

Employment trends in all sectors related to the sea or using sea resources

Slovenia



European Commission
DG Fisheries and Maritime Affairs

An exhaustive analysis of employment trends in all sectors related to sea or using sea resources

Country report – Slovenia

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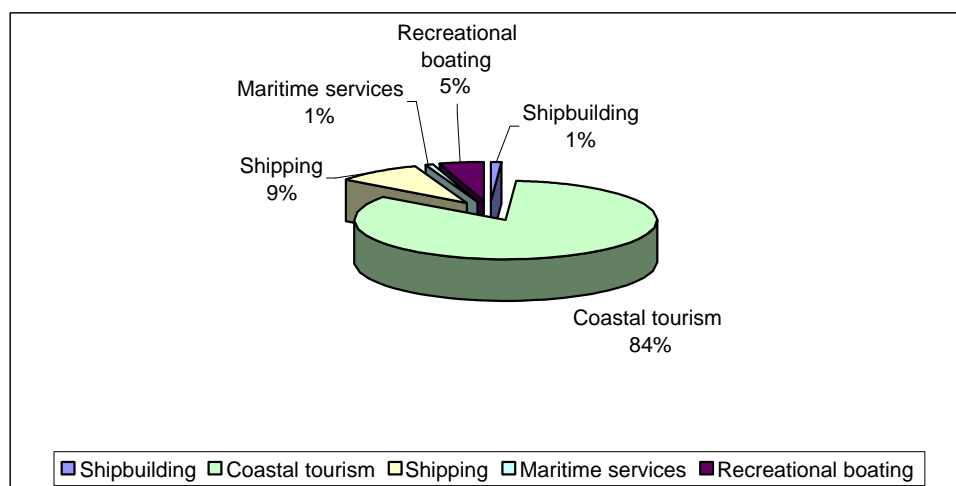
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1.0 Summary¹

From the traditional maritime industries in Slovenia shipping is clearly the largest maritime sector, followed by recreational boating. The shipbuilding industry plays only a marginal role with just 200 employees. Coastal tourism is by far the largest employer in the sea related industries making up 84% of total employment with nearly 14,000 workers.

Figure 1.1 Share of employment in sea related sectors, 2005



Note that coastal tourism figures refers to 2003 and recreational boating to 2004

The shipping industry and coastal tourism are demonstrating the strongest growth potentials. Employment in the wider Slovenian travel and tourism economy has been projected to grow by 5.7% over the next 10 years.

Table 1.1 Employment in sea related sectors, 2003-2005

	2003	2004	2005
Shipbuilding	-	-	200
Shipping	-	-	1,443
Maritime services	-	-	150
Recreational boating	-	760	-
Coastal tourism	13,850	-	-

Source: ECOTEC Research & Consulting, 2006

¹ This report excludes employment related to fishing.

2.0 Shipbuilding

There is only one small shipyard in Slovenia, in Izola. It employs less than 200 workers. The general economic situation of Slovenia was difficult during the early 1990s because of the break-up of the former Yugoslavia. The shipbuilding industry was also affected as a result, with a huge drop in employment of as much as 75%. Today shipbuilding plays a negligible role in the national economy.

3.0 Maritime services

The Faculty of Maritime Studies and Transport (FPP) is an integral part of the University of Ljubljana that employs over 2,150 academic staff and has over 27,000 students. The number of people working in the maritime studies faculty is not expected to be more than 150.

4.0 Shipping

The Slovenian maritime transport sector ships around 18million tons of cargo annually and the sector is experiencing a trend of fast growth.

According to the information from the Slovenian Maritime Directorate, there are 1,443 active seafarers in Slovenia of which 623 are officers, 280 radio-communication personnel and 540 active ratings. Of all active officers, 152 are masters and 308 are engineers. Trade union estimations from Slovenia are very much on the line with statistics from the Directorate. According to their estimations there are approximately 1,450 seafarers active in Slovenia of which around 43% are officers.

5.0 Seaports

There are two ports for cargo vessels in Slovenia but no information was available on employment in these ports.

6.0 Recreational boating

According to a study carried out by the British Marine Federation (2004) the recreational boating industry generated 760 jobs in 2004 of which 230 were related to boat building, and 155 to marine equipment manufacturing. Nearly half of all employees from the industry (375) were involved in trade and support services for the sector.

7.0 Coastal tourism

Tourism is set to become one of the leading sectors in the Slovene economy in this century. A planned investment cycle of €1.5 billion presents an important national, regional, local and marketing possibility for economic development. The aim of the development of Slovene tourism is to increase annual tourism turnover to €1.6 billion.

The tourism sector in Slovenia today does not represent more than 0.3% of tourist visits in Europe. But tourist activity in Slovenia still contributes more than SIT 400 billion of total turnover, or 9.1% of the country's GDP, and employs 52,500 people, including in hotels, restaurants and leisure activities (2003 figures). Hence tourism represents one of the key economic activities in Slovenia.

Slovenia has only 46.6 kilometres of coast covered with abundant vegetation, and providing a natural resource of marl and sandstone. The unique Strunjan cliff, which rises 80 metres above the sea, is the highest cliff wall on the Adriatic coast. Four main cities along the coast attract visitors: Koper, Izola, Piran and Portoroz. The coastal regions of Slovenia are host to approximately 26% of tourists in the country (see below).

Table 7.1 Number of overnight stays in Slovenia

Number of overnight stays			
	Domestic	Foreign	TOTAL
Julian Alps	351,949	1,230,747	1,582,241
COAST	942,716	1,059,286	2,002,002
Karst	34,711	210,508	245,219
Pohorje and surroundings	302,434	244,289	546,723
Ljubljana and surroundings	49,115	530,069	579,184
Savinjska region	552,426	357,983	910,409
Pormuje region	386,059	368,917	754,976
Dolenjska in Bela Krajina	558,268	268,358	826,626
Carniola	44,834	86,019	130,853
Zasavje	3,897	6,607	10,504

Source: Slovenian Tourism Board (2004) *Slovenian tourism in numbers 2004*

7.1 Employment

The tourism sector employed 52,500 people in 2003, but no further breakdown is available by region¹. On the basis of the fact that 26.38% of overnight stays are in the coastal region, a general assumption could be made that approximately 26% of tourism related employment would also be in the coastal regions. This would amount to 13,850 persons. It however must be emphasised that further studies are recommended to assess the real employment effect of coastal tourism.

In the 1990s the Slovene tourism industry experienced a period of stagnation. This was caused mainly by the Balkan war and unstable political relations with neighbouring countries, denationalisation, excessive institutionalisation of tourist activities and unsuitable tourist development policies and a crumbling and underdeveloped tourist infrastructure. But in recent years there has been an increase in tourist arrivals, mainly from neighbouring countries such as Italy but also more widely from other EU countries.

7.2 Employment projections

According to the European Tourism Satellite Accounting, the employment projections are relatively moderate in comparison with many other EU countries. According to these projections, employment in the Slovenian travel and tourism industry is expected to grow by 2.6% by 2016 and the number of jobs in the wider travel and tourism economy by 5.7%.

Even though the coastal region of Slovenia is short in comparison to other EU countries with a seafront, the share of coastal tourism from total tourism related employment in the country is fairly significant. Consequently, the predicted growth in tourism employment can be expected to apply to coastal tourism.

7.3 Skills and training

There is a great need for training among tourism workers. If the tourism industry wants to be competitive and meet EU quality standards, the training system must be improved. There is also a need to portray tourism as a new and promising employment niche to young people, to encourage them to develop a deeper interest that goes beyond hotels and catering. More than shortages in terms of the number of employees, however, there are gaps in terms of the level and quality of skills at all levels (management, accommodation, tourism organisations).

¹ Slovenian Tourism Board (2004)

Lastly, it has been reported that the attitude towards tourism need changing from the perceived image only as hotel and catering activities towards more comprehensive notion embracing a range of services - such as sport, recreation and commerce.