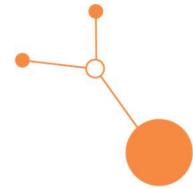


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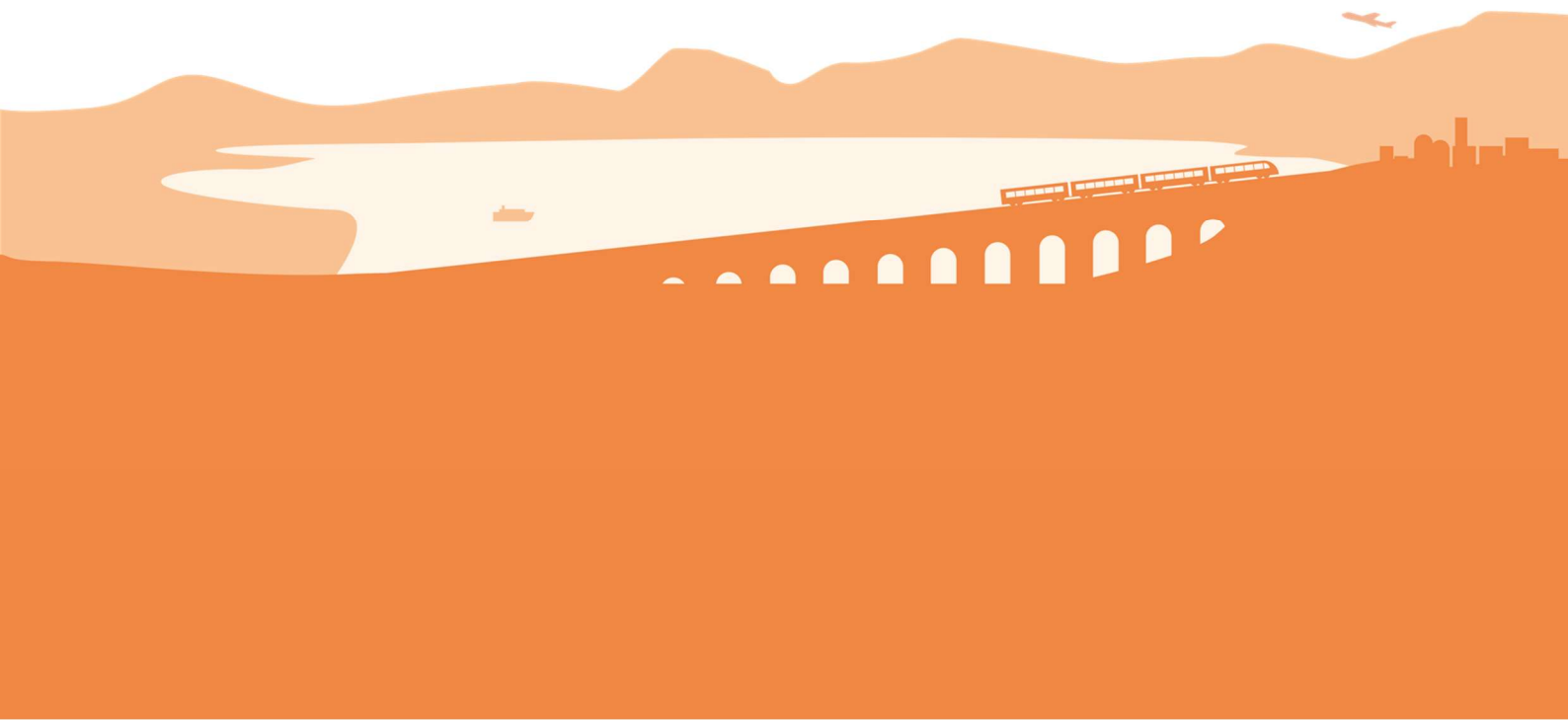
Rail4Regions

ACTION PLAN

Slovenia



Final version
January 2026





A. General information

Partner Organization

- **Name of Partner Organization:** Prometni institut Ljubljana / Institute of Traffic and Transport (Slovenia)
- **Region Covered:** Slovenia

B. Regional context

Policy Application Processes

Slovenia does not have autonomous regional governments with their own transport or spatial planning competences. The country is administratively centralised and only divided into 12 statistical regions, which have no decision-making powers in transport or infrastructure development.

Therefore, this Action Plan covers the entire territory of Slovenia and focuses on the national-level framework and actors involved in the development of railway infrastructure.

Slovenia has a highly strategic transport position at the crossroads of Central and South-East Europe. Its territory is crossed by three core TEN-T transport corridors:

- Baltic-Adriatic Corridor,
- Mediterranean Corridor, and
- Western Balkans-Eastern Mediterranean Corridor.

Together, these corridors form the backbone of European rail freight transport and provide Slovenia with a crucial role as a transit country and logistics hub, especially in connection with Luka Koper, which serves as the main maritime gateway to Central Europe.

Despite this advantageous position, the Slovenian rail freight sector faces several challenges:

- limited capacity on main railway lines, which constrains the growth of freight volumes,
- many industrial sidings are abandoned, physically degraded or formally inactive,
- single wagon load (SWL) services are limited and uncompetitive compared to road transport,
- lack of integrated logistics centres and insufficient multimodal connections between rail, road and port infrastructure.

An additional challenge is the strong spatial concentration of rail freight traffic on the main network, while freight traffic on regional railway lines is very low or entirely absent. As a result, many industrial and economic zones located along regional lines have no access to competitive rail services. Most goods are therefore transported by road to mainline rail hubs, which increases road congestion and reduces the overall efficiency and sustainability of the logistics chain.



National strategic documents, such as the Resolucija o nacionalnem programu razvoja železniškega prometa (Resolution on the National Railway Development Programme) and the Strategija razvoja prometa v Republiki Sloveniji (Transport Development Strategy of the Republic of Slovenia), recognise the need to increase the rail share of freight transport. However, their successful implementation requires more operational regional and sectoral action plans. These must be aligned with EU policies such as the EU Green Deal, the Sustainable and Smart Mobility Strategy (SSMS), and the revised TEN-T Regulation, all of which encourage a modal shift from road to rail.

The Rail4Regions project provides an opportunity for the Prometni institut Ljubljana to work with national and regional stakeholders to develop a targeted action plan aimed at increasing the use of existing rail infrastructure, reactivating industrial sidings and secondary lines, and developing digital tools to support planning and decision-making in rail freight transport.

Transport and spatial planning actors

In Slovenia, transport and spatial planning competences are distributed across several levels of governance and types of organisations. The main actors relevant for the development of railway infrastructure are the following:

National authorities

- Ministrstvo za infrastrukturo Republike Slovenije (Ministry of Infrastructure) - responsible for national transport policy, strategic planning, regulation and funding of rail infrastructure and services.
- Ministrstvo za naravne vire in prostor Republike Slovenije (Ministry of Natural Resources and Spatial Planning) - responsible for national spatial planning policy and legislation.
- Direkcija Republike Slovenije za infrastrukturo (DRSI) - implements investment, maintenance and development of public transport infrastructure.

Rail infrastructure and transport operators

- Slovenske železnice (SŽ) - national railway operator and holding company, including infrastructure manager (SŽ-Infrastruktura) and freight operations (SŽ-Tovorni promet).

Regional and local level

- Regional development agencies - prepare regional development programmes, manage EU funds and coordinate local infrastructure initiatives.
- Municipalities - hold spatial planning competences and can allocate land and set conditions for industrial sidings and logistics zones.

Industry and logistics sector

- Luka Koper - the main maritime port and intermodal hub for Central Europe, generating a large share of rail freight flows.
- Gospodarska zbornica Slovenije (Chamber of Commerce and Industry of Slovenia) - represents the logistics, rail and industrial sectors and promotes rail freight solutions.
- Private logistics operators, terminal operators and industrial companies owning or using private sidings.



C. Adopted solutions

Based on the national context and the identified challenges, Prometni institut Ljubljana has decided to focus on two priority thematic areas from the Rail4Regions framework – industrial sidings and single wagonload (SWL) services.

These solutions directly address the lack of rail freight activity on regional lines and the insufficient last-mile connectivity of Slovenian industries, which are currently among the main barriers for shifting freight from road to rail.

1. Industrial sidings

- Establishment of a national register of industrial sidings, including data on location, ownership, technical condition, connectivity and current usage.
- Identification of priority sidings for reactivation or modernisation based on demand potential, technical feasibility and cost-benefit criteria.
- Preparation of a funding and incentive scheme for the rehabilitation and reactivation of industrial sidings, combining EU and national sources and encouraging public-private partnerships.
- Integration of the register and prioritisation tool into national transport and spatial planning processes in cooperation with Slovenske železnice, Ministrstvo za infrastrukturo Republike Slovenije and regional development agencies.

2. Single wagonload (SWL) services

- Comprehensive assessment of the current SWL system in Slovenia, including infrastructure, operational models, cost structures and demand potential.
- Design of a pilot SWL incentive scheme targeting operators and terminals to support the re-establishment of regular and competitive SWL services.
- Development of operational concepts for combined use of industrial sidings and SWL services, enabling local industries to access the rail network without full trainloads.
- Coordination with neighbouring countries to facilitate cross-border SWL flows, ensuring the long-term viability of the system.



D. Stakeholder Engagement

As Slovenia has a centralised governance structure without autonomous regional governments, stakeholder engagement is a crucial element for the implementation of this Action Plan. The involvement process is coordinated by the Prometni institut Ljubljana and includes actors from the national, regional, local, industry and research levels.

The following main stakeholder groups have been identified:

- National authorities: Ministrstvo za infrastrukturo Republike Slovenije, Direkcija Republike Slovenije za infrastrukturo, Ministrstvo za naravne vire in prostor Republike Slovenije
- Infrastructure and railway operators: Slovenske železnice (especially SŽ-Infrastruktura and SŽ-Tovorni promet)
- Industry and logistics sector: Luka Koper, logistics operators, terminal operators, industrial companies owning or using private sidings
- Regional and local level: regional development agencies, municipalities
- Business and research support organisations: Gospodarska zbornica Slovenije, chambers of commerce, research institutions

The stakeholder engagement process in Slovenia has been coordinated by the Prometni institut Ljubljana. It started with bilateral consultations with key national institutions, including the Ministrstvo za infrastrukturo Republike Slovenije and Slovenske železnice, in order to discuss data availability, investment priorities and the regulatory framework for the development of rail freight infrastructure. These initial meetings helped identify the most critical challenges and align expectations between the public sector and infrastructure managers.

Following this, a national stakeholder workshop was organised to present the objectives of the Rail4Regions project and to collect feedback on current barriers, opportunities and needs related to industrial sidings and single wagonload services. The workshop also served to build trust among stakeholders and to establish a common understanding of the potential role of regional railway lines in supporting rail freight. In the subsequent phase, continuous communication has been maintained through a dedicated mailing group and regular online coordination meetings, ensuring that all relevant stakeholders are kept informed and involved in the development of the Action Plan.



E. Proposed actions

Based on the identified needs and the selected adopted solutions, Prometni institut Ljubljana proposes a set of concrete actions to be implemented at national level in Slovenia. These actions aim to create the enabling conditions for the reactivation of industrial sidings, the revitalisation of freight use on regional lines, and the re-establishment of competitive single wagonload (SWL) services as a backbone of the national rail freight system. The actions are complementary and mutually reinforcing, combining data and planning tools, investment preparation, regulatory and financial frameworks, and pilot operational measures.

Action #1: Establishment of national register of industrial sidings

The first essential step is to gain a comprehensive and reliable overview of the existing industrial sidings in Slovenia, which are currently poorly documented, fragmented across different databases and often formally inactive. This action will establish a national register of industrial sidings, which will include data on location, ownership, technical characteristics (track length, axle load, electrification, signalling), connection points to the main network, operational status and current usage.

Lead / partners: Prometni institut Ljubljana (lead), Slovenske železnice, Direkcija Republike Slovenije za infrastrukturo, Ministrstvo za infrastrukturo Republike Slovenije, regional development agencies.

Timeline: Short term (0-12 months).

Financing Resources: This action does not require significant financial resources. It will be implemented mainly through internal staff resources of the involved institutions (Prometni institut Ljubljana, Slovenske železnice, DRSI, Ministry of Infrastructure).

Risks: The main risk is limited availability or quality of data, as information on industrial sidings is currently fragmented among different stakeholders. In addition, insufficient cooperation from private siding owners may reduce the completeness of the register.

Action 2 - Prioritisation of industrial sidings for reactivation or modernisation

Building on the national register, this action will develop a decision-support methodology for prioritising industrial sidings for reactivation or modernisation. The methodology will combine technical, operational, ownership and cost-benefit criteria and will be applied to the full national portfolio of sidings.

The output will be a ranking and selection of 10-15 priority sidings with the highest potential to generate new rail freight flows. For each priority site, a pre-feasibility study will be prepared, including traffic potential, estimated investment costs, stakeholder interest and spatial planning conditions. This will provide a pipeline of ready-to-implement projects for EU and national funding opportunities.

Lead / partners: Prometni institut Ljubljana (lead), Slovenske železnice, 2TDK, Ministry of Infrastructure, selected municipalities and industrial companies.



Timeline: Short to mid term (6-18 months).

Financing: Financing will be provided through national resources, primarily covering analytical work and pre-feasibility studies. Additional contributions may come from interested municipalities or industrial stakeholders for site-specific assessments.

Risks: Potential risks include diverging interests among national, regional and private stakeholders, which may complicate the prioritisation process. There is also a risk that some highly ranked sidings may prove unfeasible due to spatial planning, ownership or technical constraints.

Action 3 - Preparation of a financial support scheme for industrial sidings

One of the key barriers to the revitalisation of industrial sidings in Slovenia is the absence of a clear financial mechanism to support their rehabilitation. This action will design a national co-funding scheme for investments in industrial sidings, combining national resources and EU funds such as the Connecting Europe Facility (CEF), the Kohezijski sklad (CF) and the Evropski sklad za regionalni razvoj (ERDF).

The scheme will define eligibility criteria, co-financing rates, project selection and evaluation procedures, as well as options for public-private partnerships. It will be developed in close cooperation with the Ministry of Infrastructure, the Ministry of Finance and the Gospodarska zbornica Slovenije to ensure acceptance by both public and private stakeholders.

Lead / partners: Ministry of Infrastructure (lead), Prometni institut Ljubljana, Gospodarska zbornica Slovenije, Ministry of Finance.

Timeline: Mid term (12-24 months).

Financing: The preparation of the support scheme will be financed mainly from national public resources, with possible use of EU technical assistance. The scheme itself is expected to combine national funding and EU financial instruments (CEF, CF, ERDF), encouraging public-private partnerships.

Risks: Key risks include limited availability of national funding or insufficient political support for establishing a new support scheme. In addition, state aid rules and administrative complexity may delay the design and implementation of the scheme.

Action 4 - Assessment of the current SWL system and market potential

SWL transport has almost disappeared in Slovenia, despite being a crucial system for enabling small and medium-sized shippers to access the railway network. To support its revival, a comprehensive assessment will be conducted of the existing SWL infrastructure, operational models, cost structures, service supply and market demand.

The analysis will also benchmark the Slovenian situation with best practices from neighbouring countries (e.g. Austria), where SWL services have been successfully maintained. The results will identify priority corridors and terminals for the reintroduction of SWL services and will provide the evidence base for designing an incentive scheme.



Lead / partners: Prometni institut Ljubljana (lead), SŽ-Tovorni promet, Ministry of Infrastructure, universities and research institutions.

Timeline: Short term (0-12 months).

Financing

This action will be financed through internal resources of the participating organisations (Prometni institut Ljubljana, SŽ-Tovorni promet, research institutions). No major investment funding is required, as the action focuses on analytical work.

Risks

Risks include limited access to commercial and operational data, particularly where information is commercially sensitive. There is also a risk that the identified market potential for SWL services may be lower than expected, weakening the case for further interventions.

Action 5 - Design and launch of a pilot SWL incentive scheme

Based on the results of the SWL assessment, this action will design and implement a pilot financial incentive scheme to support the re-establishment of regular SWL services in Slovenia. The scheme will define eligible services, subsidy levels, duration, monitoring and evaluation methods, and will be implemented in cooperation with selected operators and terminals.

The objective is to stimulate initial demand, lower operational risks for operators, and enable gradual market recovery of SWL services, including possible cross-border connections with neighbouring countries. Successful pilots could then be scaled up with EU funding support.

Lead / partners: Ministry of Infrastructure (lead), Prometni institut Ljubljana, SŽ-Tovorni promet, selected terminals and logistics operators.

Timeline: Mid term (12-24 months).

Financing: The pilot scheme will require dedicated public funding, primarily from national sources, with possible co-financing from EU funds. Financial support will be time-limited and focused on market entry, with the aim of achieving long-term commercial viability.

Risks: The main risk is insufficient interest from operators or shippers to participate in the pilot scheme. There is also a risk that financial incentives may not be sufficient to reach critical mass, or that services will not be sustained after the end of public support.



F. Monitoring and Evaluation

Monitoring Mechanism

The implementation of this Action Plan in Slovenia will be monitored through a structured and transparent mechanism coordinated by the Prometni institut Ljubljana. The monitoring framework will ensure the continuous collection of data on the progress of each proposed action, the regular involvement of key stakeholders, and the timely identification of implementation challenges.

A national steering group will be established as the main governance body for monitoring, composed of representatives of the Ministrstvo za infrastrukturo Republike Slovenije, Direkcija Republike Slovenije za infrastrukturo, Slovenske železnice, regional development agencies and business associations such as the Gospodarska zbornica Slovenije.

The steering group will meet every six months to review progress reports prepared by the Prometni institut Ljubljana, validate data, assess deviations from the implementation plan and propose corrective actions if needed. After each meeting, a short monitoring report will be produced, summarising the status of each action, main risks and planned next steps. These reports will be shared with all stakeholders and with the project consortium of Rail4Regions.

In addition, an online monitoring dashboard will be developed (using a simple spreadsheet-based platform) to track the progress of indicators, funding status, and milestones in real time. This will increase transparency and facilitate the coordination of parallel activities by different institutions.

Performance Indicators (KPIs)

To evaluate the success and impact of the Action Plan, a set of quantitative and qualitative performance indicators will be used. These indicators are directly linked to the objectives and proposed actions described in this document and will be collected annually by the Prometni institut Ljubljana in cooperation with other stakeholders.

Industrial sidings

- Number of industrial sidings included in the national register
- Share of sidings with updated technical and operational data
- Number of sidings prioritised for reactivation
- Number of reactivated or modernised sidings
- Volume of freight handled via industrial sidings (t/year)

SWL (single wagonload) services

- Number of operational SWL services in Slovenia
- Annual SWL freight volume (t)
- Number of terminals offering SWL services
- Number of companies using SWL services
- Estimated modal shift from road to rail (t/year, %)



These indicators will provide the basis for annual monitoring reports and for a final evaluation of the Action Plan in 2028. The evaluation will focus not only on outputs (e.g. number of sidings reactivated) but also on outcomes and impacts, especially the contribution to the modal shift from road to rail and the overall resilience and sustainability of the Slovenian rail freight system.

G. Conclusion and Next Steps

The preparation of this Action Plan has provided a comprehensive analysis of the current state and development needs of rail freight transport in Slovenia. It has highlighted the key structural barriers to a higher use of rail, notably the lack of active industrial sidings, the concentration of freight flows on the main network, the underutilisation of regional railway lines, and the almost complete absence of competitive single wagonload (SWL) services.

Through the work coordinated by the Prometni institut Ljubljana, the Action Plan proposes a focused set of measures to address these challenges. The selected solutions – revitalising industrial sidings and re-establishing SWL services – are designed to create the necessary enabling conditions for shifting freight from road to rail and for unlocking the potential of regional railway lines. They are fully aligned with national transport and spatial planning strategies as well as with the EU's TEN-T Regulation, EU Green Deal and Sustainable and Smart Mobility Strategy.

The next steps will focus on the practical implementation of the proposed actions. In the short term, priority will be given to establishing the national register of industrial sidings and completing the SWL market assessment, which will provide the analytical foundation for further investments. In parallel, a national steering group will be formally established to coordinate implementation, ensure stakeholder commitment and secure funding.

In the medium term, the aim is to activate the first pilot investments – rehabilitation of selected industrial sidings and the launch of at least two subsidised SWL services – and to gradually integrate the results into national transport planning and funding frameworks. By 2028, the objective is to achieve a measurable increase in the use of rail for freight transport on regional lines and to establish a sustainable system for the long-term development of industrial sidings and SWL services in Slovenia.

This Action Plan therefore represents the starting point for a structural shift in the Slovenian rail freight system, building the foundations for a more competitive, sustainable and resilient logistics network that contributes to the objectives of the Rail4Regions partnership and the wider European transport policy framework.