

Rail Transport: the impact of COVID-19 on transport volumes until the end of June

Passenger transport

International passenger traffic is still suspended in all WB6 region due to the closure of borders. At the national level, passenger traffic is slightly recovered due to lifting of imposed measures taken by national authorities.

Passenger traffic of all regional participants has been re-established, but not in full capacity. In June, number of passengers is between 20-50% lower compared to pre-Covid 19 time.

In North Macedonia domestic traffic is performed with low number of daily passengers. Kosovo* and Montenegro restarted passenger traffic from 18th May.

Bosnia and Hercegovina decided to start only with rail passenger trains on the entity level, from 12th May, however, there are still no trains between two entities.

For all services, specific protocols have also been activated for the sanitisation of facilities, workplaces and spaces dedicated to customer service, always in compliance with indications of the competent authorities.

All railway undertakings and infrastructure managers applied similar protection measures for passenger transport. These are:

- Passengers without masks are not allowed to enter the transport vehicle;
- If there is any person without mask, both the citizen and the company shall be punished (in accordance with the applicable provisions);
- Usag 50 % of the capacity of seats by respecting the distance;
- No more than one person is allowed in the area of two seats;
- Movement shall be done in accordance with the movement schedule;
- Disinfection of vehicles according to the instructions for disinfection;

One of the mayor problems during the break in passenger transport was implementation of the Public Service Obligation contracts. Taking into account that Railway Undertakings did not run the trains, the question was how the governments will treat it. Meanwhile, all passenger operators found common solution with their authorities. In other words, governments will pay them in accordance with contract even though they did not perform operation. This step should help them cover part of their loss in previous 4 months.

However, recovering of the passenger transport is slow. In Montenegro the number of passengers has reached 54% of the total number of passengers before pandemic.

Freight transport

During March and April, rail freight operations are performed at almost the same level as before the COVID-19 crises, but during the May, there is significant decrease of the transport volume compared to the same period last year (around 25%). In June declining trend has continued.

Second important thing for sustainability of the freight transport, in current conditions, is availability of the border crossings.

*This designation is without prejudice to positions on status and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

In the Western Balkans (WB6) there are seven BCPs with EU MS (open 24 hours) and five BCPs intra-WB6.

	HR	HU	RO	BG	GR	ALB	BIH	MK	KOS	MNE	SRB
Albania										Tuzi	
Bosnia and Herzegovina	1. B.Samac/S.Samac 2. Capljina/Metkovic										Brasina/Zvornik**
North Macedonia					Gevgelija/Idomeni				Hani Elezit/Blace		Tabanovci
Kosovo*								Hani Elezit/Blace			
Montenegro						Tuzi					Vrbnica/Bijelo Polje
Serbia	Sid/Tovarnik	Subotica	Vrsac	Dimitrovgrad/Kalotina			Brasina/Zvornik	Tabanovci		Vrbnica/Bijelo Polje	

Figure 1. The overview of the border crossings that are 24h open for the rail freight operation



Figure 2. Border crossings open 24 hours for rail freight operation

Availability of the border crossings is same as in previous report. All BCPs are opened 24h, and there is no significant difference compared to normal regime of operation. All border authorities (rail officials, customs, border police and different inspections), must respect imposed sanitary measures.

Within reported period (March-June) there was no major difference related to the waiting times at the borders compared to pre-COVID-19 period. It does not mean that railway undertakings and infrastructure managers, with support of the government authorities (custom, border police and inspection) should be satisfied with current figures about waiting times at the borders. There are different tools to decrease time at the borders like “one-stop-shop” based on bilateral agreement, infrastructure improvement (when there is not enough capacity within a station) as well as using ITS tools for informing and exchanging data in advance (before train’s arrival at the border). TC Secretariat is ready to facilitate all potential problems at the intra-WB borders as well as external with EU member states.

Freight traffic volume for the period January-June 2019 and for the same period 2020

RP	Tons		Net ton-kilometres (NTKM)	
	2019	2020	2019	2020
SER	4848140	4365020	1588600000	1293060400
ALB	48058	34717	9649741	3064659
MNE	534981	528979	37649166	38144563
MK	846008	802569	122026627	123401924
KOS	552673	533476	13797639	11227088
BIH	5462889	4383065	461214126	364704172
TOTAL	12292749	10647826	2232937299	1833602806

Figure 3. Freight transport in the WB region in the first half of 2019 and 2020

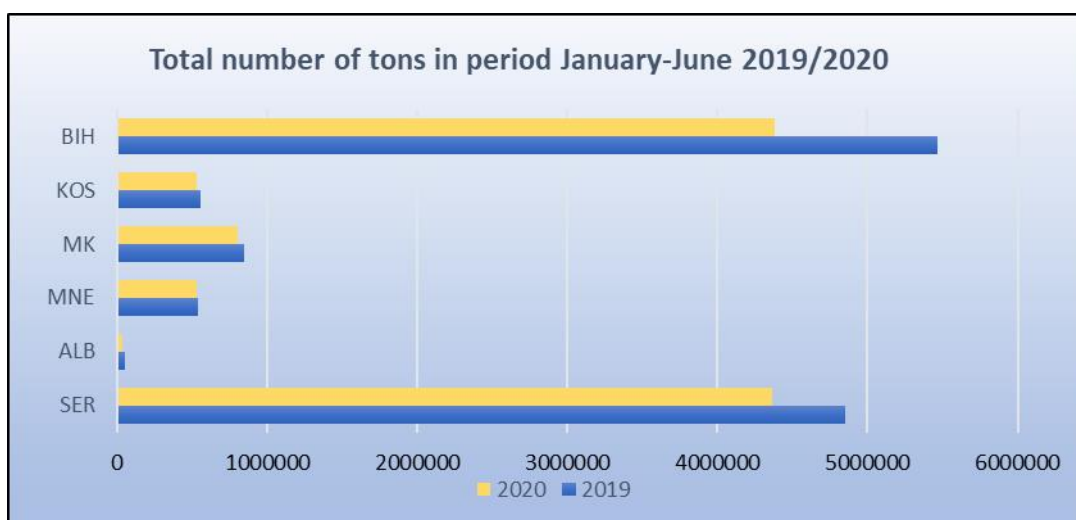


Figure 4. Freight transport in the WB region in tons in 2019 and 2020

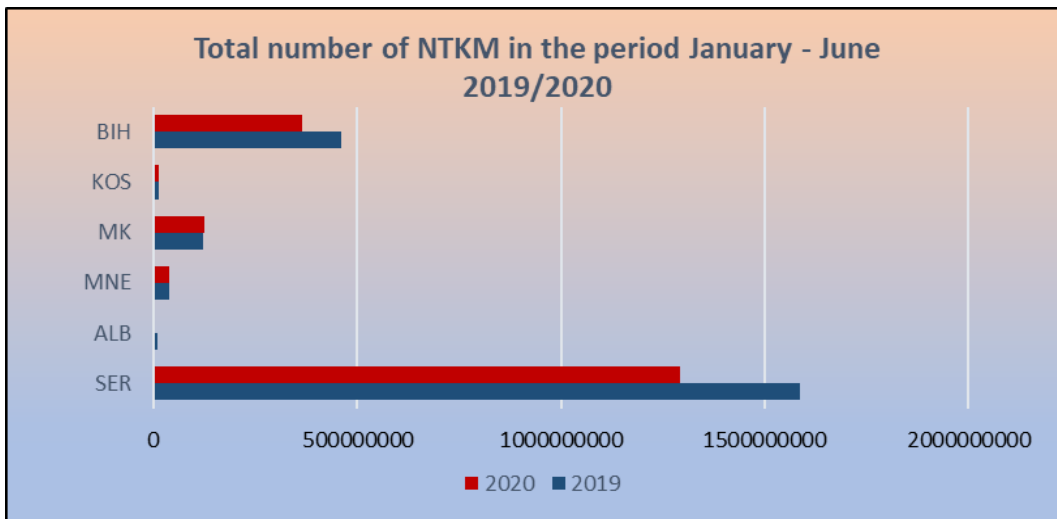


Figure 5. Freight transport in the WB region in Net ton-kilometres (NTKM) in 2019 and 2020

Rail freight has shown more resilience as mode of transport compared to the road, during the COVID 19. The first impression, looking at the figures (based on available data), is that there is no significant difference in freight operation when comparing the first **four** months of 2020 with same period in 2019. **However, during May and June there is significant decreasing (around 25%) of freight transport at the regional level.**

Based on cumulative figures for the first six months (whole region included) volume of freight transport is around 20% less than in 2019.

Overview of the transport figures per regional participant

Montenegro

International passenger traffic has not yet started working. Local passenger traffic started operating on May 18th and the number of passengers is gradually increasing. Revenues from rail passenger traffic in the first six months of 2020 are **54% lower** compared to last year.

BCP MNE-SRB (Bijelo Polje), as well as BCP in joint railway station Tuzi (MNE/ALB), are open 24h and fully operational.

Transport volume in June 2020 is 13% lower than the same month in 2019. Around 30% of the traffic is international (over two BCPs), while 70% is domestic transport (mainly trains with goods for export) from Niksic to Port of Bar.

Month	Tones	
	2019	2020
March	85023	112102
April	104927	74486
May	117496	85772
June	101000	88721

Figure 6. Freight transport in MNE for the period March – June 2019/2020

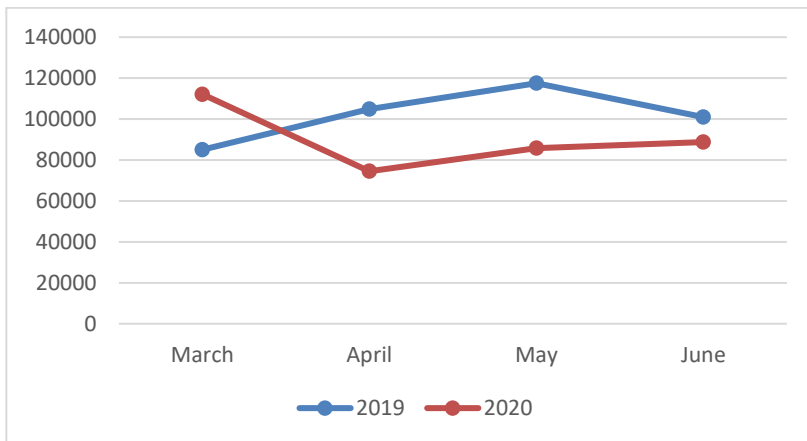


Figure 7: Transport volume in tons and during March - June 2019 and 2020

After increasing of the freight volume by 31,8 % in tons, and 16,8 % in NTKM and the number of freight trains has increased by 37,5% in March 2020, but there is decline about 35% in April, 27% in May and 13% in June 2020 compared to the same months in 2019.

Port of Bar

Unfortunately, the decline in rail freight transport and transshipment in the Port of Bar has continued in May. Montecargo transported 85,772 net tons in May, which is 27% less than in the same month last year.

73,797 tons were transhipped in the Port of Bar, which is 44% less than in May last year. The company Port of Adria had a higher transshipment of containers (4903) than last year in May by 19%, while in the transport of general cargo transshipment was 6128 tons and was lower by 43%.

In June 2020, 163,093 tons were transhipped in the Port of Bar, which is **25% less** than in June last year.

The company Port of Adria had a higher transshipment of containers (5459) than last year in June by **28%**, while in the transport of general cargo transshipment was not in June.

Serbia

Passenger intercity traffic has been re-established, in a reduced volume, on 4th May 2020, while the normalization in terms of the number of trains for all lines was 30% in May, than 70% in June. The exact list of trains for each line, as well as the timetable (available in Serbian language only), can be found on the [website of JSC 'Srbija Voz'](#). Urban and suburban traffic started operating since the morning of 8th May 2020.

International traffic with Hungary was performed for short in June, but now is suspended again.

The number of passengers as well as revenue is around 50% of numbers from the last year. Even though Passenger operator plan to involve almost all passenger trains, the capacity within a train is limited.

All necessary precaution measures have been taken and passengers in trains are obliged to wear a protective mask and gloves, to respect markings on/in trains (spot for entrance, moving around in the train and exiting) and respect social distancing, while trains are being disinfected. All seats in the train are marked, around 50% of seats are not available in aim to respect distance between passengers.

Transport of freight is functioning normally, all major BCPs are available and fully functional 24 hours. Still, railway traffic is closed on Mokra Gora, Sremska Raca (SER/BIH) and Bogojevo (SER/HR) border crossing stations which has minor impact on freight traffic.

By comparing data about the exchanged number of trains on borders crossing for January - June 2020 with the same months last year, it can be concluded that there was only a slight decline at Sid (SRB/HR), and Subotica (SRB/HU), while a slight rise was noticed at Dimitrovgrad (SRB/BG) and Presevo (SRB/MK).

Regarding the volumes on the whole network, the cargo activity of the railway undertakings is more or less at the same level compared to the first quarter of 2019.

The number of freight trains on border crossings, in the table below, shows the monthly number of trains exchanged on all border crossing in the period January - April 2020, compared to the same period in 2019. Data for May and June are not available yet.



Figure 8. Total number of trains on border crossings in Serbia

Month	Tons (000)		NTKM (mil)	
	2019	2020	2019	2020
January	891	760.2	224	185.8
February	841	828.7	186	209.4
March	886	747.2	211	197.1
April	888	765.4	217	194.3
May	899	764.1	214.4	177.8
June	800.2	769.3	195.5	183.4
Total	5206	4635	1249	1148

Figure 9. Transport volume in the first six months 2019 and 2020

Around 25% is domestic transport, while 75% is international (transit, export and import).

Total freight transport volume in first half of the 2020 is around 10% less than in same period 2019.

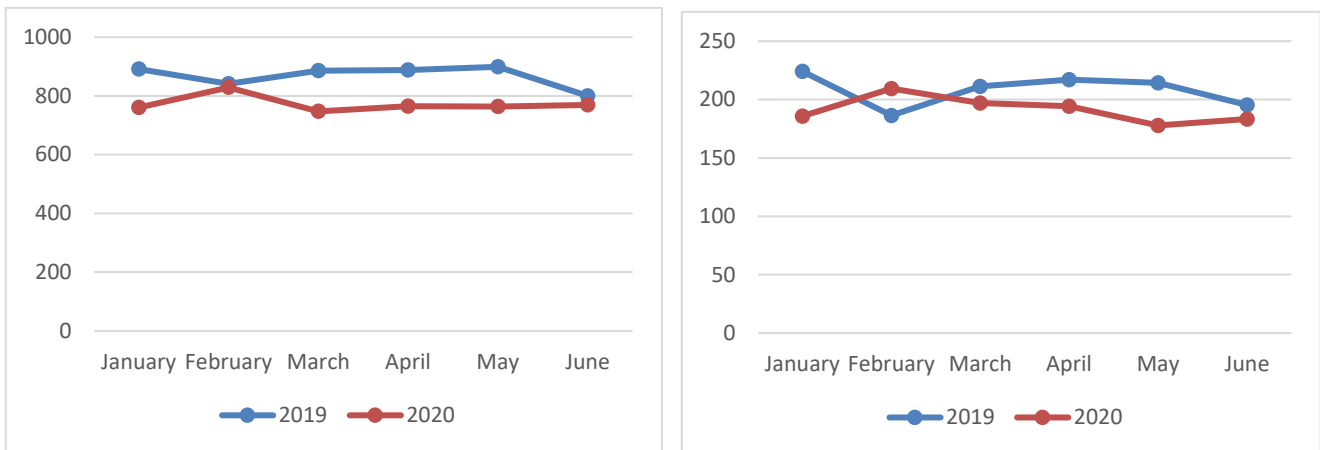


Figure 10. Transport volumes in Serbia in Tons (000) and NTKM (000000) in the first six months of 2019 and 2020

Kosovo

The re-establishing of the domestic passenger traffic done by 18th May, in reduced capacity and with full sanitation measures (social distance, gloves, masks, disinfection of vehicle etc).

Kosovo keeps border crossing Hani Elezit with North Macedonia open for international rail transport. Rail operations are performed regularly. In June 2020, there were **14 trains** exchanged with North Macedonia, which is significant decline compared to June 2019

No.	Transport data	June 2019	June 2020	2020 - 2019
1	Train kilometers of freight trains	7,721.40	3,142.50	-4,578.90
2	Gross tons of freight trains	277,796	97,550	-180,246
3	Gross tones kilometers of freight trains	5,868,623.90	2,397,853.10	-3,470,770.80
4	Net tons of freight trains	114,595	38,523	-76,072
5	Net tons kilometers of freight trains	2,499,897.80	1,024,127.60	-1,475,770.20
6	Number of trains in BCP with North Macedonia in entrance	29	7	-22
7	Number of trains in BCP with North Macedonia in exit	30	7	-23

Figure 11. Train kilometres, gross tones and net tons of freight for June 2019 and 2020

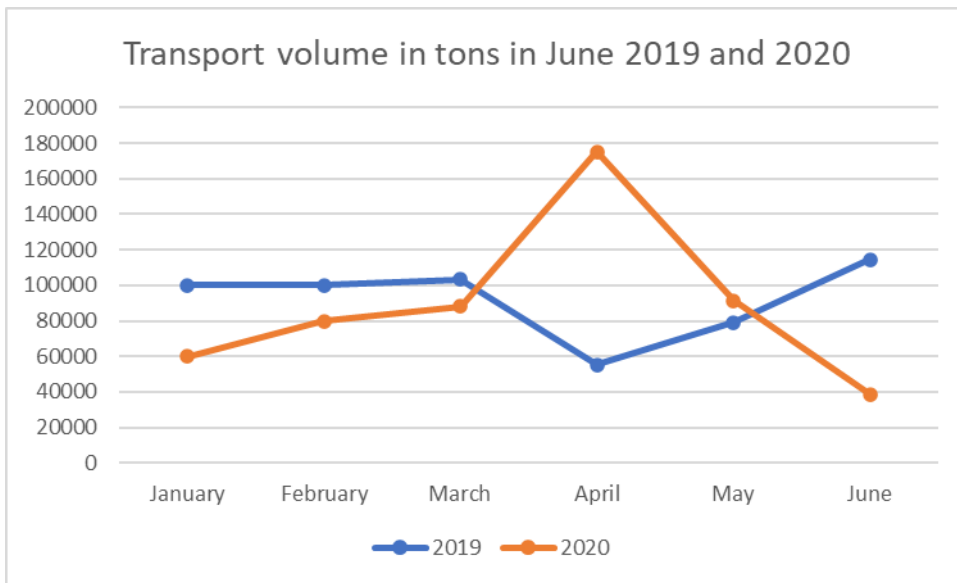


Figure 12. Freight transport in tons - January – June 2019 and 2020

Positive trend in freight transport was until April, but there is significant declining in May and June. However, the total volume of the freight transport is at the same level as in 2019.

North Macedonia

Passenger traffic is ongoing but not in full capacity. It depends on the assessment of the situation with the pandemic. Officially from 15.06.2020, “state of emergency” has been lifted, most of the measures are lifted, only recommendations from the health authorities should be respected, despite the fact that the number of infected people is still very high.

There are three BCPs open 24h with Kosovo*, Serbia and Greece.

Month	Wagons		Tones		NTKM (net tons km)	
	2019	2020	2019	2020	2019	2020
January	4811	6764	140520	183353	26398716	35118512
February	4558	5454	147205	153619	27562938	29499560
March	6522	5000	181047	150000	34202400	27000000
April	6200	4840	184687	164082	33862573	31783852
May	n/a	n/a	192549	151515	n/a	n/a
June	n/a	n/a	159889	131477	n/a	n/a
Total	22091	22058	1005897	934046	122026627	123401924

Figure 13. Transport figures for the period January - June 2019 and 2020

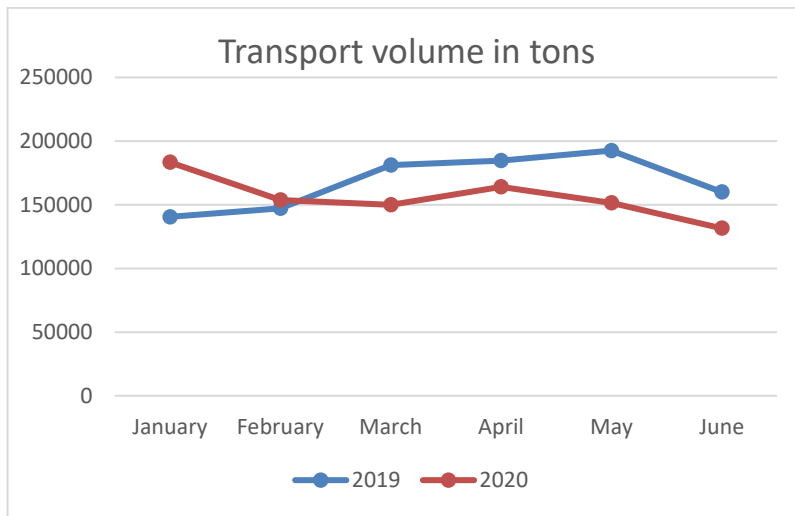


Figure 14 and 15. Transport volume in MK for the period January - May 2019 and 2020

Bosnia and Herzegovina

BIH has two opened BCPs with Croatia on Corridor Vc (Capljina/Metkovic and Slavonski Samac/Bosanski Samac) and one BCP with Serbia in joint rail station Brasina.

Like in other regional participants, international passenger traffic is on standstill, while freight is performed almost regularly.

BIH re-established domestic passenger traffic at the entity level, but not yet at the state level (inter-entity traffic).

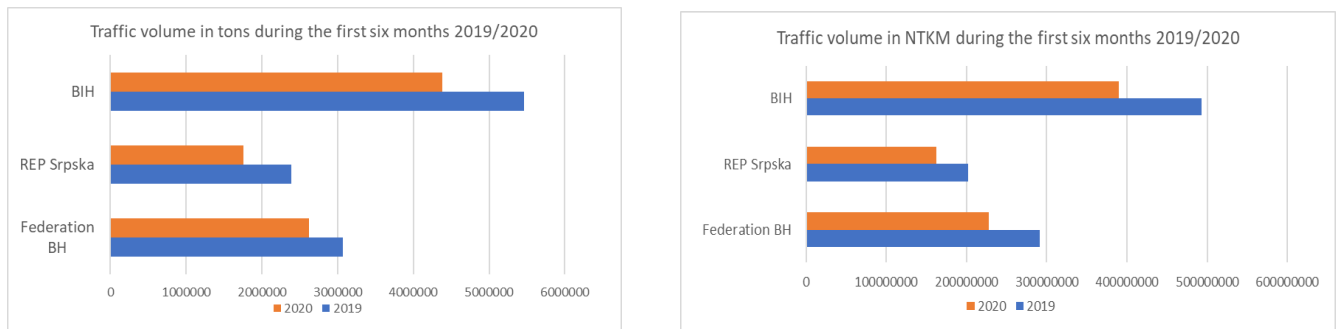


Figure 17 and 18: Transport volume in BIH for the period January - June 2019 and 2020

*Data for the Federation of BIH are not available for the May and June

	Tones		NTKM (net tons km)	
	2019	2020	2019	2020
Federation BH*	3072805	2622547	291157590	227558458
REP Srpska	2390084	1760570	202231775	161985581
BIH	5462889	4383117	493389365	389544039

Figure 19. Transport figures for the period January - June 2019 and 2020

In both entities freight transport is less around **20%** in first half of 2020 compared to 2019.

Albania

The Albanian Railway in the period January-June 2019/2020 has performed the following freight:

	Tones		NTKM (net tons km)	
	2019	2020	2019	2020
January	6,118.06	4,394.71	1,248,544.15	408,708.01
February	5,994.62	10,562.98	1,264,247.47	859,755.59
March	9,552.54	5,622.50	1,733,234.62	491,670.00
April	9,767.21	4,660.73	1,965,832.11	423,247.90
May	8,197.16	3,826.44	1,649,827.56	355,858.92
June	8,427.97	5,649.66	1,788,055.53	525,418.40
total	48,057.56	34,717.02	9,649,741.44	3,064,658.82

Figure 20. Transport volume in Albania for the period January – June 2019 and 2020

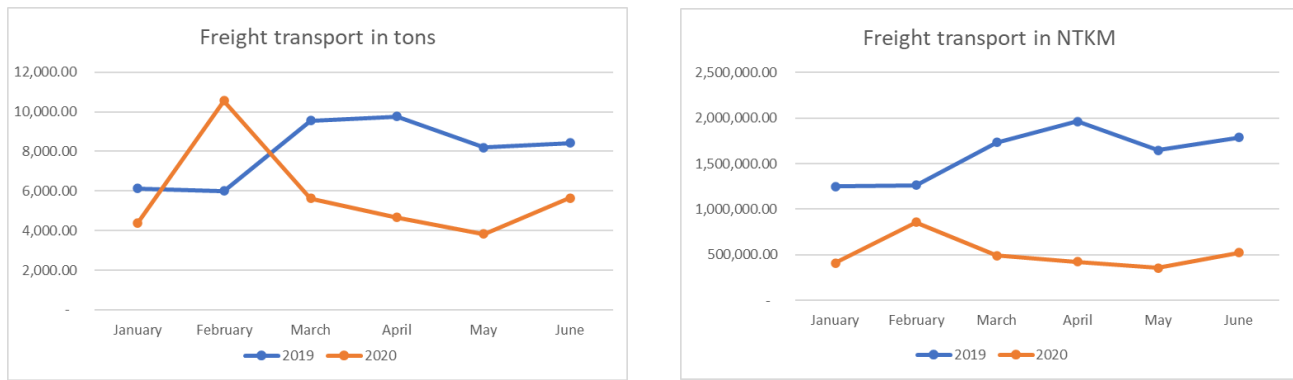


Figure 21. and 22. Transport volume in Albania for the period January – June 2019 and 2020

International freight shipping was performed through joint rail border station Tuzi.

There is significant declining of the freight transport, around 65% in NTKM, and 30% in tons.