

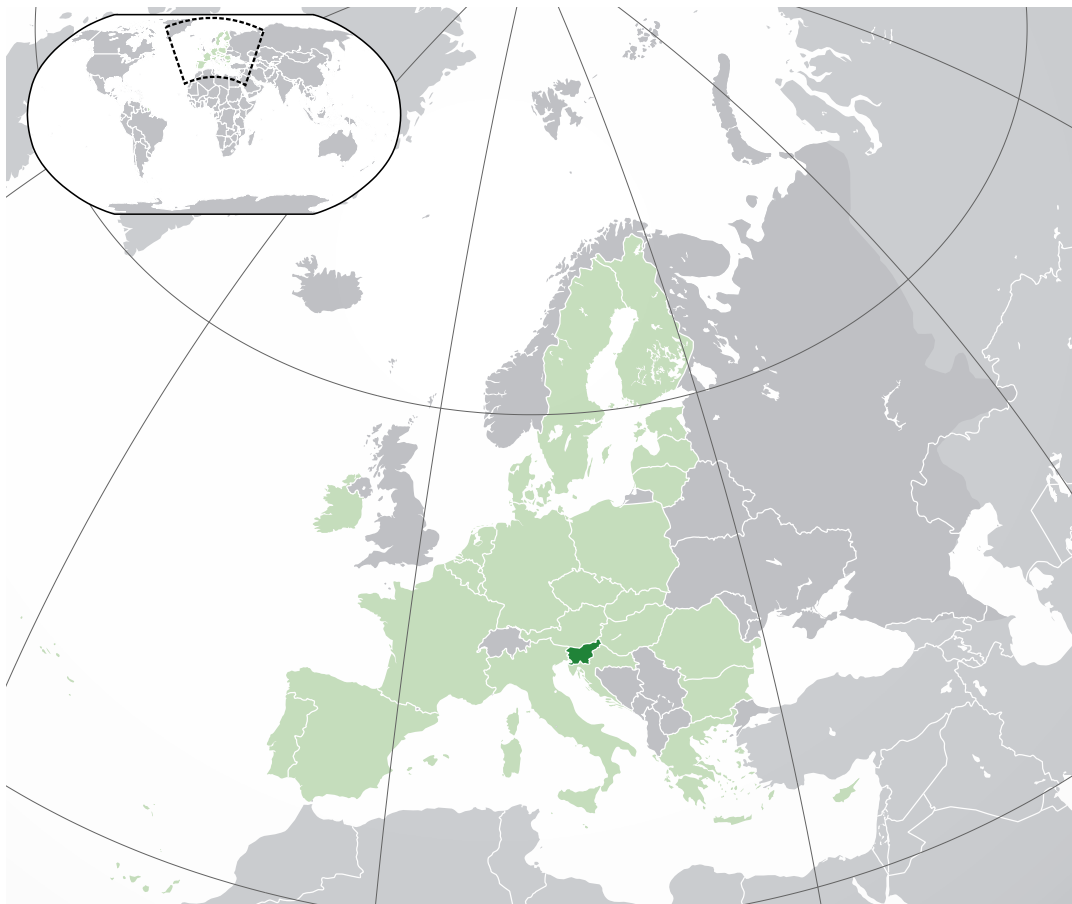


Comité National Routier



## EUROPEAN STUDIES

# Slovenian road freight transport in 2020





# Comité national routier (CNR)

in cooperation with

Visemont

## EUROPEAN STUDIES

Slovenian road freight transport

2020 study

Comité national routier - Paris

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The map on the cover comes from <https://commons.wikimedia.org/wiki/File:EU-Slovenia.svg>



## WARNING

Following on from the 2017 study devoted to the Slovenian RFT sector, which was published in 2018, this survey, which was conducted in 2020, is intended to provide updated statistics concerning the activity of this sector as well as about the typical operating conditions and costs for a 40-tonne heavy goods vehicle used for international long-distance transport.

In some cases, data may have been updated to reflect figures from 2021. The representative profiles given are the same as the ones used in the context of the economic conditions prevailing in 2020.

It is also important to note that this study was conducted during the Covid health crisis. Our analysis was intended to focus on pre-Covid figures, i.e. for 2019. However, during the interviews, Slovenian hauliers found it difficult to make a distinction between the situation in 2020 and that of the previous year. The Covid crisis has had a definite impact on the data contained in this study. This point thus needs to be taken into account when interpreting the findings.



## SUMMARY

A small Alpine country wedged between the developed Western European nations of Italy and Austria on the one hand, and Hungary and Croatia to the east on the other, Slovenia enjoys a strategic position as a bridge between these two different economic worlds. It was also the first country from the former Yugoslavian nations to join the European Union in 2004; it quickly went on to adopt the single currency in 2007.

Economically, Slovenia is often referred to as a model for other Eastern European economies. Its GDP and wages are now close to the Spanish level, exceeding those of Greece and Portugal.

As for its road freight transport (RFT) sector, the Slovenian sector is still under foreign influence, with most companies acting as subcontractors for their Italian or Austrian counterparts. The sector is exclusively internationally oriented, ranking as the tenth most active country in this category. As regards international cross-trade, Slovenia has overtaken certain Eastern European sectors such as Hungary and the Czech Republic, as well as the major historical Western European sectors such as Spain, Portugal, the Netherlands and Germany.

This updated survey of the Slovenian sector highlights the effects of labour shortages in the RFT sector. Moreover, the productivity of Slovenian drivers seems to be declining due to frequent returns to base and other labour demands. Annual driver mileage (116,000 km in 2020) is down 5% while annual driver costs have increased by 7.4%, resulting in a sharp rise in the cost of driving time (up 12%). In addition to the driver costs, most other cost items are soaring: +15% for tolls, +15% for insurance, +10% for tyres and maintenance.

Up 5% since the last RFT survey in Slovenia in 2018, the increase in the per kilometre costs seems to be under control, however, thanks, in particular, due to exceptionally low fuel prices during the 2020 Covid crisis. Ultimately, the average cost per kilometre of a 40-tonne Slovenian heavy goods vehicle operating on international routes was 0.94€/km.





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# 1. ECONOMIC AND SOCIAL ENVIRONMENT OF THE SLOVENIAN SECTOR

## 1.1. SLOVENIA IN BRIEF

Capital	Ljubljana
Area	20,273 km <sup>2</sup>
Population	2,108,977 inhabitants
Official EU language(s)	Slovenian
Political system	Parliamentary Republic
President of the Republic	Borut Pahor
Prime Minister	Janez Jansa
Minister of Transport	Jernej Vrtovec, since 13 March 2020
Date of EU membership	1 May 2004
Date of adoption of the euro	1 January 2007
Seats in the European Parliament	8 seats
European Commissioner	Janez Lenarcic, Crisis Management Commissioner
GDP growth (%)	+ 3.2% in 2019, - 5.5% in 2020 (Eurostat)
Inflation (%)	- 0.3% (Eurostat, 2020)
Unemployment rate	5.0% (Eurostat, end 2020)
(% of active population)	
Trade balance	-2.391 billion euros (2020)
Gross monthly minimum wage	1024.20€ per month (as of 1 January 2021)
Greenhouse gas emissions	8.2 tonnes/inhabitant (Eurostat, 2019)

## 1.2. SLOVENIAN ROAD FREIGHT TRANSPORT

### TRANSPORT AND INFRASTRUCTURE POLICY

#### *Transport policy*

The transport policy of the Republic of Slovenia is described in detail in the latest version of the “Transport Development Strategy in Slovenia until 2030”, published by the Ministry of Infrastructure. The main objectives mentioned in the document are:

- Improving transport mobility and accessibility
- Improving the contribution of transport to the national economy
- Improving public safety and security
- Reducing the need for energy
- Reducing user and operator costs
- Reducing the environmental footprint

The strategy refers to the implementation of a national transport model developed internally and externally (within and outside the EU) and considers environmental impact and road safety modelling. The ministry maintains that several fundamental problems will emerge soon if nothing is done to improve the overall approach to transport. These problems include:

- The disappearance of public transport provision in favour of individual modes of transport
- Rail replaced by road transport, causing more and more congestion
- Disconnection of provinces from the main network, clustering around large cities
- A halt in the development of the port of Koper due to the lack of rail transport
- The impossibility of achieving the environmental objectives and limits adopted by the EU

To avoid these potential problems, the Ministry of Infrastructure first suggests optimising the use of existing transport infrastructure capacity through the introduction of smart management systems. Secondly, a certain amount of investment in the most environment-friendly modes of transport is deemed necessary. The full document details a set of 108 measures to be adopted (including 29 for rail and 37 for road) in order to transform the transport landscape and modal balance in Slovenia.

The programme outlined in the document is expected to have a significant impact on environmental protection and is judged to be sufficient to comply with existing European regulations and targets. The specific investment projects and their impact on transport and the environment are all set out in the following 265-page document: <https://www.gov.si/assets/ministrstva/MZI/Dokumenti/Transport-Development-Strategy-of-the-Republic-of-Slovenia-Until-2030.pdf>

Modal split of freight transport in % (based on t-km)

2019	Road	Rail	Inland waterways
European Union	77.4%	22.6%	5.6%
Slovenia	35.5%	64.5%	0.0%

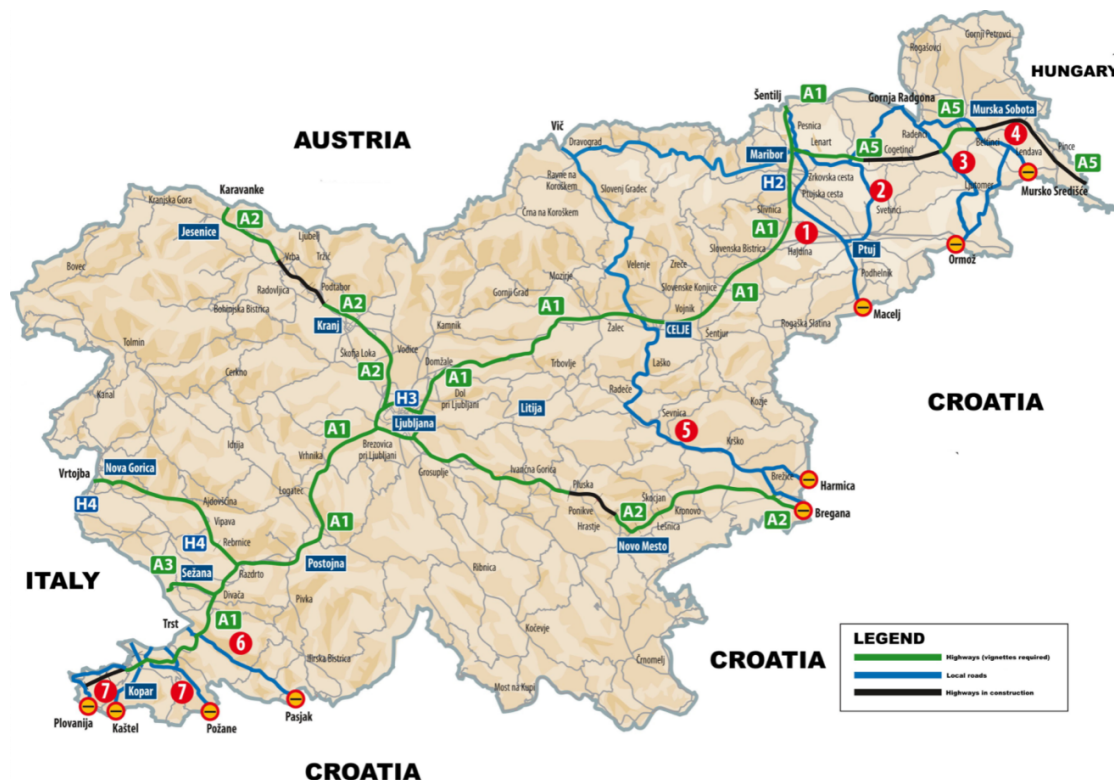
Source: Eurostat

Slovenian road infrastructure is well developed and contributes to the functioning of a fluid road network in Southern Europe, particularly along the east-west axis between Italy and the Balkans as well as from north to south between northern Italy and Central European countries, mainly Austria and Hungary.

Motorways and 4-lane national roads, which are subject to tolls, are managed by the Highways Company of the Republic of Slovenia, are well maintained and comply with European standards. While vehicles of 3.5 tonnes and less are required to purchase a toll sticker, vehicles of more than 3.5 tonnes subject to a mileage charge via the DarsGo system. There is a special fee for use of the Karawanken tunnel.

### Highways of Slovenia

(Green: motorways, Blue: national roads subject to mileage-based tolls, Black: motorways under construction)



With regard to the railway network, Slovenia laments having long neglected the latter in favour of the road network for mainly financial reasons. The country's main railway lines connect the port of Koper to Ljubljana and Maribor before continuing eastward to link up with the Hungarian rail network. Major regional development projects have been launched to integrate the Slovenian, Croatian and Serbian networks via a multinational infrastructure management company. This project, supported by the EU, has not yet been launched but may in the future come to include other national rail networks such as those in Bosnia and Northern Macedonia.

### Slovenian rail network

(Red, electrified lines, Pink: non-electrified lines, Thick lines: main network, Narrow lines: secondary network, Double lines: freight network only)



Slovenia's main airport is located in Ljubljana (centre). Two other airports, Maribor (East) and Portoroz (West, near Koper), serve as back-up airports during the summer period.

Transport Infrastructures of Slovenia

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Length of "main" routes (national and provincial)</b>	5,769 km	5,764 km	5,775 km	5,938 km	5,938 km	5,926 km	5,920 km	5,917 km	5,917 km	5,917 km
of which highways	332 km	350 km	550 km	644 km	683 km	747 km	747 km	763 km	823 km	866 km
<b>Other local roads</b>	82,054 km	83,388 km	83,635 km	84,065 km	84,501 km	85,173 km	85,333 km	85,336 km	85,411 km	85,525 km
<b>Length of rail network</b>	10,785 km	10,777 km	10,777 km	10,768 km	10,777 km	10,770 km	10,774 km	10,774 km	10,765 km	10,759 km
of which electrified	4,020 km	4,020 km	4,020 km	4,029 km	4,029 km	4,030 km	4,030 km	4,030 km	4,029 km	4,029 km
<b>Length of inland natural waterways</b>	1,647 km	1,647 km	1,647 km	1,647 km	1,647 km	1,647 km	1,647 km	1,647 km	1,647 km	2,453 km
<b>Length of inland channels</b>	132 km	132 km	132 km	132 km	132 km	132 km	132 km	132 km	132 km	182 km

Source: Eurostat

## ROAD FREIGHT TRANSPORT OPERATORS

### *Institutional stakeholders*

#### *Slovenian Infrastructure Department (DRSC)*

The Infrastructure Department is responsible for ensuring the construction, maintenance and repair of major and regional roads and the maintenance of the national cycle network. It is also the body responsible for building, renovating and modernising public rail infrastructure.

Through its works, it aims to improve transportation, by ensuring road safety as well as the accessibility and user-friendliness of public transport infrastructure, thus contributing to the economic and spatial development of individual towns and the State as a whole, while at the same time reducing the impact on the climate and the environment.

#### *Slovenian Road Safety Agency*

The Slovenian Road Safety Agency is active in driver training (driving schools, re-training programmes) as well as in the technical aspects of motor vehicles (certification, annual technical inspections, etc.). It organises preventive training in its training centre and runs advertising campaigns to promote road safety.

### *Professional RFT organisations*

#### *GIZ – Intertransport Group*

GIZ is the main association of Slovenian carriers operating internationally, especially in Eastern European and non-EU countries. GIZ is the only Slovenian member of the IRU and thus represents the sector internationally. In 2019, the association had approximately 1,000 members.

However, the association is small as it is focused on international carriers, most of whom have not renewed their membership due to the opening up of the country to the European market, which means that there is little need for associations to support hauliers.

The main purpose of GIZ is to assist carriers with ATP and CMR forms, as well as TIR carnets. In addition, GIZ organizes conferences and congresses. Recently, the association began organising driver training as part of a national project aimed at ensuring that drivers are better suited to the realities of the current market.

#### *Slovenian Chamber of Commerce and Industry (Gospodarska zbornica Slovenije - GZS)*

The Chamber has a department that deals mainly with the transport sector and is known as the "Transport Association (*Združenje za promet*)".

This is the body that is responsible for the registration of motor vehicles and trailers (*Sekcija strokovnih in registracijskih organizacij motornih in priklopnih vozil*).

The Transport Association is a non-commercial public body; membership is not mandatory but its members enjoy substantial benefits:

- Access to information and support for companies.
- Active promotion and development of the RFT sector by means of numerous projects.
- Preparation of briefing notes and recommendations on the subject of transport regulations in Slovenia and at EU level.
- Attendance at preparatory meetings between the ministry and the Association for the drafting of bills.
- Membership of various international associations to gain access to larger markets and more information.
- Representation of members in international bodies.
- Involvement in public funding projects to develop the transport sector.
- Involvement in labour negotiations in the transport sector.
- Courses, internships, seminars and conferences organised by the Association are available to members.
- Opportunity to participate in state visits by accompanying elected representatives during their visits abroad.
- Involvement in the development of professional training courses.
- Assistance with preparing tenders in domestic and international markets.

The main objective of the Association is to provide information (advice for current and future members), vocational training and to represent the interests of the profession vis-à-vis other bodies. The Ministry of Infrastructure usually prepares new regulations and proposes draft legislation in cooperation with the Transport Association.

The Association now represents more than 5,000 carriers, i.e. more than 90% of the sector. There are very few small companies among its members. The latter are represented by the Chamber of Trades (OZS).

At the international level, the Transport Association cooperates with other associations as part of its involvement with the IRU, the International Federation of Freight Forwarders and Similar Associations (FIATA) and the European Association for Forwarding, Transport, Logistics and Customs Services (CLECAT).

[Transport Section of the Slovenian Chamber of Trades and Small Enterprises \(Obrtna Zbornica Slovenije - OZS\)](#)

This body brings together small and medium-sized companies and now has more than 4,000 members, 75% of whom are small road hauliers.

Under agreements with the national authorities, the OZS has responsibility for the following:

- Issuance and withdrawal of EU road transport licences.
- Issuance of driver certificates to non-EU drivers.



- Issuance of international transport permits to domestic carriers, including EMTC permits.
- Preparation of supporting documents for Russian visa applications and for Turkish authorities.
- Verification and certification of professional qualifications for the purposes of obtaining the NVQ (National Vocational Qualification) certificate.

OZS is also active internationally through its partnerships in Germany, Austria, Italy and Croatia. Like the Transport Association, OZS is also called on by the Ministry to participate in the process of developing new transport regulations.

#### *Trade union organisations*

##### *Federation of Drivers and Mechanics Associations in Slovenia (ZŠAM)*

ZŠAM is a member of the UICR. The federation's is responsible for representing drivers and mechanics in all areas of the RFT sector. It liaises between drivers and employers. It also organises road safety training for its 7,800 members.

## THE SLOVENIAN RFT SECTOR IN 2019 – KEY DATA

### Structure of the Slovenian RFT sector in 2019

Structure of the Slovenian RFT sector in 2019

2019	Goods transported	Tonne-kilometers achieved		Average distance	Vehicle.kilometres achieved
	thousand tonnes	million t.km	%	km	million of vehicle.km
<b>TOTAL</b>	<b>91,775</b>	<b>24,011</b>	<b>100.0%</b>	<b>262</b>	<b>1,509</b>
Domestic transport	54,439	2,303	9.6%	42	208
International transport	37,336	21,706	90.4%	581	1,301
<i>International transport of goods loaded in Slovenia</i>	11,199	5,618	23.4%	502	356
<i>International transport of goods unloaded in Slovenia</i>	8,237	4,261	17.7%	517	263
<i>Cross-trade</i>	13,305	10,563	44.0%	794	606
<i>Cabotage</i>	4,595	1,263	5.3%	275	76

Source : Eurostat

Accounting for more than 90% of total activity, the Slovenian sector has one of the highest international activity rates in Europe. Despite being very important for the sector, domestic activity does not account for much in terms of volume due to the very short distances involved, a consequence of the small size of the country. The average distance of international trips (approx. 500 km round trip) correspond to the Slovenian sector's strong ties to its Italian and Austrian neighbours. International cross-trade, which accounts for nearly 44% of total activity, is broader in scope and covers most Central European countries. Slovenian cabotage, which represents 5.3% of total activity, is growing.

### Evolution of the Slovenian RFT sector

Evolution of the Slovenian RFT sector in million tonne-kilometres

In million t-km	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR*
<b>TOTAL</b>	<b>14,762</b>	<b>15,931</b>	<b>16,439</b>	<b>15,888</b>	<b>15,905</b>	<b>16,273</b>	<b>17,909</b>	<b>18,707</b>	<b>20,814</b>	<b>22,225</b>	<b>24,011</b>	4.94%
Domestic transport	2,276	2,288	2,177	1,849	1,889	2,062	2,069	2,134	2,310	2,256	2,303	0.12%
International transport	12,486	13,643	14,262	14,039	14,016	14,211	15,840	16,573	18,504	19,969	21,706	5.69%

\*Average annual growth rate

Source : Eurostat

The Slovenian sector's domestic activity has been stable for at least 10 years, while international activity has grown significantly since the country joined the EU in 2004. A significant drop in this activity was nevertheless observed in 2020 due to the Covid crisis, but Slovenian hauliers experienced powerful upturn in business starting in the autumn of 2020.

## Cabotage

**Total cabotage under Slovenian flag and the 3 main "cabotaged" countries**

In million tonne-kilometres	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR*
<b>Cabotage under Slovenian flag</b>	<b>360</b>	<b>407</b>	<b>503</b>	<b>475</b>	<b>551</b>	<b>653</b>	<b>765</b>	<b>936</b>	<b>1 059</b>	<b>991</b>	<b>1 263</b>	<b>13.37%</b>
<i>in Germany</i>	158	179	194	229	203	258	375	435	468	418	473	11.59%
<i>in Italy</i>	106	128	157	106	173	172	142	248	272	214	291	10.63%
<i>in Austria</i>	35	58	94	93	132	121	154	155	192	222	277	22.98%
<b>Share of cabotage in Slovenian transport %</b>	<b>2.4</b>	<b>2.6</b>	<b>3.1</b>	<b>3.0</b>	<b>3.6</b>	<b>4.0</b>	<b>4.3</b>	<b>5.0</b>	<b>5.1</b>	<b>4.5</b>	<b>5.3</b>	-

\*AAGR : average annual growth rate

Source: Eurostat

Slovenian cabotage has quadrupled in volume over the last ten years with an average annual growth rate of 13% over a period of this period. Its main markets, Germany (Bavaria), Italy (North) and Austria are also the main markets for cross-trade.

**Cabotage in Slovenia**

In million tonne-kilometres	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	AAGR*
Cabotage in Slovenia	4	2	12	9	8	11	10	10	43	33	30	22.32%
Penetration rate of cabotage*	0.18%	0.09%	0.55%	0.48%	0.42%	0.53%	0.48%	0.47%	1.83%	1.44%	1.29%	-
Market share cabotage**	0.27%	0.14%	0.83%	0.72%	0.60%	0.76%	0.69%	0.65%	2.62%	2.03%	1.81%	-

AAGR : Average annual growth rate

Source : Eurostat

\*cabotage foreign flag / (total domestic transport + cabotage under foreign flag)

\*\*cabotage foreign flag / (domestic transport for hire and reward + cabotage under foreign flag)

Slovenia carries out 40 times more cabotage than is carried out on its soil by other national sectors. The cabotage activity in Slovenia is extremely localised and takes place between the capital Ljubljana and the port of Koper.

## RFT companies

There are approximately 5,500 transport companies in Slovenia, a number that has been stagnating for several years.

Two thirds of these companies are small, with between 1 and 5 vehicles. Almost three-quarters of Slovenian companies specialise in international transport, the vast majority of which are focus mainly on Italy, Germany and Austria. Since the port of Koper, like that of Trieste in Italy, is an important European gateway for the Turkish sector through due to the RORO transport of trucks and trailers, a third of Slovenian companies operating in the south of the country are estimated to be subcontractors for Turkish companies.

The latest available organisational statistics for RFT companies in Slovenia for the year 2019 provide the following picture:

**RFT\* Business Statistics in Slovenia  
(Latest available data in 2019)**

	2019
Number of enterprises	5,751
Number of persons employed	29,277
Number of employees	26,102
Net sales	3,248,997 k€
<b>Costs</b>	
Total amount of purchased goods and services	2,159,365 k€
of which merchandise	349,792 k€
of which materials, supplies and intermediate goods	313,827 k€
of which temporary work or sub-contracting	163,434 k€
Personnal expenses	509,744 k€
of which wages and salaries	446,095 k€
of which social security costs	63,659 k€
Gross operating profit	419,258 k€

\* RFT companies as in European Nomenclature NACE Rev2 - Classe H4941

Source : Statistical office of Slovenia

### Vehicle fleet

There is very little data available on RFT vehicles in Slovenia. The only data available are from Eurostat, which indicate that the country has 16,751 tractors and 12,668 semi-trailers. According to the professionals interviewed in Slovenia, there are indeed approximately 17,000 motor vehicles currently in operation in Slovenia, which is consistent with Eurostat figures. The unusually low number of semi-trailers would seem to reflect the fact that Slovenian hauliers tend to work on behalf of Italian, Austrian and Turkish RFT companies.

Vehicle Statistics in Slovenia						
		2015	2016	2017	2018	2019
Road tractors	Total	11,326	12,981	14,330	15,928	16,751
	Less than 2 years	2,480	3,149	3,527	3,694	3,443
	2 to 5 years	3,310	3,564	4,342	5,571	6,022
	5 to 10 years	4,419	4,892	4,617	4,445	5,398
	10 to 20 years	928	1,175	1,647	2,013	1,683
	More than 20 years	189	201	197	205	205
Semi-trailers	Total	8,984	9,933	10,885	11,898	12,668

nd : non disponible

Source : Eurostat

## 1.3. FISCAL AND LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT IN SLOVENIA

### TYPES OF COMPANY

<b>Types of companies in Slovenia and their main characteristics</b>	
<b>Partnerships</b>	
<b>Sole proprietorship (Samostojni podjetnik)</b>	
Number of partners and associates:	only one physical person
Minimum and/or maximum capital:	no limitation
Liability of partners:	the owner bears unlimited sole liability.
<b>General partnership (Družba z neomejeno odgovornostjo or d.n.o.)</b>	
Number of partners and associates:	minimum two partners
Minimum and/or maximum capital:	no limitation
Liability of shareholders:	The owners are jointly and severally liable for any legal actions and debts the company may face
<b>Capital companies</b>	
<b>Limited liability company (Družba z omejeno odgovornostjo or d.o.o.)</b>	
Number of partners and associates:	at least one person
Minimum and/or maximum capital:	7,500 € minimum
Liability of shareholders:	the liability of shareholders is limited to the amount of the contributions
<b>Public limited company (Delniška družba or d.d.)</b>	
Number of partners and associates:	at least one person
Minimum and/or maximum capital:	25,000 € minimum
Liability of shareholders:	the liability of shareholders is limited to the amount of the contributions
<b>Limited partnership (Komanditna družba or k.d.)</b>	
Number of partners and associates:	minimum two partners
Minimum and/or maximum capital:	no limitation
Liability of shareholders:	the liability of partners is restricted to their fixed contributions to the partnership.

Source : Société générale - France

### ROAD FREIGHT TRANSPORT TAXES

#### *Corporate tax (CIT)*

Corporate income tax is governed by the Corporate Income Tax Act (CIT-2). It applies to legal entities as defined by national law, legal entities under foreign law or associations of persons under foreign law that do not constitute a legal entity. Companies not resident in Slovenia must pay tax on any income generated by activities carried out within the country.

Set at 18% until 2012, the corporate tax rate fell to 17% in 2013 before rising to 19% in 2017 and has remained unchanged since then.

It is payable once a year based on the operating profit generated during the company's last financial year. A rate of 0% is applied to investment funds and pension funds if they meet certain conditions.<sup>1</sup>

## VAT<sup>2</sup>

The standard VAT rate in Slovenia is 22% and it applies to the majority of goods and services.

There is also a reduced rate of 9.5%. This rate is applied to food products (except alcoholic beverages), medicines and medical equipment, personal transport, entry fees for cultural and sporting events, copyright, works of art (both locally produced and imported), primary residences, renovation and restoration work, cleaning of private households, animals and phytosanitary products, accommodation rental, use of sports facilities, sanitation services, public hygiene services, minor repairs (bicycles, leather goods, etc.), home care services, hairdressing services and the gardening supplies.

A special reduced rate of 2% applies to cultural goods such as books, newspapers, periodicals as well as to any other publication (in physical form or supplied electronically), musical works, printed or handwritten, with the exception of products that are wholly or mainly intended for advertising.

## *Axle tax or annual tax for the use of motor vehicles (Letna dajatev za uporabo vozil v cestnem prometu)*

In 2008, Slovenia introduced an annual motor vehicles tax. Motorcycles and cars used by individuals, heavy goods vehicles and buses are in principle subject to this tax. The amount of the tax is 22.86€/tonne for heavy goods vehicles whose GVWR exceeds 4 tonnes.

However, since 2014, Slovenia has benefited from a derogation from European regulations on the basis that heavy goods vehicles are obliged to use motorways. Lorries are thus exempt from this tax but are subject to the mandatory payment of the road tax, also known as the traffic tax. However, heavy goods vehicles (except agricultural tractors) operated locally and which do not pay the road tax remain subject to the motor vehicles tax.

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<sup>1</sup><https://tradingeconomics.com/slovenia/corporate-tax-rate#:~:text=Corporate%20Tax%20Rate%20in%20Slovenia%20is%20expected%20to%20reach%2020.00,according%20to%20our%20econometric%20models>

<sup>2</sup> <http://www.pisrs.si/Pis.web/pregledPredpisa?id=ZAKO4701>

## Motorway tolls and other infrastructural masterpieces



DARS is responsible for the construction and maintenance of Slovenian motorways. The Slovenian State owns 100% of this company, which was founded in 1993. Vehicles of less than 3.5 tonnes are required to purchase a toll sticker for the use of motorways.

Other heavy goods vehicles must pay a toll, the amount of which is set by DARS for each motorway section or per kilometre travelled, depending on the payment option chosen.

In the case of the so-called “open” toll system, the toll amount depends on the estimated distance, and not on the distance actually travelled. The user pays the toll only if they go through a toll station. Payment of the “open” toll at Slovenian toll stations for vehicles with a maximum authorised weight exceeding 3.5 tonnes is made directly at each toll station by means of the prepaid *Multicard* card.

In the case of pre-payment, an electronic device needs to have sufficient funds paid in advance, from which the system deducts the toll amount each time the vehicle passes through a toll station. The toll depends on the category of vehicle and the time of day, with a discount at night (10 p.m. to 6 a.m.).

As part of the so-called “closed” DarsGo electronic toll payment system, a box provided by DARS is installed in vehicles. Each time the vehicle passes beneath a gantry, the box is detected, and this is used to charge for the relevant stretch of road. The toll is automatic and the price is based on the distance travelled. Tolls are charged separately for each stretch. The total amount invoiced depends on the distance travelled, the type of vehicle, number of axles or the EURO standard involved.

Vehicle categories based on the number of axles and weight		
R3		Motor vehicles (or articulated vehicles) with a total of 2 or 3 axles and a GVWR of more than 3.5 tonnes
R4		Motor vehicles (or articulated vehicles) with more than 3 axles and a GVWR of more than 3.5 tonnes

For category R3 vehicles, the per-kilometre of the toll (excluding VAT) is 0.205940€ compared to 0.428356€ for category R4 vehicles. Thus a 40-tonne HGV with 5 axles will pay 0.428356€/km in tolls. Prices have remained unchanged since 2017.

The Karavanke Tunnel (Karawanken Tunnel in Austria) is 7,864 metres long and leads to Austria. It is subject to a separate pricing scheme.

Karavanke Tunnel Toll in Slovenia - 2020		
Category	Type of vehicle	Toll
1	Vehicles with maximum weight < 3,5 T	6.50 €
2	Vehicles with 2 axles and maximum weight > 3,5 T	10.50 €
3	Vehicles with 3 axles and maximum weight > 3,5 T	15.00 €
4	Vehicles with more than 3 axles and maximum weight > 3,5 T	22.50 €

### Toll sticker

Since 1 July 2008, a toll sticker has been mandatory for all vehicles with a maximum authorised weight under 3.5 tonnes wishing to use Slovenian motorways and urban motorways for a specified period. The price of the annual sticker for light utility vehicles is 220€.

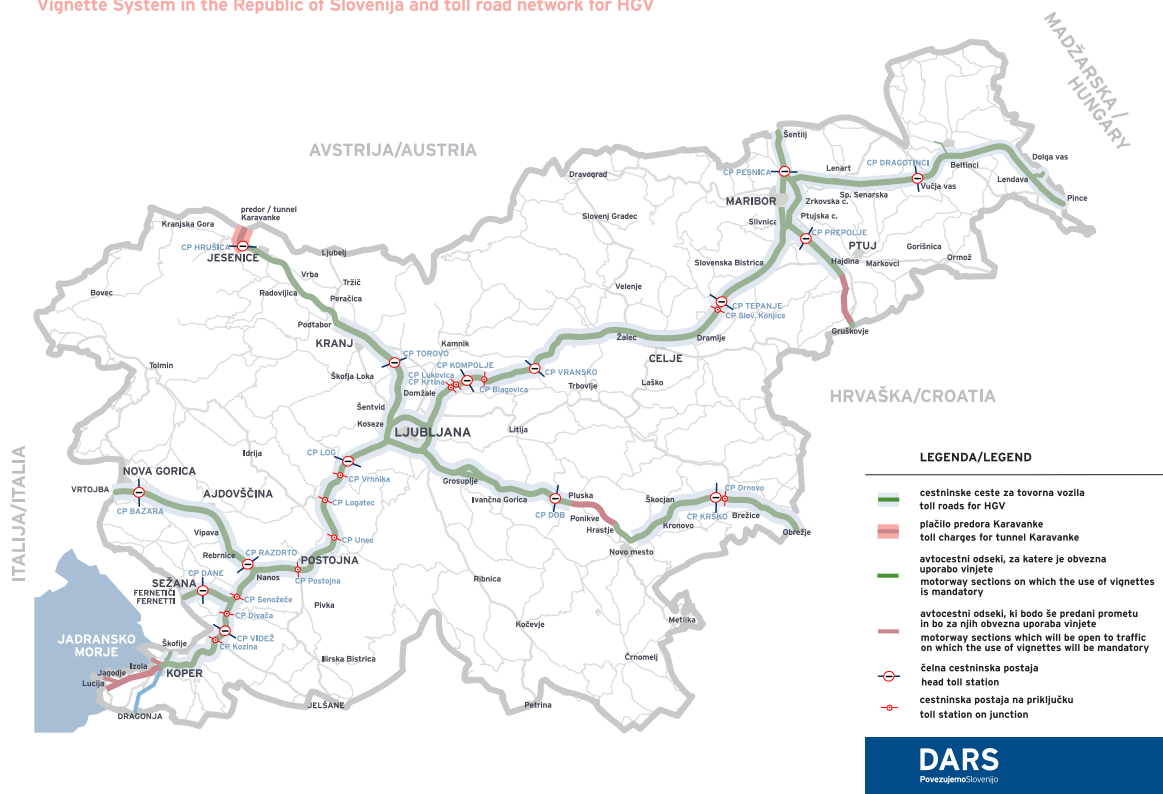
Since 1 January 2020, the toll sticker is no longer required for 7.2 km section of the H2 motorway between Pesnica and Tezno. HGVs are still obliged to pay the toll.

The following map represents the Slovenian road and motorway network that is subject to tolls:



## Vinjetni sistem v Republiki Sloveniji in cestninjenje tovornih vozil

### Vignette System in the Republic of Slovenia and toll road network for HGV



### Map legend:

Green: toll mandatory for HGVs

Thick red: special charges

Thin red: future stretches of toll roads

### Excise duty on commercial diesel fuel

In Slovenia, it has been possible to obtain a rebate for a portion of the excise duty on diesel for vehicles with a GVWR equal to or greater than 7.5 tonnes since 1 July 2009. The amount of excise duties is not fixed. It is calculated depending on the price of fuel and includes an environmental tax as well as other indirect taxes. The rebate is not capped in terms of volume.

As of October 2020, excise duties amount to 46.394€/hl, comprising 38.767€/hl in basic excise duties, a strategic fuel stocks tax (1.166 €/hl), an energy surcharge (0.8€/hl), a surcharge for the development of renewable energies (0.99€/hl) and a CO<sup>2</sup> tax (4.671€/hl).

Beginning in October 2020, the partial reimbursement rate amounted to 5.767€/hl and remained unchanged for the whole of 2021. The partial repayment mechanism was suspended in February 2022.

The net rate of excise duties on commercial diesel is thus 40,63€/hl.

## LABOUR REGULATIONS APPLICABLE TO ROAD FREIGHT TRANSPORT

### Pay rates

Slovenia has the highest minimum wage among the new EU member states. In the wake of significant increases since 2018, the Slovenian minimum wage in 2021 was higher than in Portugal and was approaching the level of the Spanish minimum wage.

Evolution of the minimum wage in Slovenia		
Date	Monthly amount	Yearly evolution
01.01.2021	1,024.24 €	8.9%
01.01.2020	940.58 €	6.1%
01.01.2019	886.63 €	5.2%
01.01.2018	842.79 €	4.7%
01.01.2017	804.96 €	1.8%
01.01.2016	790.73 €	0.0%
01.01.2015	790.73 €	0.2%
01.01.2014	789.15 €	0.7%
01.01.2013	783.66 €	2.7%
01.01.2012	763.06 €	2.0%
01.01.2011	748.10 €	
01.03.2010	734.15 €	
01.08.2009	597.43 €	1.4%
01.08.2008	589.19 €	9.4%
01.03.2008	566.53 €	
01.08.2007	538.53 €	3.2%
01.08.2006*	521.83 €	

\*Conversion into euro at the official exchange rate

Source : Ministry of Labour, Slovenia

There used to be a collective agreement in the RFT sector, but it is no longer in force. The collective agreement in the road haulage sector in Slovenia was in force from 19 August 1999 to 31 December 2003. Currently, there is no collective agreement in the RFT sector. Slovenian law (*Zakon o kolektivnih pogodbah – ZKo*) still provides for the establishment of collective agreements in economic sectors such as RFT and workers' unions are fighting for their establishment in several sectors, including in RFT. Pending the outcome of industrial negotiations, working conditions and wages are defined by company contracts, which employees automatically consent to when they sign their employment contract.

At the end of 2020, when this study was carried out, it emerged that Slovenian truck drivers were often paid at a level slightly above the existing minimum wage. Their salary is often

supplemented by bonuses and travel allowances, with companies usually guaranteeing a basic minimum amount.

#### *Paid leave and holiday bonuses*

All employees on permanent full-time contracts receive 20 days of paid leave per year (paid leave law, or *Zakon o delovnih razmerjih – ZDR*). This paid leave is an employee prerogative and not an obligation, which means that individuals may opt to work instead of taking their paid leave and thus receive compensation for leave days that they have not availed of.

Slovenian employers are also required to pay employees a holiday bonus that cannot be less than the minimum wage, i.e. 1,024.24€. In most cases, this bonus takes the form of a 13<sup>th</sup> month payment. The payment of this bonus must be made before 1 July of the year, unless the employer is in financial difficulty and expressly requests otherwise. In such cases, the payment may be postponed until 1 November.

The holiday bonus is considered income and is subject to tax but not to social security contributions. However, if the amount of the bonus exceeds 70% of the average gross salary in Slovenia in the relevant month (i.e. 2 months before the bonus is paid), the excess amount is subject to social security contributions. The holiday bonus can be split up or paid monthly depending on the company agreement in force.

There are 13 public holidays in Slovenia.

#### *Travel allowances (Dnevnice)*

In 2020 and 2021, the law provided for the following rates of allowance for travel within Slovenia:

Allowances for trips of between 12 and 24 hours: 21.39€ or 19.25€ if breakfast is already included with the accommodation.

Allowances for trips of between 8 and 12 hours: 10.68€ or 9.08€ if breakfast is already included with the accommodation.

Allowances for trips of between 6 and 8 hours: 7.45€.

In the case of travel abroad:

If the trip lasts only 6 to 8 hours, only 25% of the daily travel allowance for the country in question is not subject to tax or social security contributions.

If the trip lasts from between 8 and 14 hours, 75% of the daily allowance is not subject to tax or social security contributions.

If the trip lasts between 14 and 24 hours, the entire daily travel allowance is exempt from tax and social security contributions.

<b>Amount of daily allowances according to visited country</b>					
<b>In accordance with decret of Ministry of Labor of Slovenia 2020/2021</b>					
<b>Duration of travel</b>	<b>Between 14 hours and 24 hours</b>		<b>Between 8 hours and 14 hours</b>		<b>Between 6 and 8 hours</b>
<b>Country</b>	<b>with breakfast</b>	<b>without breakfast</b>	<b>with breakfast</b>	<b>without breakfast</b>	
Albania	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Germany	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Austria	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Belgium	63.00 €	56.70 €	47.25 €	40.16 €	15.50 €
Belarus	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Bosnia-Herzegovina	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Bulgaria	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Cyprus	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Croatia	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Czechia	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Denmark	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Spain	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Estonia	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Finland	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
France	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Greece	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Hungary	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Ireland	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Italy	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Latvia	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Liechtenstein	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Lithuania	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Luxembourg	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Malta	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Norway	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Netherlands	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Poland	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Portugal	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
Romania	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Russia	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Slovakia	40.00 €	36.00 €	30.00 €	25.50 €	10.00 €
Sweden	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €
UK	55.00 €	49.50 €	41.25 €	55.00 €	13.75 €

Source: Ministry of Labor of Slovenia

## Social security contributions

### Social contributions in Slovenia - 2020/2021

Social contributions applicable to driving staff in 2020 and 2021	Employer	Employee	Total
Old-age, Invalidity, Death Pensions	8.85%	15.5%	24.35%
Health Insurance, Health Care	6.56%	6.36%	12.92%
Unemployment	0.06%	0.14%	0.20%
Accidents at work and occupational diseases	0.53%	0.00%	0.53%
Parental protection	0.10%	0.10%	0.20%
<b>Total</b>	<b>16.10%</b>	<b>22.10%</b>	<b>38.20%</b>

Source: Eurostat, Cleiss et Ministry of Social Affairs of Slovenia

The employer “workplace accidents and occupational illnesses” contribution applies to the entire private sector. It is designed to compensate employees for temporary incapacity following an accident at work or an occupational disease. Long-term disability is covered by pension insurance (old age, disability, death).

Contributions are paid out of the total gross salary. Contributions are calculated on the basis of a minimum of 60% of the national average wage.

Self-employed workers must pay all contributions due by the employer and the employee, i.e. a total of 38.2%.

## Personal income tax

Tax rates for residents and non-residents are the same in Slovenia. Income tax is deducted at source.

Personal income tax in Slovenia in 2020 and 2021		
Income bracket		Tax rate
From	To	%
- €	8,500 €	16%
8,500 €	25,000 €	26%
25,000 €	50,000 €	33%
50,000 €	72,000 €	39%
Over 72,000 €	-	50%

Source : KPMG

The following annual deductions apply when determining taxable income:

Possible deductions in 2020 and 2021	
Basic allowance (total annual income less than 13,316.83 €)	3,500 € + (18,700.38 € minus 1.40427 x gross income)
Basic allowance (total annual income over 13,316.83 €)	3,500.00 €
Disabled persons for 100 %	17,658.84 €
For the 1st child in charge	2,436.92 €
For the 2nd child in charge	2,649.24 €
For the 3rd child in charge	4,418.54 €
For the 4th child in charge	6,187.85 €
For the 5th child in charge	7,957.17 €
Child with severe or moderate physical or mental handicap	8,830.00 €
Allowance for students	3,500.00 €
Supplementary pension	2,819.09 €

Source : KPMG

## 2. OPERATING CONDITIONS AND COSTS FOR A 40-TONNE SLOVENIAN HGV OPERATING INTERNATIONALLY

This part of the study describes the economic and social conditions prevailing at the end of 2020-beginning of 2021, at the time this updated study was conducted. In carrying out this study, the CNR has drawn on research focused primarily on the fiscal and social aspects of the RFT sector, as well as on previous CNR studies of the country and feedback from the experts with whom the CNR collaborates. These different sources provide an overview of the Slovenian RFT sector internationally and highlight the main developments observed since the last study. This research and process of dialogue are further backed up by interviews with Slovenian hauliers and lorry drivers.

All the figures eventually adopted by the CNR in order to construct the typical profile represent the best expert appraisal of this set of data sources.

### 2.1. OPERATING CONDITIONS AND COSTS FOR COMPANIES

This section is mainly based on face-to-face interviews with 12 Slovenian road freight transport companies involved in long-distance transport operations, mainly internationally. Among the companies visited, all were able to provide the information requested. Thus, the companies selected for this study have the following characteristics:

	Number of tractors	Number of semi-trailers	Main markets	Number of drivers	Turnover
Company 1	34	42	EU	32	4,909,091 €
Company 2	24	29	SLO,E,I,HR,P	28	4,198,347 €
Company 3	10	10	CH, F,B,NL,D,A, I, HR, CZ, SK	11	1,256,198 €
Company 4	2	2	20 European countries	2	257,025 €
Company 5	8	9	EU	7	1,190,083 €
Company 6	42	55	A,I,D,B,NL,LUX,F,UK	47	14,066,116 €
Company 7	36	50	UE, Andorre, Licht., Islande	38	5,013,000 €
Company 8	91	100	A,D	107	10,540,000 €
Company 9	10	10	UE,A,D,I	11	1,309,000 €
Company 10	32	35	EU	36	4,410,000 €
Company 11	4	4	EU	5	708,000 €
Company 12	37	49	F,PT, E, AT, HR	44	4,799,000 €

The companies visited for this study are extremely diverse in terms of their size and structure. They are all specialised in international RFT, and most are subcontractors or subsidiaries of foreign companies, often based in Italy and Austria. Small companies are often subcontracted by companies who are themselves subcontractors of larger foreign (mainly Italian) and Slovenian companies.

To enable a comparison with the data from other CNR country studies, only companies whose main activity is international long-distance freight transport have been selected.

The CNR is hereby reporting the results of these interviews, which have no statistical value. However, they do shed light on figures and information obtained elsewhere. Ultimately, the CNR uses figures based on expert opinion to establish the costs and operating conditions that pertain for a “typical” HGV operating internationally.

#### TRANSPORT EQUIPMENT – Use

Annual mileage, which is estimated at over 129,000 kilometres, has remained stable since 2017. Vehicles, which are operated 257 days per year (an increase compared to 2017), are used primarily for international transport (over 90%). Italy remains the leading market for Slovenian companies, followed by Austria and Germany. The figures used for this study do not take into account the extraordinary falloff in activity that occurred during the 2020 Covid crisis and the lockdown (from March to May 2020).

The length of time vehicles are kept varies greatly. In general, mindful of the need for flexibility in a volatile market, certain large companies (approx. 50 vehicles or more), have adopted the 3-year leasing approach, with vehicles being returned to the dealership and replaced; or not, as the case may be. Most companies opt to keep vehicles for 6 to 7 years, and this is the figure used by CNR in its calculations. A minority of Slovenian companies say they keep vehicles longer and operate them in Serbian, Bosnian and Greek markets.

As regards semi-trailers, Slovenian RFT companies seem to be careful about having the right type and number of semi-trailers at hand so as to be able to respond flexibly to the most general purpose types of business, which means that the number of vehicle-specific trailers is kept to a minimum. However, the number of semi-trailers remains quite high compared to the other Eastern European sectors surveyed. The average 10-year ownership period in Slovenia is in line with the European average and means that trailers can be resold for one tenth of their purchase price in neighbouring Balkan countries.

The tractor/semi-trailer ratio recorded during company surveys was 1.20, an increase compared to 2017.

#### TRANSPORT EQUIPMENT – Financing

The average purchase price of a Euro VI tractor established based on interviews with Slovenian hauliers is just under 95,000€, which is almost the same as the prices in major Western European markets. The purchase of expensive makes and models in the Slovenian sector seems to be determined by the need to offer a high level of service to the foreign customers. Slovenian hauliers do not buy second-hand tractors.

The purchase price of a semi-trailer is estimated at 23,600€, a figure that is below the European average due to reports by certain hauliers that they purchase used semi-trailers.

With the exception of a few large companies that prefer to exchange vehicles after three years of leasing, most of the companies surveyed use more conventional financing arrangements, such as financial leasing, with a 10% down payment and a purchase price equivalent to 10%



of the new vehicle price at the end of the lease period. This method of financing is used by more than half of the companies surveyed. Contract length varies between 4 and 5 years, with 4 years being the most typical period. Leasing contract interest rates are in line with the average for European sectors (2% annually).

Larger, more powerful companies have managed to secure lower rates of under 2%.

These data regarding purchasing practices, interest rates (estimated at 2% for tractors and 2.2% for semi-trailers) and leasing contract conditions allow the annual cost of owning a 40-tonne articulated semi-trailer to be calculated. The figure that emerges is approximately 14,725€, with a ratio of semi-trailer/tractor ownership of 1.20. This cost is slightly up (+3%) compared to the 2018 study and seems to be in line with what has been observed in other countries in the region.

## FUEL

The average unit cost of fuel for 2020 in Slovenia is 0.8620€ per litre at the pump. This figure has been revised downwards to take into account the partial recovery of excise duties i.e. 0.05767€/litre based on the rate in effect since October 2020.

Slovenian companies purchase more than 55% of their fuel domestically, of which almost 35% is purchased in bulk (with a discount of 0.02€/litre), while almost 20% is purchased at filling stations.

During international trips, carriers often have the opportunity to obtain supplies abroad. Thus, they report purchasing fuel in Austria (15% of total purchases at 0.8750€ per litre, excl. VAT), in Hungary (10% of total purchases at 0.8112€ per litre, excl. VAT and after the partial recovery of excise duties) but also in Germany (10% at 0.9441€ per litre, excl. VAT and after the partial recovery of excise duties) and even in Spain.

The average unit price of a Slovenian haulier's fuel shopping basket is thus estimated at 0.8235€.

Average fuel consumption is estimated at 29.2 litres per 100 km, down from an average of 30.0 litres in 2018.

## MAINTENANCE & REPAIRS

The cost of maintenance and repairs in the Slovenian sector is increasingly difficult to calculate due to the widely varying costs and approaches reported by the companies surveyed. During company interviews, some stated that they regularly exchange vehicles after 3 years of leasing. In this case, vehicle maintenance and tyre changes are often included in the lease deal. This increases the cost of owning vehicles but keeps the cost of maintenance and repairs to under 500€ per year per vehicle.

More generally, and based on a typical company profile, the CNR estimates that annual maintenance and repair costs range from 3,700€ for companies with their own workshop to 6,900€ for those who do not. Without an integrated workshop, this cost item is estimated at 5,450€ per year per semi-trailer, up from the 2018 estimate of 4,950€. This case, which has been used for the purpose of our analysis, represents the situation of more than 60% of the companies surveyed.

## TYRES

Those responsible for running most of the companies we visited frequently include the cost of fitting tyres in vehicle maintenance costs, while they put the cost of retreading under the heading of purchases of services, which are included in fixed costs. Semi-trailers, which are often fitted with used or retreaded traction tyres, may thus appear to have no tyre costs for accounting purposes.

According to interviews and in-house calculations, the CNR estimates the cost of purchasing tyres for a semi-trailer at an average of 4,400€ per year, i.e. 3.4 euro cents per kilometre, which is in line with company figures. This cost is significantly higher (up 10%) than in 2018.

## TOLLS

With regard to tolls, the situation seems similar throughout Europe. Virtually all companies complain about the substantial increase in this cost item due to the widespread increases in motorway charges across Europe over the past three years.

As is the case for most European sectors, the trend is to directly re-invoice tolls to customers depending on the chosen route and the deadlines involved.

In the case of Slovenia, the annual cost of tolls varies within a fairly narrow range, from 19,000€ up to 28,000€ in the case of some companies that have customers in Switzerland.

Overall, this cost item is estimated at 20,700€ for a 40-tonne articulated semi-trailer covering approximately 130,000 km per year (95% of which on motorways and toll roads). Up by more than 49% compared to 2018, this estimated cost does not include the cost of the Eurovignette, which is not commonly purchased by Slovenian hauliers.

## INSURANCE

Despite the 15% increase compared to 2018, the average cost of vehicle insurance in Slovenia remains at the bottom of the range usually observed in Europe. The cost of insurance is quite consistent, varying slightly depending on companies' accident rates.

According to in-house calculations, the annual amount of vehicle insurance used by CNR is 2,950€ for tractors and 500€ for semi-trailers, giving a total of 3,450€ per year for a 40-tonne articulated semi-trailer with comprehensive insurance.

## AXLE TAX

Slovenian carriers are exempt from the axle tax but are obliged to use motorways within Slovenia.

## FIXED COSTS

Based on the analysis of the data provided by operators interviewed on-site as well as best expert opinion, this cost item was estimated at between 9% and 12% of total vehicle cost, with a clustering around 10%. Accordingly, annual fixed costs are thus estimated to be approximately €12,000 per year per vehicle in the Slovenian sector.

## 2.2. EMPLOYMENT CONDITIONS AND DRIVER EMPLOYMENT COSTS

Employment conditions and driver pay in Slovenia were surveyed during two rounds of interviews: a first phase in companies with employers; and a second phase, involving face-to-face interviews with drivers in car parks and rest stops in Italy. During this second phase, around twenty drivers, employees with Slovenian contracts, volunteered to be interviewed about their working conditions and pay.

Based on an analysis of these sources and a review of the literature, the CNR has produced a typical profile (in terms of employment conditions and pay) of an RFT driver with a Slovenian contract working internationally.

### EMPLOYMENT CONDITIONS

Permanent contracts are the most widespread form of employment contract in the sector. New drivers are hired directly on permanent contracts with a trial period of between 1 and 3 months.

Slovenian drivers are entitled to 4 weeks of paid leave, i.e. the European minimum. Most say they take all of their paid leave.

According to information obtained during interviews with drivers, they work almost 231 days per year, slightly below what was observed in 2018 (233 days per year), driving between 93,200 km and 134,800 km, with a clustering around 116,000 km. In terms of the standard work schedule, Slovenian drivers tend to return to base twice a month. Upon returning to base, drivers usually spend 3-4 days at home. The average length of international trips is 10 days, which corresponds to long journeys made in Italy or Germany. Slovenian drivers say they frequently drive between Austria and southern Germany.

Since the drivers usually get paid a fixed salary, working hours are seldom recorded. Thus, working hours are often conflated with driving hours.

With an average of 1,810 hours of driving per year (according to CNR estimates), the Slovenian sector has the lowest volume of driving hours among the so-called "Eastern European" sectors; this figure is close to Western European standards. Due to the challenging terrain in the Slovenian sector's main markets (i.e., the need to cross the Alps in Slovenia, Italy and Austria), the average driving speed is lower than in the case of certain neighbouring sectors, and this seems to have an impact on the number of kilometres driven and driving time.

It should be noted that the decrease in driver hours is putting Slovenian companies in a difficult situation due to labour shortages and the Covid crisis.

Finally, based on interviews with companies, the driver/tractor ratio is 1.12.

#### NOTE ON DRIVING PERSONNEL COST FORMATION

##### *International driver pay*

The minimum monthly wage for a Slovenian driver was 940.58€ gross at the end of 2020; it was increased to 1,024.24€ in 2021. Most Slovenian companies say they pay their drivers 1,100€ gross, which is slightly above the minimum wage. Some companies, however, report that they pay their long-serving drivers a higher salary, i.e. approximately 1,250€ gross per month. This is not the norm, however.

According to interviews with people responsible for running haulage companies, the increase in the Slovenian minimum wage in early 2021 had no effect on the salaries of drivers, whose pay was already in excess of the new minimum wage. However, companies fear the effect of this increase will have on consumer prices, which could quickly put pressure on wages more generally.

When calculating a driver's annual pay, it should be remembered that Slovenian drivers receive a thirteenth month's pay, usually paid in July, as well as travel allowances and a number of other small bonuses. A portion of these travel allowances are paid as a matter of course by employers: an amount equivalent to 12 nights away from home at a rate of 40€ per day, i.e. 480€ per month. According to the interviews carried out on site, the actual amount of travel allowances is 855€ per month in the case of the typical driver profile used, i.e. 9 nights at 40€ per day and 9 further nights at a rate of 55€ per day.

In total, Slovenian drivers earn an average of approximately 1,630€ net per month, including bonuses and allowances.


## TYPICAL PROFILE OF A DRIVER WITH A SLOVENIAN CONTRACT WORKING INTERNATIONALLY AND BREAKDOWN OF THEIR COST

Standard profile of an international driver - Slovenia - 2020					
Characteristics		<ul style="list-style-type: none"> <li>- Driver working internationally for over 90% of his working time</li> <li>- Short and middle size international itineraries (mostly Italia, Austria, Germany)</li> <li>- Itineraries of 10 days in average</li> <li>- Paid holidays systematically taken, 2-3 weeks in summer, then about 10 days in winter</li> <li>- Income composed of a fixed salary slightly over the national minimum wage, completed by a variable part composed of travel allowances and holiday bonus in July</li> <li>- Regular income on monthly basis, disconnected from the real labor quantity. The hours of work are not counted and indicated on the pay slip.</li> <li>- Travel allowances usually reflect the reality and their amounts are respected. A minimum of 10 days of travel allowances are guaranteed by the employer, except for the summer holidays in July</li> <li>- Monthly working time often over 205 hours, decreasing compared to 2018 values</li> </ul>			
Annual mileage achieved		116,000 km			
Number of actual working days per year		231			
Number of working weeks per year		45			
Number of driving hours per year		1,810			
Cost breakdown of a standard Slovenian international driver in 2020					
Presentation of a standard pay slip					
EMPLOYER			EMPLOYEE		
<b>Gross Salary</b>	€/month	1,225.00 €	<b>Salaire Brut</b>	€/month	1,225.00 €
Fixed gross salary	€/month	1,100.00 €	Fixed gross salary	€/month	1,100.00 €
Other bonuses and extras on monthly basis	€/month	125.00 €	Other bonuses and extras on monthly basis	€/month	125.00 €
<b>Social contributions</b>	<b>16.10%</b>	<b>197.23 €</b>	<b>Social contributions</b>	<b>22.1%</b>	<b>270.73 €</b>
Old-age, Invalidity, Death Pensions	8.85%	108.41 €	Old-age, Invalidity, Death Pensions	15.5%	189.88 €
Health insurance, global rate	6.56%	80.36 €	Health insurance, global rate	6.36%	77.91 €
Unemployment	0.06%	0.74 €	Unemployment	0.14%	1.72 €
Accidents at work and occupational diseases	0.53%	6.49 €	Accidents at work and occupational diseases	0.00%	0.00 €
Parental protection	0.10%	1.23 €	Parental protection	0.10%	1.23 €
			<b>Salary after payment of social contributions</b>		<b>954.28 €</b>
			<b>Personal income tax after deductions</b>		<b>171.83 €</b>
<b>Monthly salary after payment of contributions</b>		<b>1422.23 €</b>	<b>Net salary after payment of social contributions and income tax</b>		<b>782.44 €</b>
<b>Travel allowance of a month of full service (11 months in a year)</b>		<b>855.00 €</b>	<b>Travel allowance of a month of full service (11 months in a year)</b>		<b>855.00 €</b>
<b>Monthly cost of a driver for a month of full activity</b>		<b>2277.23 €</b>	<b>Net income of a driver for a month of full activity</b>		<b>1637.44 €</b>
Breakdown of annual cost of a standard Slovenian driver in 2020					
Fixed gross salary + bonuses * 12 months		14,700.00 €	Fixed gross salary + bonuses * 12 months		14,700.00 €
Employer's social contributions * 12 months		2,366.70 €	Employee's contributions and income tax * 12 months		5,310.70 €
Salary cost after payment of contributions * 12 months		17,066.70 €	Net fixed income after income tax * 12 months		9,389.30 €
Travel allowances * 11 months		9,405.00 €	Travel allowances * 11 months		9,405.00 €
<b>Total annual cost</b>		<b>26,471.70 €</b>	<b>Annual net income</b>		<b>18,794.30 €</b>
<b>Cost of one hour of driving in €</b>		<b>14.63 €</b>	<b>Average monthly net income</b>		<b>1,566.19 €</b>
<b>Cost per kilometre in €</b>		<b>0.23 €</b>			

Source : CNR European studies

Since the last CNR study on the Slovenian RFT sector, driver costs have increased by 7.4% following the increase in the national minimum wage, notwithstanding the reduction in mileage and number of working days. Drivers' net earnings have stagnated due to the fall in productivity, resulting in fewer days spent abroad and reduced entitlement to travel allowances. Overall, the cost of an hour of driving increased from 13.12€ to 14.63€ over the same period, an increase of 12%.

## 2.3. OVERVIEW OF THE OPERATING CONDITIONS AND COSTS OF A “TYPICAL” INTERNATIONAL HGV

Operating conditions and costs for a 40-tonne HGV operated on long distance international routes, 2020 values 		
	unit	Slovenia <i>Simulation</i>
Yearly mileage of a vehicle	km	129,300
Number of operating days	days/year	257
Semitrailer/tractor ratio		1.20
Cost of one driver	€/year	26,471
Driver/tractor ratio		1.12
Yearly cost of vehicle financing and possession	€/year	14,725
Average consumption per 100 km	litres	29.2
unit fuel price, 2020 average	€/litre	0.8235 €
Yearly fuel cost	€/year	31,092
Maintenance-repair	€/year	5,450
Tyres	€/year	4,400
Tolls and vignettes	€/year	20,700
Insurance (vehicle)	€/year	3,450
Axle tax and other vehicle taxes	€/year	0
<b>Synthesis - cost price (excluding overhead costs)</b>	<b>€/year</b>	<b>109,337</b>
Cost/mileage ratio per annum	€/km	0.85
Overhead costs	€/year	12,149
<b>Synthesis - complete cost price</b>	<b>€/year</b>	<b>121,485</b>
Complete cost per kilometer	€/km	0.94

Source : CNR European studies

According to CNR calculations, the cost per kilometre of a Slovenian 40-tonne heavy goods vehicle used for international long-distance transport, excluding fixed costs, is 0.85€ (as opposed to 0.81€ in 2018), an increase of 5% compared with the last study. This increase is largely due to a significant increase in driver costs and tolls, while the cost of fuel fell 2020 due to the Covid crisis. Vehicle mileage has remained stable thanks to an increase in the driver/tractor ratio.

In conclusion, when fixed costs (estimated at approximately 10% of the total costs) are factored in, total costs amounted to €0.94 per kilometre in 2020, under the same conditions as those prevailing at the beginning of 2021.

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