



Mobility Consultants

Assessment of the rail market in the Western Balkans in terms of capacities, policies, economic and technical level of development of freight and passenger transport segments

MC Mobility Consultants GmbH

Mariahilfer Straße 196/Top 18
A-1150 Wien
office@vienna-mc.com
www.vienna-mc.com



**15th Technical Committee
on Railway**

22.02.2023

Pristina



1. Project Background
2. Presentation of the Consultant's team
3. Task 1: Rail Market Monitoring Report for WB6
4. Task 2: Extending European Rail freight corridors to the West Balkans
5. Project Work schedule and planning of deliverables
6. Need for the support of the members of TC for Railways

1. Project Background

- Under the Treaty establishing the Transport Community, the South East European Parties have committed to ensure the **development of the indicative extension of the TEN-T comprehensive and core networks to the Western Balkans**, in view of their commitment to progressively integrate their transport markets with the European Union's, based on the relevant acquis.
- **The objective of this assignment is delivering a comprehensive overview of the transportation needs, traffic flows, and market situation on the Western Balkans** by assessment of the capacities, economic and technical level of development of freight and passenger transport in the region, and thus fulfilling the obligations derived from the Transport Community Treaty signed by South East European Parties, related to Annex 1 of the Treaty, the Rail Action Plan.

2. Presentation of the Consultant's team

✓ **Project start date: 17 October 2022**

✓ **Project end date: 24 July 2023**

✓ **Project team:**

- **Holger Eiletz**, Project Director
- **Tatjana Mirkovic**, Team Leader / EU Acquis
- **Gordan Stojic**, Rail Market Monitoring Expert
- **Klaus Uhl**, Rail Market Expert/EU Transport acquis
- **Frank Jost**, EU Transport acquis expert
- **Vassilis Evmolpidis**, Quality Assurance/Quality Control Expert
- **Andy Zhugli**, Local Expert Albania
- **Aleksandar Blagojevic**, Local Expert Bosnia and Herzegovina
- **Xhevat Ramosaj**, Local Expert Kosovo
- **Miroslav Kukavicic**, Local Expert Montenegro
- **Nikolce Nikoloski**, Local Expert North Macedonia
- **Sanjin Milinkovic**, Local Expert Serbia

3. Task 1: Rail Market Monitoring Report for WB6

Objective of the Task 1:

- Western Balkan Rail Market Monitoring

Main activities:

- Analysis of existing Rail Market Monitoring reports of EU countries according to Regulation (EU) 2015/1100
- Collecting and verification of data for WB6 RMMS report (base year 2021)
- WB6 RMMS report based on collected data

Ongoing activities:

- Collection and verification of data for Southeast European Parties RMMS report with a base year 2021, through meetings with IM, RUs

Final outcome:

- Western Balkan Rail Market Monitoring Report

4. Task 2: Extending European Rail freight corridors to the West Balkans



Objective: Update of the preliminary implementation plan of 2017 for a competitive rail freight network

Main activities:

- Update of the Inventory of RFC facilities
- Update of the RFC implementation plan in accordance with Regulation (EU) No 913/2010
- Update of technical parameters and charges for presentation of core corridor rail freight facilities

Ongoing activities:

- Market surveys through interviews with railway undertakings and intermodal operators, logistic service providers and shippers

Final outcome:

- Updated Rail freight corridor Implementation plan and its annexes and appendices on the basis of the handbook and the Regulation 913/2010/EU.

5. Project Work schedule and planning of deliverables

- ✓ Inception Report approved on 26 January 2023
- ✓ Data Collection Form (DCF) approved on 26 January 2023
- ✓ The dates of approval of IR and especially DTF influenced the start of the data collection, surveys/interviews
- ✓ Planning of the remaining deliverables:

Draft Reports/Deliverables	Month 7				Month 8				Month 9				Month 10			
	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40
	10.04.23	17.04.23	24.04.23	01.05.23	08.05.23	15.05.23	22.05.23	29.05.23	05.06.23	12.06.23	19.06.23	26.06.23	03.07.23	10.07.23	17.07.23	24.07.23
1. Inception Report with updated working methodology and timeline																
2 Structure and data collection form which will be used for collecting data created																
3 Data for 2021 as baseline year collected from all SEEPs					1.2			1.2								
4 Report and infographics on Western Balkan Rail Market Monitoring									1.3			1.3				
5 Draft Final Report for Task 2		2a														
6 Final report for Task 2						2b				2b						
7 Final Report (in draft and final form)												3				3
1	Deliverable - draft report															
1	Deliverable - final report															

6. Need for the support of the members of TC for Railways

- ✓ **To the best of our knowledge the following feasibility studies have been prepared or are in preparation by WBIF:**
 1. Albania: 2 recent studies completed and approved. One for Durrës-Montenegro (IPF7) and one for Durrës-Rroghozina (IPF8). From Rroghozina to NMK (Corridor VII) exists the study of IPF4.
 2. Serbia: 3 recent and ongoing studies. One for IPF9 for Belgrade to Sid- border with Croatia. Then PPF9 study for Nis-Belgrade and IPF8 study Nis-Presevo.
 3. Kosovo: 2 studies by IPF2 which are updated with new FS for the line north south from Serbia into Pristina and from Pristina to Nis. The new studies are probably done by IPF6 or IPF7, and possibly by EBRD (for the section from Ibar to Pristina which is under construction).
 4. NMK: The latest FS for Corridor VIII is by TYPASA and provides forecasts for the connection all along the line and especially from Skopje to Albania. But recently (one of IPFs) completed a study for the ERTMS. Maybe there is info there. I am sure the Ministry in Skopje can provide the data, from previous studies. In IPF4 study for Presevo-Tabanovce joint RW station there is info for the traffic forecast to/from Serbia and for transit traffic.
 5. MNE: We are not aware of FS. But there is a study by an IPF about the FS of the highway Bar-Boljare. Maybe there is info there for the railway, as competition.
 6. BIH: We are not aware of any recent study in WBIF.
- ✓ **We kindly ask your support to receive any other studies that you know about of which we are not informed.**

THANK YOU FOR YOUR ATTENTION!

office@vienna-mc.com