

Integrated Freight Services and TEN-T Corridors

Connecting transport networks for efficient freight movement

Overview of Integrated Freight Services

Multimodal Transport Integration

Combining rail, road, and maritime transport creates efficient and seamless logistics chains across Europe.

Slovenia's Strategic Role

Slovenia aims to become a smart, sustainable, intermodal, and globally competitive logistics hub. Positioned at the crossroads of European transport corridors, the country will leverage its geostrategic location to drive innovation, resilience, and green transition.

TEN-T Corridors Importance

Slovenia lies at the intersection of key European corridors, historically serving as a vital link between North-South and East-West trade flows. Despite recent setbacks in TEN-T corridor inclusion, Slovenia must reclaim its role by creating a favorable environment for logistics, which contributes 8% to national GDP.

Financial Support Instruments

Collaboration between government, industry associations, and universities is essential. Public investments and EU funds (e.g., Cohesion Fund, CEF) will support infrastructure and innovation.



Strategic Importance of TEN-T Corridors

CORRIDOR	KEY ROUTE	PURPOSE
Baltic-Adriatic	Gdansk – Vienna – Ljubljana – Koper	Connects northern Europe to Adriatic ports
Mediterranean	Spain – France – Italy – Slovenia – Hungary	Facilitates east-west trade and multimodal integration

Growth Trends and Market Share

Robust Market Growth

Combined Transport expanded by 59% from 2010 to 2023, outperforming conventional rail freight.

Dominant Market Share

By 2023, Combined Transport accounted for about 50% of Europe's total rail freight market.

Resilience Amid Challenges

CT grew 8.7% between 2018-2023 despite pandemic and energy crisis, while overall rail freight declined.

Continental CT Expansion

Continental CT focusing on swap bodies and semi-trailers grew 88% since 2013, leading freight innovations.



Forecast and Growth Drivers

Market Growth Outlook

Combined Transport in Europe is forecasted to grow about 3% annually until 2040, nearly doubling continental CT volume.

TEN-T Corridor Expansion

Expansion of TEN-T corridors will standardize infrastructure like train length and electrification, enabling efficient cross-border operations.

Digitalization and eFTI Regulation

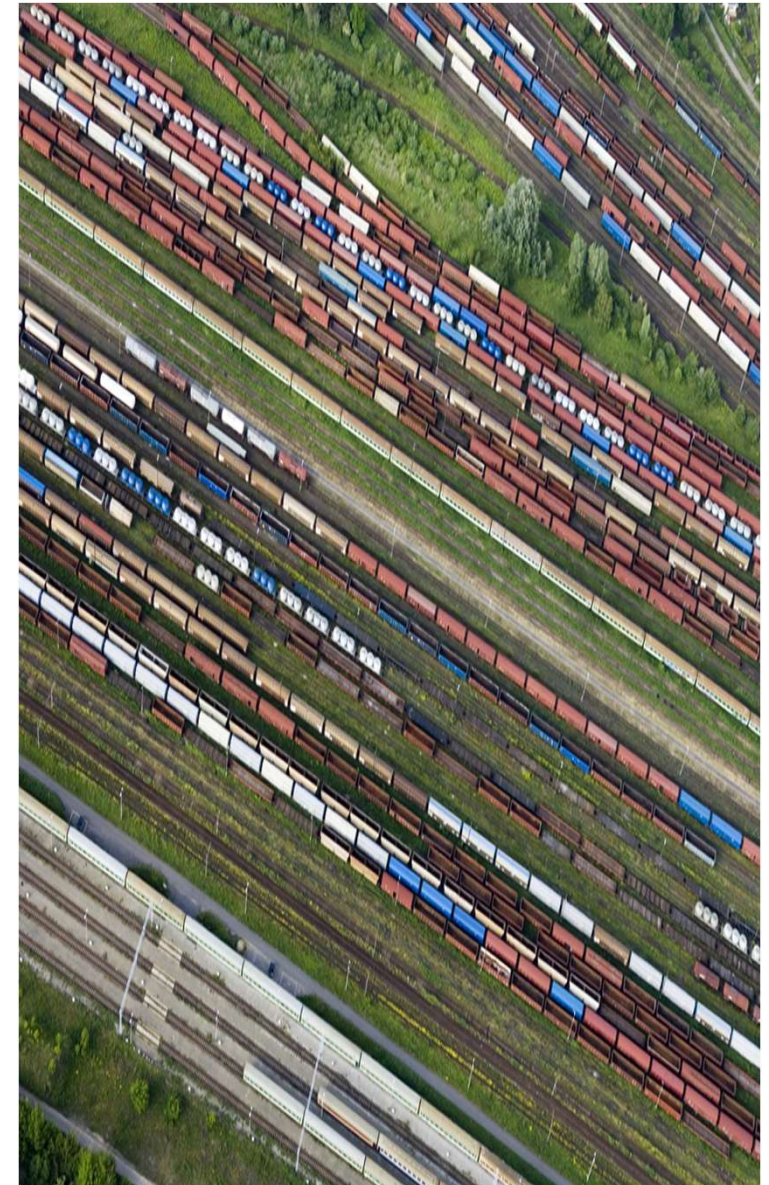
Digital initiatives such as the eFTI Regulation improve data exchange and transparency in freight transport operations.

Stakeholder Collaboration

Policymakers, operators, and shippers must work together to address challenges like capacity and energy costs.

Sustainability and Driver Shortage

Environmental commitments and lorry driver shortages drive modal shift from road to rail, boosting CT growth.



Role of Port of Koper in Intermodal Transport

Strategic Location

Port of Koper is located at the crossroads of Baltic-Adriatic and Mediterranean corridors, enabling key European trade routes.

Improved Hinterland Connectivity

Second rail track between Divača and Koper enhances hinterland connections, cutting transit times and boosting reliability.

Intermodal Operations

Integration with rail networks supports efficient intermodal transport, encouraging modal shift and reducing emissions.

Digitalization and Efficiency

Digital initiatives like Port Community Systems and electronic freight information improve transparency and operational efficiency.



Key Infrastructure Projects

Divača–Koper Second Rail Track

This project doubles rail capacity to the port, reducing congestion and improving freight transport reliability.

Rail Line Modernization

Upgrades to Maribor–Šentilj and Pragersko rail lines align with TEN-T standards for speed and interoperability.

Cross-Border Data Interoperability

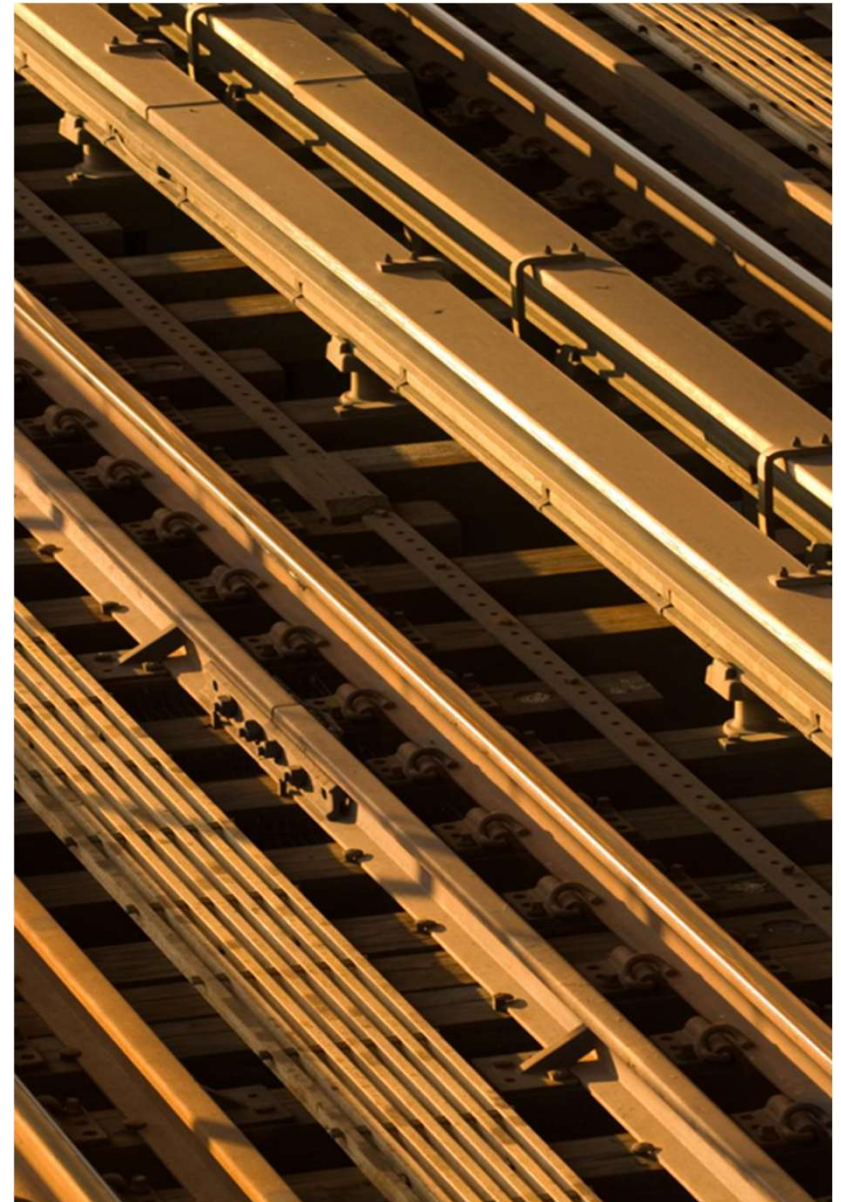
Linking Danube project promotes integrated multimodal information systems for seamless transport information exchange.

Support for Sustainable Growth

Projects aim to eliminate bottlenecks, increase throughput, and foster sustainable economic growth in line with EU goals.

Targets

Rail freight share +20%, CO₂ emissions -30% by 2035, export of logistics services +25%, and 80% digitalization of processes.



Role in Sustainable Logistics

Environmental Impact Reduction

Combined Transport reduces energy use by up to 70% compared to road-only freight, supporting climate goals.

Greenhouse Gas Emissions Cut

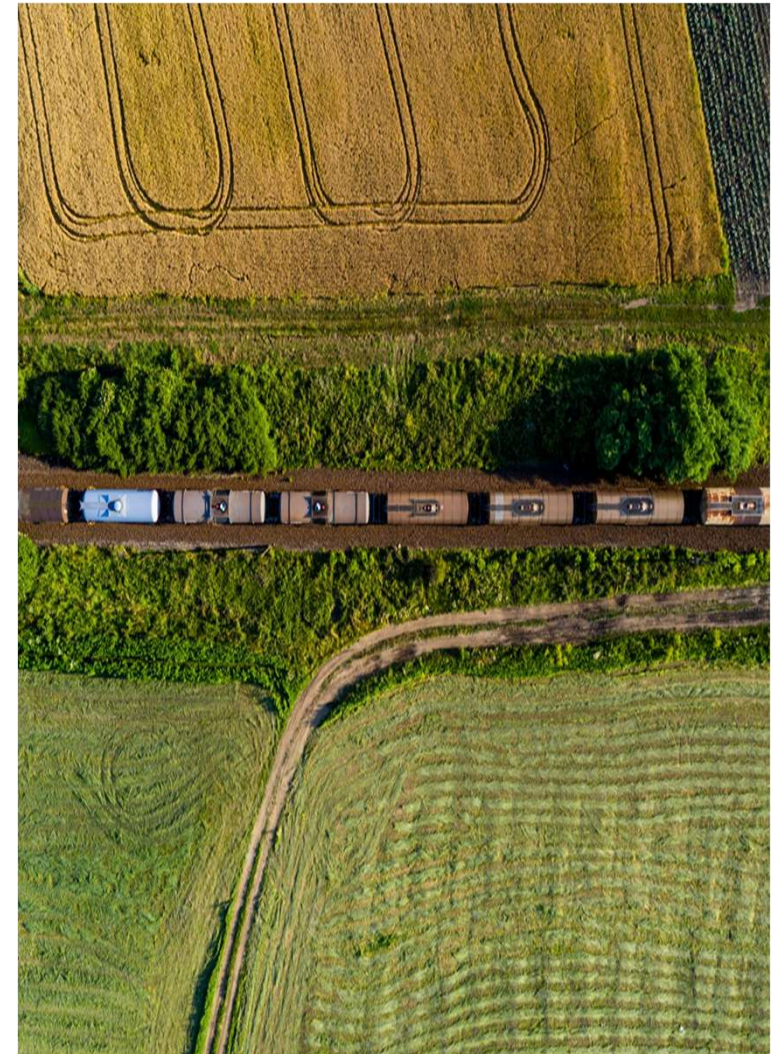
CT cuts greenhouse gas emissions by up to 90%, supporting EU climate goals and the Green Deal.

Traffic Congestion and Safety

Shifting heavy freight from roads to rail reduces congestion, improves safety by reducing accidents and reduces cargo theft risks on European highways.

Supply Chain Resilience

Multimodal networks in CT increase supply chain resilience by reducing vulnerability to disruptions and fosters job creation in terminal and rail services, boosting regional economies.



Infrastructure, Technology, and Market Dynamics

Infrastructure Bottlenecks

Closures and maintenance on key rail corridors limit capacity and reliability in combined transport networks.

Driver Shortage and Opportunities

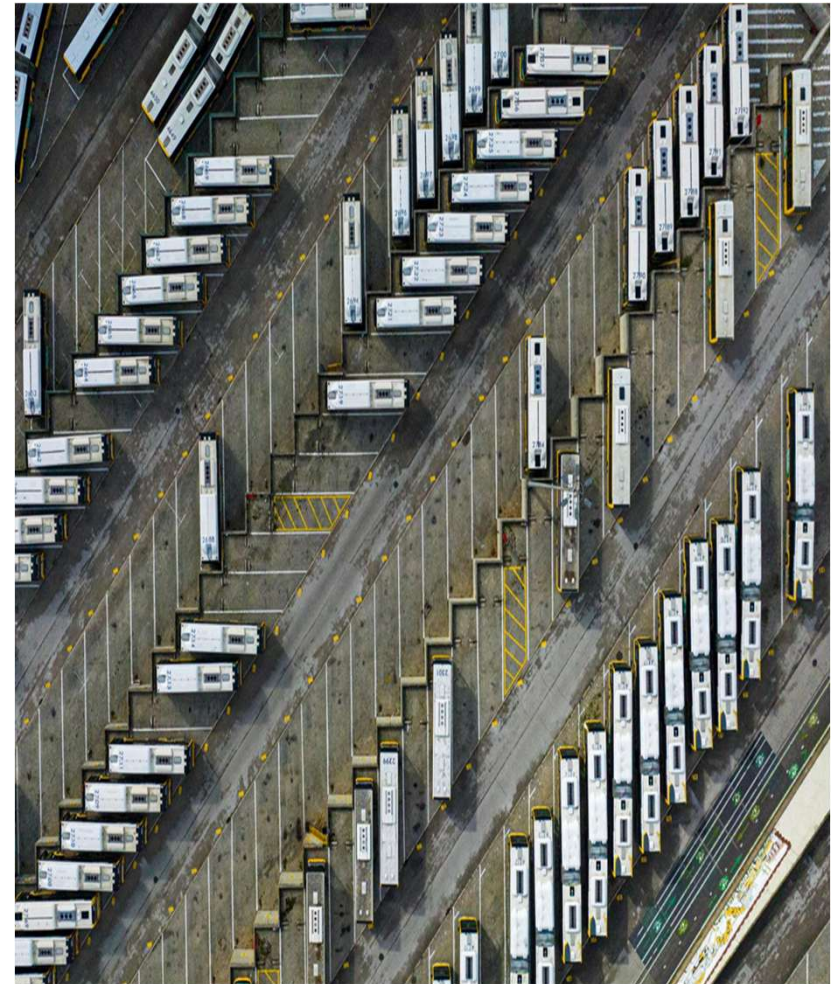
With over 233,000 lorry driver vacancies, shifting freight to rail can reduce road transport pressure.

Operational Costs and Risks

Rising energy costs and geopolitical issues disrupt supply chains and increase transport expenses.

Need for Transhipment Technologies

90% of semi-trailers are non-craneable, requiring investment in horizontal transhipment solutions.



EU Targets and Legislative Framework

Ambitious Rail Freight Target

EU aims to increase rail freight modal share to 30% by 2030 from the current 17%.

Legislative Initiatives

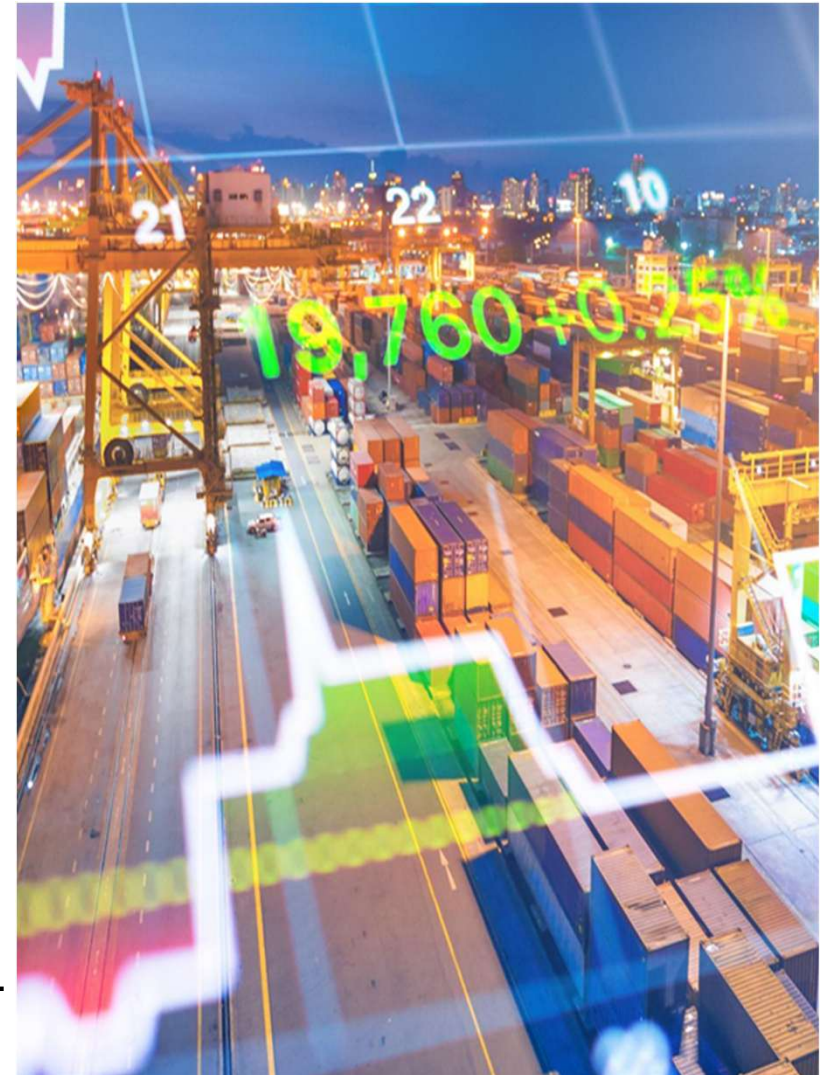
Key laws include Combined Transport Directive revision and Rail Infrastructure Capacity Management Regulation to optimize operations.

TEN-T Standards

TEN-T standards harmonize infrastructure with 740m train lengths, 22.5t axle loads, full electrification, and ERTMS deployment.

Digitalization and Sustainability

Regulations like eFTI and CountEmissionsEU promote digital freight management and environmental accountability.



Future Trends and Developments

Digitalization and Data Use

ICT and logistics data enable dynamic transport management, real-time cargo tracking, and better capacity utilization.

Multimodal Connectivity

TEN-T core network corridors boost efficient freight movement by enhancing multimodal transport across Europe.

Infrastructure and Investment

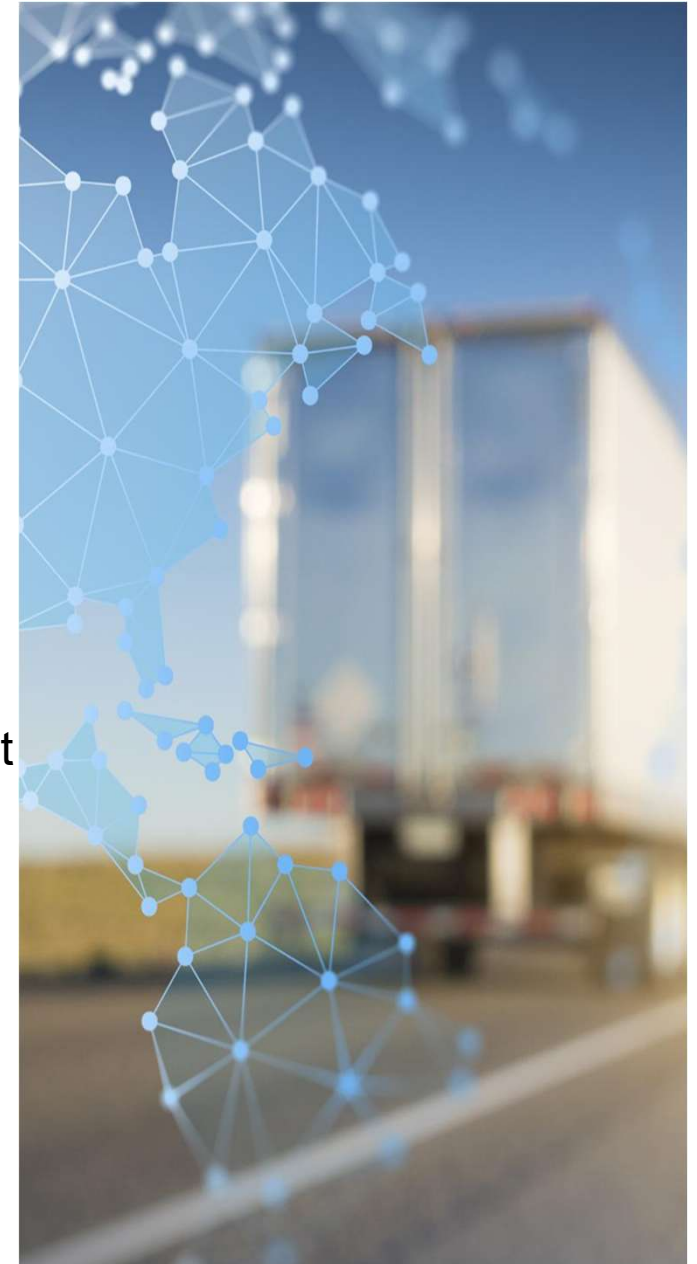
Achieving Transport White Paper goals requires coordinated stakeholder action and significant infrastructure investment.

Sustainable Innovations

New propulsion technologies and alternative fuels are vital to meet logistics sustainability targets. Policy and research efforts emphasize efficiency, emission reduction, and innovation through technology and partnerships.

Emerging Logistics Concepts

Nearshore production and 3D printing reshape transport demand, requiring adaptive logistics systems. Smart and sustainable logistics maintain EU competitiveness and address environmental and societal challenges effectively.



Conclusion

Slovenia's unique geostrategic position offers an opportunity to become a leading logistics hub in Central Europe. By leveraging digitalization, sustainability, and intermodal connectivity, Slovenia can secure its place on the European logistics map.

The strategy focuses :

1. Digital Transformation: Implement AI, IoT, and blockchain platforms for real-time cargo tracking and automated warehouses.
2. Sustainability: Promote Combined Transport and electric, hydrogen fleets, rail transport, and compliance with EU emission targets.
3. Intermodality: Strengthen links between Port of Koper, rail, and highways; build multimodal hubs in Ljubljana, Maribor, and Celje.
4. Workforce Development: Enhance education programs, digital skills, and attract talent.
5. Resilience: Develop local supply chains and crisis logistics scenarios.

Thank You Very Much for Your Attention

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