COUNTRY PROFILE: SLOVENIA

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INTRODUCTION

Mai 1st 2004 was an historic day for Slovenia, who became a member of the European Union.

As the enlargement of EU is still very recent, most of the following figures, found on the Internet, consist of a comparison between Slovenia, and the 9 other new EU members, and the 15 original EU member countries. Even if Slovenia and the 9 other NAS (*New Associated States*) are now fully integrated members in the EU, little information and few studies on the present-day EU are available on the Internet.

Slovenia (20 000 sq kms), strategically located between Austria, Italy, Croatia and Hungary, is the only EU member from former Yugoslavia.

Source: Government of the Republic of Slovenia

According to the most recent Slovenian Census in 2002, there are an estimated 1 964 036 people living in Slovenia. The capital – Ljubljana – has around 250 000 inhabitants.

Since the 1991 Census, the population has increased by 2.6%, not as a result of a natural increase but thanks to immigration from abroad and the legalisation of residency of former Yugoslav citizens who already lived in Slovenia during the period of the 1991 Census. The Slovenian population is ageing (According to Eurostat, 15.4% of the population is under 15 years old, 70.1% between 15 and 64 years of age and 14.5% are over 64 years old). With the fertility rate at 1.2 children per female, amongst the lowest in Europe, demography will eventually pose a major problem in Slovenia. The official language is Slovenian, but Hungarian and Italian are also official in the regions where these minority groups are predominant.

In Slovenia, the inhabitants benefit from good conditions for obtaining training and later a job**.** University graduates represent a high proportion and 14.8% of all people aged between 25 and 64

have higher education. More than 11 000 students graduate annually from university level education. The unemployment rate in 2002 represented 6.4% of the population.

The Slovenian economy is one of the most prosperous of the new EU members with a GDP *(Gross Domestic Product)* in 2002 amounting to €23 billion, a solid GDP growth – averaging 4.3% over the past eight years – and a GDP per capita of €16 990 which represents about 70% the EU average. Slovenia is among the countries with the smallest public deficit. However, persistently high inflation is an issue that remains to be tackled (7.5% in 2002).

Slovenia hopes to enter the euro zone in 2007, which would change the local currency, the Tolar, (international abbreviation: SIT) which has only recently been created.

According to Eurostat, service industries represented 61.8% of GDP in Slovenia in 2002, industry constituted 35.2% of GDP and agriculture accounted for 3% of GDP.

After attracting relatively little foreign direct investment at a level of about 1% of GDP, Slovenia has recently been successful in obtaining significant foreign investment and the overall level of FDI *(Foreign Direct Investments)* has increased to over 2% of GDP in 2002.

Slovenia enjoys strong trade and co-operation links to Germany, Italy, France and Austria. Main exports include machinery and transport equipment, chemicals, footwear, furniture and other household goods. Slovenia has a high level of trade integration with the EU. About 59% of Slovenian exports go to the EU and 68% of imports come from the EU.

INFRASTRUCTURE

Slovenia has, for a long time, been making considerable investments to develop its telecommunications network. Analogue networks were fully replaced by digital switches and fibre-optic cables by the end of 2000. Today the network has reached **a very high technical and commercial level, equivalent to that of the best European counterparts**.

The modernisation of the telecommunications network enables citizens, companies and the Slovenian government to enjoy **a high penetration level of new communication tools**. The Slovenian population is well equipped in basic ICTs: fixed telephones, mobile phones, PCs and Internet connections.

1996	1998	1999	2000	2001	2002	
						Share of households with:
24	35	42	46	47	58	*personal computers*
3	9	15	21	24	37	*access to the Internet*
83	92	93	96	95	91	*phone lines*
6	20	43	75	79	82	*mobile phones*

Statistical Office of the Republic of Slovenia - 2003

However, the telecommunications deregulation is still too recent to guarantee full operating capacity to competitors in the Slovenian telecommunications market.

1-   Telecommunications Market

According to the 2003 ATRP report, the Slovenian telecommunication market of approx. €811 million annual revenue, which represents around 2.6% of the GDP, is regarded a mid-size market compared to other NAS countries.

a) Regulations

Slovenia has recognized the importance of development and use of ICT in assuring rapid development of the information society overall. The Ministry of Information Society has been established in 2001 to regulate ICT-related issues in Slovenia and promote further development of the information society overall.

❖ **The telecommunications market in Slovenia eased its restrictions on 1st January 2001** and the Slovenian Parliament adopted a new law in telecommunications in May 2001 to replace the 1997 legislation, giving detailed rules of the liberalized market, opening the sector to new competitors, and encouraging the development of new networks and services.

This new law includes two main measures:
- the creation of an independent agency concerning regulations in the telecommunications sector *(ATRP- Agencija za telekomunikacije, radiofuzijo in posto).* This entity, whose leaders are appointed by the State, is the telecommunications market national regulatory authority. The Agency is responsible for delivering licences for telecommunications services and it handles litigation between different operators, between operators and users, and between operators and the Agency itself.
- the organisation of the unbundling of the local network: the official services must check that the dominating operators in the market lease a part of their networks to their competitors.

ATRP duly monitors the advancement and development of the telecommunication market and maintains registers of all licensed telecommunications companies. They publish the status of the market in annual reports.

b) Operators

❖ Telekom Slovenije *(TS)* was set up as a public limited company in 1995 following the separation of telecommunications and the Post Office. With roughly 3000 employees, TS directly exploits its fixed network, in which the company continues to maintain a dominant position.

TS is composed of three subsidiaries:
- MOBITEL for mobile telephony,
- SIOL for Internet access,
- GVO, for maintenance of telecommunication cable networks.

The TS capital belongs to the State (66.52%), Investment Funds (24.71%) and private funds (8.77%). The TS turnover in 2002 was €366 million, with earnings of €21.57 million, which represented 6.57% more than the previous year.

The privatisation of TS has been regularly postponed for the last few years and should not begin before 2005. Even if the sale of individual companies in the Group is a possibility, the Government would rather opt for privatisation of TS as a Group with a first opening phase of 25% of the capital. In April 2002, TS was estimated to be worth 500 billion Tolars, which is roughly €2.23 billion. Several foreign Groups have already shown an interest, including Deutsche Telekom, France Télécom and Swiss Telekom.

c) The Market

ATRP maintains the register of all licensed telecommunication companies in Slovenia, which is also accessible on their portal. According to this information (May, 2004), there were 118 companies registered for providing different types of telecommunication services in Slovenia.

❖ **Fixed Telephony:**

The monopoly of the historic operator, Telekom Slovenije, has ceased to exist legally and new players/operators, such as NOVISCOM and VOLJATEL have entered the market. They have, however, not yet managed to offer their services and compete with TS's market predominance.
On the other hand, the competition has developed in the area of VoIP service (22 registered providers in 2003) and international transmission network providers that offer international calls (11 registered providers in 2003) through the TS network. International calls only represent 6% of all Slovenian telephone calls but their high tariffs generate significant income for TS. New operators will, therefore, have to make competitive offers in the market for international calls so as to capture some of TS's historic market share.

The challenge for TS will be determined by the further unbundling of the local network. This process will provide opportunity for ATRP to test its capacity to ensure further competition on the Slovenian market for fixed telecommunications.

❖ **Mobile Telephony:**

Decrees to allocate licences for the use of radio frequencies for mobile telephony and voicemail services, as well as for technical requirements imposed on cell phone systems, have been adopted. The penetration rate in mobile telephone services is very high with a figure of 87.8%.

Number of mobile telephones per 100 inhabitants:

1995	1998	1999	2000	2001	2002	
1.4	9.9	32.6	57.2	75.8	87.8	Mobile (sub+prepaid) per 100 hab

Source: Stat.si

Slovenia has four mobile telephone operators:

- Mobitel, TS subsidiary established in 1991, boasts 1 260 000 subscribers and holds 75% of the market share,
- Si.Mobil – Vodafone, subsidiary of Mobilkom Austria, holds 19% market share,
- Debitel Slovenia has 4% market share,
- Vega - Western Wireless International represents 2% market share.

UMTS *(Universal Mobile Telecommunications System)* network operation has been in a public test phase since December 2003 and represents a huge potential for further development of mobile services.

The only existing UMTS provider is mobile operator Mobitel (licensed since November 2001) - one of the first operators to offer commercial UMTS in the world, which has recently claimed positive user experience and has announced further network expansion. The main priorities at the first stage of operations are inter-operability with other UMTS networks in the EU, smooth roaming between UMTS and GSM networks, and provision of multimedia and data services. For the latter, Mobitel has set up a multimedia portal called Planet which offers a special set of content and services including news, sport, information, leisure, fun, location-based services (LBS) and others. There is also a special area for UMTS users called Planet UMTS, which has been chosen by more than nine thousand users, which means that there is a growing and genuine interest in UMTS.

In the near future National Regulatory Authority (ATRP) could publish a public tender for new UMTS entrants to enable further competition.

❖ **Acces to Internet:**

SIOL, a subsidiary of Telekom Slovenije, was established in 1996, two years after Internet was introduced. With 120 000 subscribers per month, the company has the lion's share of the Internet market for both private individuals and companies.
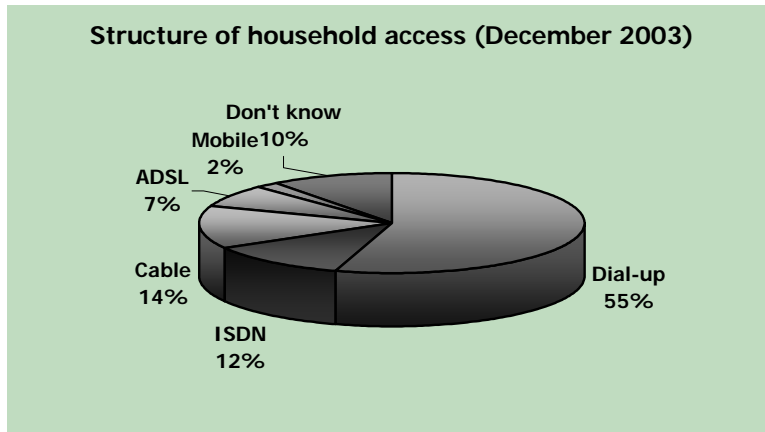
The number of competitive suppliers has dropped, from 33 in 2000 to 22 in 2002, with only three providing ADSL technologies (SIOL, AMIS, K2.NET). Nevertheless, Slovenia still has a large pool of Internet access providers:

http://www.amis.net	http://www.k2.net	http://www.siol.net	http://www.telemach.net
http://www.arnes.si	http://www.moj.net	http://www.slon.net	http://www.triera.net
http://www.attglobal.net	http://www.netsi.net	http://www.softnet.si	http://www.volja.net
http://www.butn.net	http://www.s5.net		

Arnes *(Academic and Research Network of Slovenia),* set up in 1992, is an academic network, whose role it is to connect the research institutes, universities, schools and other Slovenian educational organisations with research networks located in other countries around the world. This supplier has roughly 40 000 users.

Slovenians have a preference for the modem as a means of connecting to Internet. Introduction of ADSL *(Asynchronous Digital Subscriber Line)* is recent and commercialisation began in February 2001. Consequently, Slovenia is below EU average in ADSL connections per 100 inhabitants.

According to ATRP 2003 report, there were some 60 000 broadband connections in Slovenia of which ADSL represented around 66% and cable connections around 34%. Within the ADSL segment, household connections represented around 66%.

Structure of household access (December 2003)

Don't know 10%
Mobile 2%
ADSL 7%
Cable 14%
ISDN 12%
Dial-up 55%

Source: RIS, January 2004

However, according to the ATRP 2003 report, there has been a strong increase in ADSL connections during 2003 of around 129%. In addition, SiOL has reported 50 000 ADSL users at the end of May 2004 and the association of cable operators reported some 24 000 cable connections in April 2004. This data clearly shows that while dial-up remains the main access type within households, broadband connections are gaining ground.

2- Slovenians and Internet

Several factors have made Internet development easy in Slovenia: traditionally high interest in using and applying the information society technologies and relatively high (above EU average) PC penetration in households and companies from the early 90s.

a) Internet population

❖ According to data from the Ministry of Information Society, there has been a strong increase in the number of Internet users in Slovenia over the last few years (tripling from 15% in 1999 to 45% in 2003) and it has caught up to the average rate in the European Union. Using the Internet is becoming a daily activity
   o Daily usage : over 40%
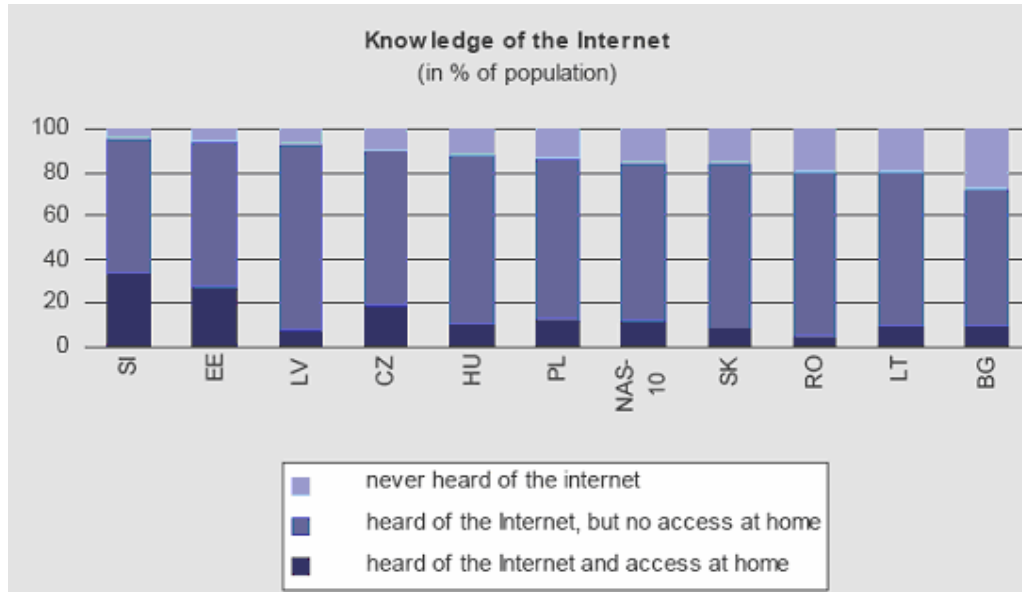   o Weekly usage: over 80% of users.
Households are embracing the Internet: almost every second household has an Internet connection.

Growth of net users in Slovenia:

Source: RIS, EU 2003 estimate

8
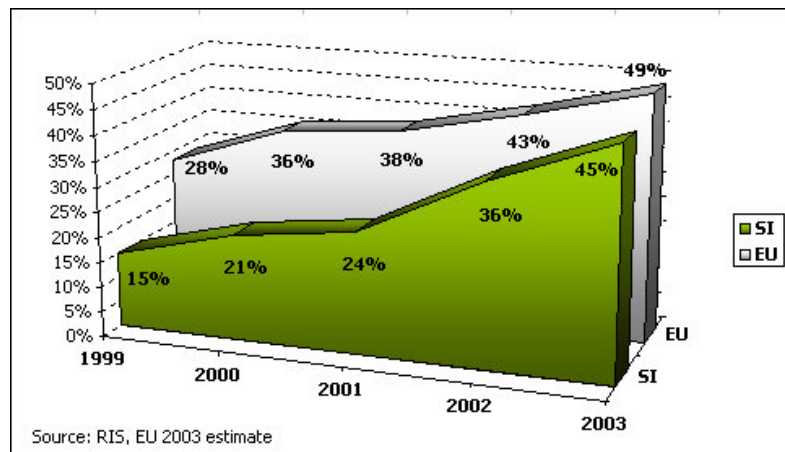
❖ According to the project RIS (Research on Internet in Slovenia) conducted in 2003, Slovenia is the leading NAS country in general knowledge about the Internet: the share of the Slovenian population which has never heard of the Internet is three times lower than in the total NAS population (Slovenia 4% vs. NAS-10 15%).

Knowledge of the Internet
(in % of population)

■ never heard of the internet
■ heard of the Internet, but no access at home
■ heard of the Internet and access at home

SIBIS-RIS, Country Report Slovenia, 2003

❖ Concerning general Internet usage, Slovenia is ahead of some EU countries (Italy, Spain, France, Portugal, and Greece). Almost 38% of the population state that they use Internet regularly (last 4 weeks). There is a correlation between access to the Internet and regular use of this communication tool.

Internet usage
(in % of population)

■ regular usage (last 4 weeks) ■ occasional usage (last 12 months)
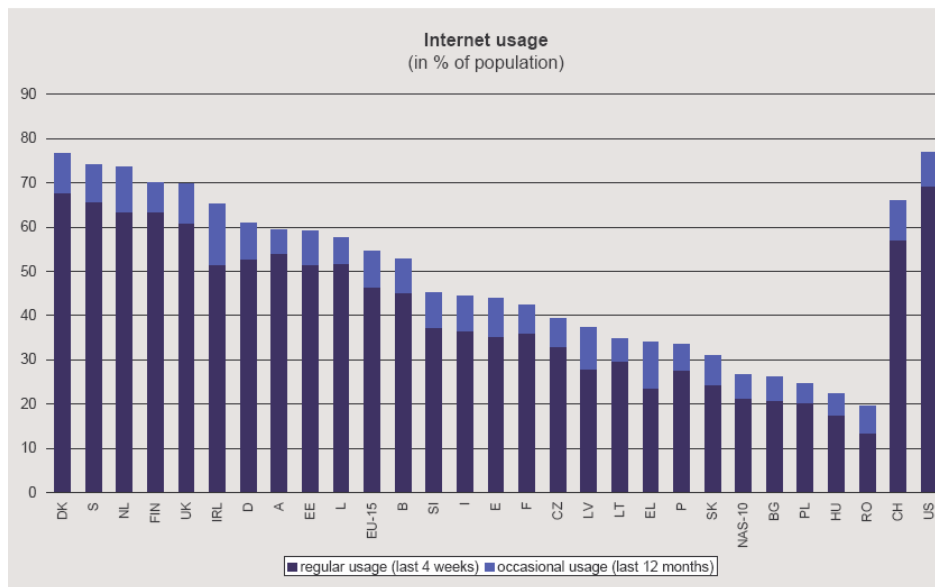
SIBIS-RIS, Country Report Slovenia, 2003

❖ In the EU, 40% of the population regard themselves as very or fairly confident in identifying the source of information on the Internet. With this indicator, Slovenia is immediately below the EU average, with 39% of the population very or fairly confident. A similar percentage (and difference)

is obtained for confidence in using a search engine to find information (Slovenia 41% vs. EU-15 45%). 46% of the EU population regard themselves confident in communicating with others by using e-mail (Slovenia 37%).

Slovenia is ahead of the EU average in understanding the content of web sites, with 36% of the population confident (EU-15 29%). A similar 10% gap exists with downloading and installing software into a computer (Slovenia 23% vs. EU-15 33%).

With more advanced applications (using Internet chat rooms, creating personal web pages, and using the Internet to make telephone calls) the percentage of the population confident in using them decreases. Here, Slovenia is lagging behind the EU average, by up to 6%.

Internet skills
(in % of population)
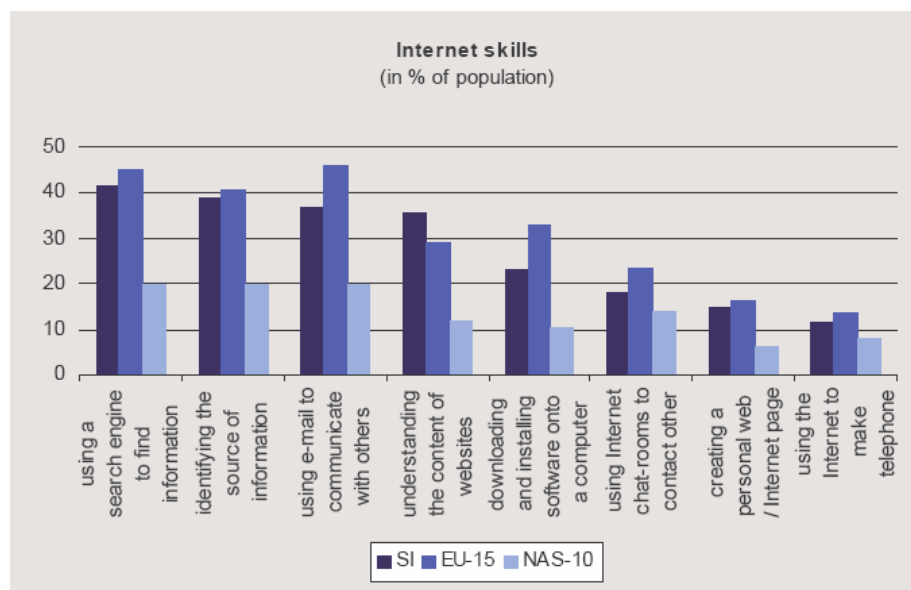
SIBIS-RIS, Country Report Slovenia, 2003

❖ The ability to communicate with others via the Internet is a basic skill in the Information Society. 39% of the Slovenia population is confident in communicating via the Internet, which is below the EU average (47%).

Skills at communicating via the Internet
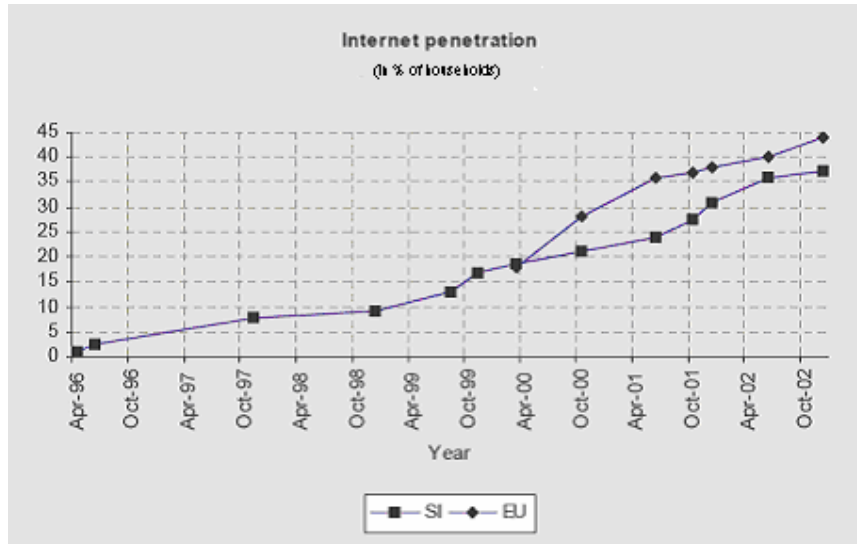(E-Mail, Internet chats, personal web page; in % of population)
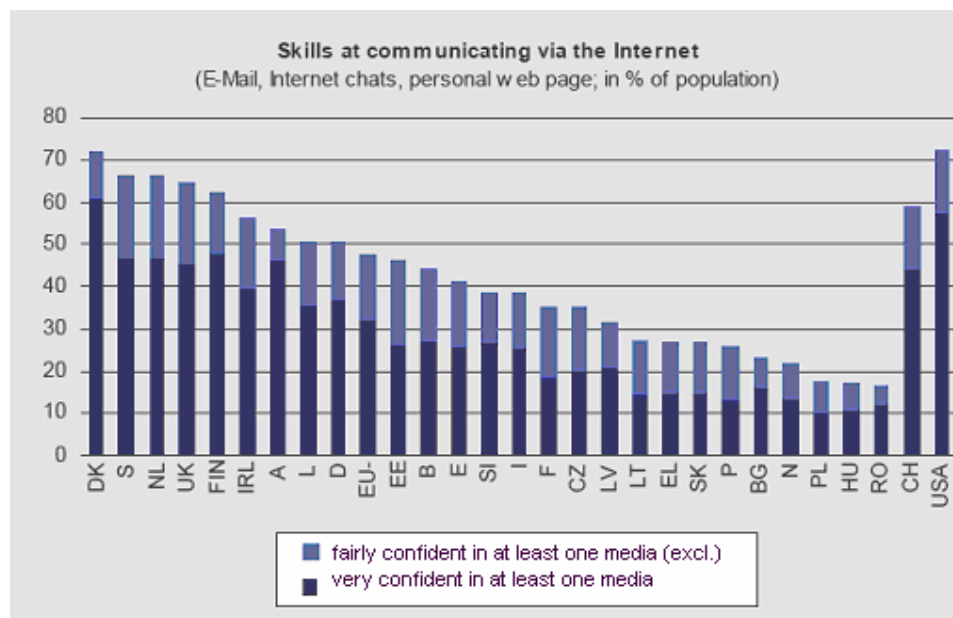
SIBIS-RIS, Country Report Slovenia, 2003

b) Internet usage

❖ **Home access**

The Internet penetration rate in Slovenian homes has witnessed continuous growth since 1996:

Project RIS, University of Ljubljana - 2003

In general, the most widespread usage of the Internet in Slovenia is to search for information (91% of regular users) and to obtain games and music (29% of users).
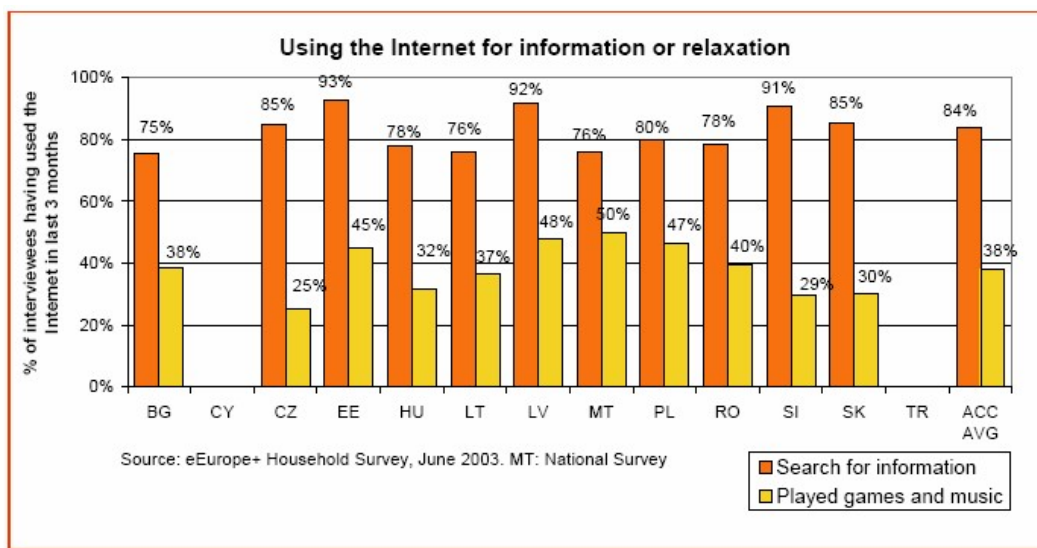
The use of the Internet for communication purposes is also one of the main activities, with just over 79% of users claiming that they send and receive e-mail. 24% of users claim that they use the Internet to participate in chat rooms and discussion forums.
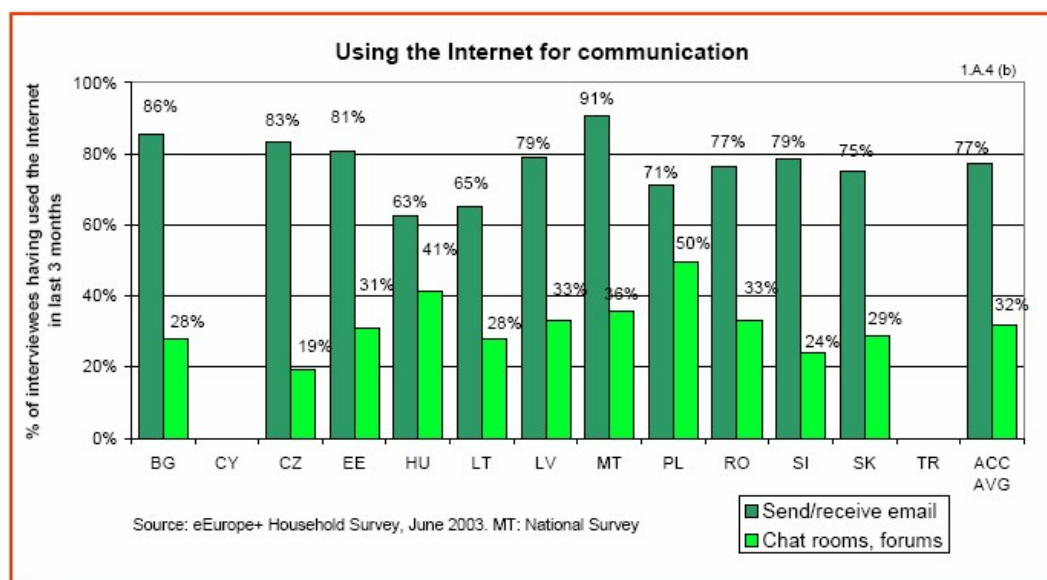
❖ **Work access**

Most Slovenian enterprises are connected to Internet:

Access to the Internet (%) 2002	
96	_Small enterprises_
99	_Medium-sized enterprises_
99	_Large enterprises_

Project RIS, University of Ljubljana – 2003

However, Slovenian companies do not make use of the capacity that Internet provides. According to the RIS project published in 2003, only 38% of all large companies and 34% of small and medium-sized companies in Slovenia declared, in 2002, that they regularly used computers. The number of computers per 10 employees is 3.1 in large companies and 3.3 in small and medium-size companies.

In fact, despite this overall Internet availability, Slovenian companies rely mostly on email, and other services (intranet/extranet, portals, instant messaging) will be developed**.**

❖ **Public access**

Educational institutions:

Slovenia has recognised the importance of endowing younger generations with digital skills.

The provision of PCs in primary school education is on average 4.8 PCs per 100 pupils, less than one-half of the EU average. But progress has been made by connecting more PCs to the Internet in primary level schools.

Number of computers per 100 pupils in primary education

Source: eEurope+ Progress Report 2001
Source: eEurope+ Education Ministry Survey, June 2003. CY, MT and TR, National Survey

Number of Computers per 100 pupils in primary education connected to the Internet

Source: eEurope+ Progress Report 2001
Source: eEurope+ Education Ministry Survey, June 2003. MT and TR, National Survey

At the secondary education level, the provision of PCs is 5 PCs per 100 pupils, less than one-third of the EU average. But ICT is a compulsory subject in the national curricula.
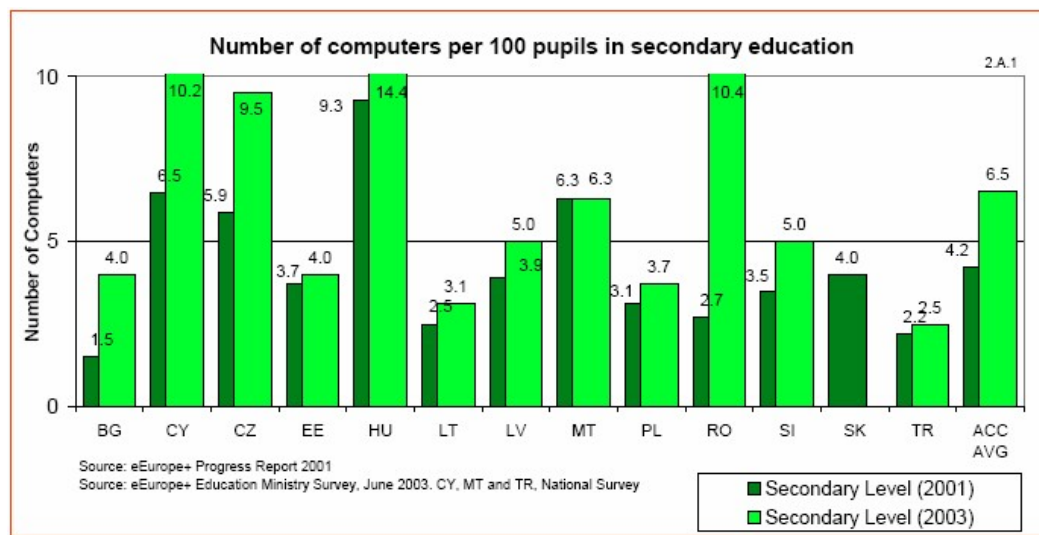
Public Internet Access Points:

PIAP is a centre with Internet access, regardless of whether the Internet providers are public and/or private, or whether access is free or not. Fully private Internet cafés are not included. According to the European Commission e-Europe+ report, published in February 2004, the number of PIAP per 1000 inhabitants in Slovenia has increased, over the last few years, from 0.06 in 2001 to 0.13 in 2003.

The Slovenian Ministry of Information Society supported a number of projects in co-operation with other government agencies during 2001-2003. Slovenia currently boasts many public Internet points (cyber café, e-schools, public libraries, multimedia centres, WLANs, etc.) and an annual increase of at least 20% in new PIAPs per year is planned over the next few years. Public Internet Access Points, commonly named "e-točke" or "e-points", are regularly monitored. An up to date list is available at the up-to-date "e-točke" website: http://e-tocke.gov.si/.

316	*Number of public Internet points*
110	*e-libraries*
22	*e-schools*
6	*multimedia centres*
44	*WLANs*
134	*Others*

Portal e-tocke.gov.si, 2004

1- e-Commerce is expanding

Slovenia has embraced eCommerce with various internal and external co-operation projects to assist in its development. Academics, the government, and private industry are working together. Still, the content industry as such is not well established in terms of matching content providers, technology providers and end customers in order to set up commercial services. Internet is mainly used for information retrieval, less for services and collaboration.

a) B2C

Despite a high percentage rate of IT equipment in Slovenian households (**58% in 2002**) and a significant number of regular users of Internet (**38% in 2002**), the rate of e-commerce in Slovenia is weak, but it is expanding.
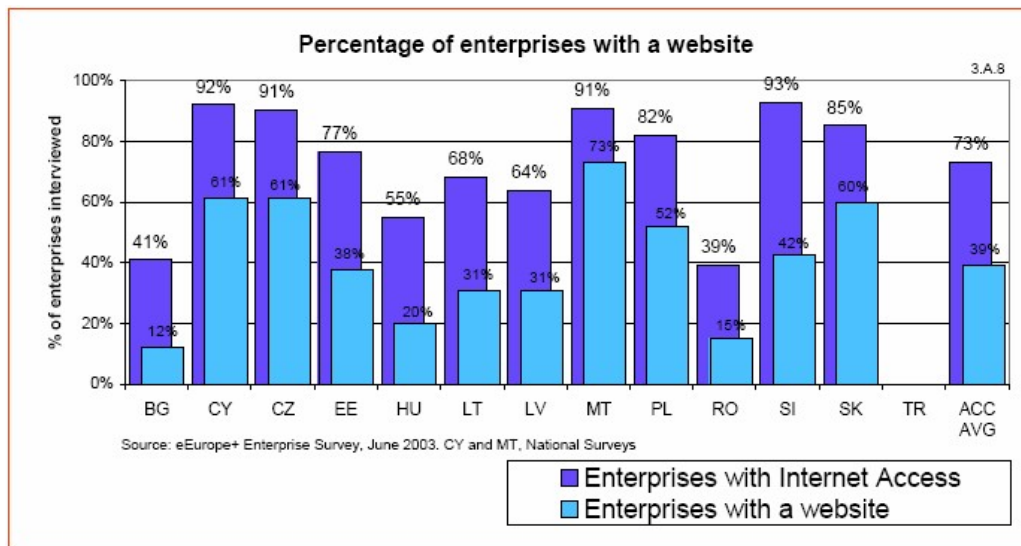For the year 2002, sales made via Internet represented €16.8 million, which represented an increase of 90% compared to the previous year.

❖ The Offer :

Slovenia has made a considerable effort to develop e-business:
- Implementation of business-to-business and business-to-customer payments over Internet, connecting banks to companies and citizens.
- Electronic Commerce and Electronic Signature Act implemented: a government agency has been set up to check Internet site security (certificates SIGEN-CA et SIGOV-CA),
- XML-based eSigned and eInvoice developed by the organizations in eSLOG Project, sponsored by the Chamber of Commerce and Industry of Slovenia.

There are few Slovenian companies with their own Internet sites (42%) compared to the number of companies connected to Internet (93%). The quality of Slovenian sites is, however, high.
The economic weekly, *Gospodarski Vestnik,* gives the "*Netko*" award each year to the most user-friendly Internet site. In 2002, it was awarded to the Internet site, *Merkur*, a household appliances, tools, hi-fis, and videos chain of stores, and in 2003 to *Nova Ljubljanska banka Group,* the largest banking and financial services organization in Slovenia.

Percentage of enterprises with a website

Source: eEurope+ Enterprise Survey, June 2003. CY and MT, National Surveys

■ Enterprises with Internet Access
■ Enterprises with a website

❖ **The Demand:**

Compared to all the surveyed countries, Slovenia is positioned in the middle with respect to e-commerce users (i.e., persons who have ordered a product or a service).
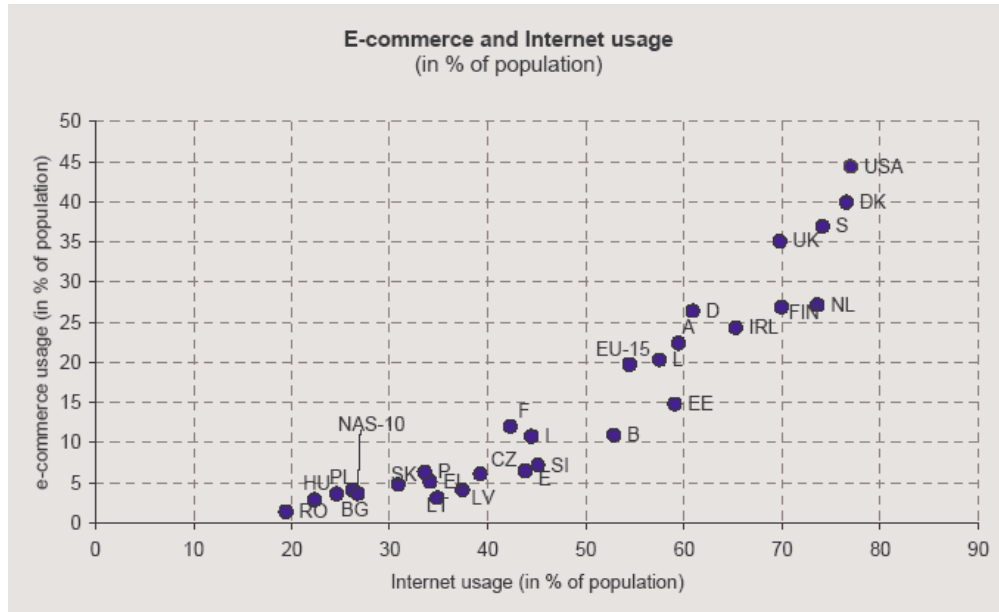
Project RIS, University of Ljubljana 2003

But it appears that, although many users access the Internet in search of goods and services, only a quarter of those actually proceed with an online purchase.
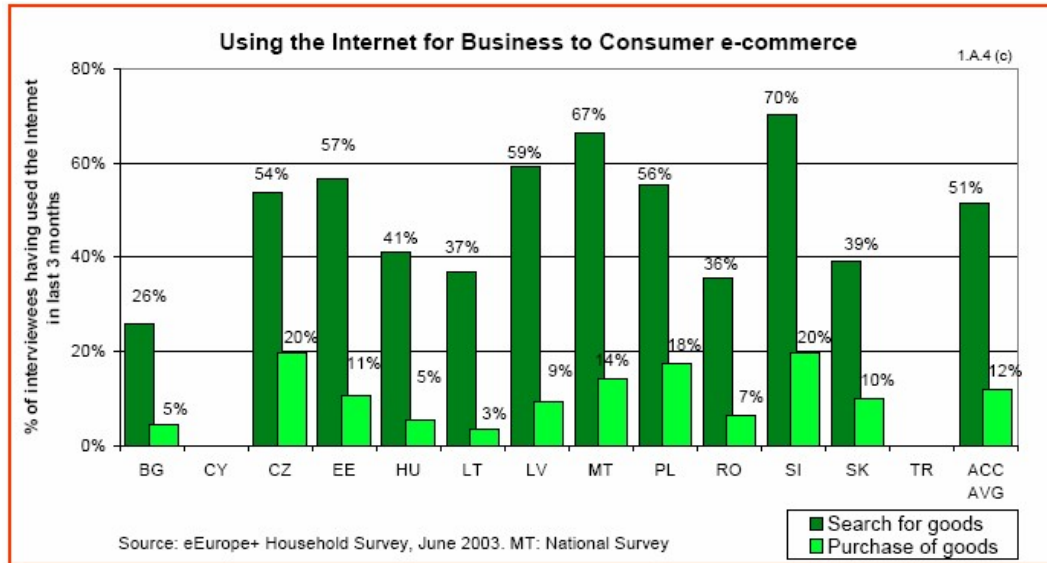
Slovenian company sites have registered an increase in their sales but continue to be used principally when searching for information, particularly to compare prices.
Slovenians still prefer to make their final purchases in shops where they can examine the real products.

❖ **Main Slovenian Commercial Sites**

There are number of commercial Internet sites, most of them registered on the national directory portals such as Matkurja, Najdisi and Slowwwenia. Some of the most known are the following:

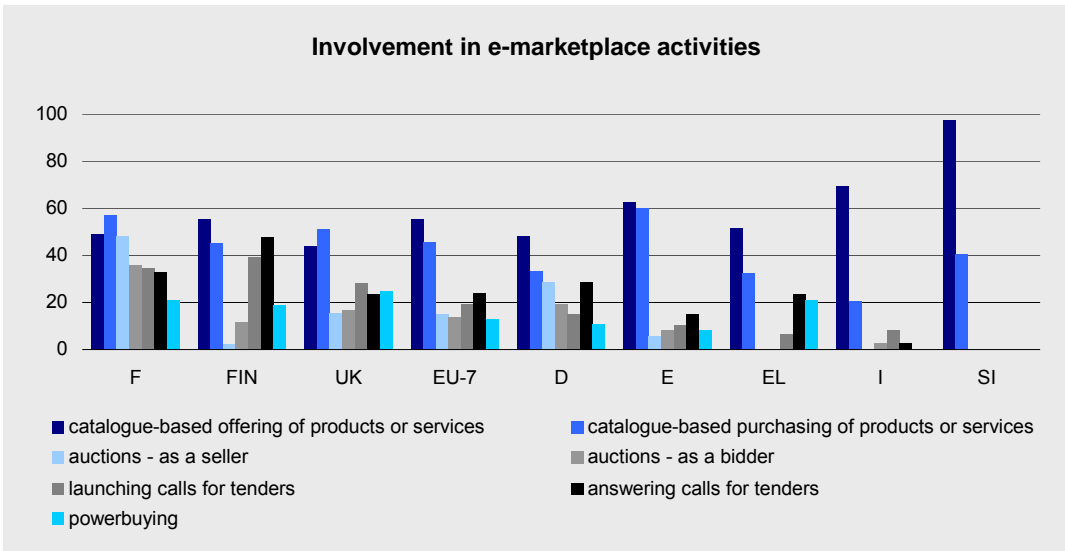| Newspapers	Search Engines/Directories	IT
www.delo.si	www.matkurja.com	www.microsoft.com/slovenija
www.dnevnik.si	www.slowwwenia.com	www.pcx.si
www.vecer.si	www.najdi.si	
www.si-int-news.com		
www.finance-on.net		
Automobiles	**CDs**	**Books**
www.avto.net	www.bigbang.si	www.dzs.si
www.avtoborza.com	www.svetglasbe.si	www.mkz-lj.si
www.amzs.si	www.dom.si	www.emka.si
Auction Sales	**Specialised Shops**	**Department Stores**
www.bohla.com	www.neckermann.si	www.merkator.si
www.vecer.com	www.merkur.si	www.ponudba.com
	www.shopolina.com	www.btc-city.com
Media		
www.rtvslo.si		
www.24ur.com		
www.radiostudent.si		
radio.ognjisce.si		
www.radiodur.si		
www.radiohit.si		

The main foreign sites are yahoo.com, altavista.com, Microsoft and Google. They benefit from a very strong interest on the part of Slovenians for foreign products, and from Slovenian knowledge of the English language.

b) B2B

Internet penetration among Slovenian firms is very high (93%).
42% of enterprises have a web site and 8% have purchased online in 2002.

Percentage of enterprises having purchased online in 2002

Source: eEurope+ Enterprise Survey, June 2003. MT, National Survey
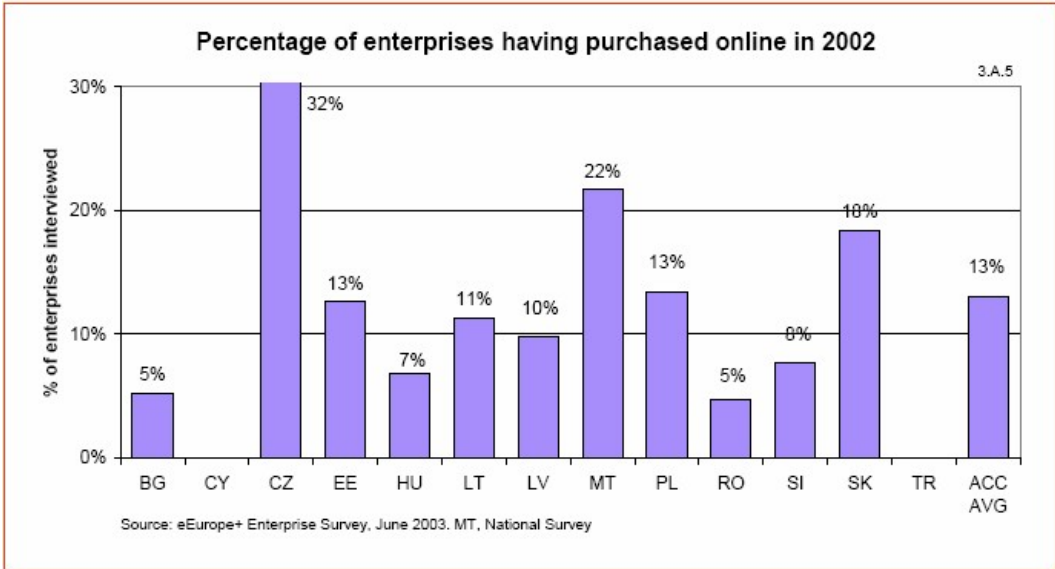
All Slovenian enterprises who participate in trade on e-market places deal with the catalogue-based offering/purchasing of products or services.

Involvement in e-marketplace activities

- catalogue-based offering of products or services
- catalogue-based purchasing of products or services
- auctions - as a seller
- auctions - as a bidder
- launching calls for tenders
- answering calls for tenders
- powerbuying

Project RIS, University of Ljubljana - 2003

b) E-banking

E-banking is a developing market in Slovenia.
20% of regular Internet users claim that they use e-banking services in Slovenia:

Using the Internet for eBanking and other financial services

Source: eEurope+ Household Survey, June 2003. MT: National Survey
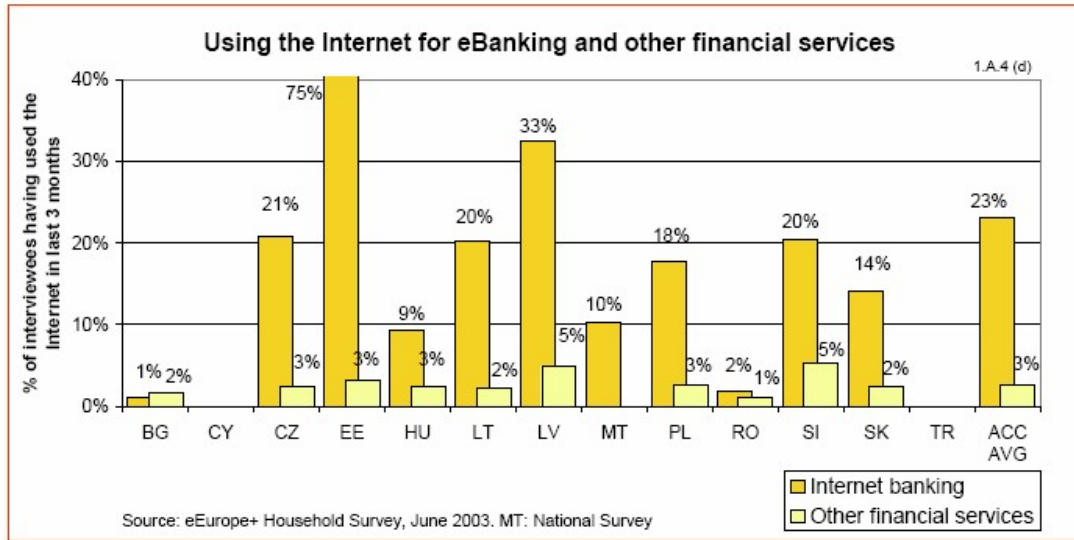
E-banking is highly developed in Slovenian companies (89%) :

Percentage of enterprises with Internet access using the internet for banking and financial services

Source: eEurope+ Enterprise Survey, June 2003. MT, National Survey

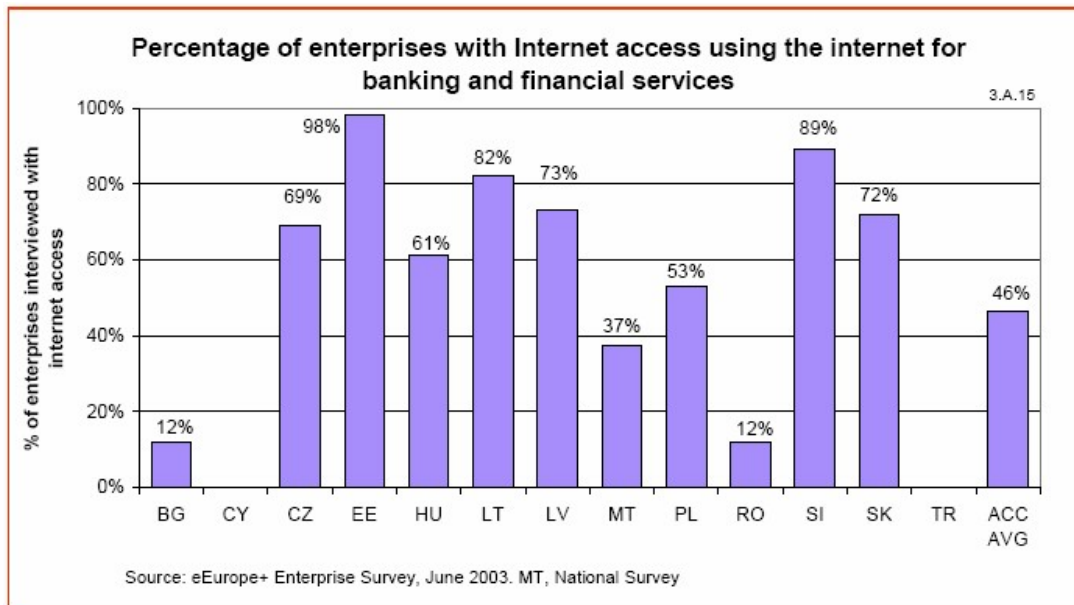According to the project RIS, the satisfaction with e-banking services is very high. On the scale 1-5 the general satisfaction is thus significantly higher than 4. Another trend is that – as the users are becoming satisfied consumers of e-banking – the loyalty to their bank seems to increase. Thus, less than one fifth of users of e-banking would change banks if the competitors offered a better e-banking service.

The most important player in the Slovenian market is the *Nova Ljubljanska Banka* which provides both individuals and companies with an e-banking service called «Klik» . This service represents more than 50% of the e-banking market share.

Other significant players in the market include: *SKB Banka* which supplies an e-banking service called «Skbnet», *Nova KBM* with the «Bankanet» service, *Abanka* with the service «Abanet» and *Banka Koper* offers the «i-net» service.

2-   e-Government

Slovenia is the only European country with a sizeable Internet population where the interest of online communication with the government exceeds the classical options of communication. Generally, respondents from the northern countries of Europe show a greater preference for interacting with government using the Internet than the EU as a whole.

Preferred way of interacting with government services
(Average number out of 7 services)
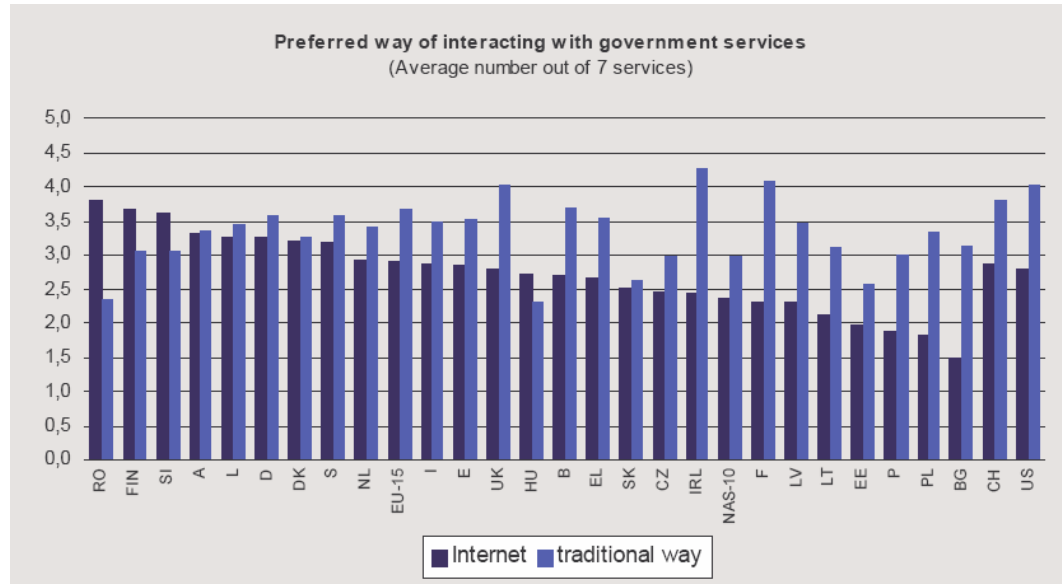
Project RIS, University of Ljubljana - 2003

In Slovenia, the Ministry of Information Society holds the political responsibility for e-government. The Ministry of Information Society actively participates and monitors all the main activities at the EU level and assures consistency of national initiatives and projects with the broader directions of the EU. However, at an operational level, the Government Centre for IT (GCI) is the body in charge of developing the country's e-government infrastructure and supporting, controlling and co-ordinating government departments' ICT projects.

E-government activities, as much as other activities within the information society framework in Slovenia, are described in some core strategic documents:
- Strategy Republic of Slovenia in information Society (2003)
- Strategy of Electronic Commerce in the Local Communities (2003)
- e-government action plan (2003)
- Strategy for E-Commerce in Public Administration for the Period 2001 – 2004 (2001)

The legal framework for the development of e-government in Slovenia comprises, to date:
- Personal Data Protection Act (1999),
- Act on Electronic Commerce and Electronic Signature (2000),
- Act on Access to Public Sector Information (2003).

A basic technological infrastructure is in place within all Slovenian public administrations, including networks, network connections, servers and necessary workplace equipment. Most government bodies have Internet/intranet facilities and a government-wide network, connecting all state departments.

A new e-government portal, launched in March 2004, provides access to a range of e-services and government information for citizens, businesses and civil servants.

❖ **Online services for citizens:**

23% of regulars use the Internet to communicate with the government and, in particular, to download official forms. However, only 11% of them returned the forms using the Internet. Effort is still required to ensure full use of the two-way transaction capabilities.
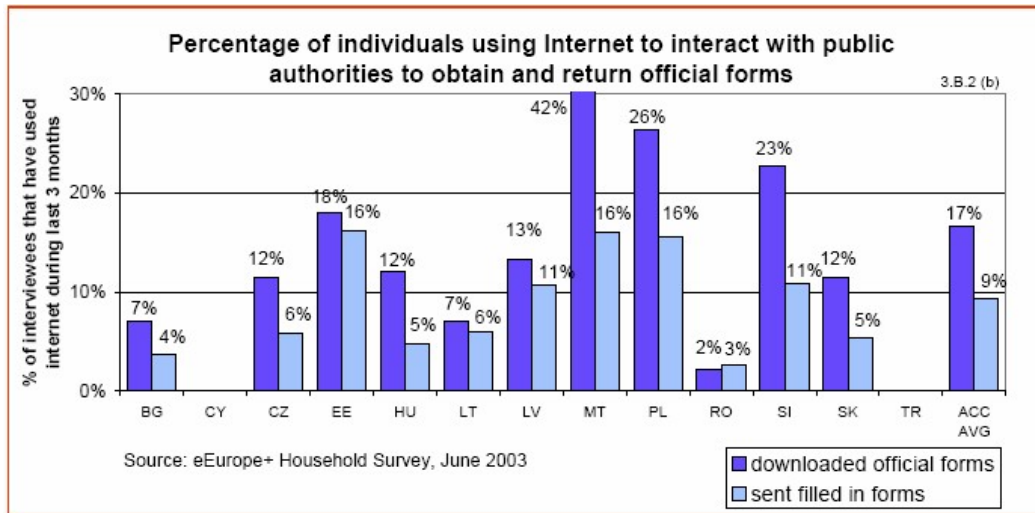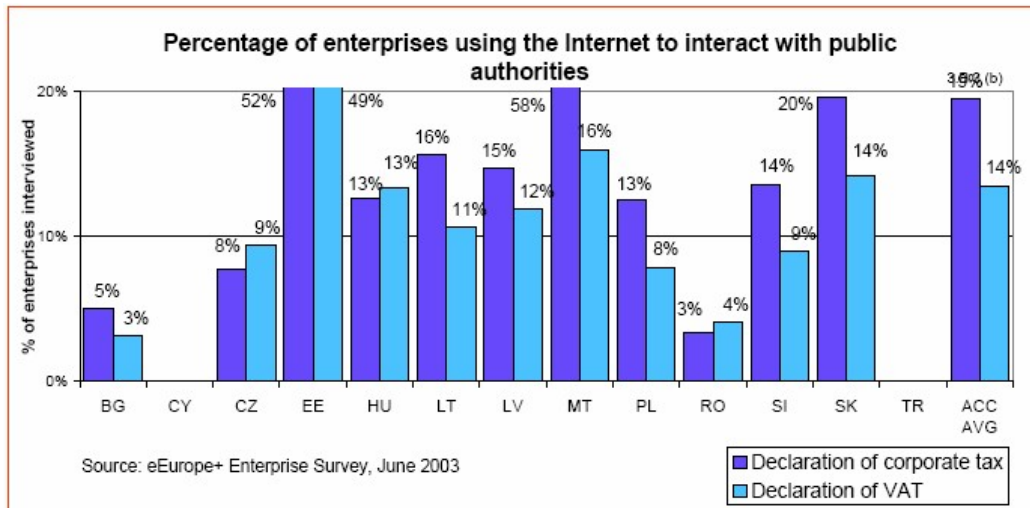

Moreover, although users are satisfied with the e-government web portal in general, 55.6% of them add that they would like to obtain more information and see more news topics and content on the portal.

With this respect, important advancements have been made in 2004, specially the establishment of a renewed e-government portal with a registry of all available e-services and the availability of a service for filling income tax returns for citizens. According to e-government action plan monitoring results (January, 2004) and according to the eEurope benchmarking methodology, the services still not at the EU level are in the area of personal documents, declarations to the police, applications for building/planning permission and announcements of moving. At the same time, services that already exceed the level in EU include job search services by labour offices, public libraries, certificates and enrolment in higher education/university.

❖ **Online services for businesses:**

G2B services are in general at the slightly lower level than G2C. More online services for businesses will be developed in Slovenia in the next few years. Similar to G2C development, several important developments have already been made in 2004. The most important is the availability of corporation tax service, VAT service and reporting to the statistical office that represent services at a higher level comparing to EU. However, there is still need for further development, especially services in the area of social contributions for employees, registration of new companies and customs declarations**.**

Percentage of enterprises using the Internet to interact with public authorities

Source: eEurope+ Enterprise Survey, June 2003

Legend: Declaration of corporate tax / Declaration of VAT

3-   e-Health

E-health gained an important priority in Slovenia already at the beginning of 90s. One of the most important projects was the establishment of electronic health card system for all the Slovenian population. The project was started by Health Insurance Institute together with partners who designed and implemented the whole system, which was at that time one of the first implementations in EU. The project was started in 1995, was put into pilot production in 1998 and finished as a deployed official service at a national level in 2000. Since deployment, it has been constantly monitored for security and effectiveness and upgraded in terms of different types of information stored on the card. Also, further upgrades of the system are planned that would enable addition functionality, many are also relevant and available for access through the public Internet using PKI infrastructure.

However, in terms of e-content, e-health in Slovenia is still underdeveloped. There is a lack of quantity and quality of services, both for consumers and business. Services including social security related services (e.g., medical cost, etc.) and health-related services (e.g., medical advice, hospital information, appointments, etc.) are the least developed among all other services available.

4-   e-Learning

Only 6.6% of the Slovenian labour force uses e-learning (EU-15 14%).

Usage of e-learning
(in % of labour force)
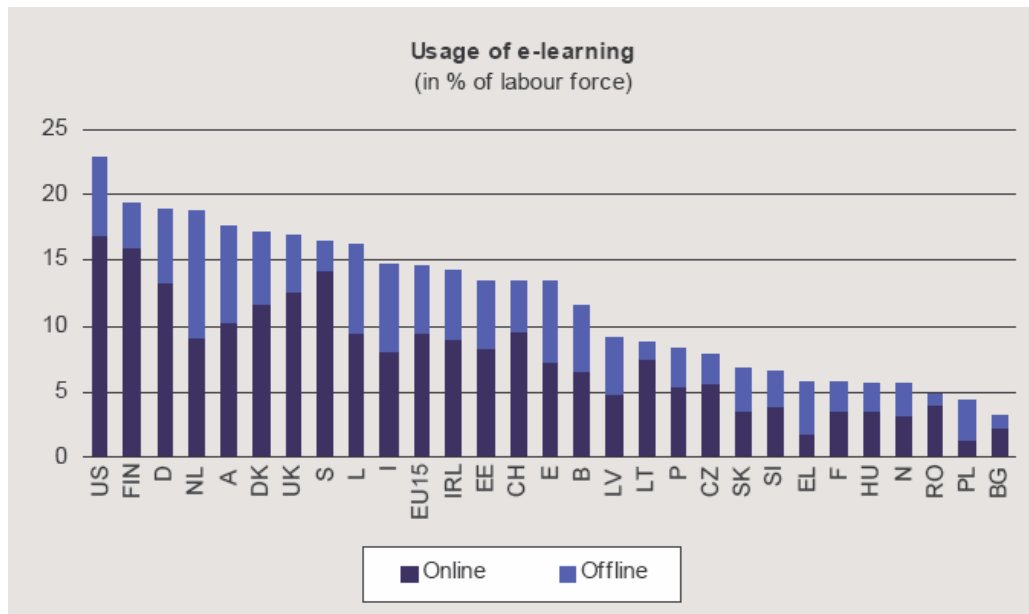
Project RIS, University of Ljubljana - 2003

❖ **Several major e-learning initiatives have been launched:**

- **'Distance Learning in Slovenia' project":** Funded by Ministry of Education, the aim of the project is to elaborate a national e-learning strategy in Slovenia. The strategy will consist of didactical, organizational, economic, technological and content e-learning aspects intended for elementary and secondary school, academic, corporate, governmental and lifelong learning environments.

- **E Cho:** e-learning platform developed by the telecommunications and electro-technical laboratory at the University of Ljubljana.

- **Slovenian Education Network:** this network was set up in 1995 to connect all servers with educational e-content in order to enable, promote and consolidate the use and creation of educational content in Slovenia. The network involves kindergartens, primary and secondary schools together with University of Ljubljana and Maribor and other relevant public institutions.

CONCLUSION

With the rapid development in the mid 90s, Slovenia was among the most developed countries and above the EU average, according to all key Internet indicators. With respect to the general Internet and related IST developments, Slovenia is still relatively advanced among EU countries.

Slovenia has a really good telecommunications infrastructure, somewhat comparable to that of Western Europe. One of the major challenges Slovenia faces in its transformation to an information-based economy is implementing the telecommunications act in order to allow for real competition in the Slovenian telecommunications market.

Another challenge is to develop e-content and e-services. Some data indicate that the gap between the potential/interest in Internet services and the actual supply/use is the largest in Slovenia among all the EU 25.

SOURCES

1. **Government sites**

   - **Slovenian Institutions webportal**
     http://www.gov.si

   - **Ministry of Information Society**
     http://mid.gov.si

     > **Mr Samo ZORC**
     > Councillor to the Government
     > eContent NCP
     > Trzaska cesta 21, 1508 Ljubljana
     > Tel: 01 478 83 64
     > Fax: 01 478 8375
     > E-mail: samo.zorc@gov.si

   - **Government Centre of Information Technology**
     http://www.gov.si/cvi/eng/index_eng.htm

   - **E-government web portal**
     http://e-uprava.gov.si/e-uprava/

2. **Specialised administrations**

   - **ATRP**
     http://www.atrp.si

   - **Association of Informatics and Telecommunications – G.Z.S. Chamber of commerce and industry of Slovenia**
     http://www.gzs.si/eng/Article.asp?IDpm=503

   - **Civil Society**
     http://www.drustvo-informatika.si

   - **Slovenia your R&D and business partner**
     http://www.rdbp.rtd.si/

3. **Survey Agencies**

   - **Statistical Office of the Republic of Slovenia**
     http://www.stat.si/eng/index.asp

   - **RIS (Research on Internet of Slovenia)**
     http://www.ris.org

4. **European and International sites**

   - **European Commission Directorate General for Information Society**
     http://europa.eu.int/information_society/index_en.htm

   - **European Commission Directorate General for Enlargement**

http://europa.eu.int.comm/enlargment

- **Eurostat**
  http://europa.eu.int/comm/eurostat

- **OECD (Organisation for Economic Cooperation and Development)**
  http://oecd.org

- **United Nations**
  http://un.org

5. Telecommunications

- **Telekom Slovenije**
  @: info@telekom.si
  W: http://www.telekom.si

- **Inco-Tel**
  @: info@inco-tel.com
  W: http://www.inco-tel.com

- **In.Life**
  @: info@inlife.si
  W: http://www.inlife.si

- **Teracom**
  @: office.si@teracom.si
  W: http://www.teracom.com

- **Debitel**
  @: predlogi@debitel.si <
  W: http://www.debitel.si

- **Vega Western Wireless International**
  @: info@vega070.com
  W: http://www.vega070.com

- **Si.Mobil**
  @: info@simobil.si
  W: http://www.simobel.si

- **Mobitel**
  @: info@mobitel.si
  W: http://www.mobitel.si

- **SIOL**
  @: info@siol.net
  W: http://www.siol.net