

Slovenia's Sustainable Smart Specialisation Strategy After a Decade of Experience

Peter Medica

Swedish-Slovenian exchange on regional
development, innovation and smart specialization

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The Slovenian specialisation paradox

2.1m

people

€71.2bn

GDP in 2025

78%

exports of goods and services
/ GDP

18.7%

manufacturing share of value
added

86%

productivity level relative to
the EU

Small domestic scale creates pressure to internationalise.

A broad industrial base produces many capabilities, but often in relatively small niches.

High employment and demographic constraints make productivity and innovation the central convergence challenge.

How do you specialise when diversification itself is part of the competitive advantage?

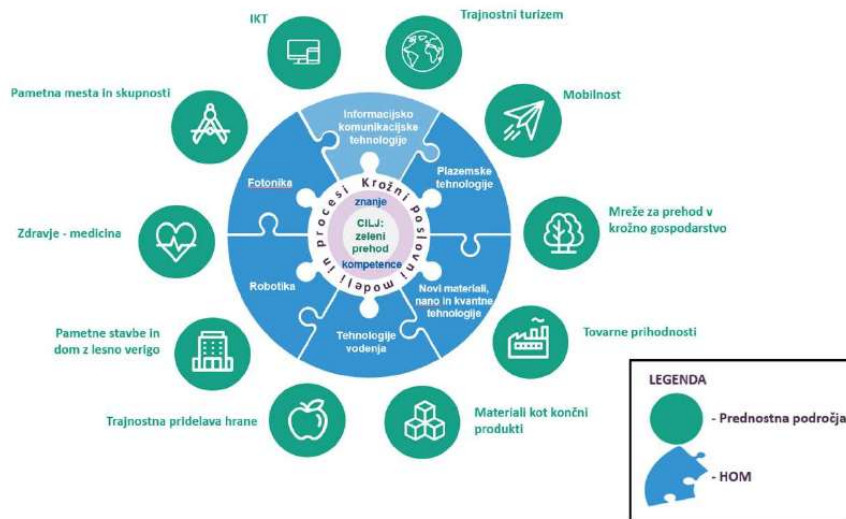
Smart specialisation became an organising principle



The list of priorities matters. The institutional capacity to combine them matters more.

One national framework, three levels of discovery

Slika 2: Ustroj S5



Vir: SVRK

10 priority areas

Stable capability domains that cover the full economy and society

Focus areas

More selective technological and market directions

Product directions

Concrete niches, solutions and emerging opportunities

EDP continuously tests and renews the detail

The lasting achievement is ecosystem infrastructure

2016

SRIPs created a persistent platform while cluster infrastructure remained weak



Successful ecosystem-building, but unfinished institutionalisation

A broad instrument base, with uneven effects

20

assessed calls

€746m

total project value

€379m

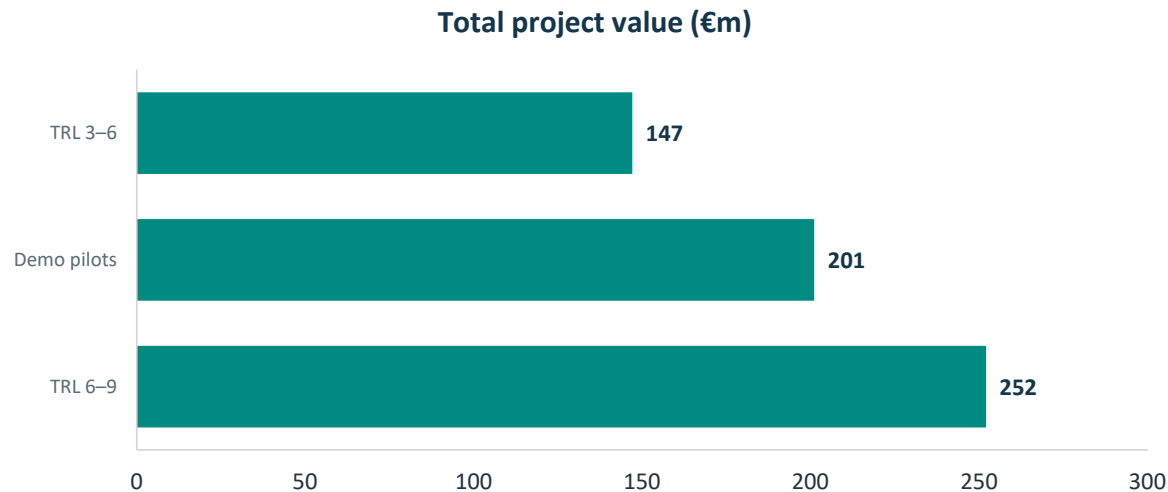
eligible co-financing

10,194

recipients

7,984

voucher recipients



What the evaluation suggests

- Export effects were often stronger than productivity effects
- Demo-pilot and start-up measures showed promising but heterogeneous results
- Combining measures can matter

After ten years, the evidence is granular enough

137,378

RDI documents

7,727

unique organisations

2014–mid-2024

observation period

Publications

Patents

Horizon

Cohesion

Interreg

All ten priority areas show substantial RDI activity.

There is no empirically obvious point where several areas can simply be cut away.

Evidence narrows the question from 'what exists?' to 'what type of capability is this?'

Critical mass and relative specialisation tell different stories

Area	Publications	Patents	Horizon projects
Circular economy	1.30	1.44	2.22
Smart buildings / wood	1.61	1.76	3.31
Sustainable food	1.07	1.87	2.00
Smart cities	1.21	1.20	2.13
Factories of the Future	1.06	0.82	1.59
ICT	0.97	0.82	1.64

Index > 1 means above-benchmark specialisation.

Large critical mass

ICT
Health
Factories of the Future

Distinctive relative specialisation

Circular economy
Sustainable food
Smart buildings / wood

Do not choose priorities on a single indicator.

Not all priorities are the same type of policy object

Deep tech and S&T foundations

Knowledge and technology bases with long time horizons

Advanced materials and manufacturing
Green tech, energy and environment
Biomedicine and biotech

Transformation drivers

Capabilities that change performance across many sectors

Digitalisation
Sustainability
Circularity

Sectoral innovation clusters

Application ecosystems linked to markets and value chains

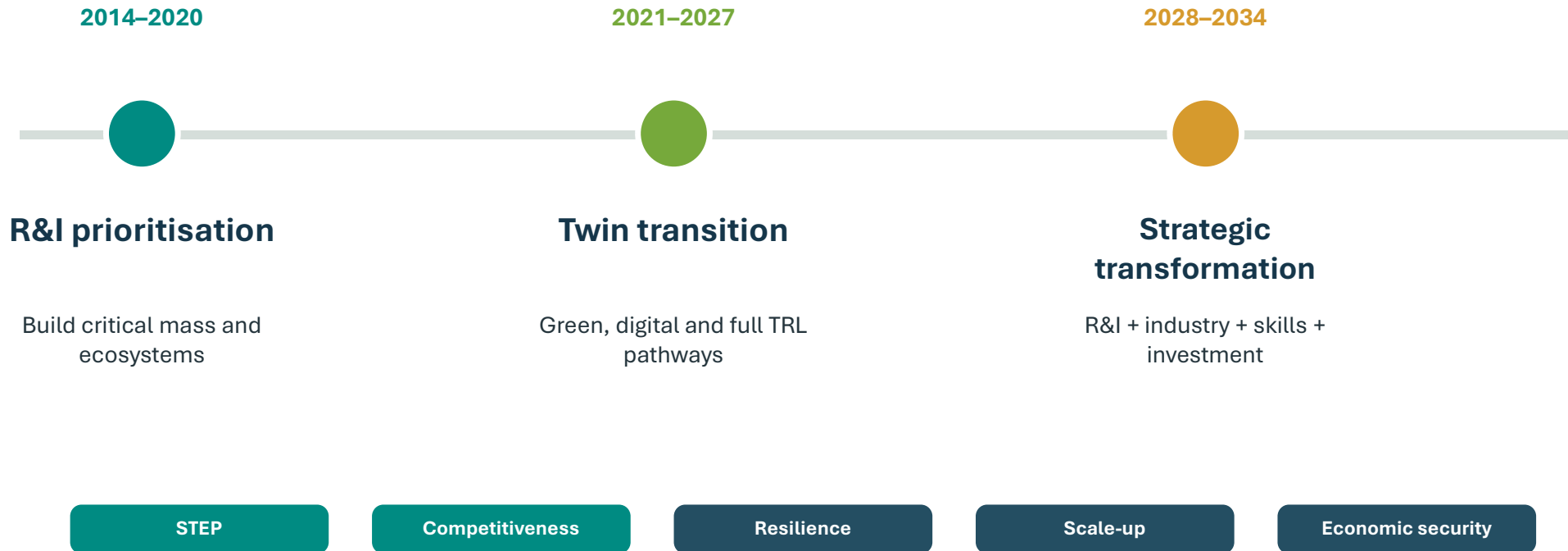
Agrifood, built environment, mobility
Advanced industry and ICT sectors
Health and tourism

Different capability types require different policy mixes

Capability type	Main bottleneck	Most relevant instruments
Deep tech / foundations	Long horizons, infrastructure, talent, transfer	Research infrastructure; long-term R&D; Horizon and STEP; deep-tech entrepreneurship; science-push transfer
Transformation drivers	Diffusion and adoption across domains	Cross-priority missions; skills; innovative procurement; regulatory sandboxes; evaluation across other areas
Sectoral clusters	Coordination, scale and market access	EDP; industry collaboration; market-pull transfer; large R&D and demonstration; exports and value chains

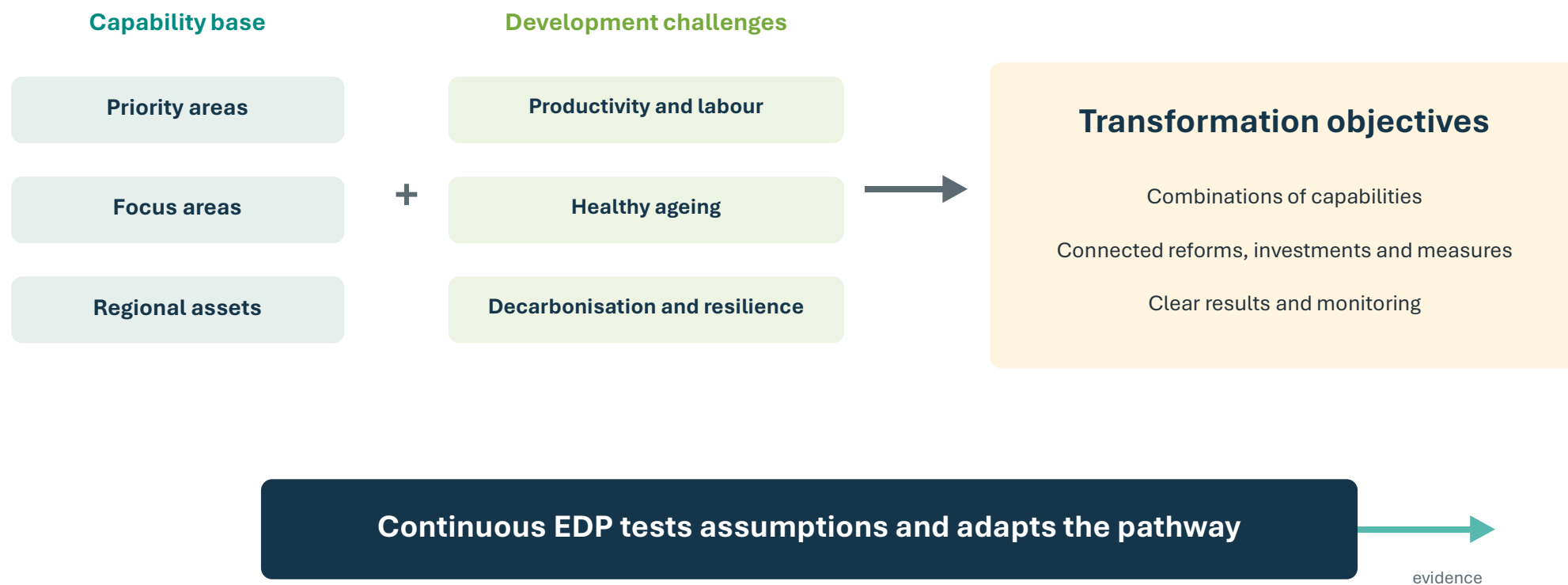
The strategic unit is the intervention logic, not the individual call.

Stable capabilities can support changing directionality



The question is not whether capabilities change every seven years, but whether they are directed towards new European and national objectives.

The next EDP cycle starts with transformation challenges



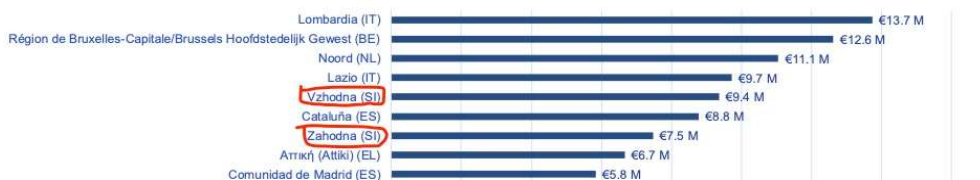
Development specialisation of regions reveals finer-grained capabilities



Not 12 separate S3s: one national framework that discovers and connects smaller innovation pockets

Mature ecosystems connect to European value chains

Grants distribution in all regions - Top 20
2021 – 2025, all Strands



€16.9m

combined allocation to Slovenia's two
NUTS 2 regions

9,768

interregional linkages in I3

89.5%

of I3 linkages are cross-border

Grants distribution in LDRs - Top 20
2021 – 2025, all Strands



Both Slovenian regions
ranked among the top
seven allocations

Learn

Connect

Demonstrate

Commercialise

Scale-up

South Swedish strengths create several interfaces with Slovenia

Region	Priorities published on S3 Observatory	Strongest Slovenian interface
Jönköping	Smart industry; logistics and e-commerce; forest and wood; food; tourism	Factories of the Future; ICT; mobility; smart buildings and wood; food; tourism
Kronoberg	Machinery and services; forest, wood, furniture and design; IT and business services	Advanced manufacturing and materials; smart buildings and wood; ICT and digital services
Kalmar	Bioeconomy; forest and wood; food; tourism; industrial and digital development; e-health	Circular economy; food; smart buildings and wood; health; tourism; advanced industry
Gotland	Tourism; food; business energy transition	Sustainable tourism; sustainable food; circularity, energy and clean technologies

Natural capital can be part of the competitiveness equation



Protecting and upgrading a natural asset can be an investment in the productive basis of a specialised domain.

S5+ is the next iteration of the Slovenian experiment



The next generation of smart specialisation will be judged less by the precision of its labels than by its ability to make specialised capabilities work together.

Thank you for your attention!

Peter Medica

peter.medica@gov.si
LinkedIn: petermedica