



Regionalni razvojni center Koper
RRA Južna Primorska



REPUBLIKA SLOVENIJA
MINISTRSTVO ZA OKOLJE IN
PROSTOR

Project: CAMP Slovenia

REGIONAL STRATEGY OF SUSTAINABLE TOURISM DEVELOPMENT OF SOUTH PRIMORSKA BETWEEN 2006 AND 2012

Strategy Review

Hosting d.o.o.

December 2006



Občina
Divača



Občina
Hrpelje-Kozina



Občina
Ilirska Bistrica



Občina
Izola



Občina
Komen



Mestna občina
Koper



Občina
Piran



Občina
Sežana

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CONTRACTIONS

CAMP – Coastal Area Management Programme

DPPST – Development Plan and Policies of the Slovenian Tourism

RDO – Regional Destination Organisation

DMO – Destination Management Organisation

RTO – Regional Tourist Organisation

ADS – Average Duration of Stay

SURS - Statistical Office of the Republic of Slovenia

M – Municipality

TIC – Tourist information Centre

MCSO – Mediterranean Commission for Sustainable Development

LTO – Local Tourist Organisation

BIA – Business Interest Association

RDA – Regional Development Agencies

STB – The Slovenian Tourist Board

PREFACE

The Background of the Strategy Creation

The strategy of the sustainable tourism development was formed within the Slovenian CAMP programme - Coastal Area Management Programme, carried out by the Regional Development Centre in Koper between 2004 and 2006 in the area of six municipalities of the Coastal-Karst region, extending 1524km². The strategy of sustainable tourism development of South Primorska deals with the developmental possibilities and opportunities in tourism in Slovenian municipalities of Northern Adriatic: Izola, Piran, Koper, Hrpelje-Kozina, Ilirska Bistrica, Sežana, Komen, Divača until 2012.

The strategy of sustainable tourism development of South Primorska was developed in close cooperation with the preparation of five other so called individual projects within the CAMP programme for sustainable development of the region which are: Regional Conception of Spatial Development of South Primorska, Detailed Conception of Coastal Strip Spatial Arrangements, Management of Protected Areas, Regional Programme of Environmental and Water Resources, Sensitivity Maps of the Slovenian Coast and the so called horizontal projects: Regional Spatial Information System, Programme of Public Participation, Training and Promotion, Systemic and Prospective Sustainability Analysis.

The purpose of this project was to prepare **a joint vision, goals and strategies of sustainable tourism development**, a regional programme of sustainable tourism development with priority projects, to propose **a set of regional development indicators**, and to establish **"a sustainable tourist development forum for sustainable tourism development"** within **the preparation of a new regional development programme of the statistical region of South Primorska between 2006 and 2012.**

The List of Main Consultant Stakeholders on National and Local Level

Apart from the Regional development centre in Koper as the representative of the local community interests of South Primorska some main stakeholders in the area of tourism from the public sector (municipalities, local tourist organisations) have also participated in the strategy development, including non-governmental organizations, tourism companies, sectoral and professional public organizations and the residents of the area. The participants have taken part in workshops organized within the framework of CAMP project (in all five CAMP projects), particularly in the workshops and presentations within the strategy preparation in September and November of 2005 and June 2006.

I. INTRODUCTION

1.1 Project Area

The South Primorska region is quite versatile. It is geographically bordered according to geomorphological and climatic characteristics. Statistically, it belongs to two statistic regions, the Coastal-Karst comprised of Divača, Hrpelje, Kozina, Izola, Koper, Komen, Piran and Sežana municipalities and Carniolan-Karst represented by Ilirska Bistrica due to the fact that the project is based on the 2002 established cooperation of the municipalities within the preparation of the Regional development programme of South Primorska document.

The geographical limit ranges from the Slovenian border at the Adriatic Sea along Brkini to the high Karst Snežnik plateau where the continental influences prevail. The flysch coast hills and the limy Brkini flysch hills range from the Karst to the Jelšane valley and the Reka river valley. A river net with areas likely to be flooded and areas with danger of draughts is typical of the flysch coast hills and the Brkini Region.

South Primorska also includes the Karst, a landscape between the Gulf of Trieste and the Vipava valley. It is a plateau of limestone, which rises with a sharp edge, around 100m high above the Soča plain in the Southeast direction. In the area of Divača Karst it reaches a height between 400m and 500m. The Karst plateau continues along the Southwest side of the Slavnik mountain chain called Podgorje Karst and continues into Doberdob Karst, which is already on the other side of the Slovenian border.

This part of Slovenia is prevailed with a Sub Mediterranean climate with temperatures above average, a higher possibility of windiness and dry spells, seldom occurrence of frost and snow, more sunlight and clarity.

The geological structure (flysch and limestone), the relief and the sea together with the climate, all form this typical diversity of the landscape. All these factors cause the diversity of hydrological, floral and cultural particularities. Coastal karst and dinaric areas as well as littoral and dinaric flysch hills are a component of this region.

The region borders Italy in the West and Croatia in the South.

Chart 1: A map of the South Primorska region



1.2 Sustainable development – a new quality in designing tourist development

Tourism development strategy includes sustainable development and the most contemporary trends in tourism with the emphasis on developing sustainable coastal tourism trends, eco tourism, cultural tourism, trends in tourism marketing, especially the differences in marketing sustainable tourism, and trends in individual sustainable tourism products and services, as well as sustainable praxes of main stakeholders. The strategy exposes current challenges/problems in the field of tourism. **Tourism development scenarios** have also been created. The focus lies on sustainable tourism development, as an optimal possibility of tourism development in the area of discussion for optimal advantage of resources and advantages for tourist development needs by principles of "solidarity" and agreement between social, economical and environmental factors. Carrying capacity of the area mentioned in this document relates merely to the coastal strip. This is the only area with the threat of exceeding the carrying capacity of tourism space development, expressed with the chosen indicators.

Why do We Talk About one Destination and Three Sub destinations?

The strategy comprises an area of eight municipalities, considering it as a **single area of tourist destination** due to the purposes of tourist arrivals to this destination, i.e. the variety of tourism offers, including coastal, eco, cultural and other types of tourism in this particular region. It must be stressed that the tourists visit only **the territorial-administrative area (statistical region) of eight municipalities of South Primorska**, containing variety of **tourist destinations** - towns, settlements, villages - **which trade their own diverse tourism products**. These are tourist areas (sub regions) with some ten tourism products and services, originating from various treasures in tourism enabling substantial growth and development of the existent and new tourism products, attractive to the market. The tourist regions or destinations are situated in circular geographical areas of the Karst, Ilirska Bistrica with Brkini, and Slovenian Istria with the coast. Tourist destinations of the Northern Adriatic (unlike many tourist **sub destinations of the South Primorska region**) represent geographical area with several different tourist sights and attractions.

For the purposes of tourism development, classified by this document, the term "tourist region (destination)" is used for statistical region of South Primorska (*RRP of South Primorska used an equal classification "region" which has been exchanged with "destination" for the use of the latter in market development strategical documents on a national level*), comprising the territory of 1524km² along the Northern Adriatic Sea with the ambition to expand the development issue regionally and internationally.

Article 4 of the Promotion of Tourism Development Act in the Republic of Slovenia classifies a tourist destination (region) in the Slovenian territory "**tourism area**" defining it as a "geographically rounded off area of one or more municipalities, providing a **certain set of tourism services or an integral tourism product** (including accommodation, catering, entertainment, recreation and other types of leisure and services), which is crucial for the tourist's choice of destination." Some tourist destinations in this strategy **extend beyond administrative borders of the South Primorska region and the national border**, because, for example, the set of tourism products of the Karst tourist destination is not limited to administrative borders of the eight municipalities. Moreover, within this strategy, the Karst is considered as one of the three development "sub destinations" only in the part of South Primorska region (approximately 65% of the Karst territory extends beyond the boundaries of the neighbouring Italy all the way to the sea and over four administrative Slovenian regions).

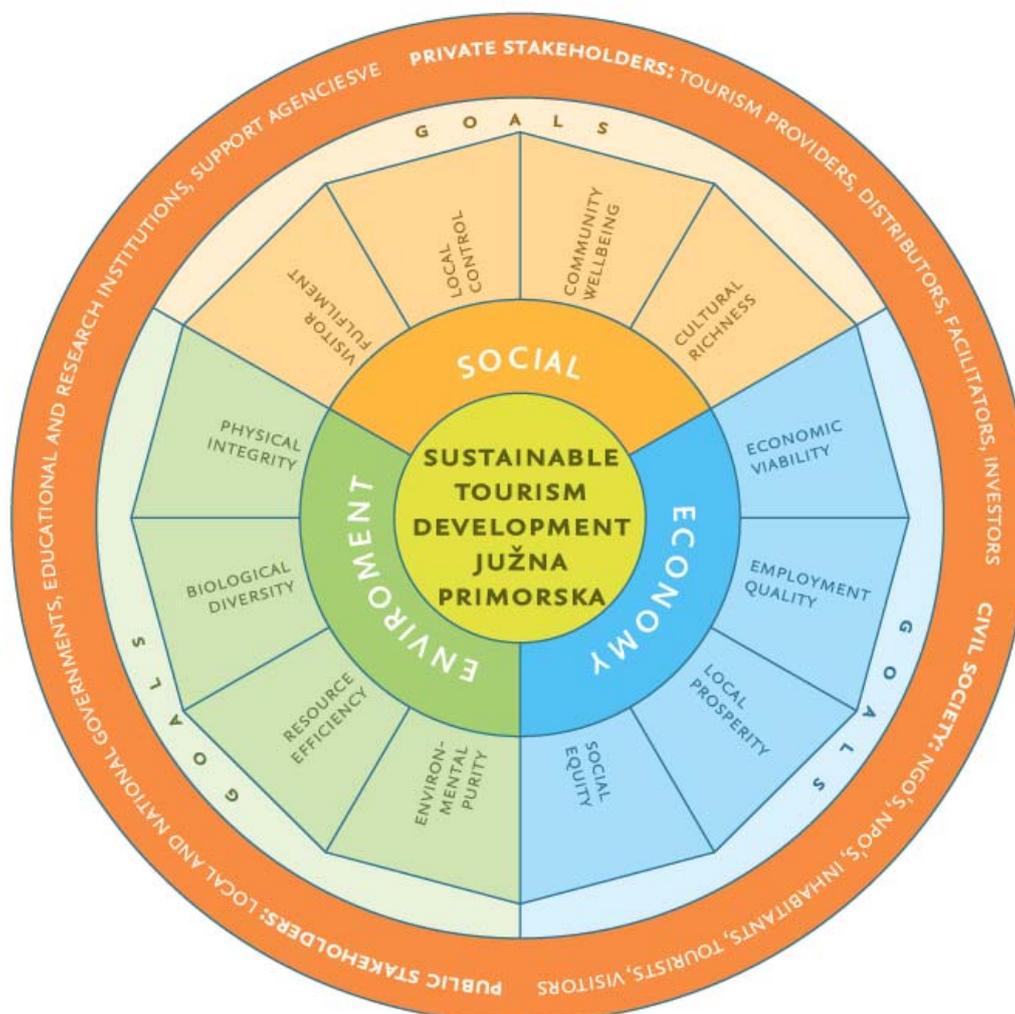
Due to unique characteristics and natural as well as cultural resources, on which the offer is based, and more so the different potential for development of natural treasures for tourism development of the entire destination, the strategy covers the so called three **"sub destinations"** – Slovenian Istria, Ilirska Bistrica with Brkini and the Karst. **Sub destinations are intercompetitive and complementary at the same time.** To a certain extent, they provide similar products and services, and are exceptional in many ways, having advantages and opportunities on their own target markets which increases the attractiveness of the entire destination. By focusing the offer according to the specific natural and/or cultural resources and exceptional character of the products, the creation of which is based on these resources, the strategy tends to direct the sub destinations toward a special competitiveness within the destination of South Primorska (and also outside the destination in relation to other destinations in Slovenia and its neighbouring countries, especially across the border) by directing to focusing and specialising the offer according to specific natural and/or cultural treasures and the exceptionality of products and services which are customary to these specific areas. The strategy classifies the possibilities of how the tourist offer can take advantage of its resources and developmental potentials in these three sub destinations in a more sustainable and balanced way. This means that the socio-cultural and economic development viewpoints are linked together – never to the advantage of a sole viewpoint, however, to the advantage of equal (re) distribution of tourists, developmental factors and layout of spatial issues.

The purpose of the strategy is making **Slovenian Istria a coastal destination and establishing its own specialized offer of tourism products in conference tourism, nautical, health and wellness tourism.** Competitive advantages of the **Karst** sub destination **are exceptional natural and cultural treasures (Lipica, Štanjel, Škocjan caves park, Karst edge, architectural landscape, gastronomy) and the exceptional underground world, being a unique and special worldwide competitive tourism product.** The competitive advantages of this sub destination are therefore cultural tourism and products based on speleology. **Ilirska Bistrica-Brkini boasts with extremely well preserved nature and should establish its competitive advantages within the destination of South Primorska in the trendy ecological tourism, offering the product of hiking, hunting/fishing and discovering nature in a thousand different ways around this kind of tourism of balanced development activities.**

The integration of tourist offer into one destination and joint appearance on various target markets is also in the interest of local communities and the relevant stakeholders in the area of tourism for this particular area. In this way, the principles of substantial development of which the most developed coastal area will be relieved on account of under exploited development prospects of rural areas in the hinterland of Slovenian Istria, the Karst region and Ilirska Bistrica, shall develop more rapidly and effectively.

The organisations driving the development of tourism in destinations and future management destination and its integral marketing are specified in an organisational model of destination management. This model defines the competences and responsibilities of all development stakeholders and tourism operators. In order to establish an integral system for sustainable destination management, the formation of public and private partnership organisation is foreseen. DSSTS (Development Strategy and Slovenian Tourist Directives) names the latter DMO (Destination Management Organization), which is also the term used in this document.

Picture 1: Rosette of Sustainable tourism development in South Primorska



1.3 Starting Points of Sustainable Tourism Development

United Nations Environment Programme (UNEP) and **World Tourism Organisation (WTO)** issue guidelines to governments and local communities for sustainable tourism development within the **Mediterranean Action Plan (UNEP – MAP)** and in the **Guide for Policy Makers (WTO)**³ respectively. The goals emphasized by the World Tourist Organization and United Nations Environment Programme in the field of sustainable tourism development are mutually dependant and effect the making of development policies in the field of economics, employment, environment, customer protection, local self-government, environment, nature, farming and culture protection as well as spatial planning. A more accurate content of the guidelines can be found under 2.11.

³ Making tourism more sustainable, A guide for Policy Makers, United Nations Environment Programme and World Tourism Organisation, 2005

Development Plan and Directives in Slovenian Tourism between 2007 and 2013

In the new Development Plan and Directives in Slovenian Tourism between 2007 and 2013 the starting points of sustainable tourism development measures can be found in the chapter on politics of sustainable, spatial and regional development. The measures come from the assumption on determining the geographical area and a tourist destination of various dimensions (state, region, local communities, tourist points) respectively. The measures are linked on the base of equal and co-dependent economic, social and environmental factors. Tourist policy will ensure the carrying out of three main sustainable development conditions in the field of tourism:

- Protection of the natural environment and sustainable use of available sources
- Taking into account the values of society (identities) and reducing negative effects of mass tourism
- Efficiency of tourism products and companies

Among state measures for enforcing sustainable principles are also:

1. Development of sustainable tourism pointers with the aim to encourage development, tracking achievements in sustainable development and defining key pointers of sustainable tourism development at different destinations.
2. Spatial planning of tourism development with the goal to ensure satisfactory spatial conditions for tourism development together with sustainable principles.

II. EVALUATION OF THE TOURISM SITUATION

2.1. Socio – economic Analysis

Demographic Characteristics

- Unequal distribution of population
- A high level of population growth on the coast and the opposite in the hinterland
- Population ageing
- Low level of employment in tourism considering the potential of the region

Key Challenges in the Field of Employment

- Educational structure is not adapted to the needs and trends of tourist economy development
- Lack of highly qualified staff and specialised staff in tourism (management)
- Unfavourable ageing structure in the region attracts work force from other local and foreign regions and sectors; neither tourist industry nor environment are fully prepared for engaging foreign work force or work force from other parts of Slovenia (e.g. from winter destinations)
- Unattractive professions in tourism
- Seasonal work
- Inflexible employment models as a consequence of stiff employment legislation

2.2. Natural and cultural sources

Due to diverse relief, climate and geological texture, which altogether condition hydrological, floral and cultural particularities, South Primorska is full of unique natural beauties. The Karst with its numerous karstic phenomena, the most beautiful part of subterranean world on an international level, the coast with a natural reserve consisting of massive marl and sandstone blocks and the unique Strunjan cliff, reaching the height of 80 metres above sea level, making it the highest flysch wall along the Adriatic coastal strip, the saltpans of Sečovelje, numerous olive plantations, vineyards, peach and cherry orchards are only a few of the region's natural sights. Numerous protected areas of natural heritage are also typical of this region.

A unique challenge in sustainable tourist development **is preserving and strengthening biotic diversity** as a tourist potential. The latter is namely reducing due to:

- Increased population density in the coastal strip (also as a consequence of broadening the tourist infrastructure)
- Intake of pollutants and excessive amounts of organic substances and communal wastes
- Pollution of hinterland water courses while minimizing the inflow of unpolluted water
- Sea pollution on account of releases from vessels
- Drying out wetlands and shoreline vegetation
- Hinterland urbanization and intense farming
- Overgrowing of dry grasslands
- Polluted ground waters (underground habitat types)

Integrating Cultural Resources in the tourist offer is a special challenge due to:

- Unexploited possibilities for tourism development and trading services in facilities of cultural heritage and public cultural infrastructure
- Marketing of cultural heritage and modern culture creativity in tourism
- Accessibility of cultural goods for various target groups
- Underdeveloped cultural tourism products according to their potential (e.g. culinary tourism, enogastronomy, cultural thematic trails, events, etc.)

2.3 Tourism and the Environment

Challenges in the field of tourism influences on the environment and influences of the environmental changes on tourism

- Consumption of natural sources (especially energy and water) in tourism
- Waste production
- Water pollution on account of tourism (especially due to unorganised communal infrastructure – communal waste water, sea pollution – marines)
- Environmental effects on account of traffic, largely contributed by tourism (air pollution – especially ozone, Nox, dust particles), noise
- Noise is also caused by theme parks, dance floors and various events
- Threatening of spatial potentials (landscape, cultural heritage, biodiversity) on account of building new tourist capacities

2.4 Tourist Infrastructure and Services

Accommodation

Key challenges in the structure of tourist economy, especially its accommodation infrastructure are an imbalanced arrangement of spatial capacities and imbalance in the structure of the tourist offer (most frequently bound by tourist accommodation infrastructure). Reasons for this are:

- Concentration of accommodation capacities along the Istrian coastline which creates imbalanced arrangement of tourist accommodation capacities as well as imbalanced structure of necessary modern and up to date accommodation capacities
- Other types of accommodation capacities in the hinterland (the countryside of Slovenian Istria, Karst and Brkini) are unexploited or not exploited enough. There is a lack of small modern accommodation capacities as a consequence of intense tourism development
- Partially inadequate quality of accommodation facilities according to the desired offer development
- A large part of the accommodation capacities are non-profitable (holiday homes, youth homes, homes for the elderly and the disabled) and take up most of the prestigious locations, which is a development challenge considering the marketing of micro locations and modifying tourism into a higher quality class
- A lack of artificial attractions and support system infrastructure (especially for larger sport and cultural events)
- With the exception of marinas, there is a lack of accommodation on water
- Insufficient records

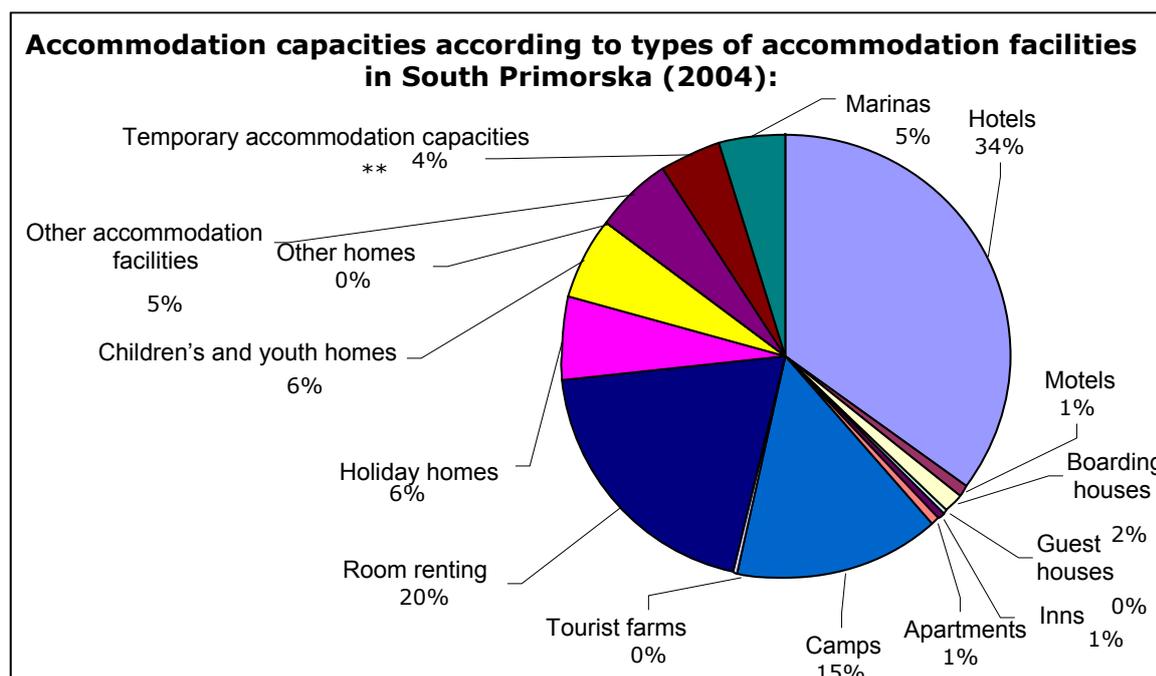
Table 1: Accommodations according to types and tourist sub destinations in 2004

BEDS ACCORDING TO TYPES OF ACCOMMODATION AND AREAS IN 2004								
Area Type of accommodation	Slovenian Istria		Karst		Ilirska Bistrica		South Primorska	
	Nr.	%	Nr.	%	Nr.	%	Nr.	%
Hotels	7.778	34,9	339	36,5	0	0,0	8.117	34,8
Motels	48	0,2	140	15,1	0	0,0	188	0,8
Boarding houses	251	1,1	111	11,9	18	28,6	362	1,6
Guest houses	0	0,0	14	1,5	20	31,7	34	0,1
Inns	95	0,4	59	6,3	0	0,0	154	0,7
Apartments	144	0,6	7	0,8	0	0,0	151	0,6
Camps	3.300	14,8	110	11,8	0	0,0	3.410	14,7
Tourist farms with accommodation *	0	0,0	22	2,4	16	25,4	38	0,2
Room renting	4.524	20,3	88	9,5	0	0,0	4.612	19,8
Holiday flats	1.369	6,1	0	0,0	9	14,3	1.378	5,9

Children's and youth homes	1.383	6,2	0	0,0	0	0,0	1.383	5,9
Other homes	44	0,2	0	0,0	0	0,0	44	0,2
Other accommodation facilities	1.222	5,5	40	4,3	0	0,0	1.262	5,4
Temporary accommodation capacities	1.031	4,6	0	0,0	0	0,0	1.031	4,4
Marinas	1.100	4,9	0	0,0	0	0,0	1.100	4,7
Together	22.289	100	930	100	63	100	23.314	100

Source: SURS, 2005

Diagram 1: Accommodation according to types and tourist sub destinations in 2004



Source: SURS, 2005

Support System Infrastructure / Recreation

Key Challenges in the Field of Recreational and Sports Offer (the Field of Sports and Recreational Infrastructure):

- A lack of sports centres and sports facilities (swimming pools, stadiums), the existing are out of date and unfit for certain sports activities
- The existing sports infrastructure is not sustainable, parking spaces and public access are especially problematic
- Modifying thematic trails which would enable insight to the whole South Primorska (also the possibility of cycling) and could connect to international trails with the neighbouring Croatia and Italy
- Modifying walkways along the coast and integration into a product of walking
- Creating cross-border recreational and thematic trails with Italy and Croatia
- Lipica stud farm and other protected areas are unsatisfactory and insufficiently integrated in the tourist offer net in the greater area

Challenges in the Field of Sports and Recreational Events and Related Services:

- Complementary marketing of sports tourism products in each region (at least on the destination level not only locally)

- “Glocal” marketing in the field which is world renowned in the field of karstology and speleology
- Creating new recreational products which would ensure circling of guests in activities near, on and in the water
- Intensifying the offer of additional adrenalin holiday experiences on water
- Developing suitable research products in the field of speleology for small groups
- Creating interesting marketing products for nature observation, sea and river fishing
- Adapting marketing according to niche target groups
- Studying sustainable views of products
- Recognition

Attractions / Existing Tourism Products / Events

Challenges in the Field of Rural Tourism:

- Incorporation of local food and drink production in a comprehensive tourist offer of a tourist destination and its specific areas
- Ensuring large enough quantities and quality of products and drinks in the offer chain
- Creating brands and marketing local food products and drinks
- Constructing attractive tourism products and services for rural development
- Sustainable support of rural events
- Investing in smaller accommodation capacities on a larger scale

Nautical Tourism Issues:

- The quality of services is behind the growth trends of nautical tourism
 - Limited offer of marine services
 - Uncompetitiveness of marinas in regard to other marinas in the North Adriatic
 - Limited coverage of capacities, especially taking into account spatial carrying capacities
- Weak integration of marinas with coastal towns (recreational trails, signalisation, public access)
- Lack of information on available marine services in other Slovenian destinations and other product areas where potential nautical tourists may be (e.g. golf courses, Bled), Croatia, Italy and Austria
- Lack of quality logistic supporting infrastructure for receiving coast liners

Event Infrastructure

Due to extremely rich cultural and architectural heritage events and other happenings take place in existing facilities of cultural heritage such as castles, palaces, sacral facilities, museums which should be especially taken advantage of due to its ambient and architectural value and incorporate an important segment of cultural heritage in the comprehensive tourist offer. Like the rest of the world, what represents a unique challenge, is the integration of public infrastructure in this region’s tourism with tourist companies’ interests and assurance of a public-private partnership by maintenance and new constructions of multi-purpose halls and event facilities to better take advantage of the needs and synergies of local communities (residents) and tourist providers (companies). This way we could reach a higher balance with ensuring higher quality of life and tourist offer on one side, and improve the guest structure and number of visits in the region on the other side and we would, above all, satisfy the tourist needs for more local culture.

Accessibility and Traffic

ROADS

- Poor accessibility to certain parts of areas (remoteness of sub destination Ilirska Bistrica from highway traffic flows)
- Traffic density on coastal roads during the season
- Lack of parking spaces
- Decrease of traffic in town centres, settlements and village centres

SHIPPING

- Development of a passenger terminal for coast liners in Koper
- Inexistent local sea public transport, private was not economical
- No regular sea connection to Italy and Croatia (only organized tours)

AIR TRAFFIC

- Weak use of larger neighbouring airports Trieste (I) and Pula (HR)
- The airport in Sečovelje does not enable larger planes' landings. In the hinterland there are no airports or airfields (larger or smaller) for panoramic over flights
- Possibilities for larger use of sports airports and small planes, especially for high-level guests have not been studied
-

RAILWAY

- Railway connections from Ljubljana and other larger cities only to Koper, weak role of railway traffic
- No local access to final destinations for tourists
- International railway connections to destinations are too weak
- No railway programmes for intermodal tourist transportation (combination of road, railway, ship and if needed airplanes for fixed target markets)

INTERMODAL SYSTEMS

- Connections between various forms of transport are poorly or not at developed

Informational Support

Key Challenges in the Field of Informational-Communication Technology Exploitation

Apart from imperative investments into building a broadband network, a larger use of available capacities of existing networks will be necessary.

In the field of user application it is/will be necessary to digitalise the offer content for the use in different informational media – multimedia (interactive television, mobile phones, etc.)

A bigger challenge in the field of informational-communication technology exploitation for enhancing the accessibility and larger recognition of the region's tourist offer is also a central informational and reservation destination system and administering the electronic and digital media contents for the needs of comprehensive tourist destination development.

2.5. Marketing Analysis of the Existing Tourist Offer

So far, marketing activities in the South Primorska region have been unrelated and inconsistent which is stressed as a weakness in all existing local strategical development documents. Due to unrelated and scattered marketing the information on efficiency of marketing activities, tools and results is regionally not tracked, during the time of analysis no detailed marketing documents with specific definitions on a concrete or executive level was available.

Existing Guest Structure

Essentially, there is an incomparable difference between coastal municipalities and the hinterland.

According to guest formation in Slovenian Istria, the municipality of Piran has been the most frequently visited in all comparative years. The latter also provides the richest variety of holiday activities, especially in the summer.

Foreign tourists who have exceeded the limit of 200.000 in 2003 prevail. Arrivals of domestic guests have reduced in number, the highest being in 2000 which was followed by a slight fall.

Domestic guests prevail in the municipalities of Koper and Izola, the number of arrivals is around 50.000 per year.

The municipality of Piran records the highest number of guests due to the close location of Portorož, which is very attractive to tourists because of its high development, including a number of hotels with a modern approach to tourism products (wellness, congress tourism). Another reason for visiting Piran are architectural and cultural sights. In other coastal municipalities, tourist activity does not receive as much attention as Piran, which is evident from a weaker tourist offer, a smaller number of primary accommodation facilities, programmes and activities and therefore a lesser number of guests. Among the discussed coastal municipalities, event coordination (especially in the summer season) is underdeveloped, however, if that were to change, it would enable the circulation of tourist traffic, inquiry and equal burden of the area.

In accordance with the number of arrivals, the coastal municipalities create the highest number of tourist overnight stays (also on a national level). The tourist offer relates to the summer season.

In the municipality of Piran foreign overnight stays prevail, which is understandable, if the overnight stays are compared to arrivals. The reasons for such a high number of overnight stays are numerous, especially primary accommodation facilities (hotels), and other developed tourist offer.

In the number of overnight stays, domestic guests prevail in the municipality of Koper and Izola. Domestic guests, who decide to spend their holiday at the Slovenian coast, usually choose staying at secondary accommodation facilities. Compared to the municipality of Koper, the municipality of Izola records a slightly higher number of overnight stays, since Koper, according to tourists, has the least favourable image of a "tourist town". It is an industrial centre with a port, although it has favourable, predominantly cultural elements, which could contribute to the development of tourism in this town (old town centre, events, etc.).

In 2002, the municipality of Piran recorded the highest number of overnight stays, however, in the last two years it has been dropping.

The trend of tourist overnight stays in the other two coastal municipalities is less explicit. In 2004, the number of overnight stays has risen only in the municipality of Koper.

Duration of Stay

The average duration of stay of domestic and foreign tourists differs according to individual municipalities, however, major differences can be seen according to coastal and hinterland areas respectively. Among the municipalities of South Primorska region, Izola has the highest duration of stay, mostly due to specialised offer for seniors and summer holidays. The lowest duration of stay is recorded in the municipality of Divača (regardless of the fact that it is the home of the world famous Škocjan caves), where the average duration of stay has increased compared to the latter years, however, it has not

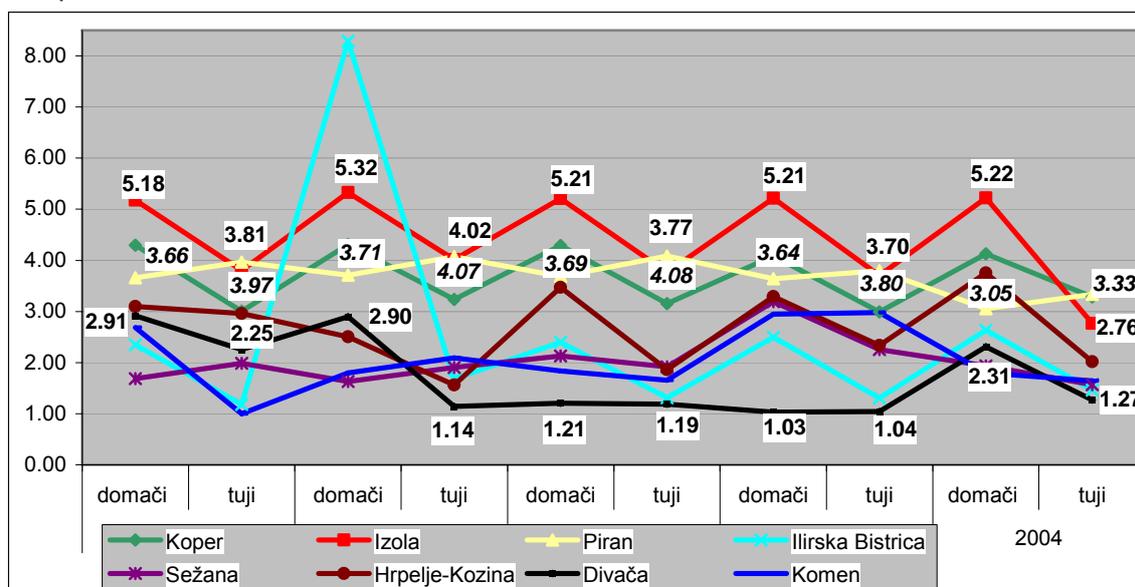
reached the level from the first comparative year (2000). The municipality of Piran has the most regular allocation of the duration of stay among domestic and foreign guests and qualifies as one of the leading destinations of the region and Slovenia in general according to the intensity of tourist traffic. The trend in the last few years points to the shortening of the duration of stay in the tourist world, which is also clearly reflected in the South Primorska region. The average duration of stay has decreased in all municipalities (comprehensive comparison between 2000 and 2004), with the lowest real decrease in Sežana and Komen and the highest decrease of the average duration of stay in the municipality of Divača.

The average duration of stay in Slovenia in 2003 was 3,3 days and has decreased compared to 1995 (3,7 days).

The municipality of Izola has the highest average duration of stay on the coast, the municipality of Hrpelje-kozina in the hinterland, although the starting values, from which the calculation was made differ profoundly (the intensity of tourist inquiry is actually incomparable).

In certain municipalities, for example in Ilirska Bistrica, certain years record obvious deviations due to minimal tourist visits which is often related with different economic, educational, protecting or other events. The latter effect the result due to the small yearly number of visits and in many cases have no real "tourist" basis.

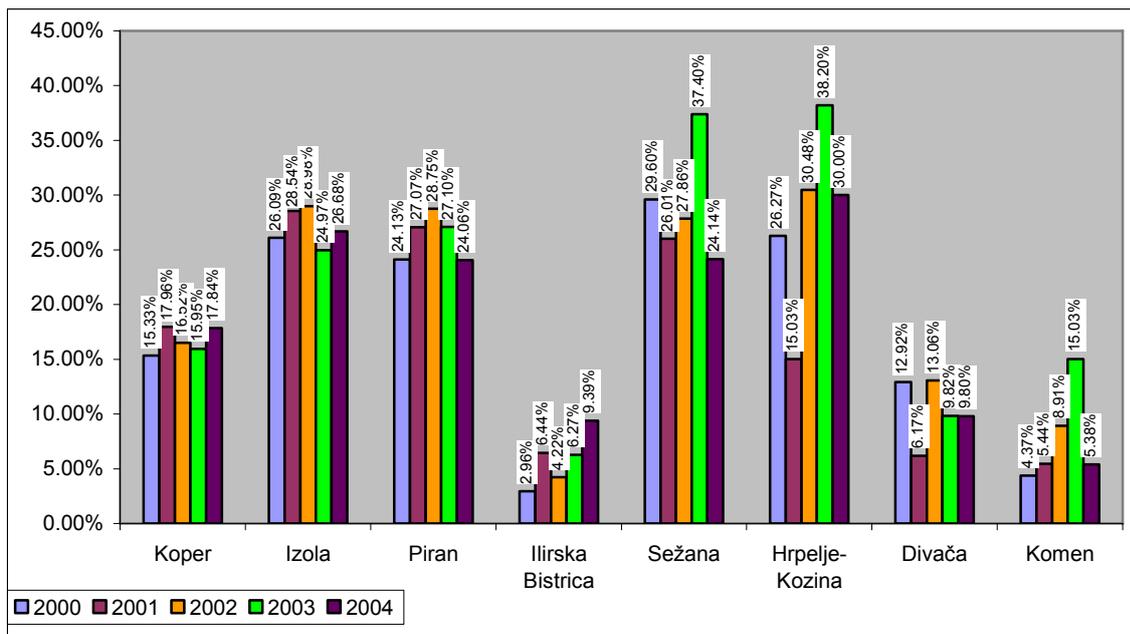
Diagram 2: Comparison of average duration stay of domestic and foreign tourist in municipalities of South Primorska between 2000 and 2004



Source: SURS, 2005

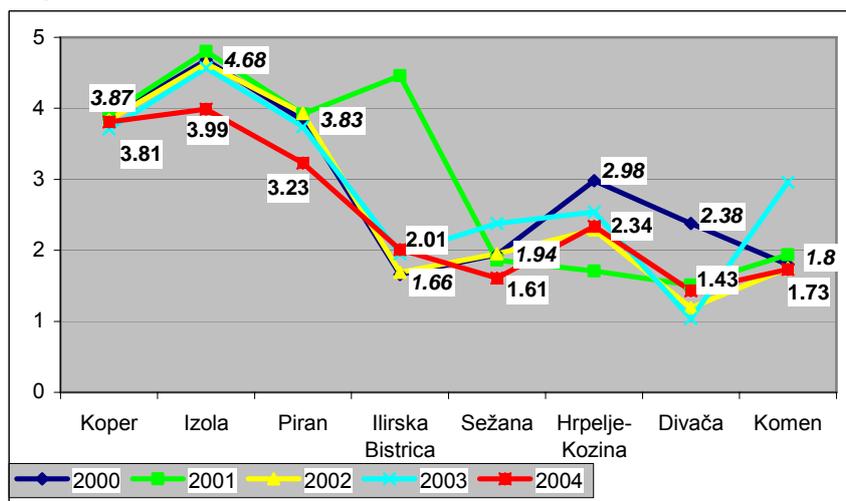
Domači – domestic
Tuji - foreign

Diagram 3: Comparison of average bed occupation in municipalities of South Primorska during 2000 and 2004



Source: SURS, 2005

Diagram 4: Comparison of average duration of tourist stay in municipalities of South Primorska during 2000 and 2004



Source: SURS, 2005

Table 2: Average duration of tourist stay according to location type

	Together	Capital city	Locations with health resorts	Coastal locations	Alpine locations	Other tourist locations	Other locations
1995	3,7	2,2	5,5	4,5	3,3	2,0	2,4
1996	3,5	2,0	5,4	4,1	3,2	1,9	2,6
1997	3,5	2,0	5,4	4,1	3,2	1,9	2,4
1998	3,5	2,0	5,4	4,1	3,2	1,9	2,2

1999	3,5	2,2	5,2	4,0	3,1	1,9	2,2
2000	3,4	2,0	5,1	4,0	3,1	2,0	2,4
2001	3,4	2,0	4,9	4,1	3,1	1,9	2,5
2002	3,4	2,0	4,8	4,0	3,1	2,0	2,4
2003	3,3	2,0	4,7	3,9	3,0	2,1	2,2

Source: SURS, 2005

Seasonality of Visits

A monthly review of tourist visits in coastal municipalities shows a seasonal profile of tourist inquiry. Summer season prevails in all three municipalities in accordance with the relationship between accommodation and the attractiveness of the destinations. The lowest seasonal fluctuation is recorded in the municipality of Piran, because in recent years Portorož has been successfully focusing of gaming, business tourism, health tourism and wellness respectively and these have caused deseasonalization of tourist inquiry or allocation of inquiry throughout the year.

February of last year marks the lowest number of foreign guests in the municipality of Piran while the highest number was in August. The lowest number of domestic guests was in December and the highest in July, where the latter number reaches 60% of the highest number of foreign guests.

Koper has a well-developed summer season which peaks in July and August. Last year the lowest number of domestic overnight guests was in January and the highest number in July. With foreign overnight guests, the lowest number was in November and the highest in August, however, the foreign guests represent well over a half of the seasonal number of domestic guests.

Izola has a constant minimum rise in visits until the summer, the peak being in August, which records the highest number of domestic and foreign guests. After that the number of visits drastically falls and reaches the lowest difference in proportion to the number of domestic and foreign guests.

The municipality of Piran records the highest number of overnight stays, which is normal and expected according to the organization and variety of tourist infrastructure. The proportion of domestic and foreign guests stands at 36:64.

The municipality of Izola creates more domestic overnight stays throughout the year due to the seniors who "make sure" that Izola has a relatively favourable average duration of stay throughout the year, mainly by domestic guests. In the municipality of Koper domestic guests create most overnight stays mostly in summer months, which shows, that they spend their holidays here (especially in Žusterna and Ankaran).

A comparison of tourist visits in the Karst municipalities and Ilirska Bistrica shows relatively constant visits to Sežana (Lipica), mostly by foreign guests, where a fall is recorded only in winter months. The municipality of Hrpelje-Kozina and in a smaller portion Ilirska Bistrica are mostly visited in July and August (especially by foreign tourists). Other municipalities have such low level of tourist inquiry (or none) that a comparison is practically impossible, which very clearly reflects the programme and infrastructural tourist underdevelopment of the hinterland, which does not make proper use of its rare individual sights (with the exception of Sežana, which still has a lot of "reserves").

Reasons for Visiting

Guests visit the tourist destination South Primorska for different resources of the region or sub destinations, which satisfy their travelling motives and needs. The latter is more accurately defined in chapter 4.4; also in chapter *Marketing objectives and sustainable*

tourism marketing in the main analytical-strategical document where there are interest goal segments listed according to individual sub region or sub destinations.

Challenges in the Field of Marketing

According to data on average duration of stay, it would be reasonable to find solutions for extending the duration of stay. This is connected with developing a quality and trendy offer and increasing its diversity. With longer duration of stay, the tourists would leave more financial resources in the region. Apart from that, it is also necessary to work on increased spending of the existing guests.

With larger tourism income (due to extended duration of stay and larger daily guest consumption) the infrastructure and superstructure of the areas would improve and new tourism products would be easier to produce. They would also prolong the duration of stay and increase the number of tourist visits. Supplementary tourist activities and offer organization with field guest guidance are underdeveloped which undoubtedly decreases the average duration of stay. Other challenges in the field of developing and marketing the tourist offer are the following:

- A clearer definition of tourism products and intensifying "experience-emotion" marketing instead of "realistic offer"
- Connecting the planning of marketing activities for greater marketing efficiency (dismantle local fragmentation)
- Disconnectedness of marketing activities and inconsistent use of marketing tools or combinations of the latter
- Improving the marketing system on the level of destination (so far every company and bidder market alone)
- A clearer definition and more specific classification of marketing segments in developing documents since the existing are no longer in accordance with the offer and trends on the tourist market
- Defining marketing goals for larger measurement and with that improving marketing efficiency
- Following marketing results and possible adjustment of tools according to desired effects
- Intensifying the use of modern communication and marketing channels
- Significant increase of marketing means (especially on account of developing new products and services)
- Intensifying skills for preparation of effective marketing and prior organisation of marketed offer on field (existing market promises remain incomplete)

2.6 Tourism in Spatial Plan Acts

2.6.1. Slovenian Spatial Development Strategy

In the field of tourism development Slovenian spatial development strategy gives general guidelines, which only partially relate explicitly to sustainable development.

Development guidelines in the field of tourism are given within several priority directives:

- Intensifying recognition and quality of landscape's natural and cultural characteristics

Landscape and natural characteristics enable spatial development and development of other activities which enable recognition on a national level. The ability to include cultural trails in the tourist offer.

- Spatial development with special potentials and problems

Ensuring a comprehensive spatial coast design where interests of development activities coincide with spatial possibilities and protection requests, while establishing conditions

for quality tourist offer development and ensuring sustainable access to coastal and bathing areas.

Sustainable development principles are especially emphasized within spatial systems development, especially in the fields of:

- Tourist residences

Tourist residences are a part of tourist capability development. The number of tourists exceeds the number of inhabitants by 50% in a period of one month, during the highest tourist visit when infrastructure development must take into account natural resources and architectural heritage.

In rural settlements and villages where tourism is still developing, a design recognition is being created and maintained.

- Communal land building

Energy design with analyses of possible exploitation of locally available energy sources shall be made for existing and new residences and for designing new facilities and their self-sustainability with energy.

- Renovation of cultural heritage and other architectural heritage in residences

Priority shall be given to renovation ahead of new construction projects, which is a part of a wider spatial identity and represents quality architectural heritage.

- Renovation of degraded urban areas

Programme starting points and spatial plans shall be made for renovation of degraded urban areas taking into account diverse interests of property owners, investors, planners and town administration.

- Recognition of Slovenia from the aspect of cultural and symbolic landscape significance

Slovenian seaside has a special cultural and symbolic significance, therefore, spatial development, which preserves the seaside and its biotic diversity, must be ensured.

- Preserving the recognition of landscape areas

Developmental factors, which increase the attractiveness of the areas for living, investing and visiting, are recognition factors. In these areas sustainable use of heritage, tourist development in connection with cultural values and traditional farming activity, the making of cultural trails, etc. contributes to economic development, preservation and increase of recognition.

- Ensuring preservation of recognisable characteristics on the level of landscape regions

In Karst the structure of Karst fields, valleys and other natural and spatial distinctive features must be taken into account, especially the vulnerability of aquifers and subsoil. In regions of Primorska relief and geomorphologic characteristics, vulnerability of natural parts of the coast and sea as well as landscape-ecological significance of natural growth must be taken into account.

- Tourism and free-time activities development

The coast shall see increase of quality and use of modern technologies with the goal to decrease the use of natural sources and relieve the environment and space. When planning new tourist areas degraded urban areas must be considered first. Coastal bathing areas development includes ensuring modern and attractive bathing capabilities, public and passenger sea transport, accommodation capabilities and tourist programmes relating to Slovenian Istria nad Karst. In Karst, tourism relating to natural particularities is developing, including the vulnerability of these areas. Tourist and other free-time activities shall be restructured and spatially balanced so they connect individual existing

and new programmes and avoid excessive programme concentration and space infrastructure.

2.6.2. Tourism in Municipality Spatial Plans

Legal Background:

Recently, the legislation in the field of spatial planning in Slovenia has been variable. In April 2007 a new law (Spatial Planning Act) was passed, which substituted a Spatial Planning Act from 2002. The latter substituted an older law on planning and spatial managing, which ensured urgent adaptations in the field of spatial legislation, demanded by radical social changes in the beginning of 1990s (gained independence, introduction of parliamentary democracy, transition from self-governing socialism to capitalist marketing economy). Even today the spatial plan acts, mostly prepared at the end of 1980s still apply but have, however, undergone changes at the initiative of individual investors. The new spatial act states that municipalities must approve new spatial plans within two years (after approving implementing regulations).

An overview of spatial plan acts from the aspect of tourism development in all municipalities of the region shows uneven spatial allocation of tourism development: intense development and new initiatives in Slovenian Istria (more accurately, at the coastal strip) and setback in the Karst region, especially Brkini. Due to the level of this issue, we offer an overview of the problems in tourism development in spatial plan acts in municipalities of Koper, Izola and Piran.

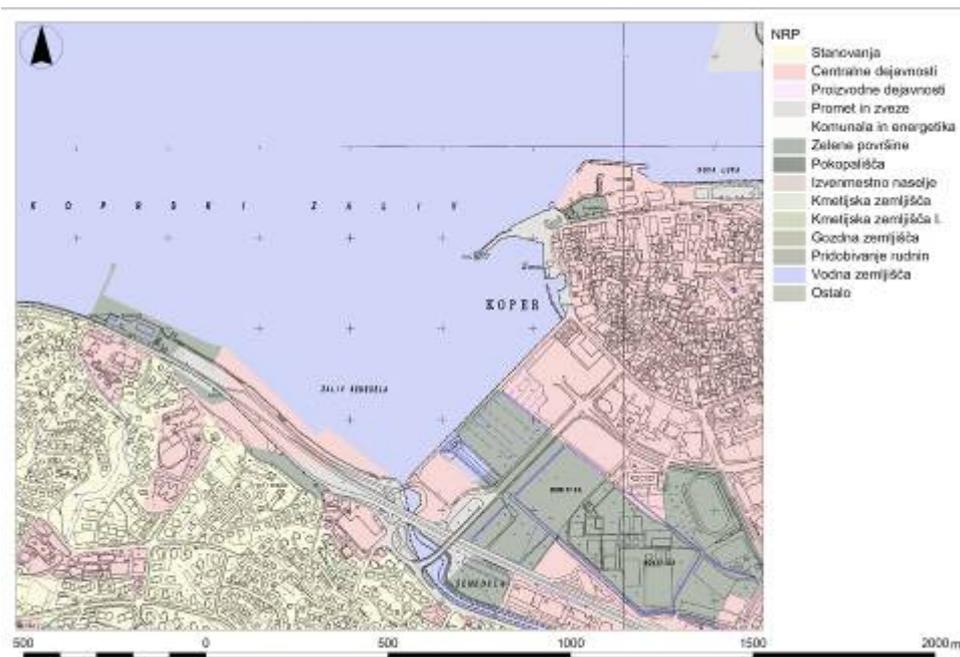
The Municipality of Koper

Key findings, relating to tourism in spatial components of plan acts of M Koper:

- The long-term plan of the municipality of Koper 1986-2000 is still valid and devotes a less important role to tourism. This reflects the past focus on municipality development where tourism did not play a crucial role
- Tourism should base especially on essential bathing offer and other sea activities and should include the offer of direct and slightly remote hinterland.
- The Document emphasizes mostly the coastal area between Ankaran and Lazaret (for developing tourist and apartment residences, youth and student centre and the existing Adria Ankaran hotel complex) and a smaller tourist centre in the area of Žusterna.
- The Document classifies the coast as appropriate for bathing and for tourist and recreational purposes: from the Adria hotel to Lazaret and partly the coast from Žusterna to Ruda in Izola.

Currently, tourism plays a more essential role in the municipality of Koper. Unlike today, tourism development did not enjoy much support in the past.

Chart 2: Eligible use of the coastal strip in the municipality of Koper



- Stanovanja – Accommodation
- Centralne dejavnosti – Central activities
- Proizvodne dejavnosti – production activities
- Promet in zveze – Transport and connections
- Komunala in energetika – Communal and energy sector
- Zelene površine – Green spaces
- Pokopališča – Cemeteries
- Izvenmestna naselja – Non-urban residences
- Kmetijska zemljišča – farming lands
- Kmetijska zemljišča I – Farming lands I
- Gozdna zemljišča – Woodlands
- Pridobivanje rudnin – Mineral extraction
- Vodna zemljišča – Water lands
- Ostalo - Other

A section of spatial plan act components shows that the old town centre, the coast between the historic centre and new urban residences, including traffic area, mostly taken up by the Koper-Izola road, which will be redirected to tunnel, are intended for central activities (including tourism).

At the initiative of the tourist sector, changes and modifications as well as other spatial documents have been drawn up recently. Acts for the following areas are especially significant:

- The coastal area of Ankaran - harmonising eligible use in peripheral areas, establishing a more accurate eligible use, urban and programme directives (urban design, programme designs) for the needs of tourist development.
- The Marina and mooring area near the old town centre: changes of plan acts enable a construction of a marina in Koper with around 600 moorings and their arrangement (around 110 near the mouth of the river Badaševica, 150 near the old mooring in Koper and around 60 in the reconstructed Grande canal). A detailed plan was passed later on for this project.

Chart 3: A proposal of regulatory situation of the marina at the outfall of the Badašica river in the municipality of Koper (P.S. Space)



- Coastal area between Koper and Izola: The document specifies the development of the marina and accompanying activities as well as business tourism in the area of Žusterna, classifying the coastal promenade with additional bathing surfaces, after the withdrawal of the coastal road, the 5 km long area is intended for recreational and tourist activities. A detailed plan was also passed for this project.

Chart 4: Layout design of the Koper-Izola coast (Mediterrana Ltd.)

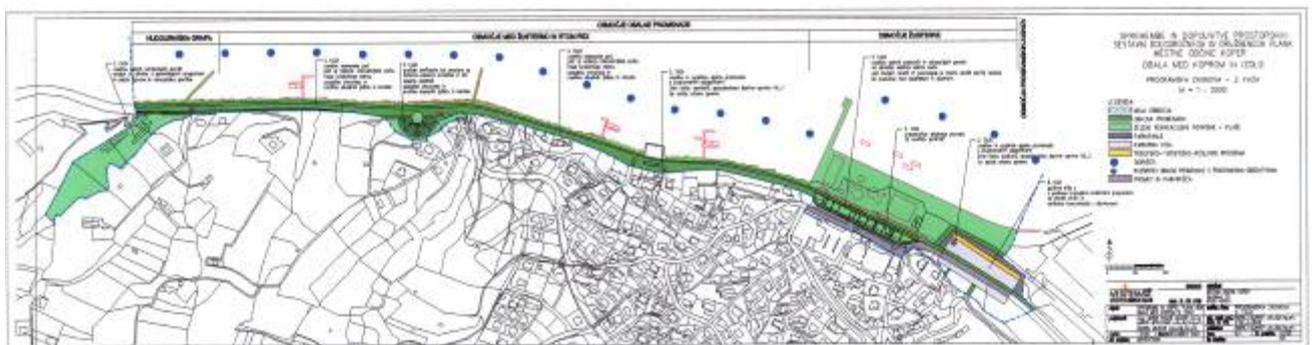


Chart 5: Layout design of the Koper-Izola coast – Spatial display – the area near the Mediterana Ltd. Molet)



In the municipality of Koper numerous initiatives by investors have been raised for the construction of location plans:

- Tourist residence in Valdoltra, residential and holiday facility St. Katarina in Ankaran, Žusterna Tourist complex.

The latter is especially important since it lies between the old town centre and the new residences. It will be intended for tourist activities after the reconstruction of the existing coastal road between Koper and Žusterna. With the tourist programmes just outside the city and a new marina in Koper, tourism in Koper will enjoy new motivation. The foreseen layouts are a reconstruction of the beach in Žusterna, building a hotel with a parking house and accompanying programme near the cliff next to the planned marina.

Chart 6: A possible solution of the cliff hotel in Žusterna

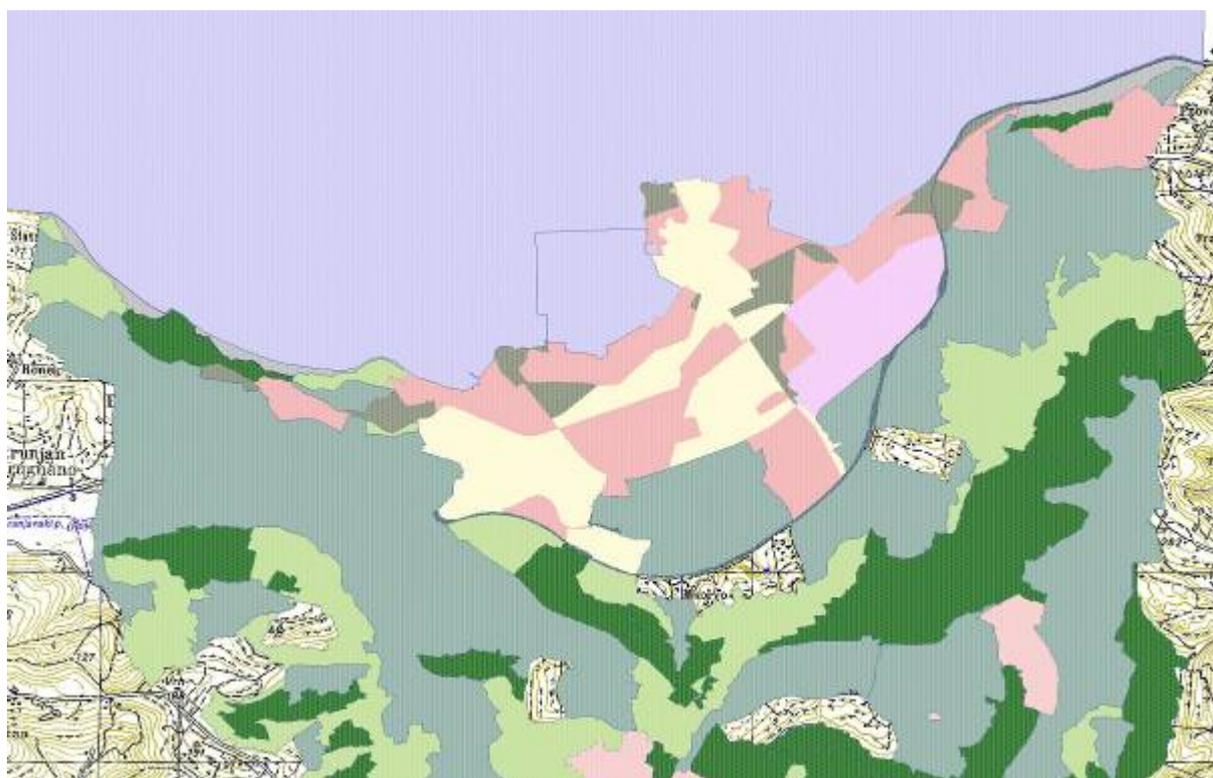


The Municipality of Izola

Key findings relating to tourism in plan act spatial components of the municipality of Izola:

- In plan act spatial components of the municipality tourism plays a significant role
- Central activities (one of them also being tourism) are marked with dark pink on the chart below. Coastal areas such as Belvedere, Simonov zaliv, the Marina, Punta and Jadranka autocamp are especially intended for central activities.
- Surfaces in the East of Izola, mostly intended for shipbuilding will be intended for tourism and central activities in the future.
- A national development project "Adriatic island" is also planned in the East part of Izola. It will be intended for tourist and entertainment infrastructure.

Chart 7: Plan act spatial components of the municipality of Izola (Eligible use of space)



Recently, the municipality of Izola has also seen changes and modifications in plan acts at the initiative of the tourist sector:

- In the coastal area between Koper and Izola (with contact surfaces of the hospital) the Document enables a construction of a promenade, additional bathing surfaces, and after redirection of the coastal road the entire area is intended for recreational and tourist activities (connection to similar arrangement in the municipality of Koper). A jetty – "an island" is intended for recreational and tourist activities (instead of this a reconstruction of the island between 2007 and 2023 is intended in accordance with the already mentioned *Resolution on National Development Projects of Republic of Slovenia for the Period 2007 – 2023*).

Chart 8: Technical basis for plan act spatial components of the municipality of Izola



- For the area of Izola marine: modification of the additional pear in new (communal and daily) moorings.
- For the area of Simonov zaliv: expanding the accommodation capabilities and modifying sports, recreational and green surfaces – park. An advanced modifying plan was also prepared for this area.

At the initiative of the tourist sector some location plans such as Belvedere and the area of Delfin hotel have been approved in the municipality of Izola recently. The item of mentioned acts are spatial arrangements and construction, related to the tourist offer and also construction and reconstruction of communal and transport infrastructure as well as sports and recreational surfaces.

Chart 9: Belvedere location plan: arrangement layout (P.S. Space)

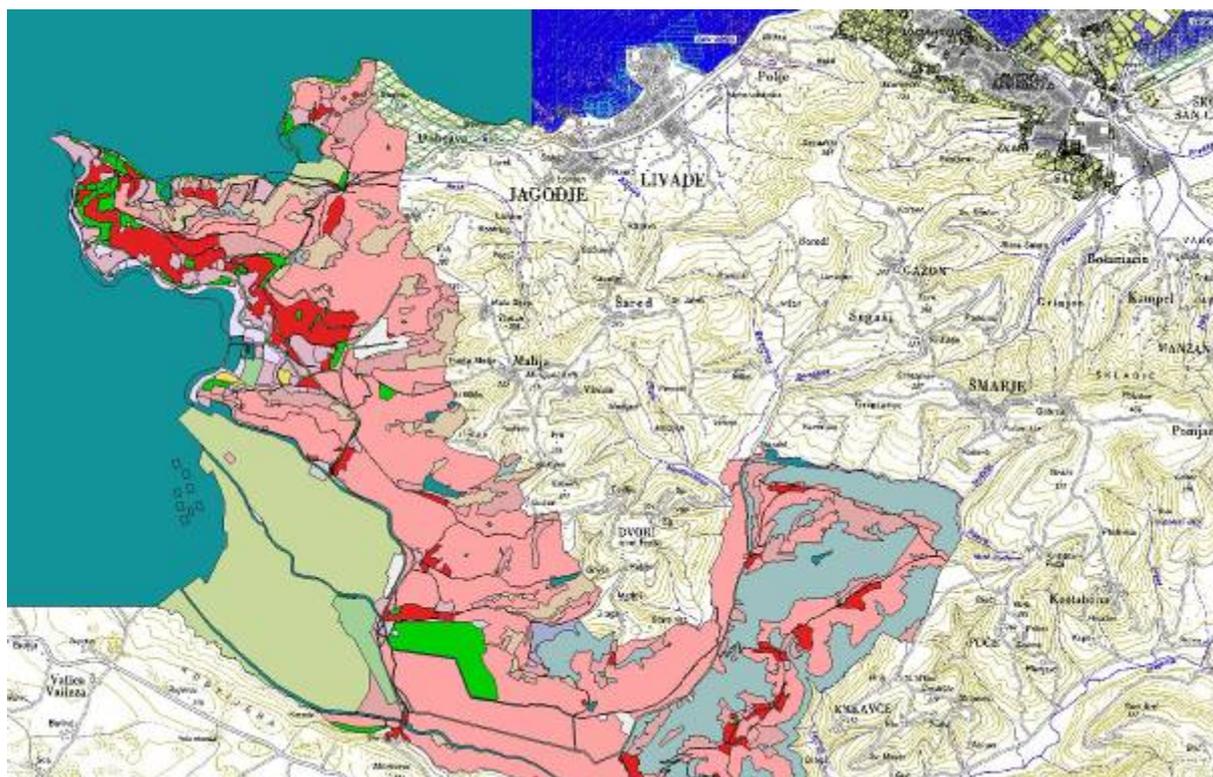


The Municipality of Piran

Key findings relating to tourism in plan act spatial components of the municipality of Piran:

- Tourism plays a vital role in plan act spatial components of the municipality as it is its main activity also on a national level
- Virtually all surfaces along the coast between Seča-Lucija and Piran as well as Fiesa and Strunjan are intended for tourism

Chart 10: Plan act spatial components of the municipality of Piran: (eligible use of space)

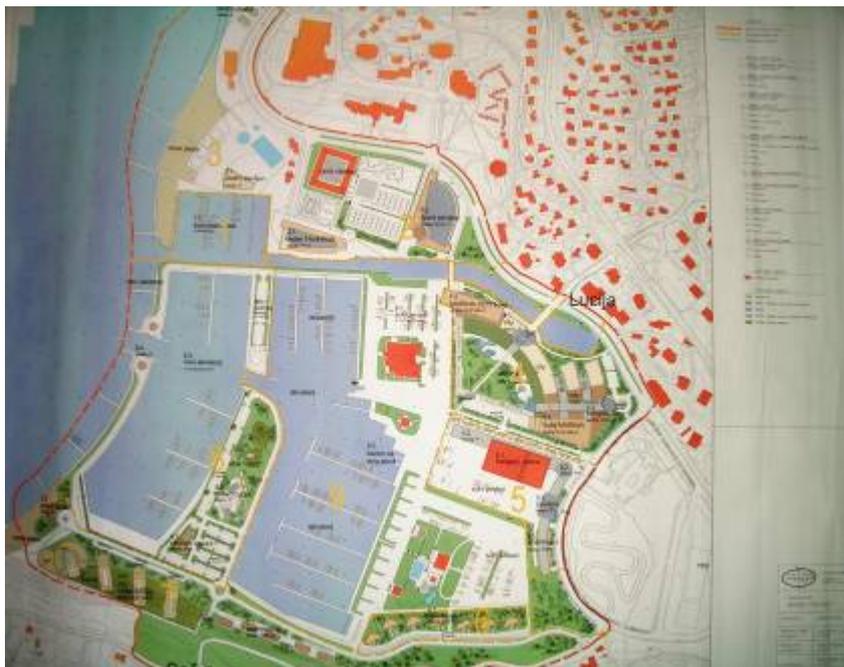


Recently, the municipality of Piran has also seen changes and modifications in plan acts and detailed plans at the initiative of the tourist sector:

Changes of municipal plans in 2004 represent minor expansion of eligible use of space intended for tourism. Detailed plans, which enable the implementation of some key tourist projects:

- Piranska vrata detailed plan: A construction of a large parking garage with the capacity up to 2070 parking spaces is intended. It will be leaned on a cliff and partially entrenched which will relieve the old town centre of traffic and enable the modification of Bernardin hotels on the way to Piran. Modification of public beach as public surface.
- Marina Portorož detailed plan: An extension of marina capacities on sea and shore is intended.

Chart 11: Portorož marina detailed plan: spatial layout (PIP – Projektiva inženiring Piran)



- Hotel Palace detailed plan: A reconstruction and extension of the old Palace hotel, modification of park surfaces, transport infrastructure, parking facility construction, extention/substitute construction of the existing residential facilities.

Chart 12: The area of hotel Palace detailed plan



- Seča – Seča detailed plan - peninsula

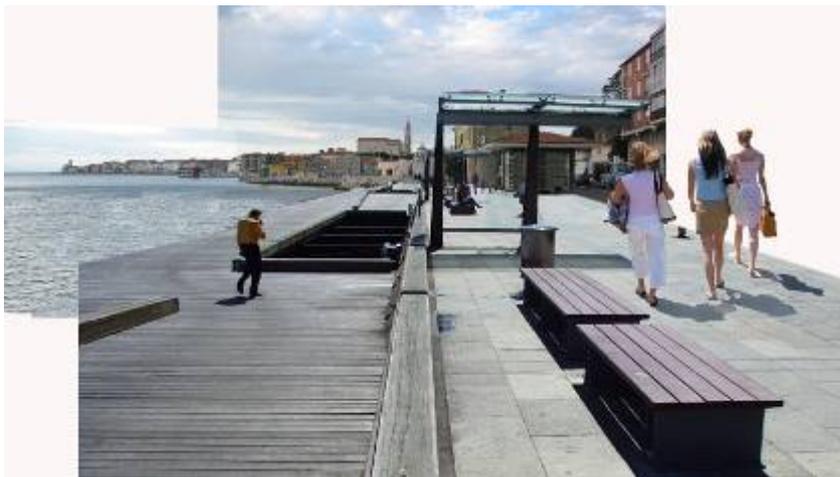
The act foresees a graveling along the Seča peninsula: beach modification on the macadamization under the cliff, walkways and bicycle tracks, peers, sea accessibility for bathers, beaches for children, swimming pool and four beach features; infrastructure modification for display of exhibition of Forma viva sculptures, road and parking space modification, new hotel tourist programme, peer and mooring installation for vessels along the Jernej canal.

- Concept modifications of public surfaces along the Piran coastal strip

A study with a concept project to modify public surfaces in the Piran coastal strip was created with the purpose to connect individual projects in the field of space modifying of

the Piran municipality, co-financed by the Ministry of the Economy (tourism). Project objectives were to ensure public surfaces for sustainable development, ensure the priority of public interest modifications, sufficient pedestrian surfaces for unrestricted movement – walks, and transport limitation on the coast.

Chart 13: Concept modifications of public surfaces along the Piran coastal strip (Urbi Ltd)



Conclusions

- In the area of coastal municipalities spatial plan acts mostly created at the end of 1980s still apply
- Due to new tourist investment initiatives they have been changed or modified a number of times in accordance with investors' needs and prescribed limitations
- The majority of investment initiatives in the last decade are focused on the areas which were created in the plan acts two decades ago and intended for settlement: settlement thickening and reurbanization (a change of intended purpose of the surfaces, intended for production activities on attractive locations along the coastal strip)
- The majority of new investment initiatives (accommodation capacities, marinas, recreational activities) are still focused on the vicinity of the coastal strip
- Recently, a vast interest for creating tourist apartments has been detected – construction for the market, preferably in the vicinity of the coast or with a sea view

- Due to a large increase in beach programmes the issue of transport burdens has strained
- In accordance with increased interest for tourist investments, the issue on strategic spatial directives for the future development of tourism, which will be the purpose of the new municipal spatial plans, has fine-tuned. The municipalities will prepare it in the next two years
- The new generation of spatial plans will mainly have to resolve the following issues:
 - Create instruments for an even spatial distribution of tourist activity on a regional level
 - Create a balance between urbanized and non-urbanized part of the coast according to sustainable development, nature preservation and biodiversity, natural resources, cultural heritage and landscape values. It is necessary to prevent the spread of urbanization to non-urbanized parts of the coast and ensure enough width (at least 200 m)
 - Reconstruction of the coastal strip use: ensuring the control of traffic and parking spaces as well as any activities which are not in accordance with the exceptional value of the coast
 - Rehabilitate the coastal strip by creating a »coastal promenade« along the whole coastal strip as basic infrastructure.

2.7 The State of Tourist Destination Management

The problem of tourism organisation occurs everywhere, where tourism is being developed. This is the result of a simple fact, that there is a vast number of smaller tourism service providers and that the public, private and civil interests in tourism intertwine, which means that the representatives of the authority, economy and associations, as well as the local population come across each other. Besides that, tourism is not a homogenous activity, but it is rather composed and spread among several areas of economic activities and the activities of general and common interest.⁴

There are three local tourism organisations in Slovenian Istria with clearly defined responsibilities and objectives. The most important activities are: uniting tourism service providers, providing information, promotion and marketing, and event organisation.

The tourism organisation in Koper is not an independent legal entity. It operates in the framework of the local community, whereas TGZ Izola (i.e. Economic Tourist Association Izola) and Tourist Association Portorož are independent legal entities or economic interest associations, whose members are representatives of the public, private and civil sector. Tourist information centres also operate in certain places in the framework of the mentioned organisations.

Besides the aforementioned organisations and local community, the key players in the tourism development are especially bigger hotel companies. Private sector holds a great number of smaller tourism service providers, mainly in the field of catering and small accommodations (room renters, etc.). In the public sector, besides the aforementioned organisations and local community, sport and culture associations are also included in the development promotion, mainly as the facility operators. Tourist and other associations also actively participate in the field of uniting and informing the local

⁴ Source: adapted from Tourism Development Strategy in the Municipality of Koper for 2002-2006 with Long-Term Directives until 2020, the proposal of Final Report, Ljubljana, 2002 (original title: Strategija razvoja turizma v mestni občini Koper za obdobje 2002-2006 z dolgoročnimi usmeritvami do leta 2020, predlog končnega poročila, Ljubljana, 2002)

community and organising different activities for environment embellishment and especially in organising events and other happenings.

There are no local tourism organisations established in the Karst area. The development and the promotion of tourism are dealt with by the local development agencies, which are public institutions; the activity of tourism is dealt with mostly by the municipal departments of economic and social activities. The main responsibility of those organisations is the project development and the development of new integral tourism products.

The information activity for all Karst municipalities is carried out by the Tourist Information Centre in Sežana, and, on their one initiative, also by the Škocjan Caves, Štanjel and Lipica. The promotional activities are--also on their own initiative--entirely carried out by the Škocjan Caves. In the field of event organisation and other happenings numerous tourist and other associations actively participate. In Sežana, the Sport Institute has been established, which not only informs the community but also organises numerous sport recreational events. The main developers are the Škocjan Caves, which are on the UNESCO list of World Heritage Sites, and partially Štanjel and the public institute Lipica Stud Farm. In the Karst region there are also several small tourism service providers, mainly in the field of catering industry and farm tourism.

A great number of small traders and businesses operate in the area of Ilirska Bistrica. The central uniting and promoting organisation is the public institute Razvojni center (i.e. Development Centre) and the tourism promotion centre with the tourist information centre.

The key challenges in the field of tourism organisation and management are:

- larger connection, concentration and centralization of common development, promotion and other activities
- specialisation of organisation for the achievement of better effects and quality improvement in the development and promotion activities for a comprehensive tourism development in the entire area of South Primorska
- the transfer of information and knowledge between participating organisations
- a more explicit distribution of competence and responsibility among participating organisations
- the invigoration of development and promotional role of tourism
- the abolishment of weaknesses occurred by the dispersed, uncoordinated and non-strategic operation of organisations responsible for different activities in tourism management
- the invigoration of partnership between the public and private sector in planning, development and marketing

2.8 Trends in Supply and Demand and in Marketing

The key development and marketing factors, which have and will influence the development of tourism industry in the years to come, relate to: demographic and cultural changes, global political and economic influences on the local scale, changes in the way of life, telecommunication and other technological development trends correlating to globalisation processes and the increase of mobility.

Trends in the development of tourism are aiming towards **ensuring security of tourists and satisfying emotional and spiritual needs, as well as fulfilling the needs occurring from demographic and technological changes.** The era of information technology and technology revolution has been changing into the era of adventures and fantasy realisation--into the so called "**Dream Society**". Tourists' main desires are **action and experiences.** The aforementioned also results in the growth of inquiry for **authentic experiences which include getting to know about new cultures,**

experiencing nature in its entirety, educating and being conscious of environmental protection as well as **permanently preserving the tourist experience.**

The main characteristics of trends, which influence the tourism development around the world and the needs of the adaptation to the changes:

- Changed demographic structure, which is the result of and/or results in:
 - ageing of the population - tourists and tourism employees
 - health and wellness have become the main values
 - the change of family dynamics
 - the need of work and free-time balance
 - the consumer's higher education
- "Back to the nature" trend and the increase of the demand for ecological tourism products
- Cheaper, shorter and more adventurous and active holidays
- The increase of individual travels and business tourism
- The increase of travel expenses
- Distinctive season fluctuations
- Specialised and educational travels
- The maximisation of pleasure in minimal time
- (Tele)communication and accessibility provide higher mobility
- The increase in the use of electronic media in last minute reservations
- Concern for safety, natural disasters, wars
- Trends in tourism demand and supply:
 - an increase in the length of holiday season
 - an increase in competitiveness between Adriatic coastal destinations (product competitiveness, service quality and pricing)
 - holiday resorts are obliged to ensure appropriate infrastructure to protect the beaches and coastal region, and the roads and accesses to assure the quality of environment
 - there have been changes in marketing conditions - sophisticated tourists use innovative methods to acquire information, to make reservations and distribution, that is why the operator's relation to the guest is of the key importance and it can be achieved with retention and repeat purchase policy
 - a larger offer diversity
 - due to social dimensions and required large investments and training there has been an increase in the public sector participation in tourism
 - continuous improvements in staff's skills and training
 - "slow places" and "slow food" have spread throughout Europe
 - new ways of marketing and influencing the purchasing habits of consumers/tourists
- New ways of marketing and influencing the purchasing habits of consumers/tourists.

Special challenges in marketing are:

- a) **hybrid tourists** (the tourists, who combine a high quality accommodation with a low-budget travel, fast food with culinary delights, etc.); market defies the traditional segmentation; independent holidays are overtaking package offers;
- b) **greater adaptation and flexibility of market activities** (*there is no longer only one method for a certain segment*), the supply adapts to individual particularities/wishes, which are of a mass extent; a tourism service provider needs to balance guest's satisfaction and profit (a multitude of individual offers)
- c) **cross marketing of products and sub-regions**
 - the influence of media and pop culture is coming back

- the market is more and more segmented, that is why there is an increase in the tourism for singles and seniors
 - the market of family holidays is still at the standstill
 - X, Y, Z and 0 generations (those born in the 70s, 80s, 90s and in the new millennium) who have grown up using computers, mass media and having different values, are representing a challenge for tourism employees
 - the enlargement of the new markets of the EU (after the 10 new member states joined the EU in 2004, the population increased 20 % to 460 million)
 - a significant increase of Russian and Asian tourists in Europe
 - travel expenses are decreasing (an increase in the number of low-cost airlines)
- d) **marketing of the new forms of tourism, which differs from the classic marketing**

2.9 Participants' Interests in the Development of Tourism

PARTICIPANT'S INTERESTS IN THE DEVELOPMENT OF TOURISM

GUESTS	TOURISM SERVICE PROVIDERS	LOCAL COMMUNITIES	SOCIAL AND CULTURAL ENVIRONMENT	NATURAL ENVIRONMENT
<ul style="list-style-type: none"> - authenticity of environment and offer - satisfaction - fulfilment of wishes and the satisfaction of needs and anticipated benefits of different segments of demand - good information about destination offers and appropriate orientation and information system 	<ul style="list-style-type: none"> - new investment opportunities - an increase in income and realization of profit - incentive business environment - competitiveness of offers and pricing - trained and properly educated workforce - all-year and variegated offer of tours, programmes / products - management - creation and marketing of tourism products and different programmes with the partnership approach between public and private sector 	<ul style="list-style-type: none"> - regulated public infrastructure and environment - low rate of unemployment - reasonable exploitation of local resources - positive fiscal effects - planned, adjusted and balanced spatial development - economic growth and regional development - management, creation and marketing of products with partnership approach between public and private sector 	<ul style="list-style-type: none"> - alluring workplace - confidence of local community into development possibilities of tourism - preservation and stimulation of regional identity - revival and preservation of cultural landscape and cultural heritage - revival of events and attractiveness of the region - improvement of negative demographic trend due to perceived business opportunities and good possibilities 	<ul style="list-style-type: none"> - preservation of natural heritage in accordance with the principles of sustainable tourism development and demands in protected areas - effective rehabilitation and minimisation of consequences of possible larger natural disasters

COMMON INTERESTS OF ALL THE PARTICIPANTS IN TOURISM ARE:

- | | |
|---|---|
| <ul style="list-style-type: none"> - conservation of regional authenticity with a simultaneous propulsive but sustainable development - long-term international competitiveness of destination in selected markets throughout the year - partnership approach in the creation and execution of sustainable tourism development | <ul style="list-style-type: none"> increase of quality increase of revenue development maintenance |
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2.10 SWOT Analysis

STRENGTHS

SLOVENIAN ISTRRA	KARST WITH BRKINI
<ul style="list-style-type: none"> • Favourable geographical position • Easy accessibility, good traffic connections (motorway, railway) • Great regional diversity and favourable climate • Proximity of emitive markets (Italy, Croatia) • Rich natural and cultural heritage with protected areas • Tradition and potential for co-natural development • Developed economical, social and intellectual hinterland • Relatively well developed tourism offer 	

SLOVENIAN ISTRRA	KARST WITH BRKINI
<ul style="list-style-type: none"> • Tourism tradition and developed tourism throughout the coastal region • Concentration if tourism offer in a smaller region • Airport in Sečovelje • Developed offer, not included in full or half board (sport and recreation, entertainment and other events) • Established local tourism organisation (based on the municipal principal) • Joint promotion and marketing of tourist destinations • Immense variety and diversity of offer, development of sport and youth tourism according to the spatial possibilities, education courses • The coast as a starting point of the Adriatic Sea for Central Europe • Availability of event infrastructure (Avditorij, tennis centre Lucija) and petty exploitation 	<ul style="list-style-type: none"> • Immense natural resources • Natural resources for development of excursion tourism • Tradition (handicraft products, culture, cuisine, etc.) and possibility of creating thematic tourism programmes • Conditions for ecological agriculture • Hospitality of local population • Tradition of sport tourism in all seasons, offering different recreational programmes • Škocjan Caves and Lipica Stud Farm have an important role in creating attractive offer throughout the year • Activities of tourist societies • Bigger interest of individuals in setting up accommodation capacities (holiday farms, private accommodations and apartments) • Real Estate prices are relatively low and thus acceptable for developing small accommodation facilities • Favourable climate, which offers the development of wellness and other tourism products • Low density of population

WEAKNESSES

SLOVENIAN ISTRRA	KARST WITH BRKINI
<ul style="list-style-type: none"> • No regional tourism development strategy • Irregular development • Insignificant cooperation among public, private and civil sectors, no connection and lack of coordination between the subjects in tourism • Despite existing local tourism organisations there is no real connection for organised appearance • Unconnected and non-aggressive joint marketing; lack of financial means 	

- Inappropriate structure of accommodation capacities (not enough private accommodations and apartments, boarding houses, small family hotels, holiday farms)
- Insufficient tourist signalisation
- Shortage of qualified staff and transfer of modern knowledge into tourism
- Poorly developed enterprise and small businesses
- Not enough authentic commercial offer (authentic souvenirs)
- Poorly developed public passenger transport
- Road accessibility, programme availability
- Poor encouragement of the youth to comprehend tourism as a way of life
- Local population does not accept the way of life typical of tourist destinations (night life, etc.) and on the other hand lack of understanding of the catering businesses towards local population
- Existing administrative ways of acquiring development means (calls for tenders, public contracts) are too complicated for potential users

SLOVENIAN ISTRRA	KARST WITH BRKINI
<ul style="list-style-type: none"> • Unbalanced spatial plan and development potentials/needs for tourism • Not enough and poorly maintained beaches • Poorly developed maritime traffic • Marines • Traffic jams during season months and holidays • Old town centres are dying away (with the exception of Piran) • Lack of tourism products for the prolongation of the tourist season and insufficient inclusion of the Karst region into the tourism offer • Unexploited possibilities of offering and marketing the so called "green" and "blue" sports out of main season • Poor coordination between organisers and poor marketing of entertainment and other events • Irregular development of the coastal area, poor local connections • Closeness of discordant and disturbing activities in the coastal region (Port of Koper, shipbuilding yard) • High rate of unemployment which results in the need of appropriate regional economic drive • Unfavourable ownership structure of finance in tourism, which results in the fact that the majority of tourism profit does not make a fortune for the region 	<ul style="list-style-type: none"> • Negative demographic movement, ageing population • Relatively low degree of education • Rare settlement • Inappropriate personnel policy • Poor and out-of-date tourism infrastructure • Lack of tourist information points • Insufficiently developed basic and complementary tourism offer, which prevents valorisation of natural and cultural resources • Not enough accommodation facilities • No elaborate development countryside programmes and tourism development strategies on a local scale • Lack of investment means, absence of capital • Passiveness of local inhabitants in the realisation of possible offers and developing ideas • Not enough appropriate recreational sports infrastructure • Inconvenient road connections with Ilirska Bistrica

<ul style="list-style-type: none"> • Poor agriculture, also due to low technology level, which is the result of unfavourable relief (small parcels of land, sloping plots of ground, little water, etc.) • The coastal region has no forest, mining resources 	
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OPPORTUNITIES

SLOVENIAN ISTR	KARST WITH BRKINI
<ul style="list-style-type: none"> • Proximity of the borders (Italy and Croatia), possibility of the development of joint tourism programmes, cross-border collaboration • Open border with Italy • Joint marketing of tourism products of the coastal region, inclusion of tradition and craft into the tourism offer • Increase of municipal funds for the development of tourism, possibility of acquiring EU funds • Positive cooperation between the public, private and civil sectors, integration of tourism service providers • Trademark development of protected natural and cultural sights and areas • Development of small and quality accommodation facilities • Development of lacking tourism infrastructure (theme tours and other offers, not included in full or half board) • Adjusted development of agriculture, fishing industry, wine growing and wine trade, olive-growing and fruit cultivation • Constant growth of demand, increase in the number of short travels • Enterprise and small businesses' promotion • Connection between domestic and foreign strategic partners • Rapid growth of demand for quality and complete offer • System for the encouragement of qualified, educated and satisfied personnel in tourism • Temporal and spatial arrangement of tourism programmes and activities • Mutual combination of coast and hinterland, creation of specific tourism programmes • New specific target groups • Development of all-year tourism by developing complementary activities • Use of renovation of old Palace Hotel as the "icon of Piran's or regional tourism" 	

SLOVENIAN ISTR	KARST WITH BRKINI
<ul style="list-style-type: none"> • Construction of a fast local road with a tunnel between Koper and Izola • Cooperation with neighbouring municipalities of South Primorska • Development of sea passenger transport • Development of Koper University centre • Planning and development of Mediterranean climatic sun park "Ankaran - Debeli Rtič - Jernejev 	<ul style="list-style-type: none"> • Strategic location (border with Croatia) and an increase in the transit to Kvarner and Dalmatia and also the possibility of creating offer accommodated to transit guests • Demand trends in the direction of new destinations by emphasizing sustainable tourism development (ecology awareness, environment preservation and protection of flora and fauna) • Karst phenomena as basis for offer

<p>zaliv"</p> <ul style="list-style-type: none"> • Regulation and development of coastal areas • Development of marines • Adjusted development of public utility and other public infrastructure • Further development of passenger transport (land, sea and air) • Incorporation and active cooperation in broader projects (old town centres) • Connection of offer not included in full or half board • New passenger terminal – an international maritime traffic centre, correspondence to sea connections • Trade port, upgraded with a traffic logistics terminal may represent a great potential for tourism development. 	<p>creation</p> <ul style="list-style-type: none"> • Increasing demand for organic food production • Changes of population's habits and preparedness for changes • Trend of demand for adventurous and actively spent free-time to form tourism products based on the "active nature experience" theme • Possibility of forming different tourism products regarding the characteristics of particular season • Economic development and formation of new workplaces • Possibility of the development of recreational tourism, wellness in the countryside, etc. • Further development of the catering industry • Tourism development results in the accelerated development of supplementary activities on farms • Landscape revival (overgrowth due to abandonment of agricultural activities) • Exploitation of existing biomass, encouragement to use retrievable energy sources in tourism • Airfield in the Karst (Gaber airfield)
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THREATS

SLOVENIAN ISTRRA	KARST WITH BRKINI
<ul style="list-style-type: none"> • Falling behind in the development of modern traffic and communication connections (disconnectedness of municipalities in the region) • Danger of larger environmental pollution • Shortage of drinking water • Absence of investor stimulations, low taxes, favourable rents and prices of land equipped with public utilities, kind and effective general public service, etc.) • Inability to exploit the EU funds and the state budget • Conflicting interests in terms of spatial usage and inconsideration of sustainable tourism development demands • Disinterest of domestic public for the development • Not enough interest for investments in the region • Inconsideration of development tourist trends • Unconnected marketing and promotion, absence of cooperation between all three sectors 	

SLOVENIAN ISTRRA	KARST WITH BRKINI
<ul style="list-style-type: none"> • Threat and revitalisation in the revitalisation of the old town centres • Limited use of sea, coast and coastal area for domestic population due to tourism development • Limited use of coast and coastal areas due to hotel and other guests • Overburdened environment due to (too) intense tourism development • Development of public utility infrastructure (traffic, water and public utility infrastructure development, etc.) will not follow the tourism development, which could lead to lower quality of life among the local population and to environmental pollution; • Resistance of local population against further development of certain kinds of tourism (particularly attracting "one-day" guests); 	<ul style="list-style-type: none"> • Better chances in the area of education and employment in bigger coastal towns and in Ljubljana • Region protection with the Natura 2000 (EU) programme which prevents greater environment interventions • Water-collecting areas

2.11 The Starting Points of Sustainable Tourism Development

The Guidance Criteria of the World Tourism Organisation considered by this strategy

There are 12 aims of sustainable tourism development set up by the World Tourism Organisation

1. Economic Possibilities

To ensure economic vitality and competitiveness of destinations and businesses in such a way that they result in success and long term benefits.

2. Local Well-Being

To maximise tourism contribution to the economic well-being of the destination, including the return of the part of the guests' consumption share to the community.

3. Quality Workplaces

To reinforce the number and quality of workplaces in tourism, including the scale of the salaries, favourable work conditions, and availability of workplaces for everyone without discrimination based upon gender, race, abilities or other.

4. Social Capital

To distribute economic and social benefits of tourism extensively and rightfully to local community, and to include the possibilities, income and services for the poorer.

5. Guests' Satisfaction

To ensure safe, satisfying and favourable experiences for all guests without discrimination based upon gender, race, abilities or other.

6. Local Supervision

To include local communities in planning and decision making about the future management and development of tourism in the area and in cooperation with other participants.

7. Community Well-Being

To sustain and strengthen the quality of life in the local community, including the social structures and the accessibility of resources, goods and support system. To avoid any form of social degradation and exploitation.

8. Cultural Heritage

To respect and support cultural heritage, authentic culture, traditions and community's particularities.

9. Physical Integrity

To maintain and strengthen the quality of urban and rural environment and to avoid physical and visual degradation of environment.

10. Biological Diversity

To support the protection of natural areas, habitats and wilderness and to minimise the damage caused.

11. Resource Efficiency

To minimise the use of rare and non-renewable resources in the development and management of tourism facilities and services.

12. Environmental Purity

To minimise air, water and soil pollution and the production of waste by tourism businesses and guests.

The Recommendations of Mediterranean Commission for Sustainable Development (MCSD)

The recommendations and propositions established by the Mediterranean Commission for Sustainable Development (MCSD) adopted at the meeting of parties from 1999 Barcelona Convention

The following recommendations are of exceptional importance for the purpose of CAMP Slovenia Project.

1. THE SUPERVISION OF TERRITORIAL AND ENVIRONMENTAL INFLUENCE OF TOURISM

To expect and to decrease the negative influence of development results, urbanisation and tourism infrastructures in the coastal regions

- to provide necessary instruments to estimate the influence of tourism programmes and extensive projects on the environment,
- to carry out the assessment of destination location's carrying capacity and to perform appropriate measures to ensure that the supply is in accordance with the carrying capacity,
- to reinforce or reinstate legislative tools, regulations and real-estate management, which leads to tourist urbanisation supervision and protection of the most valuable natural areas,
- to carry out the programmes, which allow rehabilitation of "ripe" destination areas inclined to the environment,
- to carry out the mechanisms, which allow (where possible) financial contribution from the tourism sector for the protection and management with natural and cultural regions.

To decrease natural resources consumption and to decrease pollution caused by tourist accommodations and activities

- to ensure good environmental management of tourist facilities and destination locations,
- to stimulate quality environmental procedures (certification, charters, etc.) with possible regional financial support,
- to develop all means which may result in the expansion of tourist season throughout the year,
- to stimulate the tourism sector:
 - to withstand the waste and pollution in aquatic areas, the energetic waste and other refuse,
 - to stimulate clean and innovative technology,
 - to stimulate and execute the certification processes (EMAS, ISO 14000, etc.).

The supervision of free-time tourist activities, which influence the sea and coastal environment

The execution of the following steps so that:

- the excursion ships do not dispose of their waste when anchoring or when staying at ports,
- the yacht piers are equipped with the necessary facilities and solid and liquid waste collection devices,
- the new ways of free-time spending, which may influence the environment, will be approved only after their influence has been estimated and will be proven that they are in accordance with tourism strategies of the respective regions,
- the access to and the use of the beaches by the public and the experts will be regulated and managed in accordance with the environmental factors if necessary.

2. TO STIMULATE THE TOURISM AS A FACTOR IN SUSTAINABLE SOCIAL, CULTURAL AND ECONOMIC DEVELOPMENT

The development of national and local strategies for a more adjusted tourism, environment and sustainable development

- to develop and reinforce immersed confrontational/negotiatory methods among the authorities responsible for tourism, environment and regional development and responsible players
- to develop these strategies particularly by relying on the observation of tourism influence (on economy, environment and cultural heritage), elaboration of perspective activities for mid- and long-term period and the selection of appropriate indicators
- to try to mobilize local population, nongovernmental organisations and primary experts with tourist destinations and execute local Agenda 21.

Recommendations

- to stimulate the development of cultural, ecological and farm tourism, which is compatible with the environment. The emphasis of archaeological, historical, architectural, provincial and natural heritage can be strong investor and should therefore be well developed.
- to investigate the complementariness and synergy with other economic sectors, particularly with agriculture, fishing industry and craft trade,
- to develop synergies between the coastal and continental tourism,
- to execute specific action programmes, which are adjusted to sustainable development, especially those of sensitive areas on ecological and human scale, particularly on the islands, hinterlands and wetlands,
- to develop appropriate tools to achieve these aims, such as biosphere reserves and natural parks, and the processes of the number of local Agendas 21, so that they are supplied with sufficient financial funds and technical assistance.

To stimulate tourism diversity and balanced regional development

Mediterranean countries and local authorities should strive to:

- stimulate the development of cultural, ecological and rural tourism compatible with the environment. The emphasis of archaeological, historical, architectural, provincial and natural heritage can be strong investor and should therefore be well developed.
- investigate the complementariness and synergy with other economic sectors, particularly with agriculture, fishing industry and craft trade,
- develop synergies between the coastal and continental tourism,
- execute specific action programmes, which are adjusted to sustainable development, especially those of sensitive areas on ecological and human scale, particularly on the islands, hinterlands and wetlands,
- develop appropriate tools to achieve these aims, such as biosphere reserves and natural parks, and the processes of the number of local Agendas 21, so that they are supplied with sufficient financial funds and technical assistance.

3. TO DEVELOP MEDITERRANEAN COOPERATION

Barcelona Convention parties, including the MAP (Mediterranean Action Plan) , tourism experts and nongovernmental organisations should:

- reinforce the activities of getting the message across in the regional dimension and in tourist destinations, as well as in the countries of origin,
- organise the experience sharing between the players involved in tourist destinations of different countries,
- develop the training programmes between the players involved, particularly between local authorities and experts,

- stimulate the execution of Mediterranean networks (among experts, among particular areas, such as the islands, or certain types of tourism, such as cultural diversity, etc.),
- stimulate the implementation of Mediterranean signs for environment,
- stimulate the "regional cooperation mechanism" in the area, which works in the network.

The Guidelines of the Commission of the European Community for Sustainable Development of Tourism

The European Commission strives to reinforce the policies and initiatives for the sustainable tourism development and for the enforcement of the provisions for stimulation of sustainable principles in tourism of the European Community in the following fields³:

- sustainable activities and the increase in tourism quality

Competitiveness of tourism businesses and tourist destinations requires efficiency, from which sustainability is paid, so that the optimum incomes are achieved. In return, the financial funds needed for the efficiency are reinvested in the quality of workforce, consideration of local community interests and the decrease of tourism impact on the environment.

- balanced approach to three sets of sustainability

Sustainable tourism development assures an economic and business success, environment preservation, protection and development, and responsibility to social and cultural values. Multiple partnership solutions offer possibilities to dismiss disparities between different participants' practices.

- sustainable demand patterns

Adequate tourist informing will gradually result in sustainable reflection, which will influence the demand patterns and changes in provided services. This includes quality as an integral part of offer and new approach of customer understanding, that quality and sustainability have their price.

- sustainable offer patterns

a) sustainable value chain

The sector needs to assess the socioeconomic and environmental expenses to make prices. The sector needs to start with the implementation of the concept of social responsibility, which incorporates studying, good payment for qualified and motivated employees for quality assurance, certification systems for promotion of sustainable demand and supply, and integration of new technologies, where possible.

b) sustainable destination development

³ Basic orientations for the sustainability of the European tourism, Commission of the European Communities, Communication from the Commission to the Council, the European Parliament, the European Economic and Social committee and the Committee of the Regions (SEC 2003, 1295)

Prudent spatial utilisation is of the key importance. Competitive high quality tourism **needs to consider the carrying capacity of natural and cultural space.**

This includes the phenomenon of second and third home in tourist destinations and one day visits, which may in some cases, exceed the tourism activity. Such visitors and the pressures for urbanisation of valuable space, increase the need for tourism resources, transport infrastructure and tourist services, except for the accommodation. Furthermore, the competitiveness of European tourism demands the preservation of regional peculiarities and diversity as competitive advantages in simultaneous assurance of the quality of visit and stay, which inter alia demands the care for the preservation of natural and cultural values and the return of tourism profit back to the destinations.

III. THE ASSESSMENT OF CARRYING CAPACITIES

Timely and comprehensive spatial planning, which places the activities that affect the environment and have been planned by the strategies, is of the key importance for planned implementation of sustainable tourism development. In spatial planning--similar to the strategy development and the vision of development--it is necessary to assure the cooperation of the representatives of tourism and other branches of economy, as well as the experts from different fields, the local population and the local and state administration. The aforementioned participants namely mutually reconcile their interests in the process of spatial planning document adoption, in which they take into consideration previously conducted analyses of carrying capacity of the space for different activities.

The assessment of carrying capacity relates mainly to the coastal region, which is the most endangered due to location attractiveness, development tendencies and tourist visits in that particular area.

Spatial-Ecologic Indicators

3.1 Beaches

The beach capacity has been assessed as **not sustainable**. The upper verge of the standard 10 sq m per bather has been already exceeded, whereas the lower verge (6 sq m per bather) will not be exceeded even if there is a 30 % increase in the accommodation capacities by the year 2020. During the bathing season it has already been necessary to restraint the crowd on the most popular beaches. In some places this has been achieved by charging the entrance fee (high-priced tickets), or by shutting down the entrance to the beach if the number of swimmers exceeded the capacities (MZLRK, below Emona Hotel). The bathers should be directed to less visited bathing sites, where at least minimum equipment should be placed and the provisions for the improvement of conditions for bathers and the environment should be taken. Natural bathing sites need to be equipped with chemical toilets, rubbish bins and dumpsters, which need to be well maintained. The protected areas need to be made tidy and there should be no car access. There are also the following requirements: public transportation stations or stops, car parks near main entrances to the bathing sites, good signalisation of access paths; regulated car parks should collect parking fees, which should then be used to maintain the beaches (cleanliness). Another popular way of accessing such beaches is by sea; however, there is a danger of prohibited anchoring in the area of protected natural values on the sea ground (in Strunjan below the cross, "Madona" Cape in Piran).

An increase of the verge of capacity is also possible with the construction of swimming pools; however, this has not been taken into the consideration in the abovementioned calculations. If this should be the case, our recommendation is that at least one third of swimming area is sheltered, so that a whole-year service can be provided. The foreseen construction of the tunnel between Koper and Izola raises a question, where to store all the excavated material. One of possibilities is to gravel the islands and hence to enlarge the coast. Such idea should be accurately and integrally examined considering the influences on the environment.

3.2 The Quality of Bathing Waters

The carrying capacity regarding the quality of bathing waters has been assessed as **not sustainable**. The quality of seawater is still in the range of prescribed bathing waters

criterion, nevertheless, in some regions where the samples have been taken, it occasionally does not meet the criteria or it approaches the verges. That is why it needs to be pointed out, that the capacity of wastewater drainage and treatment in the region has exceeded, which indirectly influences the quality of bathing waters.

To ensure the quality of bathing waters it is inevitable to carry out the following measures:

- the rehabilitation of numerous local rain water discharges, which actually include the sewage of those settlements and facilities, which are not connected to the public sewage system and waste water treatment plant,
- the rehabilitation of the existing sewage system, where it has been damaged by the irruption of seawater and rain water, and
- the completion of waste water treatment plants in such a way, that they will provide all phases of water treatment, including the biological one.

3.3 Green Areas and Plots

In order for tourism to be a successful economic activity, the local community in the tourism region needs to take care for the areas of public use. Tourism indirectly contributes to more quality life conditions and broader conditions for the success of other economic activities.

Because of scorching heat in summer months, more attention should be paid to creating green areas, which provide enough shade (on the beaches, by the walking paths, in parks in urban centres) when conducting spatial planning.

The Municipality of Koper has made a felicitous decision to buy off the olive trees, which had to be removed from the place near Dekani due to motorway construction, and use them to embellish the parks and green plots, which will emphasise the Mediterranean look of the town even more.

In the tourist places of South Primorska, there is a lack of consideration of the use of recycled water for watering the green plots, which has already been dealt with in the section of the supply of drinking water.

The carrying capacity of green areas and plots has been assessed as **not sustainable**. There is not enough care for the creation of new green areas, especially for plantings, which provide pleasant shade during the summer. However, they need to be connected with walking and cycling paths.

Infrastructure Indicators

3.4 Drinking Water Consumption

The carrying capacity regarding the availability of drinking water has been assessed as **not sustainable**. Momentary capacity considering the normal hydrological circumstances is within the limits; however, there is a danger of shortage during the season's climax, in the case of the longer period of drought and in the case of possible water supply disruption from Croatia already during this year, that is why it is necessary to assure additional quantities from Padež water accumulation. Currently, the state is conducting a detailed plan for the construction of Padež water accumulation in Brkini; the construction process will last for several years. The projects envisage the replacement of the current water supply from Croatia and additional water quantity, which would satisfy the needs in

the case of a 30 % increase of tourism accommodation capacities, also considering the unregistered tourists and visitors. In the field of tourism, the water consumption can be lowered with the consistent consumption control and with the introduction of the devices and measures for economical consumption of water (in bathrooms, toilets, showers, swimming pools, watering and irrigation).

The use of recycled water from waste water treatment plants may result in lower consumption of drinking water. The modernisation of current waste water treatment plants in Koper and Piran and the upgrading of sewage system in the entire region provide an opportunity to simultaneously lay additional pipelines for recycled water. In Sežana--where the new waste water treatment plant provides 95 to 99 % water purity and where water complies with all the provisions laid down by the Decree on the Input of Dangerous Substances and Plant Nutrients into the Soil--they use it to water the green plots. There are other possibilities to use such water, namely for fire extinguishing, industrial use, etc. This could increase the price of already costly investment; however, it would have favourable long-term financial effects because of the fundamental cost reduction. Such is the case with the Tomos Company, which constructed its own waste water treatment plant (an investment of 207 million SIT, whereas 150 million SIT loan was provided by Ecologic Development Fund of the Republic of Slovenia). Tomos saves over 50 million Slovenian Tolars (i.e. approx. EUR 210,000) annually, because it has decreased the consumption of drinking water for 75 %. What is even more important is the image that the region would gain in the tourism market with an extensive use of recycled water, which could be well cashed in with an ecologic trademark for South Primorska (an increase in visits, more expensive tourist services).

3.5 Public Passenger Transport

Tourism generates extensive road traffic flows within and among the regions. The improvement of public passenger transport is one of the priorities in the sustainable development of the region. Insufficient public transport has resulted in a significant increase of taxi transport in urban settlements of the region, which is a very good supplementation; however, it is not an appropriate solution of the unregulated public passenger transport.

Sustainable regulation of public transport system in South Primorska demands a higher travelling frequency (in rush hours at least every 10 minutes) and smaller buses for the connection within certain urban centres (Ankaran, Koper, Izola, and Piran - Portorož - Lucija). What is desired in intercity connections, are not only the improvements in the quality and quantity of connections, but also a significant increase of regular sea liner routes, which have proven themselves to be able to compete with land traffic when it comes to the comfort and transportation time. The sea connections should be lengthened with faster and more comfortable liners to Italy (Milje, Trieste, Tržič, Gradež, Lignano, Jesolo, Venice) and Croatia (Savudrija, Umag, Novigrad, Poreč, Rovinj, Brioni, Pulj) and should hence connect the tourism centres of the Northern Adriatic with international airports.

The transfer spots to sea transport need to be organised multimodally, so that they provide an easy transfer from personal and public road transport (bicycle, car, bus), railways and airports, where possible, without too complicated and expensive interventions. It is of a great importance where the junctions are placed within the tourist towns. Several solid locations have been proposed within the scope of different international projects and urbanism workshops: in Portorož a new passenger pier near the new planned local centre next to Avditorij (the auditorium) and bus stop; in Izola in the eastern part of the town next to the shopping centre Ruda (Ažman Momirski and

Gojanovič Purger, 1997); in Koper on the northern coast of historical town centre, where the passenger terminal of international dimensions and a possibility of anchoring big ships from Mediterranean cruises is being created; in Ankaran on the northern coast of the foreseen third Luka Koper pier (Jurinčič et al., 2001).

The traffic regime change in Portorož is the most appropriate way of disburdening direct coastal region between the hotels and the sea, but at the same time it is the most expensive. An alternative needs to be found for the current main road between Lucija, Portorož and Piran, which runs between the hotels and the sea and thus interrupts a valuable and undisturbed communication for tourists. The project is of a great pretension from the financial point of view as well; however, it would have high financial effects by placing the destination into the higher price bracket. This is undeniably one of the projects, which has to be supported by the country due to its importance for the destination development. It would be possible to acquire the EU Development Fund's financial means. The situation is similar with the road section between Koper and Izola. By moving the coastal road into the planned tunnel--with its entrance in Žusterna and its exit next to the shopping centre Ruda in Izola--South Primorska gains a valuable part of the coast for recreational needs and tourism.

The assurance of larger additional parking areas outside would by all means negatively influence the valuable building lands next to the coast, or even more valuable green areas (green plots, parks, gardens), which are already at stake during the season's climax. The constructions of multi-storey car parks is a very expensive solution, but at the same time a very suitable one due to the lack of space. The construction locations in all three towns have already been prepared; however, there have been some complications in granting the spatial documentation. The transfer of the main road in Portorož to hinterland should also be mentioned, as well as the sustainable regulation of public passenger traffic. The combination of all the approaches would be the most appropriate.

Larger emphasis should be given to maritime transport, which should be accompanied by regulation of appropriate passenger terminals on traffic junctions in the proximity of all three urban centres. In Koper, such passenger terminal is being constructed in the northern part of the old town centre.

Shipping link between the towns of Slovenian coast which used to operate in the past should be reinstated. The link with the Italian towns and tourism centres has also been foreseen. Seasonal links to Venice and Brioni are already operational. In 2004, a ferry link with Dalmatia (Koper - Zadar) was introduced and it has been very interesting for Slovenian and central European market due to the traffic jam during the season. An introduction of a larger passenger terminal in Koper would result in good conditions for other ferry links between Mediterranean tourism centres.

The carrying capacity of public passenger transport has been assessed as **exceeded**. What is critical, are the conditions in the road transport during the summer season, holidays and the weekends in the period before the main season and after it. It is necessary to find a complete solution for other narrow road areas, seeing that the traffic hold-ups and jams dissuade the tourists from visiting and negatively influence the environment.

3.6 Accommodation Capacities

To ascertain the available accommodation capacities in the region, an overview of attainable data will be presented.

Apartments

Local tourism organisations, Business interest association Portorož, tourist information centres and tourist agencies should more effectively organise a complete tourism offer of a relatively large number of existent apartments in Slovenian Istria. Most of the apartments are private properties and they are poorly occupied. Tourist information centres only market those which are the property of Portorož hotels (283 bed places according to the data of Tourist Association Portorož in 2000) and only a small share of those which are an individual property. This requires additional efforts to change the mentality of the apartment owners, who do not realise the unexploited economic potentials they have at disposal. This could result in several positive effects:

- satisfaction of demand, which shows the trend of fast growth,
- saving the valuable land,
- decreasing the sale of hotel capacities for apartments,
- better use of capacity and infrastructure throughout the whole year,
- enabling additional regular income for local population,
- out of season revival of mainly "dead" and even dangerous settlements,
- increasing the demand for tourism (catering industry, swimming, massage, sport, etc.) and other services (transport, hair dressers, etc.) and products (domestic agricultural and other produce or products, other merchandise),
- encouraging the farm tourism,
- preventing the non observed economy and increasing the income of local community and the country (tourism taxes, taxes).

Secondary Accommodations

In the past (in the 80s and 90s) many secondary accommodations were constructed in the attractive areas, which presented a great potential for the development of tourism economy. There are many areas where buildings had been constructed directly at the beaches, in natural parks or had been constructed illegally just before the protected natural areas were proclaimed or more restrictive regulations were adapted. In the municipality of Piran 380 illegal buildings were recorded in 1995, from which 250 were applicable to legalisation, whereas 130 were set to be demolished; however, only a few have been (demolished) so far.

The instruments of spatial planning policy have not yet been able to repress the problem. An important step would be a definition of smaller areas intended for the construction of weekend cottage settlements, since the lack of land offer generates illegal constructions.

The local community is negatively affected by such construction, because of: its burdening of the local infrastructure, irrational land use, usurpation of the coast as national assets, the loss of cultural identity. In some tourist towns the capacities of secondary accommodations are larger than those of the hotels, which results in structural and functional disturbances.

Holiday Homes Owned by Companies and Summer Resorts

This particular tourism offer has caused some economic and spatial disproportions in the tourism development. It is often the case, that such facilities occupy the most attractive locations, which would accumulate larger economic effects in the form of commercial tourism offers. It would also have a more favourable influence on the employment of the local workforce and income.

Besides holiday homes owned by particular companies, organisations and dormitories (during the summer they are intended to be used by tourists), Slovenian Istria provides the following summer resorts:

- Youth Health and Summer Holiday Resort of Slovenian Red Cross in Debeli Rtič,
- the summer resort in Ankaran owned by the Multiple Sclerosis Society of Slovenia,
- the two summer resorts, one in Jelarji and one in Kaštelir, owned by the Cerebral Palsy Association of Slovenia - "Coastal Centre Sonček",
- the summer resort in Izola, owned by the Union of the Blind and Partially Sighted of the Republic of Slovenia.

Socio-economic Indicators

3.7 Occupancy Rate of Bed Places

Full occupancy rate of accommodation capacities is common for two weeks in the beginning of August. According to statistical data, the average occupancy rate in 2003 was only 35 % (table 7). The lowest occupancy rate is distinctive of the room renters; however, it should be noted, that in this particular category, the actual occupancy rate is fundamentally higher due to the unregistered guests.

The carrying capacity of the region regarding the occupancy rate of bed places has been assessed as **not exceeded**. According to the low occupancy rate throughout the year, appropriate arrangements should be carried out for the better use of existent accommodation capacities. This is possible with additional offers to extend the tourism season, or with partial restructuring of different holiday homes; only after that, it is reasonable to construct new accommodation capacities.

3.8 The Satisfaction of the Population with Tourism Effects

In order to establish the attitude of the local population towards tourism, a questionnaire has been carried out among the inhabitants of Portorož (on 25th June 1999) since this area has had the longest tradition of tourism and the highest level of tourism development. The same questionnaire has been carried out also in Koper, Izola and Piran (on 21st March 2003) and in Strunjan (Svetin, 1998). For our study we interviewed random population to present different parts of one location equally. The results have been compared hereinafter.

If we take into account the tourist capacities and the number of overnight stays it is evident that the intensity of tourism in the region increases in the direction from Koper to Ankaran and also in another direction from Koper, via Izola and Strunjan to Piran and Portorož where it reaches its maximum. This has also been confirmed by the answers of the interviewed population when asked whether they believe their settlement is a tourist settlement. We have been slightly surprised by nearly unanimous opinion of the interviewed Izola population (95.8) that Izola is a tourist settlement. This is most likely a result of the efforts of the local administration and the tourism economy in the past years to make a once fishing and industrial town obtain the image of a tourist settlement. This has been confirmed by the results of a questionnaire carried out among the population and tourists regarding their opinion about the quality of the environment, and also the result of the municipality's efforts in this area, which have been in progress in the Izola municipality for some years.

When the inhabitants of Portorož were interviewed on their direct benefits from tourism and also their 'economic' dependency on it, only a half (49%) of the interviewed gave a surprising answer that they have no benefits from tourism. This is indeed not in

agreement with the established image of Portorož as a distinctively tourist settlement, where the majority of the population is supposed to be at least indirectly economically linked to tourism (employed in service activities, room rental etc.) Planina (1997), for instance, claims that in 1981, the Portorož gross domestic product in tourism and other activities linked to tourism consumption amounted to 90% of all gross domestic product. And Sirše (2000) ascertains that more than 50% of employees are employed in and the entire income in the municipality of Piran originates from tourism. There are many possible explanations for such replies; one reason could be a low number of random sample (only 1%) which is not representative enough and another reason is also the fact that Portorož is a place of living for those who are not employed in this area or in the municipality of Piran, but work in other coastal settlements and towns or in the central part of Slovenia and only live in Portorož for its prestigious status.

The percentage of the Portorož population who claimed to rent out rooms to the tourists (27,4%) agrees with the official data that nearly 500 households (14 affirmative answers x 100, since the sample represents 1% of the population and divided with 2.8 since the average size of a household is 2.8 persons = 500 households) rent out their rooms via TIC Portorož.

However, this data is less reliable considering predictions of the experts that the same number of people rent out their rooms undeclared, which is confirmed by water consumption data. Most likely, the owners claimed they do not rent out rooms due to their fear of the taxation of their activity. The percentage of private accommodation in other resorts is actually considerably smaller compared to Portorož, which is also confirmed by our questionnaire.

Only 19.6% of the interviewed in Portorož is employed in tourism full-time or works in tourism occasionally. We have mentioned earlier that the percentage of actually employed in tourism in Portorož is in fact higher. The answers of the Koper, Izola and Piran population, which have been obtained three years later, are much closer to the actual situation (26.2% to 42.9). We can conclude that the official data for a wider area (Coast-Karst region in 2000 - 7.5%, the municipality of Koper in 1999 - 4%), which presents only Hotels and Restaurants (tabulation category 'H', according to the standard classification of activities), do not represent tourism activity as a whole.

The significance of tourism is thus even more concealed and underestimated in the official statistical data. Namely, tourist agencies are registered in the tabulation category 'I' (transport, storage and communications), and in the tabulation category 'O', which separately includes the activities of the marinas, casinos, different sports and other recreational activities, including only the most important ones. In order to obtain the actual situation and contribution of tourism to the total economy, we could make use of the method of satellite accounts recommended by WTO. International Tourism Institute has recently received an order for the execution of a study of the situation in Slovenia. In the future, Statistical Office of the Republic of Slovenia will be able to monitor the role of tourism regularly, according to the satellite calculations.

A vital conclusion, regarding the planning of sustainable development, is that 50% of the interviewed population of the region, with the exception of Strunjan (67.4%), claims they have no benefits from tourism. Therefore we need to be even more careful in the process of planning and should take into account the opinion of the local population as well. This part of the population has a considerably different attitude towards development of tourism in their hometown compared to the other half, who has direct or indirect economic benefits from tourism activities. Yet the fact that about two thirds of the interviewed (58.8

to 78.3) claim that they have not been deprived of anything due to tourism activities, is indeed encouraging.

When comparing positive and negative effects of tourism in Piran and Izola, we have noticed a higher number of answers claiming tourism has positive effects (186 and 311) compared to the answers claiming it affects their lives in a negative way (156 and 296). This means that there are more people supporting tourism than those who do not. In Koper and Strunjan the answers were nearly equal: 172 or 184 people claimed that tourism has positive effects and 170 or 185 claimed it has negative effects. Piran is an exception, as they have showed a slightly more negative attitude towards the effects of tourism (230 negative and 204 positive answers), which is understandable due to their traffic and other environmental problems arising from a higher number of tourists and a specific location of the old city centre on a narrow peninsula.

The most important are favourable economic effects in Portorož and also in other resorts. The opportunities for employment of the local population have been rated as the most important. This proves the importance of employment for ensuring a general quality of life. Tourism offers also various possibilities for employing women and mainly young people looking for their first employment, having different levels of education. For those job-seekers in tourism, previous work experience in service activities, which are predominant in the region (such as traffic or trade), are welcome.

The local population of Koper and Izola claim that additional tourist demand and presence of foreign tourists significantly influences the quality and variety of the catering as well as commercial offer which would not exist in their hometown otherwise. In Strunjan the local population have stressed other aspects. The greatest contribution that tourism brought about in their town was, in their opinion, better traffic conditions and recreation facilities. The reason for the significance of the improvement is most likely in the rural characteristics of the location compared to the urban centres. Another reason is that tourism has been present in Strunjan for a shorter period and, most importantly, less intensively.

Effects on social spheres of life have followed positive economic effects. Tourism brings about a greater number of possibilities for social and cultural life. This brings the offer of such events in Portorož and the entire South Primorska to a higher level, which would not be achieved in this region according to the number of its population otherwise. Similarly, tourism is also the reason for the resorts having better recreation facilities which create better recreation conditions for the local population, who also benefit from them. In Strunjan the contribution to social and cultural life of the place was the least evident as its offer cannot be compared to that of the urban settlements. The same situation holds true for the commercial offer of the resorts.

Less positive effects have been noticed concerning the environment regulation and the reputation of the place which should not be overlooked. However, we can conclude that better road conditions and communications, public utility infrastructure as well as environmental regulation are the values which are appreciated by the local population.

A considerably high number of answers regarding the negative effects of tourism reflect the incredible sensitivity of the local population to the quality of the residential environment. Noise, overburdening of the roads and environmental pollution are negative effects of tourism to the environment, and which have been exposed as the most disturbing. Frequently, people complain about high prices of services and goods which greatly influence the living standard of the local population, due to the developed tourism. The given answers regarding harm to property, cultural landscape and losing the authentic

local identity have proved as insignificant. In Strunjan we can expose the observation regarding the inappropriate building of summerhouses which is much more noticeable in this sparse settlement and in the middle of a cultural landscape than it is in urbanized city centres. The local population of Piran and Koper are also sensitive to the building of summerhouses in their towns.

A demonstration of a negative influence to the local population of an inappropriate form and the fact that it is a mass event is Kopraska noč (the Koper night). Kopraska noč continues the tradition of Portoroška noč (the Portorož night), which became uncontrollable and dangerous event due to the mass of its visitors and was therefore abolished. Due to a great number of its visitors, Kopraska noč is also not popular among the local population. The event has raised an interesting discussion on the websites and in the media. Besides the noise, especially during the night, which lasted for a week, the complaints were mainly about the dirtiness of the town after the event and about its low-priced entertainment which does not originate from the local characteristics and does not reflect home-made creativity. This event is a missed opportunity as regards a wide ascertainment of the Istrian craftsmanship, wines, dishes, music and their local artists and traders. It would be more beneficial and less damaging to the environment if this 'Koper week' was transformed into 'Koper summer' which would enliven the life in the old part of the town and its population for a longer period of time, of course with a controllable amount of noise, waste and other negative influences. The inhabitants of Koper would easily accept and tolerate such event also because of long-term economic effects on many of the inhabitants, since they would benefit directly in a greater extent.

On the basis of the analysis of the collected data based on interviewing the local population regarding their satisfaction with the effects of tourism we have ascertained, on the basis of this indicator, that the carrying capacity is **not sustainable**. The negative attitude of the local population is the result of the inconvenient infrastructure in the main season as it greatly influences the quality of life. The effects of mass tourism have been considered negative in general, especially if the latter does not allow enough opportunities for expressing the local identity and culture of the region. Indeed, the possibilities for a greater inclusion of the local population in creating the tourist offer exist, including encouraging entrepreneurship in tourism and its related activities, which consequently bring about better possibilities for earning money. By building a better general infrastructure, which will influence the increase of the quality of living of the local population, we can also, indirectly, achieve more cooperation of the local people regarding tourism development.

We can claim that the local population support the projects in the area of tourism, which are in accordance with the capacities of general infrastructure and do not influence the environment in a negative manner. A confirmation of the predicted enhancement of accommodation capacities for 30% to 2020 and other tourist infrastructure in accordance with the planned tourism products, and consequently welcome an increased number of tourists, will be known after the confirmation of a long-term strategy of sustainable tourism development in the region and also regional ideas for environmental development. The local population have been actively participating in the procedures of the preparations of the documents regarding these matters, namely with their comments and suggestion and have, indirectly accepted them with their representatives in the municipal boards.

Summary

The method of the carrying capacity analysis has proved to be a suitable aid for preventing excessive occupation of a tourist destination and for realization of sustainable tourism development strategy, mostly in certain Mediterranean tourist regions and

elsewhere. Tourism which does not consider the capacities of a region, in the long-term, threatens its own development and even its existence. Besides this, it also has a negative influence on the entire region development.

A special attention has been drawn to the selection of carrying capacity indicators. The definition and classification of the indicators was based on the assumption that we are dealing with a developed tourist destination, therefore we put a greater emphasis to the spatial-ecological and infrastructural indicators, as are otherwise emphasized in written sources, and we arranged them in two separate groups. In making the carrying capacity analyses in undeveloped countries and in developing countries, there are usually two separate groups of socio-economical and psychologically political indicators. We, however, have joined them in a group of socio-economical indicators. Our presumptions have been proved correct, which was confirmed by the results of interviewing the population as well as the tourists. They have expressed a great dissatisfaction with the unsettled general infrastructure, which does not keep pace with tourism development. This is particularly problematic in the time of the bathing season.

After analysing 9 key individual carrying capacity indicators of the Slovenian Istria regarding the scenario of the sustainable tourism development, we have established the following:

- 2 (22%) exceeded the capacity limit
- 6 (67%) carrying capacity is not sustainable
- 1 (11%) carrying capacity was not been exceeded

The main restrictive factors which need to be considered when studying sustainable tourism development are discharge and cleaning of effluents, lack of parking lots, public passenger traffic, quality of seawater, quality of drinking water, collecting and dealing with waste, and dissatisfaction of the local population and the tourists. Without investing in infrastructure which greatly limits sustainable tourism development in the region, it is not reasonable to increase the number of accommodation capacities and is unreasonable to expect the satisfaction of the local population and the tourists. Therefore, we need to start adopting and executing the necessary measures as soon as possible.

We have defined some of the priority activities for the introduction of sustainable tourism development in accordance with the carrying capacity analysis in the Slovenian Istria in general:

1. Tourists are satisfied with the hotel offers, yet the hotel capacities, on the other hand, are by annual average occupied only to 50% and if we take into consideration the dissatisfaction of the tourists with the rest of the tourist offer, we can recognize the need for the improvement of an extra tourist offer in the entire region and thus prolong the tourist season to last throughout the year.

2. A project of thematic and other walking, cycling and riding trails should be drawn up with the purpose of encouraging tourism development in the hinterland. This project should at the same time be interdepartmentally thematically and financially harmonised with the ongoing projects, as for instance projects such as wine trails, the protection of typical agricultural products, integral development of the countryside, the renovation of villages as well as encouraging the development of supplementary activities in agriculture. Besides this, a newly formed network of paths should be joined to those in the neighbouring countries. For example, within PHARE project, the already formed cycling paths in Kras could be joined with the planned paths in Italy and Croatia.

3. The Republic of Slovenia should financially support the construction of systems of discharge and cleaning of effluents and purification plants and ensuring home and foreign

non-refundable means and intended assets from the state and from the European funds as well as from favourable sources of financing. Without these measures we will not be able to ensure the quality of bathing water and the conditions for increasing the tourism capacities.

4. When planning traffic infrastructure (motorways, an extra railway track, public traffic between the cities). On the one hand, these solutions help solving the existing traffic problems, but on the other hand, they bring about new problems, such as the increased amount of traffic and increased number of tourists, which require previous preparations.

5. A more exact tourism development programmes should be prepared:

- for the areas which are already predicted for tourism development activities in the planned documents (Ankaran peninsula),
- for the areas which have not been defined as tourist areas (the hinterland of the region)
- for the areas which will be relieved from the pressure due to the construction of traffic infrastructure or due to cessation of other activities (the coast between Izola and Koper, the site of the former Droga factory in Seča, the abandoned mine of Sečovelje) and
- for restructuring of the existing tourist areas in time, according to the tourist demand

6. To establish the management of a tourist destination in one place, where a common trading, promotion, planning and tourism development monitoring for one region would be provided. The care for a harmonized and qualitative sustainable tourism development should be present at all time.

7. Education of those employed in tourism and local self-administration in all educational levels regarding the significance of the environment for a successful sustainable tourism development in the region.

The ascertained carrying capacity is not something definite which will not undergo any changes. With a change of circumstances, on the basis of which it was determined, and with a suitable strategic management, its value can be increased; yet, on the other hand, with inconsiderate management and unsuitable tourism development, the value of carrying capacity can be decreased. Therefore we need to predict the measures for monitoring and increasing the established level of carrying capacity. The established carrying capacity of the region can present a useful tool for directing the development of the region towards sustainable tourism, which can present the amount of the tourist visits, which is still acceptable and also the measures needed to obtain or increase the carrying capacity. It presents a professional foundation for accepting short-term and long-term decisions in the area of sustainable tourism development.

IV. THE VISION AND STRATEGIC DEVELOPMENT OBJECTIVES

4.1. The Vision

THE TOURISM OF SOUTH PRIMORSKA TOURIST REGION IN 2012?

Tourism of Istria, Karst and Ilirska Bistrica-Brkini joint in the destination of South Primorska will become constantly tended and appreciated worldwide as a pearl treasure of the north Mediterranean. It is known by a variety of tourist programmes and services, by the contribution of tourism to the quality of living in this region as well as by its respect towards biotic diversity on the land and at the sea and also by the exceptional care for natural and cultural values which form the Mediterranean identity of the region.

On the border of Slovenia, Croatia and Italy, nautical sports, »wellness« and worldly business tourism in combination with a variety of cultural, natural and artistic sights, among which there are Lipica and Škocjanske jame (Skocjan Caves), nautical sport events and infrastructure as well as worldly business tourism present the crown jewel of tourism in this region.

IN SHORT: By 2012 the tourism of South Primorska will be known as the "pearl treasure of the north Mediterranean" which comprises of the pearls of cultural, ecological and coastal tourism and is distinguished by exceptional care for them."

4.2. The Objectives and Strategies

The Basic Objectives and Strategies for the Realisation of the Vision

1. Substantial Development
2. Organisation Improvements
3. Quality Increase

4.2.1 Substantial Tourism Development of South Primorska

Development model

Substantial tourism development vision concentrates on the tending of tourist pearls of the studied region. This will be possible by realizing the development model, which is based on four pillars:

Pillar 1: development priorities and objectives which in a sustainable and trendy way **remove recognized problems** in the existing offer and demand

Pillar 2: development priorities and objectives which in a sustainable and trendy way **strengthen the recognized advantages of the existing offer and exploit the advantages of the existing resources**

Pillar 3: development priorities and objectives which in a sustainable and trendy way **follow the future trends in offer and demand** in the field of tourism and marketing

Pillar 4: development priorities and objectives for **creating future trends** by innovations for **taking over (leadership)** in the Mediterranean world

The vision will thus be realizable through realizing many implementation projects and activities for achieving development priorities and strategic development objectives based on four development pillars and which realize the orientation of the Mediterranean environmental programme, World Tourist Board and National Tourism Programme for the period from 2007-2013, which aims to direct tourism into a more sustainable form.

Four pillars of development tourism of South Primorska

PILLAR 1:
development priorities and objectives which in a sustainable and trendy way **remove the recognized problems** in the existing offer and demand and realize the challenges in **exploiting the resources in accordance with carrying capacities of a place**, also considering **development resources capacities/capability** (of people, organisational-management systems and development means)

PILLAR 2:
development priorities and objectives which in a sustainable and trendy way **strengthen the recognized advantages** of the existing offer and exploit the advantages of the existing resources

PILLAR 3:
development priorities and objectives which in a sustainable and trendy way **follow future trends of offer and demand** in the field of tourism and marketing

PILLAR 4:
development priorities and objectives for **creating new future trends** (objectives for innovations in tourist offer, demand, marketing, organization) and for the **taking over (leadership)** in the sustainable tourism of the Mediterranean world

Table 3: Sustainable Growth Strategies and Tourism Development

Development frameworks	Strategies
Framework 1: Development of new and improvement of the quality of the existing tourism products, services and infrastructure in a sustainable and trendy way	Diversity strategy (diversification) of offer and services
Framework 2: Sustainable management and marketing	Offer differentiation strategy and quality improvement (differentiation of offer and services)
Framework 3: Investing in people, knowledge and employment in tourism	Enforcement of competitive advantages and taking over - leadership (competition strategy)
Framework 4: Accessibility improvement	Sustainable mobility strategy as a competition support

Increasing diversity strategy (diversification) in the tourism of South Primorska is necessary due to:

- reducing dependence on the season and other risks on global and EU markets (e.g. due to fuel price growth, safety endangering, natural and other disasters)
- growth of market size (as a result of the expanded EU and thus greater mobility and due to opening of global markets),
- accelerated growth of tourism activities,
- predicted greater exploitation of the existing possibilities and resources in tourism,
- growth of products and services complementary to tourism,
- adjusting to competition on world markets and encouraging bigger innovation due to
- reinforcement of inter-organisational cooperation in tourism
- establishing new companies and entering in new and complementary activities in tourism (information technology) and acquiring new markets in accordance with development trends

Diversification can be:

- a) upgrading of the existing products/services, infrastructure for the **existing markets** and marketing segments (their design, quality, processes in product range, development of supporting services, investments in infrastructure and technological superiority)
- b) upgrading of the existing products/services for **new markets and marketing segments** (products are adjusted to the new markets and new demand - trends)
- c) development of new, innovative, creative, sustainable and trendy products, services, infrastructure for the **existing markets**
- d) development of new trendy and sustainable products for new markets - attraction of **new marketing segments** with a higher added value

Differentiation strategy

Differentiation ensures a decision regarding the choice of destination or its products for tourists. The tourist offer of South Primorska can differ from other tourist offers among which potential tourists have the opportunity to choose from,

especially among the Mediterranean coast destinations and/or other programmes. The way South Primorska can differ from other offers can be due to a created different image of the destination or through trade marks and/or promotion and activities which present this destination as different from others, for example due to a different way of executing their tourist activities.

Strategy of building the competitive advantages and taking over the leadership

The latest researches, which measure competition in tourism, differ between at least eight indicators of competition of tourist destinations where tourism of South Primorska can take over the leading role, namely:

Price: relationship between purchasing capacity and the price of overnight stays

Infrastructure development: communal infrastructure development

Environmental quality: population density, greenhouse gas emissions, water resources

Technological development: range of Internet access, telecommunicational connections and the use of high technology

People as resources: level of education

Accessibility: extrovert towards tourists, tax limitations, trade limitations

Social development: life expectancy, education, income per capita

Human factors in tourism: participation of people in tourism which is measured in the relation between arrivals and departures of tourists per population rate.

In case of South Primorska, the competitive factor for taking over the leadership in tourism is mainly built on **human factors, social development and people** which will consequently influence the gradual taking over of the leadership in other activities (e.g. technological development or environmental quality).

Mobility strategy

This strategy is based on the Basis of the Draft Resolution for Transport Policy of the Republic of Slovenia and sustainable traffic policy. At the same time the guidelines and trends of information technology development have been considered. Mobility strategy foresees a greater possibility of the choice of transport means and development of informational systems which help soothe the pressure on a place and contribute greatly to the quality of the tourist offer and the tourist, visitors and local populations' behaviour patterns.

4.2.2 Organisation improvement

For achieving strategic orientation and development objectives, a harmonized, connected and efficient system of tourism development execution will be needed. This will be achieved by effective organisation of tourism development on the regional level within the regional tourist (destinational/tourist landscape) management organisation (RDO=DMO), which connects different operators, not only the holders of tourist activities but also and above all the holders of tourism development.

The products of the subregions contribute to a more competitive offer of individual subregions within the tourist region of South Primorska as a whole. Thus, cross-networking and marketing (e.g. nautical sports can be joined with hunting and cultural tourism) as well as chain integration (e.g. all cycling trails in a destination form one

product of the destination) can take place. Therefore, a suggested organisation is in accordance with national orientation on organisation on the local and regional level of tourist regions (we elaborate on this in Framework IV).

4.2.3 Quality increase

Sustainable performance of tourist services first and foremost requires tourist companies and organisations which, in order to ensure sustainable services, need to particularly ensure:

- Quality on all levels of business activity and particularly increase the care and tending of the users of the tourist services. This is of vital importance for ensuring economic sustainability and satisfying the needs of the visitors and particularly for keeping the visitors in a place and influencing their decision to return to the same destination, which presents a special challenge of the modern tourism.
- Influencing the sustainable tourist behaviour with the help of providing information, encouraging sustainable practices (e.g. reducing the consumption of detergents, respecting the local traditions). Tourist behaviour, which is in accordance with sustainable principles, greatly influences the tourists' decision for travelling and to tourist flows in the area. In this context, a special attention needs to be given to the measures taken for ensuring specific desired behaviour of the visitors, as for example, activities supporting the decision, regarding the time when the tourists should travel (e.g. not in the time of the main season), which tourist destination in which regions they should visit and when they should visit them, due to the management of tourist flows, e.g. to avoid traffic jams or overburdening of protected areas.
- With a range of activities and development of services it is also possible to influence some kinds of transport which are used by tourists to reach a tourist destination and for transfer within it. Besides this, it is also possible to influence their choice of tour operators and travelling agencies they travel with, the size of the groups in certain areas and after all, also the length of holidays or a visit.
- Enforce services and activities for protecting natural sources, such as the use of drinking water, reducing greenhouse gas emissions by using renewable energy resources, services which encourage the use of sustainable transports and similar.
- Business cooperation of tourist companies with the local suppliers (e.g. for ensuring transports, provisions).

4.3 The Marketing Objectives and Sustainable Tourism Marketing

Sustainable tourism marketing is not regular tourism marketing but requires the joining of marketing activities through all economical, social and environmental sectors. Since we are dealing with complex marketing activities and planning them surpasses the extent of this strategy, we need to / will need to approach to the forming of this strategy and the performance of the sustainable tourism development marketing plan as to one of the priority development projects. This strategy should, besides sustainable aspects, also take into account the new trends in the field of marketing (which are stated in the appendix - trends in the field of tourism).

The strategy of the development of sustainable tourism development will also include some strategic marketing orientation for the preparation of this key document, as regards the tourist economy and sustainable development partners.

The forming of a sustainable tourist offer and a sustainable tourist consumption/demand are performed at the same time. Both sustainable offer and sustainable demand meet on the level of sustainable products and services. If a detailed study of both is not performed,

the developing of sustainable products and services as well as acquiring their consumers will present a serious problem.

When developing marketing objectives and orientation, the exact relationship between the number of tourists in the area and the carrying capacities is of vital importance. Carrying capacity analysis (carried out only for the most developed tourist area in Slovenian Istria) has showed that the current carrying capacity, which does not threaten the sustainable balance of Slovenian Istria, is **18,000 tourists per day and can increase up to 29,200 tourists** and not threaten the sustainable balance (see chapter on carrying capacities). On the basis of this indicative data on the potential number of tourists on the level of subregion it is possible to:

- a) form marketing orientation and measurable marketing objectives for marketing differentiation on the basis of sustainable principles
- b) execute a selection of the kinds of sustainable services and the necessary investments in sustainable infrastructure, in attractive sustainable facilities, sites of special interest, events (attractions) and mostly
- c) to invest in the development of sustainable tourism products, services as well to build their marketing potential within different marketing segments for
- d) achieving a strategic development objective - competitiveness of the South Primorska tourism with its sustainable tourist offer.

When defining **marketing objectives, marketing positioning of sustainable tourism development and marketing segmentation of sustainable tourism development** is/will be necessary to consider some **specific features of sustainable tourism development marketing.**

Orientation for objective marketing, segmentation and positioning of sustainable tourist offer.

Sustainable tourism development is based on the resources and not solely on the market needs.

Sustainability also includes authenticity (which is also the trend in tourist demand), which also means the tourism product does not change only to meet the tourist needs at any price. Yet, at the same time this does not mean tourism products do not consider tourists' expectations and requests, and most of all the requests of the tour operators.

International markets as an objective

International markets need to be balanced and before considering the tourists from international markets, the tourist offers need to be adapted to the domestic visitors and visitors from the neighbouring markets, which fill in the major share of the capacities. In this manner we can avoid the risks of the unforeseeable international trends. And besides this, advertising in domestic and regional markets is nearly always more effective.

Sustainability as a unique selling opportunity

For the majority of consumers, the sustainable development will be interesting within other crucial criteria for the choice of a destination, such as the price, accommodation, accessibility of recreational activities and similar.

Sustainability as a part of the quality

Tourists are prepared to pay for sustainability only after the basic characteristics of quality have been achieved. The winning sustainable products are those which ensure additional value to the existing ("non-sustainable") quality.

From the mentioned above, we can conclude that for positioning and the choice of target marketing for sustainable tourism development we need to, above all, consider the following factors:

- seasonality of the offer
- market growth potential
- consumption in a destination per capita (tourist consumption of chosen markets or segments which needs to be as high as possible, since this way the tourists can contribute more to the social growth and re-investing into development) without additionally burdening the environment,
- travel duration or the period of staying in a destination
- travel distance - distance of markets from a final destination (globally-lower pollution due to shorter distance of travelling)
- suitable offer for a different target segment
- responsibility towards the environment
- reliability of the markets and segments
- non-discriminatory offer for all - especially for people with limited possibilities for travelling
- capability of efficient marketing and communication markets or segments accessibility

Strategic development orientation regarding the offers and markets are indeed based on the previously mentioned factors, yet when making decisions we need to consider also the fact that certain emitive international markets can have a great potential for growth, for high tourist consumption and a good relation towards a product, but they are more seasonally oriented, their arrival is more uncertain, they are less flexible and geographically more remote, which requires longer travelling. On the contrary, domestic and closer markets can be economically less beneficial (e.g. income from a tourist per capita), yet they are more reliable, less seasonally oriented and they contribute more positive sociological impulses for all involved. And above all, marketing is more efficient, as regards the prices. Where there are possibilities, business or MICE tourism can contribute to controlling seasonal variations.

4.4 Strategic orientations according to spatial units

Karst area: Pilot Karst Project (for period 2003-2006) states that visitors come mainly from closer city centres such as Trieste, Koper, Nova Gorica and Ljubljana. It lists the **emitive markets of the Karst tourist offer, namely the entire Slovenia, Austria, Istria, Dalmatia (Croatia) and Venice (Italy)**. The present trend is a demand for overnight stays in the countryside, but the information is not easily accessible. In this tourist offer the level of hospitality and the awareness of the Karst values as well the importance of tourism among the local population is quite low. We can also notice a certain level of passivity and the lack of innovation. The final report of the project states a need for the establishment of a marketing plan which would present the guidance criteria for an effective plan of the formation of a delineated tourist offer and promotion of the area. As further marketing activities it also states:

- Formation of integrated image of a joint trademark

- Production and distribution of a joint promotional material of a tourist destination
- Upgrading and maintenance of an integrated web presentation of tourist offer of the area

The area of Ilirska Bistrica has a low number of overnight stays but a higher number of visitors. The area is at present not actively or systematically traded, therefore we could not obtain the data on the present marketing activities. In this municipality, a tourist information center is responsible for transmission of information. The structure of foreign visitors who visit the area of Ilirska Bistrica, has been summarised by the municipal strategic development documents and reads as follows: **the majority of visitors come from Croatia, Italy and the ex-Yugoslavian countries.** Foreign transit tourists mostly stop in catering facilities, boarding houses and rest areas along both radial roads leading into the region.

The following emitive markets have been determined:

- Primorska and Notranjska region (the vicinity of Ilirska Bistrica);
- The rest of Slovenia with particular emphasis on Ljubljana and the central part of Slovenia
- Italy;
- Croatia;
- EU countries

According to the possibility of the immediate offer formation, the following motivational visitor segments are particularly interesting:

- Organized excursion groups;
- Sport and recreation
- Visitors come with their families to relax, have fun and rest
- School groups on excursions and day-trips;
- Transit;
- Gourmets and culinary art

For future marketing offers we suggest the following distributional channels:

- Direct reservations (individual reservation)
- Tour operators and tourist agencies (organized groups);
- Schools and other educational institutions
- Companies and other organisations (clubs, societies and similar)
- »Walk in« guests.

We have defined the following marketing and organisational objectives for the period to year 2008

- Development of new complementary tourism products adapted to target groups
- Preparation of the integrated visual image of the destination of Ilirska Bistrica
- Tour operators integration in Slovenia, Croatia and Italy as primary markets and the establishment of joint marketing activities
- Implementation of a modern tourist website offering a price or destination display and offering a possibility of tourism management via the Internet
- Increase the level of professional education in the field of development and marketing of tourist activities on the local level
- Implementation of partnership organisation in the area of the municipality of Ilirska Bistrica among individual tourist services, development of information link among partners

Slovenian Istria is in the entire region and also nationally, the most recognizable and active in the market, but its segments are still not connected enough - at the coast as well as in the hinterland. definite marketing data and analyses were in the time of drawing up

this document, not sent to us, thus we are going to summarize some meagre marketing contents taken from the Strategic development documents of the municipalities of Koper and Piran. According to documents of this type, the coastal offer finds motivationally interesting segments like **individual guests, youths, special groups, same-day visitors and the seniors**. At present emitive markets of the greatest interest are, besides **home market, also Italy, Austria, Germany and Croatia** and also **Ukraine, the Russian Federation and the ex-Yugoslavian countries**. Emitive markets differ according to individual coastal municipality. According to the needs and expectation of the visitors (tourists and same-day visitors) of the municipality of Koper our suggestion for products development is that tourism products should be structured in the way to function on the market as tourist programmes and tourist offers in the way to satisfy the existing and potential markets or market niche. The purpose is to satisfy the needs of the following groups:

- specialized groups of visitors, mainly from the field of culture, sport and health
- business guests,
- transit (road and nautical),
- youths
- third age.

We have noticed a lack of economic sector cooperation in planning integrated development and forming the contents of the strategic documents, although economic entities are the most important holders of tourism development and marketing of the coastal tourist offer. Consequently, tourism is on the market in the coastal area (mainly in the municipality of Piran), besides 'classical' summer holidays, positioned and traded by the help of different trademarks from wellness field as well as the conference or business offers and gaming. With its activities it also follows the current development trends of nautical tourism and the extended tourism offer. Yet, due to the fact that different sectors (civil and public) do not cooperate in the desired intensity, they often encounter the disapproval and unwillingness of the local population to cooperate or at times they even oppose tourism development. This presents an obstacle in the perception of a destination for the guest. The lack of cooperation between tourism service provider and the offer also affects its limited diversity in the wider area. Compared to the rest of the destination, the coastal area has a very efficient system of informing and trading via the electronic media (which is still unmanaged). In the future it is necessary to improve such tools, mostly as regards its usefulness for the guests, the currency of the changes and marketing efficiency for the service providers.

From the foregoing we can conclude that the difference between the coast and the hinterland is present also in the field of marketing. The presentation of the coastal tourist offer includes a wide range of tools, or these tools are used in greater extent. Due to a greater economic activity and higher financial promotional means, the coastal area actively cooperates with the Slovenian Tourist Board, through which it can actively present its offer abroad as well, namely on general and specialized tourism fairs and workshops. The specific characteristics of the landscape and the adventures the tourists can experience within the region are still not used for the purpose of marketing enough, especially for promoting the protected natural areas such as Škocjanske jame - Skocjan Caves protected by UNESCO, Kobilarna (stud farm) Lipica, Karst villages - Štanjel, Koštabona, the area of Nature 2000 in the region of Ilirska Bistrica and similar).

V. THE PRIORITY ACTIVITIES FOR SUSTAINABLE TOURISM DEVELOPMENT

5.1 The Activity Plan According to Strategic Frameworks

OBJECTIVES	PRIORITY PROJECTS	SERVICE PROVIDERS
Strategic Framework 1: Integrated Destination Management		
<ul style="list-style-type: none"> - establish a more effective and competitive destination organisation for development of joint products and integrated marketing with cooperation of the local players from public, private and non-governmental sectors in tourism in joint destination management organisation - ensure a more flexible employability and more attractive employment options in the field of tourism - classification of roles, responsibilities and competence of certain organisations and individuals in tourism development (establishment of tourism development management system) - develop a system of a systematic monitoring of tourism development of the region 	<ul style="list-style-type: none"> - Establishment of a regional destination management organisation - establishment of good employment practice principles for increasing the attractive employment options - organisation of training in skill shortage occupations in tourism and employees' training - establishment of monitoring and measuring sustainable tourism development systems: water, energy, chemicals consumption, monitoring tourism income in the region, measuring the quality of the tourist offer and monitoring the added value in tourism as well as other growth, development and competitiveness indicators of the tourism sector for development need and the needs of monitoring the execution of the development tourism objectives 	<p>RDA - Regional Development Agency, LTO - Local Tourist Organisation and partners from public, private and non-governmental sectors</p>
Development and marketing of new and improved quality of the existing tourism products and services		
<ul style="list-style-type: none"> - construction of 26 tourism products and a minimum of 50 km of thematic tourist trails attractive to the market - construction of a minimum of 2 sites of special interest based on resources (natural, cultural) or artificial attractions for the enhancement of international recognizability of the region (differentiation) - training and investing in service equipment and infrastructure for the increase of the hospitality and other services 	<ul style="list-style-type: none"> - Strategic and implementation plan for marketing and development of sustainable tourism products, destination service - Promotion of sustainable destination orientation and specialized programmes of the subregions: maritime, cultural, ecological tourism - development of sites of special interest originating from natural and cultural resources and/or artificial attractions - Enforcement of marketing and other activities on the cross-border level in order to enhance the accessibility of the 	<p>DMO - Destination Management Organisation</p>

	destination for the global guests who enter the destination from the neighbouring ports (Trieste, Rijeka, Pula), and airports (Trieste, Venice, Pula) and railway stations (Trieste, Rijeka) - quality certification/choice and pilot introduction of quality systems - of ISO and/or EMAS and/or other more suitable systems of the type.	
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OBJECTIVES	PRIORITY PROJECTS	SERVICE PROVIDERS
Effective investing in tourist accommodation and supporting infrastructure in accordance with the principles of sustainability		
<ul style="list-style-type: none"> - investing in complementary infrastructure in the hinterland of Slovenian Istria and in the countryside to eliminate the lack of small family overnight stays capacities according to the new trends, - investing in the increase of the quality and a sustainable characteristic of the existing accommodation structures, - investing in the construction of supporting infrastructure which will raise the limit of the space carrying capacities (purification plants, access roads, car parks, recreation surfaces for "dispersing" the tourist flows and relieve the main tourist points from overburdening during the main seasons, - investing in public supporting infrastructure (sports centres, cultural centres) 	<ul style="list-style-type: none"> - Inshore recreation walkway from Izola to Portorož, including supporting infrastructure facilities along the promenade into an integrated offer - Revitalisation of a minimum of 5 abandoned buildings for tourism purposes - Investing in minor accommodation capacities, especially in the countryside - Investing in accommodation infrastructure for the improvement of the environment (economy of energy, reducing of water consumption and others) - Construction of purification plants for increasing the carrying capacities in tourism - Construction of car parks in the coastal area 	partners from public and private sectorsja
Investing in people, knowledge and employment		
<ul style="list-style-type: none"> - increase attractive employment possibilities and opportunities throughout the year (employments which ensure flexible and optimal forms of work) with different activities for prolonging the tourist season - adaptation of educational programmes to the needs of tourism economy in local and national educational programmes 	<ul style="list-style-type: none"> - training for skill shortage occupations and special qualifications in certain tourism products and services - promoting occupations in the field of tourism to attract foreign workforce where there is a shortage of domestic workers - flexible forms of work schemes (e.g. which enable seasonal employment with the same employer each 	RDA - Regional Development Agencies, DNO - Destination Management

<ul style="list-style-type: none"> - strengthen the attractive side of the tourism and catering occupations - reducing the needs in skill shortage occupations (e.g. for well-being tourist programmes and some recreation programmes) 	<p>year, and benefiting from social rights in the off-season period due to the prolonged extent of work in the season period</p> <ul style="list-style-type: none"> - encouraging the training of the employees in the skill shortage occupations 	<p>Organisation and partners from public, private and non-governmental sectors</p>
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OBJECTIVES	PRIORITY PROJECTS	SERVICE PROVIDERS
Strategic Framework 2: The Accessibility Improvement-Sustainable Forms of Transport, Greater Mobility and Investing in Information Infrastructure		
<ul style="list-style-type: none"> a) abolish the isolation of individual areas with the exploitation of the transit potentials in the neighbouring countries - Italy and Croatia and b) establishment of sustainable traffic regime for reducing the overburdening of a single transport system to the prejudice of others c) arrangement of car parks in the vicinity of railway and bus stations, at the urban centres entrances d) enhancement of energy efficiency in the traffic e) informing the tourists on the possible ways of accessing certain destinations and within it f) encouraging the consumption of sustainable kinds of transport intended for tourists and those employed in tourism <p>- traffic regime management, studying the potentials for alternative solutions regarding</p>	<p>- development of intermodal passenger terminals (a combination of maritime and road or railway and road transport),</p> <p>ROADS</p> <ul style="list-style-type: none"> - re-directing the main traffic flows from motorways to side roads to the distant subregions - Ilirska Bistrica, Karst, the hinterland - balance the road-traffic infrastructure through the border in Ilirska Bistrica - establish steady traffic situation and a friendlier traffic regime in the season period <p>SHIPPING</p> <ul style="list-style-type: none"> - make a better use of the maritime traffic for tourism purposes - construction of a bigger passenger pier in the vicinity of inshore urban centres, - development of the local public transportation by sea and encouraging non-economic private transportation to Italy and Croatia as well - enforcement of the maritime traffic influence to the passenger distribution to the hinterland - encourage the sea connections between the towns of the Northern Adriatic - complement nautical infrastructure (berth in water and to the shoreline) 	<p>The municipalities and the state in co-operation with the private economic sector</p>

the problem of the coastal road, closing of old town centres for traffic, arrangement of green space and other areas of public use, namely the external appearance of a town, placing the lifting equipment on less accessible locations and arranging alternative accesses for those whose organoleptic senses are impaired and also for physically impaired people.

AIR TRAFFIC

- asses and use the potential of bigger airports in Trieste and Pula
- include the Sečovelje airport in the market niche offer
- study the options for a better use of sports airports and smaller aeroplanes, mostly for the guests belonging to the higher price category

RAILWAY

- organize a local access to the destinations for the tourists who arrive by train
- enforce international rail services to the destinations
- study tourism potentials for the railway programmes development for intermodal tourist transportation

TELECOMMUNICATIONS

In the area of user application it is necessary to digitise the contents of the offers to enable the use in different information media (interactive television, mobile technology, navigational systems etc.)

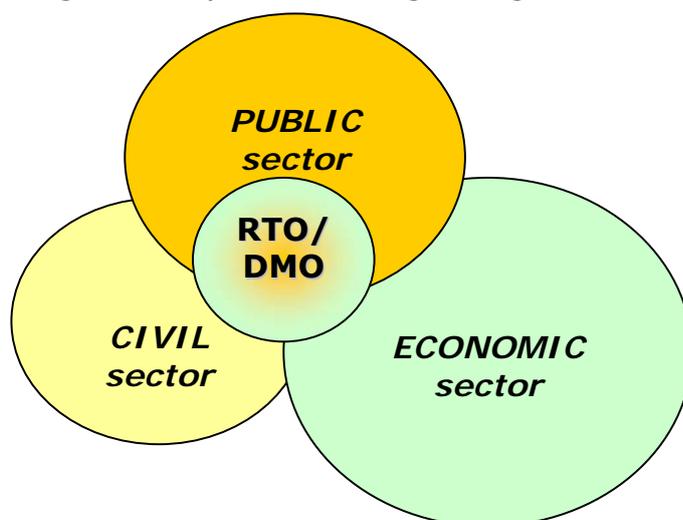
- installation of central information and reservational system for a destination
- administration of electronic and digital media contents for the needs of the integrated tourism development of a destination

OBJECTIVES	PRIORITY PROJECTS	SERVICE PROVIDERS
<p>Strategic Framework 3: Construction of a Supporting Environment for Monitoring Tourism Effects and the Implementation of the Principles of Sustainability</p>		
<ul style="list-style-type: none"> - Construction of an effective system of monitoring, controlling, rewarding and punishing as well as managing crisis situations - Monitoring intersectoral and cross-border influence in the value measurements 	<ul style="list-style-type: none"> - introduction of registers, adoption of the decree for tourist flat-rate payment for holiday apartments and homes and the encouragement for including the above-mentioned capacities into the tourist landscape offer - systematic encouragements for the entrepreneurial initiative in excess demand, innovations in tourism and the development and construction of a system of returning intended assets into tourism for social and development purposes (education, improvement of working conditions for the employees), - development of products and services for the deprived social groups - certification for quality - the choice and a pilot implementation of the quality ISO and/or EMAS systems, and/or other more suitable quality systems, projects in the field of tourism for the preservation of biodiversity and local identity - designing the instruction for sustainable-oriented investments in tourism - establishing the systems for monitoring and measuring sustainable tourism development: consumption of water, energy and chemicals, monitoring tourist income in the region, measuring the quality of the offer, monitoring the added value in tourism and other indicators of growth, development and competitiveness of the tourist sector for development needs and the needs for monitoring the execution of development objectives of this strategy - arranging the system for collecting and recycling solid and liquid waste originating from tourism activities - preparation and availability of analytical tools and data as a support for making business, investment and other strategic development decisions for the tourist landscape development 	

5.2 The Implementation of the Strategy and Activity Plan

For achieving strategic orientation and development objectives, we need a harmonized, linked and effective system of executing tourism development. This can be achieved with efficient tourism development organisation on the regional level within the Regional Tourism Management Organisation (RTO, and after DSSTS (Development Strategy and Slovenian Tourist Directives) - DMO (Destination Management Organisation)), which links different players, not only tourist activities providers but also and above all the holders of tourism development.

Picture 2: Organisation position of DMO (Destination Management Organisation = regional tourist organisations) in coordinating the regional sectors.



As shown above, the Regional Tourist Organisation (RTO or DMO) needs to be in the middle of development interests of the sectors which are active in the environment, coordinate their interests and orient and encourage a harmonized, sustainable-oriented tourism development and marketing.

Of all the sectors, the main role belongs to economy which, with its activity, enables and realizes a specific long-term tourism development, yet its success depends on the cooperation of the other two sectors - the ensurance of legal formality activities as well as all supporting development tools made available to the public sector as also the support of the local population and the proper additional (voluntary) activities of the locals in order to contribute to a pleasant appearance and experience of the destination and a positive feedback from the guests.

The principal role of the future DMO is going to be cooperation of the tourism service providers, public sectors, tourist and other societies as well as other tourism-related players to encourage and coordinate their activities in the following areas:

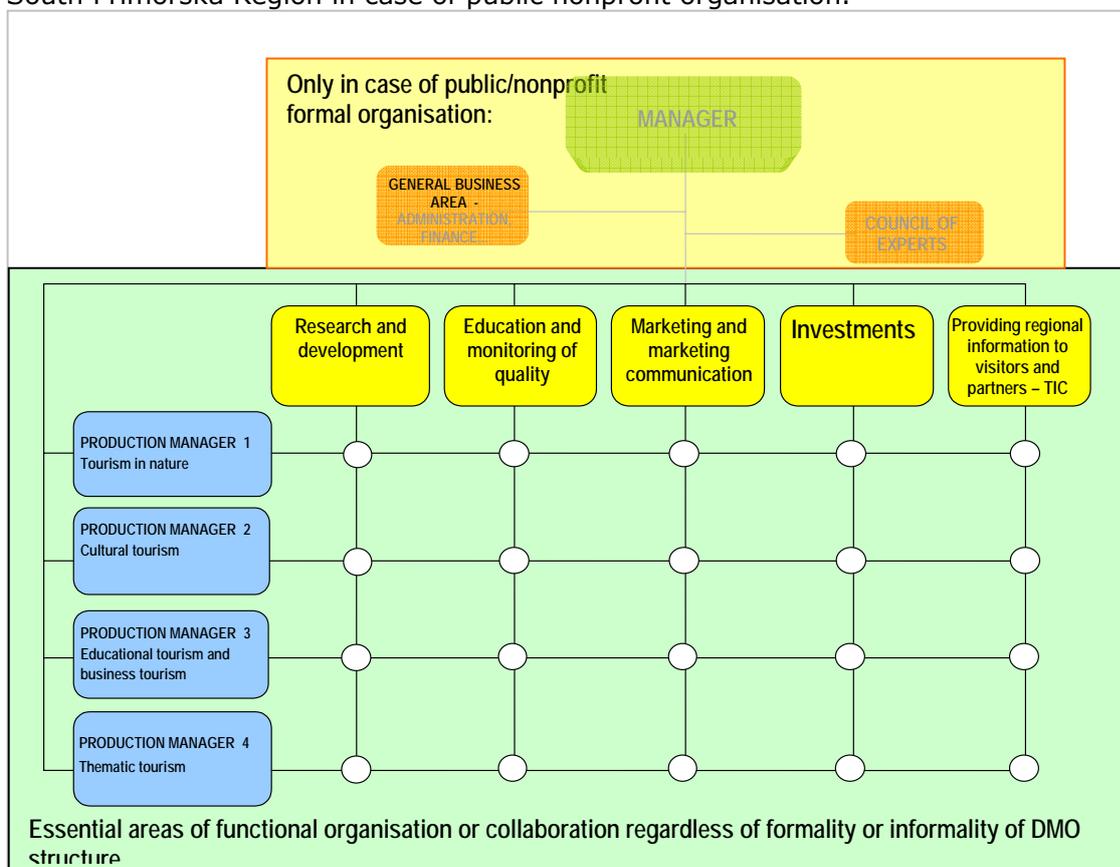
- execution of sustainable and other development projects for establishing new tourism products, including tourist infrastructure
- drawing up, promoting and marketing the integrated tourist offer for the destination,
- development, organisation and maintenance of the central information system,
- coordination, organisation and marketing of the events,
- management of the joint public tourism infrastructure (thematic trails, public areas, accessibility, telecommunication network),

- research, development, education and training,
- ensuring developmental friendly system support (legislation, financing, monitoring tourism activity implementation in sustainable manner).

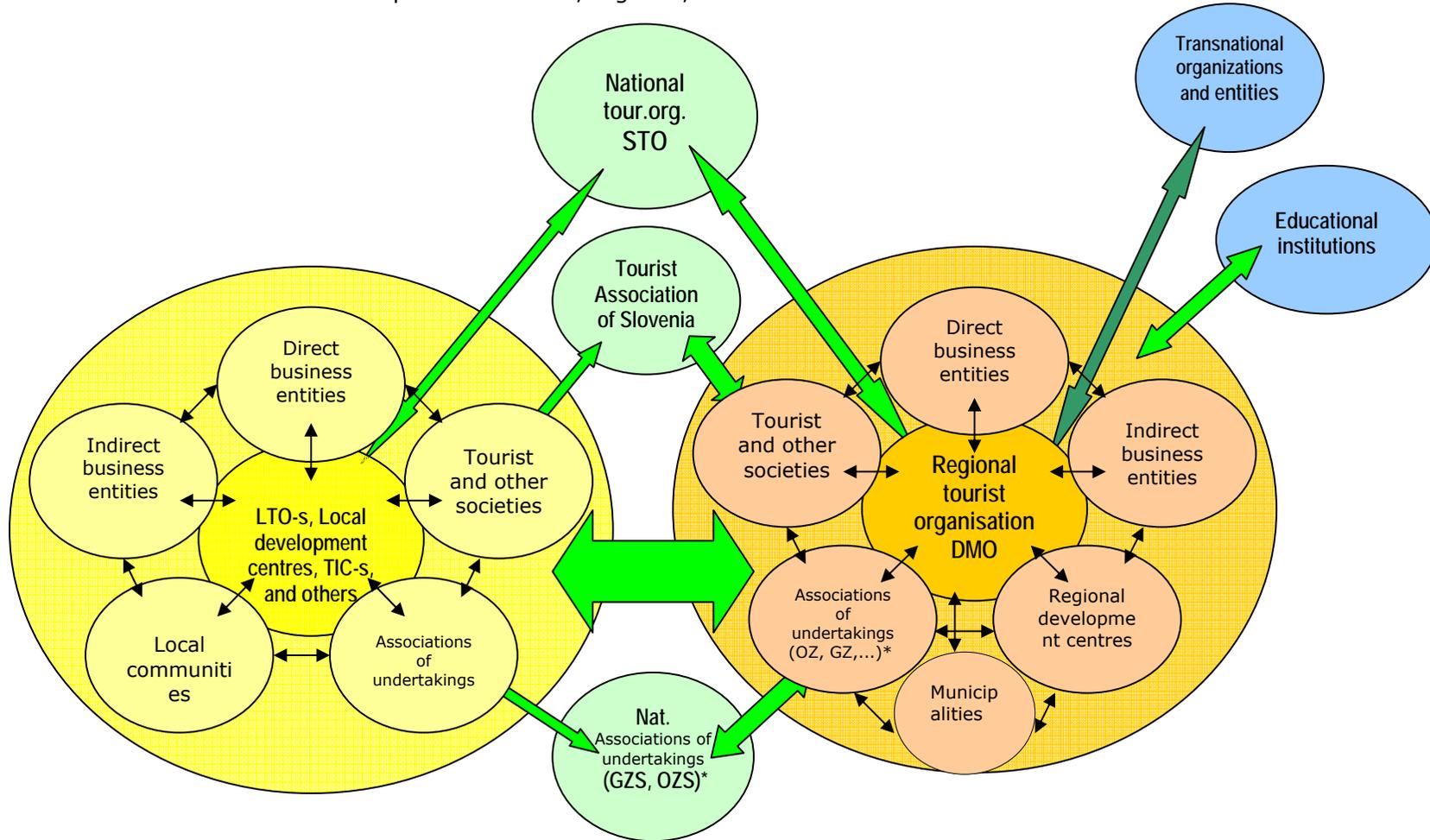
DMO shall involve those activities which enable profit-making activity for non-profit (development) purposes in order to facilitate tourism in the entire area and individual subregions, or their products such as e.g selling receptive, excursion instationary programmes of tourist area, development and traditional and contemporary product sale of certain area (souvenirs) as well as sale and promotion of natural products, organisation and marketing events, management of common tourism infrastructure facilities (individually or in connection with other existent organisations in the area), guidance organisation on thematic trails, licensing and other activities to establish sustainable tourism development and its marketing. They are all in common interest of all tourism actors and residents in the area.

Integrating and cooperating with entities in tourist areas, RTO must enable tourism economy as well as civil society easier realisation of interests and development at regional level. Cooperating with organisations and similar institutions (Slovenian Tourist Organisation, Tourist Association of Slovenia, Chamber of Crafts of Slovenia, Chamber of Commerce of Slovenia, economic interest associations in the area of tourism etc.) at the national level may influence more effective formation of regional as well as national programmes in the area of tourism activity. Moreover, it may influence the inclusion of the regions into significant marketing and development activities in the area of tourism and tourism related activities.

Picture 3: Proposal of functional organisation of regional tourist organisation for the development and management of sustainable tourism development in the area of the South Primorska Region in case of public nonprofit organisation.



Picture 1: Communication model with partners at local, regional, national and also international levels



***OZ (OZS)**- Chamber of Crafts (of Slovenia)
 ***GZ (GZS)**- Chamber of Commerce (of Slovenia)

5.3 Monitoring

Strategy implementation monitoring is performed at several levels or areas. At first mainly in the number of business and public entities who will support the project and will be actively involved in its implementation and in accordance with sustainable development principles harmonise and plan development of their own activities in the framework of resources and limitations of the tourist region.

Marketing success of the existent renewed tourism offer, pursuant to the readiness of economy and local communities, is monitored through indicators of tourism turnover, such as the number of tourists, accommodations, seasonality of supply and demand, the use of tourism capacities and monitoring tourist consumption.

Monitoring environmental sustainable indicators is more complicated or demanding, but at the same time it is not always possible. For this reason, in the future mostly those indicators, where the monitoring system is already established, will be monitored. At the same time the monitoring system of all the so far unmonitored indicators following the examples of successful practice from abroad must also be actively established. This is why it is necessary to adapt the manner of work, regulations and legislation at the national as well as local level. Important indicator of sustainable development success is acquisition of new reasonable and broadly comparable indicators of environmental quality.

In the following strategic period such indicators will be in preparation also at the national level. Among the country measures to establish sustainable principles at "spatial arrangement of tourism development with the aim to ensure optimal spatial conditions for tourism development in compliance with sustainable principles" the development plan and orientation of Slovenian tourism 2007-2011 also anticipates "the development of sustainable tourism indicators with the aim to facilitate development and monitoring of sustainable development implementation and definition of key indicators of sustainable tourism development in various regions".

Representatives of the South Primorska Region or development region must, in accordance with researched and given facts in this document, play an important advisory role in implementation of the recorded in practice.

VI. PRIORITY IMPLEMENTATION PROJECTS 2006 – 2008

ACTION PLAN FOR SUSTAINABLE TOURISM DEVELOPMENT OF THE SOUTH PRIMORSKA REGION 2006-2012 ACTIVITIES AND PROJECTS IN »SUBREGIONS« SLOVENIAN ISTRIA, ILIRSKA BISTRICA AND THE KARST

6.1 Slovenian Istria- orientation and action plan of tourism development of »subregion«

Picture: Slovenian Istra destination



Development Objectives of the Subregion:

1. improvements in quality of the existent services and products with modifications for maximum inclusion of sustainable principles.
2. diversification of Slovenian Istria offer for expansion and improvement of tourism activity considering trends in supply and demand of the competition by:
 - e) upgrading the existent products and development of new quality sustainable tourism products and services
 - f) diversification of the coast offer and Slovenian Istria hinterland with spatial expansion of the coast offer to the hinterland of Slovenian Istria, the Karst and Ilirska Bistrica with Brkini, and across the borders of Italy and Croatia and vice versa (from these areas to the coast)
 - g) implementation of marketing strategies, cross marketing and chain marketing of subregion products, creation of trademarks and enhanced tourist promotion
3. increase the competitiveness of the subregion by means of specialisation – differentiation of offer, considering the principles of sustainable development.

Key Challenges in Slovenian Istria 2006-2012

- coordination of spatial plans with tourism development potentials/needs consistent with sustainable principles
- offer development for extended season and bridging seasonal fluctuation
- enhancement of recreational area mainly in coastal area
- slowing down the traffic and regulation of moving and stationary traffic regime, especially in summer months to reduce traffic jams and improve accessibility
- inclusion of Slovenian Istria hinterland into the coast tourist offer
- coherence and complementarity of offer at the level of municipalities, subregions and destination
- formation of organisational model in order to increase collaboration of public, private and civil sector, and improve coordination among entities within tourism activity

- more aggressive marketing and integration of resources, especially in event marketing and development activities
- attracting private sector into common marketing of the subregion
- balancing the structure of accommodation capacities (make investments into the smaller accommodation capacities: private rooms, family hotels, boarding houses, tourist farms,...).
- improve tourist signalisation and its long-term maintenance and public tourist infrastructure at the level of destination
- use the potentials for the development of rural tourism in Slovenian Istria hinterland by creating marketing interesting products and attractions
- educational tourism
- sports training throughout the entire year

Development Orientation

Strengthening sustainable development by increasing the quality of the existent products, by gradual implementation of sustainable principles. Subregion offers specialisation in the framework of coast tourism programme and investment into the improvement of the most competitive and strategic products of the subregion: nautical products, congress/business tourism and wellness tourism with spa activities.

Priority Development Activities and Projects

- ensure conditions of spatial arrangements for the development of sustainable tourism and for revitalisation of town centres (creation of spatial arrangement plans at the local level considering micro location for the development of sustainable tourism)
- improve accessibility (road, sea, rail and air traffic), the use of telecommunication infrastructure for better accessibility
- formation of tourism products with the aim to extend the season
- improve organisation of subregional management
- balance tourism with other business activities and the use of space consistent with the carrying capacity of the space
- schemes of promoting private holiday apartments rented for tourist purposes (approximately 6000 beds only in Piran municipality!)

Development of Products and Services

- arrangement of network, walking and other trails linked to Parenzano at the coast as well as in the coastal hinterland; in the framework of trail arrangement establishing unified signalisation system consistent with the integrated image of the area and the possibility of adaptation to local images;
- development of new sports-recreational trails and other thematic trails, connecting natural, cultural heritage, gastronomy and other specific characteristics of the destination;
- establishment and construction of eco-tourism farms and tourist farms, inns, private rooms and apartments;
- inclusion of eco-tourism products and cultural products of coastal hinterland into the coastal tourism offer;
- modernisation of the managed bathing areas and management of the bathing areas as well as their adaption to the selected quality standards;
- development of tourist offer in Marina Izola, Simonov zaliv (Simon's Bay), Koper-Izola coastal area, wider hospital area, bathing complex Livada
- Dragonja - St. Peter - Nova Vas – Padna: Development and construction of offer typical for rural area (wine, fruit, oil trails, farms, culinary art, cycling trails, footpaths, horse riding trails, hiking among vineyards)
- »Belvedere, Izola – eastern entrance (Viližan – Ruda),

- Sports-recreational programme and events in town and its hinterland

Investments

- renewal of the old Palace hotel and preparation of the new concept of Portorož city centre;
- construction of golf course (Sečovlje);
- modernisation of Portorož airport;
- investments into parking houses in the framework of traffic arrangement project in the municipality of Piran;
- Jernej channel regulation
- temporary installation of floating piers and regulation of the seashores;
- arrangement of the Izola Street Museum
- revitalisation of Izola city centre
- construction of parking house in Izola
- construction of youth hostel in the municipality of Izola
- arrangement of swimming pool complex "Svetilnik"
- expansion of the Belvedere Hotel and establishment of wellness centre
- construction of new hotel in Simonov zaliv (Simon's bay)
- expansion and modernisation of the Delfin Hotel
- arrangement of the entire coastal area for recreation (bathing, walking...)
- arrangement of the Ankaran Peninsula for tourism development
- pier construction for marine transport passengers
- establishment of Marina Koper and sports-recreational centre Koper
- arrangement of coastal area Žusterna-Ruda, mostly for sports-recreational purposes
- renewal and restoration of cultural heritage, mostly cultural monuments, sacral objects and stimulation of their inclusion into the destination tourist offer
- **integral arrangement of Strunjan as a part of a landscape park and involvement of the local people in the creation of tourist offer**
- **development and quality supplementation of the capacities for youth tourism in Pacug**
- **development of the capacities and programmes for vacation stationary tourism in Fiesa**
- **integral revitalisation of the town of Piran: family hotels, boarding houses, apartments, main outdoor events in Tartini Square, galleries, museums, churches in Piran**
- reduction of traffic in Piran, construction of the south and north parking garages linked to the town
- rearrangement of the salt warehouse in Portorož
- *spatial round-off and programme complement in Portorož – renewal of the old Palace Hotel and arrangement of the area from the hotel to Avditorij (Auditorium), including coastal area (beach)*
- reduction of traffic in Portorož, prohibit parking on the promenade, arrangement of corso
- *arrangement of auditorium area, coastal area and beaches in Portorož*
- *spatial and programme completion of the Metropol Hotel complex – inclusion of the area called Vojkov dom*
- spatial and programme conversion of camp site Lucija – sport, recreation, entertainment programmes
- *regulation of the seashore and exclusive beach on the cape of Seča peninsula with facilities, which may also be used by the local people (with hotel annexes and hotel on the west side with swimming pools as well as wellness and beauty programme, with extra moorings for large boats, communal moorings)*

- *eastern entrance into Portorož-*
- *arrangement of sports recreational objects in the centre of Lucija with accommodations, and social functions: health-care centre, library, market, shopping centre, parking garages*
- *improvement of communal conditions in the area of Lucija (south slope) – location for family boarding houses and high-standard villas*
- *Seča south slope- improvement of communal conditions- renewal and new construction of boarding houses and high-standard villas*
- **Seča- »ex Droga«- Reconstruction of the area for tourist recreational and health activity – programme linked with salt works and natural healing factors – link with St. Jernej channel**
- *south slope Parecag - improvement of communal conditions of the area- renewal and new construction of boarding houses and high-standard villas*
- *St. Jernej channel – restoration of the channel for traffic flow linked to the sea with programmes offering trips to salt works – regulation of the seashore and communal moorings and salt works programmes*
- *Soline, the Sečovelje Landscape Park with natural factors- trips- education –flora – fauna, the Sečovelje mine: rehabilitation of the area of the deserted mine- construction of tourist “attraction” of the coast for children.*
- *traffic regulation: connections and starting point for boat trips, visiting of salt works, golf course*
- *the Sečovelje airport – airport runaway expansion and arrangement of the corresponding facilities*
- *construction of golf course with corresponding facilities and programmes in Sečovelje*
- *the Krog monastery: restoration of the monastery complex and construction of accommodation and other capacities – horse riding activities – connection with golf course*
- *promenade arrangement from Soline to Strunjan with various programmes on relation river mount of Dragonja salt works – the centre of Portorož – Strunjan - Izola*

Accessibility

For the entire development of Slovenian Istria, mostly coastal area, regulation of traffic regime is crucial (parking places, parking garages), establishment of local public transport, sea as well as land transport, closure of old city centres and similar, arrangement of green areas, parks, playgrounds, resting places, promenades and other public areas or external appearance of towns, construction of footpaths and cycling trails, escalators (hospital – coastal promenade, Belvedere – beach and regulation of accessibility for people with disabilities

Marketing

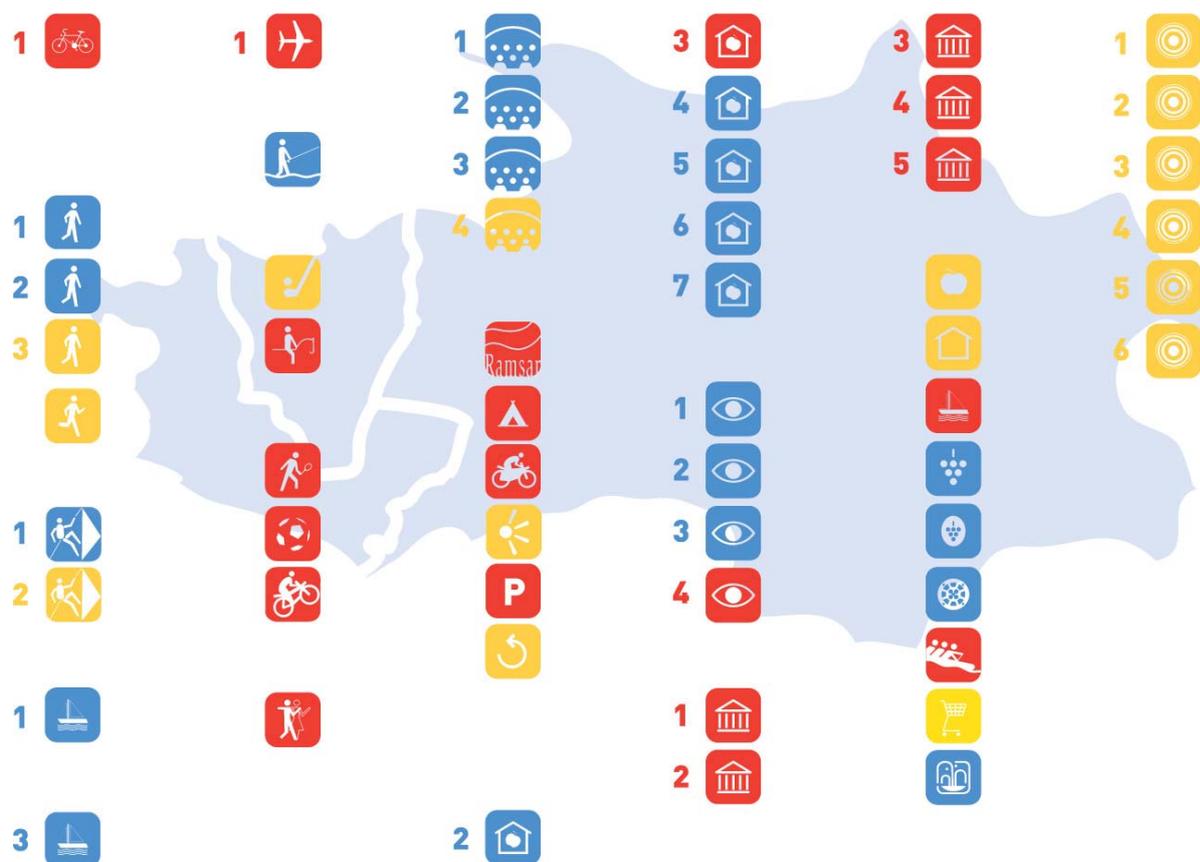
Collaboration of the entities of tourism activity at the local level as well as destination and regional levels, common marketing, establishment of unified information system with the emphasis on fast transmission of information are of crucial importance for the future development.

Destination quality within Slovenian Istria is gradually increasing from 3* to 4* and from 4* to 5*, which signifies not only the quality improvement of hotels and other accommodation facilities, but also the entire tourist offer, as well as services, people and the environment.

Organisation of Subregion

LTO & public-private partnership in the framework of the anticipated organisational structure at the destination level

Slovenian Istria



Strategy of Sustainable Tourism Development of South Primorska - Summary

Legenda

SPORTS AND RECREATIONAL TOURISM

CYCLING



1 Trekking



2 Mountain and adrenaline

TREKKING

1 Walking



2 Trekking (recreational footpaths, mountain trails)



3 Nordic walking and other forms



RUNNING

SPORT CLIMBING



1 Natural rock wall climbing



2 Artificial wall climbing

WATER SPORTS (sea or land waters)

Swimming, scuba diving, surfing,



2 Rafting, kayak, canoe



3 Sea nautical sports: sailing, paraski, skiing, scooter

AIR SPORTS



1 Sport aviation



2 Gliding and skydiving, hang-gliding

SEA FISHING

HUNTING, FISHING, PHOTO-HUNTING, CLAY PIGEON SHOOTING

GOLF

HORSE RIDING

SPELEOLOGY

TENNIS

PREPARATION OF SPORTSMEN

MOTOCROSS

SKIING, CROSS-COUNTRY SKIING

EVENTS AND PARTIES

BUSINESS TRIPS

BUSINESS MEETINGS



2 SEMINARS AND CONFERENCES



3 CONGRESSES



4 BUSINESS AVIATION

ROUND TRIPS

VISIT OF CULTURAL AND NATURAL HERITAGE, NATURA 2000

CAMPING

BIKING

TOURS IN SLOVENIA, CROATIA, ITALY

REST ON THE WAY (TRANSIT)

CRUISING



Obstoječi proizvodi, ki se tržijo



Obstoječi proizvodi, obstajajo v
zametkih, nenačrtno ali sploh
niso trženi



Potencialni proizvodi, še ne razviti

RELAXATION AND REST



1 HOLIDAYS IN HILLS, IN THE KARST, BY THE LAKES, CAVES



2 SEA-SIDE VACATION



3 FARM, COUNTRYSIDE VACATION



4 FAMILY VACATION



5 WEEKEND VACATION



6 VACATIONS FOR SENIORS



7 WELLNESS

YOUTH TOURISM



1 OPEN-AIR SCHOOLS



2 WORKSHOPS, RESEARCH AND DISCOVERIES



3 STUDY TRIPS



4 STUDENT EXCHANGE

CULTURAL TOURISM



1 PERMANENT AND TEMPORARY EXHIBITIONS



2 WORKSHOPS OF ARTISTS, LOCAL CRAFTSMEN



3 CULTURAL EVENTS, FESTIVALS(»POP CULTURE«)



4 MOVABLE AND IMMOVABLE CULTURAL HERITAGE



5 »LIVE« CREATIVE ART

THEMATIC TOURISM, TRAILS AND PARKS

EKO TOURISM (SPECIALISED PART OF SUSTAINABLE T.)

COUNTRYSIDE TOURISM

NAUTICAL TOURISM

VINE, FRUIT TRAILS AND OTHER THEMATIC TRAILS
(cultural, historical, forest, study etc.)

ENOGASTRONOMY

CASINO TOURISM

ENTERTAINMENT AND ADRENALIN PARKS

SHOPPING

HEALTH RESORT, CLIMATE TOURISM

PRODUCTS CONSISTENT WITH TRENDS AND/OR CREATING TRENDS



1 Cruising (and inland trips)



2 Attractions: the Island of Izola, entertainment centres/adrenalin,
entertainment, eco etc. natural and artificial parks and recreation and
entertainment areas)



3 Religious tourism



4 Speleologic (in connection with the Karst Museum)



5 Botanical



6 Zoological

6.2 The Karst- Directives and Action Plan of Tourism Development of the "Subregion"

Picture: Karst destination



Development Objectives

Tourism development of the Karst subregion will emphasise **uniqueness** and will be based on regional features marked by the tradition and/or high amenity. Development of highly professional form of tourism and its offer with a high value added for the selected target groups in the demand of certain tourist services.

The objectives of sustainable tourism development in the Karst are therefore:

1. structural and sustainable balance of the disparities in the development of tourism in the Karst subregion
2. quality improvement of the existing services and products with modifications for maximum inclusion of sustainable principles
3. development of new quality services/products for the expansion and reinforcement of tourism activity considering supply and demand trends of the competition
4. stimulate the variety of the Karst offer (diversification of offer) with spatial/destination expansion of the Karst tourist offer across the Italy border, cross marketing and chain marketing of products with other subregions and
5. increase of global competition of the South Primorska destination by promoting unique products based on speleology and specialised programmes such as for example cultural tourism (all forms of tourism connected with it)
6. increase in the extent of tourism activity considering sustainable development principles.

Challenges

- deconcentration of accommodation capacities in individual centres with the increasing use of the existing capacities in compliance with spatial carrying capacity and construction of accommodation capacities where permitted and reasonable from the perspective of sustainable development (mostly in rural areas)
- quality increase of hotels from 2* to 3*stars to 3*, 4* or 5* stars and adjustment of hotel infrastructure to the trends (mostly demographic), considering sustainable principles
- development of research, school, sports tourism, especially in out-of-season period
- better connection and collaboration between individual tourist service providers and increase the creation of new integral tourism products

- development of efficient organisational structure at the level of subregion with the purpose of connecting all entities of tourism activity, implementing common promotions and marketing of the subregion, information activities, coordination and organising events as well as cohesion of subregion with the other two at the destination level
- strengthening informational support to improve the flow of information and identification and accessibility.
- construction or connection and common chain and cross marketing of the Karst tourist offer within the subregion and in the framework of wider area of South Primorska with connection to Brkini offer and other surrounding places.
- acquisition and training of the staff required, mainly from areas of deficiency to the area of individual tourism products
- arrangement of competence and responsibility regarding management, maintenance and financing of public infrastructure
- supporting corporate culture in the area of tourism and active approach to the development and encouraging innovations
- stimulating the creation of quality and recognisable souvenirs and trademarks at the subregion level

Development Orientation

Due to the need for the diversity of offer (diversification), which helps to reduce risks and dependence on season, and due to the need for better identification of the offer of the entire South Primorska destination, especially the Karst subregion (differentiation), we propose the following:

- a) to strengthen the benefits of the Karst subregion competition on a unique product of speleology (the Škocijan Caves, karstology, speleology, wellness in caves)
- b) marketing segmentation of offer within the programme of cultural tourism⁸ due to exceptional cultural monuments in the area (Lipica, Štanjel)

Gradual enforcement of sustainable tourism development with adaptation and increasing improvement of the existing quality of products and services as well as creation of new ones, consistent with sustainable objectives. For this purpose the following forms of sustainable tourism will be developed in the Karst:

products: unique speleological, gastronomic, health, hunting, horse riding

programmes: cultural tourism in connection with countryside, special forms of recreation, specialised conferences (and attracting conference guests from other Slovenian destinations to visit cultural sights and unique natural and other competitive products of the Karst).

Priority Development Activities and Projects

- investments into people for sustainable, quality and trend tourism with higher added value
- investments into sustainable cross-border tourism infrastructure, improvement in quality of accommodation capacities and improvement of accessibility
- attracting investors to make investments in sustainable tourism development projects
- develop/modernise existing key products and recognised tourism areas of the Karst (Lipica, the Škocjan Caves, Postojna; speleology, horse riding...) and types of tourism (cultural, research, school, countryside...)

⁸ World Tourist Organisation defines cultural tourism as traveling due to cultural motives. Cultural tourism comprises study trips, experiencing contemporary art, cultural trips, trips to festivals, visits of monuments and historical attractions, folklore events and pilgrimage routes.

- developing new products based on resources and innovations, considering the trends and sustainable aspects
- improvement of accessibility to products and areas within the subregions (physical and virtual accessibility)

Development of Products and Services

- arrangement of the Divača town centre, modification of Škrateljnova house in the museum of Slovenian film stars (Ita Rina);
- development of Kobilarna (stud farm) Lipica and traffic regulation, restoration of the facilities of stud farm activities, restoration of cultural heritage objects, improvement in quality of the existing hotels, establishment of tourist information centre;
- establishing Štanjel as cultural educational and business centre of high quality: renovation and revitalisation of the Štanjel Castle and establishment of enotheque, the hotel in Štanjel, alternative health resort centre located in the house by the Tower of Štanjel (Kobdiljski stolp), new tourist information centre in Štanjel;
- establishment of sports-recreational centre Letališče Gabrk (Airport Gabrk) with the emphasis on aviation, hang-gliding, gliding and establishment of the accompanying offer;
- arrangement of thematic and recreational trails as well as study trails
recreational trails: cycling (mountain and trekking), hiking or walking, horse riding trails
- installing benches, waste bins, toilets consistent with the environment and the entire visual image of the area, resting places, parking places (i.e. also for bicycles), adjustment of catering offer with the concept of recreational trail marketing and its inclusion, accommodation capacities specialised for cyclers, hikers,..., sports gear renting. While planning the trail, the connection with thematic and recreational trails of the neighbouring municipalities, areas, destinations should also be anticipated, with the aim to connect offers, common marketing, and increasing competitiveness in comparison with other comparable destinations.
- arrangement and establishment of information signalisation system consistent with the visual image of the area, subject to signalisation (notice boards, general or greeting information boards, tourist signposts, internal orientation boards on individual trails, descriptive boards);
- restoration and arrangement of individual tourist points (cultural, natural, sacral...), i.e. arrangement of the old Karst villages such as Dutovlje, Tomaj,... and make them attractive for the visitors
- arrangement of the Divača city centre, museum of Slovenian film stars at Škrateljnova house, arrangement of cultural and educational centre, arrangement of TIC
- establishment of sports-recreational centre in Gabrk with the emphasis on aviation and arrangement of the accompanying infrastructure connected with sports, recreation, other leisure activities, adrenalin sports...
- arrangement of tourist centre in Senožeče with the emphasis on brewing, restoration of cultural heritage
- development of tourism in Vremščica (hang-gliding, skydiving, hiking, recreation)
- marketing of specific gastronomic features of the area with the emphasis on sheep breeding, fruit growing in Brkini, organic farming
- establishment, supplementation and arrangement of thematic trails in the municipality of Divača
(cycling, hiking, mountain, study, fruit, literary, horse riding, culinaric) and arrangement of resting places)
- arrangement of museum collection of mining in the Vremška Valley
- development of sports and recreational activities by the Reka river

- arrangement of mill Ukna by the Reka river;
- expansion of the Škocjan Cave Park into the south-east part of the municipality of Divača – towards the village of Dane

Investments

- formation of a specific centre in Sežana and its development into diagnostic-rehabilitation centre with hypotherapy and speleotherapy (in connection with Sežana hospital, construction of cluster houses with additional offers); renewal of the existing hotels in Sežana; development of casino tourism in Sežana;
- modernisation of Glinščica landscape park by establishing tourist information centre and naturalistic – educational trail along Glinščica landscape park;
- arrangement of Škocjan Caves landscape park and villages, renewing the tourist information centre and establishing naturalistic centre 3;
- construction of small hotels (up to 50 beds, minimum 3*), smaller family hotels, guest houses, bed & breakfasts, tourist and eco farms, private rooms and apartments in the whole area;
- transportation from railway station in Divača to tourist points
- establishment of camping areas in the municipality
- arrangement of the infrastructure in the Divača Cave
- renewal and modernisation of water reservoirs under plateau Vremščica
- renewal of cultural heritage (sacral – 15th century frescos in Gradišče, Vremenski Britof, and technical – water supply Draga, icehouses, mills...)
- arrangement of village cores in the Divača municipality,
- arrangement of youth hotel

Accessibility

- setting up safe access from the tourist part of the Škocjan Caves to the Mahorčič Cave and access to Matavun;
- opening of other parts of Škocjan caves when ready to be visited;
- establishment of multipurpose area in Matavun no. 8;
- settling of parking areas in Škocjan Caves Park;
- modernisation of TIC in Škocjan Caves Park by opening a multimedia hall;
- support of Škocjan Cave Park in preparing projects and execution plans to establish camping areas outside the protected area of Škocjan Caves Park (Dujčev mlin, Divaški Gaberk);

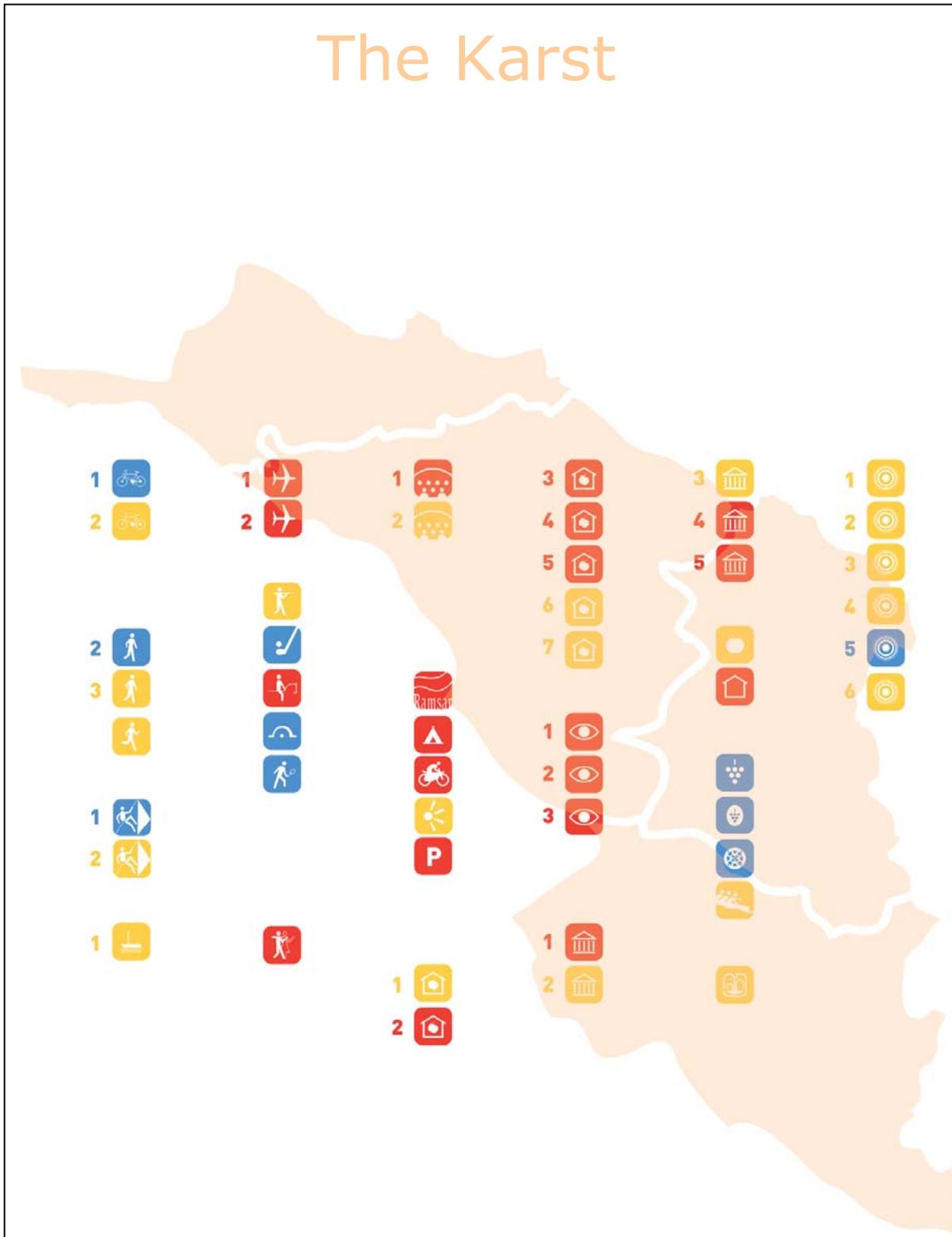
Marketing

- strategic and executive marketing plan for the development of new permanent and trendy products and adjusting existing markets as well as target marketing with new marketing communication tools
- creation of Karst trademarks and promotion
- implementation of chain marketing and cross marketing of Karst products and services with neighbouring tourist »subregions«
- establishment of local craft shops, eco markets,
- collaboration of Škocjan Caves Park in promotional programmes of influential areas (Ilirska Bistrica and other surrounding municipalities)
Collaboration of Škocjan Caves Park in the promotion at the international level and with neighbouring tourism service providers (also bordering) - (Glinščica, the municipality of Dolina, Doberdob and other areas);

Organisation

LTO & public-private partnership in the framework of the anticipated organisational structure at South Primorska destination level

The Karst



Strategy of Sustainable Tourism Development of South Primorska - Summary

Legend

- SPORTS AND RECREATIONAL TOURISM**
- CYCLING**
- 1 Trekking
 - 2 Mountain and adrenaline
- TREKKING**
- 1 Walking
 - 2 Trekking (recreational footpaths, mountain trails)
 - 3 Nordic walking and other forms
- RUNNING**
- 1 Running
- SPORT CLIMBING**
- 1 Natural rock wall climbing
 - 2 Artificial wall climbing
- WATER SPORTS (sea or land waters)**
- 1 Swimming, scooba diving, surfing,
 - 2 Rafting, kayak, canoe
 - 3 Sea nautical sports: sailing, paraski, skiing, scooter
- AIR SPORTS**
- 1 Sport aviation
 - 2 Gliding and skydiving, hang-gliing
- SEA FISHING**
- 1 HUNTING, FISHING, PHOTO-HUNTING, CLAY PIGEON SHOOTING
- GOLF**
- 1 Golf
- HORSE RIDING**
- 1 Horse riding
- SPELEOLOGY**
- 1 Speleology
- TENNIS**
- 1 Tennis
- PREPARATION OF SPORTSMEN**
- 1 Preparation of sportsmen
- MOTOCROSS**
- 1 Motocross
- SKIING, CROSS-COUNTRY SKIING**
- 1 Skiing, cross-country skiing
- EVENTS AND PARTIES**
- BUSINESS TRIPS**
- 1 BUSINESS MEETINGS
 - 2 SEMINARS AND CONFERENCES
 - 3 CONGRESSES
 - 4 BUSINESS AVIATION
- ROUND TRIPS**
- 1 VISIT OF CULTURAL AND NATURAL HERITAGE, NATURA 2000
 - 1 CAMPING
 - 1 BIKING
 - 1 TOURS IN SLOVENIA, CROATIA, ITALY
 - 1 REST ON THE WAY (TRANSIT)
 - 1 CRUISING

- Existing marketing products
- Existing products, at their very beginning, unplanned or are not marketed at all
- Potential undeveloped products

- RELAXATION AND REST**
- 1 HOLIDAYS IN HILLS, IN THE KARST, BY THE LAKES, CAVES
 - 2 SEA-SIDE VACATION
 - 3 FARM, COUNTRYSIDE VACATION
 - 4 FAMILY VACATION
 - 5 WEEKEND VACATION
 - 6 VACATIONS FOR SENIORS
 - 7 WELLNESS
- YOUTH TOURISM**
- 1 OPEN-AIR SCHOOLS
 - 2 WORKSHOPS, RESEARCH AND DISCOVERIES
 - 3 STUDY TRIPS
 - 4 STUDENT EXCHANGE
- CULTURAL TOURISM**
- 1 PERMANENT AND TEMPORARY EXHIBITIONS
 - 2 WORKSHOPS OF ARTISTS, LOCAL CRAFTSMEN
 - 3 CULTURAL EVENTS, FESTIVALS(»POP CULTURE«)
 - 4 MOVABLE AND IMMOVABLE CULTURAL HERITAGE
 - 5 »LIVE« CREATIVE ART
- THEMATIC TOURISM, TRAILS AND PARKS**
- 1 EKO TOURISM (SPECIALISED PART OF SUSTAINABLE T.)
 - 1 COUNTRYSIDE TOURISM
 - 1 NAUTICAL TOURISM
 - 1 VINE, FRUIT TRAILS AND OTHER THEMATIC TRAILS (cultural, historical, forest, study etc.)
 - 1 ENOGASTRONOMY
 - 1 CASINO TOURISM
 - 1 ENTERTAINMENT AND ADRENALIN PARKS
 - 1 SHOPPING
 - 1 HEALTH RESORT, CLIMATE TOURISM
- PRODUCTS CONSISTENT WITH TRENDS AND/OR CREATING TRENDS**
- 1 Cruising (and inland trips)
 - 2 Attractions: the Island of Izola, entertainment centres/adrenalin, entertainment, eco etc. natural and artificial parks and recreation and entertainment areas)
 - 3 Religious tourism
 - 4 Speleologic (in connection with the Karst Museum)
 - 5 Botanical
 - 6 Zoological

6.3. Ilirska Bistrica – Tourism Development Strategy and Action Plan for the “Subregion”

Picture: Ilirska Bistrica destination



Development Objectives of the Subregion:

1. Establishment of tourist offer considering sustainable principles and trends in demands and supplies,
2. taking advantage of the existing predispositions for tourism development and enhancing the visibility of tourist offer within the subregion, among other two South Primorska subregions, cross-border and wider (national and international level).

Key Challenges in Ilirska Bistrica

- improving road traffic accessibility
- controlling negative demographical trends by attracting people in the region and preventing brain-drain
- raising the level of education in tourism to improve staff structure, population age structure
- investing in specific technical and functional knowledge and continual training of staff working in tourism
- strengthening the cooperation among all entities related with tourism activities to improve the organisation of tourism acceleration activity management
- establishing key bodies of active tourism development policy
- ensuring system resources for marketing activities, education and other development activities
- improving the structure of accommodation capacities and investing in improvement and construction of new tourism infrastructure
- attracting investors and improving input conditions
- developing basic and complementary tourism offer by exploiting natural and cultural conditions considering exceptional opportunities of permanent and trendy tourism development, especially eco tourism and rural tourism
- improving information flow and accessibility through signalisation infrastructure and other instruments to direct visitors and tourists
- ensuring sustainable maintenance of existing sport, recreation and other infrastructure on the thematic trails
- designing quality and distinguishing souvenirs, trademarks, marketing of typical countryside products
- strengthening collaboration among different tourism service providers which can lead to new integral tourism products

- using chain marketing and cross marketing for tourism offer in Ilirska Bistrica within the subregion and within the broader area of South Primorska to which the offer of Brkini, Snežnik mountain chain and other surrounding areas will be also attached
- encouraging the creation of quality and distinguishing souvenirs and trademarks at the level of subregion

Development Strategy

Development strategy includes setting up the competitive advantage based on ECO-tourism⁹ as marketing program for differentiation of the offer, with products and services related to discovering the nature of this area, such as mountaineering, hunting, fishing and photo safari. For this reason the tourist offer of Ilirska Bistrica should be oriented at designing such tourism products which include adventures, education and presentation activities (e.g. story telling, photo safari, multi-visions and multimedia presentations, guided tours, surviving in the nature etc.). Above all, it is about such tourism products and services that can ensure employment for local inhabitants, who manage and protect those natural areas.

Priority Development Activities and Projects

- establishment of sustainable accommodation capacities
- accessible infrastructure
- attracting investors (preparing investment memorandums)

Development of Products and Services

- eco-tourism product development in the area of the Karst Edge with Karst features of Čičarija and Podgrad valley in the framework of the planned bordering tourism zone with Croatia, which includes protected areas of animal and vegetal habitat, water surfaces, lakes Klivnik and Mola, recreation potentials and the valley of the Reka river with technical heritage of mills and saws
- establishment of tourism and sport-recreation centres
- development of complementary offer (catering industry, souvenir shops, typical products sold at bio markets, equipment rental and other trading services directly and indirectly linked with tourism activities)
- establishment of thematic and recreation trails and educational paths as special tourism products of the subregion. Cross marketing and chain marketing in relation to other complementary thematic trails within South Primorska and neighbouring Croatia
- recreational trails: cycling (mountain biking and trekking), hiking (in the mountain trails, trekking trails, lowland walks, horse riding trails, running tracks (Mašun-Sviščaki)
- preparing the trails and paths includes installing benches, waste bins, toilets in compliance with the environment, visual image of the area, resting places, parking places e.g. for bicycles, inclusion of catering industry and its compliance

⁹ By the definition of World Tourist Organisation Eco-tourism comprises all forms of tourism involving nature and the basic motive for tourist visits is observation and admiring nature as well as traditional cultures, especially in natural environments. It comprises education and presentation activity for visitors and supports natural environment protection by:

- a.) creating economic benefits for local inhabitants, companies and organisations, managing and preserving natural areas,
- b.) creating additional employment possibilities and thus additional income or income for the local community
- c.) promoting awareness of the inhabitants and tourists of the meaning and preservation of natural and cultural assets

with recreation paths marketing, accommodation capacities for bikers and hikers..., sports equipment rentals

- establishment of information and signalisation system in compliance with visual image of the area (notice boards, general – welcome boards, tourist signposts, internal signposts on various trails, information boards);
- renewal of various tourist points (cultural, natural,...) as special attractions of Ilirska Bistrica subregion, enrichment of South Primorska eco-tourism
- establishment and modernisation of thematic and educational trails in the municipality
- development of sports and recreational activities by the Reka river and accumulation lakes

Investments

- Construction of a larger 4* apartment hotel with “wellness” centre Mašun and complementary offer;
- Arrangement of alpine settlement Sviščaki as sports and recreation centre with smaller 3* hotel (up to 50 rooms), inclusion of already existing complementary offer and modernisation of ski slopes;
- Arrangement of village Knežak as cultural and educational business centre with other complementary activities (village renewal, tourist farms or boarding houses up to 10 rooms, culinary program, recreation, cultural heritage);
- Arrangement of garni hotel with approximately 25 rooms in Ilirska Bistrica;
- Prem village sanitation (revitalisation of deserted houses) and arrangement of the area with smaller 4* lodging facilities; arrangement of the castle for cultural, educational and business activities; arrangement of multi-program museum of Prem heritage at primary school; modernisation of TIC
 - arrangement of multi-program museum of Prem heritage at primary school;
 - 4* apartment hotel, up to 50 beds
 - arrangement of the cafeteria with souvenir shop and TIC
 - eco tourism farms
 - horse riding school
- camp site and auto camp site by the lake Mola with sports and recreation infrastructure;
- formation of specific tourist centre Gomanci, based on the following elements: natural environment suitable for recreation and sport, micro climate suitable for preservation and restoration of health, nature and services as excursion point, reachable from coastal tourist destinations and transit excursion location with establishment of the following infrastructure: forest farm, restaurant with capacity 120 + 80; forestry museum, 60 tourist apartments; medical – health resort centre and other complementary offers;
- establishment of eco tourism farms (Ilirska Bistrica, Knežak, Jelšane, Prem, Podgrad)

Accessibility

- reinforcement of road transport access by signalisation system and maintenance of road connections within South Primorska region
- reinforcement of marketing activities for better virtual accessibility with the use of modern technologies (multimedia presentations of eco tourism products), acceleration of mobility to and within the subregion and strengthen the area identity within the South Primorska region

Marketing

- trading the area of Brkini with its orchards, tourist farms, village Prem and the Prem castle as cultural-historical monument (cultural product)
- strengthening international visibility and already established positive image of Snežnik mountain chain destination with unique habitats and excellent view of the Adriatic sea, Mašun and Sviščaki, interesting, attractive and suitable for recreation as well as peaceful relaxation
- chain marketing and cross marketing of new tourism products in combination with other complementary products within the destination and neighbouring subregions and cross border
- designing trademarks of Ilirska Bistrica and promotion of Ilirska Bistrica as destination and subregion
- establishing visibility of eco tourism area within South Primorska

Organisation

LTO & public-private partnership in the framework of the anticipated organisational structure at South Primorska destination level

Strategy of Sustainable Tourism Development of South Primorska - Summary

Legend

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- TREKKING
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- HUNTING, FISHING, PHOTO-HUNTING, CLAY PIGEON SHOOTING
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- HORSE RIDING
- SPELEOLOGY
- TENNIS
- PREPARATION OF SPORTSMEN
- MOTOCROSS
- SKIING, CROSS-COUNTRY SKIING

EVENTS AND PARTIES

BUSINESS TRIPS

- 1 BUSINESS MEETINGS
- 2 SEMINARS AND CONFERENCES
- 3 CONGRESSES
- 4 BUSINESS AVIATION

ROUND TRIPS

- VISIT OF CULTURAL AND NATURAL HERITAGE, NATURA 2000
- CAMPING
- BIKING
- TOURS IN SLOVENIA, CROATIA, ITALY
- REST ON THE WAY (TRANSIT)
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- Existing marketing products
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RELAXATION AND REST

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- 2 SEA-SIDE VACATION
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- 5 WEEKEND VACATION
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YOUTH TOURISM

- 1 OPEN-AIR SCHOOLS
- 2 WORKSHOPS, RESEARCH AND DISCOVERIES
- 3 STUDY TRIPS
- 4 STUDENT EXCHANGE

CULTURAL TOURISM

- 1 PERMANENT AND TEMPORARY EXHIBITIONS
- 2 WORKSHOPS OF ARTISTS, LOCAL CRAFTSMEN
- 3 CULTURAL EVENTS, FESTIVALS(»POP CULTURE«)
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- 5 »LIVE« CREATIVE ART

THEMATIC TOURISM, TRAILS AND PARKS

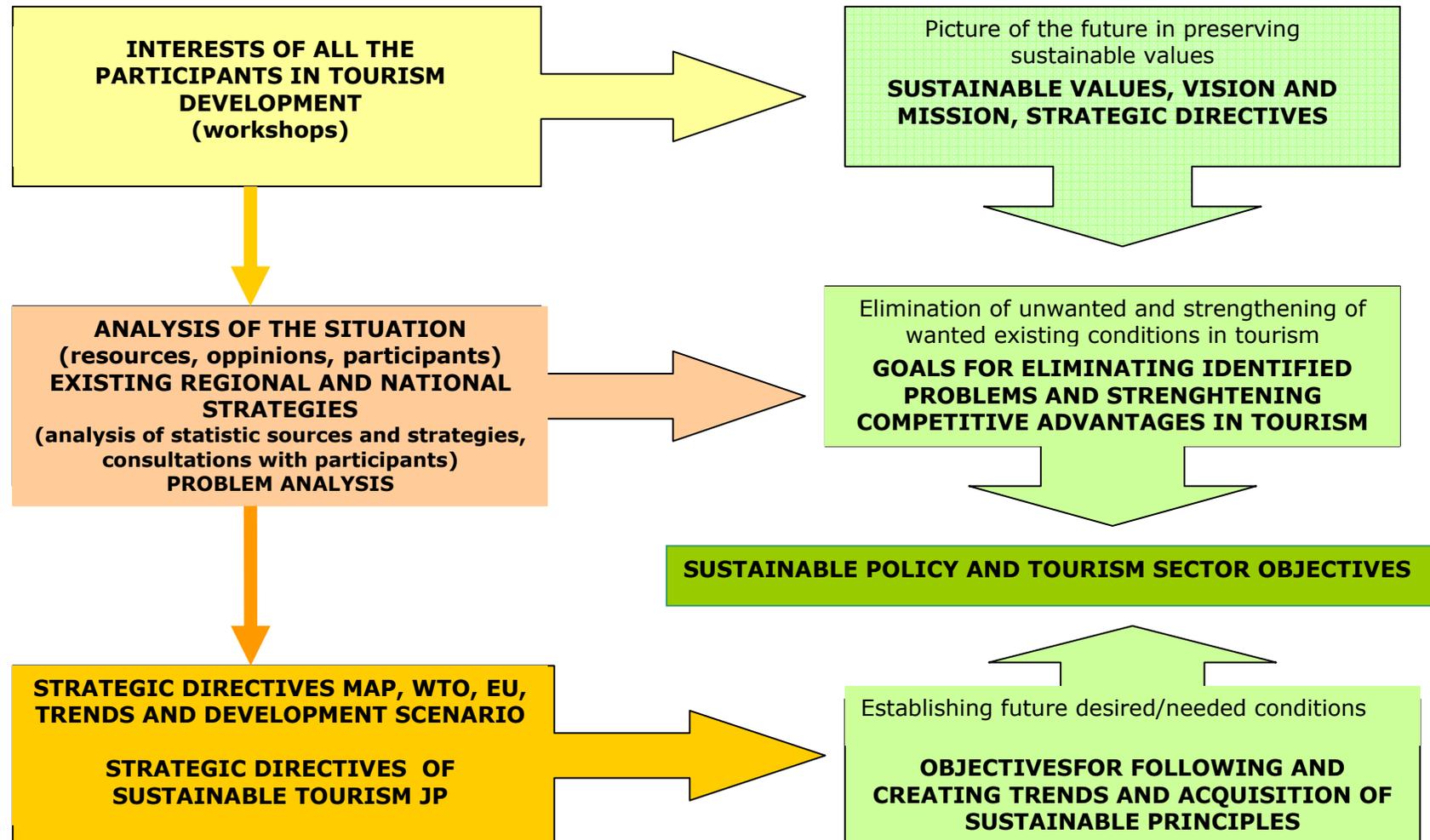
- ECO TOURISM (SPECIALISED PART OF SUSTAINABLE T.)
- COUNTRYSIDE TOURISM
- NAUTICAL TOURISM
- VINE, FRUIT TRAILS AND OTHER THEMATIC TRAILS (cultural, historical, forest, study etc.)
- ENOGASTRONOMY
- CASINO TOURISM
- ENTERTAINMENT AND ADRENALIN PARKS
- SHOPPING
- HEALTH RESORT, CLIMATE TOURISM

PRODUCTS CONSISTENT WITH TRENDS AND/OR CREATING TRENDS

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- 5 Botanical
- 6 Zoological

VII. EXECUTION AND CONTROL

Process of Preparing the Strategy



Apart from the contractor of Regional development centre Koper as the representative of local community interests in South Primorska, other key actors from public sector in the area of tourism (municipalities, local tourist organizations), representatives of some non-governmental organization, tourism companies, sectoral and professional public organizations and inhabitants of this area collaborated in the development of the strategy. Participants in the development cooperated by contributions at the workshops within project CAMP and especially at the workshops and presentations of different preparation stages as part of the development strategy in September 2005, November 2005 and June 2006.

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