industry risk
	9. Trends – readiness for a new normal
	10. Financial sensitivity of the product segment
	11. Proximity, sustainability and stability of markets
KONKURENČNOST SLOVENSKEGA PRODUKTA = COMPETITIVENESS OF THE SLOVENIAN PRODUCT	1. Existing value added
	2. Potential for creating/increasing value added
	3. Product sustainability
	4. Impact on revenues (cash cow) – realisation
	5. Need for investment
	6. Impact on Slovenia's image
	7. Slovenia's position of the product segment on target markets (measured through GDC)

	8. Product's potential to target more demanding segments
	9. Outstanding stories
	10. Year-roundness
	11. Contribution to value for all stakeholders
	12. Product organisation
TRETJA DIMENZIJA – HORIZONTALNOST PRODUKTA = THIRD DIMENSION – PRODUCT HORIZONTALITY	1. Degree of product integration into other products – how much the product contributes to the differentiation and value added of other products

The products in the MSTP are classified into 3 different categories:

1. **Leading products, which**, according to the determined criteria, are the strongest, most important or have a strong potential for further growth. They are placed on an attractive (growing) market, although some products (most notably the meetings industry) have been severely affected by the COVID–19 pandemic, not only in the short term but at least in the medium term.

Compared to the previous strategy (which positioned products solely on the basis of their impact on (1) revenues and (2) image), the criteria are derived from a larger number of criteria indicating all the elementary building blocks for increasing the competitiveness of products. They are assessed against:

- a) **Market Attractiveness:** how attractive the market for the product is (volume, growth rate, value added and the pricing policy, multiplicity and carbon footprint, the intensity of competition, differentiation options), with important categories added in view of changed global conditions, such as the degree of risk in the industry, trends – the readiness of the market of products for a "new normal", financial sensitivity in the product segment, and the proximity, sustainability and stability of markets.
- b) **Competitiveness** (of the Slovenian product) in this product segment, to which – in addition to the size of the product or the volume of sales, the investment required and the impact of the product on Slovenia's image – the categories reflecting the goals and vision of the new strategy have been added and highlighted: existing value added and potential for creating/increasing value added, the product's sustainability (to what extent it is already sustainable or is being implemented in a sustainable way), turnover, Slovenia's position in the product segment on the target markets (measured through the Global Digital Campaign — Slovenian Tourist Board), the product's potential to target more demanding segments, the indication of existing outstanding stories (which are important drivers of visibility), the year-roundness, the contribution of the product's value to all stakeholders (not only the market host or operator), and the product's organisation, which is also an important category.
- c) **The product's horizontality has been added as the third category** to evaluate the extent to which a certain product is inclusive, complementary, and important for increasing distinctiveness and value added to other products.

2. **Linking or horizontal products** are those products that can otherwise constitute an independent motive for arrival on the market – currently to a lesser extent in Slovenia, but they are an extremely important part of other products. They are an indispensable part of the products in the upper and lower part of the MPST. They are also very important for increasing value added and distinctiveness.

3. At the bottom of the pyramid there are **special interest tourism and niche products** — i.e. products targeting a specific segment that has clearly defined needs or specific marketing channels, or products that are smaller in scope (niche).

A special place is given to five-star (boutique) experiences and green products with a strongly pronounced sustainable component and with a higher value added. THE ADOPTION OF CRITERIA or principles of product development is encouraged throughout the pyramid:

- > **Following the principles of "Five-Star (Boutique/Unique) Experiences"** (as defined by the Slovenia Unique Experiences collection, owned and managed by the Slovenian Tourist Board and applicable more broadly to what we refer as "five-star" experiences). There are (currently) approximately 40 criteria in the following 10 thematic groups: local–authentic; unique; experiential; green; boutique character; premium; value added; de-seasonalisation; good digital experience. Although the concept of "five-star experiences" is no longer in the new vision, this principle remains and the Strategy guides the entire Slovenian tourism industry towards creating experiences with a higher quality, towards more personalised experiences with a strong local and authentic character (unique, boutique ... experiences of Slovenia). In the new strategic period, the Slovenian Tourist Board is tasked to actively manage the collection and, through education processes (as defined in Policy 7), encourage both destinations and providers to create experiences that will allow for a greater valuation of these sales products on the market, as well as experiences truly designed in a way to be commercially viable. The key to this is the cooperation of incoming travel agencies, DMC agencies and destination DMC agencies (that are not only experts in the local tourism portfolio, but are also organisers and operators – and are referred to as destination specialists). The strategy proposes that the category "LOCAL (Unique/Boutique) Experience" should be added to the database management of the Slovenia Unique Experience collection, which can be verified through local collective quality brands, and which allows for a greater number and commercialisation of five-star experiences. Such experiences may become an integral part of the portfolio for the national scheme promoting accommodation and experiences (*Measure 7.2.4*).
- > **Criteria for green products — referred to as those that are made and provided in accordance with sustainability principles (and can be designed as part of the culinary arts, outdoor activities, culture, etc., and are not only nature-based)** and those that also comply with clear standards of sustainable practice. The criteria are currently defined in the framework of the activities of the Slovenia Green Consortium. It is important that they are reviewed, upgraded if necessary and, what is crucial, adopted with respect to all products that are included in the MPST and marketed through the Slovenian Tourist Board's channels.
- > **Much attention has been devoted to the considerable importance of excellent and well-trained tourist guides and specialised guides**, as they are crucial for the high-quality, safe, in-depth and more individual experience of each product, destination and for Slovenia. In this context, guides are the core generator of higher value added – rather than only being part of the product, they are also the creators of the experience and extremely important communicators of Slovenia's green story.

4.2.8. HORIZONTAL POLICY 1: Digital transformation of Slovenian tourism



Foundations of horizontal development policy

The basic strategic goal of this development policy is to achieve tangible benefits for the tourism industry and in particular its value added through the process of digital transformation, create the conditions for

data-supported decision-making, support direct links between communication and sales channels between Slovenian tourism providers (tourism businesses and destinations) and end-customers (tourists) and to establish smart tourist destinations.

The proposed measures and activities build on the Slovenian Tourism Digital Transformation Strategy (hereinafter: the STDT strategy), adopted by the Slovenian Tourist Board in March 2022. The measures, as planned in the STDT strategy, should be planned and implemented holistically and in line with the baseline activities listed below, which we have structured according to the strategic pillars set out in the STDT strategy and included in a meaningful way under the individual key policies.

Against this background, the policy on the digital transformation of Slovenian tourism is classified as a horizontal policy.

1. Data support for decision-making in tourism at all (business, destination, national) levels (*linked to the smart destination management in the STDT strategy*):
 - a. Merging existing databases;
 - b. Efficient information support for business and development decision-making;
 - c. More comprehensive monitoring of business performance with a digital tool for monitoring performance indicators (KPI), sustainability and carbon footprint, benchmarking and indicators of the achievement of strategic goals at all levels of Slovenian tourism.
2. Sales marketing and marketing communication at all levels (*related to the "advanced marketing and sales" in the STDT strategy*) at the following levels and with the following orientations:
 - a. Business level;
 - b. Destination level (local and regional destinations and local communities);
 - c. National level (Slovenian Tourist Board, Ministry of Economic Development and Technology, other ministries, national institutions and associations);
 - d. Information linkage of data and information flows between all levels;
 - e. Increased outreach, improved targeted marketing, higher degree of directness (without intermediaries) between providers and end-customers;
 - f. Reducing marketing costs (costs of services);
 - g. Increasing the value added of tourism providers and tourist destinations as a result of the digitalisation of marketing and sales;**
 - h. Pursuing policy aimed at providing online booking and sales platforms and conditions (platforms having monopolistic — oligopolistic position in the market) by reducing the cost of commissions and promoting the direct access of tourism providers to end-customers.
3. Efficiency of tourism management at **national, destination and business levels** (*linked to "smart business solutions" in the STDT strategy*):
 - a. Digitalising management processes and functions at all levels;
 - b. Optimising operational costs through digitalisation of process management, supervision and control;
 - c. Managing revenues more efficiently and increasing value added as a result of the digitalisation of management processes and functions;
 - d. Optimising tourism and tourism-related services and improving the customer experience;
 - e. Using digital tools to support the decarbonisation process.
4. Information, education and training to increase the competitiveness of human resources through digital tools and applications (*linked to the "competitive staff" referred to in the STDT strategy*):
 - a. Increasing the prestige and attractiveness of the tourism and hospitality professions through digital online applications and social networks;
 - b. Increasing the accessibility, speed, adaptability and efficiency of training and education in tourism industries through online applications;
 - c. Increasing accessibility and ties between employers and employees in the tourism industry — promoting the accessibility and transparency of the tourism skills and labour market;

- d. Increasing the digital skills and digital competencies of tourism and hospitality professions (upgrading the content of educational programmes) and staff (digital training programmes);
- e. Increasing the productivity (value added) of human resources in tourism as a result of digital skills and the use of digital tools in other strategic areas.

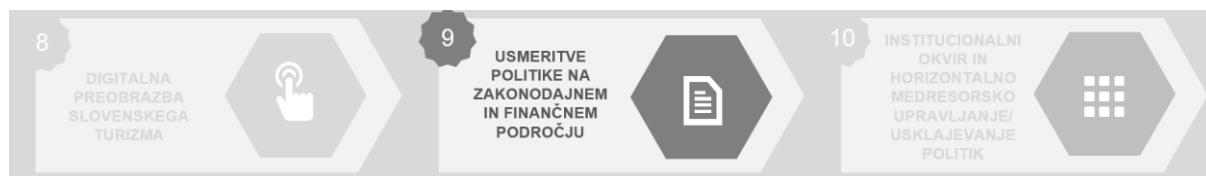
Horizontal policy strategy

The implementation of the proposed policy and measures supports the improvement of the quality of services and the experiences of the Slovenian tourism portfolio, the development of innovation, the productivity and performance of Slovenian tourism businesses, and the further development of Slovenia in general. The proposals are aimed at effectively supporting the operation, monitoring, planning, the management of flows and future direction of tourism development. They include existing and new information, booking and statistical databases. Pursuing the policy towards providing online booking platforms and conditions (agreement at EU level concerning the monopolistic, oligopolistic market situation) will also be very important.

This horizontal development policy includes measures in four areas/sub-policies:

SUB-POLICY 8.1	Data support for decision-making in tourism at all levels
SUB-POLICY 8.2	Sales marketing and marketing communication at all levels
SUB-POLICY 8.3	Effective management of tourism at all levels
SUB-POLICY 8.4	Competitiveness of human resources through digital tools and applications

4.2.9. HORIZONTAL POLICY 2: Legislative and financial policy orientations



Key overarching challenges addressed by horizontal policy

Regulatory framework for the development of tourism

In general terms, the regulatory framework for the operation and development of the Slovenian tourism industry encompasses an extremely wide range of legislation governing business environment conditions, tax, consumer protection, environmental protection, construction sector, spatial planning, culture, agriculture, labour law, visa requirements, education and regulation of professions, etc. and sector-specific legislation governing tourism and hospitality industries.

Due to tourism's extremely cross-sectoral nature, it is the broader legislative conditions that have the greatest impact on the business operations of tourism providers and the performance and success of the Slovenian tourism industry. **The facilitation and simplification of legislative, administrative and tax requirements and procedures is a broader but very important challenge for the success of most of the envisaged strategic development policies for Slovenian tourism.**

Moreover, there are also specific challenges to the sectoral tourism and hospitality legislation, such as the Hospitality Industry Act and its implementing regulations, and the Promotion of Tourism Development Act, which either restrict the entry of new providers into the market, reduce the competitiveness of entrepreneurs and destinations, or limit the increase in value added in the Slovenian tourism industry.

Financial framework for the development of tourism

In the previous strategic period (2017–2021), the promotion of the development and marketing of Slovenian tourism benefited from more substantial funding compared to previous periods, which fuelled the increase in Slovenia's international visibility as a green tourist destination, as well as an increase in quantitative development indicators. In particular, support provided to the tourism industry was sufficiently robust during the COVID-19 crisis, and, despite the drastic threats of the industry's complete closure, made it possible to preserve businesses, entrepreneurs and most jobs in tourism and to mitigate the loss of international tourism traffic through measures to stimulate domestic tourism demand.

However, a key challenge remains to reboot the industry depleted by the COVID-19 crisis, provide favourable funding for much-needed investments to raise quality and competitiveness, and to establish and increase the attractiveness and management of destinations at the local level. On the demand and marketing side, Slovenia's tourism will have to face the challenges of investing in higher value markets and segments and in restructuring products, markets and segments in the next period because of the strategic and objective external circumstances of the health and security-political crisis. Even without taking into account the negative effects of the COVID–19 crisis, the structural challenges facing Slovenian tourism, which are reflected in low value added, inadequate price positioning and a lack of human resources, mean that in the next strategic period Slovenian tourism will need, above all, capacity building and investment on the supply side, at the business level, in human resources and in the management of destinations.

Without sizeable investment on the supply side, Slovenian tourism could be stuck in the long term in a rut of a relatively low level of competitiveness and value added, unable to generate

more value for all stakeholders, which would undermine the basic vision for the 2022–2028 strategic period.

Foundations of horizontal development policy

Following the main strategic goal and vision of Slovenian tourism in the 2022–2028 period, i.e. a sustainable increase in value added by increasing quality, diversity, boutique character and value chain, is the basic starting point of a supportive horizontal policy in the legislative and financial spheres.

The legislative policy aims to facilitate and simplify the conditions for the creativity of the many and varied private economic initiatives and also public functions in tourism, and for the creation and successful operation of as many family businesses as possible, and to stimulate the quality of services and products and the integration of value chains in tourism. The key orientations of the regulatory framework for tourism development also include the promotion of integration and more efficient management of destinations and regions, and vertical links between local and national tourism stakeholders.

In financial policy, funding instruments, financial incentives and authorised state aids are primarily geared towards supporting investments, with a focus on the significant upgrade and renovation of existing capacities, investments in human resources, digitalisation, sustainable and green solutions, investments in valuation of cultural and natural heritage in tourism, and on the upgrading and improving the quality of public and common tourism infrastructure in tourist destinations.

Financial resources are also provided to establish and improve the quality of tourist destination management and the branding of authentic cultural and natural elements in the tourism portfolio of destinations, regions and Slovenia as a whole.

Financial incentives support the cross-sectoral integration of businesses into value chains and sustainable forms of tourism portfolio. They also encourage joint action of local communities and their integration into effective and coherent tourist destinations and regions.

In marketing, funding and incentives are provided at national, regional and destination levels to restructure tourism products, markets and segments of Slovenian tourism into higher-value segments, reduce seasonal concentrations and to adapt to the new situation following the health and security-political crisis.

Financial measures are implemented to the greatest extent at cross-sectoral and inter-ministerial levels, combining measures and different sources of funding to achieve related goals with high synergies and multi-sectoral effects.

Financial incentives are also provided to the greatest extent through co-funding or direct investment on the part of the private sector, destinations, associations and local communities, all with the aim of achieving optimal results of the measures and ensuring a sufficiently large total volume of investments in development, geared towards common goals and towards achieving greater value for all stakeholders.

Horizontal policy strategy and measures

Regulatory framework:

Within the regulatory framework, as part of the supportive environment and framework for the performance and growth of the tourism industry, legislative adjustments and amendments to the relevant laws and implementing regulations are provided and also monitored, along with other implementing activities and guidelines for the implementation of legislation supporting specific strategic development policies.

Financial policy

With regard to the Strategy's delivery, funding is also intended for the implementation of individual strategic policies and measures in accordance with the envisaged action and financial plan of each policy and the priority of measures (set out in Chapters 7 and 8 of this Strategy Paper). The financial policy is implemented through inter-ministerial and cross-sectoral cooperation in the planning, pooling and securing of existing and new additional sources of funding for individual measures. The financial framework for the Strategy's delivery is based on targeted and highly focused financing activities and financial incentives, which are to be in line with the Strategy's development goals and the implementation of the individual measures envisaged. The principles of pooling funding sources from different sectors are of utmost strategic importance for achieving common goals as well as joint measures to meet the goals of several sectors. It is also important to involve private sources, such as businesses, destinations, associations, local authorities and tourist regions, to participate in the funding of individual measures for which incentives are provided.

The horizontal policy includes measures in two areas/sub-policies:

SUB-POLICY 9.1	Regulatory framework for the development of tourism
SUB-POLICY 9.2	Financial framework and incentives for the development of tourism with greater value

4.2.10. HORIZONTAL POLICY 3: Institutional framework and horizontal inter-ministerial management and policy coordination



Key overarching challenges addressed by horizontal policy

The cross-sectoral and inter-ministerial dimension of tourism and the dependence of tourism's success on different industries, sectoral policies and regulatory requirements are not sufficiently taken into account when managing and directing the development and conditions for the performance of the tourism industry at the national level. Another challenge is insufficient collaboration between tourism stakeholders at the local level in terms of management, delivery of quality character and a holistic destination experience. The vertical links between the institutions at local and national levels have also not been established, because the regional level, which could effectively ensure this link, does not exist in the destination organisation of tourism. The institutional framework for tourism is not optimally set up with all the functions for the integrated quality management and tourism development. All this has a negative impact on competitiveness and limits the creation of value chains and the growth of value added in the tourism industry.

Foundations of horizontal development policy

The development and ensuring condition of competition for the growth and performance of the tourism industry involves a wide range of sectors and ministries, which are also responsible for co-shaping the business environment, tax legislation, consumer protection conditions, environmental restrictions, spatial and landscape planning requirements and the construction of facilities, influence cultural elements and activities in destinations, food and drink production, determine labour and legal requirements, visa policy, education, the regulation of professions, and, of course, the operation and development of directly-related tourism and hospitality sectors.

The cross-sectoral dimension of tourism also requires a cross-sectoral and inter-ministerial approach to managing tourism development at the national level, which will contribute to the growth and successful operation of the tourism industry. In the same vein, cooperation among stakeholders at the local level is essential to ensure an integrated high-quality tourism portfolio of products and services developed by destinations and regions. Vertical links between the two levels – national and local – must also be effectively established, **all with the aim of achieving the integrity of the tourism portfolio, synergies between the different sectors and between the national and local levels.** Such coordination and coherence contributes to increasing the competitiveness, improving the institutional environment for the tourism development, and to creating synergies and greater value for all stakeholders.

The Strategy's delivery is also based on the establishment of cross-sectoral policies and sources of financing for tourism development and on the management of tourism development strategy by the Government inter-ministerial group in coordination with the Ministry of Economic Development and Technology.

The development goals of Slovenian tourism addressed by horizontal development policy

Directly:

- > DG 5.2 Establishing systemic and digitally supported local, regional, national and cross-sectoral cooperation at all levels
- > DG 5.4 Optimising financial resources (incentives, fees) for tourism development, which includes the completion of the consolidation process and the establishment of a model for the effective management, development and privatisation of state-owned assets in the tourism industry, with a specific model for the valuation, management and development of public-owned assets in the culture of tourism
- > DG 3.2 Increasing potential to take up business opportunities in tourism by promoting and understanding it as a platform for creating a market for the sale of a wide range of products and services

Indirectly:

- > DG 1.1 Balancing the quality, scale and structure of accommodation, food service, and other tourism-related ranges of products and services with targeted investment support
- > DG 3.3 Creating a more business-friendly environment, reducing barriers and burdens for existing entrepreneurs and making it easier for new entrepreneurs to enter the market
- > DG 1.2 Strengthening higher value segments and simultaneously shifting the position on the market
- > DG 1.4 Digital transformation of the tourism industry and the development of smart destinations
- > DG 2.1 Tourism as a desirable and reputable employer, attracting more young people
- > DG 3.1 Strengthening (green) local value chains and projects between tourism and other industries that co-create experiences in tourism
- > DG 3.4 Improving the amenities and visual appearance, tourism infrastructure and cultural landscapes in destinations

Horizontal policy strategy and measures

The Slovenian tourism development strategy 2022–2028 establishes and promotes cross-sectoral and inter-ministerial cooperation and integration at all levels, thus contributing to the development and operation of the tourism industry. It also establishes institutionalised horizontal and vertical links between local, regional and national levels in tourism. To this end, institutionalised forms of networking are being established for the effective implementation of the tourism development strategy and the sustainable operation of the tourism system as a whole.

The financial policy is implemented through inter-ministerial and cross-sectoral cooperation in the planning, pooling and securing of existing and new additional sources of funding for individual measures. The financial framework for the Strategy's delivery is based on targeted and highly focused financing activities and financial incentives, which are to be in line with the Strategy's development goals and the implementation of the individual measures envisaged. The principles of pooling funding sources from different sectors are of utmost strategic importance for achieving common goals, including joint measures to meet the goals of several sectors. It is also important to involve private sources, such as businesses, destinations, associations, local authorities and tourist regions, to participate in the financing of individual measures for which incentives are provided.

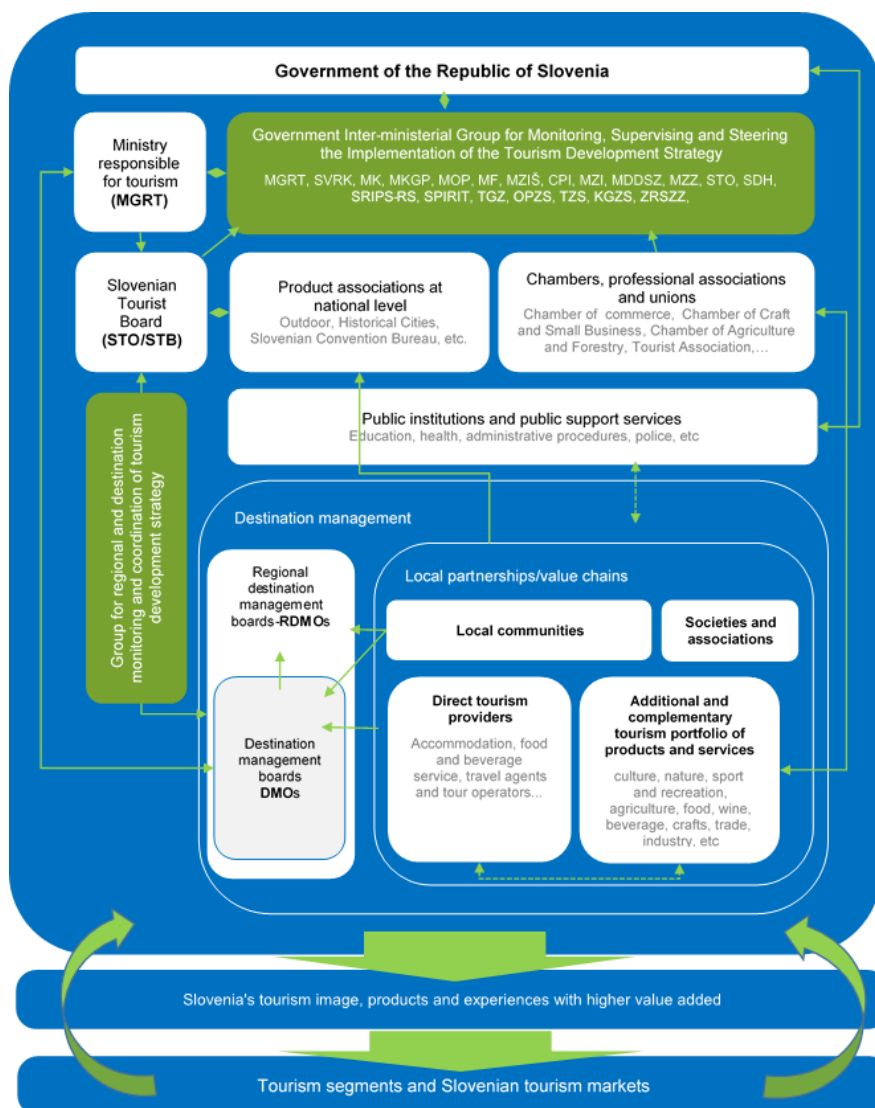
The measures relating to institutional framework, horizontal inter-ministerial management and policy coordination are associated with the following activities:

- a) Establishing the *Government Inter-Ministerial Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy* (hereinafter: the inter-ministerial monitoring, supervising and steering group) and the *Group for Regional and Destination Monitoring and*

Coordination of the Tourism Development Strategy as defined in Chapter 9.1 of this Strategy ("9.1 Organisational Framework for Monitoring the Strategy's implementation");

- b) Support for measures under Policy 6 *Destination management and tourism integration* and Policy 7 *Products and Marketing*, to provide conditions and activities for the organisation and management of tourist destinations and regions, and for the role of the Slovenian Tourist Board in the vertical integration of Slovenian tourism;
- c) Support for measures under Policy 1 *Investment and business environment* to promote cross-sectoral collaboration and create value chains in tourism and incentives for business activity projects indirectly linked to tourism;
- d) Support for measures under Policy 2 *Public infrastructure and tourism character* to promote active management and development of leading tourist destinations, and to promote the integrated management of Slovenia's landscapes and cultural and natural heritage;
- e) Inter-ministerial coordination in the planning and the provision of public sources of funding, within Slovenia's budget or EU funds to implement coordinated measures with inter-sectoral and inter-ministerial synergistic effects.

Figure 7: Institutional framework and inter-ministerial management of tourism at national and local levels to achieve higher value added



Vlada RS	Government of the Republic of Slovenia
MGRT	MGRT
STO	STB
Medresorska vladna skupina za spremljanje, nadzor in usmerjanje izvajanja strategije razvoja turizma MGRT, SVRK, MK, MKGP, MOP,	Government Inter-ministerial Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy MGRT, SVRK, MK, MKGP, MOP, MF, MZIŠ, CPI, MZI, MDDSZ, MZZ, STB, SDH, SRIPS-RS, SPIRIT, TGZ, OZPS, TZS, KGZS, ZRSZZ
Produktna združenja na nacionalni ravni Outdoor, ZZMS, KUS, ...	Product associations at national level Outdoor, ZZMS, KUS, etc.
Zbornice, stanovska združenja in zveze GZS, OZS, KGZS, TZS,...	Chambers, professional associations and unions GZS, OZS, KGZS, TZS, etc.
Javne ustanove in podporne javne storitve Šolstvo, zdravstvo, upravni postopki, policija,...	Public institutions and public support services Education, health, administrative procedures, police, etc.
Destinacijsko upravljanje	Destination management
Regijske Destinacijske organizacije – RDMO	Regional destination management boards – RDMB
Destinacijske management organizacije	Destination management boards – DMB
Lokalna partnerstva/verige vrednosti	Local partnerships/value chains
Lokalne skupnosti	Local communities
Društva in zveze	Societies and associations
Neposredni turistični ponudniki Gostinski nastanitveni obrati, strežba hrane in pijače, turistični agenti in organizatorji	Direct tourism providers Accommodation, food and beverage service, travel agents and tour operators
Dodatna in komplementarna turistična ponudba kultura, narava, šport in rekreacija, kmetijstvo, hrana, vino, pijača, obrt, trgovina, industrija, ...	Additional and complementary tourism portfolio of products and services culture, nature, sport and recreation, agriculture, food, wine, beverage, crafts, trade, industry, etc.
Turistična podoba, produkti in doživetja Slovenije z višjo dodano vrednostjo	Slovenia's tourism image, products and experiences with higher value added
Turistični segmenti in trgi slovenskega turizma	Tourism segments and Slovenian tourism markets

5. FINANCIAL ROADMAP FOR THE STRATEGY'S DELIVERY IN THE 2022–2028 PERIOD

5.1. Presentation of the indicative financial plan

The indicative financial plan of the Slovenian Tourism Strategy 2022–2028 foresees and estimates the funding of individual policies by specific sub-policies and measures from different sources of funding, which are divided into:

- a) existing public budgetary resources and EU funding already secured, planned or at an advanced stage of coordination at the time of the Strategy's adoption;
- b) an indicative estimate of the required additional public budgetary resources and EU funding, which should be made available over the entire strategic period in accordance with the options and decisions under the budget policy adopted by the Government and, depending on the nature of individual measures and to the extent that they fall within the scope of State aid, duly notified to the new State aid schemes in the EU;
- c) an indicative estimate of the participation of private companies, destination management boards, associations and local authorities in the implementation of individual measures;
- d) an indicative estimate of the credit sources of financing needed (SID Bank, development banks, commercial banks) for the implementation of individual measures;
- e) *an indicative estimate of the envisaged additional equity investments in the development, renovation and new construction of tourism infrastructure by private companies, entrepreneurs and farmers;*
- f) *an indicative estimate of the credit sources of financing needed (SID Bank, commercial banks) to make additional private investments in the development, renovation and new construction of tourism infrastructure.*

The planned and indicatively estimated funds by individual sources support and enable the implementation of the set strategic and development goals of the Slovenian Tourism Development Strategy by the end of the strategic period.

It is particularly crucial to financially support the recovery and robust sustainable momentum of Slovenian tourism in the planned strategic period, when, on the one hand, the tourism industry is facing the most severe consequences of the COVID-19 crisis and the new threatening security and political situation in Europe and the world, and, on the other hand, it is also confronted with long-lasting structural imbalances on the supply side and the need for the industry's qualitative and managerial restructuring.

The envisaged measures and the indicative financial plan for their implementation address the most important challenges facing Slovenian tourism and can bring about a significant shift in its performance, sustainability, digital transformation and, above all, higher value added for all stakeholders.

The total investment in all 94 measures to deliver the Strategy and achieve its strategic and development goals from all sources over the entire strategic period 2022–2028 is estimated to be: EUR 1.54 billion.

The estimated level and share of funding for the implementation of individual key strategic policies over the entire strategic period is shown in **Table 31 and Chart No. 77**.

The largest share, i.e. 55% or EUR 846 million of the total estimated sources of funding identified in the Strategy, is directed towards the policy of investments and the business environment in tourism, with 63% of private funding and 37% from various public resources of which 20% are already secured and 17% still need to be planned and ensured throughout the entire strategic period.

Of the total estimated investments for the entire strategic period, 30% or EUR 465 million is directed towards investments and development of public infrastructure and heritage to improve Slovenia's tourism character, of which 39% is expected to come as contributions from local authorities, destinations, private funds and private credit sources, and 61% is indicatively estimated to come from various sources of public funds (budget and EU funds) of which 23% has been already secured, and 38% is indicatively estimated to be planned and to be secured throughout the strategic period.

The total financial appraisal of the strategy envisages 6% or EUR 98.5 million for one of the key strategic policies, i.e. destination management and tourism integration, of which 24% has been already provided by public funds in the foreseen and planned programmes, 27% by the estimated contributions of destination management boards and local authorities, and 49% by the indicatively estimated share of public resources that still need to be made available over the entire strategic period for the implementation of all the measures envisaged.

The policy on accessibility and sustainable mobility in Slovenian tourism is estimated to require EUR 60 million, or 4% of the total financial plan, for the implementation of the envisaged policy measures. Of the total estimate, 34% are sources of contributions from local authorities, destinations and private companies, 2% are private credit sources, and 64% is an indicative estimate of the amount of additional public resources needed.

The Slovenian tourism product and marketing policy with the planned measures is estimated at 3% or EUR 44 million of the investment needed over the entire strategic period. Of this, 10% has been already planned and secured, 36% is the estimated contribution of private providers and destinations, and 54% is the estimated need to secure additional public funding.

The sustainability policy and The Green Schemes of Slovenian Tourism directly account for 1% or EUR 12.3 million of the total estimated envelope of the overall financial plan. Of this, 44% are sources of funding that have been already secured, 37% is the planned personal contribution of private providers and destinations and 19% is the estimated amount of additional public funds that are still to be provided. **For sustainability policy and green schemes, measures and concrete activities have also been foreseen under all other policies, as sustainability is a key vision for Slovenian tourism and is therefore horizontally integrated in all policies.** As a result, the funds provided to focus on tourism sustainability are much higher than those foreseen in this vertical strategic policy alone.

The same applies to digitalisation as a horizontal policy, for which less than 1%, or EUR 2.1 million, of the funds are directly allocated to the digital transformation process of Slovenian tourism. **However, it should be noted that measures related to digital transformation as a horizontal policy are financially covered by a large number of measures under all strategic key policies** and thus the total funding for Slovenian tourism's digital transformation is in fact covered by a much larger share, as also indicated in the description of this horizontal policy.

Table 31: Estimated level of funding for tourism development by strategic policy

Source of funding/Policy <i>(amounts in -EUR 000)</i>	POLICY 1: INVESTMENTS AND BUSINESS ENVIRONMENT	POLICY 2: PUBLIC INFRASTRUCTURE AND NATURAL AND CULTURAL HERITAGE TO IMPROVE SLOVENIA'S TOURISM	POLICY 3: HUMAN RESOURCES FOR SUSTAINABLE GROWTH AND FOR INCREASING THE	POLICY 4: SUSTAINABILITY AND THE GREEN SCHEME OF SLOVENIAN TOURISM	POLICY 5: ACCESSIBILITY AND SUSTAINABLE MOBILITY	POLICY 6: DESTINATION MANAGEMENT AND INTEGRATION OF TOURISM	POLICY 7: PRODUCTS AND MARKETING and 8: DIGITALISATION	TOTAL – ALL POLICIES

Existing, already foreseen and secured public resources	170,240	105,823	16,550	5,450		21,180	4,500	323,744
Indicative estimate of additional public sources of funding needed	148,525	174,450	6,105	2,305	38,300	43,940	25,700	439,325
Estimated participation from private sources (local authorities, destinations, etc.)	285,665	154,211	3,000	4,497	20,682	24,405	15,492	507,954
Estimate of projected development and private credit sources	241,741	30,000			1,000			272,741
TOTAL VALUE / IMPACT - All sources	846,172	464,484	25,655	12,252	59,982	89,525	45,692	1,543,764

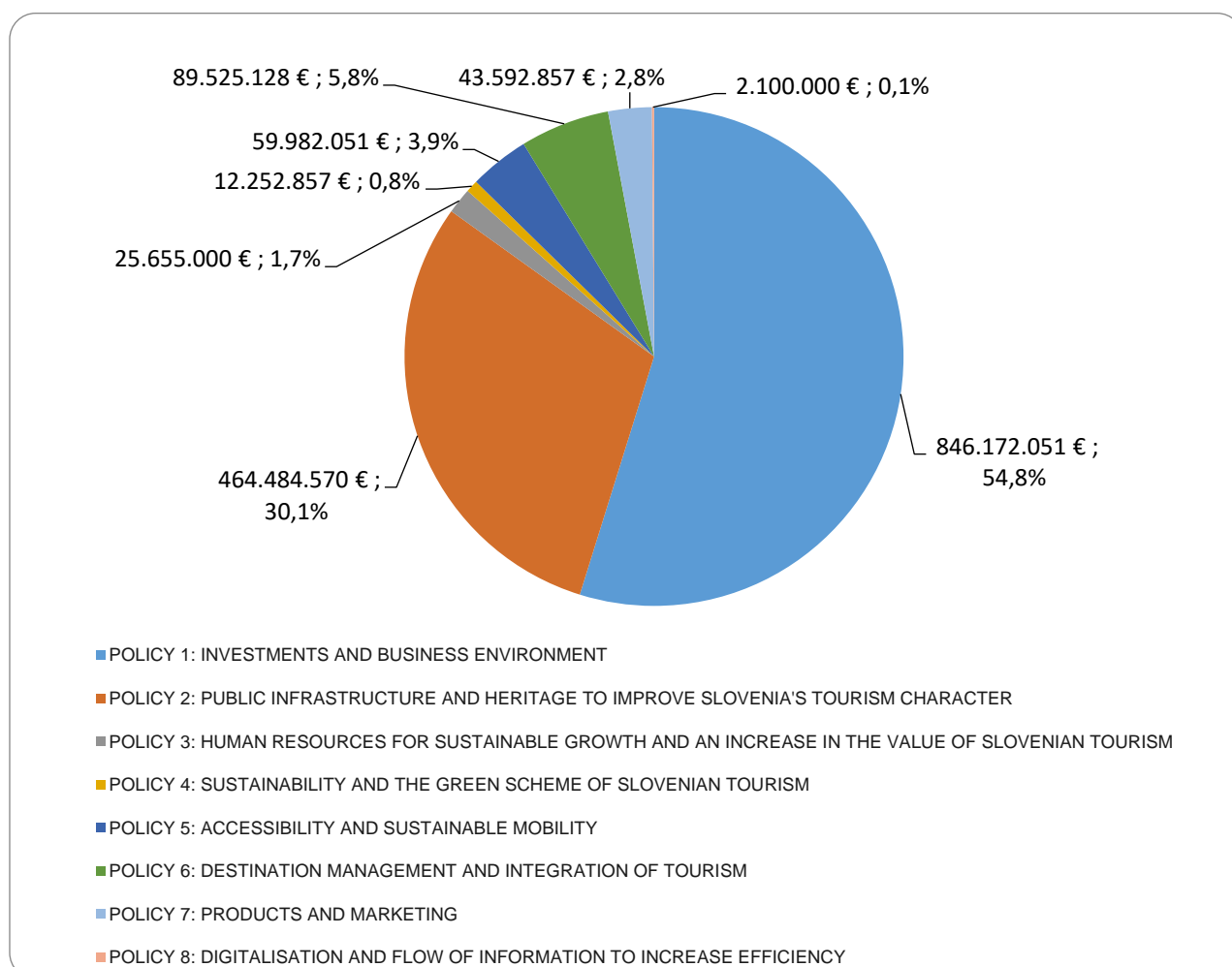
The total amount of funding for all 94 measures foreseen under 23 sub-policies (sectors), 7 key policies and one horizontal policy is estimated at EUR 1.544 billion of development investments over the entire 2022–2028 strategic period. Of this amount, 21% of the funds have been already secured or are at an advanced stage of coordination within EU public funds and planned State budget funds across the different ministries. As much as 28% is an indicative estimate of additional funding required from EU public and inter-ministerial budgetary resources. 33% is envisaged to be provided from the participation of private companies, destinations and local communities, while the remaining 18% is estimated as necessary funding from credit sources provided by SID Bank, development and commercial banks. The funds thus estimated are foreseen for the implementation of the measures envisaged under all strategic policies.

Taking into account the additional private investments in tourism investment projects, which are estimated according to the definitions under "**Scenario 3 – A little bit more and a lot better**" (the difference to the envisaged volume of private investments under this scenario, which is not included in the above amounts directly covered by the measures), the estimated effects of development investments to achieve the strategic goals over the entire strategic period amount to an additional EUR 743 million. These investments are estimated as a market-driven consequence of the Strategy's implementation's measures and are indirectly linked to its implementation. Together with these additional private investments, the total **estimated and projected volume of development investments in tourism over the entire strategic period amounts to EUR 2.3 billion**, of which the estimated private investments, personal shares and private credit sources account for 67%, while indicatively estimated public funds from EU funding sources, the state budget, etc. account for 33% of the total investments. Such a structure of planned investments also meets and addresses the most important challenges confronting Slovenian tourism on the supply side, eliminates structural weaknesses, contributes to the recovery of tourism after the crisis period and significantly increases the value added in the entire chain of the various activities and areas of Slovenia's tourism portfolio.

Table 32: Estimated level of funding for tourism development, including remaining private investments (estimate of the total investment cycle of Slovenian tourism in the 2022–2028 strategic period)

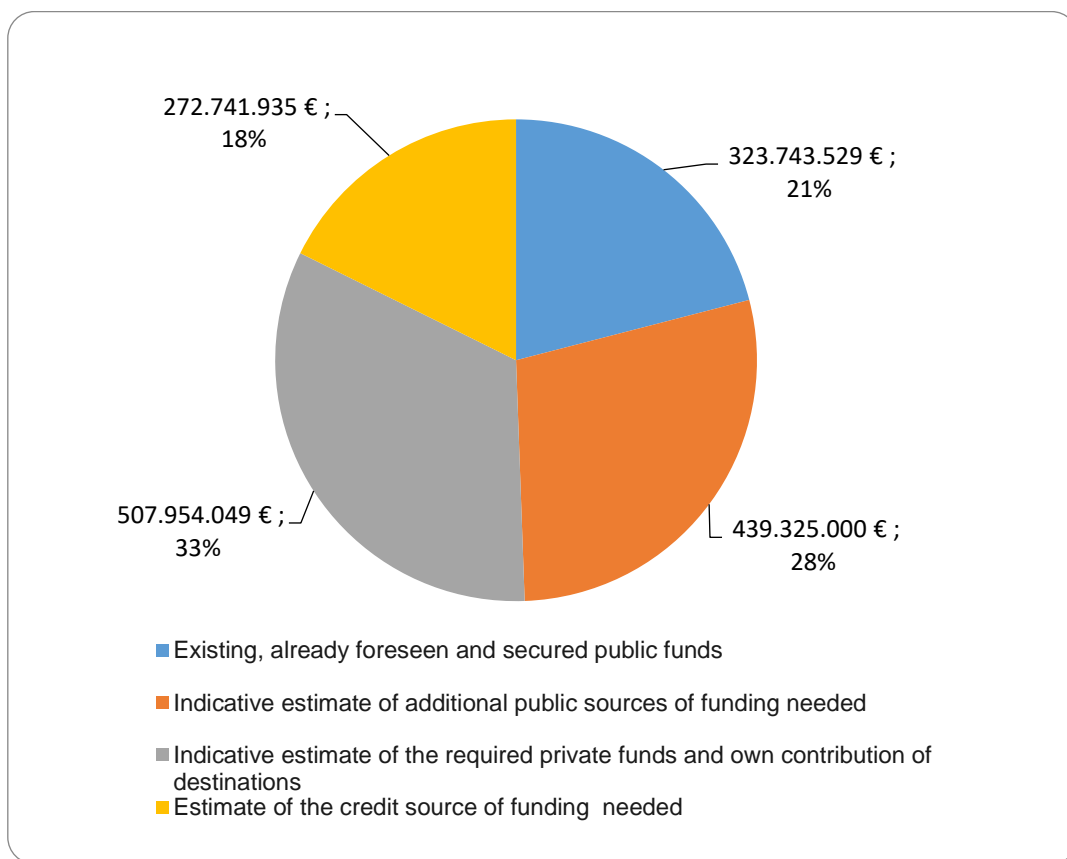
Source of funding for development investments	Estimated value:	Share
Existing, already foreseen and secured public funding or resources at an advanced stage of coordination at the national level, including EU financial resources	323,743,529 EUR	14%
Indicative estimate of additional public funding needed at the EU and national levels	439,325,000 EUR	19%
Estimated contribution from private sources (local authorities, destinations, etc.)	842,202,835 EUR	37%
Estimate of projected development and private credit sources	681,268,230 EUR	30%
TOTAL ESTIMATED VALUE OF DEVELOPMENT INVESTMENTS	2,286,539,594 EUR	100%

Graph 77: The level and share of funding per key policy of the Slovenian Tourism Strategy 2022–2028

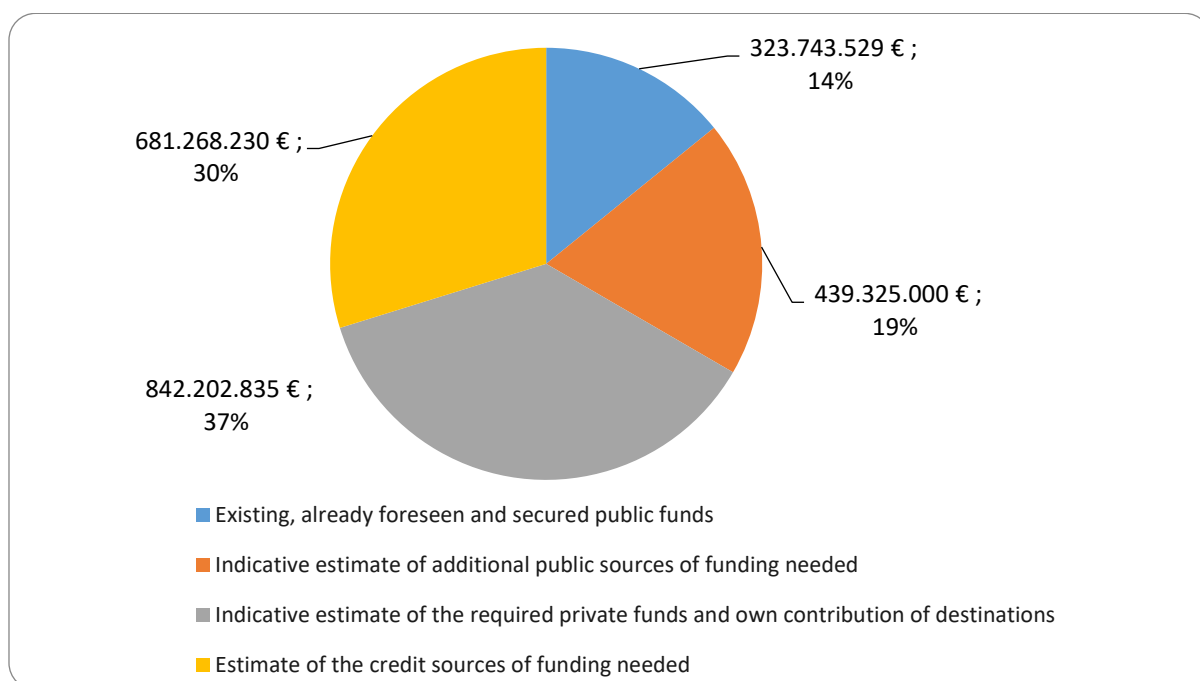


The total projected level of funding to implement all the measures foreseen throughout the 2022–2028 strategic period envisages the following structure of funding sources:

Graph 78: The estimated level and share of funding sources for all measures in the action plan of the Slovenian Tourism Strategy 2022–2028



Graph 79: The level and share of the estimated funding for tourism development, including remaining private investments



5.2. Harmonisation of funding sources with the new Financial Perspective, the RRF, and inter-ministerial synergies between funding measures

The sources of funding the measures, insofar as they relate to existing and secured public funding, are harmonised with the EU funding sources or the EU funding sources in the drafting phase and also still in the coordination phase – such as the Recovery and Resilience Fund (RRF), EU REACT, EU LEADER, EU Cohesion Fund – as well as with existing already planned budgetary resources. Indicative estimates of the planned public sources of funding, which have not yet been secured, refer to the state budget or additional dedicated EU funding sources over the entire strategic period.

Due to the highly inter-ministerial orientation of policies and the envisaged integrated and holistic way of managing tourism development, a large part of the measures foresee inter-ministerial funding of the measures from various instruments and sources of funding in accordance with the budgetary policy of the Government and the policies of individual ministries. The ministries crucial for establishing links to achieve synergies in funding individual measures or in integrating the measures of various ministries, are, in addition the Ministry of Economic Development and Technology – the ministry responsible for tourism, in particular the Ministry of Agriculture, Forestry and Food, the Ministry of Culture, the Ministry of the Environment and Spatial Planning and the Ministry of Infrastructure.

With a view to increasing the measures' effectiveness, the financial plan also provides an estimate for the provision of personal shares and co-funding by private companies, entrepreneurs, destination management boards, associations and local communities.

As an additional source of funding, a part of the funding from the credit sources of SID Bank and development or commercial banks is also planned for individual measures, where foreseen and reasonable, and also in order to ensure the principle of expert bank appraisal and confirmation of the economic viability of the projects.

Budgetary resources of development funding and EU sources of funding, which are directly or indirectly related to tourism development, are planned in accordance with the competencies and policies of the respective ministries and in line with the Government's budget policy. The coordination of measures of the individual ministries engaged in tourism and the delivery of the tourism development strategy by the envisaged "Government Inter-Ministerial Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy" as defined in Chapter 9, falls within the competence of the ministry responsible for tourism, which also submits the proposal for approval and reports to the Government.

Based on the Slovenian Tourism Strategy 2022–2028, the set policy orientations, sub-policies and measures, the ministry responsible for tourism draws up a detailed proposal for an action plan for the entire 2022–2028 strategic period, which is coordinated by the inter-ministerial monitoring, supervising and steering group referred to in Chapter 9. In line with the financial plan, the ministry approves the action plan for each budget period until the end of the strategic period.

6. EVALUATION, MONITORING AND ORGANISING THE STRATEGY'S IMPLEMENTATION

6.1. Organisational framework for monitoring the Strategy's implementation

In order to monitor the Strategy's implementation, an organisational framework is being put in place to ensure continuity or a smooth transition between the groups preparing for the Strategy's implementation and the authorities responsible for its implementation in the form of a permanent horizontal inter-ministerial body tasked with monitoring, supervising and steering the implementation and effects of the Slovenian Tourism Development Strategy and with vertical coordination at destination, local and regional levels.

Groups

Government Inter-Ministerial Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy

The members of the inter-ministerial umbrella group are representatives of individual ministries, public services and agencies at the national level, which are directly or indirectly related to ensuring the conditions for the development of tourism and have also been included in the Project Monitoring and Steering Group tasked with the drafting of the strategic document, as well as representatives of the chambers of commerce, business and professional chambers engaged in the tourism industry at the national level. The Government Inter-Ministerial Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy (hereinafter: The Inter-Ministerial Group for Tourism) is appointed by the Government upon approval of the 2022-2028 Strategy for the Sustainable Growth of Slovenian Tourism. It is managed, coordinated and administratively supervised by the Ministry of Economic Development and Technology. The minister responsible for tourism is the head of the Inter-Ministerial Group for Tourism.

Table 34: List of representatives of the Inter-Ministerial Government Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy (abbreviated as The Inter-Ministerial Group for Tourism)

#	Ministry or organisation	Number of members	Functions of members
1	The Ministry of Economic Development and Technology (MGRT), including Government Office for Development and European Cohesion Policy (GODECP) (the Ministry is tasked with the coordination and provision of administrative support for the operation of the group)	3	Minister
			State Secretary
			Director of the Directorate
2	Ministry of Agriculture, Forestry and Food (MKGP)	2	State Secretary
			Director of the Directorate
3	Ministry of Culture (MK)	2	State Secretary
			Director of the Directorate
4		2	State Secretary

	Ministry of the Environment and Spatial Planning (hereinafter: MOP)		<i>Director of the Directorate</i>
5	Ministry of Science, Education and Sport (MZiŠ)	2	<i>State Secretary</i>
			<i>Director of the Directorate</i>
6	Ministry of Infrastructure	2	<i>State Secretary</i>
			<i>Director of the Directorate</i>
7	Ministry of Labour, Family, Social Affairs and Equal Opportunities (MDDSZ)	2	<i>State Secretary</i>
			<i>Director of the Directorate</i>
8	Ministry of Finance (MF)	2	<i>State Secretary</i>
			<i>Director of the Directorate</i>
9	Ministry of Foreign Affairs (MZZ)	2	<i>State Secretary</i>
			<i>Director of the Directorate</i>
10	The Ministry of Health (MZ)	2	<i>State Secretary</i>
			<i>Director of the Directorate</i>
11	Slovenian Tourist Board (STB)	2	Director
			Adviser
12	Slovenian Sovereign Holding (SSH)	2	Management Board Member
			Technical Director
13	Institute of the Republic of Slovenia for Vocational Education and Training (CPI)	1	Director
14	Public Scholarship, Development, Disability and Maintenance Fund of the Republic of Slovenia (SRIPS-RS)	1	Director
15	SPIRIT – Slovenian Public Agency for Entrepreneurship, Internationalization, Foreign Investments and Technology	1	Director
16	Tourism and Hospitality Chamber of Slovenia	1	President
17	Chamber of Craft and Small Business of Slovenia	1	President
18	Tourist Association of Slovenia	1	President
19	Chamber of Agriculture and Forestry of Slovenia	1	President
20	Employment Service of Slovenia	1	Director
Σ	TOTAL NUMBER OF MEMBERS OF THE INTER-MINISTERIAL GROUP:	20/32	All members

Group for Regional and Destination Monitoring and Coordination of the Tourism Development Strategy

With a view to effectively implementing the strategic policies and measures at the local level, **vertical coordination will be put in place between the national level (inter-ministerial umbrella group) and regional and local destination stakeholders** in order to achieve synergies and greater effects in the management of the Strategy's delivery. To this end, the Group for Regional and Destination Monitoring and Coordination of the Tourism Development Strategy will be set up.

The Slovenian Tourist Board (STB) appoints representatives to the Group for Regional and Destination Monitoring and Coordination of the Tourism Development Strategy on the proposal of destination management and regional tourist boards (DTB) in such a way as to ensure equal and balanced representation of all regions and areas of Slovenian tourism.

In the initial and transitional period, the group consists of one representative of each leading tourist destination and one representative of each regional DMB, insofar as the regional DMBs are formed in accordance with the principles and requirements specified in this Strategy, as well as of a representative

of the organisation responsible for nature conservation and a representative of the operators of protected areas. The group is composed of a maximum of 40 members. After the establishment of the regional tourist areas and in accordance with the principles and requirements driving this Strategy, three representatives of each tourist region are appointed to the group, representing all destinations and local communities in their region through their participating in the group. In this group, representatives of the leading tourist destinations/regions represent not only the views of their own tourist boards but also the coordinated opinion and views of all stakeholders in their area (local communities, economic operators and public institutions, tourism providers, as well as the interests of the population). This principle is to be taken into consideration by the Slovenian Tourist Board when providing information to the DMBs and regional DMBs at the local level and when drafting the proposal for the appointment of the group's members.

The regional and destination monitoring group is appointed by the Slovenian Tourist Board no later than three months after the approval of the Slovenian Tourism Strategy 2022-2028. The group is managed, coordinated and administratively supervised by the Slovenian Tourist Board. The Head of the Group for Regional and Destination Monitoring and Coordination of the Tourism Development Strategy is the Director of the Slovenian Tourist Board.

Other working groups

Within each tourism policy, other organisational forms of cooperation and networking between ministries and stakeholders are proposed, where appropriate, for operational coordination and implementation of more complex measures. Ad hoc working groups of key actors and partners are set up as appropriate for the implementation of individual measures.

Coordinator for the Strategy's implementation and monitoring

The ministry responsible for tourism appoints a coordinator of the 2022-2028 Strategy for the Sustainable Growth of Slovenian Tourism for the operational implementation and monitoring of the Strategy's delivery.

Approval, management and implementation of the Strategy

In accordance with Article 5 of the Promotion of Tourism Development Act (ZSRT-1), the Slovenian Tourism Strategy is to be adopted by the Government on the proposal of the minister responsible for tourism. In accordance with the aforementioned Act (ZSRT-1), the Slovenian Tourism Strategy is the basic planning document for tourism development at the national level. The Strategy defines the implementation of the common strategic goals of all stakeholders concerned with tourism development, the basic measures taken by the Government to promote the development of tourism in the planned period and an assessment of the financial implications of the measures envisaged.

The Ministry of Economic Development and Technology has drafted a proposal for the Slovenian tourism development strategy in cooperation with expert contractors and in close coordination with three stakeholder groups:

- > Inter-Ministerial Group, national organisation, chambers and associations to oversee and steer the project;
- > Consultative Group on Destination Management; and
- > Consultative Group on the Economy and Entrepreneurship.

In order to design and harmonise tourism development goals, policies and actions, a broad public debate with stakeholders in tourism was also held in the first quarter of 2022, with over 150 face-to-face interviews with stakeholders in each tourism sector. An online survey involving 512 respondents from all levels and tourism industry sectors was also conducted.

The Strategy's final version, which was coordinated across ministries, has also been presented through four special workshops across four macro destinations of Slovenia for the widest range of stakeholders, i.e. in Alpine Slovenia, Mediterranean Slovenia, Thermal Pannonian Slovenia and Central Slovenia with Ljubljana.

After the Strategy's approval by the Government, the coordination, supervision and steering of the Strategy's delivery will be taken over by the Ministry of Economic Development and Technology, together with the Inter-Ministerial Group for Tourism and the group for regional and destination monitoring of the Strategy's delivery. The ministry responsible for tourism, together with other ministries and national institutions and agencies, will coordinate and harmonise, to the maximum extent possible, the policies and measures envisaged in the various areas. This will lead to the achievement of the strategic and development goals set out in the Strategy.

6.2. Key indicators for monitoring and evaluating the Strategy's delivery, the state of play, and the dynamics of tourism development

In accordance with the set goals, policies and measures for the development of tourism, performance indicators have been selected to monitor and evaluate the effectiveness of the implementation of the Slovenian Tourism Strategy 2022–2028.

Table 35 on the next page shows the key measurable **impact indicators** of the five strategic goals set in the Strategy. The basis for determining the target value of the 2028 indicators is the projection for the development of Slovenian tourism under Scenario 3 – Scenario of moderate quantitative growth with a focus on increasing quality and value added ("A little bit more and a lot better"), as defined in Chapter 4.1.3. For individual impact indicators, data sources are listed that are either already available as an existing indicator for a particular source, or need to be calculated and compiled from multiple data sources and the corresponding calculation. The obligations to monitor data and indicators, and communicate them to individual stakeholders and the public are agreed and determined by the ministry responsible for tourism in cooperation within the Inter-Ministerial Group for Tourism referred to in Chapter 9.1.

Direct output indicators for individual policy measures are determined in the Strategy's action plan.

In addition, a set of **other analytical indicators** that are relevant for the continuous monitoring of the development level of Slovenian tourism and trends is to be compiled by the Slovenian Tourist Board in cooperation with the Statistical Office of the Republic of Slovenia (SURS) and other public institutions and institutes responsible for collecting and processing data and maintaining databases directly or indirectly related to tourism, as part of the measure of setting up the National Market Intelligence Hub (NMIH) for Slovenian tourism.

The monitoring of indicators is a key tool for adapting the Strategy's measures to the circumstances and for decision-making by Slovenian tourism stakeholders. All the aforementioned indicators also form the basis for the creation of analytical digital dashboard within National Market Intelligence Hub (NMIH).

Table 35: Indicators for monitoring the achievement of strategic goals at the national level (impact indicators)

Ind. No.	Impact indicators	Unit	Source	Basis 2019	Goal 2028	I 2028/2019
SG1	Quality, value and year-round supply of the tourism portfolio of products and services (Business and financial aspect)					
I 1.1	Value added					
	Total value added in the core tourism industry (SKD I Hospitality Industry and R92.001 Activities of casinos)	EUR	AJPES, 2019	916,142,394	1,312,343,163	143
	Value added per employee in the core tourism industry (SKD I Hospitality Industry and R92.001 Activities of casinos)	EUR/employee	AJPES, 2019	29,313	38,429	131
	Value added per employee in the hospitality and accommodation sector (SKD I55)	EUR/employee	AJPES, 2019	36,326	59,618	164
	Average value added per employee in all tourism-related sectors	EUR/employee	AJPES, 2019	29,317	39,196	134
I 1.2	Receipts from the export of travel:	billion, EUR	Bank of Slovenia, 2019	2.8	3.9	139
	Receipts from the export of travel per tourist overnight stay	EUR/ overnight stays by foreign tourists	Bank of Slovenia, SURS, 2019	242	331	137
I 1.3	Seasonality ratio					
	GINI seasonality index	Index value	SURS, 2019 Calculation	0.27	0.23	85
I 1.4	Length of stay of tourists					
	Average length of stay of all tourists	Number of overnight stays	SURS, 2019	2.5	3.0*	120*
SG2	SATISFACTION OF THE POPULATION, EMPLOYEES AND GUESTS (Societal aspect)					
I 2.1	Satisfaction of the population					
	Average satisfaction of the population with the development of tourism in the destinations included in the GSST	Average score ranging from 1 (disagree) to 5 (I strongly agree)	GSST, 2021, N = 12 destinations, 2375 responses	3.6	4.3	120
I 2.2	Satisfaction of guests					
	The opinion of foreign tourists about the quality of and their satisfaction with individual elements of the tourism portfolio by type of tourist sites; average score of the overall impression of all sites	Average score ranging from 1 (very bad) to 5 (very good)	SURS survey, 2019	4.54	4.6	101
I 2.3	Satisfaction of employees					
	Average gross earnings in the tourism industry (SKD I Hospitality)	EUR	SURS, 2019	1,321	1,783	135

Ind. No.	Impact indicators	Unit	Source	Basis 2019	Goal 2028	I 2028/2019
SG3	Positioning tourism as a generator of value in other industries and sustainable development (Economic aspect)					
I3.1	Contribution of tourism and tourism-related industries to Slovenia's GDP	Share	AJPES, 2019	6.5%	7.5%	115
I3.2	Jobs					
	Employees in the core tourism industry (SKD I) and gambling (SKD R92.001)	Number	AJPES, 2019	22,036	23,772	108
	Jobs generated by tourism demand (direct or indirect tourist consumption)	Number	AJPES, 2019	44,730	53,266	119
SG4	Decarbonisation and rebalancing of Slovenian tourism (Environmental and climate aspect)					
I4.1	Carbon footprint					
	Total carbon footprint (the amount of GHG emissions) generated from the total industry (direct or indirect tourist consumption)/year	in kt CO2eq	Different sources, calculation	1,255	1,242	99
	Total carbon footprint generated from accommodation (I 55) per overnight stay	in kg CO2eq/overnight stay	Different sources, calculation	39.9	30.3	76
	Number of certified providers — ecolabels	Slovenia Green certified providers	STB	160	600	375
I4.2	Density and intensity of the tourism industry in Slovenia					
	Number of all types of beds/100 inhabitants		SURS, 2019 Calculation	8.2	8.4	102
	Number of overnight stays of all tourists/day/km2		SURS, 2019 Calculation	2.1	2.31	110
	Number of overnight stays of all tourists/day/100 inhabitants		SURS, 2019, Calculation	2.1	2.25	108
SG5	Competent and effective management structures (Management aspect)					
I5.1	Quality performance of destination management boards					
	Amount of the tourist tax collected (revenue of local communities)	EUR	Municipalities, Calc.	23,000,000	28,000,000	122
	Budgets of all destination management boards (DMB)	EUR	Survey 2019	30,000,000	45,000,000	150
I5.2	Quality of tourism development management at the national level					
	Factor of the value added generated from the tourism industry on the Slovenian Tourist Board's budget (key indicator per sector, SKD: I55 Accommodation)	Factor	AJPES, STB Budget	25	27	108
	Total payments to the state budget and treasuries from tourism in the year	EUR	FURS, calculation	590,452,353	879,441,046	149
I5.3	Quality of management at business level					
	Operating revenue per realised overnight stay in the sector as a whole I55	EUR	AJPES;FURS, calculation	44	72	164
	Average occupancy of all types of accommodation (units/rooms) in the year	Share	SURS, 2019	35%	39%	111

* Account has also been taken of touring across Slovenia, which is not captured with the existing statistical measurement methodology.

6.3. Definition of key monitoring and reporting milestones

The achievement of the indicators for strategic goals and measures, and progress made in the implementation of the measures set out in The 2022–2028 Strategy for the Sustainable Growth of Slovenian Tourism are to be monitored and reported in the ways and at the intervals listed below:

- > by regular quarterly, semi-annual and annual monitoring of the implementation of the measures set out in The 2022–2028 Strategy for the Sustainable Growth of Slovenian Tourism with a preliminary designed tool for the unified monitoring of the Action Plan, and by the appropriate reporting of the key actors to the supporting information system;
- > by regular annual monitoring of the performance indicators for The 2022–2028 Strategy for the Sustainable Growth of Slovenian Tourism (with a relevant reference to the monitoring of analytical indicators), and by reporting accordingly;
- > by simultaneous monitoring of the analytical indicators for Slovenian tourism (a digital application "dash board" for monitoring indicators is gradually being developed by the Slovenian Tourist Board and the Ministry of Economic Development and Technology as part of the National Market Intelligence Hub) – with a reference to the indicative set of analytical indicators, which are also annexed to this Strategy;
- > by regular semi-annual and annual reporting on the implementation and coordination of policies and measures and on the achievement of the Strategy's performance indicators and key analytical indicators for the development of Slovenian tourism to the Inter-Ministerial Group for Tourism, which forms its opinion and recommendations;
- > by regular annual coordination and reporting on the implementation of policies and measures and on the achievement of Strategy's performance indicators and key analytical indicators for the development of Slovenian tourism to the Group for Regional and Destination Monitoring and Coordination of the Tourism Development Strategy, which forms its opinion and recommendations.
- > Once a year, on the proposal of the minister responsible for tourism and with the prior opinion and recommendations of the Inter-Ministerial Group for Tourism, the Government considers information and/or an annual report on the implementation of Strategy's policies and measures and on the achievement of performance indicators;
- > by publishing an annual report on the Strategy's implementation's policies and measures and on the achievement of performance indicators;
- > by presenting the annual report to tourism stakeholders, the media and the public at the annual Days of Slovenian Tourism.

6.4. Definition of milestones for evaluation

With a view to ensuring as efficient, effective and comprehensive implementation as possible and timely action through adjustments of policies and measures to unforeseen circumstances, at least one interim evaluation has been envisaged, as well as a comprehensive final expert and objective evaluation of the effectiveness of the implementation of The 2022–2028 Strategy for the Sustainable Growth of Slovenian Tourism.

- > **The interim evaluation of the implementation of the policies and measures and of the achievement of the Strategy's goals** is carried out by expert contractors and includes an assessment of the effectiveness and efficiency of key policies and measures in tourism, their coherence, and the interim review of the achievement of strategic and development goals, the achievement of performance indicators, and recommendations and orientations for action for the remainder of the strategic period. The interim evaluation takes place after the strategic period's halfway point (i.e. in the first half of 2025).
- > **The comprehensive final expert evaluation of the Strategy's implementation and the achievement of the strategic and development goals of the Slovenian tourism development strategy.** Before the end of the strategic period in 2028 and prior to the beginning of the next strategic period, the ministry responsible for tourism, together with an external expert contractor, makes a final,

comprehensive and objective evaluation of the state of play in Slovenian tourism, of the Strategy's implementation and of the achievement of the goals and performance indicators for tourism development in the strategic period. The report of the comprehensive final evaluation is considered by the Inter-Ministerial Group for Tourism and the Government. Based on the final evaluation report, guidelines and recommendations are adopted for the drafting of a tourism development strategy for the next period (i.e. in 2028).

6.5. Proposal to digitalise the monitoring of measures and indicators

In accordance with the Slovenian Tourism Digital Transformation Strategy, the establishment of the National Market Intelligence Hub (NMIH) will be crucial for the comprehensive monitoring and evaluation of the state of play, development and progress of Slovenian tourism and of the effectiveness of the tourism development strategy by individual sections, target areas and levels. For effective monitoring, it is necessary to ensure automated collection, regular analysis and systematic and in-depth evaluation of standardised data and derived tourism indicators. Much of the data relevant for monitoring already exist, but are scattered across several sources (SURSTAT, AJPE, ARSO, DARS). In order to support the evaluation of the effectiveness of individual measures, plans, and strategies at different levels, to ensure more accurate prioritisation and to optimise the data-driven allocation of resources, we should carry out continuous, ongoing and periodic analysis and evaluations. A comprehensive system of key performance indicators (KPI) provides the basis for the planning of current and follow-up activities of ministries, national organisations (STB, SPIRIT, other public agencies) and associations (chambers, product associations), municipalities/destinations and private and public tourism providers to guide development policies, operating conditions, and the operation of the tourism industry. The digitalised and widely accessible support and information on the movement of the KPIs provide assistance to all Slovenian tourism stakeholders in continuously providing and improving the quality of public and private tourism services (active monitoring of KPIs, possibility of forecasting tourism trends, active involvement of service providers, exchange of experiences and continuous benchmarking, incentive for collaborative support, etc.). Moreover, an open and widely accessible source of information, with the KPIs within the envisaged National Market Intelligence Hub, ensures greater transparency, accessibility and the comparison of data, and a significant improvement in providing information on the tourism portfolio of products and services to all stakeholders and tourists, while at the same time ensuring the stable long-term monitoring of data and tourism indicators in Slovenia for more appropriate action at all levels.

The National Market Intelligence Hub has envisaged a cloud infrastructure and a data warehouse linking local, systemic and global data via API intermediaries. To monitor the implementation of the measures and indicators of the national strategy, it will be necessary to develop a user interface for entering (measurable) targets, measures and indicators, or a set of individual indicators consistent with the overall indicator system, into the data warehouse, as well as a tool to evaluate the data and process the indicators, as foreseen in the National Market Intelligence Hub, in accordance with the communication standards. In this context, it will have to be taken into account that objectives, measures and standardised indicators can also be entered in the same way, including with regard to destination tourism strategies, individual measures, calls for tenders or projects.

To maximise the tool's usability, it will also be important to have a user-friendly functionality to display data and indicators, and, consequently, the effectiveness of strategies, actions, plans, tenders and projects in an interactive dashboard as part of the National Market Intelligence Hub. It will be necessary to provide powerful, understandable and user-friendly visualisations and interpretations of data/indicators with the appropriate support of the Economic Interest Grouping (EIG), the possibility of filtering and comparing data by sectors and levels of tourism activity, location (municipalities, destinations, country) or by goals, measures, publications and exports of data/indicators, tables, reports, in accordance with the editorial policy. It will also be important to establish the cross-sectoral integration of indicators. The proposal is to phase in the user interface for the selected policy in parallel with the development of the National Market Intelligence Hub.

The integrity of the Slovenian Tourism Strategy 2022–2028, the large number of measures and their key actors from different line ministries, the limited human and financial resources, the need for effective management, the

provision of timely information for decision-making, the adaptation of tourism policy measures to changing circumstances – all of which makes it essential to establish digital tools to support the monitoring of the Strategy.

To this end, the following should be done:

Within the first six-month period after the Strategy's adoption, a digital tool should be set up to monitor the implementation of the measures or action plan, and the key actors should report online on the progress made in implementing the measure and in achieving their result indicators. Within the first year after the Strategy's adoption, a digital tool to support the monitoring of analytical indicators ("dashboard") should be set up for the overall monitoring of Slovenian tourism's development (see indicative set of indicators in Annex 3), which also includes indicators for the strategic goals of this Strategy (impact indicators referred to in Table 32).

The stated digital tools should be integrated meaningfully into the National Market Intelligence Hub platform.

7. FINAL RECOMMENDATIONS FOR THE STRATEGY'S SUCCESSFUL DELIVERY

7.1. Recommendations on the organisational principles for successful achievement of the Strategy's goals

The organisation of the Strategy's implementation, its monitoring in terms of the achievement of target indicators and the supervision of its implementation, is crucial for the effective achievement of the strategic and development goals.

Furthermore, the appointment of a permanent horizontal inter-ministerial body to monitor, supervise and steer the implementation and effects of the Slovenian tourism development strategy, and the establishment of vertical coordination with the destination, local and regional levels, as proposed in Chapter 9 of this document, are of utmost importance for the achievement of the goals of the Strategy, in view of the following:

- > The inter-ministerial nature of the tourism industry;
- > The Strategy's sub-policies and measures are developed on the basis of inter-ministerial cooperation, with the aim of achieving strong synergies;
- > The sources of funding for the implementation of the measures are planned by several ministries and are also linked and built upon each other;
- > The partnerships and sources of funding envisaged in the Strategy link the local, regional (destination) and national levels of the tourism industry, and it is therefore necessary to set up an appropriate coordination and harmonisation body in this vertical link as well.

A key recommendation calls for the adoption of an inter-ministerial approach to monitoring, coordinating and managing the Strategy by key relevant ministries and stakeholders at the national level, coordinated by the ministry responsible for tourism, and for reporting to the Government on the Strategy's progress and results once a year.

7.2. Key priorities and steps towards the Strategy's successful delivery

The strategic period into which Slovenian tourism is entering with this Strategy is extremely challenging, as it is essentially framed by newly emerging and extraordinary global developments and risks. In addition to the major structural challenges identified, such as the tourism portfolio of products and services lagging behind in the delivery of the green promise, low value added of the industry, the provision of human resources, the Strategy's success is highly dependent on adapting to external factors – the unpredictable development of the COVID-19 pandemic, the security situation in Europe, migration flows, macroeconomic stability, climate change and risks.

In this respect, the Action Plan identifies four priority levels of measures to be implemented on a policy-by-policy basis:

1. **E = emergency measure** (a short-term emergency measure to speed up the industry's recovery after the pandemic, to adapt to the unstable security situation in Europe, and to address the pressing challenges of the industry's core business);
2. **I = key measure** (a strategically important measure to achieve the Strategy's strategic and development goals and the planned structural changes);
3. **II = significant measure** (a measure with a specific impact on the achievement of the Strategy's strategic goals and the planned structural changes);

4. **III = less significant measure** (a measure that does not have any decisive impact on the achievement of the strategic goals or whose impact is limited to a narrow segment of the industry).

For the Strategy to be successful, it is crucial that bodies responsible for measures prioritise the development and implementation of emergency and key measures (setting priority for measure E and measure I in the action plan).

Emergency measures to be taken as a matter of urgency as soon as the Strategy is adopted include:

- > Short-term provision of staff for the industry (3.1.1, 3.1.2, 3.1.5, 3.2.3, 3.3.1);
- > Measures to put the green transition into practice: Increasing the penetration of green business models in the economy (4.2.6), Promoting the establishment of high-speed public transport connections during peak season (5.3.3);
- > Emergency interventions at the destination level, the GSST and systematic monitoring of the state of play in the industry: Harmonising the content of destination management boards' work with the needs of current tourism development and the Strategy's priorities (6.1.1); Including destination management boards in the Promotion of Tourism Development Act (ZSRT-1); Ensuring stable sources of funding (6.3.1); Revising the concept of the Green Scheme for Slovenian Tourism at the national level (4.1.1, 4.1.3), Establishing a national system to measure, reduce and offset the carbon footprint of tourism (4.2.2); Establishing an integrated model for the evaluation of the state of play and dynamics of the tourism industry's development (1.1.5).

Key or strategically important measures to be taken in the first year after the Strategy's adoption include:

1. **Strengthening the tourism portfolio of products and services of Slovenian tourism:**
 - a. Co-financing and lending for business investments in accommodation, culinary and oenological options, and public and collective investments in tourism infrastructure and heritage (1.1.1, 1.1.2, 1.2.1, 1.2.3, 1.2.4, 2.1.1, 2.1.3, 2.2.3);
 - b. Developing and using models such as the model for the final consolidation of state-owned assets, the financing instrument for the development of historic town centres, and the model for the active management of tourism infrastructure in destinations (1.3.1, 2.1.3, 2.2.2);
 - c. Increasing the effectiveness of product management at the overarching level, including by strengthening the role, competencies and funding of product associations (7.1.1, 7.1.2);
 - d. Recovery and relaunch of tourism activities after the COVID-19 crisis and the negative impact of the escalating security and political situation (1.4.1);
2. **Providing competent human resources for the industry in the long term** (3.1.3, 3.2.1, 3.2.2);
3. **Promoting the green transition of Slovenian tourism towards a carbon-free society:**
 - a. Establishing the Green Scheme of Slovenian Tourism as a tool for developing sustainable tourism in businesses and destinations (4.1.2, 4.1.4, 4.2.1, 4.2.2, 4.2.3, 4.2.6);
 - b. Supporting Slovenia's accessibility as a green and low-carbon destination, adapting integrated public passenger transport to tourism and introducing new forms of mobility in destinations (5.1.1, 5.1.2, 5.2.2, 5.2.4, 5.3.2);
4. **Upgrading destination management** at national, regional and destination levels (6.1.2, 6.1.3, 6.1.4, all measures pertaining to sub-policies 6.2, 6.3.2, 6.4.4);
5. **Strengthening the stability, value added and sustainability of sales channels and markets**, adapting marketing communication and promotion to the new vision and goals of Slovenian tourism, targeting more demanding segments as a priority (7.1.1, 7.2.2, 7.3.2, 7.3.3, 7.3.4); Promoting direct booking channels and providing financial incentives for receptive and DMC agencies to target more demanding segments as a priority (7.2.2, 7.2.3, 7.2.5); Updating the overarching communication platform under the brand "I feel Slovenia" for foreign markets (7.3.4) Strengthening synergies through a co-marketing platform (7.3.3);
6. **Speeding up the digital transformation of Slovenian tourism** (Horizontal Policy 8);
7. **Improving the business environment** by administrative simplifications, exploring reasonable tax benefits, creating conditions to increase international competitiveness (1.4.2, 1.5.1, 2.2.6, 3.3.4).

7.3. Risks and their mitigation in the Strategy's implementation

Overall, there are four main risks that may jeopardise the successful implementation of a tourism strategy.

a) Limited access of stakeholders (buy-in)

Tourism and its development depend on the various activities of several independent stakeholders and it is therefore important to ensure the broadest possible cooperation and actual involvement of these stakeholders.

In order to avoid major inconsistencies in the Strategy's implementation, in particular as regards potentially controversial measures, it is essential to exercise continuous communication and cooperation with all relevant stakeholders.

b) Uncoordinated and unmonitored implementation of the Strategy

A key success factor for any strategy is proper coordination and monitoring of the implementation of the proposed measures. Progress in implementing the various measures, identified in the national tourism strategy, should be regularly monitored by the body (or bodies) responsible for implementing the strategy.

In order to mitigate this risk, the proposal for the Strategy's delivery suggests establishing *The Government Inter-Ministerial Group for Monitoring, Supervising and Steering the Implementation of the Tourism Development Strategy* to ensure the coordinated guidance and supervision of its implementation at a sufficiently high level and in a coordinated manner involving key stakeholders.

c) Insufficient funding of the envisaged policies and measures

Tourism development needs sufficient funding and it is therefore important to ensure that sufficient financial resources are available for the 2022–2028 period to implement the measures identified in the national tourism strategy.

The Slovenian Tourism Strategy 2022–2028 has put forward a sufficiently robust financing plan, made up of various sources of funding at the public EU, national and municipal levels, as well as of the resources of the tourism industry and associations. A key principle of the financing plan is to ensure that the planning, implementation and funding of measures are as inter-ministerially coordinated as possible and that resources are pooled in partnership to achieve synergies in the development impact of measures. The financing plan is partly based on resources already made available from long-term EU programmes and already planned budgetary allocations, partly as a proposal to secure additional public EU and national budgetary resources from various ministries, while a large part of the resources for the Strategy's implementation is planned on the basis of realistic estimates of private investment and partnership funds from the private sector, tourism associations and destinations at local, regional and national levels.

d) Occurrence of unexpected events

The COVID-19 pandemic has shown how tourism can be severely affected by an unexpected critical event. It is therefore inevitable to constantly monitor likely risk events that could have negative consequences for the Slovenian tourism industry, to quickly prepare emergency response plans and measures as needed, and also to draw up an assessment of the extent to which a particular critical event will negatively affect the implementation of the national tourism strategy. During the development of the Strategy, the effects of the COVID-19 crisis have collided with a security and political crisis due to the war in Ukraine and the resulting tense international geopolitical relations.

The Strategy also identifies a specific measure to mitigate the negative effects of the post COVID-19 crisis situations and other crisis events in the international arena on the recovery and relaunch of Slovenian tourism, which provides resources for such events and their consequences.

PROJECT

Slovenian Tourism Strategy 2022–2028

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October 2021 — May 2022

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Ministry of the Environment and Spatial Planning
Ministry of Agriculture, Forestry and Food
Ministry of Foreign Affairs
Ministry of Infrastructure
Ministry of Education, Science and Sport
Ministry of Culture
Ministry of Finance
Ministry of Labour, Family, Social Affairs and Equal Opportunities
Slovenian Tourist Board
Slovenian Sovereign Holding
Institute of the Republic of Slovenia for Vocational Education and Training
Slovene Human Resources Development and Scholarship Fund
SPIRIT Slovenia
Statistical Office of the Republic of Slovenia
Agency of the Republic of Slovenia for Public Legal Records and Related Services
Ministry of Economic Development and Technology

CONSULTATIVE GROUP ON DESTINATION MANAGEMENT – Participation of

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Maribor – Pohorje Tourist Board
Public Institute for Tourism Soča Valley
Bohinj Tourist Board
Development Agency of Savinjska and Šaleška Region

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Kranjska Gora Tourist Board
Portorož Tourist Board – EIG
Koper Public Institute for Youth, Culture and Tourism
Izola Tourism Board – EIG
Regional Development Agency of the Karst and Brkini
Institute for Tourism, Culture, Youth and Sports Brda
Turizem Podčetrtek, Bistrica Ob Sotli, Kozje Commercial Association – EIG
Development Centre Novo Mesto
Ptuj Tourist Board
The Celeia Celje Institute for Cultural Events and Tourism
Rogaška Slatina Public Institute for Tourism and Culture
Ljubljana Tourist Board
The Bela Krajina Development Information Centre
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Tourist Association of Slovenia
Alpine Association of Slovenia
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Tourism and Hospitality Chamber of Slovenia
Chamber of Commerce and Industry of Slovenia, Tourism and Hospitality Section
Tourism and Hospitality Chamber of Slovenia – Slovenian Association of Hoteliers
Slovenian Spas Association
Slovenian Convention Bureau
Association of Slovenian Cableway Operators – EIG
Slovenian Business Club
Slovenia Outdoor – EIG
Slovenia Green Consortium
Association of Tourist Farms of Slovenia
Sava Turizem, d. d., Sava Hotels & Resorts
Istrabenz Turizem, d. d.
Union Hotels Collection, d. d.
Postojnska jama, d. o. o. (Postojna Cave)
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Hotel Linhart — Business consulting in tourism, Marcela Klofutar, sole trader
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HIT, d. d.
KOMPAS, d. o. o. (KOMPAS Travel agency)
Association of Historical Cities of Slovenia
Fraport Slovenija d.o.o. — Jože Pučnik Airport, Brnik
Slovenske železnice, d. o. o. (Slovenian Railways)
Association of Tourist Agencies of Slovenia
Chamber of Commerce and Industry of Slovenia – Transport Association, Section for public
passenger transport by regular bus service lines and unscheduled road transport

Abbreviations used in the document

ADR	Average Daily Rate
AJPES	Agency of the Republic of Slovenia for Public Legal Records and Related Services
ARR	<i>Average Room Rate</i>
ARRS	Slovenian Research Agency
ARSO	Slovenian Environment Agency
ANTO	Austrian National Tourism Office
GDP	Gross domestic product
CO2e	Carbon footprint of carbon dioxide (CO2) and other greenhouse gas (GHG) emissions
CPI	Institute of the Republic of Slovenia for Vocational Education and Training
TRP	Target research programme
CSO	Chief Sustainability Officer
VAT	Value added tax
DMB	Destination management board
BAMC	Bank Assets Management Company
SA	State aids
DSU	Management and Consultancy Company
EBIT	Earnings Before Interest and Taxes
EBRD	European Bank for Reconstruction and Development
EBITDA	Earnings Before Interest, Taxes, Depreciation and Amortization
	European Investment Bank
EIB	European Cohesion Policy 2021–2027
ECP	
ETC	European Travel Commission
EU	European Union
EUSAIR	EU Strategy for the Adriatic-Ionian Region
EUSALP	EU-Strategy for the Alpine Region
EUSDR	EU Strategy for the Danube Region
GP	Institute Factory of Sustainable Tourism, GoodPlace, Ljubljana
GDC	Global Digital Campaign
IPF	Collective management organisation of performers and phonogram producers of Slovenia, k.o.
FVG	Friuli Venezia Giulia region
FT UM	Faculty of Tourism, University of Maribor
MC	Mountain Centre
EIG	Economic interest grouping
HVT	High value tourist
IPPT	Integrated Public Passenger Transport
IPF	Collective management organisation of performers and phonogram producers of Slovenia, k.o.
ITP	Integrated tourism product
PPP	Public-private partnership
PPT	Public passenger transport
CC	Capital company
KPI	Key performance indicator
SGC	Slovenia Green Consortium
CC	Competence centre
SCB	Slovenian Convention Bureau
LEADER	Programme, led by the European Community
LC	Local community
MD	Macro destinations
MDDSZ	Ministry of Labour, Family, Social Affairs and Equal Opportunities
MGRT	Ministry of Economic Development and Technology
IETC	Inter-company educational and training centre
MIZŠ	Ministry of Education, Science and Sport
MJU	Ministry of Public Administration
MK	Ministry of Culture
MRS	Macro regional strategies
MKGP	Ministry of Agriculture, Forestry and Food
MOP	Ministry of the Environment and Spatial Planning

SME	Small and medium-sized enterprises
IFRS	International Financial Reporting Standards
MZ	Ministry of Health
MZI	Ministry of Infrastructure
RRP	Recovery and Resilience Plan
NVQ	National Vocational Qualifications
OECD	Organisation for Economic Cooperation and Development
OTA	On-line Travel Agencies
MSP	Municipal spatial plan
DMSP	Detailed municipal spatial plan
CCSB	Chamber of Craft and Small Business of Slovenia
AS	Alpine society
ALS	Average length of stay
AAGR	Average annual growth rate
ACP	Anti-corona package
PR	<i>Parking area according to the systems P&R (Park and Ride with public transport); P&B (Park & Bike); K&R (Kiss & Ride — combination of passenger delivery by passenger cars and public transport); P&E (Park & Enjoy/Explore/Escape)</i>
PT	Promotion tax
AAS	Alpine Association of Slovenia
DG	Development goal
REACT	Recovery Assistance for Cohesion and the Territories of Europe
RevPAR	Revenue per Available Room
RevPOR	Revenue per Occupied Room
ROA	Return on Assets
ROE	Return on Equity
RDA	Regional development agency
RRF	Recovery and Resilience Facility
RS	Republic of Slovenia
SAZAS	A collective management organisation for the protection and promotion of musical authorship rights in Slovenia
SSH	rights in Slovenia
STDT	Slovenian Sovereign Holding
	Slovenian Tourism Digital Transformation Strategy 2022–2026
SID	Slovenian Export and Development Bank
CJA	Community of the Julian Alps
SKD	Standard Classification of Activities
RRF	Recovery and Resilience Fund
SSA	Slovenian Spas Association
SPIRIT	Slovenian Public Agency for Entrepreneurship, Internationalization, Foreign Investments and Technology
SRIPS	Technology
SRIP	Public Scholarship, Development, Disability and Maintenance Fund of the Republic of Slovenia
	Science, Research and Innovation Performance of the EU
SEF	Slovene Enterprise Fund
SRRD	Public Fund of the Republic of Slovenia for Regional and Rural Development
SRIP	Strategic Research and Innovation Partnership
STS	Slovenian Tourism Strategy 2022–2028
STH	Slovenian tourism holding
STB	Slovenian Tourist Board
SSGST	The 2017-2021 Strategy for the Sustainable Growth of Slovenian Tourism
SURS	Statistical Office of the Republic of Slovenia
GODECP	Government Office for Development and European Cohesion Policy
SWOT	Analysis of strengths, weaknesses, opportunities and threats
TA	Travel agency
TS	Tourist society
TGZS	Tourism and Hospitality Chamber of Slovenia
TO	Tour operator
TOWS	

	TOWS strategic upgrade of the SWOT – analyses external threats and opportunities and links them to internal strengths and weaknesses
GHG	Greenhouse gases
TrevPAR	Total Revenue per Available Room
TT	Tourist tax
TZS	Tourist Association of Slovenia
TCM	Town centre management
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organization
UL	University of Ljubljana
UM	University of Maribor
UP	University of Primorska
LD	Leading destination
ZGos	Hospitality Industry Act
ZRSZ	Employment Service of Slovenia
ZSRT	Promotion of Tourism Development Act
GSST	Green scheme of Slovenian tourism
ZTKS	Association of Tourist Farms of Slovenia
ZZMS	Association of Historical Cities of Slovenia

SOURCES

Sources of data and information for the analytical part of the document: SURS, Bank of Slovenia, AJPES, Slovenian Tourist Board, Ministry of Economic Development and Technology of the Republic of Slovenia, PKF and Hosting, d.o.o., private database and analysis, EU EUROSTAT, websites and portals of national tourist boards and statistical offices of Austria, Switzerland, Italy, OECD publications, ETC publications, UNWTO publications, existing strategies by tourism products and industry associations, Employment Service of Slovenia, Ministry of Education, Science and Sport.

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