



# 17<sup>th</sup> Technical Committee on Railway

Zagreb, 05-06.10.2023

# Agenda



- 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
- 3. Implementation of the Rail Action Plan – Progress Report 2022-2023**
- 4. Revision of the TEN-T Network**
- 5. Status of TEN-T projects – update, TEN-T report**
- 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, 14<sup>th</sup> September
- ERA training, 13<sup>th</sup> September, Belgrade
- Visibility event on Rail market Assessment Study – 13<sup>th</sup> September
- Rail live Madrid 29 November, 5<sup>th</sup> meeting of RIMN
- 17<sup>th</sup> Technical Committee on Railway



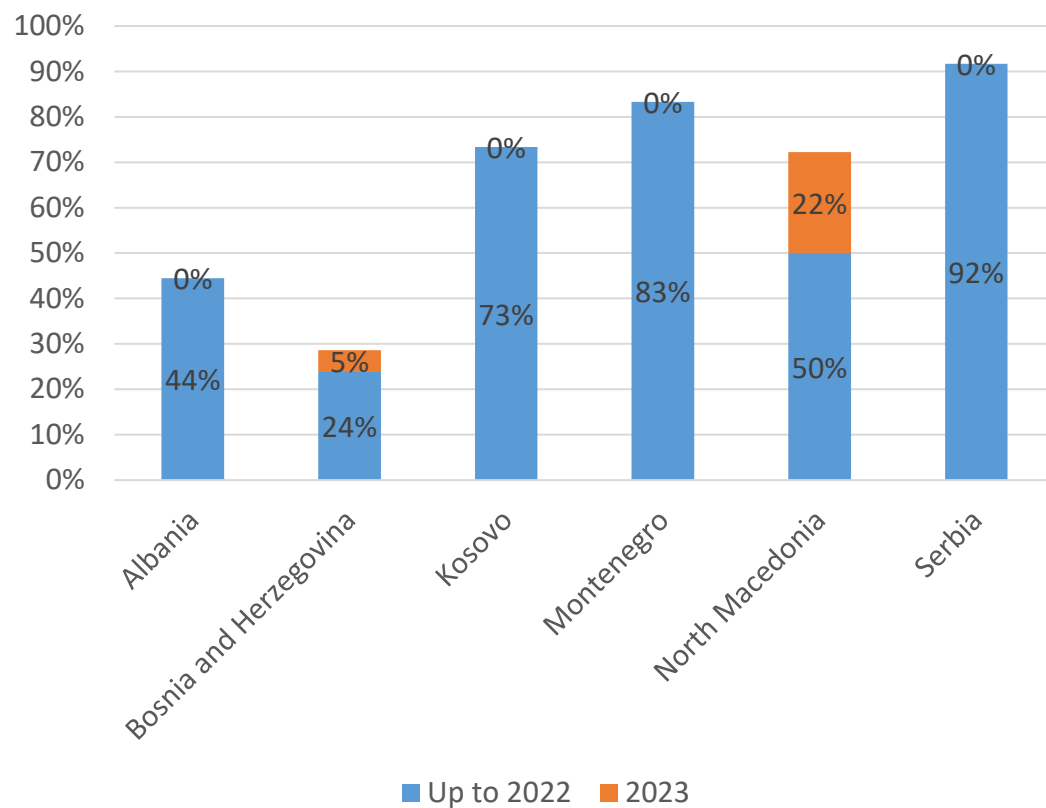
**Joint activities with ERA**  
**EVR trainings, ERTMS training, Driver license training**

# Implementation of the Rail Action Plan Progress Report 2022-2023

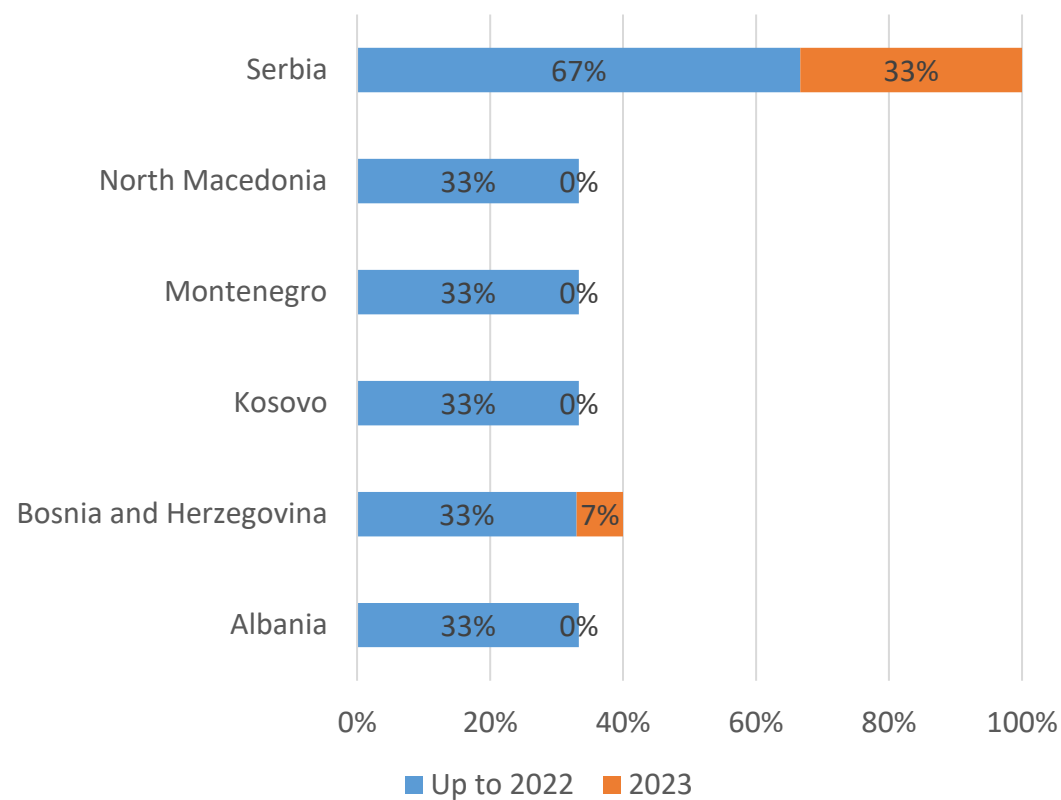
Transport Community Secretariat

# Rail Action Plan Progress

Rail Market Opening



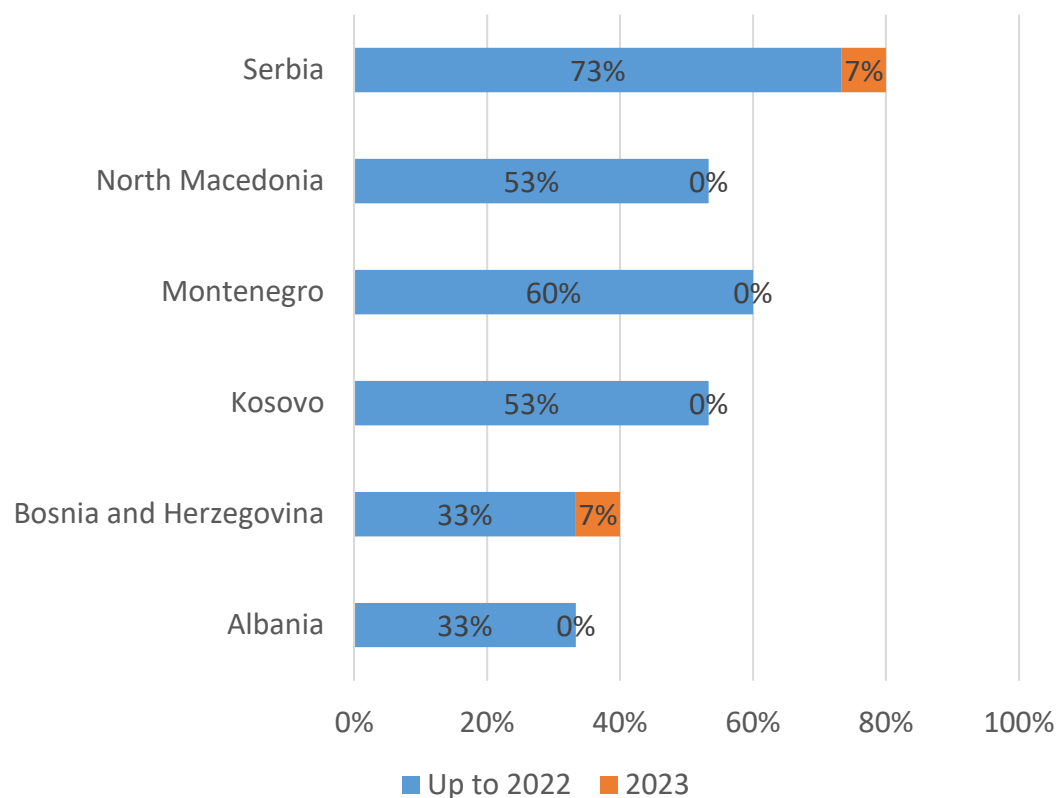
Passenger rights



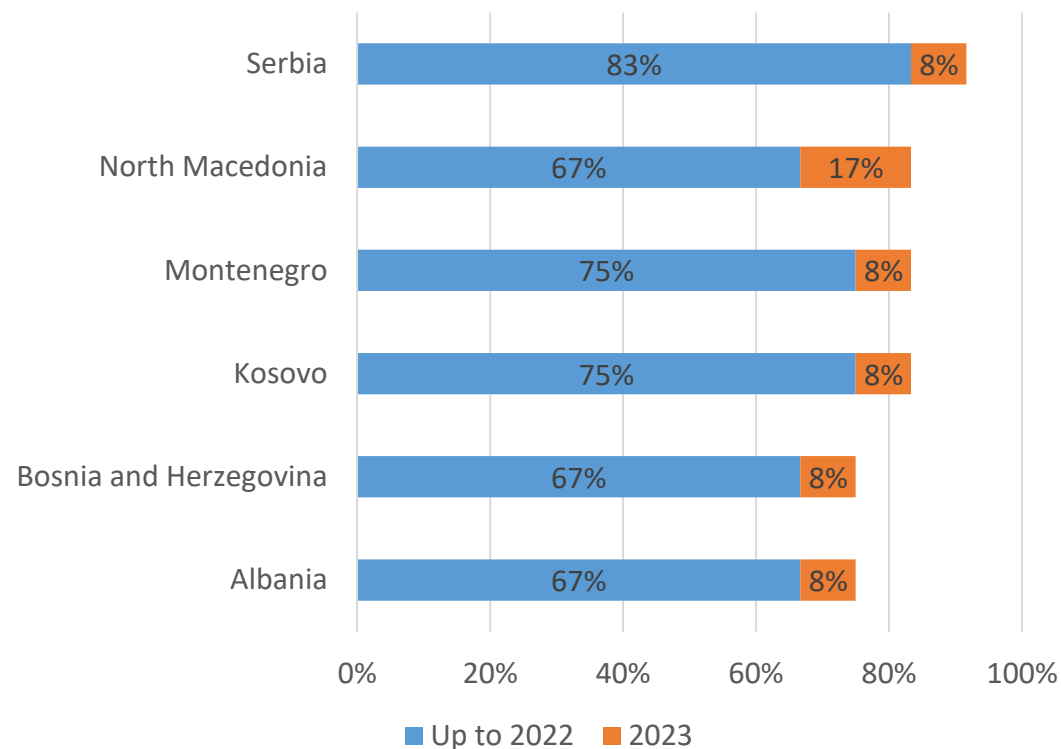
# Rail Action Plan Progress



Interoperability



Modernisation of railway infrastructure

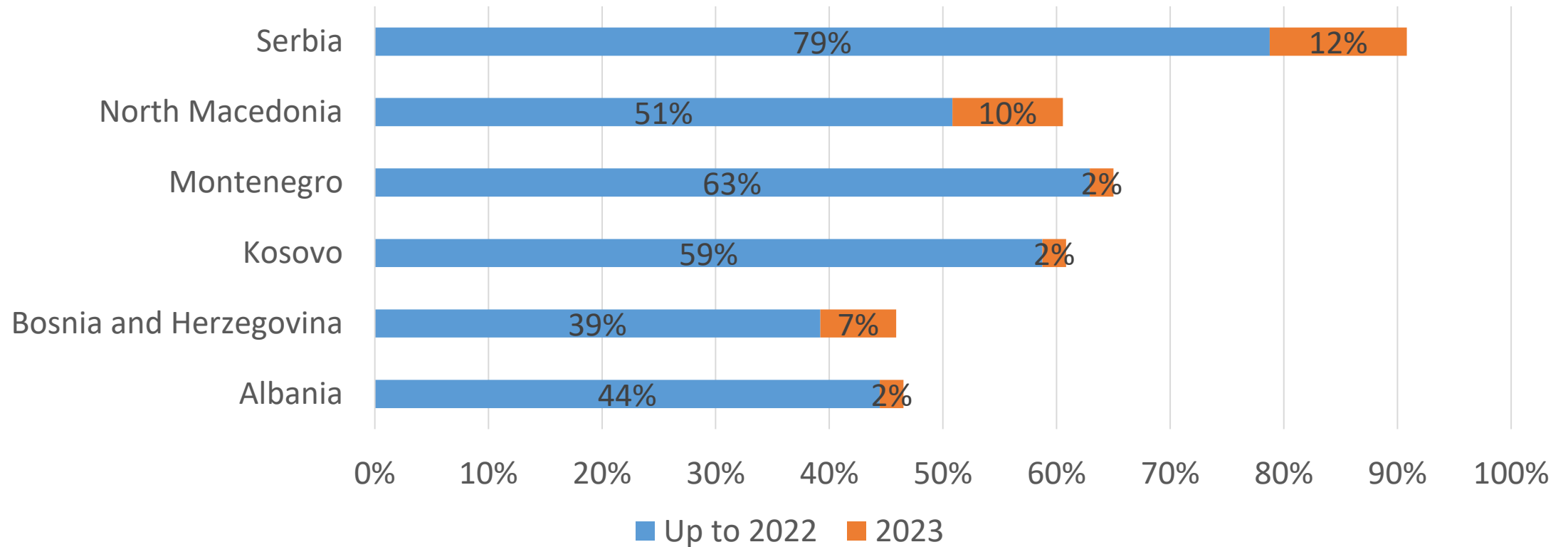




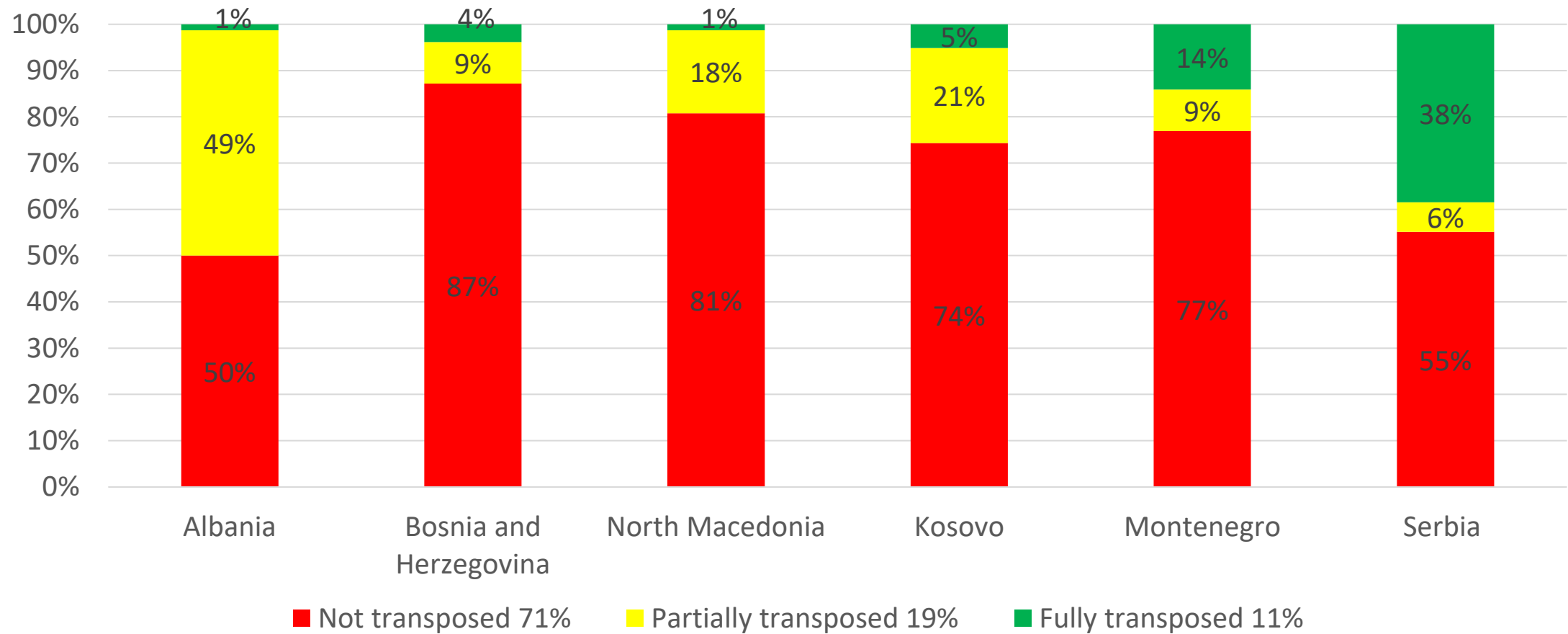
# Rail Action Plan Progress



## Overall progress



# Annex I of TCT Progress



# Revision of the TEN-T Network

DG MOVE – Aurimas Brazys

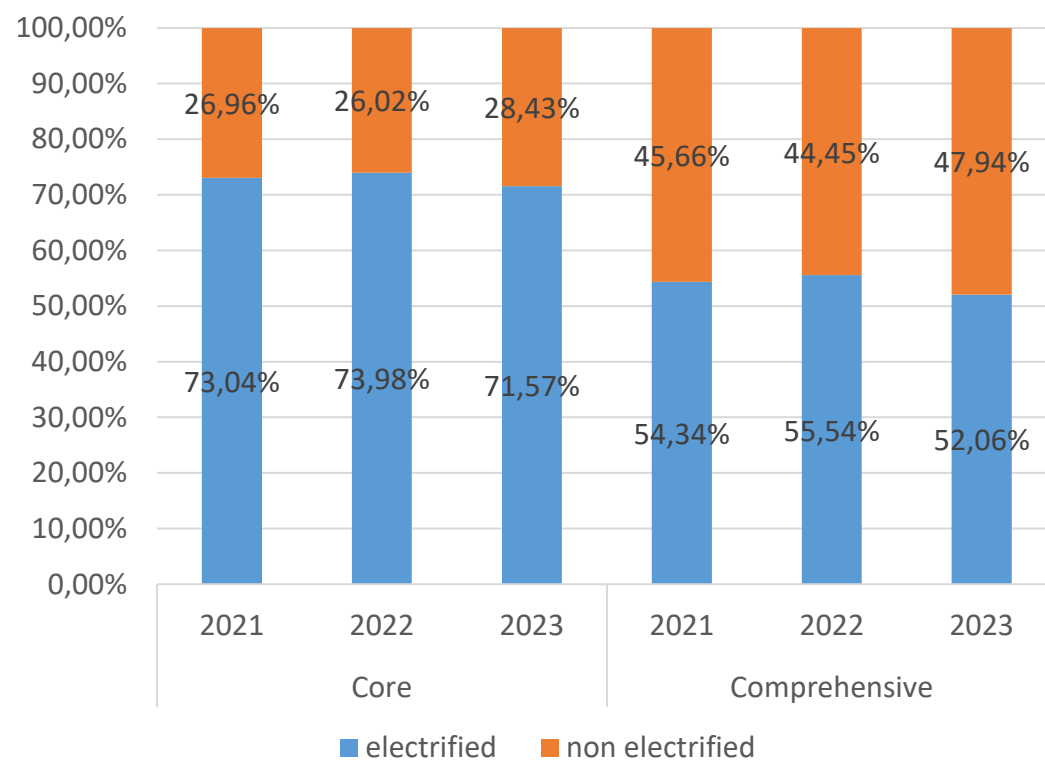
# Status of TEN-T projects – update, TEN-T report

TCT Secretariat, Regional Partners, JASPERS

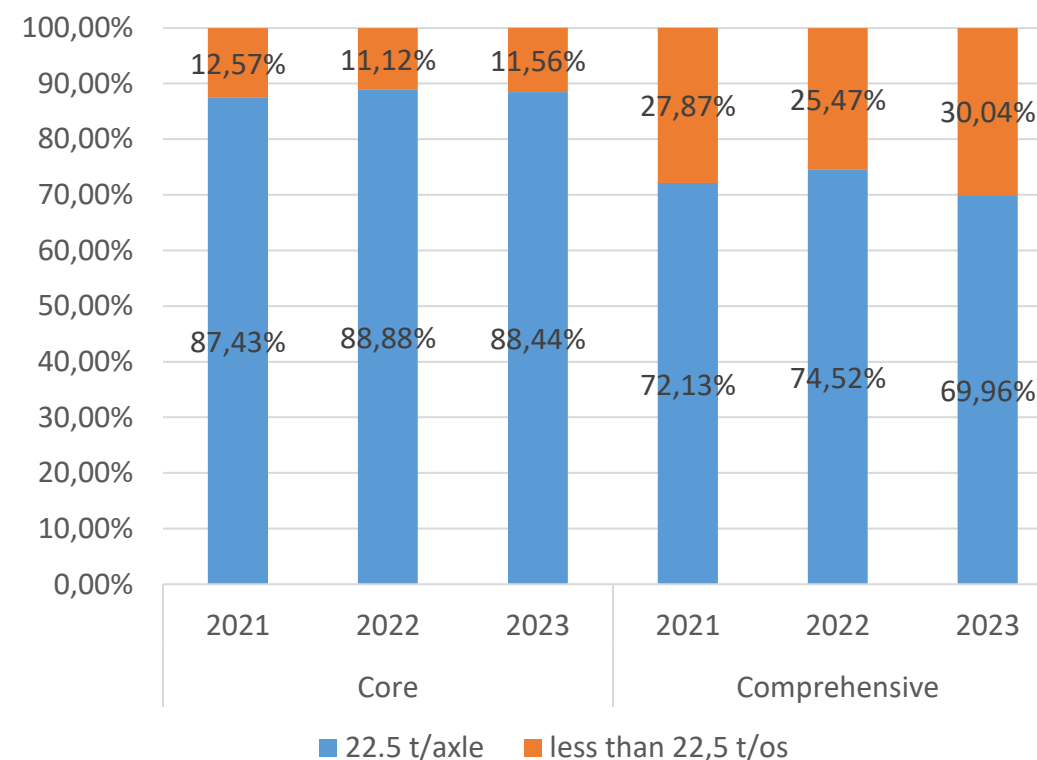
# TEN-T Progress Report



Percentages of electrified and non-electrified lines  
2022/2023

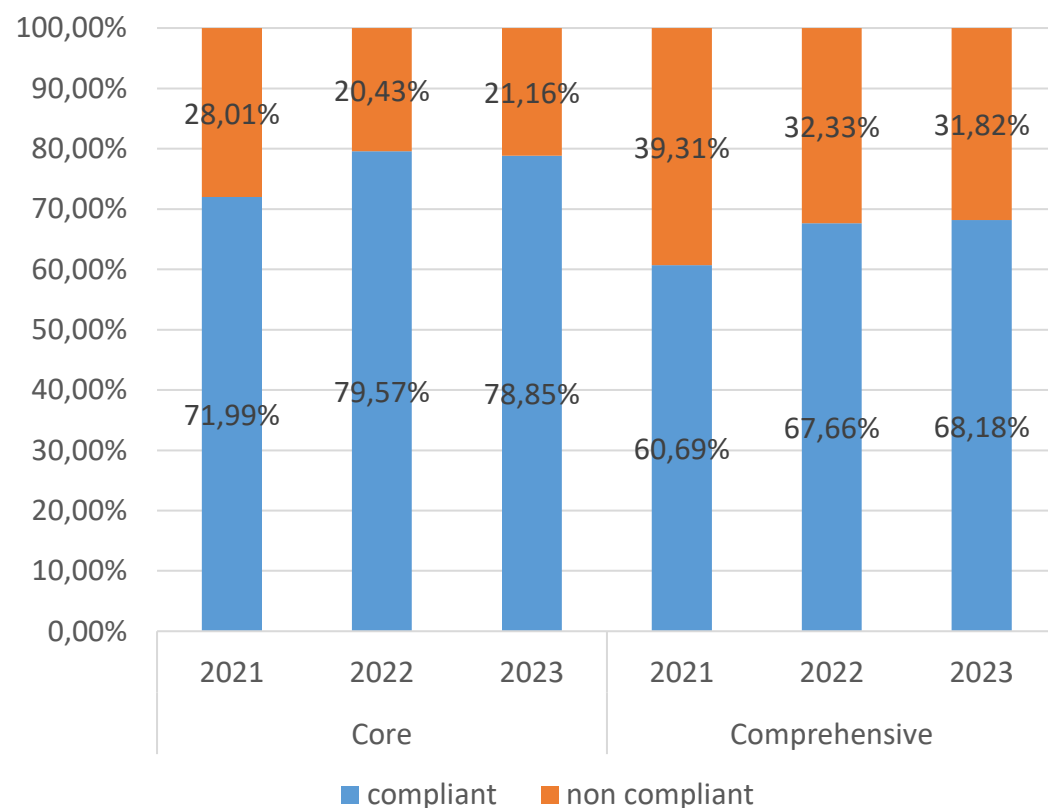


Axle load in tonnes/axle on Core and Comprehensive  
Network 2022/2023

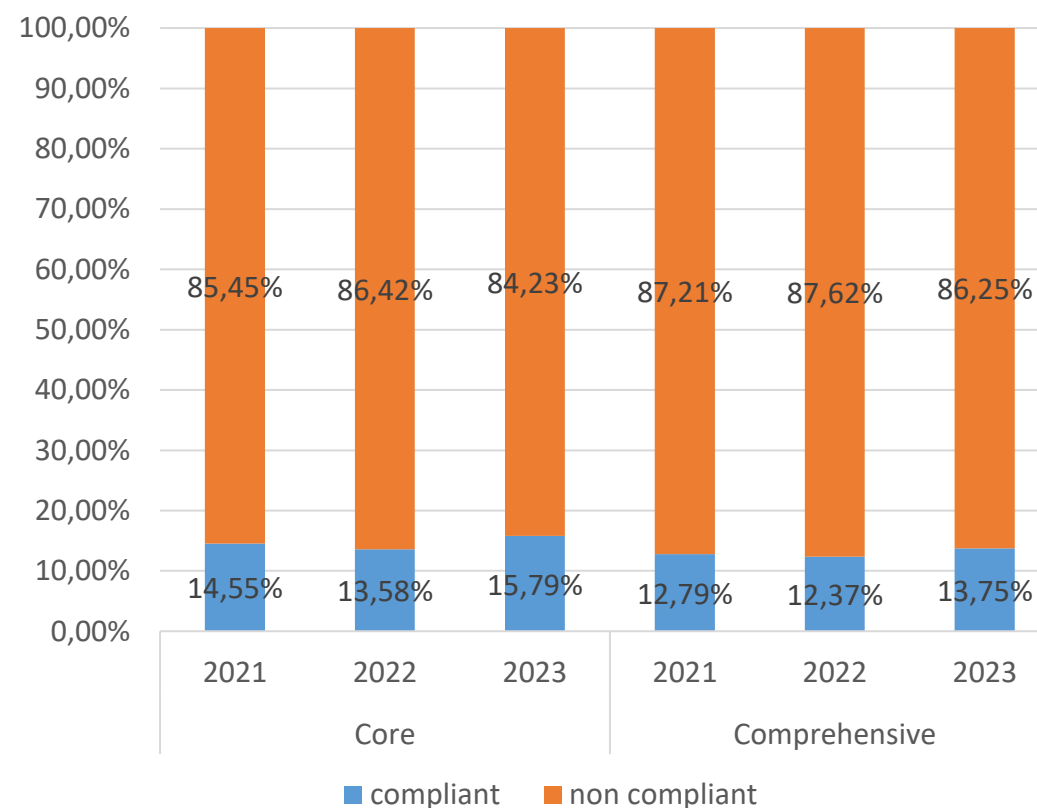


# TEN-T Progress Report

Design Speed 100 km/h and over 2022/2023



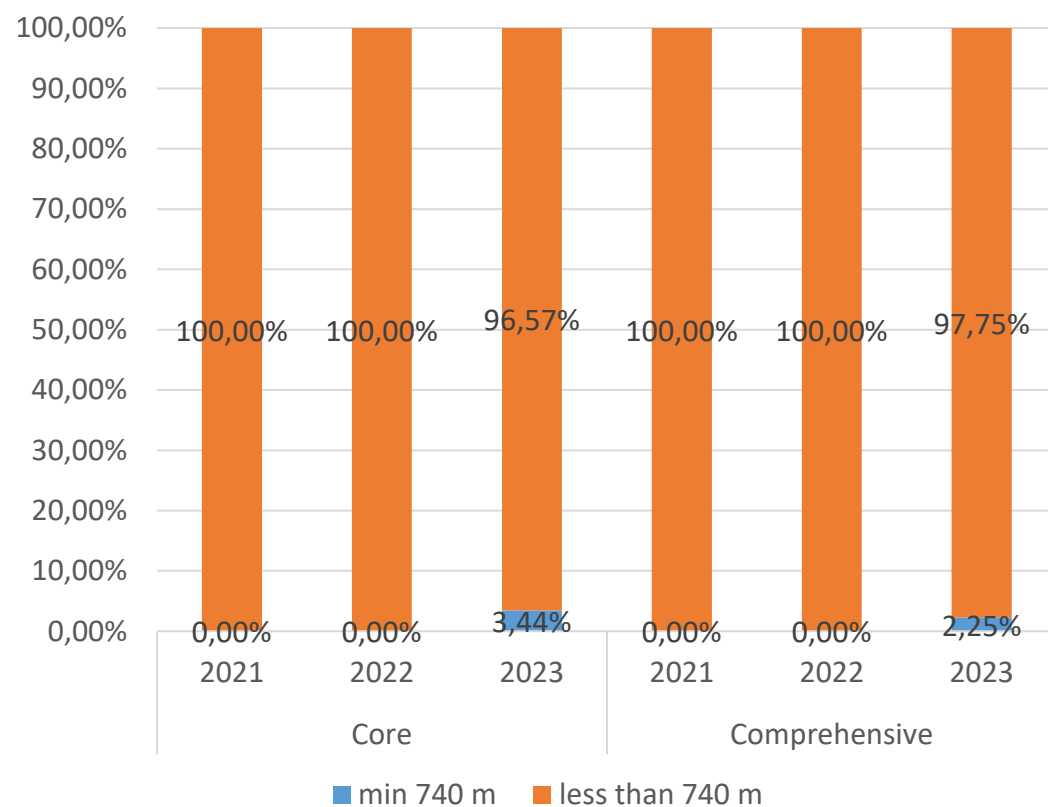
Operating Speed 100 km/h and over for 2022/2023



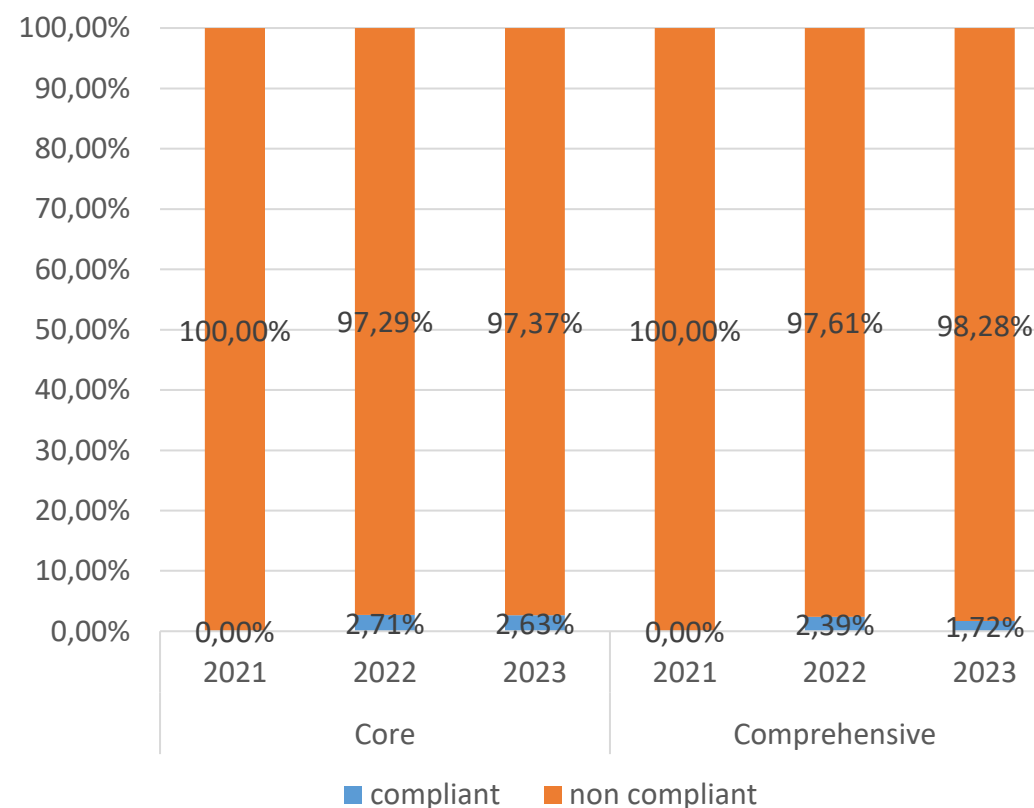
# TEN-T Progress Report

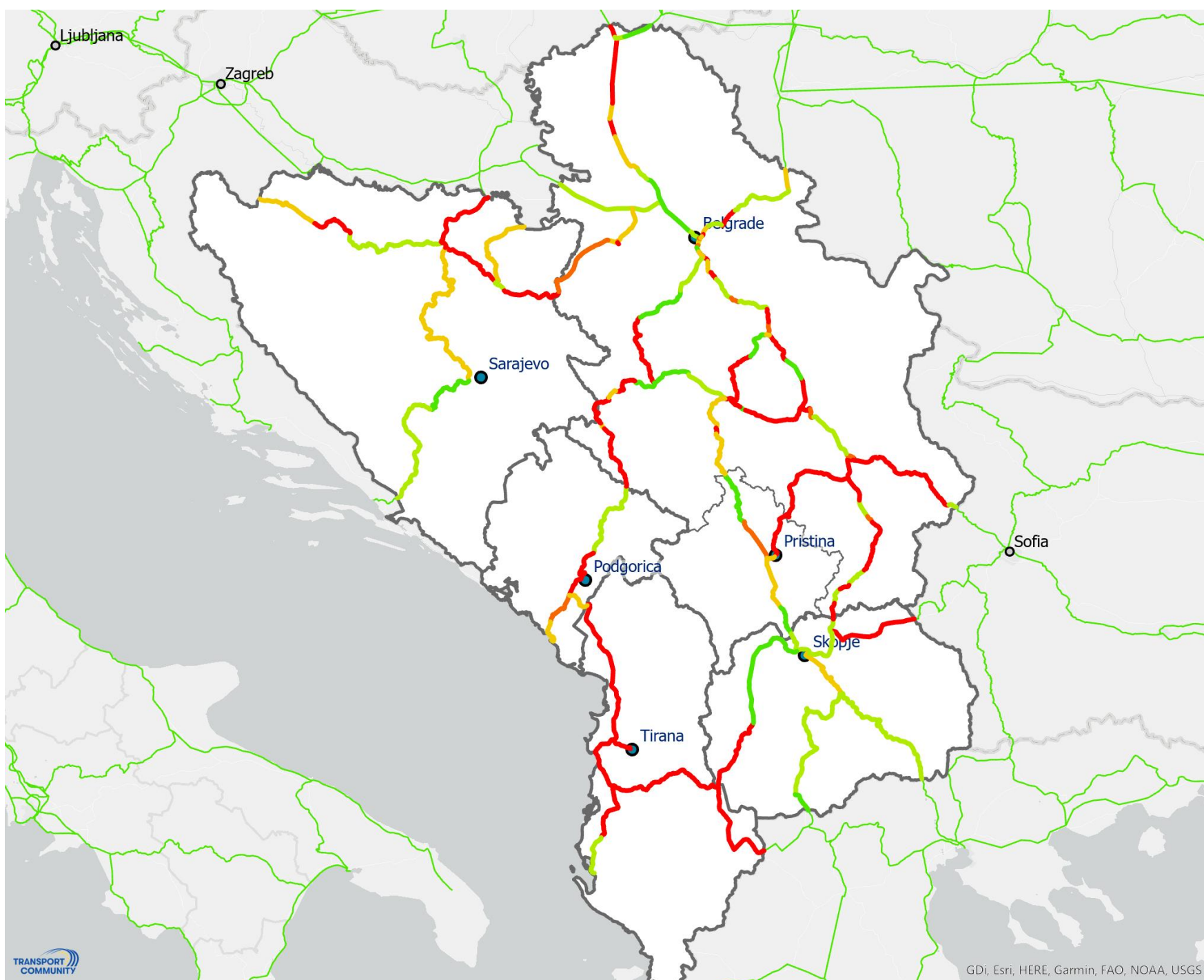


Train length 2022/2023



ERTMS deployment 2022/2023







# Solidarity lanes – Development of the rail connections with Ukraine

DG MOVE - Laurent Pratt

# Coffee break

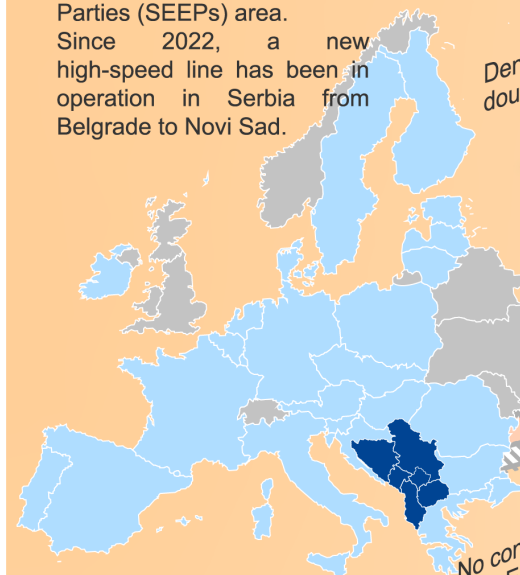


# Assessment of the Rail Market at the Western Balkan

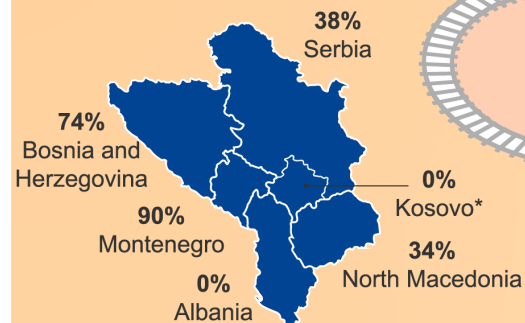
TCT Secretariat

## 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):



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

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

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.

Total number of freight terminals: 11

Average distance between stations: 9,98 km

## LAND MODAL SHARE

## UTILISATION OF RAIL INFRASTRUCTURE FOR PASSENGER AND FREIGHT TRANSPORT

0.756



2.17



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

0.045



South East European Parties (SEEPs)

2.02



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

EU-27

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

## MODAL SPLIT

17% Cars

6% Rail

40% Tram and Metro

37% Busses and Coaches

77% Road

5% Inland water way

6% Rails

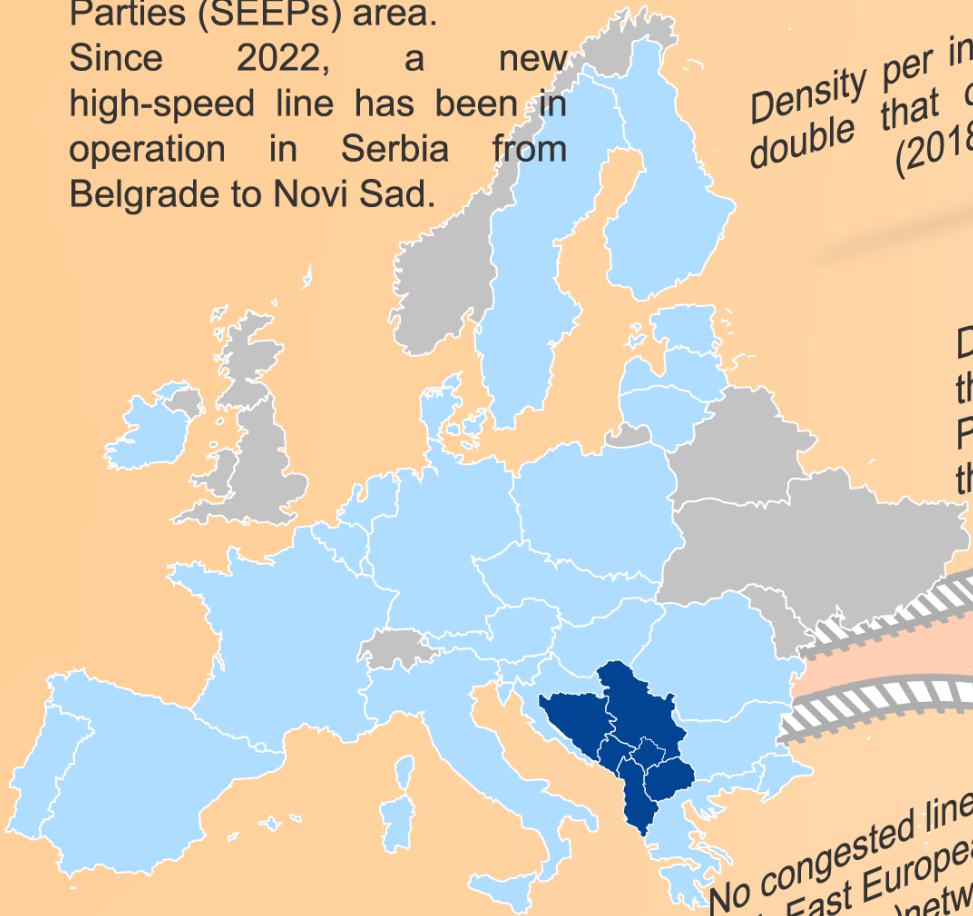
## RAIL SERVICES

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

90% of all train kilometres run are freight services.

RAILWAY NETWORK

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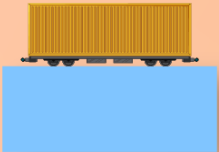
No congested lines on the South East European parties (SEEPs) network.

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LAND MODAL SHARE

UTILISATION OF PASSENGER

0.756



0.045



South East European Parties (SEEPs)

EU-27 900 km

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

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).

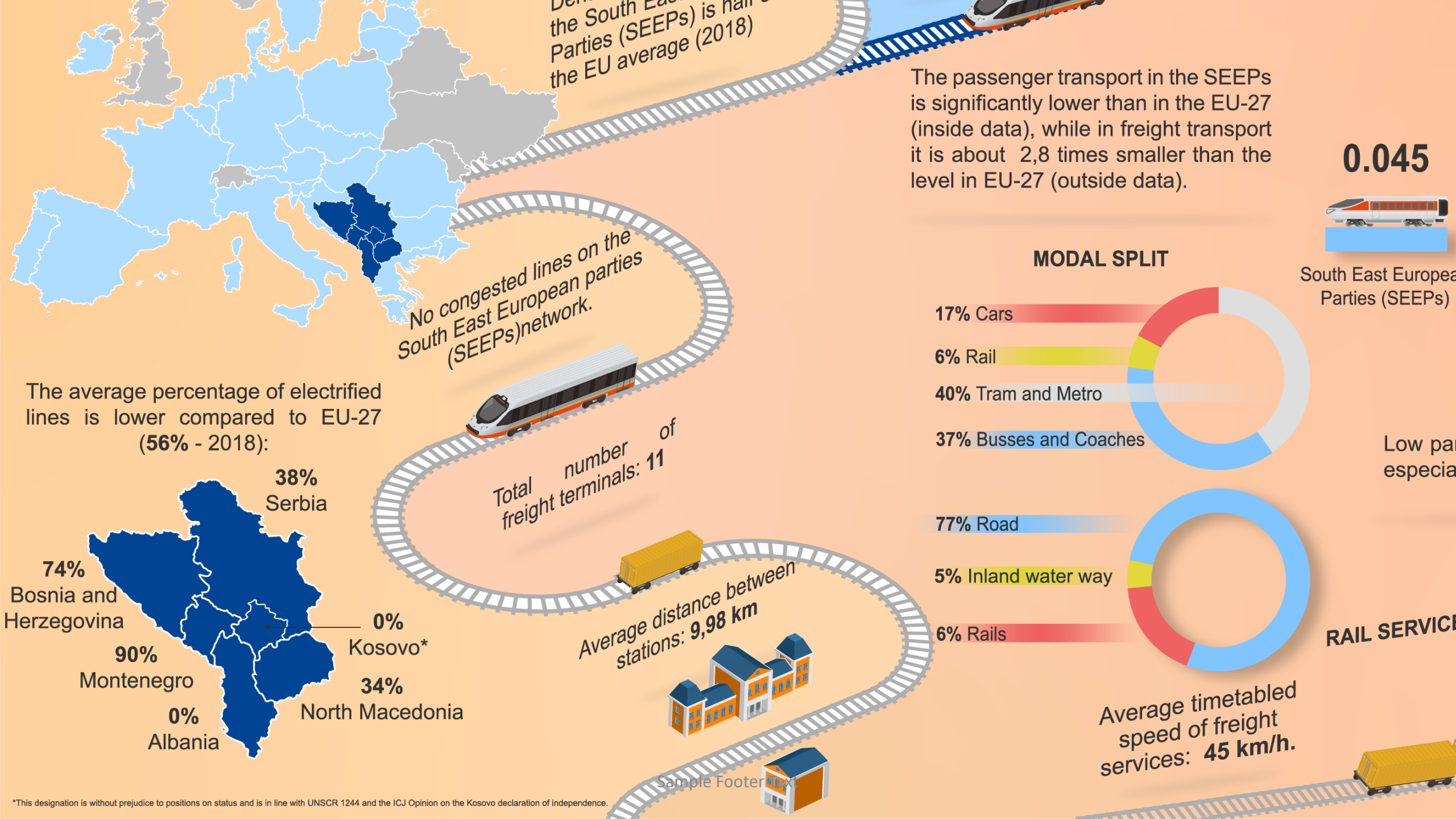
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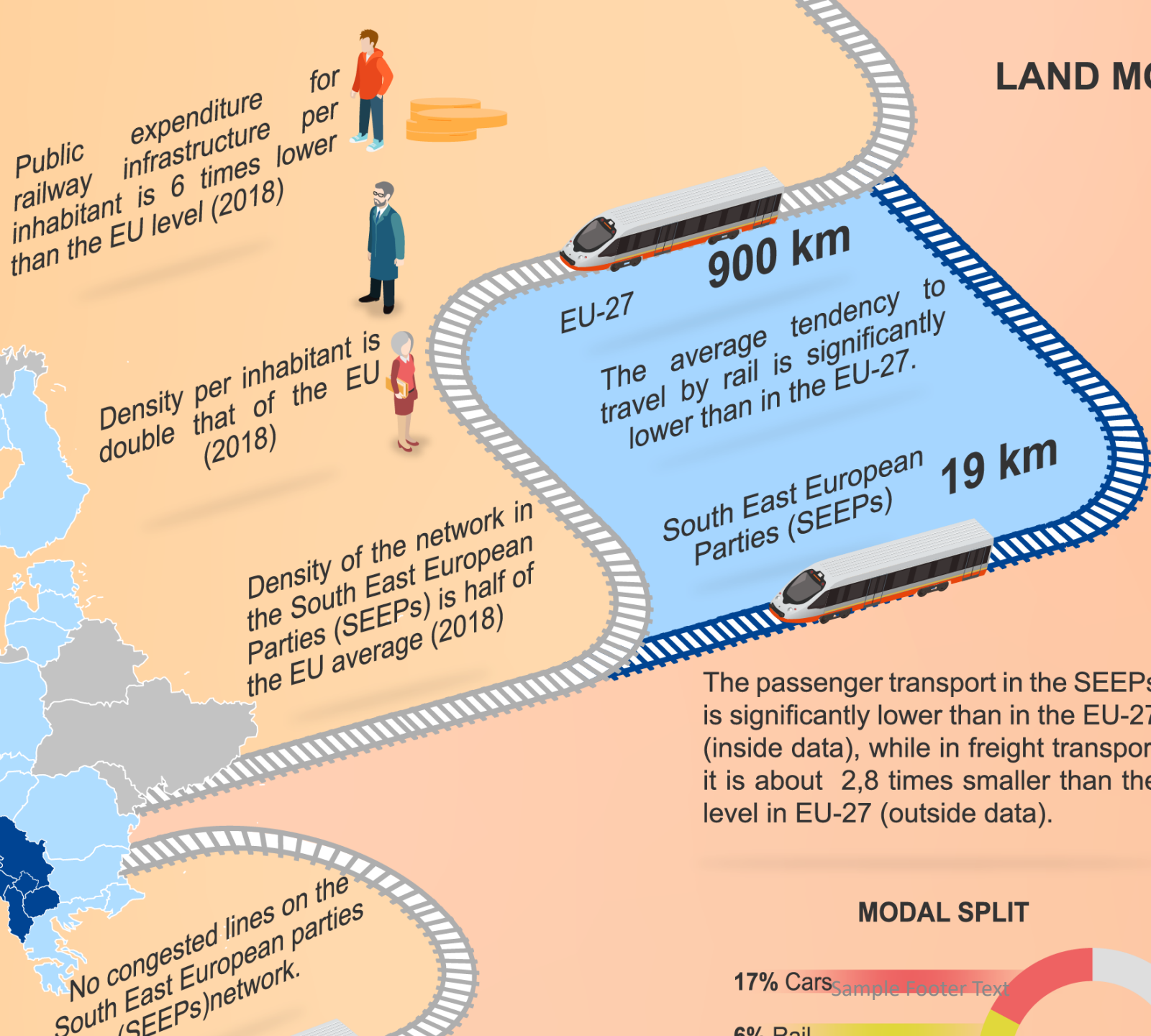




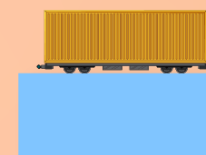


# LAND MODAL SHARE

## UTILISATION OF RAIL INFRASTRUCTURE FOR PASSENGER AND FREIGHT TRANSPORT



0.756



2.17



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

0.045



South East European  
Parties (SEEPs)

2.02



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

EU-27

## MODAL SPLIT

17% Cars

6% Rail

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Den... the South East... Parties (SEEPs) is half... the EU average (2018)

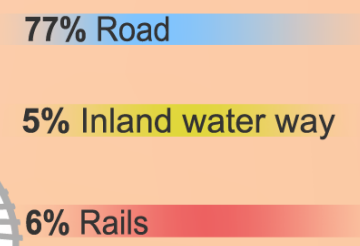
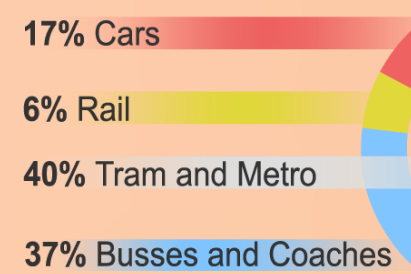
No congested lines on the South East European parties (SEEPs) network.

ied 27

0% Kosovo\*  
34% Macedonia

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



0.045



South East European Parties (SEEPs)

2.02



EU-27

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

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

### RAIL SERVICES

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%

PUBLIC RAILWAY  
UNDERTAKING

Freight services 81%

PRIVATE RAILWAY  
UNDERTAKING

Freight services 19%

Passenger services 0%

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

RAILWAY  
MARKET

RAILWAY UNDERTAKING REVENUES EUR PER TRAIN-KM

34.54

2.54

Passenger services

Freight services

18.04

Passenger services

20.25

Freight services

South East European Parties (SEEPs)  
2021

EU-27  
2018

Number of active railway licences:  
37

ACTIVE RAILWAY LICENCES PER SOUTH EAST EUROPEAN PARTIES (SEEPS)

North Macedonia 1  
Closed railway market in Bosnia and Herzegovina and North Macedonia

Bosnia and Herzegovina 2

Kosovo 3

Albania 4

Montenegro 4

Serbia 23

Passenger services 100%

PUBLIC RAILWAY UNDERTAKING

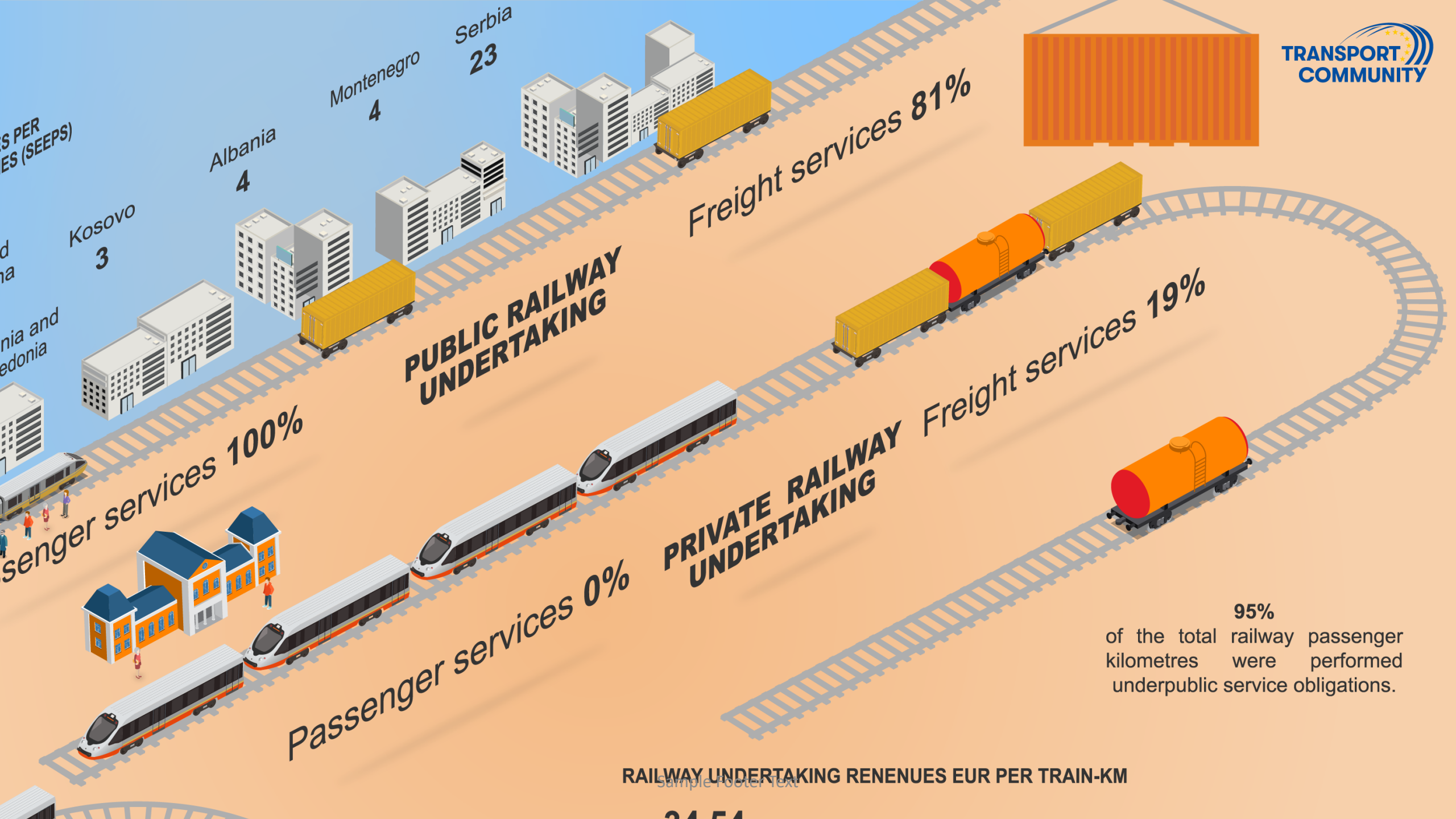
Freight services 81%

Passenger services 0%

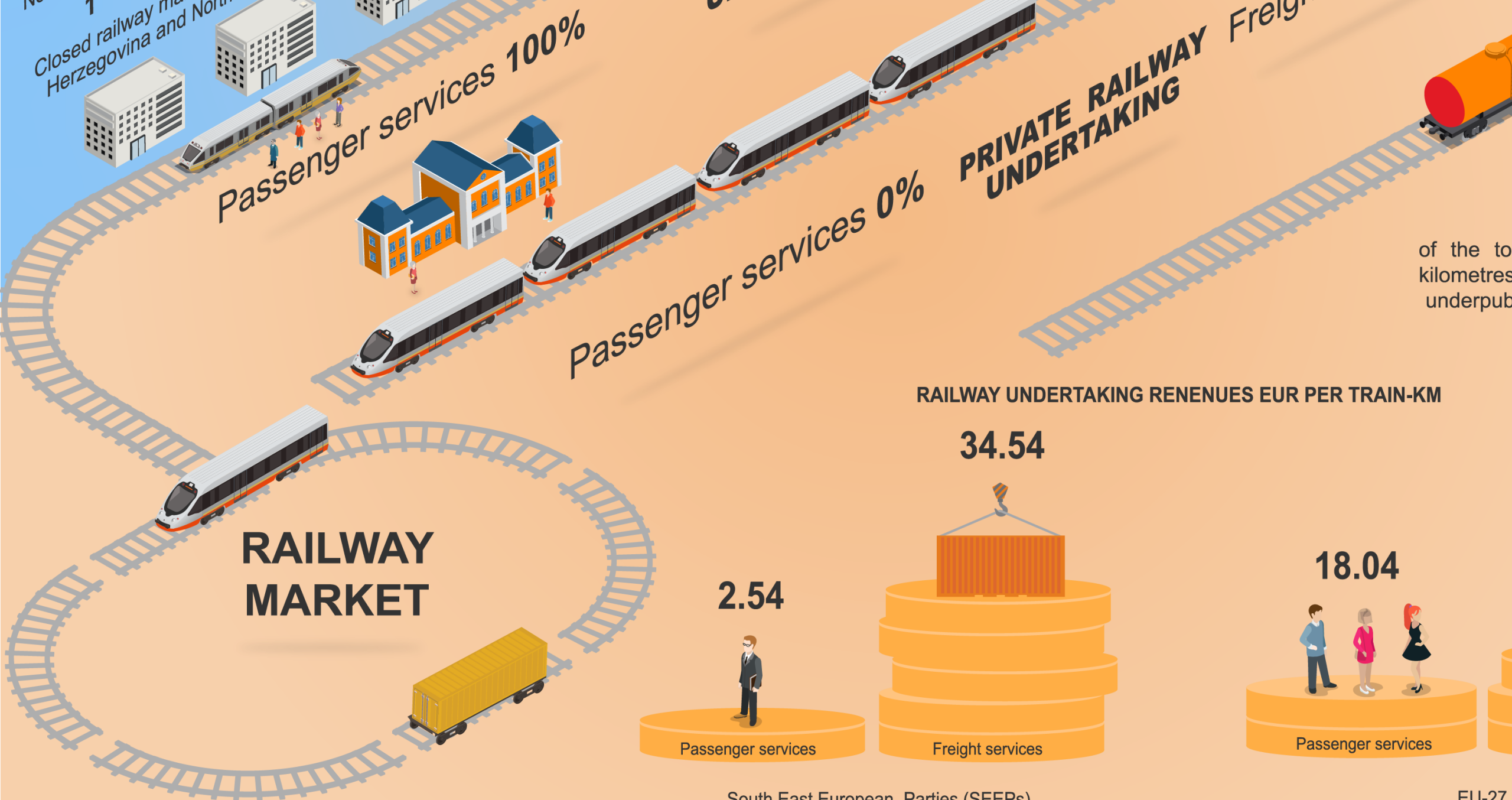
PRIVATE RAILWAY UNDERTAKING

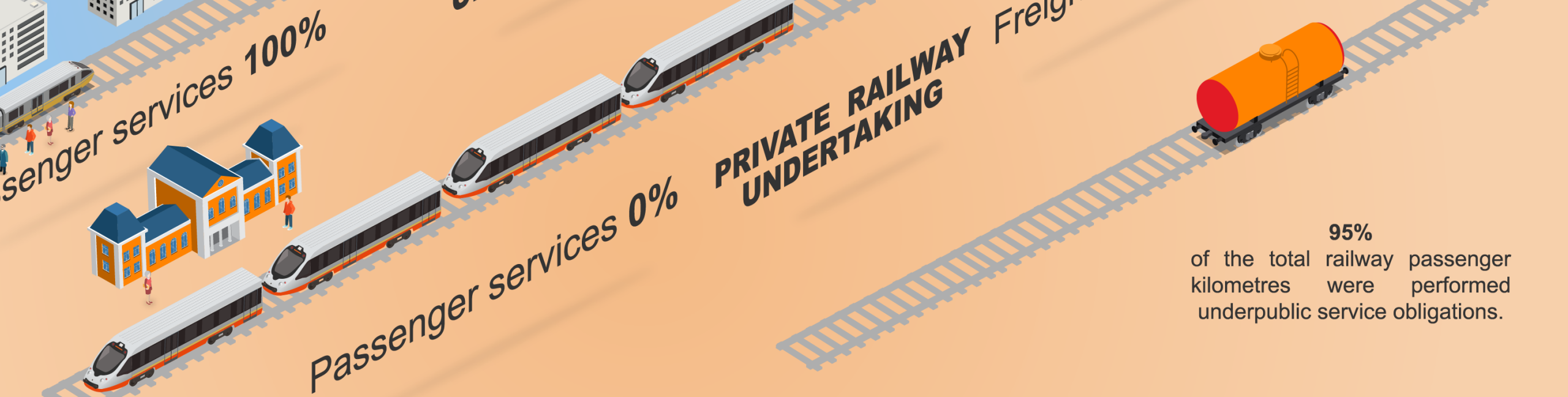
Freight services 19%

of the to  
kilometres  
underpub

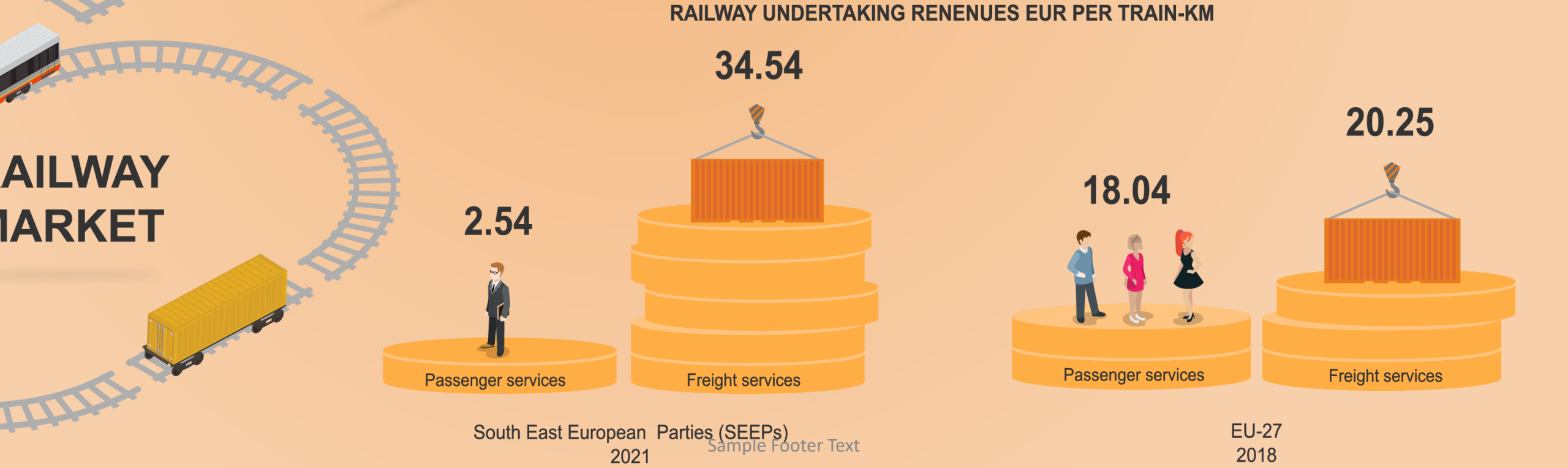








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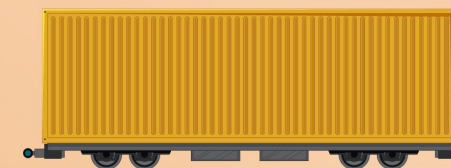
# INFRASTRUCTURE CHARGING

## STRUCTURE OF INCOME FROM TRACK ACCESS CHARGES - TACS (PLUS STATION CHARGES OR TERMINAL CHARGES)

Passenger services  
29%



Freight services  
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

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)

### INFRASTRUCTURE EXPENDITURE PER INHABITANT IN SEEPS

20%

6%

6%

68%



Maintenance



Renewal



Upgrade



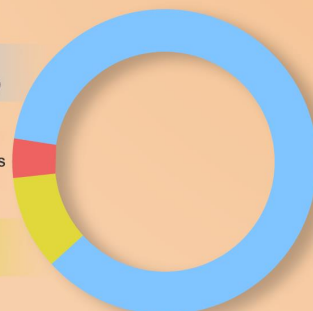
New infrastructure

95% of investments in new infrastructure were carried out in Serbia and 5% in North Macedonia

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%

Sample Footer Text



# INFRASTRUCTURE CHARGING

## STRUCTURE OF INCOME FROM TRACK ACCESS CHARGES - T (PLUS STATION CHARGES OR TERMINAL CHARGES)

Passenger services  
**29%**



Freight services  
**71%**

### TRACK ACCESS CHARGES FOR PASSENGER TRAINS\*

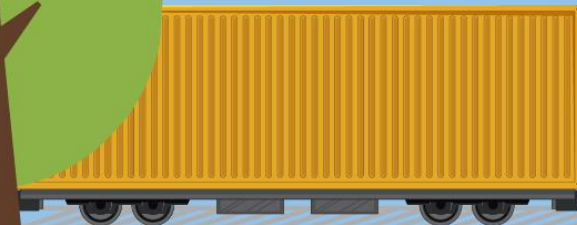
### TRACK AC

Long-distance  
**1.74 eur/train-km**



**6000 gross tonnes**  
**4.3 eur/train-km**

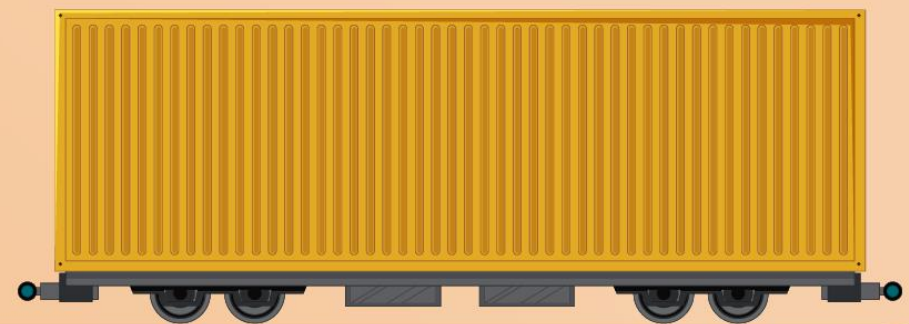
Suburban and regional  
**1.04 eur/train-km**



# STRUCTURE OF INCOME FROM TRACK ACCESS CHARGES - TACS (PLUS STATION CHARGES OR TERMINAL CHARGES)



Freight services  
71%



## PASSENGER 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)

## INFRASTR

20%



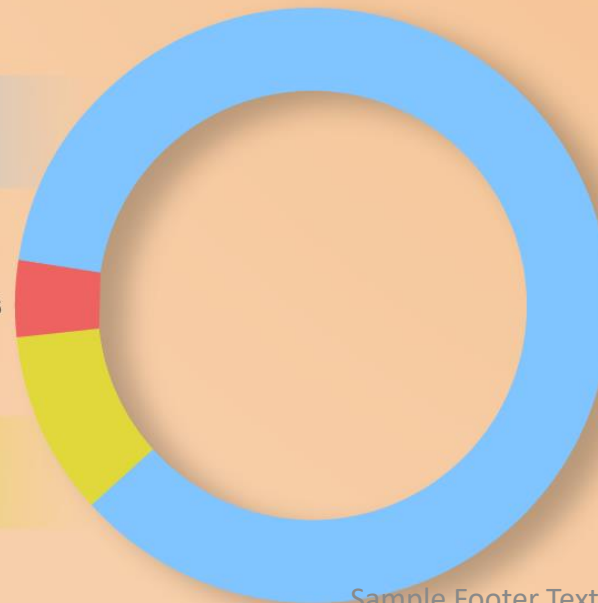
### 86% Public funds

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### 10% EU funds

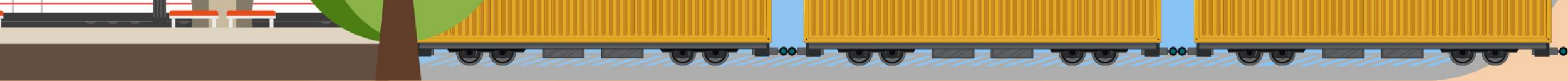


Share of EU funds in rail infrastructure expenditure ranged from 0% to 35%



Maintenance

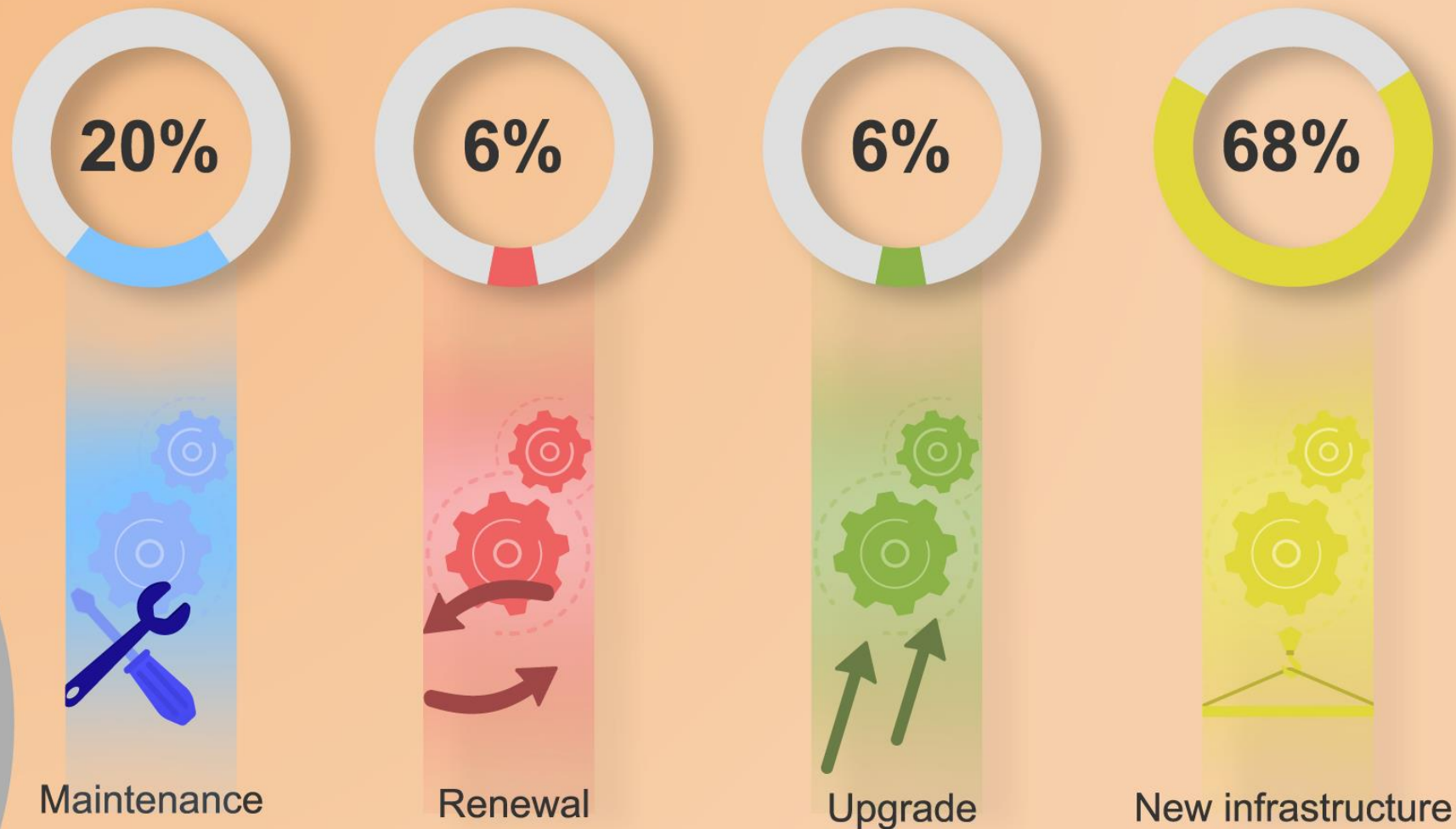
95% of invest



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

EUR 14.6 vs EUR 87  
(EU-27 – 2018)

## INFRASTRUCTURE EXPENDITURE PER INHABITANT IN SEEPS



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

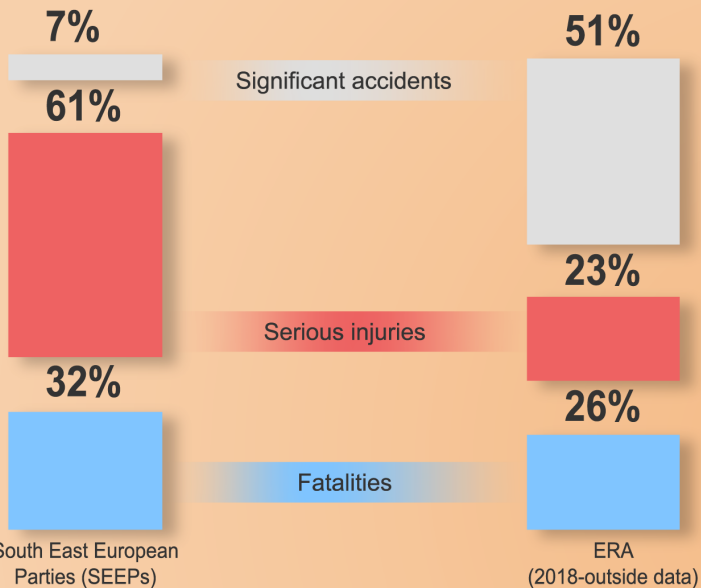
**95%** of investments in new infrastructure were carried out in Serbia and  
**5%** in North Macedonia

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*\*incl. mark-ups*

## QUALITY OF RAIL SERVICES

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



IN 2021 OVER 20900 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).

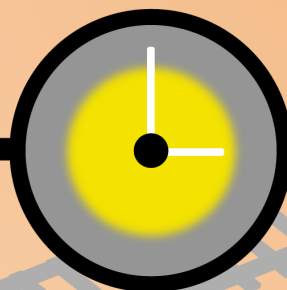
5% are employed by private railway undertakings (RUs).

Proportion of staff of main RUs older than 50 years – 54.8%

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

Proportion of women in railway workforce – 16.5%

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.



Cancelled 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%).

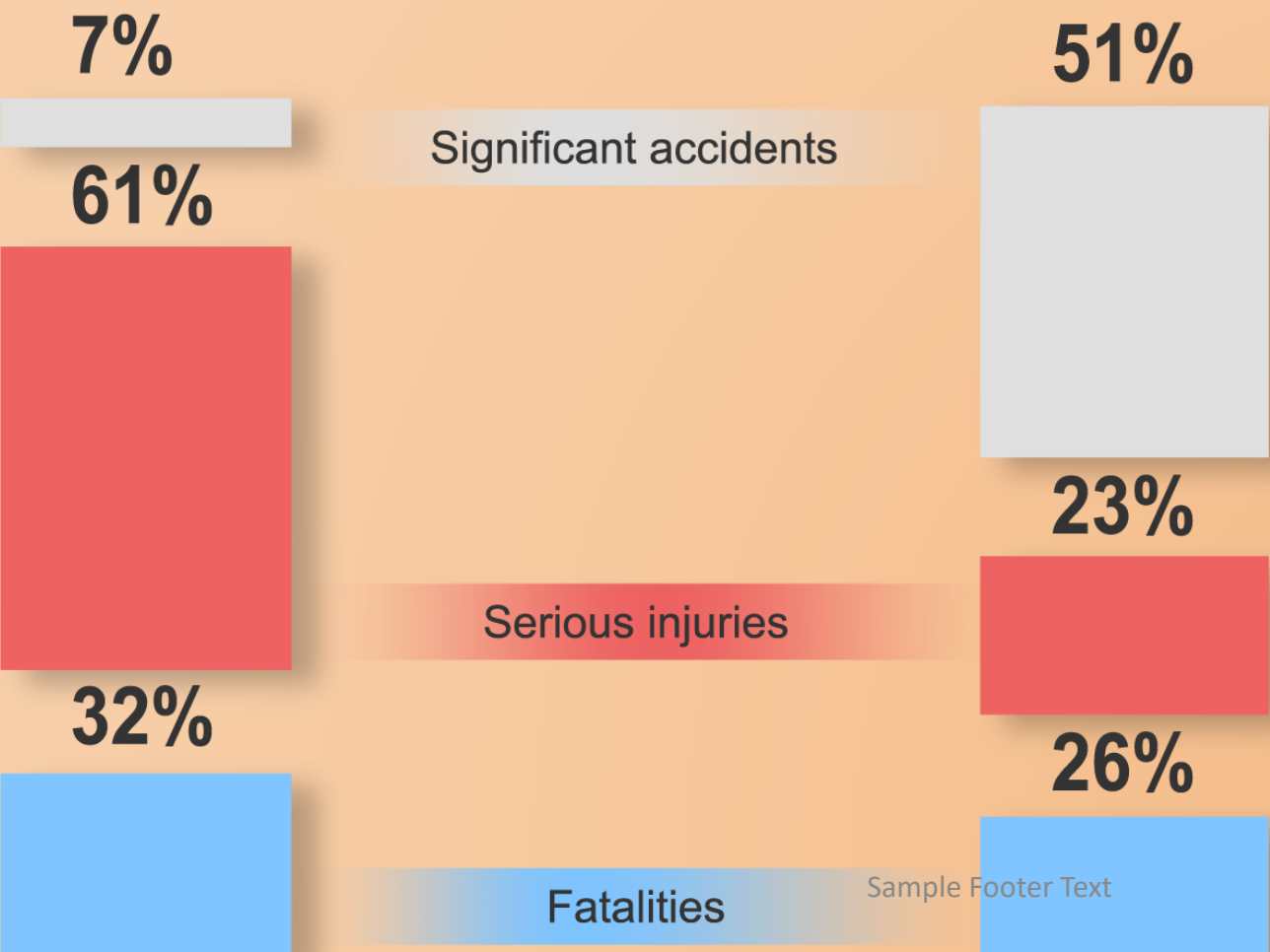
## EMPLOYMENT AND SOCIAL CONDITIONS



# QUALITY OF RAIL SERVICES



Traveling by car being more than **50** times riskier than travelling by tra



IN 2021 OVER 20900 PEOPLE WERE EMPLOYED BY  
EAST EUROPEAN PARTIES (SEEPS) RAILWAY

Staff employed by  
undertakings

5%  
are employed by private railway  
undertakings (RUs).



Travelling by car being more than **50** times riskier than travelling by train



**51%**

**IN 2021 OVER 20900 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).

**23%**

**5%**

are employed by private railway undertakings (RUs).

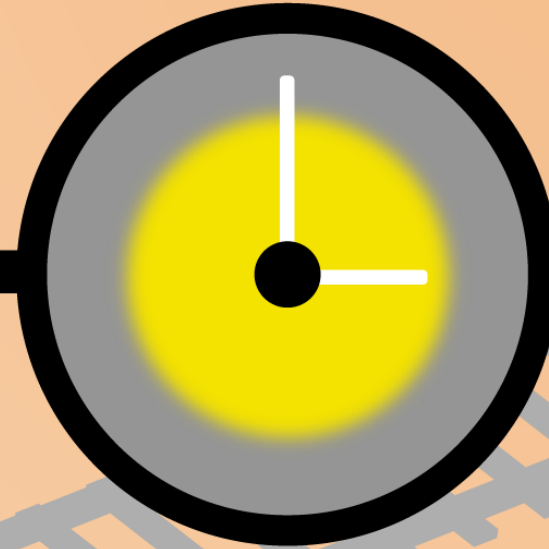
**26%**

Fatalities

South East European  
Parties (SEEPs)

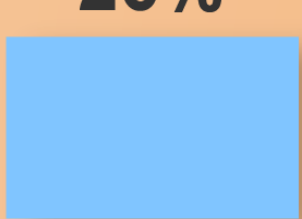
ERA  
(2018-outside data)

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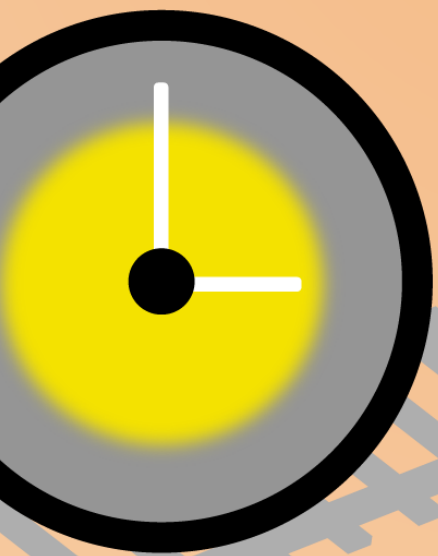


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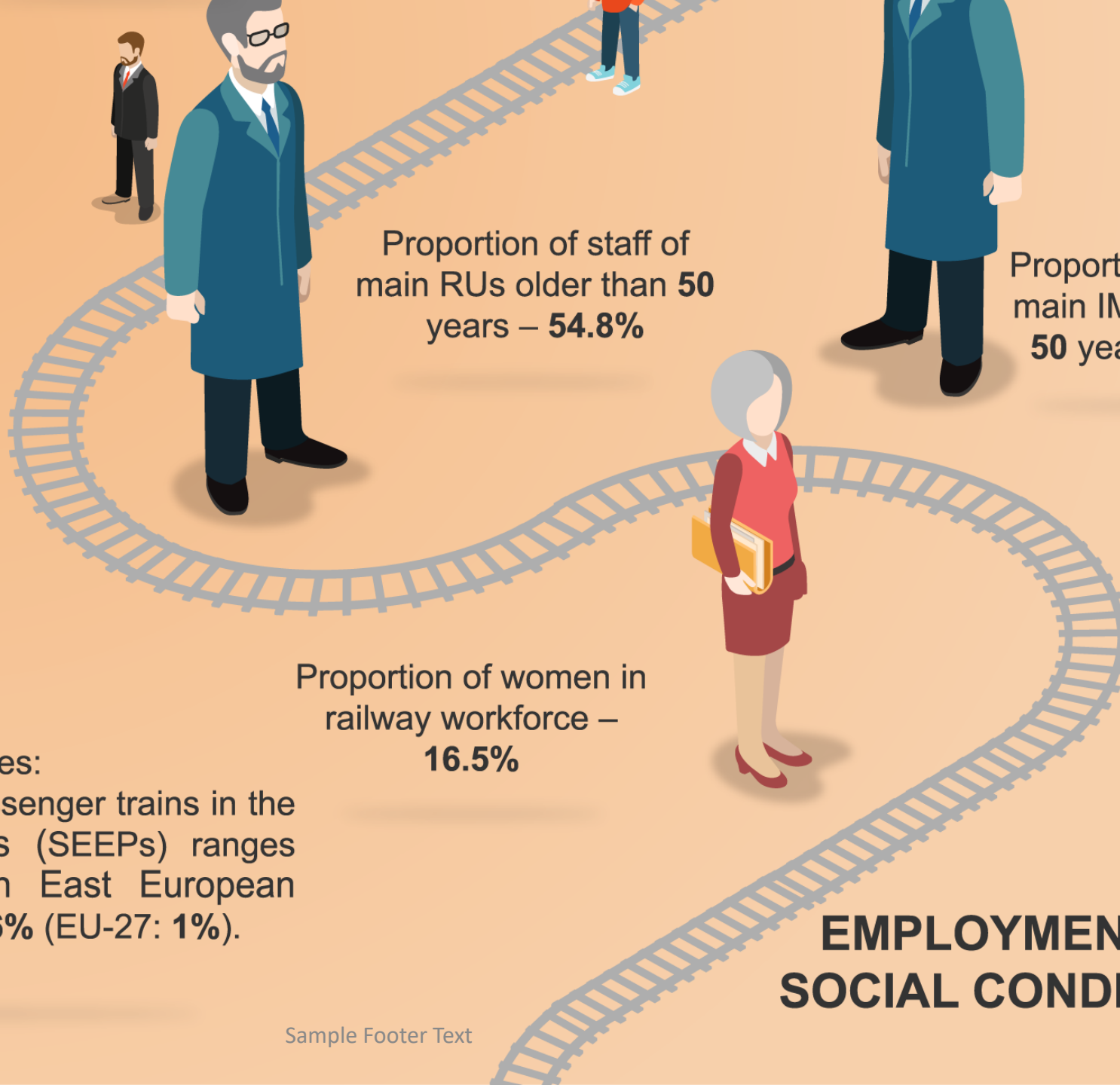


ERA  
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Canceled services:

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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%**

## EMPLOYMENT AND SOCIAL CONDITIONS

# Recommendations



**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



**Albania:**

**Railway bridge over Ishem River, rail access to new terminal in Porto Romano**



**Bosnia and Herzegovina:**

**Increase in train speed, decrease border crossing time, access to Port Terminal Brcko**



**Kosovo:**

**Miradi Terminal, reopening of Route 10 Mitrovica – Lesak – Kraljevo for international traffic**



**Montenegro:**

**Port of Bar rail infrastructure**



**North Macedonia:**

**Modernisation of Skopje Terminal**



**Serbia:**

**Encourage more private terminal operators to invest in last mile**

# 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

ERA

# 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

- Update

# Concluding remarks

