17th Technical Committee on Railway

Zagreb, 05-06.10.2023
1. Administrative matters
   - Adoption of the Agenda
   - Financial rules and procedure
   - New members of TC on Railways
2. Main activities of TCT
   - Calendar of TCT meetings - update
   - Joint activities with ERA
4. Revision of the TEN-T Network
6. Solidarity lanes – Development of the rail connections with Ukraine
Agenda

7. Assessment of the Rail Market at the Western Balkan
8. Railway Market monitoring – Croatia, Railway Regulatory Body
9. LCs, the next steps
10. ERA - Activities and challenges for the year to come and beyond focused on the WB – update
11. Improving climate resilience and adaptation measures in the indicative extension of TEN-T road and rail networks in the Western Balkans
12. Information about re-establishing passenger connections between capitals in the region
13. Transport Operation in the region
14. Conclusions
Administrative matters

- Adoption of the Agenda
- New members of TC on Railway
- Financial rules - novelties
Main activities of TCT

- TEN-T Report, Progress Report, TODIS, Rail Centre of Excellence, Passenger train Ljubljana – Zagreb Belgrade,
  Monitoring of the infrastructure

- DAC event, Belgrade, 14th September
- ERA training, 13th September, Belgrade
- Visibility event on Rail market Assessment Study – 13th September
- Rail live Madrid 29 November, 5th meeting of RIMN
- 17th Technical Committee on Railway

Joint activities with ERA
EVR trainings, ERTMS training, Driver license training
Rail Action Plan Progress

Rail Market Opening

- Albania: 44% (2022), 5% (2023)
- Bosnia and Herzegovina: 24% (2022), 73% (2023)
- Montenegro: 83% (2022), 0% (2023)
- North Macedonia: 50% (2022), 22% (2023)
- Serbia: 0% (2022), 92% (2023)

Passenger rights

- Serbia: Up to 2022: 67%, 2023: 33%
- North Macedonia: Up to 2022: 33%, 2023: 0%
- Montenegro: Up to 2022: 33%, 2023: 0%
- Kosovo: Up to 2022: 33%, 2023: 0%
- Bosnia and Herzegovina: Up to 2022: 33%, 2023: 7%
- Albania: Up to 2022: 33%, 2023: 0%
Rail Action Plan Progress

9 October 2023

Interoperability

<table>
<thead>
<tr>
<th>Country</th>
<th>Up to 2022</th>
<th>2023</th>
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<tbody>
<tr>
<td>Serbia</td>
<td>73%</td>
<td>7%</td>
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<tr>
<td>North Macedonia</td>
<td>53%</td>
<td>0%</td>
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<tr>
<td>Montenegro</td>
<td>60%</td>
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<td>Kosovo</td>
<td>53%</td>
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<tr>
<td>Bosnia and Herzegovina</td>
<td>33%</td>
<td>7%</td>
</tr>
<tr>
<td>Albania</td>
<td>33%</td>
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Modernisation of railway infrastructure

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<tr>
<th>Country</th>
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<tbody>
<tr>
<td>Serbia</td>
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<td>Bosnia and Herzegovina</td>
<td>67%</td>
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<td>Albania</td>
<td>67%</td>
<td>8%</td>
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Overall progress

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<th>Up to 2022</th>
<th>2023</th>
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<tr>
<td>Serbia</td>
<td>79%</td>
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<td>North Macedonia</td>
<td>51%</td>
<td>10%</td>
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<tr>
<td>Montenegro</td>
<td>63%</td>
<td>2%</td>
</tr>
<tr>
<td>Kosovo</td>
<td>59%</td>
<td>2%</td>
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<tr>
<td>Bosnia and Herzegovina</td>
<td>39%</td>
<td>7%</td>
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<tr>
<td>Albania</td>
<td>44%</td>
<td>2%</td>
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</table>

Rail Action Plan Progress

9 October 2023
Annex I of TCT Progress

- Albania: Not transposed 50%, Partially transposed 49%, Fully transposed 1%
- Bosnia and Herzegovina: Not transposed 87%, Partially transposed 9%, Fully transposed 4%
- North Macedonia: Not transposed 81%, Partially transposed 18%, Fully transposed 1%
- Kosovo: Not transposed 74%, Partially transposed 21%, Fully transposed 5%
- Montenegro: Not transposed 77%, Partially transposed 9%, Fully transposed 14%
- Serbia: Not transposed 55%, Partially transposed 6%, Fully transposed 38%
Revision of the TEN-T Network

DG MOVE – Aurimas Brazys
Status of TEN-T projects – update, TEN-T report

TCT Secretariat, Regional Partners, JASPERS
TEN-T Progress Report

Percentages of electrified and non-electrified lines 2022/2023

Axle load in tonnes/axle on Core and Comprehensive Network 2022/2023
TEN-T Progress Report

Design Speed 100 km/h and over 2022/2023

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<tr>
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<th>Core</th>
<th>Comprehensive</th>
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<td>2021</td>
<td>71.99%</td>
<td>60.69%</td>
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<tr>
<td>2022</td>
<td>79.57%</td>
<td>67.66%</td>
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<tr>
<td>2023</td>
<td>78.85%</td>
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<td>2021</td>
<td>28.01%</td>
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<tr>
<td>2022</td>
<td>20.43%</td>
<td>31.82%</td>
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<td>2023</td>
<td>21.16%</td>
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</table>

Operating Speed 100 km/h and over for 2022/2023

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<tr>
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<th>Core</th>
<th>Comprehensive</th>
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<tr>
<td>2021</td>
<td>85.45%</td>
<td>14.55%</td>
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<td>2022</td>
<td>86.42%</td>
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<td>2023</td>
<td>84.23%</td>
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<td>2021</td>
<td>87.21%</td>
<td>12.79%</td>
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<td>2022</td>
<td>87.62%</td>
<td>12.37%</td>
</tr>
<tr>
<td>2023</td>
<td>86.25%</td>
<td>13.75%</td>
</tr>
</tbody>
</table>
TEN-T Progress Report

Train length 2022/2023

- Core: min 740 m
- Comprehensive: less than 740 m

ERTMS deployment 2022/2023

- Core: compliant
- Comprehensive: non compliant
Solidarity lanes – Development of the rail connections with Ukraine
Coffee break
Assessment of the Rail Market at the Western Balkan

TCT Secretariat
RAILWAY NETWORK

Total length: 6,072.14 km
In 2021, there were no high-speed lines in operation in the South East European Parties (SEEPS) area. Since 2022, a new high-speed line has been in operation in Serbia from Belgrade to Novi Sad.

The average percentage of electrified lines is lower compared to EU-27 (56% - 2018):
- 38% Serbia
- 74% Bosnia and Herzegovina
- 90% Montenegro
- 0% Kosovo*
- 34% North Macedonia
- 0% Albania

Density of the network in the South East European Parties (SEEPS) is half of the EU average (2018)

No congested lines on the South East European Parties (SEEPS) network.

The average number of freight terminals: 11

Average distance between stations: 9.96 km

Total length of the network: 19 km

Development of public railway inhabitant is 6 times lower than the EU level (2018)

LAND MODAL SHARE

The passenger transport in the SEEPS is significantly lower than in EU-27 (inside data), while in freight transport it is about 2.8 times smaller than the level in EU-27 (outside data).

Utilisation of rail infrastructure for passenger and freight transport:
- 17% Cars
- 6% Rail
- 40% Tram and Metro
- 37% Buses and Coaches
- 77% Road
- 5% Inland water way
- 6% Railways

Average timetabled speed of freight services: 45 km/h.

RAIL SERVICES

90% of all train kilometres run are freight services.

Low participation of rail in the market, especially in passenger transport.

MODAL SPLIT

- South East European Parties (SEEPS)
- EU-27

Sample Footer Text
RAILWAY MARKET STUDY

RAILWAY NETWORK

Total length: 6,072,14 km
In 2021, there were no high-speed lines in operation in the South East European Parties (SEEPS) area.
Since 2022, a new high-speed line has been in operation in Serbia from Belgrade to Novi Sad.

Density per inhabitant is double that of the EU (2018)

The average tendency to travel by rail is significantly lower than in the EU-27.

Density of the network in the South East European Parties (SEEPS) is half of the EU average (2018)

The passenger transport in the SEEPS is significantly lower than in the EU-27 (inside data), while in freight transport it is about 2.8 times smaller than the level in EU-27 (outside data).

LAND MODAL SHARE

UTILISATION OF RS PASSENGER AND FREIGHT TRANSPORT

0.756

0.045

RAILWAY NETWORK

No congested lines on the SEEPS network.
The average percentage of electrified lines is lower compared to EU-27 (56% - 2018):

- 38% Serbia
- 74% Bosnia and Herzegovina
- 90% Montenegro
- 0% Kosovo*
- 0% Albania
- 34% North Macedonia

Total number of freight terminals: 11

Average distance between stations: 9.98 km

Average timetabled speed of freight services: 45 km/h.

No congested lines on the South East European parties (SEEPs) network.

The passenger transport in the SEEPs is significantly lower than in the EU-27 (inside data), while in freight transport it is about 2.8 times smaller than the level in EU-27 (outside data).

**MODAL SPLIT**

- 17% Cars
- 6% Rail
- 40% Tram and Metro
- 37% Busses and Coaches
- 77% Road
- 5% Inland water way
- 6% Rails

0.045

South East European Parties (SEEPs)

Low passenger especially

RAIL SERVICES

*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.*
Density per inhabitant is double that of the EU (2018)

No congested lines on the South East European Parties (SEEPs) network.

Density of the network in the South East European Parties (SEEPs) is half of the EU average (2018)

Public railway expenditure infrastructure per inhabitant is 6 times lower than the EU level (2018)

LAND MODAL SHARE

The average tendency to travel by rail is significantly lower than in the EU-27.

EU-27 900 km

South East European Parties (SEEPs) 19 km

The passenger transport in the SEEPs is significantly lower than in the EU-27 (inside data), while in freight transport it is about 2.8 times smaller than the level in EU-27 (outside data).

UTILISATION OF RAIL INFRASTRUCTURE FOR PASSENGER AND FREIGHT TRANSPORT

Freight services (m tonne-km per line-km)

2.17

Passenger services (m pax-km per line-km)

2.02

0.756

0.045

MODAL SPLIT

17% Cars

6% Rail

South East European Parties (SEEPs)

EU-27
The passenger transport in the SEEPs is significantly lower than in the EU-27 (inside data), while in freight transport it is about 2.8 times smaller than the level in EU-27 (outside data).

**MODAL SPLIT**

- 17% Cars
- 6% Rail
- 40% Tram and Metro
- 37% Busses and Coaches

**RAIL SERVICES**

- 77% Road
- 5% Inland water way
- 6% Rails

Low participation of rail in the market, especially in passenger transport.

Average timetabled speed of freight services: 45 km/h.

90% of all train kilometres run are freight services.
Number of active railway licences: 37

ACTIVE RAILWAY LICENCES PER SOUTH EAST EUROPEAN PARTIES (SEEPS)

North Macedonia: 1
Bosnia and Herzegovina: 2
Kosovo: 3
Albania: 4
Montenegro: 4
Serbia: 23

Closed railway market in Bosnia and Herzegovina and North Macedonia

Passenger services: 100%
Freight services: 81%

PUBLIC RAILWAY UNDERTAKING

Passenger services: 0%

PRIVATE RAILWAY UNDERTAKING

Freight services: 19%

RAILWAY UNDERTAKING RENENUES EUR PER TRAIN-KM

24.54
Railway undertakings

- **Public Railway Undertaking**
  - Freight services: 81%
  - Passenger services: 100%

- **Private Railway Undertaking**
  - Freight services: 19%
  - Passenger services: 0%

95% of the total railway passenger kilometres were performed under public service obligations.
95% of the total railway passenger kilometres were performed under public service obligations.

**RAILWAY UNDERTAKING RENENUES EUR PER TRAIN-KM**

- **South East European Parties (SEEPs) 2021**
  - Passenger services: 2.54 EUR
  - Freight services: 34.54 EUR

- **EU-27 2018**
  - Passenger services: 18.04 EUR
  - Freight services: 20.25 EUR
INFRASTRUCTURE CHARGING

Passenger services 29%

STRUCTURE OF INCOME FROM TRACK ACCESS CHARGES - TRANSPORTATION INFRASTRUCTURE (PLUS STATION CHARGES OR TERMINAL CHARGES)

Freight service 71%

TRACK ACCESS CHARGES FOR PASSENGER TRAINS*

Long-distance 1.74  eur/train-km

Suburban and regional 1.04  eur/train-km

TRACK ACCESS CHARGES FOR FREIGHT TRAINS

6000 gross tonnes 4.3  eur/train-km
STRUCTURE OF INCOME FROM TRACK ACCESS CHARGES - TACS
(PLUS STATION CHARGES OR TERMINAL CHARGES)

Freight services 71%

ASSSENGER TRAINS*

6000 gross tonnes
4.3 eur/train-km

TRACK ACCESS CHARGES FOR FREIGHT TRAINS*

1600 gross tonnes
2.73 eur/train-km

1000 gross tonnes
2.56 eur/train-km
**TOTAL INFRASTRUCTURE EXPENDITURE:**

331.7 mEUR or 38.4 kEUR/line-km is 3.7 times lower than the EU level (2018)

**INFRASTRUCTURE EXPENDITURE PER INHABITANT IN SOUTH EAST EUROPEAN PARTIES:**

EUR 14.6 vs EUR 87 (EU-27 – 2018)

**86% Public funds**  
(sourced directly from public investments grants)

**4% Own funds**  
(from revenue earned by infrastructure managers through access charges and by other means)

**10% EU funds**

Share of EU funds in rail infrastructure expenditure ranged from **0% to 35%**

**Maintenance**

95% of investment
INFRASTRUCTURE EXPENDITURE PER INHABITANT IN SOUTH EAST EUROPEAN PARTIES:

EUR 14.6 vs EUR 87 (EU-27 – 2018)

Share of EU funds in rail infrastructure expenditure ranged from 0% to 35%

95% of investments in new infrastructure were carried out in Serbia and 5% in North Macedonia
QUALITY OF RAIL SERVICES

Traveling by car being more than 50 times riskier than travelling by train

IN 2021 OVER 20 900 PEOPLE WERE EMPLOYED IN THE SOUTH EAST EUROPEAN PARTIES (SEEPS) RAILWAY SECTOR.

- 60% Staff employed by infrastructure managers (IMs).
- 40% Staff employed by railway undertakings (RUs).
- 5% are employed by private railway undertakings (RUs).
- Proportion of staff of main RUs older than 50 years – 54.8%
- Proportion of women in railway workforce – 16.5%
- Proportion of staff of main IMs older than 50 years – 48.4%

Sample Footer Text
Traveling by car being more than 50 times riskier than travelling by train.

In 2021 over 20900 people were employed by private railway undertakings (RUs). 5% are employed by private railway undertakings (RUs).
Traveling by car being more than 50 times riskier than travelling by train.

In 2021 over 20,900 people were employed in the South East European Parties (SEEPS) railway sector.

- 51% Staff employed by infrastructure managers (IMs).
- 40% Staff employed by railway undertakings (RUs).
- 23% are employed by private railway undertakings (RUs).
- 26%
Punctuality - a big problem in the South East European Parties (SEEPs): 43% of services classified as punctual. In Kosovo, every passenger train was delayed for more than 5 minutes.

Canceled services:
The percentage of cancelled passenger trains in the South East European Parties (SEEPs) ranges between 2% and 26%; South East European Parties (SEEPs) average is 6% (EU-27: 1%).
Proportion of staff of main RUs older than 50 years – **54.8%**

Proportion of staff of main IMs older than 50 years – **48.4%**

Proportion of women in railway workforce – **16.5%**

Canceled services:
The percentage of cancelled passenger trains in the South East European Parties (SEEPs) ranges between **2%** and **26%**; South East European Parties (SEEPs) average is **6%** (EU-27: **1%**).
A set of 13 recommendations has been drafted from the results of the study. The recommendations are divided into: Recommendations coming from the market. Recommendations coming from the regulatory side.

With each recommendation, information is given on the time horizon and responsibility:

Short-term: implementation should start in 2024 for a positive effect until 2026.

Medium-term: implementation should start in 2024 for a positive effect until 2028.

Responsible parties for the implementation.

Their implementation contributes to reversing the decline of rail freight.
## Short-and medium-term infrastructure measures

<table>
<thead>
<tr>
<th>Country</th>
<th>Initiative</th>
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<tbody>
<tr>
<td>Albania</td>
<td>Railway bridge over Ishem River, rail access to new terminal in Porto Romano</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>Increase in train speed, decrease border crossing time, access to Port Terminal Brcko</td>
</tr>
<tr>
<td>Kosovo</td>
<td>Miradi Terminal, reopening of Route 10 Mitrovica – Lesak – Kraljevo for international traffic</td>
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<tr>
<td>Montenegro</td>
<td>Port of Bar rail infrastructure</td>
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<tr>
<td>North Macedonia</td>
<td>Modernisation of Skopje Terminal</td>
</tr>
<tr>
<td>Serbia</td>
<td>Encourage more private terminal operators to invest in last mile</td>
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</tbody>
</table>
Railway Market monitoring – Croatia, Railway Regulatory Body

HAKOM - Croatia – Marina Matic, Nenad Zonjic
Level Crossing Campaign – Summary

Explanation of next steps

ONE CARELESS MOMENT IS ALL IT TAKES...
IT'S A THIN LINE
ERA - Activities and challenges for the year to come and beyond focused on the WB – update September 2023
Lunch break
Improving climate resilience and adaptation measures in the indicative extension of TEN-T road and rail networks in the Western Balkans

Ivana Stevanovic, Aleksandar Bajovic
Information about re-establishing passenger connections between capitals in the region
Concluding remarks