

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

Passenger transport

International passenger traffic is still in slow regime in the entire WB6 region. At the national level, passenger traffic is slightly recovered due to lifting of imposed measures taken by national authorities.

Currently, there is just one international train in the Western Balkan between Belgrade and Podgorica (Bar).

Passenger transport has been slightly recovered during the period from June 2020 to June 2021. Average number of passengers in the entire region is around **50%** compared to the figures from the 2019.

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 in the region applied similar protection measures for passenger transport.

One of the mayor problems during the break in passenger transport was implementation of the Public Service Obligation contracts. Considering that Railway Undertakings did not run the trains, the question was how the governments will treat it? In meanwhile, all passenger operators found common solution with their authorities. In other words, governments decided to pay them in accordance with PSO contract even though they did not perform operation. This step should help them cover part of their loss in first few months of pandemic.

Freight transport

Very important thing for sustainability of the freight transport, in current conditions, is availability of the border crossings. There were no longer waiting times compare to period before pandemic.

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					Gevgelia/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	

*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.

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

All marked 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 (November 2020 – June 2021) 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

RP	Tons			Net ton-kilometres (NTKM)		
	2019	2020	2021	2019	2020	2021
SER	11157000	10483000	2803000	2696430000	2634305000	703000000
ALB	97101	70339	30032	9649741	3064659	2732952
MNE	971481	1158293	210298	100017970	106720252	
MK	1985889	1884160	460017	354914713	341498199	705734977
KOS	1026383	742302	491843	13994261	6243626	10478675
BIH	7429416	7729655	1302559	686687071	522746669	
TOTAL	22667269	22067748		3861693757	3614578404	

Figure 3. Freight transport in the WB region in 2019, 2020 and first four months of 2021

During reported period rail freight operations are performed at almost the same level as before the COVID-19 crises

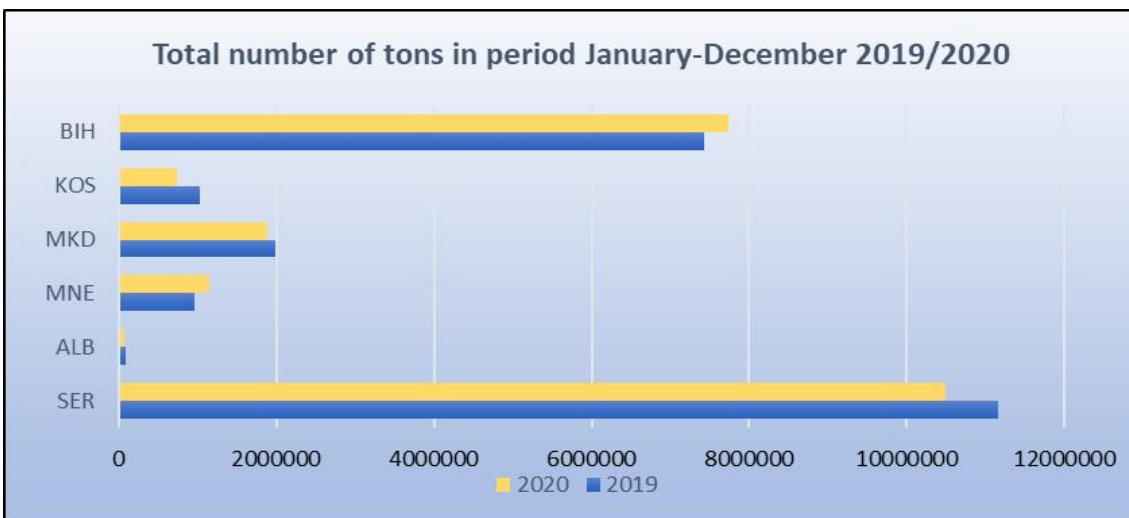


Figure 4. Freight transport in the WB region in tons in 2019 and 2020

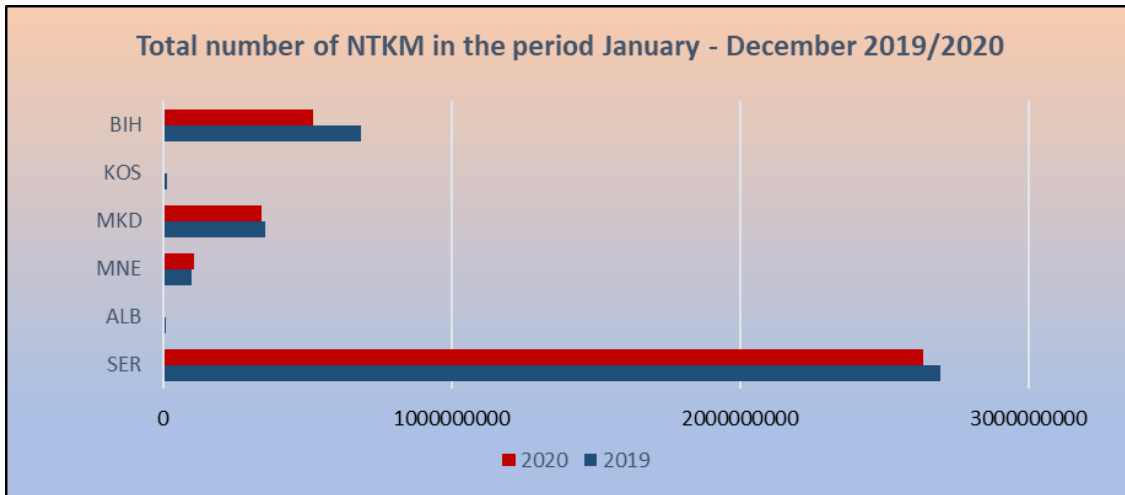


Figure 5. Freight transport in the WB region in Net ton-kilometres (NTKM) in 2019 and 2020

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 2020 with 2019. **However, during May, June and July 2020 there was significant decreasing (around 25%) of freight transport at the regional level and after that freight transport is slightly recovered**

Based on cumulative figures for 2019 and 2020 (whole region included) volume of freight transport is around 10% less than in 2019.

Overview of the transport figures per regional participant

Montenegro

International passenger traffic started on September 3, 2020 and the number of passengers is at a satisfactory level, taking into account all the restrictions. For now, there is only a night pair of trains on the route Bar-Belgrade-Bar as well as the day pair of trains.

Local passenger traffic started operating on May 18. Revenues are lower by more than 50%. In the last twelve months passenger transport is slightly recovered but no more than 50% from usual passenger flows.

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 2020 is on same level as it was 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	2021
January		85000	50023
February		95000	73502
March	85023	112102	65474
April	104927	74486	21299
May	117496	85772	
June	101000	88721	

July	81500	90357	
August	70000	106452	
September	90000	136826	
October	110000	93660	
November	85000	103509	
December		86408	
Total	844946	889567	

Figure 6. Freight transport in MNE for the period 2019/2020/2021

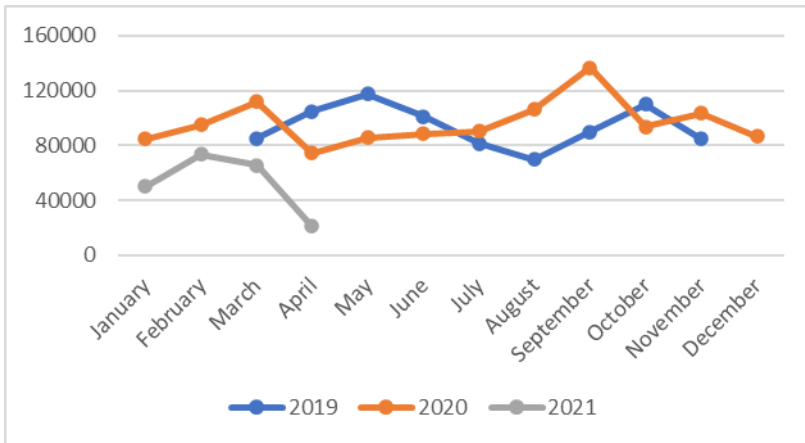


Figure 7: Transport volume in tons during 2019, 2020 and 2021

Overall freight volume was at the same level before and after the crises with periodically declining and increasing of volume.

The last four months in 2020 have positive trend in terms of freight transport. Overall, freight transport volume **is 5% higher** in 2020 compare 2019. There is declining in the first four months in 2021 for the more than 40%.

Port of Bar and Port of Adria

Overall transhipment in Port of Bar in the 2020 is 1.644.636 and it is higher 15% then in 2019.

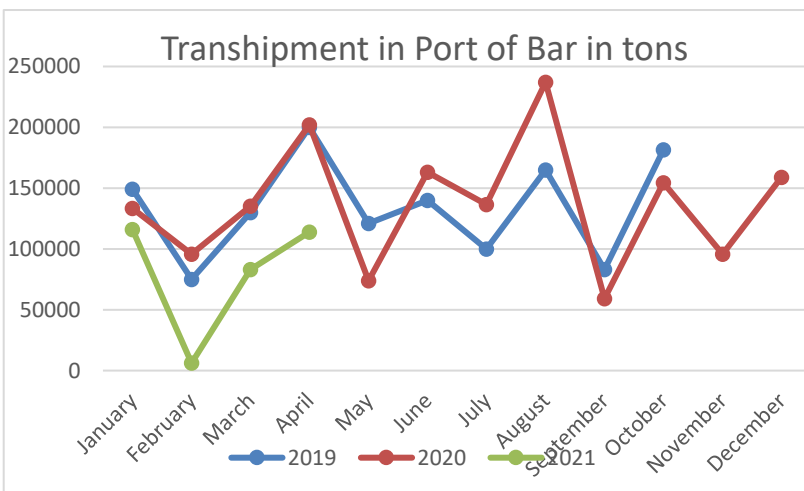


Figure 8. Transhipment in port of Bar in 2019 and 2020

Transshipment of containers in Port of Adria is 52.546 TU and it is higher 13% then in 2019.

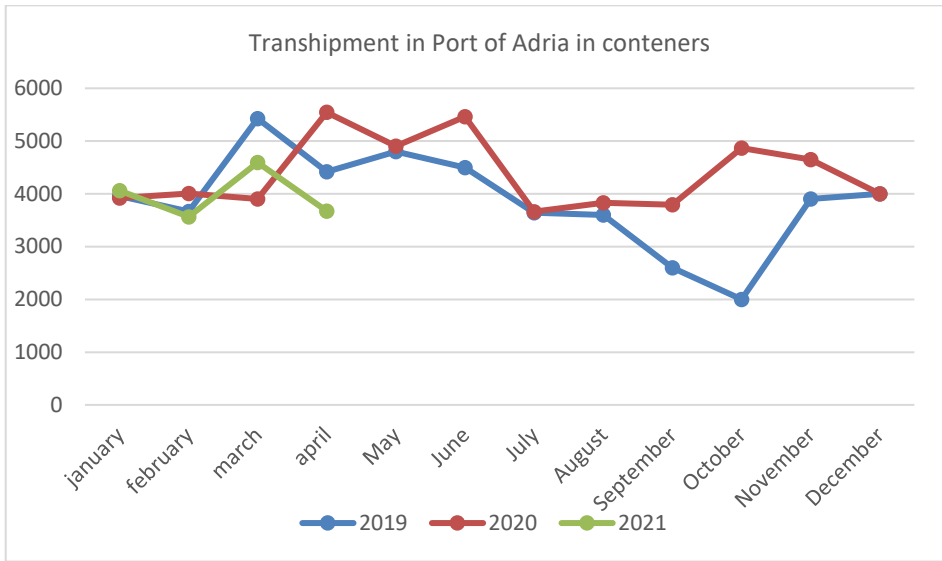


Figure 9. Transshipment in port of Adria 2019 and 2020

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, then 70% in June and almost 100% of trains during July 2020 (with exception some urban trains).

International traffic with Hungary was performed shortly in June 2020, but due to worsening of the pandemic, it is suspended again in July. Currently, there is one night and one daily pair of train with Montenegro.

When speaking about number of passengers, JSC 'Serbia Train' has carried between 205.000 and 290.000 passengers per month, in the period August 2020 – April 2021.

The number of passengers as well as revenue is around 50% of numbers from the 2019. Even though Passenger operator plan to involve almost all passenger trains, the capacity within a train is limited.

Transport of freight is functioning normally, all major BCPs are available and fully functional 24 hours.

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 same period of 2019.

Month	Tons (000)			NTKM (mil)		
	2019	2020	2021	2019	2020	2021
January	891	760	701.6	224	185.8	175.7
February	841	829	636.7	186	209.4	156
March	886	747	726.5	211	197.1	185.6
April	888	765	738.5	217	194.3	185.7
May	899	764		214.4	177.8	
June	800	769		195.5	183.4	
July	880	757		215.5	192.5	
August	792	732		201	188	
September	832	642		208	168	
October	914	778		219	208	
November	768	798		179	197	
December	750	774		180	189.4	
Total of public	10142	9116	2803	2451	2291	703
Public + private	11157	10483		2696.43	2634.305	

Figure 10. Transport volume in the 2019 and 2020

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

Total freight transport volume in reported period of the 2020 is around 8% less than in same period 2019.

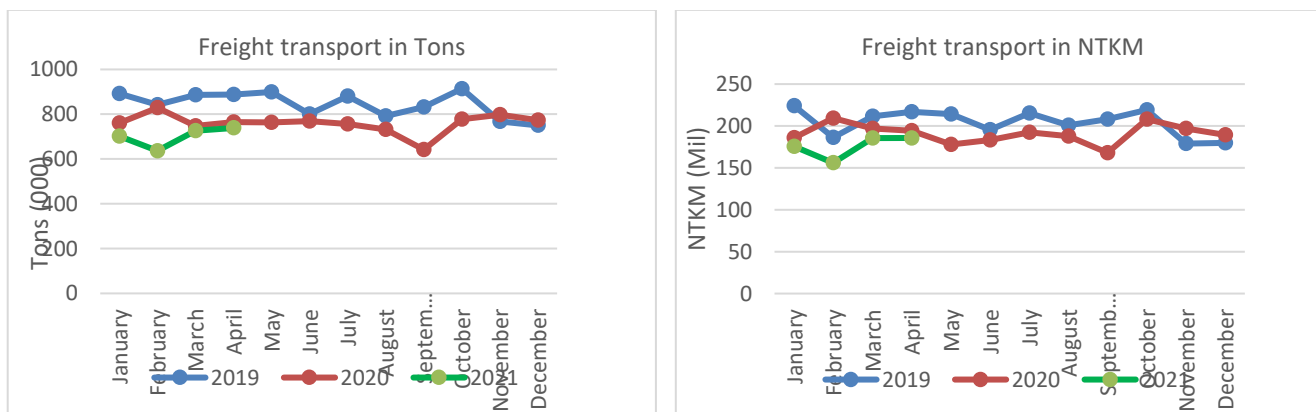


Figure 11. Transport volumes in Serbia in Tons (000) and NTKM (000000) in 2019 and 2020

Share of private railway undertakings is around 15%.

Kosovo

The re-establishing of the domestic passenger traffic done by 18th May of 2020, in reduced capacity and with full sanitation measures (social distance, gloves, masks, disinfection of vehicle etc).

Regarding the number of passengers, in previous period it was between 4000 and 6000 per month. It is approximately 40% of the total passenger transport before pandemic.

Kosovo keeps border crossing Hani Elezit with North Macedonia open for international rail freight but not for the passenger transport. Rail operations are performed regularly. In 2020, there is **significant decline of number of trains on exchanging with North Macedonia** compared to 2019.

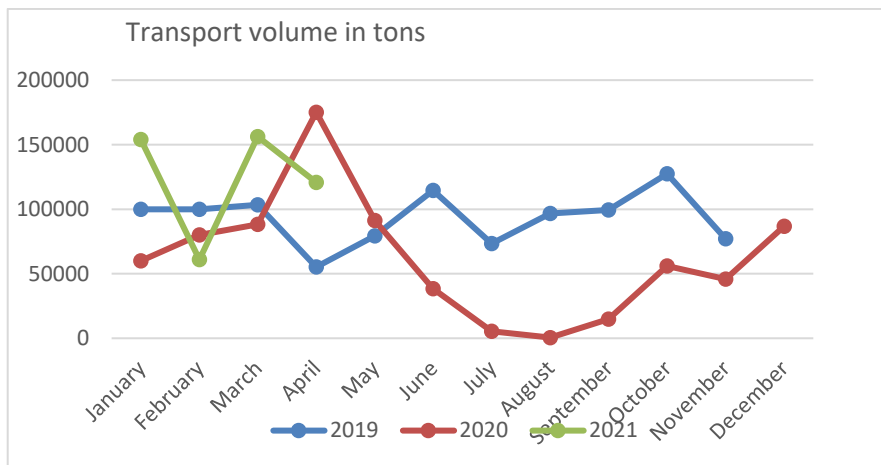


Figure 12. Freight transport in tons – 2019, 2020 and 2021

Positive trend in freight transport was until April 2020, but there is significant declining in the period May – November 2020. However, the total volume of the freight transport in 2020 is around **30%** less than 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, even though the number of infected people is still very high.

Number of passengers in 2020 is one half compared 2019.

passengers	2019	2020	2021
January	37,000	39,628	18433
February	42,731	31,349	20556
March	50,129	22,237	19632
April	49,601	3,059	17228
May	50,622	9,317	
June	46,054	15,433	
July	40,767	20,242	
August	38,805	21,803	
September	42,435	26,359	
October	52,354	25,327	

November	48,329	19,361	
December	47,611	18,943	
	546,438	253,058	75,849

Figure 13. Passenger Transport volume in 2019 and 2020

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

	Wagons		Tones		NTKM (net tons km)	
Month	2019	2020	2019	2020	2019	2020
January	140520	183353	150865	26398716	35118512	28246386
February	147205	153619	127270	27562938	29499560	23833538
March	181047	150000	181882	34202400	27000000	35098585
April	184687	164082		33862573	31783852	
May	192549	151515		33862573	31783852	
June	159889	131477		33862573	31783852	
July	160000	160000		33862573	31783852	
August	152656	158961		29786834	31019621	
September	169317	161982		34081802	31030566	
October	187841	155413		37078890	30148043	
November	155089	155270		30352841	30546487	
December	155089	158487		30352841	31288209	
Total	1985889	1884160	460017	385267554	372786408	87178509

Figure 14. Transport figures for the period 2019, 2020 and 2021

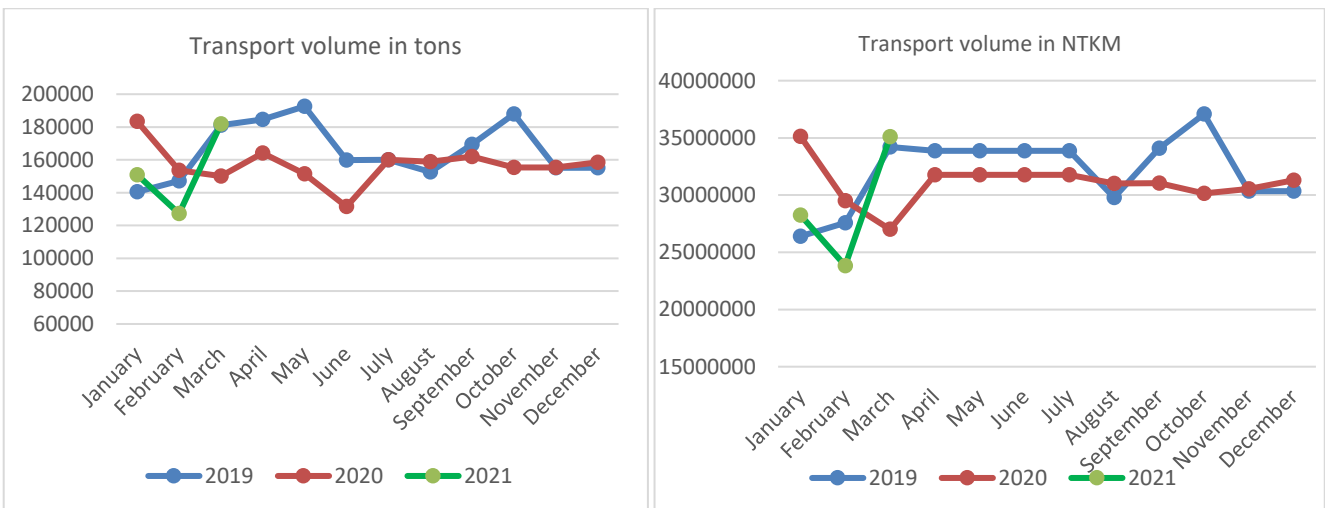


Figure 15 and 16. Transport volume in MK for the period 2019, 2020 and 2021

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).

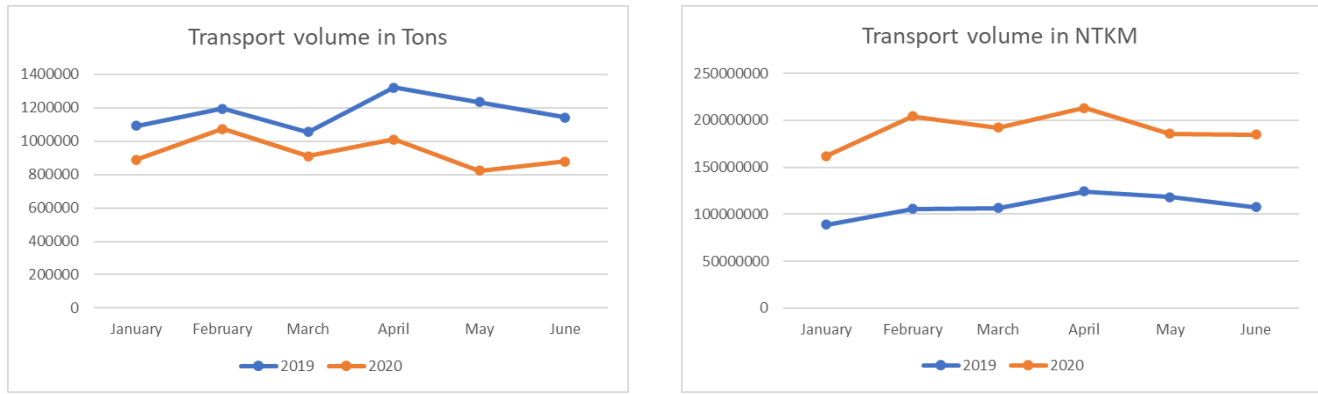


Figure 17 and 18: Transport volume in BIH for the 2019 and 2020

*Data for July – December is not available

	Tones		NTKM (net tons km)	
	2019	2020	2019	2020
BIH	2019	2020	2019	2020
January	1091093	889421	88878418	73179356
February	1192999	1073860	105764842	98518462
March	1054893	910131	106584959	85724986
April	1321369	1009021	124366589	88909341
May	1233330	822695	118163236	67430655
June	1142633	877911	107514094	77038190
total	7036317	5583039	651272138	490800990

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.

Note: Data from BIH are not completely available.

	Tones		NTKM (net tons km)	
	2019	2020	2019	2020
Federation BH	4646233	3822423	449040363	325356354
REP Srpska	2390084	1760570	202231775	161985581
BIH	7036317	5582993	651272138	490800990

Transport volume in entity of Republic of Srpska

	Tones			NTKM (net tons km)		
	2019	2020	2021	2019	2020	2021
REP SRPSKA						
January	291093	229421	222239	18878418	18179356	
February	392999	333860	321612	35764842	33518462	
March	443218	356994	408444	39625545	32184018	
April	460239	339611	350264	40168413	34891851	
May	425128	240158		35619318	21831082	
June	377407	260572		32175239	24839867	
July	393099	339160		35414933	35404734	
August	358382	350000			40000000	
September	352179	350000			35000000	
October	376448	350000			28000000	
November	374502	362664			30000000	
December	322872	394792			38000000	
total	4567566	3907232	1302559	237646708	371849370	

Figure 20: Transport volume in Rep Srpska for the 2019 and 2020

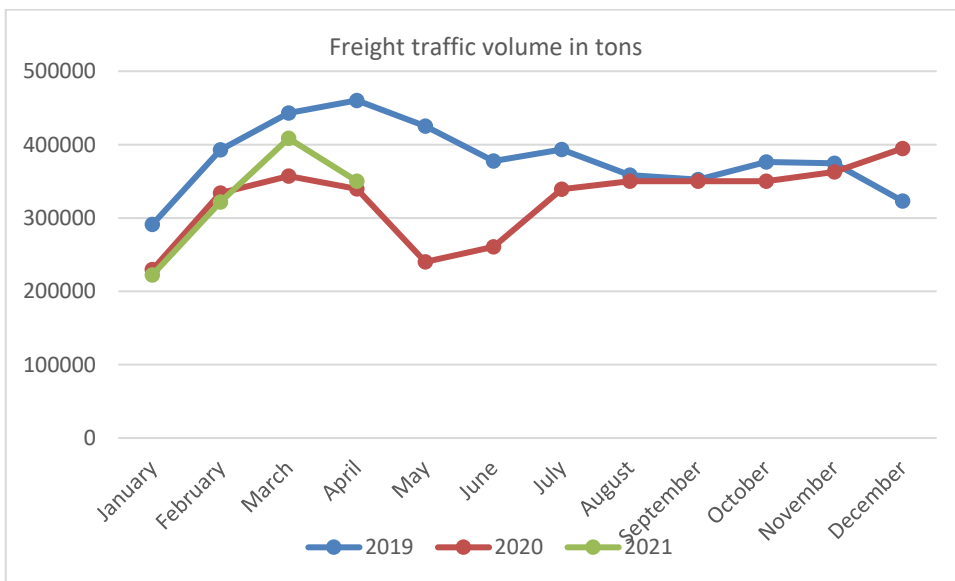


Figure 21: Transport volume in Rep Srpska for the 2019 and 2020

Note: Data for the Federation of BIH are not available for the period July 2020 – April 2021.

Albania

The Albanian Railway in the 2019/2020 has performed the following freight:

	Tones			NTKM (net tons km)		
	2019	2020	2021	2019	2020	2021
January	6,118.06	4,394.71	5,810.97	1,248,544.15	408,708.01	540,420.21
February	5,994.62	10,562.98	8,057.27	1,264,247.47	859,755.59	749,326.11
March	9,552.54	5,622.50	5,567.84	1,733,234.62	491,670.00	517,809.10
April	9,767.21	4,660.73	5,813.70	1,965,832.11	423,247.90	540,674.15
May	8,197.16	3,826.44	2,869.68	1,649,827.56	355,858.92	266,880.20
June	8,427.97	5,649.66	1,912.28	1,788,055.53	525,418.40	117,842.00
July	9,761.27	4,913.15		1,849,898.83	456,913.70	
August	10,750.25	5,714.27		2,083,502.86	531,427.10	
September	7,373.09	5,352.69		1,400,976.22	497,800.17	
October	10,839.10	6,552.48		2,097,705.00	609,380.64	
November	6,156.53	5,772.21		1,200,743.00	536,815.53	
December	4,162.79	7,316.72		376,939.52	680,454.96	
total	97,100.59	70,338.54	30,031.74	18,659,506.87	6,377,450.92	2,732,951.77

Figure 20. Transport volume in Albania for 2019 and 2020

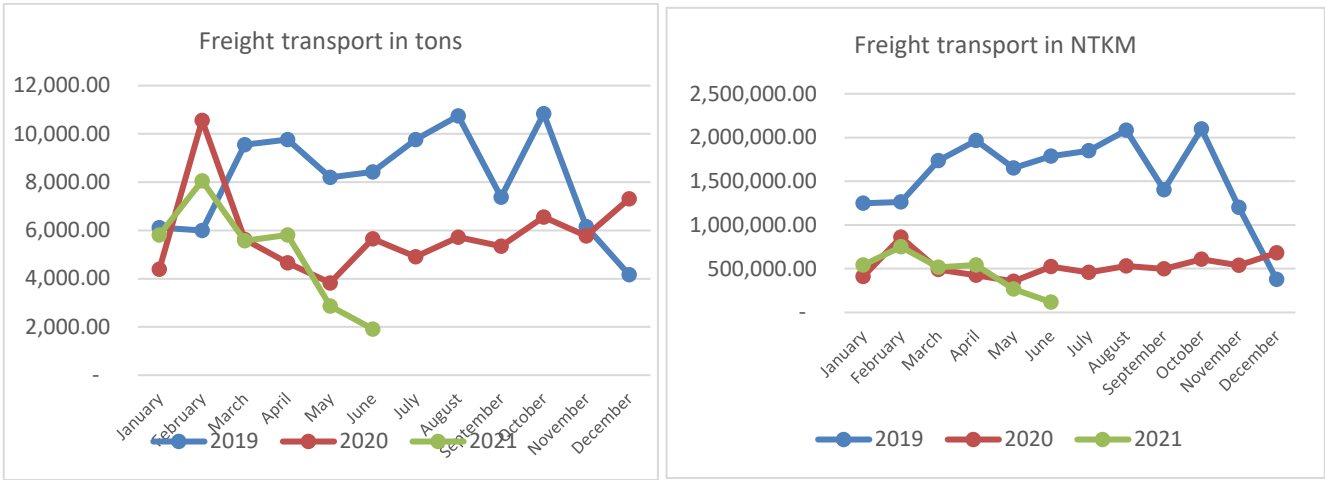


Figure 21. and 22. Transport volume in Albania for 2019, 2020 and 2021

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.