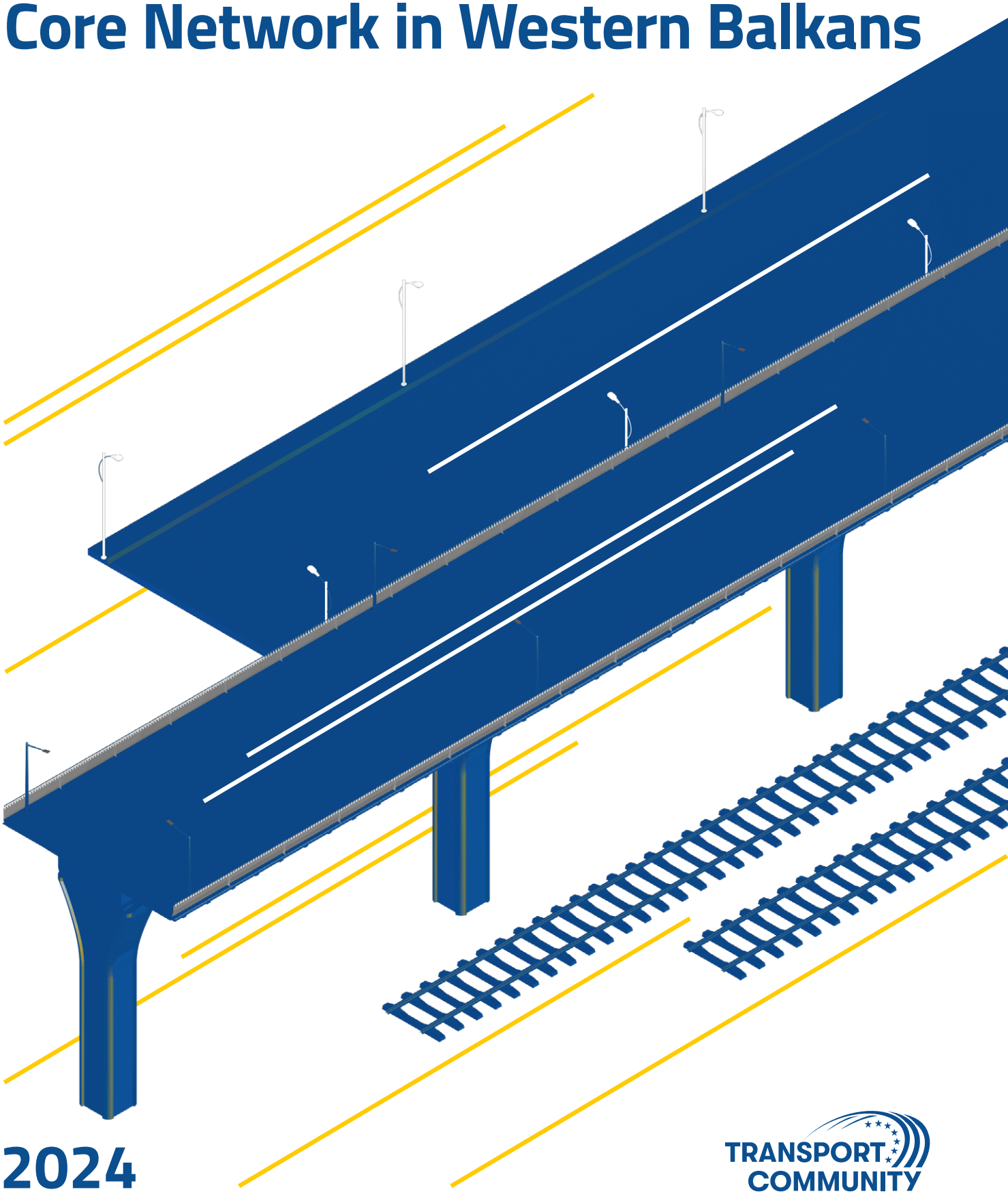
Five-year Rolling Work Plan for Development of Indicative TEN-T Extension of Comprehensive and Core Network in Western Balkans



2024

TRANSPORT COMMUNITY

Five-year Rolling Work Plan for Development of Indicative TEN-T Extension of Comprehensive and Core Network in Western Balkans

2024

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Contents

List of abbreviations

AND	European Agreement concerning the International Carriage of Dangerous Goods by Inland Waterways
ADR	Agreement concerning the International Carriage of Dangerous Goods by Road
AGN	European Agreement on Main Inland Waterways of International Importance
AIS	Automatic Identification System
Annex 1	Annex 1 of the Transport Community Treaty
BHMAC	Bosnia and Herzegovina Mine Action Centre
CBA	Cost Benefit Analysis
CEF	Connecting Europe Facility
CEFTA	Central European Free Trade Agreement
CEMT / ECMT	European Conference of Ministers of Transport
CEN	European Committee for Standardisation
CESNI	European Committee for drawing up standards in the field of inland navigation
COTIF	Convention concerning International Carriage by Railway
EBRD	European Bank for Reconstruction and Development
EC	European Commission
EIA	Environmental Impact Assessment
EIB	European Investment Bank
EIP	EU's Economic and Investment Plan for the Western Balkans
ERTMS	European Railway Traffic Management System
ETCS	European Train Control System
EU	European Union
EUSAIR	EU Strategy for the Adriatic – Ionian Region
IPA	Instrument for Pre-Accession
ITS	Intelligent Transport Systems
IWW	Inland Waterways
JBCP	Joint Border Crossing Points
KPIs	Key performance indicators
LNG	Liquified Natural Gas
NAIADES	Navigation and Inland Waterway Action and Development in Europe
RID	Regulations concerning the International Carriage of Dangerous Goods by Railway
RIS	River Information System
RP	Regional Partners (Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia, Montenegro, Serbia)
RSC	Regional Steering Committee
SEE	South East Europe
SLA	Service Level Agreement
SPP	Single Project Pipeline
TC	Transport Community
TCPS	The Transport Community Permanent Secretariat
TEN-T	Trans-European Networks Transport
VHF	Very High Frequency
VTMIS	Vessel Traffic Management Information System
WB	Western Balkans
WBIF	Western Balkans Investment Framework

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence

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Foreword

This second edition of our Five-Year Rolling Plan, which coincided with the fifth anniversary of the Treaty establishing the Transport Community, marks an important milestone towards a more connected, resilient, and integrated transport network across the Western Balkans and beyond. This second edition of our Five-Year Rolling Plan not only highlights the progress made since 2022 but also sets out a vision for the region's transport sector and infrastructure network in the coming years. By aligning the Western Balkans' transport systems with EU standards, the region aims to achieve an important milestone in connectivity and policy harmonisation, laying the groundwork for a fully integrated transport network.

The revised TEN-T Regulation 1679/2024, which repealed and replaced Regulation 1315/2013, will play an essential role in enhancing environmental sustainability, safety, and resilience within the transport network. This new regulation introduces significant changes, including the establishment of the Western Balkans Eastern Mediterranean Core Corridor and Rhine Danube Core Corridor, alongside updated Key Performance Indicators (KPIs) that will guide infrastructure development across road, rail, and waterways. Meeting these standards will require a strengthened commitment to adopting EU legislation and taking advantage of new funding opportunities.

The Growth Plan for the Western Balkans provides additional momentum and financial support to realise this vision, offering the resources to transform the TEN-T network across the region. By leveraging these funds, regional partners have a unique opportunity to build transport infrastructure, reduce bottlenecks, and improve connectivity, thereby fostering economic resilience and encouraging sustainable development. To fully harness these benefits, all regional partners must align their efforts, ensure robust planning, and work collaboratively to deliver projects that meet TEN-T standards and timelines.

Our path forward is clear. By leveraging the funding opportunities provided by the Growth Plan, the Western Balkans can establish itself as an integral part of the European transport network. This commitment will deliver lasting improvements to connectivity, safety, and economic prosperity, benefitting citizens across the region. The decisions we make now will shape a more integrated, accessible, and resilient transport sector, supporting the region's growth and aligning it with the EU vision for a cohesive transport network.

Together, we can do more!

Executive Summary

1. **Significant progress has been made in recent years to develop the TEN-T Network in the region.** Currently, 54% of Core Network roads and 68% of Comprehensive Network roads meet basic TEN-T standards for infrastructure profile and condition. Railway compliance varies considerably across criteria. High compliance rates for electrification (65% Core, 55% Comprehensive) and freight axle load (84% Core, 73% Comprehensive) have been achieved. However, only 17% of the Core and 15% of the Comprehensive Network meet the operating speed standard, while ERTMS deployment is just 2.62%. In inland waterways, seaports and airports, TEN-T compliance rates are satisfactory, especially when compared with performance in other modes.

2. **However, there is still considerable work ahead and challenging deadlines to be observed.** Regulation 1679/2024 requires the Core Network to be completed by 2030 and the Extended Core Network by 2040, while the deadline for the Comprehensive Network is 2050. Overall, 46% of the Core Network and 32% of the Comprehensive network require various forms of upgrade. Lack of railway maintenance results in only 39% of the Core Network and 41% of the Comprehensive Network being currently in 'very good' to 'good' condition. Navigation on inland waterways, particularly on the Sava River, faces several critical points and segments requiring active measures. Compliance with key TEN-T standards such as alternative fuels deployment, ERTMS and train length needed to be developed from near-zero current compliance, while meeting certain criteria such as road safety, ITS, or tolling compliance requires acquis transposition and institutional reform.

3. **The region's current spending on TEN-T development is significant.** Under the Connectivity Agenda umbrella, substantial EU support has been channelled towards TEN-T projects since 2015. EU grants amounting to approx. € 1 billion leveraged additional investment of EUR 3.7 billion under the WBIF framework. The Regional Partners have also mobilised additional resources, approximately EUR 15.2 billion for ongoing TEN-T projects. Overall, financing is currently secured for a total of 72 TEN-T projects.

4. **Overall spending for TEN-T infrastructure development in the region is expected to remain high over the following years.** No less than EUR 9 billion in grant funding, potentially mobilising an additional EUR 20 billion in investment in the next decade, has been pledged under the Economic and Investment Plan for the Western Balkans. The EU's Growth Plan for the Western Balkans, adopted in November 2023, provides €6 billion in financial support to boost socio-economic reforms, investment, and alignment with the EU, paving the way for future membership.

5. **The projects have been prioritised and ranked based on a consistent methodology, mirroring the same strategic documents and principles across all Regional Partners.** SPPs are the result of a thorough screening, appraisal and prioritisation exercise that starts with project identification, followed by strategic relevance and quality/maturity assessment. Strategic relevance was assessed based on criteria such as demand/supply analysis, relation to other corridors/routes, safety or economic growth potential. A maturity assessment was conducted co concerning the quality and completeness of project documentation, to identify any possible gaps.

6. **Implementation of ongoing and mature projects is likely to result in significant improvements in TEN-T compliance rates by 2030.** Road Core Network compliance is expected to grow to 66% in 2027 and 89% in 2040. The compliance rate for the Comprehensive Network will also increase from 84% in 2027 to 98% in 2040. On railways, the compliance growth forecast for 2027 varies between criteria. Electrification is likely to be achieved for 71% of the Core Network and 61% of the Comprehensive Network. The already high axle load compliance will reach 84% on the Core and 74% on the Comprehensive, while ERTMS is expected to jump from 2.6 to 19%. Minimum operating speed compliance will also grow to 40% on Core and 32% on Comprehensive Network, which is expected to have a positive impact on rail transport competitiveness and attractiveness. In inland waterways, maintaining good navigation status will improve slightly with the implementation of dredging projects in critical sectors and the full deployment of River Information Services (RIS). For ports, establishing alternative fuelling facilities to enhance vessels' environmental performance is expected to reach 90% by 2040.

7. **However, despite the progress, full compliance with the Core Network will still not be achieved, even in a best-case scenario with all projects completed on time.** Besides the infrastructure profile and condition criterion (still not hitting 100%), road TEN-T standards include alternative fuels availability, ITS, tolling and safety compliance. The railway compliance forecast for train length, operating speed or ERTMS is particularly worrying, while no projects are currently addressing the availability of alternative fuels at either inland or maritime Core Network ports.

8. **Above and beyond infrastructure development, TEN-T compliance is also about policy reform and capacity development.** Regional Partners have committed to adopting the EU transport *acquis* in full, with Action Plans rolled out by the TCT entailing the highest-ranked priorities in this regard. EU *acquis* transposition is the first step towards achieving full compliance with certain TEN-T standards, but actual implementation also requires institutional and capacity building.

9. The **Next generation action plans** for railways, roads, road safety, transport facilitation, waterborne and multimodal transport present an ambitious reform roadmap that will magnify the benefits of infrastructure upgrades. They present a unique opportunity to accelerate the transposition of the EU *acquis* and intensify our reform efforts in the related transport policies. The plans contain concrete measures whose implementation would ensure the achievement of the core policy objectives contained in the Treaty.

10. **While the potential financial resources to be mobilised for TEN-T Network improvements are high, a financing gap nonetheless remains.** The estimated value of the projects currently in Regional Partners' portfolios largely exceeds the amount of financing available. Regional Partners' capacity to mobilise additional resources in this respect (mostly in the form of budget funding and commercial/3rd party loans) is also limited and uneven, as GDP/debt ratios in the region vary significantly.

11. **Revision of the TEN-T Regulation puts more focus on the green and digital transformation of the transport sector, and this will have to be mirrored by the Regional Partners.** The revised TEN-T Regulation places a stronger focus on green and digital transformation, which must be reflected by regional partners. Current TEN-T compliance rates and priority projects reveal an imbalance in transport modes, underscoring the need for increased investment in Intelligent Transport Systems (ITS), particularly the European Rail Traffic Management System (ERTMS), and alternative fuels for all modes of transport. ERTMS poses unique challenges due to varied technical and administrative requirements across regions. To address these gaps, single project pipelines should be updated to align with the Western Balkans' Smart and Sustainable Strategy, incorporating green and digital elements for greater sustainability.

    Dedicated funding schemes for small-scale interventions will be essential, targeting non-physical barrier removal, safety improvements, and the green and digital transformation of transport systems. In addition, support from the EU, the Transport Community Permanent Secretariat and International Financial Institutions (IFIs) will be vital to help the region make significant strides in transport decarbonisation. Building a skilled, well-prepared workforce will further enable regional partners to deploy ITS effectively, promoting smoother cross-border coordination and standardisation across all transport modes.

12. **EU-Western Balkans Green Lanes.** One of the most successful regional initiatives for Green Lanes is now becoming a prominent tool for transport facilitation between the region of Western Balkans and the immediate neighbouring EU Member States. The initiative brings added value to the infrastructure of cross-border connections between the Western Balkans and the EU, as it inter-connects the border agencies through a system for exchanging pre-arrival customs information (SEED+). Still, it also entails strong efforts for improvements and modernisation of the main border-crossing points (BCPs) located on the extended TEN-T Network.

Background

The signing of the Treaty establishing the Transport Community by six Southeast European Parties and the European Commission, representing the EU, has strengthened regional transport cooperation and accelerated reforms, reinforcing the region's European perspective. The Treaty commits the parties to create a Transport Community across road, rail, inland waterway, and maritime sectors by gradually adopting EU standards. Policy reforms focus on market liberalisation, removal of non-physical transport and trade barriers, and infrastructure development in line with the TEN-T Core and Comprehensive network extensions in the Western Balkans.

The institutional framework set up by the Treaty has been essential in achieving its political goals. Through the First and Next Generation Action Plans, the Permanent Secretariat of the Transport Community has driven the transposition of EU standards and reform in roads, railways, road safety, waterborne transport, multimodality, and transport facilitation. Approval and implementation of these Action Plans by the six Southeast European Parties have accelerated reform, marking a significant milestone in the region's European integration.

The commitment to develop TEN-T extensions, previously guided by the Connectivity Agenda under the Berlin Process, is now embedded in the Treaty. With unprecedented EU financial support, the recent Growth Plan and the Economic and Investment Plan for the Western Balkans affirm the EU's dedication to closing infrastructure and development gaps in the region.

The establishment of new Core Network Corridors, Extended Core Network, as well as the indicative extension of the TEN-T Core and Comprehensive Networks in Western Balkans as provided for by Regulation (EU) 1679/2024,1 is given below.

A key change under Regulation 1679/2024 is the establishment of the Western Balkan – Eastern Mediterranean Core Corridor (WBEM), along with enhancements to the Rhine-Danube Core Corridor. These routes are essential for both freight and passenger transport, supporting trade, mobility, and economic development in the region.

This expanded and upgraded WBEM corridor aims to strengthen connectivity between the Western Balkans and the European Union, supporting a more integrated and efficient trans-European transport network. The main figures about WBEM are presented below:

Corridor Overview	Details
Parties Involved	14 (8 EU Member States and 6 Western Balkans Partners)
Motorways	5,750 km
Railways	6,201 km
Seaports	20 locations
Airports	14 locations
Multimodal Freight Terminals	14 locations
Urban nodes	25 locations

The Rhine–Danube Core Corridor is a vital part of the Trans-European Transport Network (TEN-T), aimed at strengthening connectivity and economic integration across Europe. In Serbia, it includes two important rail and road sections and the full inland waterway network:

- Belgrade – Vršac: This section connects Belgrade to Vršac, leading toward the Romanian border and improving links between Serbia and Romania.

- Belgrade – Hungarian Border: Extending from Belgrade to Hungary's border, this section is shared by both the Rhine–Danube and Orient/East-Med Core Corridors. It plays a strategic role in enhancing transportation links between Central and South East Europe.

1 Regulation (EU) 1679/2024 repealed Regulation (EU) 1315/2013.

- The entire Inland Waterway Network, comprising the Danube, Sava, and Tisa Rivers, are an integral part of the Rhine–Danube Corridor. This corridor is a key trans-European transport route, facilitating efficient, multimodal connectivity between Central and Eastern Europe.

Figure 1. European Core Corridors

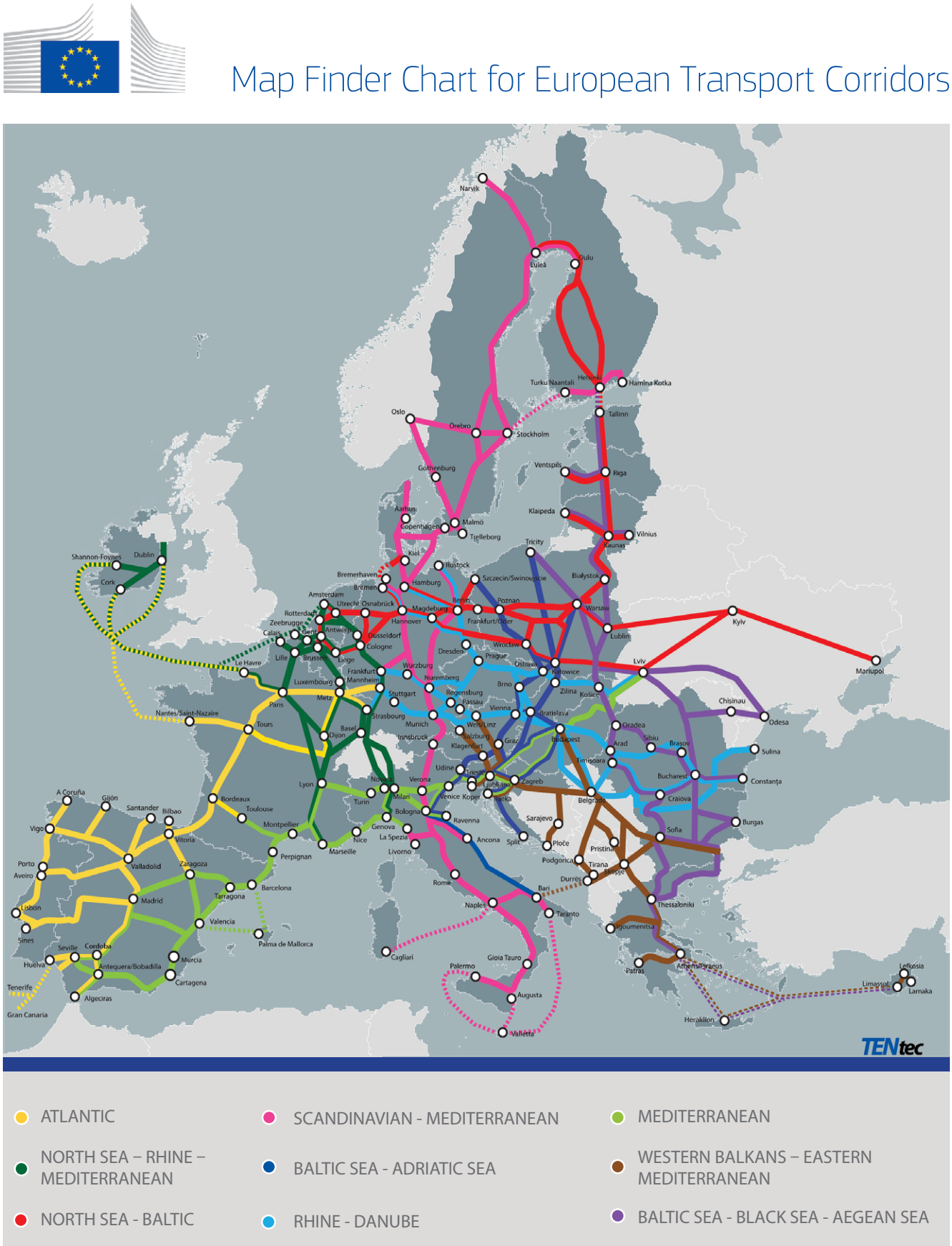


Figure 2. The indicative trans-European transport network (TEN-T) extension of Comprehensive and Core Networks to the Western Balkans

Comprehensive Network:
Railways and airports,

Core Network:
Railways (passengers) and airports

Comprehensive and Core Networks:
Roads, ports, rail-road terminals and airports

Comprehensive and Core Networks:
Inland Waterways and Ports

The Treaty includes dedicated provisions for the preparation and biannual revision of a strategic plan for developing the TEN-T network in the Western Balkans and identifying priority projects of regional interest (***the Five-year rolling work plan***). This plan should contribute to the region's sustainable development and improve connectivity between the South East European Parties and the EU while giving due consideration to the environmental and social dimensions.

Considering the requirements set out under the Treaty, the Permanent Secretariat of the Transport Community has coordinated work on the second edition of the five-year rolling work plan under the Treaty framework.

The preparation of the five-year rolling work plan was mainly based on the following:

- Main findings and conclusions of the TEN-T Annual Report as per The TEN-T compliance conditions and deadlines, as laid down by *Regulation 1679/2024, which repealed Regulation 1315/2013 of the European Parliament and of the Council of 11 December 2013 on Union guidelines for the development of the trans-European transport network and repealing Decision No 661/2010/EU;*

- The Economic and Investment Plan for the Western Balkans and its transport-related Flagship Projects;

- The priority TEN-T projects currently considered by each Regional Partner, as per the latest versions of their Single Project Pipelines.

The adopted methodology is based on a pre-defined project list and a gap analysis that identifies parts of the transport network that are non-compliant and not included in any strategic document. Since the analytical tools under the Transport Observatory framework are not yet operational, data remains limited, and no demand-forecasting analysis is available at the regional level.

Taking note of the above, drafting the 5-year rolling work plan entailed the following sequence of steps:

- Defining the strategic objectives of TEN-T network development (See Chapter 1);
- Summary presentation of the TEN-T network's current situation and compliance rate, as well as the evolution forecast for compliance indicators in currently ongoing and mature projects (Chapter 2);
- An overview of TEN-T Projects currently under consideration by the Regional Parties for future implementation, defining the highest-ranked priority projects and setting up future implementation milestones and actions. (Chapter 3);
- Gap Analysis (Chapter 4.)
- Transport policy initiatives and development (Chapter 5);
- Overall conclusions and recommendations (Chapter 6).

1. Strategic Objectives

To advance transport connectivity and integration within the Western Balkans and with the EU, a set of strategic objectives has been defined, supporting the implementation of Regulation (EU) 2024/1679. These objectives focus on meeting key TEN-T compliance standards, enhancing transport links, improving infrastructure, and facilitating policy reforms. The ultimate goal is to establish a cohesive, future-ready transport system that benefits the region's economic growth, regional cohesion, and environmental sustainability.

According to the latest TEN-T Annual Report, even if all currently financed projects are completed on time, overall progress is unlikely to meet the Regulation's deadlines fully. While additional funding and project developments are expected, it is increasingly clear that a realistic, effective TEN-T strategy for the region requires more than adherence to compliance indicators and timelines.

The key priority in the European integration process is to enhance connectivity within the Western Balkans and between the region and the EU, developing a regional transport market aligned with the EU acquis. Transport connectivity promotes economic growth and strengthens social and territorial cohesion, ultimately raising living standards. Therefore, a TEN-T strategy for the region should emphasise an integrated, multimodal transport network that prioritises corridor-based planning and investment, ensuring safer, climate-resilient, and digitally advanced connections.

The planning and prioritisation of TEN-T development in the Western Balkans should follow key principles already in place. The three-layer TEN-T framework assigns different priorities to the Core, Extended Core, and Comprehensive networks. With its flagship projects, the Economic and Investment Plan for the Western Balkans further narrows the focus to essential TEN-T links that promise significant connectivity gains for the region.

With the addition of the Western Balkans – Eastern Mediterranean Corridor and the Rhine – Danube Corridor, the region gains better access to EU markets, fostering greater integration. These upgrades will also prepare the region for future traffic growth, ensuring the resilience and longevity of its transport network.

To achieve the overarching goal of a fully integrated and modern transport network, the following strategic objectives should guide our priorities and actions. These objectives address the connectivity needs while fostering sustainable growth, economic integration, and alignment with EU standards. With these guiding objectives, we can set a clear path toward a transport system that meets both the region's unique requirements and the ambitions of the European Union:

- Enhancing connectivity within the Western Balkans and with the European Union. Building fast, high-quality connections among South East European partners and with the EU will foster closer relationships, promote economic integration, attract investments, and narrow the prosperity gap. Addressing existing bottlenecks and missing links will remain a key focus area for years to come.

- Improving accessibility and mobility on the TEN-T Network. Greater accessibility supports balanced regional development by enabling market access for remote or underdeveloped areas. Increased mobility yields clear economic benefits such as reduced travel times, shorter physical distances, and expanded opportunities for people and businesses. Although accessibility and mobility can sometimes be seen as competing goals in transport policy, the Western Balkans' unique transport system necessitates a careful balance between them.

- Building the transport of the future. Towards a smart, sustainable, green, safe and resilient TEN-T network. Western Balkans' Green Agenda and Sustainable and Smart Mobility Strategy are closely aligned with the European Union's vision of building a smart, sustainable, green, safe, and resilient TEN-T network. This integrated vision focuses on reducing transport's environmental impact, supporting a shift towards greener modes such as rail and waterborne transport, and decarbonising road transport. Digitalisation plays a crucial role, enabling seamless, intermodal transport through large-scale investments and smaller, smart interventions to boost network efficiency and support non-polluting modes operating at full potential. Transport safety is also a critical priority, addressed through policy measures and infrastructure improvements that aim to lower accident rates and enhance safety across the TEN-T Network. Together, these efforts are shaping a future-ready, cohesive transport system that meets the EU's climate and connectivity goals.

- EU *acquis* implementation and associated policy reforms. Achieving TEN-T compliance goes beyond infrastructure upgrades; it also demands substantial policy and institutional reforms in areas like road safety, Intelligent Transport Systems (ITS), user charges, and the European Rail Traffic Management System (ERTMS). Legislative and institutional adjustments are necessary in these fields, and soft measures for cross-border transport facilitation can yield significant economic benefits—such as time and vehicle operating cost savings—often at a fraction of the cost of major infrastructure projects.

  The ultimate goal of the Transport Community Treaty is to establish a unified transport market, which depends on adopting the relevant acquis outlined in Annex I. This includes implementing technical standards, interoperability, safety and security protocols, traffic management, social policy, public procurement, and environmental regulations across all transport modes (excluding air transport).

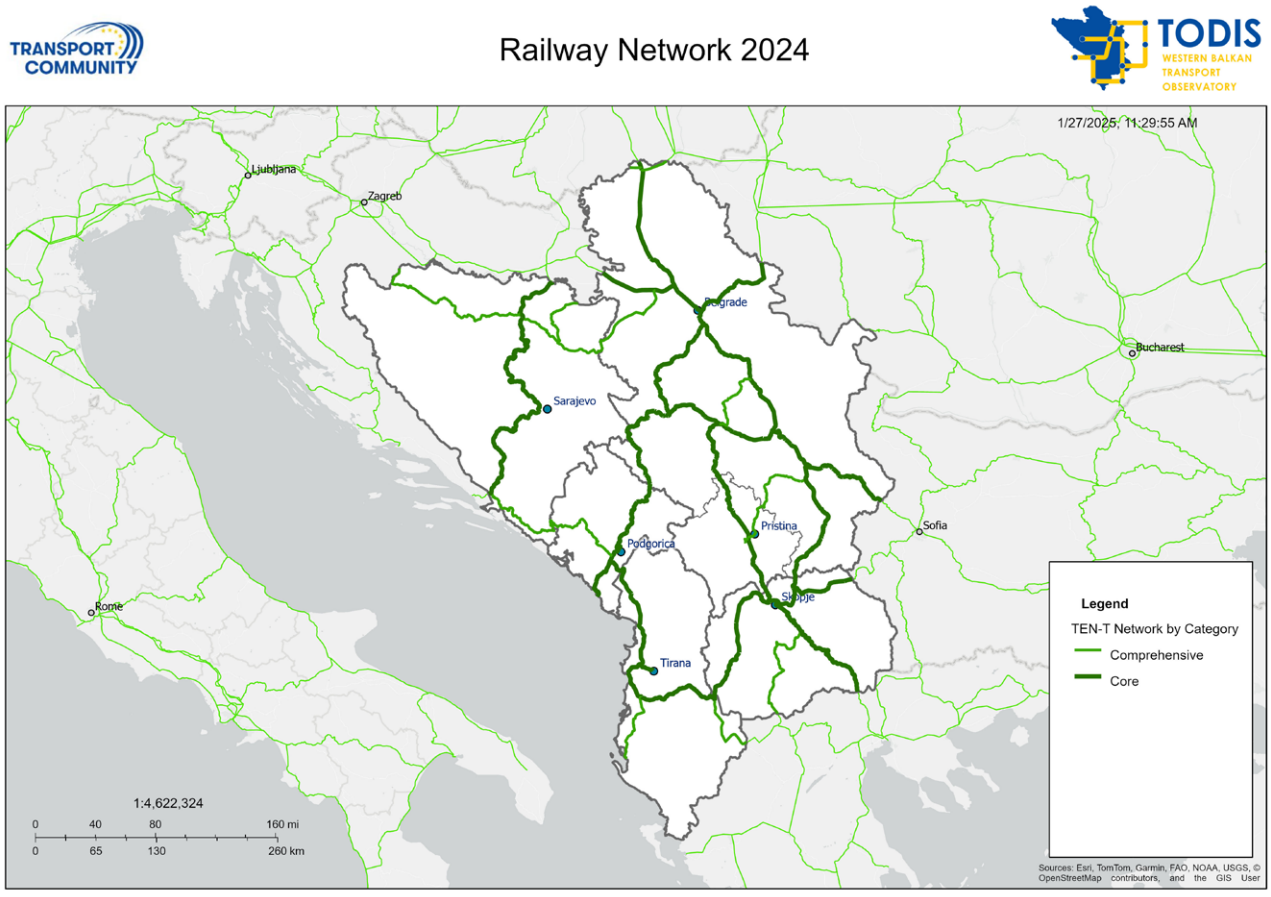
2. TEN-T Infrastructure Development Overview

This chapter outlines the progress made in advancing the planned extension of the TEN-T network throughout the Western Balkans. The current update is based on data from the 2024 Annual Report on TEN-T Network Development, which was approved by the Regional Steering Committee in December 2024. This report details the accomplishments and the remaining efforts required to bring the region's infrastructure closer in line with EU standards, ultimately fostering enhanced connectivity and economic integration with the European Union.

2.1. Railways

The TEN-T railway network is structured into four layers: the Core Network Corridors, the Extended Core Network, the Core Network, and the Comprehensive Network. The combined length of these layers totals 4,293 km (Comprehensive Network), with 3,006 km falling within the Core Network.

Figure 3. Indicative extension of the TEN-T Core and Comprehensive Railways Network to the Western Balkans



In 2024, the EU replaced Regulation 1315/2013 with Regulation 1679/2024, which will guide the next update of the Five-Year Rolling Plan. However, due to the data collection timeline, this report assesses compliance based on the previous regulation's six requirements rather than the twelve updated criteria introduced in Regulation 1679/2024.

The new Regulation establishes a detailed, long-term strategy for creating a unified trans-European transport network (TEN-T), covering all transportation modes with an emphasis on rail. It sets technical standards, prioritises infrastructure interoperability, and identifies core TEN-T development priorities.

Regarding infrastructure requirements, the updated Regulation introduces specific criteria, including provisions for freight terminals, implementation of the European Rail Traffic Management System (ERTMS), adherence to Technical Specifications for Interoperability (TSI), network electrification, and accessibility to freight terminals. It also defines essential conditions for railway infrastructure compliance:

- deploying ERTMS;
- migrating to a 1,435 mm nominal track gauge;
- mitigating the impact of noise and vibration caused by rail transport, in particular through measures for rolling stock and infrastructure, including noise protection barriers;
- meeting infrastructure requirements and enhancing interoperability;
- improving the safety of level crossings;
- where appropriate, connecting railway transport infrastructure with inland waterway port infrastructure.

In addition to introducing new compliance indicators, Regulation 1679/2024 has also expanded the TEN-T network in the region. Compliance assessments will focus on existing lines within these networks. Thus, 397 km of the Comprehensive Network and 124 km of the Core Network (representing missing links) are excluded from this assessment.

These are sections:

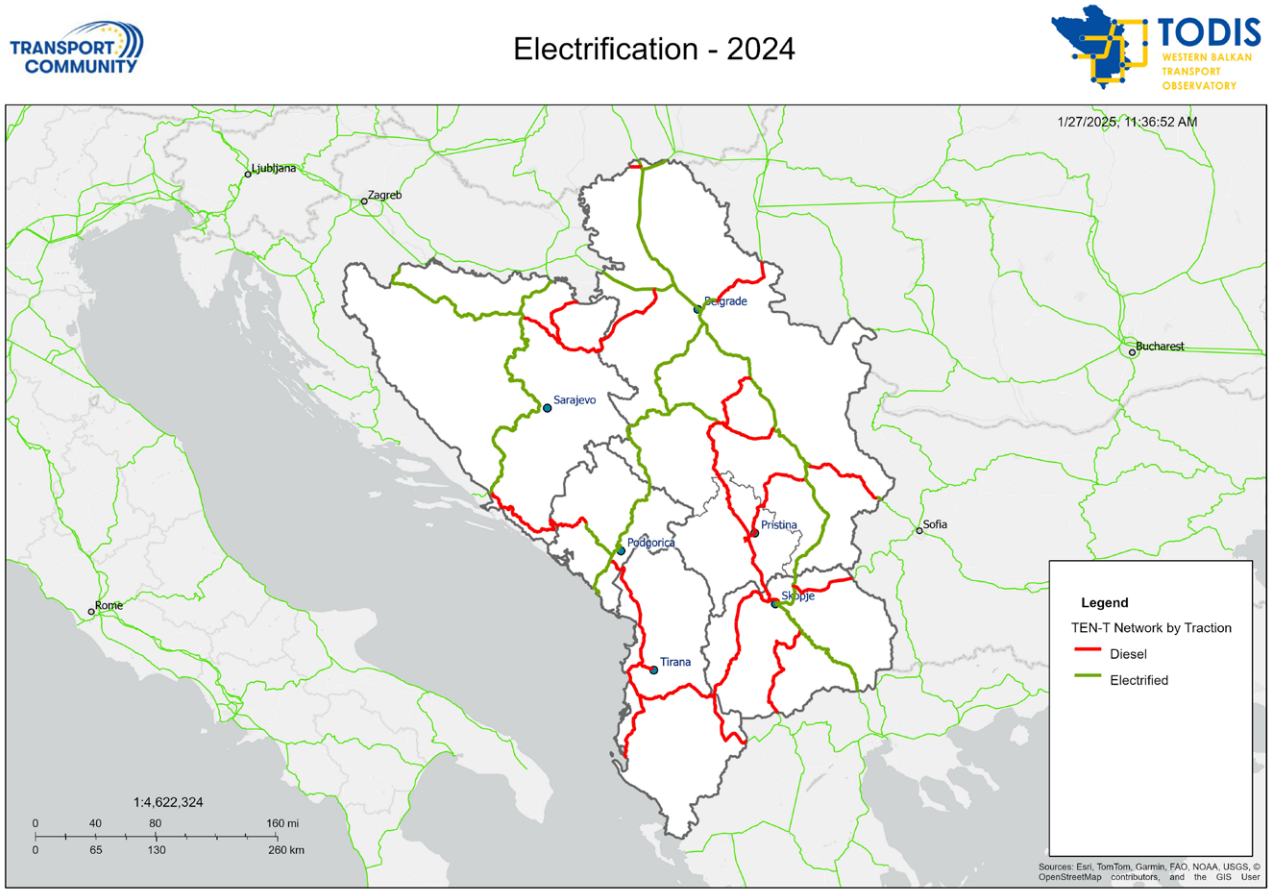
- Pogradec – Korca in Albania – 88 km - Comprehensive
- Niksic (MNE) – border with Bosnia and Herzegovina – 60 km - Comprehensive
- Capljina (BIH) – border with Montenegro – 110 km - Comprehensive
- Kicevo (MKD) – Lin (ALB) – 60 km - Core
- Beljakovce - Kriva Palanka – border with Bulgaria – 64 km - Core
- Subotica (SRB) – HU border (towards Baja) – 15 km - Comprehensive

The existing transport infrastructure requirements contained in the repealed Regulation (EU) No 1315/2013 are the following:

- Electrification - railways network to be electrified by 2030 (including sidings where necessary);
- Axle load: Freight lines 22.5 t axle load by 2030.
- Line speed: Freight lines must allow 100 km/h by 2030 (no speed requirement for passenger lines);
- Train length: Freight lines to allow for 740 m trains by 2030;
- Track gauge: Nominal track gauge for new railway lines 1.435 mm;
- European Railway Train Management System (ERTMS) / signalling system: Core network to be equipped with ERTMS by 2030.

Railway **electrification** compliance of the operational network is already **65.09% on the Core and 55.34% on the Comprehensive Network**. Certain parts of the networks, mainly in **Albania**, **North Macedonia**, **Montenegro** and **Bosnia and Herzegovina**, are still in preparation for the construction phase and are not part of this report.

Figure 4. Map of Electrified lines



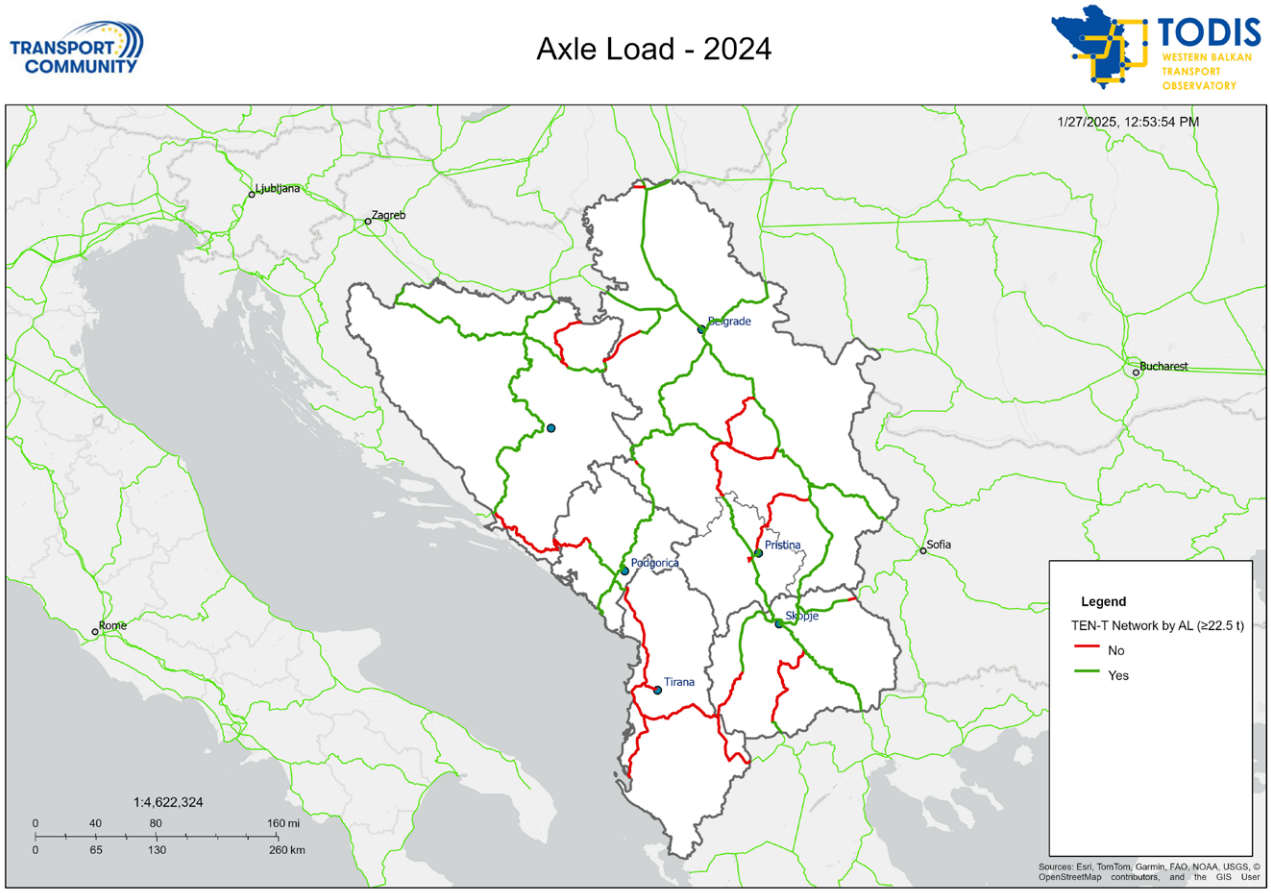
For **freight axle load**, the compliance parameter of 22.5 t per axle is already at **83.88% on Core and 73.49% on Comprehensive Network** as per 2024 data. The deficiencies are in **Albania, North Macedonia, Kosovo and Bosnia and Herzegovina,** mainly due to poor maintenance.

For **freight line design speed, 60.32% of the Core network** is compliant with the parameter of 100 or more km/h as per 2024 data and **58.98% on the Comprehensive network**. In **operational speed**, **only 17.24% of the operational Core network** and **14.53% of the Comprehensive Network** have an operational speed of more than 100 km/h. The deficiencies are mainly in **Albania, Montenegro, Serbia, Kosovo** and **Bosnia and Herzegovina**.

Regarding **the freight train length parameter**, a notable shift has occurred, with **15.89% of the Core network** and **14.66%** of the **Comprehensive network** now complying with the requirement for accepting 740 meters or longer trains. This marks a substantial improvement from the previous year, but it is a result of the data collection process rather than works on infrastructure. The region mainly meets the 500 m parameter. This, however, needs to be read with the above caveats, which state that the situation continues to improve and that there are differences here and there between nominal compliance and actual operational possibilities. For example, a line may be fit for 740 m trains but does not have enough sidings to turn that possibility into operational reality.

The railway track gauge is already compliant at a **maximum of 100%** as per 2024 data. The situation has been the same for many years and does not affect interoperability.

Figure 5. Map of Axle load per line

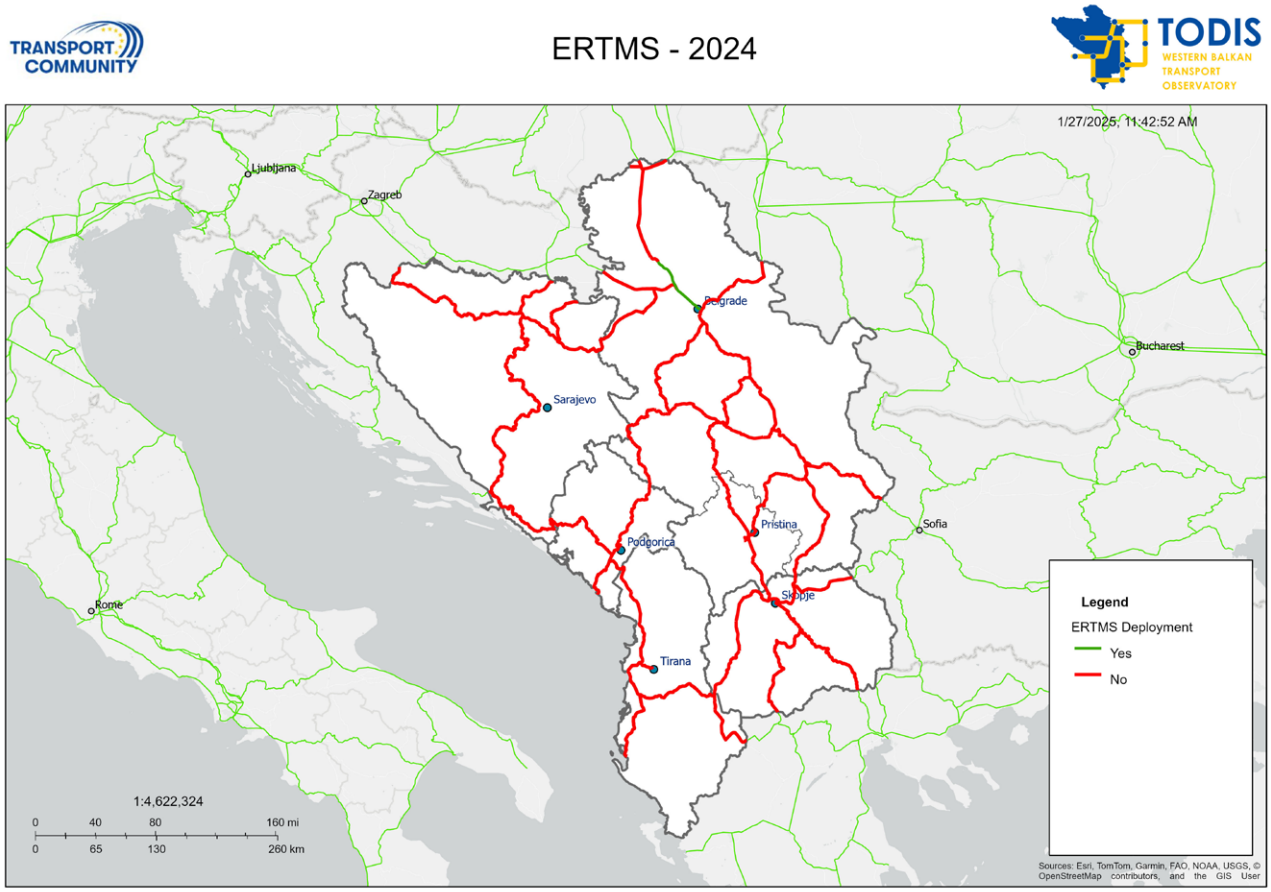


Finally, **ERTMS** system operations have been rolled out in the Western Balkans. For the first time in history, **2.20% of the Core** and **1.63% of the Comprehensive Network** is equipped with an ERTMS system due to the opening of the newly reconstructed Belgrade – Novi Sad line. The second section, equipped with ERTMS, from Novi Sad towards Subotica and HU border, should be completed by the end of 2024.

Ongoing and planned projects, as highlighted in the TEN-T Annual Report, reveal intentions to implement the European Train Control System (ETCS) Level 1 or 2 in Albania, Serbia, and North Macedonia. However, these plans do not yet cover the entire Core Network or even the majority of it, highlighting the critical need to intensify efforts for comprehensive ERTMS implementation across the region.

Furthermore, the newly established Western Balkan–Eastern Mediterranean Corridor is expected to attract additional investment and users, adding to the importance of ensuring full TEN-T compliance along this route. Implementing ERTMS involves more than merely procuring and installing equipment; European experience shows that extensive capacity building in railway systems is also essential to ensure effective operation and maximise the system's benefits.

Figure 6. Map of ERTMS implementation

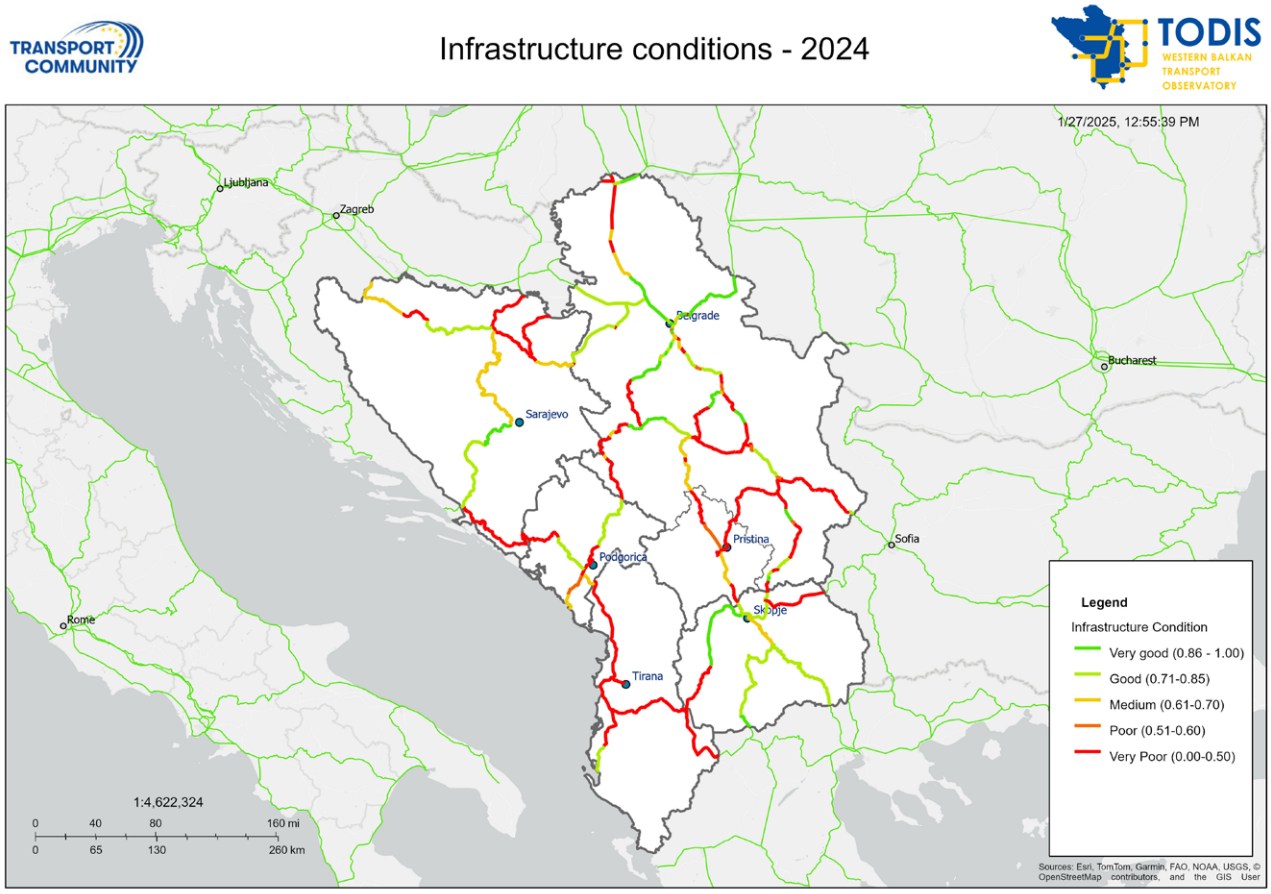


The network's current condition was assessed using data provided by Regional Partners on the state of their railway tracks. For clarity, conditions were categorised into five groups based on the current maximum operational speed ratio to the network's maximum designed speed. This approach offers a more detailed picture of the railways' current state.

As for the **infrastructure condition**, **39% of the Core Railway Network and 41% of the Comprehensive are reported to be in very good and good condition**, where approximately 70-100% of the designed speed can be achieved. Approximately 15% of the sections are reported to be in average condition, with wide variations in the maximum allowed speed.

The **greater part of the Core (46%) and Comprehensive Network (45%) is in poor or very poor condition, where the designed speed averages only 50%.** An important issue that should be mentioned is the system's reliability for assessing the condition. Several sections showed a large discrepancy between the reported condition, design and maximum allowed speed. Furthermore, several different systems seem to be in use for assessing conditions in different Regional Partners.

Figure 7. Railway infrastructure condition map



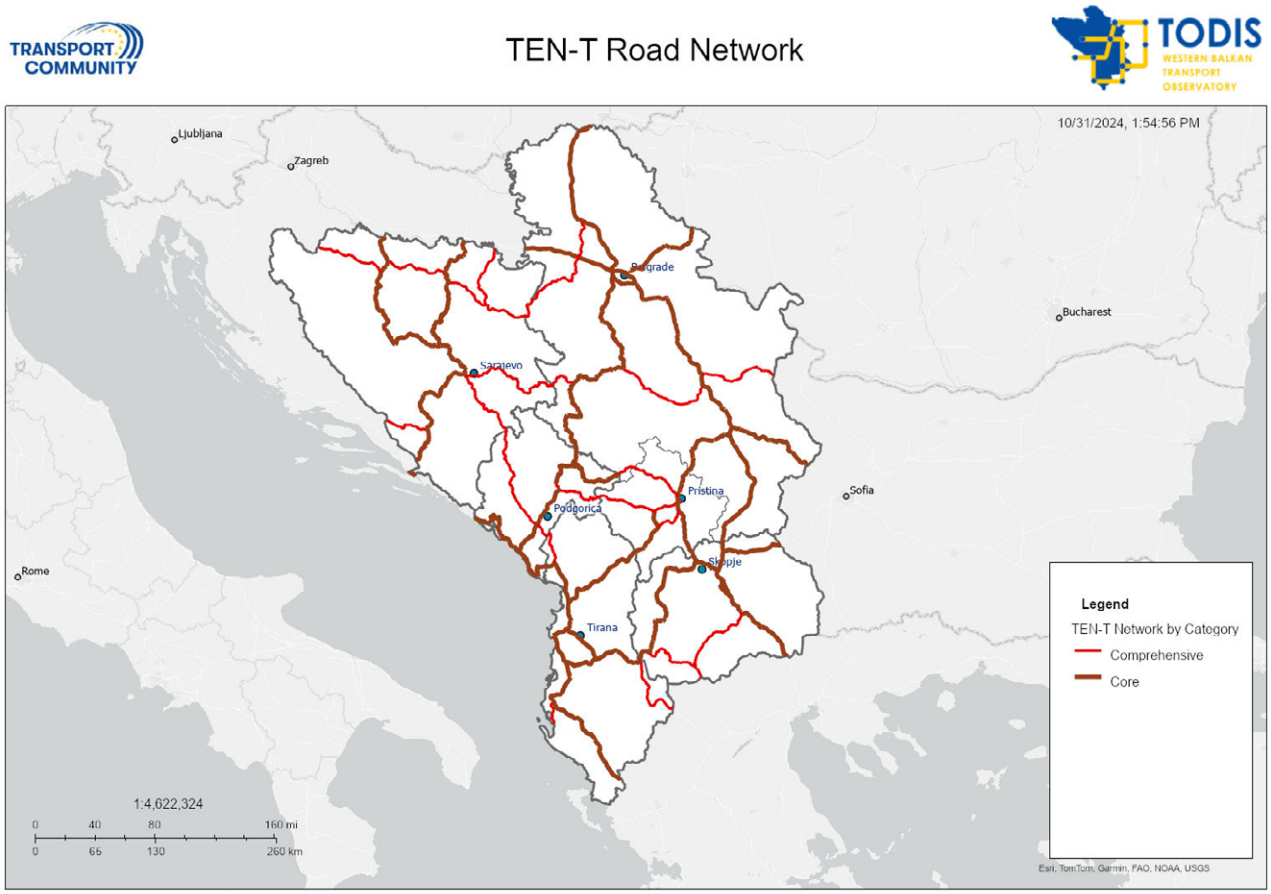
2.2. **Roads**

In July 2024, Regulation 1315/2013 was repealed and replaced by Regulation 1679/2024. However, due to the timing of data collection, the 2024 compliance assessment is still based on the requirements of the previous regulation, focusing on road categories and conditions. The new regulation will form the basis of the 2025 annual TEN-T compliance assessment.

The total length of the TEN-T road network in the Western Balkans is **5,593 km**, of which **3,373 km** are on the Core Network, and **2019.8 km** are Comprehensive network after the modifications of the network.

The network's current layout is given below.

Figure 8. Indicative Extension of TEN-T Core and Comprehensive Road Network to the Western Balkans



Road infrastructure components are listed under Art.17 of the TEN-T Regulation[2]. Art. 18 further defines compliance requirements, while development priorities are dealt with under Art. 19.

The TEN-T road network is deemed to include high-quality roads (motorways, expressways, or conventional strategic roads) specially designed and built for motor traffic with adequate levels of safety.

Based on the findings of the TCT Secretariat's Annual Report on the Development of the indicative TEN-T extension of the Core and Comprehensive Network to the Western Balkans, **54% of the Core Network and 68% of the Comprehensive network are compliant with TEN-T standards related to infrastructure profile and conditions**, as provided below.

2 Source: https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=COM%3A2021%3A812%3AFIN

Figure 9. Core and Comprehensive Compliance Rate (infrastructure and profile) 2021 - 2024

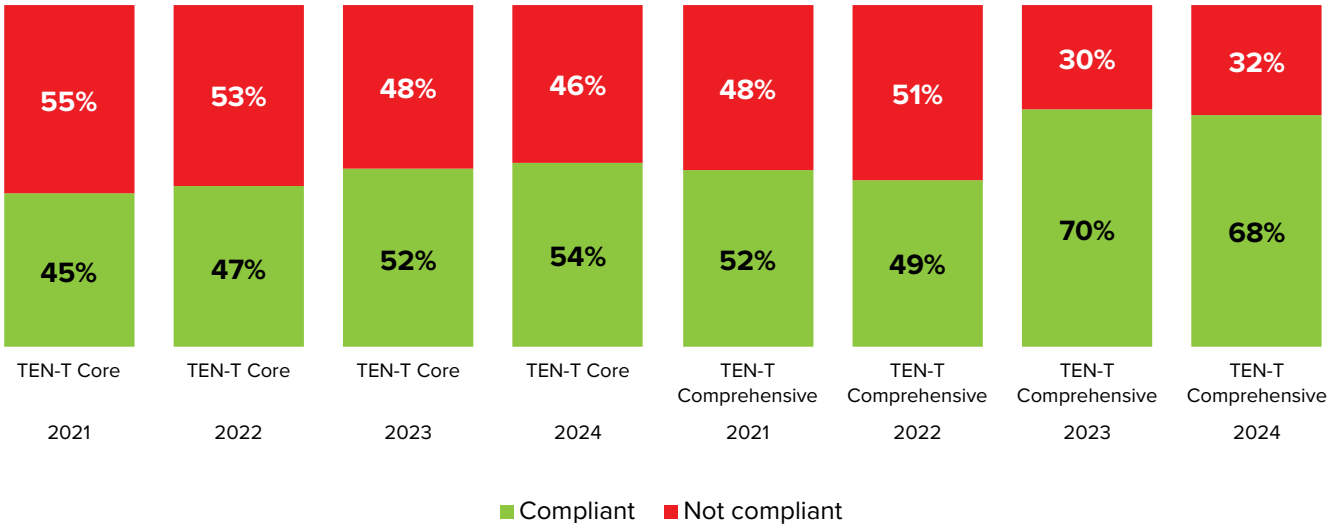
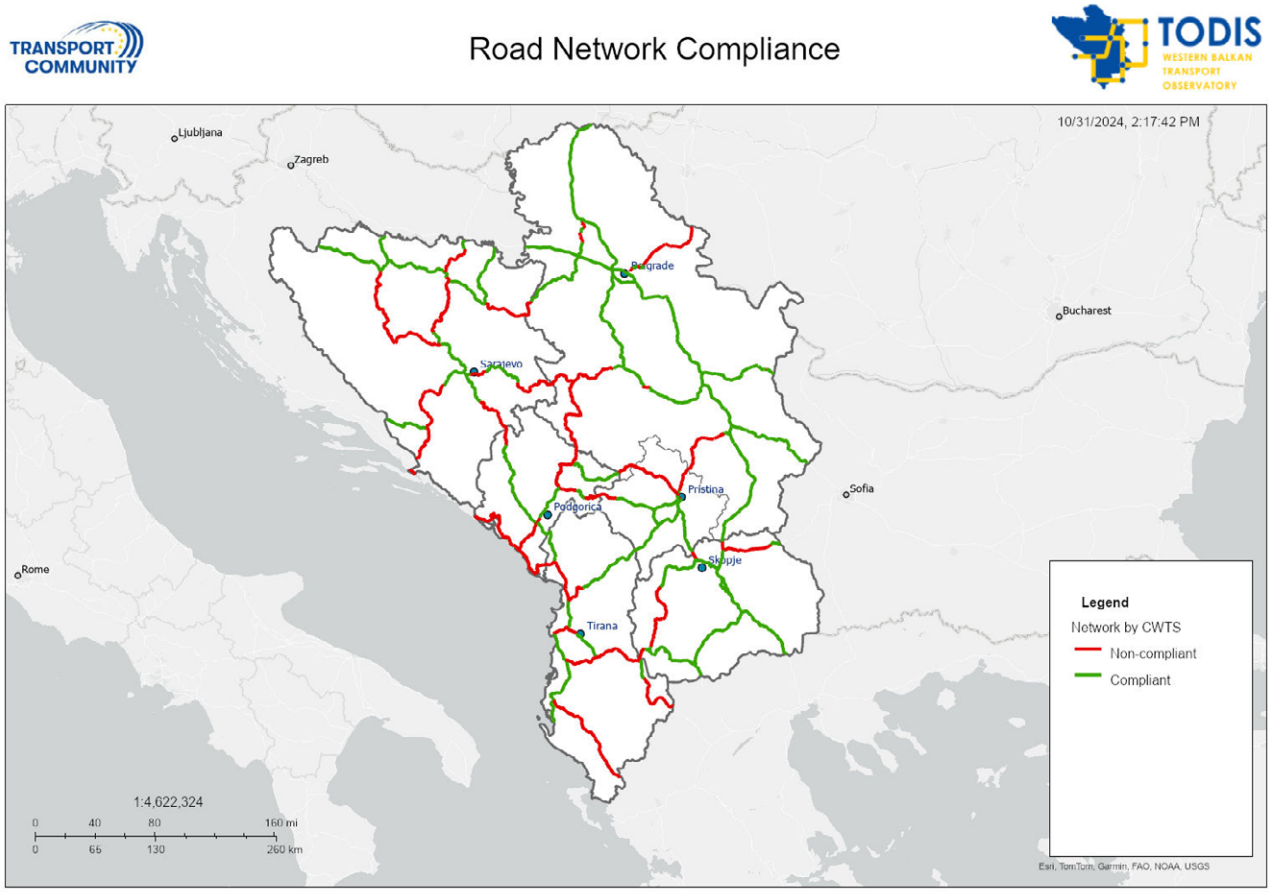


Figure 10. Road network compliance map - 2024



Since the first monitoring exercise in 2021, TEN-T compliance in the road sector has increased substantially on both the Core and the Comprehensive Network. Such an outcome primarily reflects the completion of ongoing projects. It should also be noted that almost none of the regional partners conduct annual road surface quality surveys, meaning that annual TEN-T Reports might not provide real-time updates on changes on the ground.

Compliance with the provisions of EU Directives on road tunnels, tolling interoperability and ITS should also be ensured. Additional conditions are imposed for the Core network, namely:

- Stricter application of road profile requirements (except for some clearly defined situations, roads should be either motorways or expressways);
- Development of rest areas on highways approximately every 100 km;
- Availability of alternative fuels.

Overall compliance with ITS, tolling and safety directives have been separately dealt with, given structural/ institutional reforms currently being addressed under the dedicated Action Plans of the Transport Community Permanent Secretariat. Progress will be presented in a policy-related chapter in this document.

However, **road maintenance must be more systematic and performance-oriented** to ensure asset preservation and proper road surface condition. Proper maintenance policies are identified as a priority and included in the Road Action Plan[3]. Their proper implementation, backed by adequate funding, will be instrumental in ensuring long-term compliance with TEN-T standards in the region.

There has been no significant progress in achieving compliance for the **deployment of alternative fuels** in the Western Balkans. More effort will be required to ensure adequate deployment of alternative fuels infrastructure, identified as a priority and included in the Road Action Plan. Reaching TEN-T compliance standards will, therefore, require **systematic and target-oriented public intervention**, to be undertaken within the framework provided by the Alternative Fuels Infrastructure Directive.

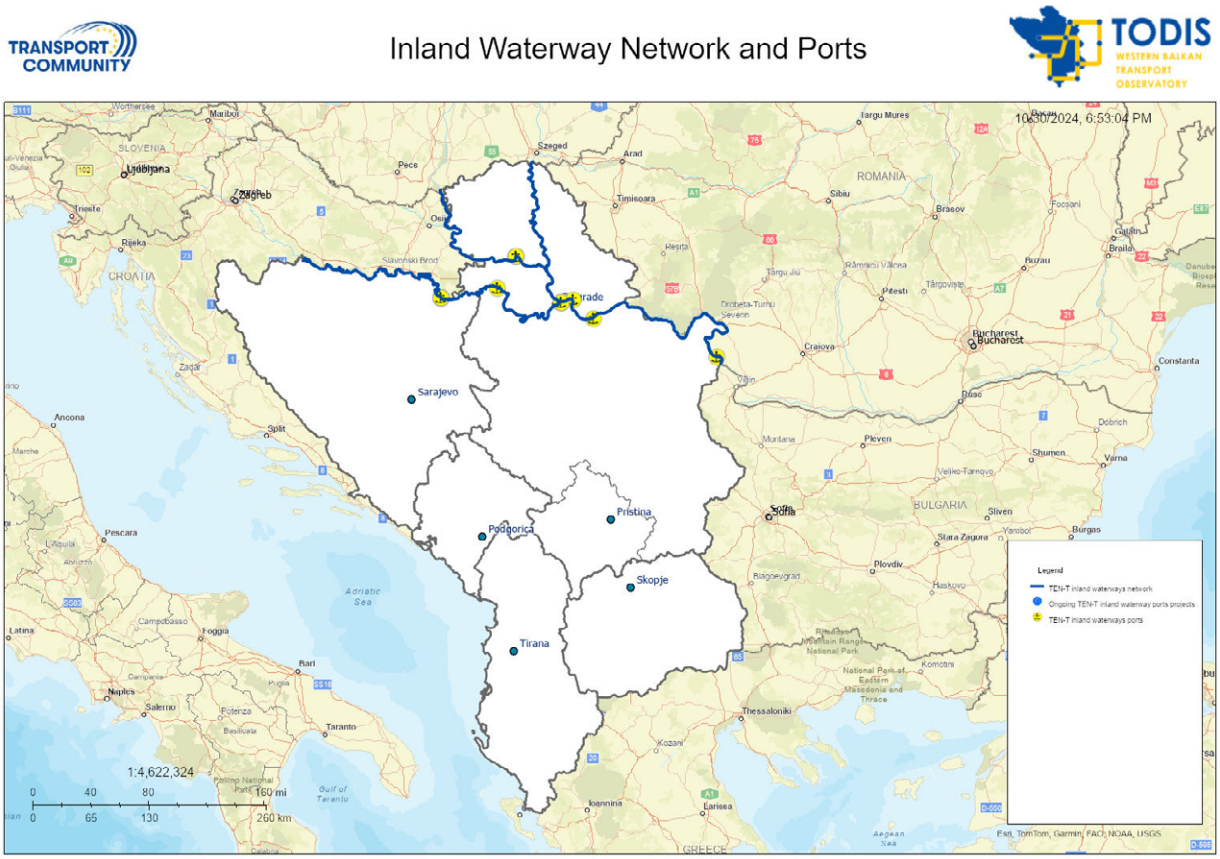
The alternative fuels network in the Western Balkans is largely undeveloped, with most of the existing stations being set up by private investors with a bottom-up approach. Following market demand, refuelling stations are mostly located in the region's largest cities. At the same time, deployment on the TEN-T Network is close to zero (given the low penetration rate of alternative fuel vehicles in the region). Only a few alternative fuels stations are located on TEN-T, and 18 electrical re-charging stations are deployed on Corridor X in Serbia.

3 Source: https://www.transport-community.org/wp-content/uploads/2020/11/Road-Action-Plan.pdf

2.3. **Inland waterways**

The Indicative Extension of the TEN-T Core and Comprehensive Networks to the Western Balkans strengthens regional connectivity and trade by integrating key inland waterways and ports. The Danube, Sava, and Tisa Rivers serve as essential segments of the Rhine-Danube Corridor, promoting economic growth, efficient logistics, and sustainable multimodal transport. The total length of the Inland Waterway in the Region for the three rivers is 1259 km. Major inland waterway ports of the Extension TEN-T Network, such as Novi Sad and Belgrade in Serbia, along with Ports of Brčko and Bosanski Šamac in Bosnia and Herzegovina, enhance the region's capacity for waterborne transport and facilitate connectivity with the European Union's broader transport network.

Figure 11. Map of Indicative extension of TEN-T Inland Waterway Network and Ports



Compliance Indicators for Indicative extension of TEN-T Core Inland Waterways

As stipulated in the TEN-T Regulation, the compliance indicators for waterways in the Western Balkans encompass infrastructure requirements vital for achieving efficient transport standards. These include:

- **Maintenance of Good Navigation Status:** Minimum Class IV with:
  - draft of at least 2.5 meters and
  - bridge clearance of 5.25 meters.
- Locks: Maintenance to minimise waiting times.
- River Information Services (RIS): Full deployment to optimise navigational safety and efficiency.

Compliance assessment of TEN-T Core Inland Waterways Network in the Western Balkans

The TEN-T Core Inland Waterways Network in the Western Balkans, as part of the Indicative Extension of the EU's TEN-T Core and Comprehensive Networks, plays an essential role in strengthening regional connectivity, trade, and multimodal transport. As a key segment of the **Rhine-Danube Corridor**, the network includes the **Danube**, **Sava**, and **Tisa** rivers, which serve as major routes for goods and passengers. By linking the Western Balkans to the EU's transport infrastructure, these waterways support economic growth, efficient logistics, and the shift toward greener transport solutions.

The compliance assessment of each river is as follows:

Danube River

The Danube River is divided into two important segments:

- **The confluence of Timok River** to **Belgrade** (324.5 km) meets the criteria for CEMT **Class VII**, supporting vessels with a draft of up to 4.5 meters and bridge clearance of 9.1 meters.
- **Belgrade to Bezdan** (263 km) meets the criteria for CEMT Class **VIc**, offering similar specifications with a 200-meter maximum convoy length.

It is essential to highlight that the River Information Service (RIS) is fully deployed and operational along the entire segment of the Danube River.

Sava River

- From Sava Mouth (km 0) to Kamičak (km 81), it achieves **Class Va.**
- From Kamičak (km 81) to Rača (km 176), is classified as **Class IV,**
- From Rača (km 176) and Domuskela (km 196), the classification decreases to **Class III,**
- Beyond Domuskela (km 196) to Šamac (km 313.7), the river returns to **Class IV**
- From Šamac (km 313.7) to Rit Kanal (km 338.2), it decreases to **Class III**
- From Rit Kanal (km 338.2) to Brod (km 371.2), the river meets **Class IV** standards,
- From Brod (km 371.2) and beyond, the river classification is **Class III.**

These varying classifications underscore the need for targeted enhancements to establish consistent Class IV or higher status along the entire Sava River. Upgrading the remaining Class III sections to Class IV would align the river with TEN-T compliance standards, thus facilitating seamless, efficient inland waterway transport and contributing to regional economic integration and sustainability.

The River Information Service (RIS) in Sava River is fully deployed and operational.

Tisa River

Although the Tisa River in Serbia meets the CEMT **Class IV** classification, it currently lacks an established River Information Service (RIS) infrastructure, essential for supporting safe, efficient, and environmentally friendly inland navigation.

Compliance Indicators for Indicative extension of TEN-T inland waterway ports

- **Connectivity**: Links with railway lines, roads, and, where feasible, inland waterways.
- **Multimodal Terminal Access**: At least one freight terminal available to all operators in a transparent, non-discriminatory manner.
- **Environmental Facilities**: Infrastructure for improving ships' environmental performance, such as waste reception facilities.
- **Alternative Fuels Infrastructure**: Availability of alternative fuelling stations.

Indicative extension of TEN-T Core and Comprehensive Inland Waterways ports

In 2024, the EU replaced Regulation 1315/2013 with Regulation 1679/2024, which will be the basis of the next Five-Year Rolling Plan. With Regulation 1315/2013, the **Core Indicative Extension** of the **TEN-T Network** incorporated several important inland waterway ports, which are the ports of **Novi Sad** and **Belgrade** along the **Danube River** in Serbia, as well as **Brčko** and **Bosanski Šamac** on the **Sava River** in Bosnia and Herzegovina.

The new TEN-T Regulation 1679/2024 introduced updates to the TEN-T Comprehensive and Core Networks, which fall into the extension of four new inland waterway ports new requirements and KPIs. This report will focus on describing the network changes, while the newly introduced KPIs will be applied in next year's assessment. The new ports are in Serbia as follows:

Port of Pančevo, as Core Network Port, located at 1,153 km of the Danube River.

While the new port part of the Comprehensive TEN-T Network are:

1. **Port of Sremska Mitrovica**, located in the Sava River, 133 km from the mouth of the Danube River.
2. **Ports of Smederevo,** located along the Danube River, from the 1,111 to the 1,116th km, and
3. **Port of Prahovo,** located on the Danube River, at the border of Serbia, Romania, and Bulgaria.

The compliance assessment of the TEN-T Core Inland Waterways ports

The TEN-T Network Core inland waterway ports within the extended TEN-T network in the Western Balkans continue to meet all requirements except for alternative fuels availability and facilities for improvement of the environmental performance of the vessels. All the ports are fully complying with the connection with rail, except the Port of Belgrade, which has only a road connection.

The network's current layout regarding the TEN-T extension to Inland Waterway and ports in the Western Balkans is presented below.

Table 1. Compliance assessment for Indicative extension of TEN-T Core inland ports

Port name	Regional Partner	Rail connection	Road connection	CEMT Requirements	Alternative fuels availability	Multimodal Terminal availability	Environmental Facilities
Belgrade	**Serbia**	No	Yes	Yes	No	Yes	No
Novi Sad		Yes	Yes	Yes	No	Yes	No
Pančevo		Yes	Yes	Yes	No	Yes	No
Brcko	**Bosnia and Herzegovina**	Yes	Yes	Yes	No	Yes	No
Bosanski Samac		Yes	Yes	Yes	No	Yes	No

The compliance assessment of the TEN-T Comprehensive Inland Waterways ports

When related to the compliance indicators of the comprehensive inland waterway ports, all three ports have maintained compliance with the requirements related to road connection, terminal availability and CEMT requirements. The ports of Sremska Mitrovica and Prahovo are connected fully to rail infrastructure, while the port of Smederevo is partly connected by rail. None of the ports comply with Clean Fuel availability requirements and facilities for improvement of the environmental performance of the vessels.

Table 2. Compliance assessment for TEN-T Comprehensive inland ports

Port name	Rail connection	Road connection	CEMT Requirements	Clean fuels availability	Terminal availability	Environmental Facilities
Sremska Mitrovica	Yes	Yes	Yes	No	Yes	No
Smederevo	Partially	Yes	Yes	No	Yes	No
Prahovo	Yes	Yes	Yes	No	Yes	No

2.4. Maritime transport

The extended TEN-T Network underscores the strategic importance of Core Network Ports in the Adriatic, particularly the Ports of Bar in Montenegro and Durrës in Albania. These ports serve as vital maritime gateways, linking the Western Balkans to European markets. Additionally, the Port of Vlorë in southern Albania, part of the Comprehensive Network, plays an essential role in the region's trade dynamics.

Compliance Indicators for Core and Comprehensive Maritime Ports

The TEN-T Regulation defines compliance indicators for ports to ensure accessibility, environmental performance, and digital readiness. Core and Comprehensive maritime ports are expected to meet the following indicators:

- **Connectivity**: Links with railway lines, roads, and, where feasible, inland waterways.
- **Multimodal Terminal Access**: At least one freight terminal available to all operators in a transparent, non-discriminatory manner.
- **Environmental Facilities**: Infrastructure for improving ships' environmental performance, such as waste reception facilities.
- **Alternative Fuels Infrastructure**: Availability of alternative fuelling stations.
- **Telematics Applications**: Deployment of systems like VTMIS, SafeSeaNet, and Maritime National Single Window (MNSW).

Core Port of Durres

The Port of Durres shows full compliance with most of the TEN-T indicators, except for rail connectivity, which is partly because only the eastern terminal is connected to the road network and partially with the national rail network. Regarding telematics, Albania is finalising the process to implement the Vessel Traffic Monitoring and Information System (VTMIS), which will strengthen the implementation of the Maritime National Single Window (MNSW) to be fully operable. The Albanian government has initiated the implementation of a strategic plan to convert the actual Port of Durres into a tourist port, and a new port will be constructed approximately 12 kilometres north of the current port in Porto Romano.

Core Port of Bar

The Port of Bar JSC meets several key compliance indicators, including connectivity via road and rail, ship-generated waste facilities, and terminal availability. Additionally, Bar has implemented VTMIS, and Montenegro recently launched the Maritime National Single Window (MNSW) in 2024. The port is now integrating MNSW with its Port Community System (PCS), advancing digital infrastructure for efficient operations.

Table 3. Compliance indicators of the Core Maritime Ports

Port name	Rail connection	Road connection	Environment infrastructure	Alternative fuel infrastructure	Terminal availability	VTMIS	MNSW
Durres	Partially	Yes	Yes	No	Yes	No	Partially
Bar	Yes	Yes	Yes	No	Yes	Yes	Yes

Comprehensive Port of Vlora

The Port of Vlora is the only Comprehensive maritime port in the Western Balkans, with its 2024 compliance status summarised below. The port complies with several critical indicators, such as ship-generated waste facilities, road connectivity, and terminal availability. However, it currently does not comply with the rail connection and VTMIS indicators.

Table 4. Compliance indicators of the Comprehensive Maritime Ports

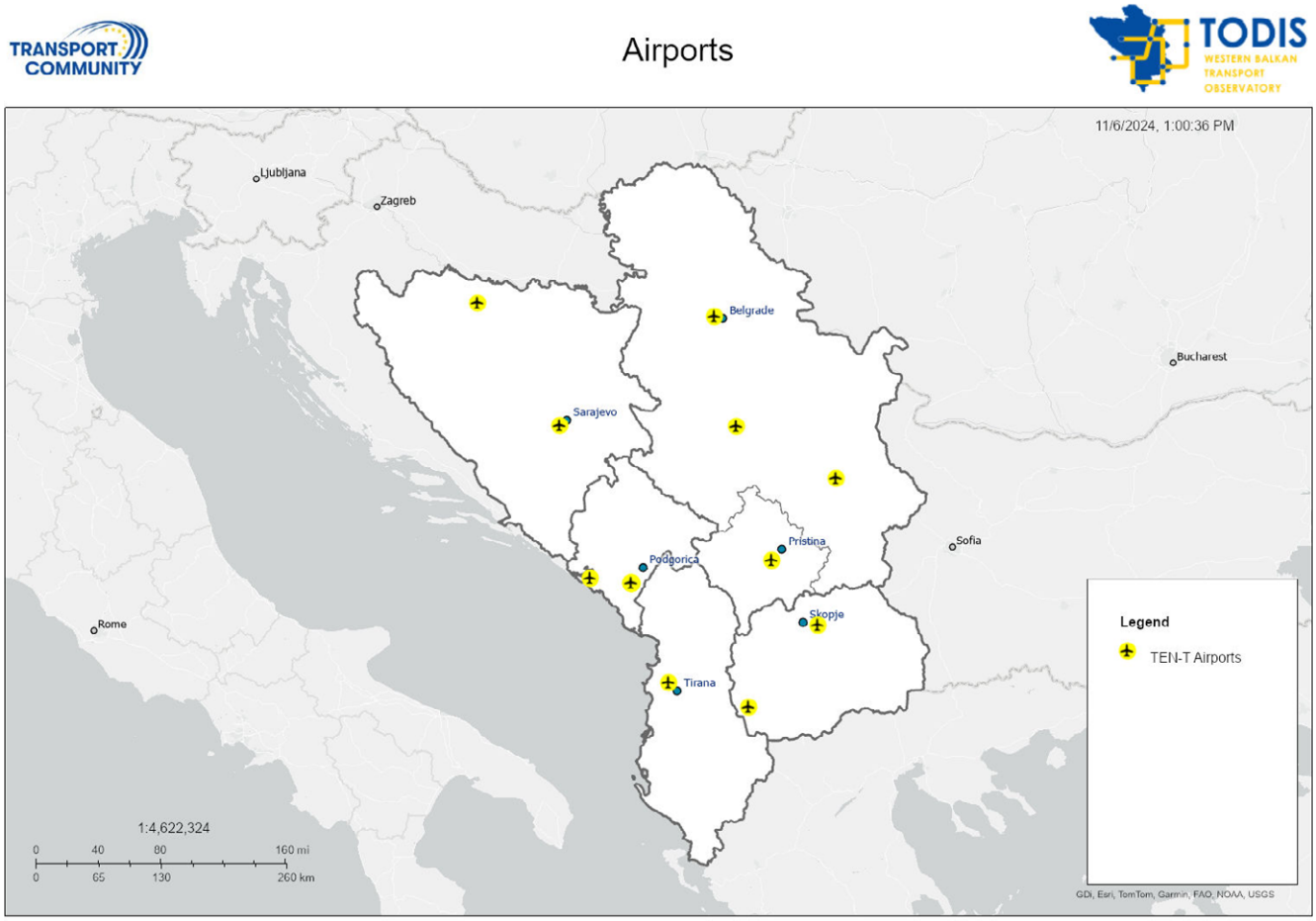
Port name	Rail connection	Road connection	Environment infrastructure	Alternative fuel infrastructure	Terminal availability	VTMIS	MNSW
Vlore	No	Yes	Yes	No	Yes	No	Partially

The Albanian government has planned to convert the actual Port of Vlora into a tourism-focused hub, and a new port will be constructed approximately 10 kilometres north of the current port in Triporti.

2.5. **Airports**

Currently, eleven airports (Tirana, Sarajevo, Banja Luka, Pristina, Podgorica, Tivat Skopje, Ohrid, Belgrade, Kraljevo, Nis) are part of TEN-T Comprehensive Network in Western Balkans, of which six are located on the Core Network (Tirana, Sarajevo, Pristina, Podgorica, Skopje, Belgrade).

Figure 12. Indicative extension of TEN-T Comprehensive and Core Airports to the Western Balkans Region



The legal basis for extending the TEN-T Core and Comprehensive Network to the Western Balkans was originally set in Regulation No. 1315/2013, last updated in 2019. In 2024, however, Regulation 1315/2013 was repealed and replaced by Regulation 1679/2024. This new regulation will serve as the foundation for the upcoming 2025 annual TEN-T compliance assessment.

Due to the timing of data collection, this report is still based on the requirements from the previous regulations, assessing compliance based on three indicators rather than the five introduced in Regulation 1679/2024. The two new indicators are the provision of pre-conditioned air supply to stationary aircraft and the implementation of the Air Traffic Management/Air Navigation System.

The compliance indicators for airports are derived from TEN-T Regulation 1315/2013 where they are mentioned as infrastructure requirements. They are as follows:

- **Railway connection**;
- **Clean fuels** - Applicable only to Core Network Airports;
- **Terminal availability** - At least one terminal is open to all operators in a non-discriminatory way and applies transparent, relevant and fair charges.

Connection to other modes - A key condition to ensure interoperability of airports on the TEN-T Network is their connection to the rail network. Currently, no airports have direct railway connections.

Availability of alternative fuels – Core network airports are expected to support clean and alternative fuels, both for aviation and ground operations. Currently, no permanent storage tanks for aviation biofuels are reported at airports in Podgorica, Belgrade, Skopje, or Pristina. According to TEN-T regulations, airports must be prepared to make alternative clean fuels available based on market demand. This includes readiness for e-mobility and alternative fuels like hydrogen, CNG, and LPG for airport ground services. Bosnia and Herzegovina and Serbia have implemented some use of alternative fuels in airports such as Sarajevo, Belgrade, Nis, and Kraljevo. However, data on alternative fuel use for other regional airports remains unavailable.

Terminal availability- All core and comprehensive network airports are mandated to provide at least one terminal accessible to all operators on a non-discriminatory basis, with transparent and fair fee structures. Airports in the Western Balkans, which are all open to international traffic, currently meet this requirement, hosting foreign air carriers.

Table 5. Compliance indicators- airports

Regional Partner	Airport	Connection to Railway	Connection to Motorway/ Expressway	Availability of alternative fuels		Terminal availability
				tank facilities for aviation biofuel	availability of alternative fuels for airport ground services	
Albania	**Tirana**	No	Yes	Data not provided	Data not provided	Yes
Bosnia and Herzegovina	**Sarajevo**	No	Yes	No	No	Yes
	Banja Luka	No	Yes	Not applicable	Not applicable	Yes
North Macedonia	**Skopje**	No	Yes	No	Data not provided	Yes
	Ohrid	No	Yes	Not applicable	Not applicable	Yes
Kosovo	**Pristina**	No	Yes	No	Data not provided	Yes
Montenegro	**Podgorica**	No	Yes	No	Data not provided	Yes
	Tivat	No	Yes	Not applicable	Not applicable	Yes
Serbia	**Beograd**	No	Yes	No	Yes	Yes
	Nis	No	Yes	Not applicable	Yes	Yes
	Kraljevo	No	Yes	Not applicable	Yes	Yes

Source: Transport Community Permanent Secretariat's own assessment

3. Priority Projects

3.1. Methodological aspects

The current network status regarding compliance with TEN-T standards was analysed in the TEN-T Annual Report and has been presented briefly under Section 2. The present section will include the following:

- an overview of regional plans for network development in order to estimate future compliance rates as per the deadlines set up under EU Regulation 2024/1679 of 13 June 2024 for the completion of Core, Extended Core and Comprehensive Network;
- a project-ranking exercise aimed at identifying the top priorities for the region in terms of TEN-T network development;
- a list of concrete actions and milestones for Regional Partners to focus on over the next few years to ensure proper implementation of priority projects.

For the purpose of this report, a common approach was taken to all transport modes, dividing projects into three categories:

- **Ongoing projects** – projects with funding ensured and for which construction is either ongoing or under tendering or preparation.
- **Priority projects eligible for funding – mature projects** for which a comprehensive evaluation is available based on a completed feasibility study and, if available, a full set of project documentation following EU procedures for Programming and Procurement Rules.
- **Priority projects for preparation – non-mature projects** which require full project preparation and evaluation to determine their feasibility. These projects are not ready for implementation, but funding is required to carry out preparatory work.

It should be noted that the main criterion for splitting the projects refers to the securing (or potential for securing) funding. “Ongoing” does not automatically mean that works are under execution for all projects. For some, it means that funding arrangements have been secured. Likewise, “maturity” does not necessarily imply readiness for implementation (the technical status of projects defined as “mature” may vary significantly) but preparedness for safeguarding financial resources.

3.2. Overview of TEN-T development plans in the region

Transport corridors as coordinated transport networks that enable the movement of people and goods **facilitate faster, smoother and more efficient transit and enhance regional connectivity**. This section provides a detailed overview of TEN-T development plans for all transport modes in the Western Balkans. To highlight the transboundary focus of this report, information has been grouped around the major transport axes in the region.

The starting point of the exercise was the Regional Partners’ SPPs since the projects they included have already been prioritised and ranked based on sound, unified criteria and practice. Assessment rested on two main pillars: strategic relevance and project readiness/maturity. Strategic relevance was evaluated and scored based on project compliance with European, national and sectoral strategies, demand/supply and origin/destination analysis, relation to other transport corridors and routes, traffic safety and economic impact. Short-listed projects

were further assessed in terms of maturity/readiness for implementation to identify gaps in the quality and completeness of project documentation.

The list of all priority projects identified by the Regional Partners in their SPPs, as shown under section 3.3, provides a broad picture of the overall effort the region needs to make to bridge the TEN-T compliance gap. However, several issues need to be further addressed to bring SPPs closer to their basic role of providing strong project prioritisation tools and a consistent link between infrastructure and budgetary planning.

- While the region's infrastructure gap is well documented and acknowledged, the overall number and cost of projects included in the SPPs are clearly unachievable under any scenario.
- Projects could easily climb in rank by simply progressing in terms of maturity, which might ultimately circumvent the prioritisation mechanism.
- The extent to which priority projects in the SPPs are considered by Regional Partners for establishing their mid-term budgetary framework and public debt management is unclear.
- The immediate consequence of the above is that Technical Assistance resources could be spent prematurely on projects with little chance of being implemented in the mid-term. Moreover, there are documented cases of defective budgetary and fiscal planning, resulting in approved priority projects being put on hold.

In due consideration of the methodological constraints mentioned in the background section, the identification of the most critical projects in terms of priority for the region was based on the following:

- The dual-layer nature of the TEN-T Network, with Core sections being given priority over Comprehensive links.
- The pre-identified Flagship transport projects included in the Economic and Investment Plan for the Western Balkans[4].
- Quick wins likely to produce positive results at a fraction of the cost and time usually taken by large infrastructure projects.

Economic Investment Plans Flagship Projects

Referring to Flagship projects as the key prioritisation criterion between competing TEN-T Network sections is justified considering that:

- These projects are the expression of well-documented connectivity needs and have been identified as priorities in previous studies at a regional level;
- Flagship selection is the outcome of an extended consultation process between the European Commission and the Regional Partners, reflecting both regional and EU priorities and benefiting from a broad political consensus;
- Such projects will be prioritised in terms of grant funding allocation. Considering the gap between needs and resources, the availability of grant funding becomes critical for the implementation and, thus, a prioritisation criterion in itself.

4 Source: https://ec.europa.eu/neighbourhood-enlargement/system/files/2020-11/economic-and-investment-plan-brochure .pdf

The list of pre-identified Flagship transport projects in the EIP is given below:

Table 6. Pre-identified Flagship transport projects in the EIP

Flagship	Sector	Project	EIP 2027 milestones
Flagship 1 - Connecting East to West	Road	Nis – Prishtina "Peace Highway"	Prishtina – Merdare (Kosovo section): completed Nis – Merdare (Serbia section): substantially advanced
	Railway	Railway Corridor X modernisation	Nis Railway bypass: completed Belgrade Main Railway Station: completed Belgrade – Sid (HR border): substantially advanced Nis – Presevo: substantially advanced Joint Railway Border Crossing Station Tabanovce: completed
		Railway Corridor VIII modernisation	Skopje – Bulgarian Border: substantially advanced
	Inland Waterways	Improving navigation conditions on the Danube and Sava rivers	Demining of the Sava River: advanced Addressing bottlenecks on the Danube River: in preparation/advanced
Flagship 2 - Connecting North to South	Road	Corridor Vc Motorway	75% of the Corridor completed at motorway standards
		Belgrade – Boljare – Bar Motorway	Podgorica bypass: substantially advanced
		Sarajevo – Podgorica connection	Enhanced
	Railway	Railway Route 4 Belgrade – Podgorica – Bar	Serbian border – Port of Bar: fully rehabilitated
		Railway Corridor Vc Ploce – Samac	Upgraded/ substantially advanced
		Railway Route 10 Prishtina – Kraljevo – Stalac	Pristina – Mitrovica: construction works Serbian side: preparation of the technical documentation done
Flagship 3 – Connecting the Coastal Regions	Road	The "Blue Highway"	Tirana bypass: completed Two road sections in Albania and Budva bypass in Montenegro: substantially advanced
	Railway	Railway Route 2 (Podgorica – Tirana – Durres)	Vora - Hani Hotit: construction works Tirana – Durres - completed Podgorica - Tuzi - Cross Border Albania: preparation of the technical documentation - done

As the technical maturity of projects varies significantly, reaching the 2027 milestones demands quick, well-targeted and coordinated action from Regional Partners. This is all the more important as the amount of available grant financing might increase if Flagship projects progress well.

3.2.1. **Railway projects**

Railway projects include 480 km of new infrastructure lines and 1654 km of lines designated for reconstruction or rehabilitation. Most new projects will maintain the existing alignment but feature upgraded infrastructure. These projects are categorised into two maturity groups with the following values:

- 7 mature projects, totalling EUR 2.01 billion
- 20 projects in preparation, estimated at approximately EUR 9.185 billion

Considering the funding required for both groups, it is evident that there are fewer mature projects than those still in preparation. Nonetheless, these 7 mature railway projects, along with sixteen additional projects listed in the Annual TEN-T Report, represent **1445 km** of modernisation, reconstruction, overhaul, or new construction, valued at EUR **5.88 billion** and will soon proceed to execution.

The value of 16 ongoing and finance-secured projects is approx. **3.87 bn EUR** for **965 km**, 7 mature projects is **2.01 bn EUR for 329 km,** and 20 projects under preparation is **9.39 bn EUR for 1712** km.

3.2.1.1. **European Core Corridors and Core Network**

The Western Balkans – Eastern Mediterranean Core Corridor, as outlined in Article 11 of EU Regulation 2024/1679 (13 June 2024), mandates the completion of Core Network sections by 2030 and extended Core Network sections by 2040. The recent amendments affect only the Extended Core network, meaning the 2030 deadline for the Core Network sections remains unchanged.

The value of 16 ongoing and finance-secured projects is approx. **3.87 bn EUR** for **965 km**, 7 mature projects is **2.01 bn EUR for 329 km,** and 15 projects under preparation is **8.44 bn EUR for 1402** km.

All projects associated with the Core Network are part of either the WBEM (Western Balkans – Eastern Mediterranean) or Rhine-Danube Core Corridor, with the exceptions of the Pozega – Stalac section in Serbia and the Durres – Port of Romano section in Albania. All rail projects are set to be completed by 2030, which will significantly improve the quality of the rail network and enhance passenger and freight services.

Particularly, electrification will be expanded in Albania with the completion of the Tirana-Durres, Vore-Hani Hotit, and Durres-Rogozhine sections, as well as in Serbia for the Nis-Dimitrovgrad and Lapovo-Kraljevo-Rudnica sections. Additionally, there are plans for the complete electrification of the Hani Elezit – Leshak section in Kosovo and the completion of ongoing works on the Kumanovo – Bulgaria border section.

Regarding other key performance indicators (KPIs), significant improvements in ERTMS compliance are expected. Almost all listed projects include the implementation of ERTMS with ETCS Level 1 or 2. The axle load will also be nearly 100% compliant with the 22.5t/axle standard, and 80% of the rail network is expected to achieve a design speed of 100 km/h.

The completion of these projects is anticipated to lead to savings in vehicle operating costs, reduced transport and maintenance times, and improvements in the capacity, reliability, and safety of the railway sections. These developments are expected to promote a shift from road to rail transport, bringing environmental and road safety benefits and contributing to climate change mitigation.

A detailed list of projects, including their current status, is provided in the following table.

Table 7. List of Railway Projects on Core Corridors and Core Network

Regional Partner	Name of the project	EIP Flagship	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Albania	Durres- Tirana and connection with the airport	Yes	Yes	WBEM	46	135	2026	Ongoing
Albania	Rehabilitation of the railway Durres - Rogozhine	Yes	Yes	WBEM	35	120	2028	Finance secured
Albania	Rehabilitation of the railway Vora - Hani Hotit,	Yes	Yes	WBEM	120	340	2029	Finance secured
Albania	Rehabilitation of the railway Rogozhine-Po-gradec-Lin	Yes	Yes	WBEM	130	220	2030	Under preparation
Albania	Rail connection with Porto Romano	No	Yes	No	9	15	2025	Under preparation
Bosnia and Herzegovina	Rehabilitation (Doboj-Maglaj-Rasput-nica Miljacka)	Yes	Yes	WBEM	190	1500	2023	Under preparation
Bosnia and Herzegovina	Rehabilitation of railway section Visoko – Konjic	Yes	Yes	WBEM	87	340	2030	Under preparation
Bosnia and Herzegovina	Track Overhaul of Railway Section Podlugovi- Zenica	Yes	Yes	WBEM	22	24	2027	Under preparation
Bosnia and Herzegovina	Track overhaul of the railway sections Doboj-Maglaj and Jelina-Zenica	Yes	Yes	WBEM	32	22.5	2027	Mature
Bosnia and Herzegovina	Track overhaul of the railway sections Podlugovi- Sarajevo	Yes	Yes	WBEM	25	25	2027	Mature
Bosnia and Herzegovina	Overhaul and modernization of the railway section Šamac – Doboj – Rječica	Yes	Yes	WBEM	85	162.5	2025	Finance secured
Kosovo	Railway Rehabilitation Leshak – Hani Elezit	Yes	Yes	WBEM	149	245	2027	Ongoing
North Macedonia	Rehabilitaton of Kumanovo-Beljakovce	Yes	Yes	WBEM	30.8	44	2024	Ongoing
North Macedonia	Rehabilitation Beljakovce-Kriva Palanka	Yes	Yes	WBEM	34	155	2026	Ongoing
North Macedonia	Construction of Joint Railway Border Crossing Station (JRBS) and access road at Tabanovce between North Macedonia and the Republic of Serbia	Yes	Yes	WBEM	N/A	7.5	2027	Mature

Regional Partner	Name of the project	EIP Flagship	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
North Macedonia	Construction works of section Kicevo – Struga	No	Yes	WBEM	52	426	2032	Mature
North Macedonia	Construction works of section Struga – connection with Albanian network	No	Yes	WBEM	10	100	2032	Mature
North Macedonia	Construction Kriva Palanka -Deve Bair	Yes	Yes	WBEM	23.4	560	2032	Finance secured
North Macedonia	Renewal and/or reconstruction works on Railway Corridor X	No	Yes	WBEM	200	400	2032	Under preparation
Montenegro	Reconstruction Podgorica - Tuzi - Border Albania	No	Yes	WBEM	25	84.4	2030	Under preparation
Montenegro	Rehabilitation Lutovo – Bratonozici – Bioce	Yes	Yes	WBEM	20	30	2027	Finance secured
Montenegro	Bar-Vrbnica section, Reconstruction of 10 steel bridges and 8 tunnels	Yes	Yes	WBEM	140	45.5	2027	Finance secured
Montenegro	Rehabilitation of 12 tunnels Vrbnica - Bar	Yes	Yes	WBEM	4	20	2027	Finance secured
Montenegro	Rehabilitation Golubovci – Bar section, including Ratac landslide and Sozina tunnel	Yes	Yes	WBEM	39	218.43	2027	Finance secured
Serbia	Reconstruction of Beograd - Sid	Yes	Yes	WBEM	92	740	2029	Under preparation
Serbia	Reconstruction of the Lapovo - Kraljevo - Rudnica	No	Yes	WBEM	77	440	2029	Under preparation
Serbia	Reconstruction of the Stalac - Kraljevo - Pozega	No	Yes	No	72	290	2029	Under preparation
Serbia	Reconstruction of the Pancevo - Vrsac - state border with Romania	No	Yes	Rhine - Danube	83	425	2028	Under preparation
Serbia	Reconstruction of Belgrade - Nis railway line	No	Yes	WBEM	230	2775	2029	Under preparation
Serbia	Reconstruction Brestovac - Presevo - state border with North Macedonia	No	Yes	WBEM	135.5	700	2029	Under preparation
Serbia	Construction of the by-pass railway line Beli Potok – Vinca – Pancevo with a road-railway bridge over the Danube River near Vinca	No	Yes	WBEM	29.9	300	NA	Under preparation

Regional Partner	Name of the project	EIP Flagship	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Serbia	Reconstruction of the railway bypass around Belgrade, Batajnica – Ostruznica – Beograd Ranzirna	No	Yes	WBEM	20	182.3	2029	Under preparation
Serbia	Reconstruction of Belgrade - Novi Sad - Subotica - state border with Hungary	No	Yes	WBEM/Rhine Danube	108	1068	2024	Ongoing
Serbia	Reconstruction of Nis - Dimitrovgrad railway line	Yes	Yes	WBEM	108	426	2027	Ongoing
Serbia	Construction of a single operational centre for railway traffic management on the railway network of the Republic of Serbia	No	Yes	WBEM	N/A	115	2026	Ongoing
Serbia	Construction works on the Main Rail station - phase 2	No	Yes	WBEM	N/A	27	2026	Mature
Serbia	Reconstruction of the Resnik - Vrbnica - state border with Montenegro	No	Yes	WBEM	210	1400	2030	Mature
Serbia	Construction of a new line Zemun polje - Nikola Tesla Airport - National Stadium	No	Yes	WBEM	18	188.1	2026	Ongoing
						14,316		

3.2.1.2. **Comprehensive Network**

According to EU Regulation 2024/1679, the deadline for completing the Comprehensive Network remains set in 2050. Currently, five projects under preparation are valued at 950 million EUR, covering 310 km of rail network.

However, projects associated with the Comprehensive Network have a 2030 completion deadline based on data provided by regional partners. Approximately 800 km of the Comprehensive Network are not scheduled for intervention, which poses a significant challenge for regional partners in the coming years, as the goal is to complete the entire network by 2050.

All projects are currently in various stages of design and planning. Each rail section under these projects, as listed in the table below, must comply with TEN-T requirements. This means that all regional partners are required to update their technical documentation to align with the new TEN-T standards.

The list of projects, along with their status, is shown in the following table.

Table 8. List of Railway Projects on Comprehensive Network

Regional Partner	Name of the project	EIP Flagship (Yes/No)	SPP	Core/ Comprehensive Network	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Albania	Construction of the new railway Pogradec-Korca – border to Greece (CB RAILWAY)	No		Yes	60	240.5	2030	Under preparation
Bosnia and Herzegovina	Rehabilitation of Doboj-Tuz-la-Brčko			Yes	120	323	2030	Under preparation
Bosnia and Herzegovina	Rehabilitation of Tuzla-Zvornik, and construction Tuzla- airport			Yes	75	279	2030	Under preparation
Kosovo	Rehabilitation Pristina - Merdare			Yes	45	67.3	2025	under preparation
Kosovo	Construction of line Pristina - Airport			Yes	10	40.2	2025	under preparation
					310	**950**		

3.2.2. **Road projects**

3.2.2.1. **European Core Corridors and Core Network**

The Road Core network remains unchanged, while the Comprehensive Network has been modified. As a result, the deadlines for completion only apply to the Extended Core network, meaning the 2030 deadline for the Core Network sections remains the same.

The Western Balkans is currently implementing a range of road infrastructure projects across the Core Network and WBEM Core Corridor, aimed at enhancing regional connectivity and supporting economic integration. Several significant projects are ongoing, covering 622 km, with an estimated investment of €8,5 billion. These projects include the construction and upgrading of critical road segments such as the Tirana Bypass, Adriatic – Ionian highway and Corridor VIII segments in Albania, as well as key sections of the Western Balkans Mediterranean Corridor in Bosnia and Herzegovina, known as Corridor Vc. The estimated completion deadlines for these projects vary, extending up to 2028, highlighting the region's long-term commitment to building sustainable and efficient road infrastructure.

There are 15 mature projects, approximately 285 km with a total cost of €3,9 billion. A total of 9 out of 15 mature projects are part of the Western Balkans Eastern Mediterranean Core Corridor, approx. length of 183 km, with an estimated cost of €2,2 billion.

Furthermore, 13 projects are under preparation aiming to address gaps in the network and facilitate better cross-border and intra-regional connectivity. These include vital sections like the widening of motorways and the construction of new bypasses, contributing 375 km to the network, with an estimated investment of €6,2

billion. The completion timelines for these preparatory projects range from 2026 to 2040, signalling a phased and strategic road network expansion. A total of 8 out of 13 projects under preparation are part of the Western Balkans Eastern Mediterranean Core Corridor, approx. length of 249 km, with an estimated cost of €4,2 billion.

Overall, there are 32 ongoing road projects along the Core Network, of which 30 projects on the Western Balkans Eastern Mediterranean Core Corridor. There is approximately 622km of road under construction and financing secured, 15 mature projects (9 on Western Balkans Eastern Mediterranean Core Corridor), approx. 252km and 13 projects (8 projects on Western Balkans Eastern Mediterranean Core Corridor) under preparation, approx. 375km.

The ongoing projects, costing nearly €8.5 billion, are set to enhance key routes such as the Western Balkans Mediterranean Corridor Vc and Adriatic Ionian Highway in Albania. The mature and under-preparation projects' needs amount to an additional €10 billion in investment, indicating the region's commitment to long-term infrastructural development, ensuring better regional connectivity.

The list of projects by status is shown in the following table:

Table 9. Core Network Road Projects

Regional Partner	Name of the project	EIP (Yes /No)	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Albania	Construction of Tirana bypass (Kashar - Vaqarr - Mullet)	Yes	Yes	Western Balkans Mediterranean Corridor	21.5	223	2027	ongoing
Albania	AIC Section 1: Murriqan - Balldren	Yes	Yes	Western Balkans Mediterranean Corridor	41	469.41	2030	mature
Albania	AIC Section 2: Balldren (starting from Lezha Bypass) - Milot	Yes	Yes	Western Balkans Mediterranean Corridor	16	213.6	2028	mature
Albania	AIC Section 3: Milot-Thumane	Yes	Yes	Western Balkans Mediterranean Corridor	14	44.62	2028	ongoing
Albania	AIC Section 5B: Kashar - Lekaj	Yes	Yes	No	34	569.85	2028	ongoing
Albania	AIC Section 5C: Lekaj - Konjat-Fier	Yes	Yes	No	14	381.12	2030	ongoing
Albania	AIC Section 6+7: Konjat - Fier bypass	Yes	Yes	No	28		20 months after contract signing	ongoing
Albania	AIC Section 9A-2: Fier bypass (Levan) - Pocem	Yes	Yes	No	26	160	2040	mature
Albania	AIC Section 9B-2: Pocem - Memaliaj	Yes	Yes	No	38	597	2040	mature

Regional Partner	Name of the project	EIP (Yes /No)	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Albania	AIC Section 10: Memaliaj - Subashi Bridge	Yes	Yes	No	20	260	2030	mature
Albania	AIC Section 11: Subashi Bridge - Gjirokaster bypass	Yes	Yes	No	10	66	2040	mature
Albania	AIC Section 12A: Gjirokaster bypass	Yes	Yes	No	10	64	2040	mature
Albania	AIC Section 13A: Gjirokaster bypass - Kakavije	Yes	Yes	No	24	138	2028	mature
Albania	Widening of Tirane - Durres Motorway	No	Yes	Western Balkans Mediterranean Corridor	35	35	2026	ongoing
Albania	Rehabilitation of Corridor VIII, connection with Northern Macedonia. Section Elbasan - Pika Doganore Skenderbej, Rrajce	No	Yes	Western Balkans Mediterranean Corridor	47	995	2028	under preparation
Albania	Rehabilitation of the Elbasan - Lekaj road section part of Corridor VIII	No	Yes	No	41	360	2027	under preparation
Albania	Construction of the Bushtrice - Cross border Point road section part of Corridor VIII	No	Yes	Western Balkans Mediterranean Corridor	12	216	2028	under preparation
Albania	Construction of Elbasan bypass	No	Yes	No	16	200	2027	under preparation
Albania	Widening and completeness of the Milot-Rreshen road section	No	Yes	No	28	60	2026	under preparation
Albania	Rehabilitation of the Fier-Frataj road section	No	Yes	No	39	42	2027	under preparation
Bosnia and Herzegovina	Vukoslavije - Johovac	Yes	Yes	Western Balkans Mediterranean Corridor	5.2	470.3	2028	ongoing
Bosnia and Herzegovina	Rudanka - Putnikovo Brdo	Yes	Yes	Western Balkans Mediterranean Corridor	5,2	164,9	2024	ongoing
Bosnia and Herzegovina	Putnikovo Brdo - Medakovo	Yes	Yes	Western Balkans Mediterranean Corridor	8.5	142,7	2025	ongoing

Regional Partner	Name of the project	EIP (Yes /No)	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Bosnia and Herzegovina	Medakovo - Ozimica	Yes	Yes	Western Balkans Mediterranean Corridor	21.3	361,7	2026	ongoing
Bosnia and Herzegovina	Ozimica - Poprikuse	Yes	Yes	Western Balkans Mediterranean Corridor	12	306	2027	ongoing
Bosnia and Herzegovina	Poprikuse - Nemila	Yes	Yes	Western Balkans Mediterranean Corridor	5.5	251	2025	ongoing
Bosnia and Herzegovina	Nemila - Vranduk	Yes	Yes	Western Balkans Mediterranean Corridor	5.7	110.94	2026	ongoing
Bosnia and Herzegovina	Vranduk - Ponirak	Yes	Yes	Western Balkans Mediterranean Corridor	5.3	153.45	2026	ongoing
Bosnia and Herzegovina	Ponirak - Vraca	Yes	Yes	Western Balkans Mediterranean Corridor	3.4	70.8	2025	ongoing
Bosnia and Herzegovina	Vraca (Tunnel Zenica) - Donja Gračanica	Yes	Yes	Western Balkans Mediterranean Corridor	3.9	57.6	2025	ongoing
Bosnia and Herzegovina	Mostar South - Tunnel Kvanj	Yes	Yes	Western Balkans Mediterranean Corridor	9.2	93.5	2026	ongoing
Bosnia and Herzegovina	Tunnel Kvanj - Buna	Yes	Yes	Western Balkans Mediterranean Corridor	5.2	106.9	2025	ongoing
Bosnia and Herzegovina	Buna - Počitelj	Yes	Yes	Western Balkans Mediterranean Corridor	7.2	37.2	2025	ongoing
Bosnia and Herzegovina	Počitelj - Zvirovići	Yes	Yes	Western Balkans Mediterranean Corridor	11.1	91	Completed	ongoing
Bosnia and Herzegovina	Nević polje - Vitez section (part of Jajce - Lašva Express Road)	No		No	4.9	42.5		ongoing
Bosnia and Herzegovina	Construction of the Corridor Vc motorway section: Ivan – Konjic (Ovcari) – exit from Prenj tunnel (Salakovac)	Yes	Yes	Western Balkans Mediterranean Corridor		995	2027	Under preparation
Bosnia and Herzegovina	Construction of the Corridor Vc motorway section exit from Prenj Tunnel (Salakovac) - Mostar North	Yes	Yes	Western Balkans Mediterranean Corridor	12.34	188.8	2028	mature

Regional Partner	Name of the project	EIP (Yes /No)	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Bosnia and Herzegovina	Construction of the expressway section Turbe – Nevića Polje -Lašva	Yes	Yes	No		641	2030	mature
Bosnia and Herzegovina	Betterment of the main road section (bypass) Banja Luka - Jajce - Lašva	No	Yes	No		169	2030	under preparation
Bosnia and Herzegovina	Construction of the interstate bridge over the Sava River in Gradiska	No	Yes	No		146	2040	under preparation
Kosovo	Construction of Pristina – Mitrovica motorway	Yes	No	No	19.4	42	2025	ongoing
Montenegro	Highway Bar-Boljare - section Matese-vo-Andrijevica	No	Yes	Western Balkans Mediterranean Corridor	22	562	2030	under preparation
Montenegro	Highway Bar-Boljare - section Andrijevica – Boljare	No	Yes	Western Balkans Mediterranean Corridor	50	885	2034	under preparation
Montenegro	Highway Bar-Boljare - section Smokovac – Tolosi – Farmaci (Podgorica bypass)	Yes	Yes	Western Balkans Mediterranean Corridor	10	180	2029	under preparation
Montenegro	Highway Bar-Boljare - section Djurmani - Farmaci	No	Yes	Western Balkans Mediterranean Corridor	51	900	2034	under preparation
Montenegro	“Blue highway” - expressway along Montenegrin coast	No	Yes	No	59	1475	2035	under preparation
North Macedonia	Construction of Kriva Palanka – Stracin Expressway	No	No	Western Balkans Mediterranean Corridor	25.5	93.7	2024	ongoing
North Macedonia	Construction of the Bukojcani – Kicevo Motorway section	No	No	Western Balkans Mediterranean Corridor	12.7	129	2027	ongoing
North Macedonia	Construction of the Kicevo - Ohrid Motorway	No	Yes	Western Balkans Mediterranean Corridor	57.7	598	2026	ongoing
North Macedonia	Construction of Blace – Skopje (Stenkovec Interchange) Motorway Section	No	Yes	No	12.5	230.41	2027	ongoing

Regional Partner	Name of the project	EIP (Yes /No)	SPP	Core Corridor	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
North Macedonia	Rehabilitation with a widening of Motorway A1, section Petrovec - Katlanovo (right carriageway)	No	Yes	Western Balkans Mediterranean Corridor	11.66	11.05	2024	ongoing
North Macedonia	Construction of the Tetovo – Gostivar – Bukojcani Motorway	No	Yes	Western Balkans Mediterranean Corridor	47.8	1300	2028	ongoing
North Macedonia	Construction of road section Trebeniste-Struga - Kjafasan	No	Yes	Western Balkans Mediterranean Corridor	21.7	80	2028	ongoing
North Macedonia	Construction of new express road Romanovce – Stracin	No	Yes	Western Balkans Mediterranean Corridor	40	88	2025	mature
North Macedonia	Rehabilitation of road section Gevgelija - Greek border (Bogorodica)	No	Yes	Western Balkans Mediterranean Corridor	5	1.5	2022	mature
North Macedonia	Rehabilitation of road section Negotino – TEC Negotino (Rehabilitation of road section Demir Kapija Negotino, length 14.80km, cost 9.11 eur, completion June 2024)	No	Yes	Western Balkans Mediterranean Corridor	6	8	2022	mature
North Macedonia	Rehabilitation of road section Gradsko – Stobi	No	Yes	Western Balkans Mediterranean Corridor	4	4.5	2022	mature
Serbia	Nis - Plocnik*	Yes	No	Western Balkans Mediterranean Corridor	32.7	416.2	2029	ongoing
Serbia	Preljina - Pozega	No	No	No	31	450	2025	ongoing
Serbia	Pozega – Duga Poljana	No	No	No	74.9	1700	2027	ongoing

3.2.2.2. **Comprehensive Network**

Regulation 1679/2024 introduced modifications to the TEN-T Road Comprehensive Network, adding the following road sections:

Tuzla-Zvornik section in Bosnia and Herzegovina is 56 km of conventional road with medium-quality conditions and serves as an essential link between Bosnia and Herzegovina and Serbia.

Mostar-Vinjani is a 53.78 km express route connecting Bosnia and Herzegovina with Croatia in the western part, supporting cross-border trade and travel with Croatia.

Ruma to Zvornik is the link connecting Serbia and Bosnia and Herzegovina. This section is comprised of three subsections with different characteristics. **Ruma-Šabac** section, a 33.8 km highway, offers a very good driving experience with upgraded facilities and faster transit times. **Šabac-Loznica** 56.67 km sections are built to expressway standard and are maintained in very good conditions, facilitating efficient regional movement between Serbia and Bosnia and Herzegovina. **Loznica to Zvornik** is the last remaining 20.27 km section with conventional roads of medium-quality conditions.

Lipjan – Duhel, a conventional road with a length of 36.17 km, is in good condition, reinforcing the internal connectivity in Kosovo.

The Comprehensive Network in the Western Balkans complements the Core Network by focusing on secondary road infrastructure that enhances local connectivity and inter-city transport. There are 8 ongoing projects in the Comprehensive Network covering a total length of 375 km, with an investment of €3,03 billion. Key projects in this category are ongoing in all the regional partners, including the Novi Sad-Ruma motorway in Serbia (44.41 km), which aims to improve access to the northern parts of the country, and the Prilep-Bitola motorway in North Macedonia (39.3 km), a crucial route for connecting major economic centres. Similarly, the improvements of the Banja Luka-Prijedor route (40.7 km) in Bosnia and Herzegovina, Novi Sad – Ruma (44.4km), Pojate – Preljina (113km) underscore the network's focus on regional accessibility and mobility. The completion timelines for these projects range from 2024 to 2030, with ongoing construction efforts already well underway.

There are 7 projects in their mature phase, ready for implementation pending financial closure. These mature projects total 120 km, with an estimated cost of €850 million. They include the construction of critical road segments like the expressways in Montenegro (Zaborje-Jasenovo Polje) and North Macedonia (Prilep-Raec Bridge), along with significant investments in cross-border routes and new bridge constructions. There are 2 projects under preparation amounting to over 60 km and valued at €2.3 billion, which includes the construction of the E-761 highway between Serbia and Bosnia and Herzegovina, which is expected to be completed by 2030.

The list of projects by status is shown in the following table:

Table 10. Comprehensive Network Road projects

Regional Partner	Name of the project	EIP Flagship (Yes/No)	SPP	Core/ Comprehensive Network	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Bosnia and Herzegovina	Banja Luka - Prijedor	No		Comprehensive	40.7	297	2027	ongoing
Bosnia and Herzegovina	Construction of the motorway Orašje - Tuzla	No		Comprehensive	67.68	?	2030	ongoing
Bosnia and Herzegovina	Improvement and construction of the road route Sarajevo - Foca (Brod na Drini) - Hum (Scepan Polje) with the interstate bridge at the BIH/MNE border	Yes	Yes	Comprehensive		300		mature
Kosovo	Widening of the Kjeve-Dollac road section	No	No	Comprehensive	13.4	32	2025	ongoing
Montenegro	Berane - Bijelo Polje - Mojkovac	No	No	Comprehensive	43	36	2026	ongoing
Montenegro	Berane - Rozaje	No	No	Comprehensive	33	55	2028	mature
Montenegro	Zaborje - Jasenovo polje	Yes	Yes	Comprehensive	14	15	2026	ongoing

Regional Partner	Name of the project	EIP Flagship (Yes/No)	SPP	Core/ Comprehensive Network	Total length (km)	Total Cost (M€)	Estimated completion deadline	Project implementing status
Montenegro	Reconstruction of the trunk road Šćepan Polje-Plužine (border crossing with Bosnia and Hercegovina)	Yes	Yes	Comprehensive	19.9	139	2027	mature
Montenegro	Construction of the new bridge over the Tara River between Montenegro and Bosnia and Hercegovina	Yes	Yes	Comprehensive	1	3	2027	mature
North Macedonia	Construction of the Prilep - Bitola motorway	No	Yes	Comprehensive	39.3	130	2028	ongoing
North Macedonia	Construction of road section Prilep - Raec Bridge	No	Yes	Comprehensive		8.8	2030	mature
North Macedonia	Construction of expressway Bitola – Medzitlija, including Bitola interchange	No	Yes	Comprehensive	16	50	2030	mature
North Macedonia	Construction of motorway Veles – Prilep	No	Yes	Comprehensive	63	295	2025	mature
Serbia	Novi Sad - Ruma	No	Yes	Comprehensive	44.41	650	2026	ongoing
Serbia	Pojate - Preljina	No	No	Comprehensive	112.39	1858	2025	ongoing
Serbia	Construction of highway E-761 / M-5 / Bosnia and Herzegovina Border-Kotroman-Uz-ice-Pozega	No	Yes	Comprehensive	60	1100	2030	under preparation

3.2.3. Inland Waterway projects

3.2.3.1. European Core Corridors and Core Inland Waterway Network

Demining of the right bank of the Sava River This project aims to clear mines along the right bank of the Sava River in Bosnia and Herzegovina, from the Drina to the Una. Part of the Western Balkans Economic and Investment Plan under Flagship 1 – Connecting East to West, it is expected to have a significant regional impact. The authorities are preparing updated documentation based on 2014 designs, with a project budget of €8.16 million. This project will be financed by the World Bank; demining activities are set to begin in 2025 and take around 12 months to complete.

River Training and Dredging Works on Critical Sectors of the River Sava. Jointly involving Serbia and Bosnia and Herzegovina, this project addresses critical navigation bottlenecks over a 211 km stretch, with 33 km jointly managed, to enhance safe and efficient river traffic. Initially studied in 2008, the project now undergoes an update funded by IPA. Serbia's Directorate for Inland Waterways will lead the project, which includes river training structures, dredging, and environmental monitoring. The estimated cost is €7 million, with €1.3 million for oversight and €1 million for technical documentation. Key preparatory steps include updated designs, environmental assessments, and permits.

River training and dredging works on critical sectors of the Serbian-Croatian joint stretch: This project, part of the Western Balkans Economic and Investment Plan (FLAGSHIP 1), aims to clear navigation bottlenecks to allow for larger vessels and safer, uninterrupted transit, especially near Apatin where low water levels often hinder passage. Enhancing this waterway will boost inland transport, increasing cargo and passenger volumes. Covering 24 critical sectors between Hungary and Belgrade, nearly complete designs for six Serbian sectors lay the groundwork for completion. Initially estimated at €122.4 million, costs have been revised to €48.5 million. Final permits and documentation remain pending.

FAIRway works in the Rhine-Danube Corridor. Another significant initiative is the project for the Supply of Marking and Hydrographic Vessels for the Danube, Sava, and Tisa Rivers, which is part of the "FAIRway works in the Rhine Danube Corridor." This project focuses on procuring a marking vessel and a hydrographic vessel equipped with multibeam and ADCP capabilities. The tender process has been completed, bids have been evaluated and the construction of the marking vessel has already commenced.

The Hydrometeorological Stations project aims to implement a network of 38 hydro-meteorological stations along the Danube and Sava rivers in Serbia. These stations will be equipped with sensors to monitor various parameters, including pressure, temperature, wind, waves, and fog. The project began in March and is currently in its inception phase, with an expected duration of 30 months.

The removal of the sunken German fleet from World War II is also underway, with plans to extract four sunken vessels in Serbia. During this operation, the fairway will be temporarily shifted to the Romanian side in the Gogoș channel. The estimated overall costs of this project are €29.1 million from EU contributions and European Investment Bank through the WBIF.

3.2.3.2. European Core Inland Waterway Network Ports

New Port of Belgrade and Free Trade Zone: This project will establish a modern port outside Belgrade, near key transport corridors, to replace the underused downtown port on the Danube. Located by the Pupin Bridge, it will connect to major roads and rail, enhancing multimodal links in Southeast Europe. A free trade zone is also planned to boost trade. The port will include terminals for general cargo, bulk, containers, ro-ro, and Oil & LNG. Preparations involve feasibility and environmental studies, with an estimated cost of €180 million (€90 million for infrastructure).

3.2.3.3. Comprehensive Inland Waterway Port

The expansion of capacities of the Port of Sremska Mitrovica is supported by the World Bank and EIB, as part of the Integrated Development Program of the Sava and Drina River Corridors. Activities are being conducted in accordance with the Decree on Determining the Port Area in Sremska Mitrovica and the adopted Detailed Regulation Plan for the RTC Luka Leget complex. This encompasses both coastal and water surface areas along the left bank of the Sava River, downstream from the town's centre, constructing a 200-meter embankment on the left bank, and a vertical wharf structure measuring 177 meters adjacent to the bulk cargo terminal.

The expansion of the port of Prahovo on the Danube River is projected to cost €36 million ($39.3 million), funded through the state budget. This upgrade will increase the port's throughput capacity from 1.5 million to approximately 3.5 million tonnes per year. The reconstruction will involve closing the winter facility and constructing new facilities, including a head office building that will house the customs office, harbour master's office, and other essential state bodies and the green terminal for the environmental performance of vessels, in particular for ship-generated waste. Construction is expected to take around three years, during which the port will remain operational.

3.2.4. Maritime projects

3.2.4.1. European Core Corridors and Core Maritime Ports

Construction of Phase 1 of the New Integrated Port in Porto Romano – Durres. Albania plans to transform the current Port of Durres into a tourist port, relocating commercial operations to Porto Romano. This aligns with TEN-T extension goals, with impacts on compliance monitored closely.

Phase 1, budgeted at €390 million, includes building berths, quay walls, terminal facilities, and integrated IT systems for efficient management and vessel monitoring. The contract is set to be signed in 2025.

Upgrading Infrastructure at the Port of Bar, Montenegro. In July 2024, the TEN-T Core Port of Bar JSC suffered significant damage from a hurricane, destroying three gantry cranes and a ship loader at the Dry Bulk Cargo Terminal. In response, "Luka Bar" JSC's Board of Directors has initiated procurement for a new mobile port crane, financed by a €5 million loan from the Investment and Development Fund. However, since no feasibility study has been conducted, the project, including its four components, is still under preparation, with no timeline for the study's completion.

3.2.4.2. Comprehensive Maritime Ports

Construction of the New Integrated Port in Triporti, Vlore and Transfer of Services. Following Albania's strategy for Maritime Transport and Port Infrastructure, it is planned to convert the actual commercial port into a marina and reallocate the existing port in another area 12 km north in 'Triporti' Vlore. The contract for the construction and operation of the new integrated port at Triporti, Vlore has been signed between the contracting authority and the concessionaire. The concessionaire is currently in the process of securing the necessary licenses and permits to begin construction work.

3.2.5. Airport projects

This chapter provides an overview of key airport infrastructure projects across the region aimed at modernising facilities, increasing capacity, and enhancing safety. From terminal expansions and apron extensions to runway rehabilitation and multimodal transport connections, these projects reflect a comprehensive approach to preparing airports for future demands and aligning with European standards. Significant investments are directed towards ongoing and planned projects, underscoring a commitment to infrastructure development that supports growth, efficiency, and sustainability in air travel.

Ongoing projects

Numerous projects aimed at modernising **Sarajevo Airport** are underway, focusing on expanding its capacity. The **Business Administration Building** was completed in December 2022 with a budget of €3 million, and the **Terminal B Extension and Modernisation** was finalised in May 2024, totalling €26.5 million in investment. Currently, the **Runway Reconstruction**, valued at €29.45 million, is in the permit-obtaining phase, with completion projected for December 2024. The **Apron Extension - East** was executed in July 2024 at a cost of €3.4 million, while the **New Rapid Exitway** project, budgeted at €3.69 million, is in the process of obtaining a building permit. Additionally, the **New Fuel Depot**, estimated at €2.62 million, is targeted for completion by December 2026, and the **Airport Rescue and Firefighting Center**, with a budget of €5.1 million, is in the process of securing urban permits. These projects collectively underscore Sarajevo Airport's commitment to modernising its infrastructure to meet future demands.

In Albania, the rehabilitation and construction of the **40.7 km Durres - Tirana railway line, part of the Core Network**, will connect Tirana Airport to the rail system. This project is estimated at EUR 129 million, excluding planned electrification. Additionally, with an investment of EUR 3.25 million, the **North and South Terminal Project** aims to enhance passenger terminal infrastructure, with completion targeted for 2026. The expansion of **Tirana International Airport**, budgeted at EUR 8.7 million, is also underway to boost operational capacity and meet rising demand, scheduled for completion in 2026. A separate rehabilitation project, valued at EUR 9.5 million, is **modernising the runway, connecting roads, and parking facilities to accommodate E-code aircraft**, expected to finish by 2024. These projects demonstrate Albania's commitment to improving airport facilities for increased air traffic and a better passenger experience.

Niš airport's existing terminal building cannot meet future airport needs. It is planned to reconstruct the existing area of 2,115 m2 and build new facilities of 3,600 m2 with a total project value of EUR 11.1 million. A permit has been obtained, and public procurement for construction work closed on January 20, 2022. Phase I is completed and put into operational work.

Commercial contract was signed for the phased construction and reconstruction of internal traffic infrastructure and associated hydrotechnical, electrical and telecommunications installations within the "Niš Constantine the Great Airport" complex, dated March 19, 2024. Due to additional and unpredicted but necessary works, Annex 1 of the contract was signed on September 27, 2024, to implement the commercial contract fully.

The contract amount for the works that are the subject of the Contract is **EUR 16,855,647.77**, and after the conclusion of Annex 1 of the Contract, the total value of the Contract is **EUR 18,539,567.08** So far, 98% of the works predicted by the Contract have been completed.

At Morava Airport (Kraljevo), a project is in the design phase to extend the apron and build a technical service and firefighting facility, with an estimated value of EUR 20.8 million.

Modernisation and expansion work began at **Belgrade's Nikola Tesla Airport** in early 2020, with substantial completion expected by 2024. Completed projects include a **newly constructed runway (BCIR),** de/anti-icing pad, landside access, and terminal parking. Ongoing work covers runway and terminal **reconstruction and extension (phases 1.3, 1.4, and 2.2)**. Preparations are underway for the **Airport Rescue and Firefighting Center,** and technical documentation is being developed to ensure railway connection compliance.

The Landside Access and Car Parks project at Belgrade Airport involves reconstructing and rehabilitating access roads and terminal parking. The project, designed to improve capacity and accessibility, is fully funded and ongoing, with the usage permit process in progress. Key design phases, including the concept, preliminary, and detailed designs, have been successfully completed**.**

Planned Projects under preparation

The Podgorica Airport Development project is a part of several strategic documents: the Transport Development Strategy of Montenegro (2010), Tourism Development Strategy of Montenegro up to 2020 (2008), Master Plan for Airport Development to 2030 (2010), Single Project Pipeline, Pre-accession Economic Program for Montenegro 2012-2015 (2012) and the draft National Development Plan 2013-2016 Montenegro (2012). The project is in an early preparation phase and only a conceptual idea has been developed so far.

The proposed project aims to maintain the safety level of air transport and to meet the demands and standards of national and international regulations. As a part of the project, a new terminal building, with a capacity of 12,500 m^2, should be constructed, and manoeuvring areas and apron expanded and reconstructed. Additionally, a new fuel depot and parking and ground support facilities (including a shelter) are also envisaged. Podgorica Airport is located on the Core Network and the total project cost is 94.84 million euros.

On October 9, 2024, a Memorandum of Understanding was signed between the Government of the Republic of Serbia and China Shandong International Economic & Technical Cooperation Group Ltd. for the implementation of the "**Niš Constantine the Great Airport" construction and modernization project.** A commercial contract is planned to be signed for Phase II, which includes the rehabilitation, construction, and equipping of operational surfaces at the airport. The project encompasses the rehabilitation of the airport's runway, the construction of a ramp extension and service road connecting the terminal building with the aircraft parking ramp, **the construction of the Niš Air Traffic Control (ATC) tower**, and the construction of a taxiway with a remote stand. Additionally, it includes the demolition of the old terminal building and the construction of a new terminal with full equipment, the projection and construction of a runway safety area, and the construction of a hangar for aircraft servicing.

It has to be pointed out that according to the European Green Deal and EU Sustainable and Smart Mobility Strategy, no EU funds are envisaged to support investment in airport capacity, and more focus should be placed on greening the airports.

3.3. Summary of mature and non-mature projects in the region

Ongoing projects in the region have been reviewed and presented in detail in the TEN-T Annual Report. Based on the scheduled completion date of these projects, the Annual Report included a forecast of the TEN-T compliance rate for the year 2027.

Summary tables of mature and non-mature TEN-T projects in the region have been centralised and are hereby presented, with details on location, cost and expected completion timeframe. It is worth underlining that, given the projects' maturity stage, the expected completion date is purely indicative, assuming that financing is obtained in time and the project completed on time. The less mature the projects currently are, the higher the odds of delays in completion. This is one of the reasons why projects are separately presented (as mature and non-mature), and compliance forecasting for the 2030 horizon is based on mature projects only. Due to such uncertainties, an expected completion date will be given only for mature projects.

While delays are rather common in infrastructure projects and certainly to be expected, no risk allowance in this regard has been considered, which means that scheduled completion dates and compliance forecasts are given as the best-case (not entirely realistic) scenario.

The Growth Plan for the Western Balkans, adopted by the European Commission on 8 November 2023, underpinned by the Reform and Growth Facility established in May 2024, allocates €6 billion in funding, combining €2 billion in grants and €4 billion in concessional loans, primarily for investments through the Western Balkans Investment Framework (WBIF). More specifically, in **Albania**, the Growth Plan prioritises investments in sustainable transport, such as the Corridor VIII Railway and the Blue Corridor Highway, and promotes the deployment of ITS and e-freight to enhance regional trade flows. **Kosovo** continues rehabilitating its core TEN-T rail network, focusing on Rail Route 10 and the Pristina Airport connection, and exploring funding for a multimodal dry port. **Montenegro** will work to integrate EU standards, including ITS frameworks, by advancing projects like the Bar – Boljare Highway and enhancing the Bar – Vrbnica Railway. In **North Macedonia**, projects on Corridors X and VIII aim to align with EU ITS rules, with further initiatives in e-freight and trade efficiency. **Serbia** is also progressing in ITS and e-freight adoption and investing in key rail projects, notably Rail Route 4 with Montenegro and the Corridor X section Stara Pazova – Šid. These projects are part of the priority projects included in the table below.

The total number of mature and projects under preparation is 80, of which 37 are for roads, 27 for the railway, 14 for waterborne and 2 for airports. The total amount of investment needed is EUR **25,8 billion, EUR 7,475** billion for mature projects and **EUR 17,994** billion for projects under preparation.

Separate Project Fiches for mature projects are included in Annexes.

Table 11. Mature Priority Projects

Core Corridor	TEN-T Network	Regional Partner	Project Name	Investment cost (M€)	Expected Completion
Inland Waterways					
Rhine Danube Corridor	Core Network	Bosnia and Herzegovina	Demining of the right bank of the Sava River in Bosnia and Herzegovina	8.1	2026
Rhine Danube Corridor	Core Network Port	Bosnia and Herzegovina	Reconstruction and Modernisation of the River Port of Brčko, Phase 1	10	2025
Rhine Danube Corridor	Core Network	Serbia	Removal of the sunken German fleet in the Danube River	29.1	2028
Rhine Danube Corridor	Comprehensive Network Port	Serbia	Expansion of the capacity of the Danube River port of Prahovo	36.3	2025
Rhine Danube Corridor	Comprehensive Network Port	Serbia	Expansion and Construction of the Port of Sremska Mitrovica	52	2028
5 projects - TOTAL in M€				**135.5**	
Maritime projects					
	Core Network Port	Albania	Construction of the New Integrated Port in Porto Romano and Transfer of Services, Phase 1	390	2030
WBEM	Comprehensive Network Port	Albania	Construction of the New Integrated Port and Transfer of Services in Triporti, Vlore	60	2028
WBEM		Albania	Establishment of the Vessel Traffic Monitoring and Information System (VTMIS)	6	2025
3 projects - TOTAL in M€				**591.5**	
Railway projects					
WBEM	Core	BIH	Track overhaul of the railway sections Podlugovi- Sarajevo	25	2027
WBEM	Core	BIH	Track overhaul of the railway sections Doboj-Maglaj and Jelina-Zenica	50	2026
WBEM	Core	MKD	Construction works of section Kicevo – Struga	426	2032
WBEM	Core	MKD	Construction works of section Struga – Border with Albania	100	2032
WBEM	Core	SRB	Construction works on the Main Rail station - phase 2	27	2026
WBEM	Core	SRB	Reconstruction of the Resnik - Vrbnica - state border with Montenegro	1400	2030
WBEM	Core	MKD	Construction of Joint Railway Border Crossing Station (JRBS) and access road at Tabanovce between the Republic of North Macedonia and the Republic of Serbia	5.5	2026
7 projects - TOTAL in M€				**2,006**	
Road projects					
WBEM	Core	ALB	AIC Section 1: Murriqan-Balldren	469.41	2030
WBEM	Core	ALB	AIC Section 2: Balldren (starting from Lezha Bypass) - Milot	213.6	2028
WBEM	Core	ALB	AIC Section 9A-2: Fier bypass (Levan) - Pocem	160	2040

Core Corridor	TEN-T Network	Regional Partner	Project Name	Investment cost (M€)	Expected Completion
No	Core	ALB	AIC Section 9B-2: Pocem - Memaliaj	597	2040
No	Core	ALB	AIC Section 10: Memaliaj - Subashi Bridge	260	2030
No	Core	ALB	AIC Section 11: Subashi Bridge - Gjirokaster bypass	66	2040
No	Core	ALB	AIC Section 12A: Gjirokaster bypass	64	2040
No	Core	ALB	AIC Section 13A: Gjirokaster bypass - Kakavije	138	2028
WBEM	Core	BIH	Ivanj-Konjic (Ovcari)-exit from Prenj tunnel (Salakovac)	992	2027
WBEM	Core	BIH	Exit from Prenj tunnel (Salakovac)-Mostar North	188.8	2028
No	Comprehensive	BIH	Improvement and construction of the road route Sarajevo - Foca (Brod na Drini) - Hum (Scepan Polje) with the interstate bridge at the BIH/MNE border	300	
No	Core	BIH	Construction of the expressway section Turbe – Nevica Polje -Lašva	641	
No	Comprehensive	MNE	Berane-Rožaje	55	2028
No	Comprehensive	MNE	Reconstruction of the trunk road Šćepan Polje-Plužine (border crossing with Bosnia and Hercegovina)	139	2027
No	Comprehensive	MNE	Construction of the new bridge over the Tara River between Montenegro and Bosnia and Hercegovina	3	2027
WBEM	Core	MKD	Construction of new express road Romanovce – Stracin	88	2025
No	Comprehensive	MKD	Construction of road section Prilep-Raec Bridge	8.8	2030[5]
No	Comprehensive	MKD	Construction of expressway Bitola – Medzitlija, including Bitola interchange	50	2030[6]
No	Comprehensive	MKD	Construction of motorway Veles – Prilep	295	2025
WBEM	Core	MKD	Rehabilitation of road section Gevgelija-Greek border (Bogorodica)	1.5	2030[7]
WBEM	Core	MKD	Rehabilitation of road section Negotino – TEC Negotino	8	2030[8]
WBEM	Core	MKD	Rehabilitation of road section Gradsko – Stobi	4.5	2030[9]
22 projects TOTAL in M€				**4,742.61**	
37 projects - Overall TOTAL in M€				**7,475.61**	

This list does not cover ongoing and finance-secured projects mentioned in the TEN-T Annual Report 2024. These mature projects are expected to improve connectivity within the region and with the EU Member States by creating more efficient transport systems. They will provide economic opportunities that will result in positive

5 For the projects in North Macedonia, that the completion deadline was not provided, the deadline 2030 was included by the Transport Community Secretariat
6 Same as above
7 Same as above
8 Same as above
9 Same as above

multiplier effects, such as better accessibility to markets, employment, and additional investment. Investment in rail and inland waterways will contribute further to the region's decarbonisation efforts by increasing the competitiveness of these modes of transport. Improving road infrastructure will shorten travel time and reduce travel costs for businesses and the public while contributing to safer roads in the region.

Table 12. Priority Projects under preparation

Core Corridor	TEN-T Network	Regional Partner	Project Name	Project cost (M€)
Railway projects				
n/a	Comprehensive	ALB	Construction of the new railway Pogradec – Korca – Greek border	240
WBEM	Core	ALB	Rehabilitation of the railway Rogozhine-Pogradec-Lin	220
n/a	Core	ALB	Rail connection with Porto Romano	15
WBEM	Core	SRB	Reconstruction and modernisation of the railway line Brestovac – Preševo – border with North Macedonia	700
WBEM	Core	SRB	Reconstruction and modernisation of the two-track railway line Stara Pazova – Šid - border with Croatia and section Golubinci – Inđija	740
n/a	n/a	SRB	Construction of the by-pass railway line Beli Potok – Vinca – Pancevo with a road-railway bridge over the Danube River near Vinca	300
WBEM	Core	SRB	Reconstruction of the railway bypass around Belgrade, Batajnica – Ostruznica – Beograd Ranzirna	183
WBEM	Core	SRB	Reconstruction and modernisation of single-track railway Belgrade-Nis	2,775
WBEM	Core and Comprehensive	SRB	Reconstruction and modernisation of the railway line Lapovo- Kraljevo – Rudnica	440
n/a	Core	SRB	Reconstruction and modernisation of the railway line Stalać – Kraljevo	290
Rhine Danube	Core	SRB	Reconstruction and modernisation of the railway line Pančevo – Vršac	425
WBEM	Core	MNE	Reconstruction Podgorica - Tuzi - Border Albania	84.4
WBEM	Core	MKD	Renewal and/or reconstruction works on Railway Corridor X	200
N/a	Comprehensive	KOS	Construction of line Pristina - Airport	40.2
n/a	Comprehensive	KOS	General Rehabilitation of the Eastern Railway line (CCP with Serbia – Podujevo – Fushe Kosove)	67.3
WBEM	Core	BIH	Rehabilitation of railway section Visoko – Konjic	340
WBEM	Core	BIH	Track Overhaul of Railway Section Podlugovi- Zenica	24
WBEM	Core	BIH	Rehabilitation of section Doboj-Maglaj-Rasputnica Miljacka	1,500
n/a	Comprehensive	BIH	Rehabilitation of Doboj-Tuzla-Brčko	323
n/a	Comprehensive	BIH	Rehabilitation and Modernisation of the railway section Banja Luka – Doboj –Tuzla- Zvornik – Serbian border	279
20 rail projects Total in M€			**Total mil EUR**	**9,185.7**

Road projects				
WBEM	Core	ALB	Rehabilitation of Corridor VIII, connection with Northern Macedonia. Section Elbasan - Pika Doganore Skenderbej, Rrajce	995
WBEM	Core	ALB	Rehabilitation of the Elbasan - Lekaj road section part of Corridor VIII	360
WBEM	Core	ALB	Construction of the Bushtrice - Cross border Point road section part of Corridor VIII	216
WBEM	Core	ALB	Construction of Elbasan bypass	200
No	Core	ALB	Widening and completeness of the Milot-Rreshen road section	60
No	Core	ALB	Rehabilitation of the Fier-Frataj road section	40
No	Core	BIH	Betterment of the main road section (bypass) Banja Luka - Jajce - Lašva	169
No	Core	BIH	Construction of the interstate bridge over the Sava River in Gradiska	146
No	Comprehensive	BiH	Construction of expressway Sarajevo – Visegrad - Border BiH/SRB	1145
WBEM	Core	MNE	Highway Bar-Boljare - section Matesevo-Andrijevica	562
WBEM	Core	MNE	Highway Bar-Boljare - section Andrijevica – Boljare	885
WBEM	Core	MNE	Highway Bar-Boljare - section Smokovac – Tolosi – Farmaci (Podgorica bypass)	180
WBEM	Core	MNE	Highway Bar-Boljare - section Djurmani - Farmaci	900
No	Core	MNE	“Blue highway” - expressway along Montenegrin coast	1475
No	Comprehensive	SER	Construction of highway E-761 / M-5 / Bosnia and Herzegovina Border-Kotroman-Uzice-Pozega	1100
15 projects Total in M€				**8,433**
Inland waterways projects				
Rhine Danube Corridor	Core Network	Serbia and Bosnia & Herzegovina	River training and dredging works on critical sectors of the Sava River.	9.3
Rhine Danube Corridor	Core Network	Serbia	River training and dredging works on critical sectors on the SRB-CRO joint stretch on the Danube.	48.5
Rhine Danube Corridor	Core Network Port	Serbia	New Port of Belgrade and Free Trade Zone	190
3 projects Total in M€				**247.8**
Maritime projects				
WBEM	Core Network Port	Albania	Establishment of the VTMIS, Phase II	5
WBEM	Core Network Port	Montenegro	Upgrading infrastructure at the Port of Bar	22,5
WBEM	Core Network Port	Montenegro	Digitalisation of the Port of Bar project	4.8
3 projects Total in M€				**32.3**
Airport projects				
Podgorica	Core	MNE	Podgorica Airport Development	94.84
Nis	Core	SER	Nis Airport” construction and modernisation project	
Total in M€				**94.84**
Overall Total in M€				**17,994.14**

Figure 13. Railway ongoing, mature and projects under preparation

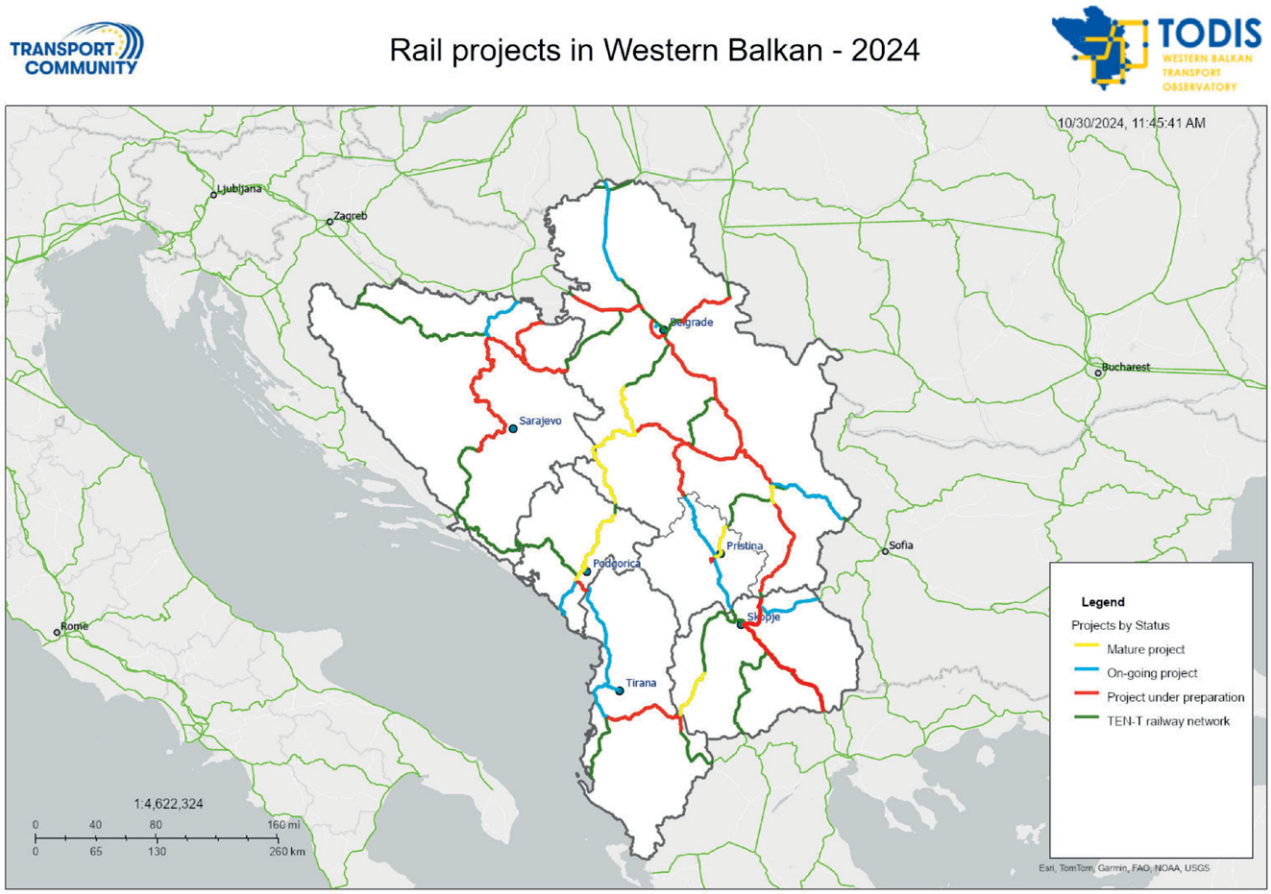
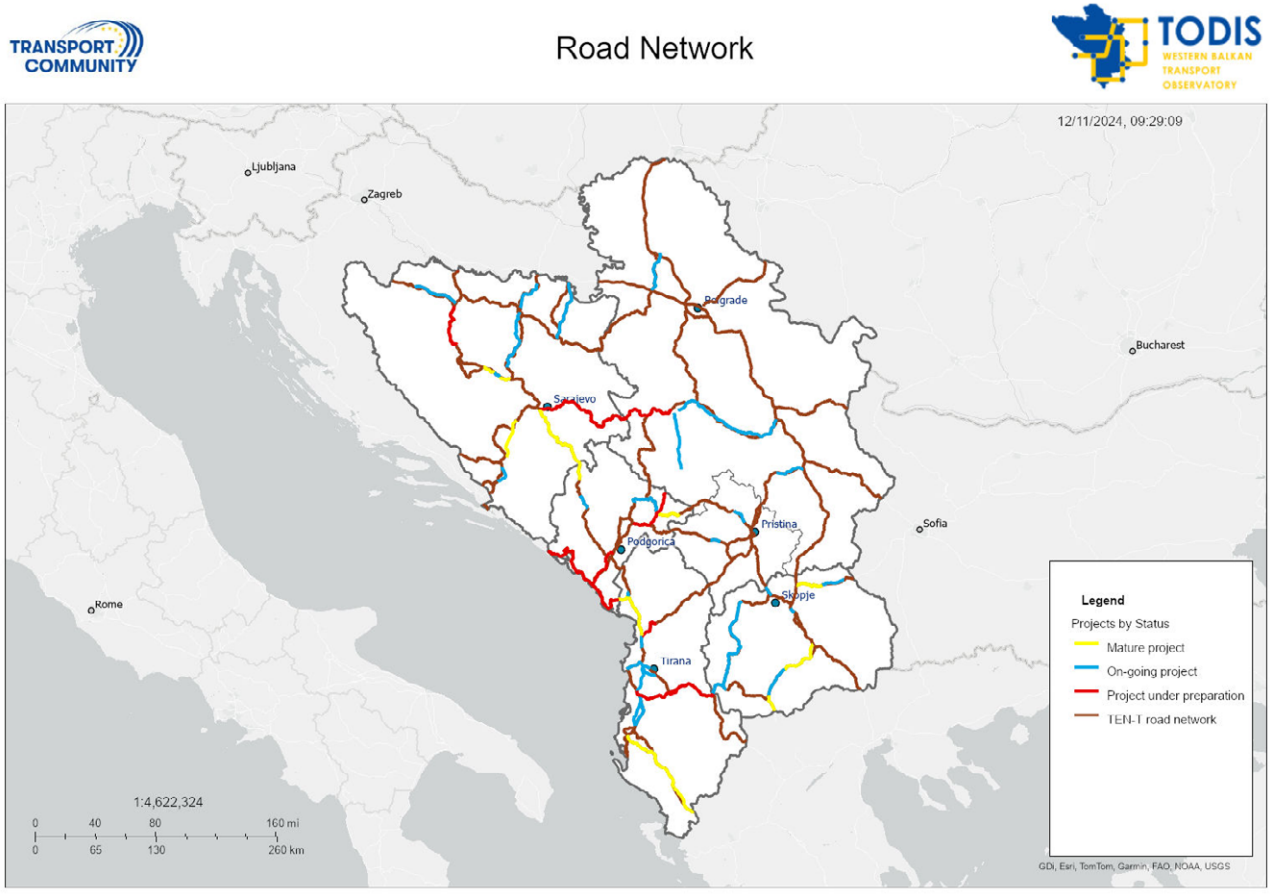


Figure 14. Road ongoing, mature and projects under preparation



4. Gap Analysis (comparing non-compliant sections with the priority project list)

4.1. Methodology

The gap analysis aims to achieve two key objectives to identify the **action gap** necessary to complete the Core and Comprehensive Network by the deadlines stipulated in the EU Regulation 2024/1679 (2030 for Core Network, 2040 for Extended Core Network) and to identify sections of the network that are **not included** in the existing strategic framework but are critical for network completion and compliance with the regulation. To carry out the gap analysis effectively, the following strategic documents and data sources have been collected and reviewed:

- **Single Project Pipeline (SPP)**: Review projects related to the Core and Comprehensive Networks, focusing on projects in the planning stage and those under preparation or implementation.
- **Economic and Investment Plans (EIP)**: Analyse how investments are aligned with Core and Comprehensive Network completion goals.
- **National Transport Strategies (NTS)**: Assess each participating country's transport strategy, identifying discrepancies or omissions regarding network priorities.
- **EU and International Funding Sources**: Examine commitments and allocations from EU sources (e.g., IPA III, CEF), as well as national and international funding mechanisms.

By benchmarking non-compliant sections of the network against these strategic documents, the analysis will determine whether all required sections are accounted for and identify any missing components not included in national or regional transport frameworks.

An assessment will be conducted for any missing sections to determine their strategic importance, focusing on factors such as connectivity with the Core Corridor, contribution to regional development, and alignment with EU transport priorities like sustainability, digitalisation, and multimodality. This will help prioritise the missing sections and provide justification for their inclusion in future strategic planning.

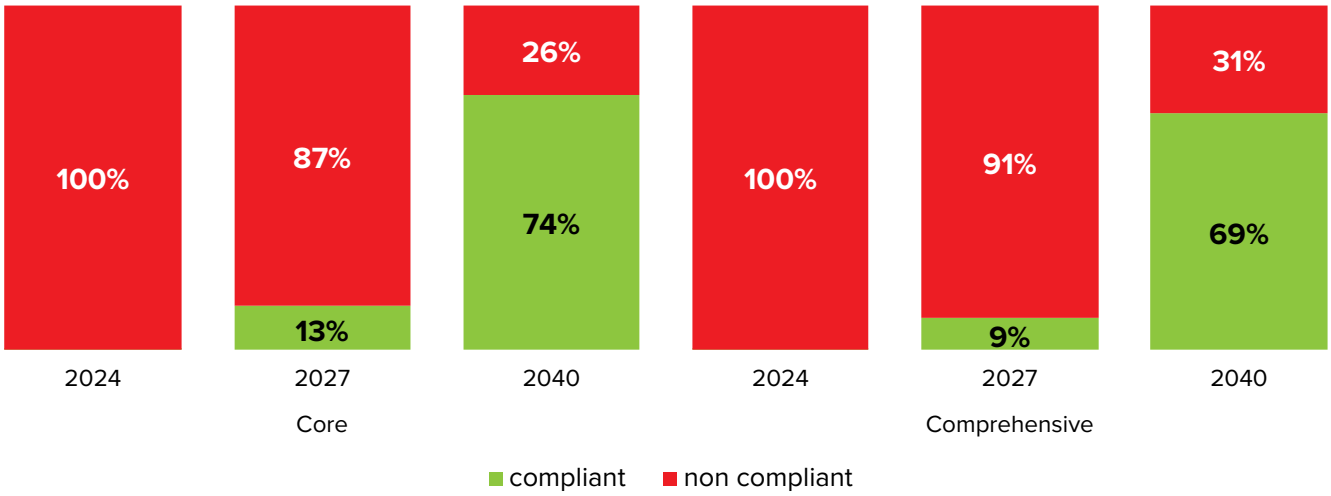
4.2. Railways Gap Analysis

This analysis aims to identify and evaluate gap sections within the Core and Comprehensive Networks as defined by EU Regulation 1679/2024. These gap sections are infrastructure segments that fail to meet required standards for profile and condition, are misaligned with strategic objectives, and lack the planning tools needed to achieve compliance with the regulatory deadlines of 2030 for the Core Network and 2050 for the Comprehensive Network.

After taking into account the impact of all projects outlined in the Single Project Pipelines (SPP) and the Economic and Investment Plans (EIP) in the Region and assuming that network sections not impacted by these projects will maintain their current performance levels, the forecasted outcomes are presented below.

The following figure illustrates network compliance, showing the extent to which all compliance indicators are met. It reveals that 74% of the Core and 69% of the Comprehensive network will fully comply with all indicators specified in Regulation 1315/2013. However, the primary constraints in achieving full compliance across the network are the implementation of the ERTMS and the Train Length requirements. Below, a detailed outlook on each indicator separately is presented.

Figure 15. **Full Network Compliance Outlook**



The sections where all the Compliance indicators are not expected to be fulfilled since no planned projects are given in the following table.

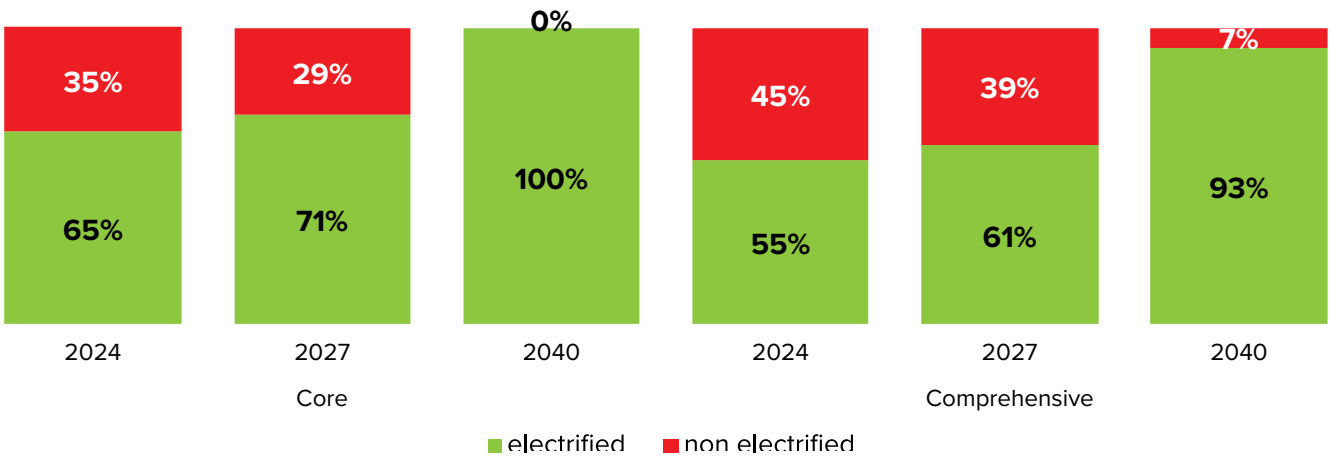
Table 13. Sections which will be missing all Compliance indicators

From	To	Regional Partner	Network Layer
Rogozhine	Vlore	**Albania**	Comprehensive
Capljina	Border with Montenegro	**Bosnia and Herzegovina**	Comprehensive
Doljevac	Merdare	**Serbia**	Comprehensive

All the other sections are missing one of the indicators, most usually ERTMS, train speed or freight train length.

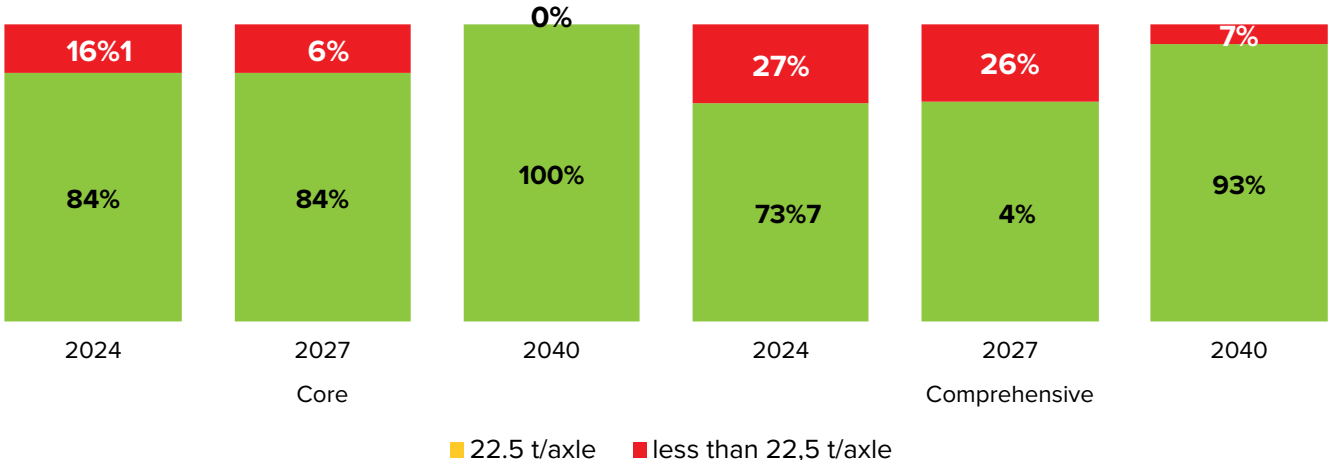
In terms of **Electrification**, only the sections presented in Table 14 will be missing electrification. Those sections represent only 11% of the Comprehensive network, and the Core network is expected to be compliant, as presented in the Figure below.

Figure 16. **Electrification Outlook**



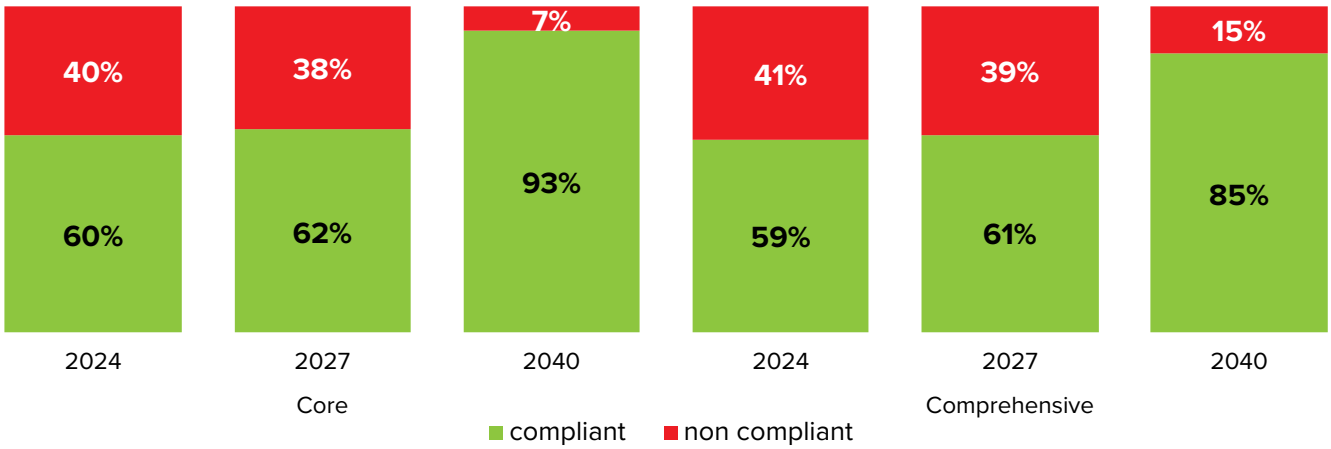
In terms of the **Axle Load**, the whole Core Network is expected to be compliant, as well as 93% of the Comprehensive Network. Those sections are the same as presented in Table 14.

Figure 17. **Axle Load Outlook**



For the **Freight Line Speed** indicator, 93% of the Core Network and 85% of the Comprehensive Network will be compliant.

Figure 18. **Freight Line Speed Minimum 100 km/h Outlook**



The sections that are not compliant with this indicator are given in the following Table.

Table 14. Sections which will be uncompliant with the speed indicator

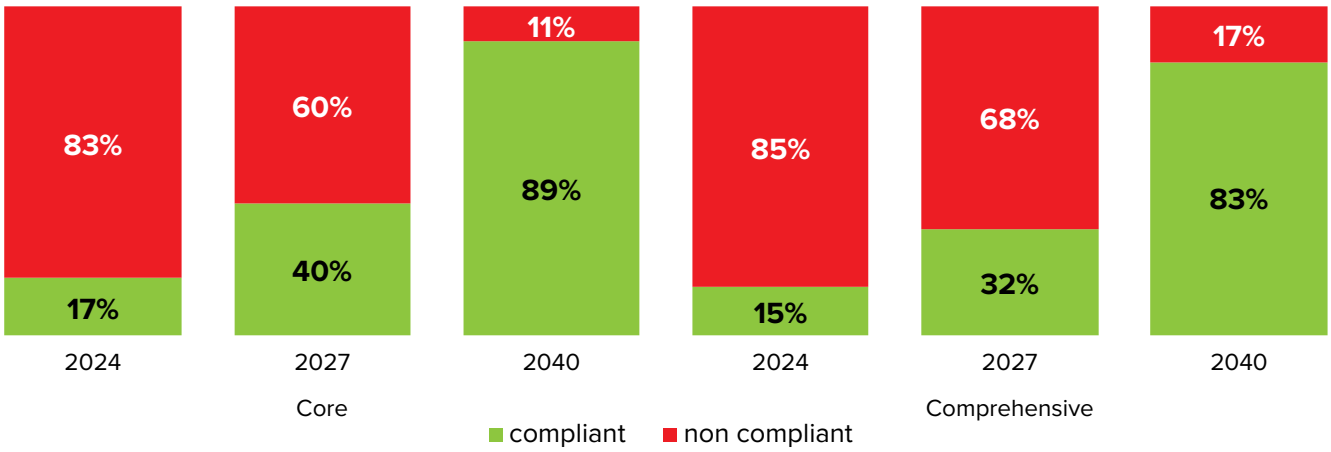
From	To	Regional Partner	Network Layer
Rogozhine	Vlore	**Albania**	Comprehensive
Konjic	Capljina	**Bosnia and Herzegovina**	Core
Capljina	Border with Montenegro	**Bosnia and Herzegovina**	Comprehensive
Podgorica	Border with Bosnia and Herzegovina	**Montenegro**	Comprehensive
Beograd Centar	Lazarevac	**Serbia**	Core
Kraljevo	Rudnica	**Serbia**	Core
Doljevac	Merdare	**Serbia**	Comprehensive

In terms of the **Minimal Operational Speed of 100 km/h** and more, the Network in the future shall look as presented in Figure 20. Out of those figures, it is evident that the Network's operational speed will be compliant with the speed indicators on 89% of the Core Network and 83% of the Comprehensive Network.

Table 15. Sections where the operational speed will be uncompliant with the speed indicator

From	To	Regional Partner	Network Layer
Rogozhine	Vlore	**Albania**	Comprehensive
Konjic	Capljina	**Bosnia and Herzegovina**	Core
Capljina	Border with Montenegro	**Bosnia and Herzegovina**	Comprehensive
Vrbnica	Bar	**Montenegro**	Core
Podgorica	Border with Bosnia and Herzegovina	**Montenegro**	Comprehensive
Beograd Centar	Lazarevac	**Serbia**	Core
Kraljevo	Rudnica	**Serbia**	Core
Doljevac	Merdare	**Serbia**	Comprehensive

Figure 19. **Operational Speed Minimum 100 km/h Outlook**



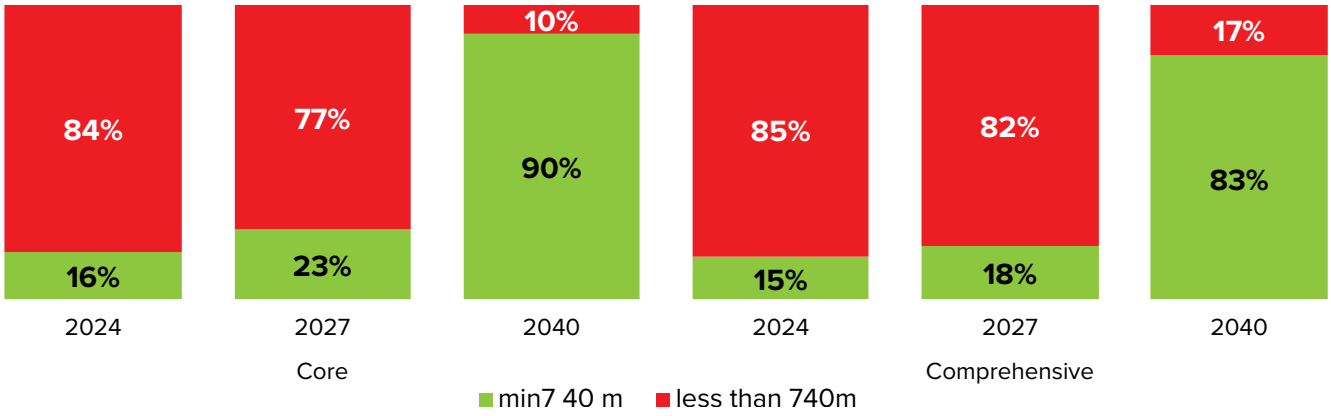
Regarding the **Freight Train Length** parameter, a notable shift is expected, with 90% of the Core network compliant with the requirement for accommodating 740 meters or longer trains on the network. Having in mind that the latest TEN-T Regulation describes better how this compliance indicator shall be operationalized, we believe that when the Regional Partner implements it, this outlook shall look even better. This is an important fact, since no one of the most limiting compliance indicators is this one, not allowing the whole network to be 100% compliant with the Regulation 1315/2013.

Out of the whole network, the sections without plans for fulfilling this indicator are shown below.

Table 16. Sections which will be uncompliant with the train length indicator

From	To	Regional Partner	Network Layer
Rogozhine	Vlore	**Albania**	Comprehensive
Konjic	Capljina	**Bosnia and Herzegovina**	Core
Samac	Doboj	**Bosnia and Herzegovina**	Core
Capljina	Border with Montenegro	**Bosnia and Herzegovina**	Comprehensive
Vrbnica	Bar	**Montenegro**	Core
Podgorica	Border with Bosnia and Herzegovina	**Montenegro**	Comprehensive
Beograd Centar	Pancevo	**Serbia**	Core
Kraljevo	Rudnica	**Serbia**	Core
Resnik	Valjevo	**Serbia**	Core
Subotica	Horgos	**Serbia**	Comprehensive
Doljevac	Merdare	**Serbia**	Comprehensive
Zemunsko Polje	National Stadium	**Serbia**	Core

Figure 20. **Train Length Outlook**



Since the railway network in the Region was built on the normal gauge basis (1435mm), the Region is now and will remain fully compliant with the **Track Gauge** indicator.

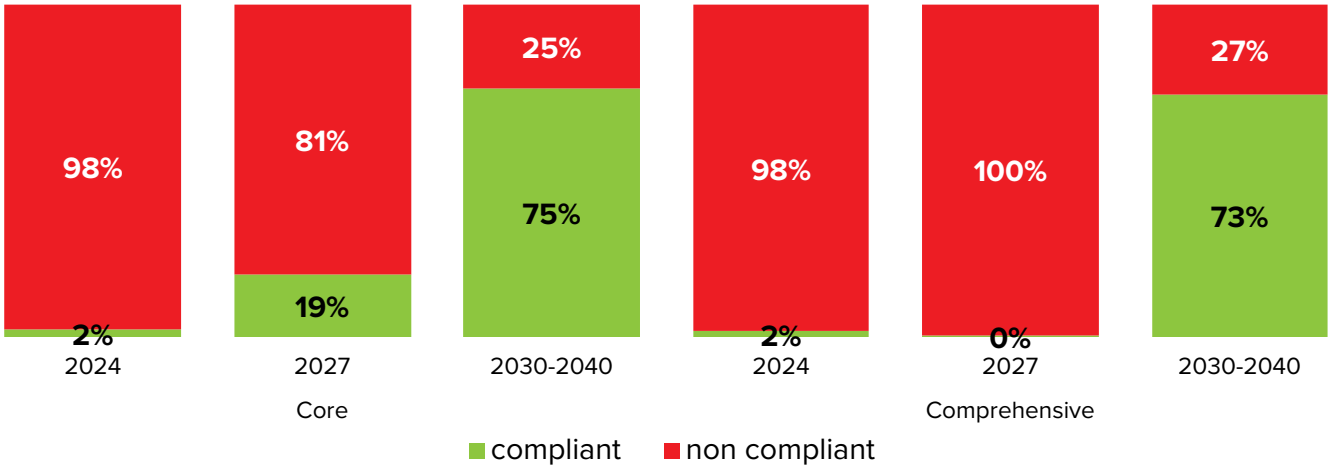
The most limiting factor for full compliance is the **ERTMS**. The actual operation of ERTMS in the region started in 2023 for the first time. Therefore, the progress on this indicator will not be the same as the other indicators, but it will be substantial. It is especially important that out of all the sections that will not be compliant there are sections where there are already ongoing projects, and ERTMS was not envisaged, or there are no planned projects.

With this in mind, 75% of the Core and 73% of the Comprehensive Network shall be equipped with an ERTMS system.

Table 17. Sections which will be uncompliant with the ERTMS indicator

From	To	Regional Partner	Network Layer
Rrogozhine	Vlore	**Albania**	Comprehensive
Tuzla	Zvornik	**Bosnia and Herzegovina**	Comprehensive
Konjic	Capljina	**Bosnia and Herzegovina**	Core
Capljina	Border with Montenegro	**Bosnia and Herzegovina**	Comprehensive
Podgorica	Niksic	**Montenegro**	Comprehensive
Lutovo	Bar	**Montenegro**	Core
Beograd Centar	Pancevo	**Serbia**	Core
Valjevo	Zvornik	**Serbia**	Core
Kraljevo	Rudnica	**Serbia**	Core
Subotica	Horgos	**Serbia**	Comprehensive
Stalac	Kraljevo	**Serbia**	Core
Doljevac	Merdare	**Serbia**	Comprehensive

Figure 21. **ERTMS Outlook**



4.3. **Road Gap Analysis**

This analysis focuses on identifying and assessing gap sections within the Core and Comprehensive Network as per EU Regulation 1679/2024. These gap sections represent uncompliant infrastructure segments (profile and conditions) currently unaligned with strategic frameworks and lack the necessary planning tools to meet the regulatory deadlines 2030 for the Core Network and 2050 for the Comprehensive Network.

A review of the network identified several road sections not part of the Single Project Pipeline (SPP) and Economic and Investment Plans (EIP) and on the list of mature and under-preparation projects, indicating that these sections lack strategic planning:

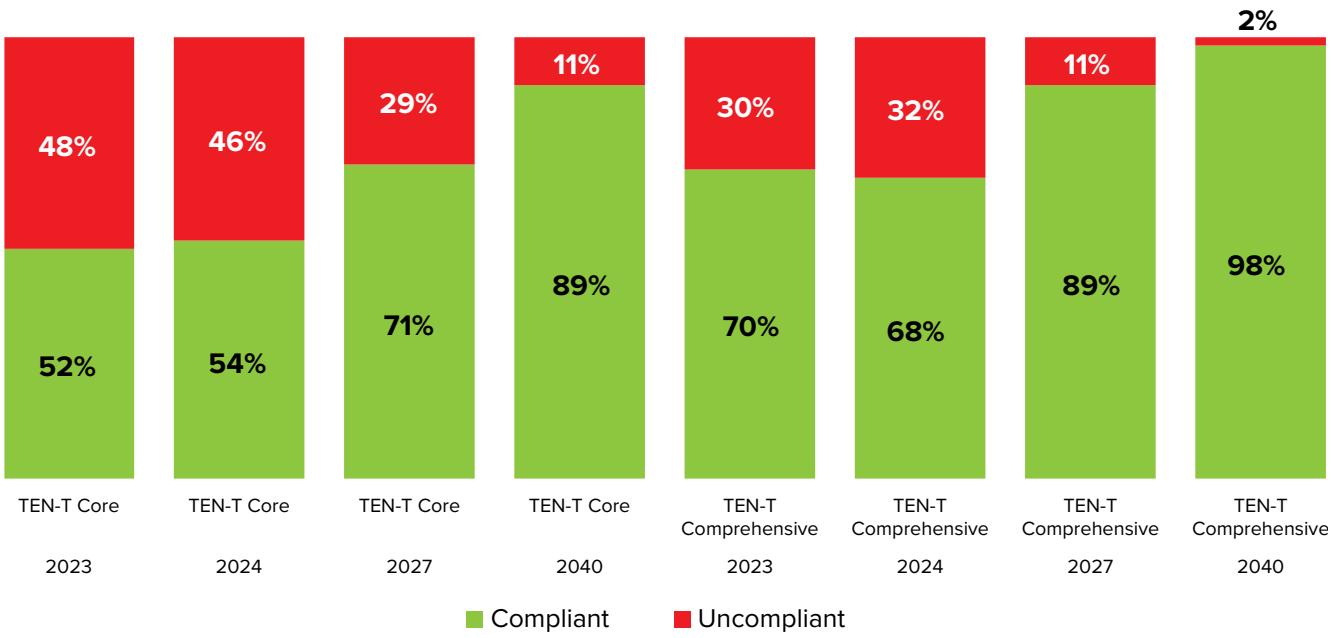
Table 18. Road infrastructure gap sections

From	To	Regional Partner	Network Layer	Length (km)
Perrenjas	Pogradec	**Albania**	Comprehensive	27
Pogradec	Korce	**Albania**	Comprehensive	40
Tuzla	Zvornik	**Bosnia and Herzegovina**	Comprehensive	56
Peje/Pec	Montenegro border	**Kosovo**	Comprehensive	26

These sections count for 149 km in total in Albania, Bosnia and Herzegovina, and Kosovo, which currently fall outside of formal planning initiatives, suggesting a need for inclusion in future national and regional strategic documents.

The current and forecasted compliance rates for the TEN-T Core and Comprehensive Networks reflect the achievements and remaining gaps. The table below summarises the expected progression toward compliance, assuming gap sections are addressed within strategic planning and funding allocations:

Figure 22. **Road Network Compliance 2040**



Addressing the identified gap sections is essential to meet TEN-T compliance objectives. By integrating these sections into strategic frameworks and securing adequate funding for both ongoing and upcoming projects, the projected 89% compliance rate for the Core Network is anticipated to be achieved by 2040. Meanwhile, the remaining 2% of the Comprehensive Network projected to be non-compliant in 2040 can be expected to reach full compliance by 2050.

The infrastructure gaps, combined with the financial shortfall of €13 billion for projects that are either mature or under preparation, place additional pressure on the region. This situation is further exacerbated by the limited fiscal space available for borrowing, which restricts the ability to secure necessary funds. While the commitments to achieve core network compliance by 2030 and comprehensive network compliance by 2050 remain official targets, the forecast appears increasingly challenging and perhaps unrealistic, given the current financial constraints. Addressing these funding gaps will require innovative financing solutions, better donor coordination and stronger regional cooperation to keep the long-term goals on track.

4.4. Waterborne Gap Analysis

This analysis evaluates gap sections within the Core and Comprehensive Networks as specified in EU Regulation 1679/2024. These gap sections represent infrastructure segments that are currently non-compliant in terms of profile and condition, and lack the required planning tools to achieve the regulatory targets of 2030 for the Core Network and 2050 for the Comprehensive Network.

Inland Waterways Network

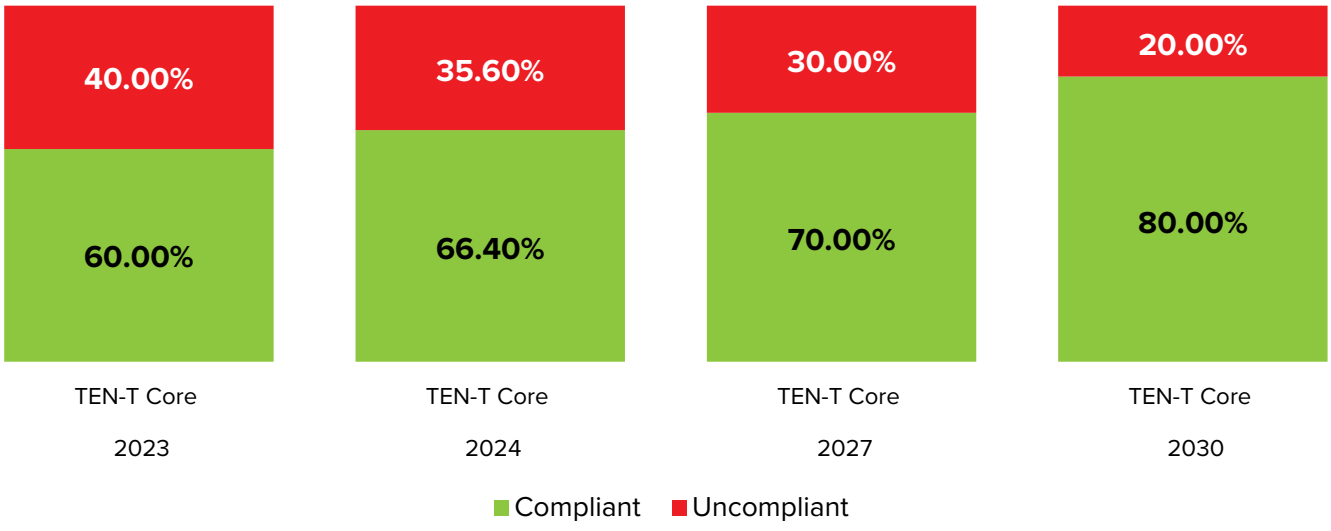
A review of the Sava River highlights multiple segments that do not meet the standards set by Regulation 1679/2024, particularly in terms of maintaining Good Navigation Status (GNS). Compliance with the TEN-T requirements—especially CEMT standards—is essential to achieve navigability across the full river length. Approximately 180.7 km of the Sava, representing 35% of its length, fails to meet the required draft depth, with 31 critical sections identified.

Table 19. Gap Analysis for Sava River

River	Downstream km	Upstream km	Regional partner	Section length	CEMT Class	RIS
Sava	**176.0**	**196.0**	Serbia – Bosnia & Herzegovina	20.0	III	Yes
Sava	**313.7**	**338.2**	Croatia – Bosnia & Herzegovina	24.5	III	Yes
Sava	**371.2**	**594**	Croatia – Bosnia & Herzegovina	222.8	III	Yes
Tisa	**0.0**	**164.0**	Serbia	164.0	IV	No

To address these issues, Regional Partners should collaborate with Croatia, an EU neighbour, to consider a joint application for a CEF (Connecting Europe Facility) call, aiming to develop a main project for the shared sections of the Sava in Croatia and Bosnia and Herzegovina. Alternatively, Regional Partners could apply via the International Sava Basin Commission for Phase II of the Sava and Drina Rivers Corridors Integrated Development Program (SDIP). These initiatives would facilitate the comprehensive development needed to meet TEN-T standards along the Sava River.

Figure 23. **The forecast for the TEN-T Compliance from the Inland Waterway network**



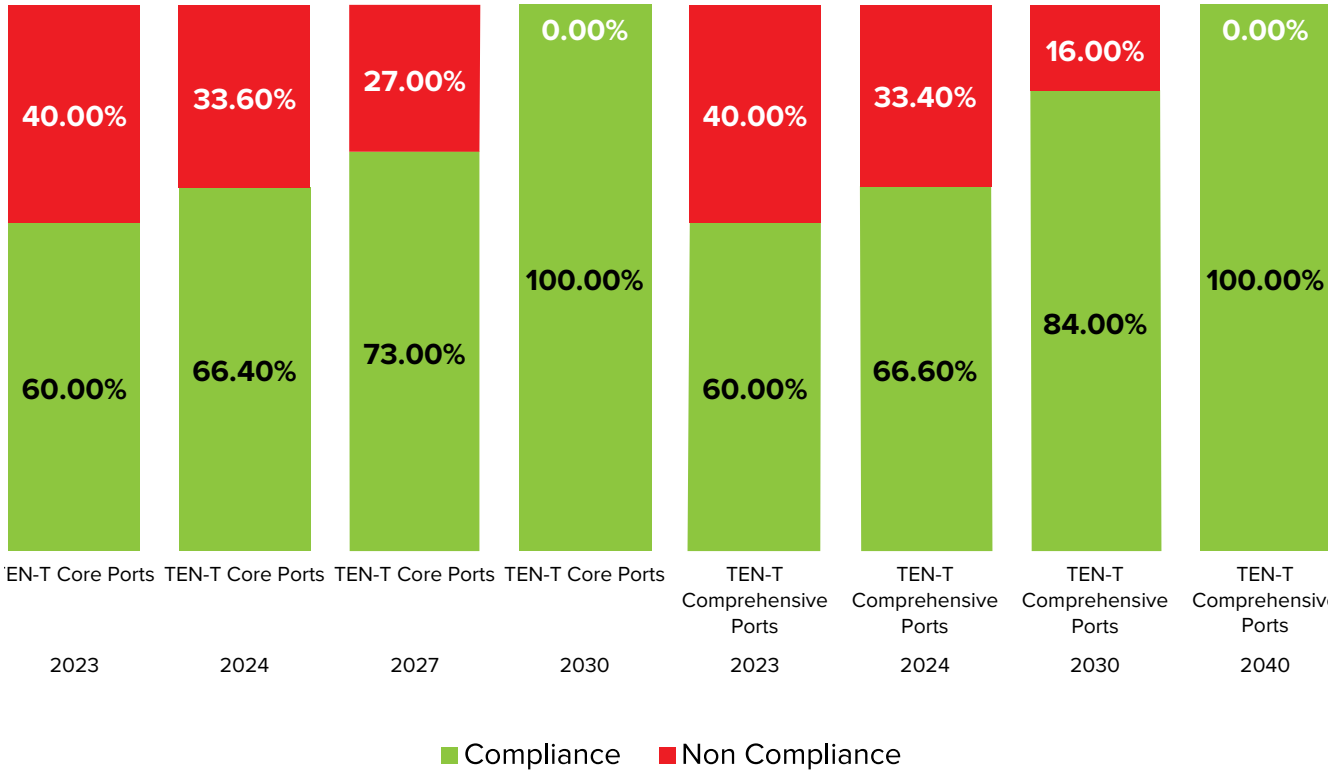
Inland Waterway Ports

The report highlights a significant gap in the TEN-T Network's inland waterway ports in meeting standards for clean fuel availability and environmental performance. Currently, these ports lack essential infrastructure, including clean fuel facilities, waste reception, container degasification, and noise reduction technologies.

To address this, Regional Partners should prioritise feasibility studies to evaluate the practical and economic viability of implementing alternative fuel infrastructure (such as LNG, hydrogen, and shore power supply) and environmental improvements. To align with environmental standards, these studies should assess each port's infrastructure needs for clean fuel compatibility, waste disposal, degasification, and noise reduction.

Upgrading this infrastructure will position TEN-T ports as sustainable, resilient hubs, enhancing regional development and attracting EU and international funding for environmental initiatives, supporting long-term sustainability in inland waterway transport.

Figure 24. **Compliance forecast for the Inland Waterway Ports**



4.5. **Airport Gap Analysis**

The gap analysis assesses the current and planned airport infrastructure projects within the Western Balkans to identify areas of non-compliance with the TEN-T Core and Comprehensive Network standards as outlined in EU Regulation 1679/2024. This evaluation focuses on ensuring alignment with regulatory deadlines 2030 for the Core Network and 2050 for the Comprehensive Network, considering compliance, strategic alignment, and sustainability.

The analysis highlights **several areas where infrastructure standards are not fully met**. For example, a significant gap **exists in railway connections across regional airports**, a critical compliance requirement for multimodal connectivity within the TEN-T framework. While Tirana Airport's planned connection to the Durres - Tirana rail line addresses this need, other airports, such as Podgorica and Sarajevo, currently lack similar initiatives. **Expanding rail connectivity across the region's airports is essential to ensure full alignment with EU standards and support a cohesive, multimodal transport network.**

Alternative fuel availability is still under development across the region. Although some airports, like Belgrade and Sarajevo, offer limited clean fuel options for ground services, further infrastructure improvements will be needed to fully align with the EU's decarbonisation goals and the Green Deal as market demand for these solutions grows.

The analysis of current and planned projects reveals a strong focus on modernisation and capacity building. Ongoing projects, such as the **modernisation of Belgrade's Nikola Tesla Airport and the expansion of Niš Airport's terminal**, indicate progress but may require additional checks to ensure full TEN-T compliance. Meanwhile, preparatory projects like the Podgorica Airport Development project, though comprehensive in scope and aligned with national strategies, could benefit from further refinement, particularly regarding railway and fuel infrastructure, to ensure regulatory compliance. Some projects under preparation, such as the New Rapid Exitway at Sarajevo Airport and various apron extensions, focus predominantly on capacity enhancement. However, they would benefit from additional sustainable features aligned with the Sustainable and Smart Mobility Strategy, to improve alignment with broader EU objectives.

Policy and strategic alignment remain another critical factor. The ongoing focus on capacity expansion aligns with national and regional transport strategies. Yet several projects lack explicit measures to ensure sustainable practices aligned with the European Green Deal and the EU Sustainable and Smart Mobility Strategy. For instance, the EU has stipulated that investments in airport capacity should prioritise green initiatives over expansion alone. Incorporating environmental and digital upgrades, such as environmental impact assessments and automated safety and efficiency systems, would further align these projects with EU policy goals, supporting long-term sustainability in the sector.

Projects across the Western Balkans' airports vary in maturity and funding status. While some projects, like the Tirana Airport expansion and the Durres - Tirana rail link project, are already funded and progressing, others, such as the Airport Rescue and Firefighting Center at Belgrade Airport, are still in the process of securing all necessary project documentation. A gap in resource allocation remains evident, particularly for green infrastructure components such as clean fuel availability and, crucially, for railway connections. Addressing these gaps may be facilitated by leveraging EU funding sources and aligning with EU frameworks to meet the TEN-T requirements.

This gap analysis underscores the importance of addressing compliance issues across the Western Balkans' airports to meet TEN-T and EU policy standards and achieve a more sustainable, multimodal transport network by 2030 for the Core Network and 2050 for the Comprehensive Network.

5. Transport Policy

5.1. Sustainable and Smart Mobility Strategy for Western Balkans

The **Sustainable and Smart Mobility Strategy (SSMS)** for the Western Balkans aligns with the EU's Green Deal, which targets climate neutrality by 2050 and mandates a 90% reduction in greenhouse gas emissions from the transport sector. Achieving these goals demands a shift towards sustainable, smart, and resilient transport systems in the Western Balkans, aligning with EU environmental and transport policies to strengthen regional integration into the European single market.

Structured around three core pillars—**Sustainable Mobility, Smart Mobility, and Resilient Mobility**—the SSMS sets out ten flagship initiatives to support green technology adoption, digital transformation, and infrastructure resilience. Alignment with the EU's Green Deal and TEN-T Network is essential for enhancing regional connectivity, boosting economic growth, and reducing environmental impact.

The implementation of this strategy has seen notable strides. However, challenges in **governance, legislative alignment, and infrastructure investment** continue to hinder full alignment with EU policies. The Western Balkans still lack robust governance structures that can facilitate effective implementation of transnational projects. For instance, varying national policies and institutional frameworks create discrepancies in executing regional initiatives, such as integrated alternative fuel infrastructure or rail projects, slowing the harmonisation process. While some national transport strategies have been updated to include green and smart elements, **digitalisation**, **alternative fuel infrastructure**, and **integrated urban planning** remain areas needing more substantial financial commitment and alignment with EU standards.

Policy expectations for the next five years

Through its flagship initiatives, the Western Balkans can advance toward a sustainable and inclusive transport system that meets EU Green Deal goals while addressing regional challenges. To achieve a sustainable, smart, and resilient transport sector in the Western Balkans, targeted actions are needed across governance, infrastructure, and digitalisation. The following recommendations outline priority steps to align regional efforts with EU Green Deal objectives and enhance the region's transport systems.

- Accelerating Sustainable Mobility: Full adoption of AFIR and incentives for zero-emission vehicles are crucial. Expansion of SUMPs in urban nodes, emphasising public transit, cycling, pedestrian infrastructure, and multimodal solutions, will foster sustainable urban mobility and multimodal connectivity.
- Advancing Smart Mobility Initiatives: Digital transformation in transport requires completing ITS legislation and establishing robust data governance. A Digital Mobility Centre of Excellence would drive data-driven innovation and foster collaboration between governments, research institutions, and tech partners.
- Enhancing Resilient Infrastructure: Allocating resources for climate-proofing vulnerable segments is essential for stability. Climate resilience should be embedded into TEN-T projects, and climate plans adopted at the public company level to enhance preparedness.
- Improving Governance and Legislation: Strengthening cross-border governance and harmonising legal frameworks, particularly for ITS and alternative fuels, will create a coordinated approach. National Access Points (NAPs) can improve data integration, with capacity-building for public authorities supporting cohesive implementation.

- Leveraging EU and Regional Funding Opportunities: Utilising funding from WBIF, Horizon Europe, INTERREG, Safe and Sustainable Transport Programme, and IPA III will maximise investments in clean mobility and multimodal solutions. Setting KPIs will help monitor progress and ensure measurable outcomes.
- Promoting Social Inclusion and Just Transition: Continue efforts to promote gender equality, workforce diversity, and social inclusion in the transport sector. Implement the 2023 Action Plan for Social Issues and Passenger Rights to ensure workers' rights, a fair transition for transport workers, and passenger rights across the Western Balkans.

5.2. **Railway**

Of the first set of connectivity reform measures agreed back in 2015, opening a railway market is one of the most important and integral parts of the Transport Community Treaty. **With four out of six Regional Partners having opened a domestic railway market**, the region has moderately progressed, and there are 14 private railway undertakings in three Regional Partners. Their market share is around 40% in Serbia, 80% in Albania and limited in Montenegro and Kosovo. The only two Regional Partners lagging are **Bosnia and Herzegovina** and **North Macedonia**. Unfortunately, **North Macedonia** opened the market in 2023 and closed it in 2024.

Further efforts are needed in the area of **passenger rights.** In terms of **Governance** and coordination among all partners (Infrastructure Managers and Railway undertakings) and other stakeholders, there was strong progress made with the establishment of the Rail Infrastructure Managers Network for the WB with the signing of the MoU by the Infrastructure Managers from the Western Balkans and the signing of a Dedication to the Railway by the Ministers.

There has been moderate progress in the **Interoperability** and implementation of the **technical pillar** of the **4th Railway package** by all Regional Partners, with work still to be done. Full details on the progress of each Regional Partner are given in the Progress Report on the implementation of the Rail Action Plan.

Over the next five years, the Western Balkans region will face several key challenges and objectives for the development of its railway sector. The primary aim is to open the railway market fully, aligning with EU legislation on interoperability and improving governance structures within the sector. The main policy expectations are as follows:

- **Market Access**. The focus will be on establishing a common rail market by aligning fully with EU standards and Transport Community Treaty (TCT) provisions. This includes opening domestic and regional markets, establishing key regulatory bodies such as National Safety Agencies (NSAs) and Railway Regulatory Agencies (RRAs), and ensuring infrastructure managers have management and financial independence. Actions also include implementing public service obligation contracts for passenger transport and securing multi-annual contracts for infrastructure stability and improved management.
- **Train Driver Licensing**. Improving safety and operational standards through train driver licensing will be a priority. This involves transposing EU directives and regulations for driver certification, establishing licensing models, and equipping examination centres to meet high safety standards. The aim is for all partners to adopt and fully implement these measures by 2026.
- **Interoperability.** For integration with the European Trans-European Transport Network (TEN-T), regional partners will adopt the EU's 4th Railway Package and implement Technical Specifications for Interoperability (TSIs). Efforts include establishing electronic registers in the European Vehicle Register (EVR) and Railway Infrastructure Register (RINF) to streamline cross-border operations, enhance connectivity, and reduce border waiting times.
- **Railway Safety.** Safety improvements will target mutual recognition of operating licences, train driver certifications, and vehicle authorisations, alongside implementing a Safety Management System. Establishing certified maintenance facilities and a unified regulatory approach will support consistent operations across the region. These measures, expected by 2027, will enhance safety standards, regulatory compliance, and regional coordination.

- **Modernisation of Rail Network Infrastructure.** This strategy includes developing a Rail Infrastructure Asset Management System and prioritising infrastructure action plans in alignment with the European Investment Plan (EIP). Partners will also prepare tender dossiers to enhance safety at level crossings. Infrastructure improvements are expected to raise compliance with TEN-T standards by at least 20%.
- **Cooperation within the region**. The action plan will strengthen coordination by forming networks of Rail Regulatory Authorities, National Safety Authorities (NSAs), and National Investigation Bodies (NIBs). Enhanced regional cooperation and knowledge-sharing with EU counterparts will improve oversight, governance, and regulatory alignment.
- **Sustainable and Multimodal Measures.** Digitalisation efforts, including the development of electronic freight transport information systems and the promotion of multimodality through action plans for multimodal freight terminals, will be key. Building capacity for climate resilience and risk assessments will also strengthen sustainability, creating a robust rail infrastructure capable of withstanding environmental challenges.

The Next Generation Rail Action Plan imagines a unified, competitive rail market in the Western Balkans, fully integrated into the EU rail network. This includes establishing efficient, safe, and sustainable transport systems that enhance cross-border connectivity and regional cooperation. By 2029, the Western Balkans anticipates a modernised, resilient rail infrastructure aligned with EU standards, positioning the region as a vital link in the European transport network.

5.3. **Road transport**

The Road Action Plan guides Western Balkan authorities in developing a climate-resilient, intelligent, and resource-efficient TEN-T road network, incorporating green and smart elements into investments. Endorsed by the Regional Ministerial Council in October 2020, it aims to complete its objectives by 2023, with a current average implementation rate of 61%.

Significant progress has been made in deploying Intelligent Transport Systems (ITS) with all regional partners, except Bosnia and Herzegovina, which have adopted or are in the final stages of adopting ITS strategies. With recent EU legislation changes, the focus will shift from 2025 towards implementing the ITS Directive and Delegated Regulations. Notable achievements include electronic tolling interoperability between North Macedonia and Serbia, and Montenegro's interoperability with Serbia, with plans to extend further with North Macedonia, interoperability between the road operators in Bosnia and Herzegovina.

Progress in road maintenance has been moderate. Albania and North Macedonia have established Road Asset Management Systems (RAMS), while Serbia has piloted a Service Level Agreement (SLA). However, challenges persist in developing RAMS across the region. Climate resilience and alternative fuel adoption have seen slower progress, with Albania and Serbia making advancements, supported by CONNECTA and the Transport Community Secretariat.

Regional collaboration has been strengthened by the 2022 Memorandum of Understanding, bringing together road executives to share best practices in ITS deployment, e-tolling, alternative fuels, and road maintenance. This network has fostered discussions on challenges and priorities, particularly on road maintenance and climate resilience related topics.

The next five years will be crucial in shaping the future of road transport in Western Balkans. This period represents a critical phase to foster greater connectivity, enhance economic resilience, and align with EU standards across all transport sectors.

The Next Generation Road Action Plan, 2025-2027, supports the transposition of Annex I.3 of the Transport Community Treaty, covering rules applicable to road transport, incorporating the latest changes in EU legislation and aligning its measure with the New Growth Plan Reform Agenda. It introduces forward-looking measures to

enhance the efficiency and responsiveness of road transport for both goods and passengers. Though it retains the four main pillars of the previous plan, the updated version provides more precisely defined actions, reflecting progress achieved, the specific needs of regional partners, and recent updates to relevant EU regulations.

On November 8th, 2023, the European Commission introduced a new Growth Plan for the Western Balkans, covering 2024-2027. The plan includes the provision of €6 billion in grants and loans to help accelerate economic convergence with the EU. As a part of this plan, seven priority areas for integration into the EU's single market have been identified, and one of these is Action 4 - Facilitation of Road Transport. This action emphasises the need to support the Western Balkans in integrating their road transportation systems, adopting relevant EU regulations, and gaining access to EU information systems such as IMI and ERRU. This action aims to make it easier for Western Balkans to conduct bilateral transport operations. The Transport Community Secretariat assists the regional partners in establishing the Western Balkans Register of Road Undertakings, mirroring the ERRU to the greatest extent possible.

Road transport policy should complement the development of the TEN-T network in the Western Balkans and closely follow EU policies. Green and digital transition will focus on ITS as an important demand management tool for road traffic and will support the deployment of e-charging stations in a coordinated regional approach aligned with the Alternative Fuel Directive. Sustainability in terms of maintenance and climate resilience should be an important part of the Regional Partners' strategies to preserve the infrastructure and ensure a better future. Expected results in the next period can be summarised as follows:

- Road maintenance. In the next five years, all Regional Partners should establish functioning Road Asset Management Systems as a crucial stone in setting up efficient maintenance systems. Service Level Agreements (SLAs) should become common practice, as they represent the greatest challenges to establishing efficient maintenance systems. The Regional Partners will need additional support to prepare SLAs, potentially by IFIs as part of their loan agreement. Furthermore, capacity-building activities will continue to be provided by the Transport Community Secretariat through dedicated workshops within the remit of the Road Technical Committee.
- Transposition of EU legislation. The transposition of the ITS EU Directive and Delegated Regulations as per Annex I.3 – Rules applicable to road transport, into national legislation, and the establishment of centralised platforms and organisational structures like the National Access Point (NAP) and National Bodies. These measures aim to promote harmonisation, interoperability, and standardisation across the region, improve real-time traffic information services (RTTI) and multimodal travel information systems and facilitate the consistent implementation of interoperable electronic tolling systems across the Western Balkans region.
- Climate resilience. Adopting the European Commission Technical Guidance on climate-proofing infrastructure, implementing a Resilience Action Plan for Core and Comprehensive Road Networks, undertaking risk-based vulnerability interventions for the TEN-T Networks, and enhancing the use of alternative fuels by deploying e-charging stations. These initiatives involve integrating climate risk assessments and adaptation measures into infrastructure projects, strengthening road networks against natural disasters, prioritising interventions based on risk assessments, and promoting electric vehicle uptake through the strategic deployment of charging infrastructure.
- Digital and Regional Integration: Establishing a Western Balkans Register of Road Undertakings and creating systems for e-permits will streamline operations and prepare the region for deeper integration with the EU's digital and operational frameworks in line with the New Growth Plan.
- A regional dialogue on road transport market liberalisation in the Western Balkans, led by the Transport Community Secretariat in close cooperation with CEFTA, is expected to commence in 2025.
- Growth Plan and the Reform Agendas by most regional partners, excluding Bosnia and Herzegovina, the focus from 2025 to 2027 will shift to transposing regulations in the Intelligent Transport Systems (ITS) domain. This includes Directive (EU) 2661/2023, amending Directive (EU) 40/2010, as well as Delegated Regulations (EU) 670/2022, 962/2015, and 490/2024. In addition, the upcoming Road Action Plan will require the transposition of Regulation (EU) No. 1679/2024, which repeals Regulation (EU) No. 1315/2013, by 2025.

5.4. **Road Safety**

Progress on the Road Safety Action Plan has been moderate due to delays in adopting the strategies and establishing the agencies. However, significant efforts have been made to improve high-risk road sections, data collection, and enforcement against speeding, alcohol use, and seat belt compliance. Notable achievements include Serbia joining the CARE Expert Group and database, developing the Western Balkans Road Safety Observatory Information System, and collecting KPIs on seat belt use based on EU Methodology. These milestones were supported by the EU and the Transport Community Permanent Secretariat.

Road safety remains a regional priority, with collaboration among stakeholders being crucial. Unfortunately, in 2023, the Western Balkans recorded 1,261 fatalities. WB Region's rate of 73 fatalities per 1 million inhabitants is still high in comparison with the EU rate of 46 fatalities per 1 million inhabitants. While making progress, the Western Balkans still face challenges in reducing road fatalities compared to the EU27.

The Western Balkans Road Safety Observatory, with its key component, the Information System dashboard, consolidates annual road safety indicators for the Western Balkans online for the first time, providing dynamic, accessible data. It helps set and monitor regional road safety targets, improving data harmonization. Regional partners are actively ensuring the Observatory's sustainability and data quality.

Over the next five years, the Road Safety Policy will continue to be aligned with the Stockholm Declaration, the Global Plan for the Decade of Action, and the EU Road Safety Policy Framework for 2021-2030. The Next Generation Road Safety Action Plan supports the Safe System Approach, the EU Road Safety Policy Framework 2021-2030, and the transposition of the acquis related to road safety contained in TCT Annex I.3. It emphasises the importance of a holistic approach to road safety via continued improvements in the design of roads and vehicles, enhancement of laws and law enforcement, and provision of timely, life-saving emergency care for the injured, aiming to integrate safety measures for all road users. These are the list of the expected results in the coming period:

- All Regional Partners to adopt the New Road Safety Strategies and adequate Action plans for setting road safety targets for the second Decade of Action 2021-2030 (50% reduction of fatalities and serious injuries by 2030) - some Regional Partners have adopted, some are missing Action plans for implementation of the Road safety strategies.
- To further strengthen the institutional framework. Enhanced data collection systems (collection of Key Performance Indicators using the new EU Methodology released in May 2021), including a more robust governance structure capable of effectively coordinating and implementing safety measures. This shall lead to better oversight and evaluation of initiatives, ensuring timely adjustments and improvements where needed.
- Aligning legislation with EU Directive 2008/96/EC and as amended by Directive (EU) 2019/1936on Road Infrastructure Safety Management - since it is still an ongoing process for most Regional Partners. Furthermore, some Regional Partners' relevant authorities need to continue identifying high-risk road sections (dangerous roads and road sections) and adopt and start implementing the three-year Road Safety Inspections and Road Safety Audits Plans. The alignment with the Road Infrastructure Safety Management and Tunnel Safety EU Directives shall minimise road accident risks and enhance overall transportation safety. Shall contribute to the creation of safe infrastructure that meets the regulatory requirements. These outcomes promise to establish a secure and reliable transportation network that prioritises the well-being and safety of all users
- A specific programme for the safety of vulnerable road users and, in particular, for motorised two-wheel vehicles to be developed. These shall further strengthen the responsible driving and adherence to safety regulations through enhanced awareness campaigns, education programs, and enforcement of traffic laws. Shall improve the safer road designs, installation of appropriate signage and barriers, and speed management measures.

- The increased number of vehicles equipped with advanced safety features such as airbags and anti-lock braking systems (ABS), will result in a significant decrease in road accidents. It shall ensure compatibility and interoperability with the emergency systems.
- Expected increased capacities and knowledge gained from the regional partners with improved policy-making processes will have an impact on lowering the number of road accidents with serious injuries and fatalities. In that respect, the Transport Community Permanent Secretariat plans to offer support/workshops via TAIEX with topics focused on road safety legislation.

5.5. **Transport Facilitation**

Transport facilitation policy will remain centred around the establishment of an advanced model of integrated border crossing points that functionally integrates operations of border agencies in order to complete all exit and entry formalities in a one-stop process at the border, called joint border crossing points (JBCP), in both road and railway transport.

To effectively put the JBCP concept into practice, the Regional Partners need to implement an array of complex trade facilitation measures, including:

1. arranging for a preferred mode of operation of joint controls,
2. harmonising working hours for border agencies,
3. redesigning/simplification of border procedures,
4. equipment-sharing arrangements, and
5. necessary infrastructure investments.

In addition, successful JBCP implementation and operation require a comprehensive ***legal framework***, a sound ***institutional structure*** enabling regular cooperation and coordination at all levels, efficient ***capacity building,*** and an effective system ***for monitoring and evaluating*** progress.

Most of these elements are identified as separate actions in the new Action Plan for Transport Facilitation 2025-2027, but their implementation is interconnected as they are elements of the same process. Fulfilment of the overarching aim and the benefits of introducing the new border management concept will fall short if only one or a few are put into practice from the entire set.

Further progress in the Action Plan implementation will certainly depend on continuous and concentrated administrative efforts, constant improvement of technical knowledge and expertise, financial support, but above all, unequivocal political commitment, and an environment conducive to mutual confidence and good neighbourly relations.

The TCT Secretariat supports the authorities in providing guidance agreement templates and offering technical assistance in setting the legal background for the intra-Western Balkans JBCPs.

Concerning external BCPs between EU and Western Balkans, within the frame of the Green Lanes initiative, the TCT Secretariat prepared BCP fiches for 10 busiest BCPs on the TEN-T Network which identify the investment needs in infrastructure improvements, new equipment and strengthening the capacities of the border agencies. Based on the identified needs, it is expected the authorities develop concrete project proposals, to be further financed by the Safe and Sustainable Transport Programme.

Another helpful tool might be the organisation of joint working meetings and training events for the road and railway border authorities between the EU and Western Balkans to get a better understanding of the benefits and requirements for operating joint railway/road border controls and serve as confidence-building exercises. TCT

Secretariat organised a set of joint workshops for the border authorities of the intra-Western Balkan BCPs/CCPs in 2022 and on the EU-Western Balkan BCPs in 2023, and they proved very successful. TCT Secretariat plans to continue with targeted training for the border agencies' staff throughout 2025-2027.

The efficiency of the JBCP operation depends to a large extent on the appropriate infrastructure setting at the BCPs, the availability of modern equipment and unimpeded functioning of all ICT applications, including new digital instruments. The corresponding actions in the Action Plan are supported by the EC through the CONNECTA mechanism (for project preparation), as well as the Safe and Sustainable Transport Programme and World Bank's Trade and Transport Facilitation Project (for works and supplies).

5.6. **Waterborne transport**

The development of waterborne transport in the Western Balkans is a critical priority within the region's transport policy framework, covering both inland waterways and maritime sectors. The Action Plan for Waterborne Transport and Multimodality, sets an ambitious policy direction designed to align regional standards with the EU acquis, strengthen institutional capacities, and drive infrastructure modernisation across both transport modes. This initiative underlines our commitment to fostering a more integrated, sustainable, and resilient waterborne transport system within the Western Balkans.

For Inland Waterway Transport, the policy highlights the Danube, Sava, and Tisa Rivers as important rivers for Serbia and Bosnia and Herzegovina within the Rhine Danube corridor.

Regarding the transposition of the EU Acquis, Serbia is performing at a satisfactory level, having transposed a major part of EU directives in contrast to Bosnia and Herzegovina's lags due to the absence of a national waterborne transport law, hindering further regulatory development.

On infrastructure, navigability, digital, and green elements of Inland Waterways, Serbia has advanced in digital infrastructure, while in Bosnia and Herzegovina, phase I of the project for the rehabilitation of Port of Brčko is almost complete.

In **Maritime Transport**, policy efforts focus on enhancing compliance with international safety and environmental standards and promoting digitalisation and sustainability in port operations.

Regarding the transposition of the EU Acquis, Serbia has advanced significantly in transposing a satisfactory part of the EU legislation part of Annex I of the Treaty, while Montenegro and Albania are in the continuous process of updating their frameworks. The progress of Bosnia and Herzegovina, Kosovo, and North Macedonia is slower.

The Next Generation Action Plan outlines the priorities for the transposition of the EU Acquis outlined in Annex I.4 and I.5 of the Treaty, upgrade of port infrastructure, encourage to increase efforts for protection of the environment including decarbonisation, improvement of digitalisation, enhancement of safety and security, improvement of the human elements, and increase multimodal transport for Regional Partners, in full implementation of the Transport Community Treaty and its Annex I.

For the next five years, the Region faces several key challenges and objectives in the development of waterborne transport. The main expectations for the coming five years are as follows:

- Legislative Harmonisation: For the next five years, the regional partners will increase their efforts toward transposing their legislation with the EU Acquis as per the Annex I of the Transport Community Treaty.
- Digital and Green Port Infrastructure: Regional partners will prioritise digital and green infrastructure upgrades to enhance port efficiency and reduce emissions. Implementing and upgrading comprehensive digital systems

like Port Community Systems (PCS), National Maritime Single Window (NMSW), and Vessel Traffic Monitoring Systems (VTS). Moreover, investments in low-emission infrastructure, including renewable energy, shore power, and alternative fuel options like LNG, will support the EU's decarbonisation goals.

- Professional Certification Recognition: Albania, Serbia and Bosnia and Herzegovina will finalise the alignment of the crew qualification standards with the European Union's for mutual recognition, enhancing workforce mobility and economic integration.
- Institutional Capacity Building: The focus for the next five years will be directed to strengthening the skills and institutional capacity in waterborne administration, leveraging training programs and technical assistance from international institutions like the EU Commission, IMO, EMSA, and CEMA.
- Regional Cooperation: Enhance collaboration on cross-border projects, focusing on transnational development, environmental protection, and strengthening connectivity.
- Environmental Compliance: partners should adopt sustainable practices in alternative fuelling facilities and environmental performance of the vessels, supporting the EU's commitment to reducing GHG emissions toward the path to zero-emission in waterborne transport.

5.7. **Transport of dangerous goods**

Transport of dangerous goods is an ongoing economic activity. Transposition and implementation of this file will continue during the next five years, with a special focus on adaptation to the technical and scientific progress of Directive 2008/68/EC on the inland transport of dangerous goods. Every second year, amendments are brought to the Annexes to the international agreements, i.e.:

- the Agreement concerning the International Carriage of Dangerous Goods by Road (ADR);
- Regulations concerning the International Carriage of Dangerous Goods by Railway (RID) - Appendix C to the Convention concerning International Carriage by Railway (COTIF); and
- the European Agreement concerning the International Carriage of Dangerous Goods by Inland Waterways (ADN) requires that the updated annexes be translated into all languages of the region.

The application of these technical requirements to domestic transport needs timely translation into the domestic language(s) of the regional partners and the appropriate capacity of the administrations to deal with the implementation process for this legislation.

Over the next five years, the Transport Community Treaty (TCT) will focus on the continued implementation of legislation related to the transport of dangerous goods, with a particular emphasis on capacity building and regional cooperation. Key priorities include professional training for safety-related functions such as dangerous goods safety advisers, ADR drivers, and ADN experts, and addressing cross-disciplinary aspects to align with developments in road, rail, and inland waterways safety.
TCT will support the regional partners in the development of relevant projects, particularly where capacity building can be synchronised, and assist in the further elaboration of regional cooperation in specific areas. The Transport of Dangerous Goods Technical Committee will remain the main platform for capacity building, with continued support through dedicated conferences, studies, and awareness-raising activities.

By 2025, the Regional Partners are expected to transpose Directive 2010/35/EC on transportable pressure equipment, and work will continue to address gaps in compliance with key performance indicators. Additionally, TCT will assist the regions in the transposition of waste legislation and provide support for safe disposal practices for dangerous wastes.

A particular focus will be placed on improving emergency intervention processes for accidents involving dangerous goods, with a priority on enhancing operating procedures for high-consequence chemicals and improving the quality of emergency vehicles. Translations of ADR will be distributed to emergency services, and training will be ensured for firefighting and public safety teams. Regional cooperation in enforcement will be strengthened, particularly in organising joint checks with neighbouring EU Member States.

Furthermore, TCT will assist the region in implementing Directive (EU) 2022/1999 on uniform procedures for checks on the transport of dangerous goods by road, which will be closely linked with broader roadside enforcement. By 2027, projects aimed at greening the transport of dangerous goods will be realised, including efforts to reduce pollution from ageing fleets.

TCT will continue to support the implementation of eCall systems, aligning with EU legislation, and assist regional partners in adapting to the latest EU Acquis. Finally, TCT will ensure effective coordination with EU institutions and enhance cooperation with industry to reduce pollution and improve safety in the transport of dangerous goods.

5.8. **Social acquis and passenger rights**

The Regional Partners are making efforts to align with **EU standards in social issues and passenger rights** within the transport sector. Through the Transport Community's Action Plan for the Implementation of the EU acquis in Social Issues and Passenger Rights, the region is enhancing protections for workers and passengers alike. This Action Plan is critical to advancing fair, safe, and accessible transport services while ensuring the well-being of the workforce. The overall implementation rate currently stands at 54%, with key achievements in labour standards, gender equality, and passenger accessibility across all transport modes.

Key achievements include legislative alignment in areas such as working time and rest periods for transport workers in countries like Serbia and Montenegro, alongside early steps to address the gender gap in the workforce. Progress on passenger rights has been slower, with some advances in transparency and accessibility. Yet gaps remain in providing real-time travel information, accessible facilities, and support for persons with reduced mobility. As Regional Partners continue to address these gaps, ongoing efforts are expected to enhance further both social protections for workers and rights for passengers.

For the upcoming five years, the priority for Regional Partners will be the **full transposition and implementation of EU legislation as outlined in Annex I.3**, **with a specific focus on harmonising regulations concerning working hours, rest periods, and enforcement of driver safety measures**. Efforts will target the consolidation of a legal and institutional framework that reflects EU standards, ensuring fair working conditions across transport modes. Regional Partners will need to address any remaining gaps by establishing monitoring mechanisms and enforcing tachograph and rest period regulations to improve road safety and protect worker health.

Passenger Rights and Accessibility Enhancements. Strengthening passenger rights will remain central to policy efforts, particularly for rail, bus, and coach transport. Regional Partners will focus on implementing key Regulations, by aiming to ensure transparency, equitable treatment, and efficient complaint handling. Accessibility will be a core focus, with targeted investments in terminals and transport infrastructure to support passengers with disabilities or reduced mobility. Capacity-building programs will continue to equip local authorities with the skills needed to manage and enforce these standards effectively. To support these goals, the comprehensive study on passenger rights, expected in December 2024, will provide a roadmap with recommendations tailored to each Regional Partner. This will guide policy decisions and prioritise actions to strengthen the regulatory framework and passenger services.

Gender Equality and Workers Inclusion. Promoting gender equality and inclusivity in the transport sector is another key objective. Over the next five years, policies will emphasise fair recruitment, equal opportunity, and enhanced working conditions that attract and retain a diverse workforce. Targeted campaigns and training sessions will focus on closing the gender gap and supporting underrepresented groups, ensuring a more inclusive and supportive environment in the transport sector.

By implementing these strategic priorities, Regional Partners aim to create a transport system that is safe, inclusive, and aligned with EU standards, ultimately facilitating the Western Balkans' integration into the broader European transport network.

6. Overall Conclusions and Recommendations

1. **Compliance and funding challenges to reach TEN-T standards.** Compliance with the **TEN-T standards** within the **timeframe imposed by Regulation 1315/2013, repealed by 1679/2024,** remains a **challenging goal** requiring systematic and coordinated effort on the part of all Regional Partners, backed by substantial financial resources. Significant funding has already been mobilised for major projects likely to significantly improve the TEN-T Network by 2027. According to the Transport Community Annual Report on the development of the TEN-T Core and Comprehensive Network, almost **€15,2 billion has been committed to ongoing and financing secured projects targeting the Core and Comprehensive Network**. The greater share of investments is in roads (€11,5 billion), followed by railways (€ 3,87 billion), waterborne (€ 0,7 billion) and airports (€ 0,14 billion). **Inland waterways** transport shows satisfactory compliance, but it is concerning that none of the core inland ports have plans to ensure the availability of clean fuels or environmental sustainability by 2030. The Action Plan for Waterborne Transport and Multimodality includes measures for the greening of ports, focusing on exploring future alternative fuel options. **Maritime transport** also shows satisfactory compliance, though core ports lack plans for clean fuel availability. The Port of Bar has initiated several small-scale sustainability projects, while the Port of Durres, in its relocation to Porto Romano, must ensure it maintains TEN-T compliance and incorporates greening measures in the new design. **Airports** in the Western Balkans largely comply with TEN-T standards, though some, like Sarajevo, are nearing capacity. No airports are yet connected by rail, but Tirana Airport is set to be the first with an ongoing rail connection project. Several airports, including Sarajevo, Belgrade, Niš, and Kraljevo, offer alternative clean fuels for ground services. While supply depends on market demand, airports should prepare for increased availability as the demand for clean fuels grows**.**

2. **Priority projects and investment needs.** Planned projects included in the Regional Partners' Single Project Pipeline aim to contribute further to reaching compliance with the TEN-T Standards. The total number of transport projects is 80, of which 37 are for roads, 27 for railways, 8 for ports, 6 for waterborne transport and 2 for airports. The total amount of investment needed is **EUR 25.8 billion**, **EUR 7.475 billion** for mature projects and **EUR 17.994 billion** for projects under preparation. Regulation 1679/2024 requires completion of the Core Network by 2030, Extended Core Network by 2040 and Comprehensive Network by 2050. This deadline is reflected in the planning instruments of the Regional Partners aiming at improving the indicative extension of the TEN-T Core Networks to the Western Balkans.

   Apart from investing in large infrastructure projects intended to close the development gap and ensure compliance with TEN-T criteria, **smaller-scale interventions** targeting specific network and policy shortages, promoting smart and sustainable mobility and likely to bring quick gains should be prioritised.

3. **Improvements in the network compliance.** Implementation of ongoing, mature and projects under preparation will increase TEN-T compliance in the region as described below.

   Following the implementation of the eighteen ongoing rail projects indicated in the TEN-T Annual Report and the twenty planned projects described in this report, compliance with TEN-T standards will be increased in terms of electrification from 65% to 96.3%, ERTMS from 2.21% to 75% and axle load from 87.4% to 100%.

   Hazard reduction measures should be taken under an institutional framework the region has yet to adopt. Regarding TEN-T standards, axle weight, track gauge and electrification are respected in most mature projects. However, there are several current planned projects that do not foresee the implementation of ERTMS and train length TEN-T standards.

According to projections in the TEN-T Annual Report, the Core Network road compliance rate is expected to rise from 54% to 66% by 2027, following the completion of ongoing projects (meeting infrastructure profile and condition criteria). However, as the gap analysis showed, full compliance is not anticipated before 2040, underscoring the challenges and complexity faced by Regional Partners in meeting TEN-T Regulation deadlines. The Comprehensive Network's compliance rate is also set to improve, reaching 80% by 2027 and 93% by 2040.

4. **Maintenance should become a top priority.** Achieving sustained improvement in network quality heavily relies on consistent and adequate maintenance efforts, including for newly developed assets. This remains a significant challenge, particularly in the railway sector, which continues to experience underinvestment, with only 15% of funds allocated and focusing isolated segments rather than network-wide enhancements. The poor condition of much of the railway network highlights the need for regular condition-based maintenance (CBM) supported by multi-annual contracts between Infrastructure Managers and relevant authorities, paired with timely and sufficient funding—an approach central to the Railway Action Plan. Adherence to EU Technical Specifications for Interoperability and TEN-T standards further supports this objective.

   Similarly, for roads, investment in maintenance must move towards a more systematic, performance-oriented approach, ensuring asset preservation and optimal road conditions. Maintenance policies, prioritised within the Road Action Plan, and which need to be supported by secure funding, will be crucial for achieving long-term TEN-T compliance across the region.

5. **Long term growth and strategic planning.** Achieving the desired outcomes from infrastructure investments requires attention to several key factors. While large infrastructure projects deliver immediate benefits through consumption and employment during the construction phase, their capacity to foster sustained economic growth depends on meticulous planning, design, and selection aligned with current and anticipated market demand.
   However, increased government expenditure on such projects elevates public debt levels, making the long-term impact of these investments essential for ensuring sustainable economic growth.. Short-term economic boosts cannot fully offset the financial strain if projected benefits do not materialise. In such cases, unproductive projects may hinder the region's fragile economies rather than support long-term growth.
   To mitigate these risks, enforcing rigorous project planning, selection, and prioritisation mechanisms is essential to secure high-quality investments and protect long-term benefits. These principles should also guide the development of the TEN-T in the Western Balkans, encouraging Regional Partners to adopt a region-wide perspective on transport investments to maximise network-wide benefits.
   The recent adoption of the updated TEN-T guidelines (Regulation (EU) 2024/1679), the new Growth Plan for the Western Balkans, Reform Agendas, and the endorsement of Next Generation Action Plans represent significant milestones. These frameworks provide a foundation for structured and sustainable growth, setting the region on course for a resilient transport network.

6. **There is an overall necessity to improve planning and prioritisation at a regional level**. There has been significant progress in recent years in prioritisation and ranking at a national level, through Regional Partner Strategies and SPPs. However, this has not been systematically mirrored at the regional level when prioritising projects of importance for regional and EU connectivity, and cooperation between Regional Partners has sometimes been suboptimal. Adequate cooperation structures and mechanisms have been set under the WBIF framework and strategic orientation and priorities for TEN-T development are clear. A rolling plan with a prioritised project list is a further step towards tighter cooperation and improved regional planning. Furthermore, the Corridors introduced by the new TEN-T regulation will ensure enhanced coordination at the regional level, both within the Western Balkans and with the neighbouring EU Member States.

7. **The above calls for a more focused approach at the regional level to ensure optimal use of the available resources and maximise benefits (buying more for less**). Besides focusing on the highest-ranked priorities, this would include proper infrastructure dimensioning based on forecasted demand and project economic performance, maximising the use of grant funding and payment structuring over time (with due consideration given to

increased funding needed for maintaining newly-built assets). There should also be more focus on well-targeted small-scale interventions, likely to bring rapid gains and tangible benefits in TEN-T compliance at a fraction of the costs typically required by large infrastructure projects.

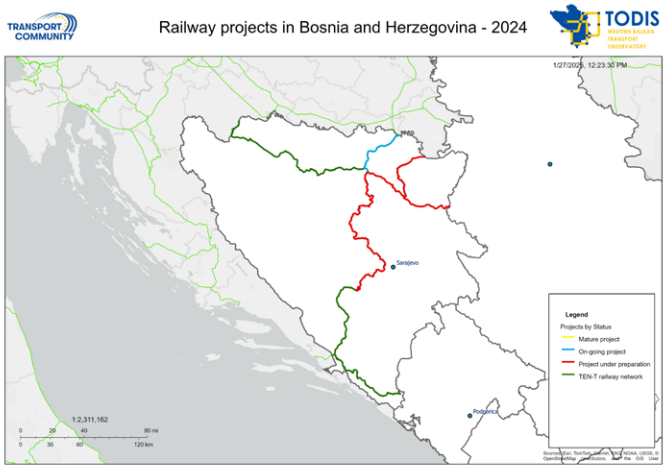
8. **Project implementing capacity should also increase**. Persistent problems are still hindering transport development in the Western Balkans. Issues such as lack of human capacity and other resources, lengthy development of project documentation (approx. half the time it takes to carry out the works), an equally long grant approval process by all stakeholders, etc., are contributing to the region's poor project implementation record. Finally, more cooperation is needed at the regional level, especially on cross-border and corridor projects at all stages: project documentation development, project execution, operation and maintenance. The region will further benefit from substantial technical assistance resources for project preparation, implementation and institutional support. Through dedicated project preparation facilities such as IPF and CONNECTA will remain active, with JASPERS offering advisory support for capacity building and closing project maturity gaps. The Transport Community will be providing targeted assistance in the areas covered by the Treaty, while European Commission instruments such as TAIEX may be used for institutional support. Making the best use of such resources is one of the keys to success!

9. **Transition to sustainable and smart mobility**. Green and digital components need further integration into project planning across the region. In collaboration with International Financial Institutions (IFIs), Regional Partners should ensure these elements are embedded in mature and upcoming projects.
   Future transport planning should focus on resilience, sustainability, safety, connectivity, and innovation, shifting from a quantity-driven approach to a quality-centred one. The Sustainable and Smart Mobility Strategy for the Western Balkans, aligned with the EU's own strategy, aims to put the region on track for green mobility, with projections to significantly reduce transport emissions by 2050, supporting the EU's climate neutrality goals. This strategy aligns with the Western Balkans Green Agenda and the Economic and Investment Plan for the region.
   Regulation (EU) 2024/1679 sets ambitious targets for the TEN-T network: Core Network standards by 2030, Extended Core by 2040, and Comprehensive by 2050. Meeting these timelines will require addressing specific regional challenges, including historical infrastructure gaps and limited funding. This updated regulation envisions a greener, more resilient European transport network underpinned by sustainability, cohesion, efficiency, and enhanced user benefits—reducing congestion and emissions, promoting multimodal transport, and improving climate resilience.

10. **Aligning with EU Legislation and Sectorial Reforms.** Progress on EU legislative alignment and sector reforms is essential to maximise the impact of ongoing and planned investments. Currently, 63% of Annex I legal acts from the Transport Community Treaty still need transposition at the regional level, with 17,7% fully transposed and 19,2 % partially transposed. The 2020-2024 Action Plans for Rail, Road, Road Safety, Waterborne and Multimodality, and Transport Facilitation show a moderate progress rate of around 54.8%. The Action Plan on Social Issues and Passenger Rights, introduced in 2023, has an implementation rate of 54%.

    The Next Generation Action Plans, set for completion by 2027, build upon previous action plans by addressing unfinished actions, drawing on lessons learned, and setting clearer objectives. Aligned with updated EU legislation and recent strategic documents, these plans support sector-specific reforms across road, rail, road safety, transport facilitation, and waterborne transport. Successful implementation will bring the region's infrastructure closer to EU standards, fostering a more sustainable and integrated European transport network.

ANNEX 1 **Railway Project Fiches**



Regional Partner:

Bosnia and Herzegovina

Double track sections:

55% or 95 km

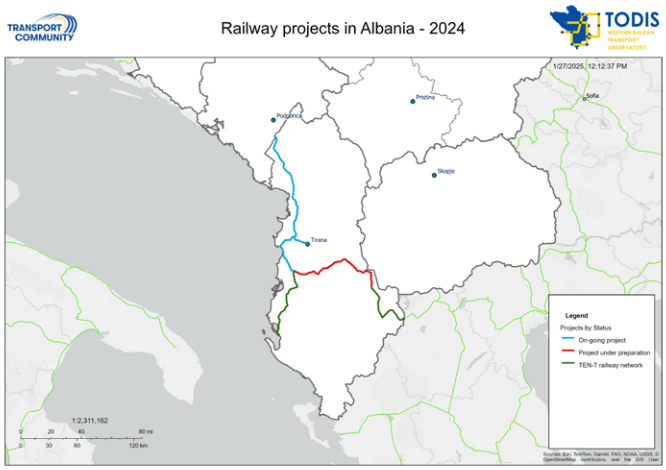
Includes green and digital elements:

Electrification

Figure 25. Overview of priority projects in Bosnia and Herzegovina

Priority Project Name	**Upgrade and reconstruction of the Doboj-Rasputnica Miljacka**		
Regional Partner **Bosnia and Herzegovina**	Length (km) 190	Estimated cost (M€) 1500	Type of works New infrastructure
Core Network segment **Yes**	Strategic Projects National strategies, Single Project Pipeline		Technical status Feasibility Study (including Cost-Benefit Analysis)
Project Description	This project is under preparation with a length of 190 km and covers two main sections. The first includes the 95 km Srpska Kostajnica – Doboj – Maglaj – Jelina double track and 95 km of Jelina – Zenica – Podlugovi – Rasputnica Miljacka single track section. Envisages upgrade and reconstruction of the Doboj-Rasputnica Miljacka railway line, including the Zenica and Podlugovi freight and passenger stations, as well as the construction of doubled track along the existing one for sub-section Jelina – Zenica – Podlugovi – Rasputnica Miljacka.		
Expected Benefits	The project will result in savings in vehicle operating costs, transport time and maintenance costs, as well as enhance the capacity and reliability of the railway sections and traffic safety. It is expected to contribute to a modal shift from road to railway, yielding environmental and road safety benefits. The project also contributes to climate change mitigation.		

Priority Project Name	**Track overhaul of the railway sections Doboj-Maglaj, Jelina-Zenica and Podlugovi - Sarajevo**		
Regional Partner **Bosnia and Herzegovina**	Length (km) 57	Estimated cost (M€) 47	Type of works Rehabilitation
Core Network segment **Yes**	Strategic Projects National strategies, Single Project Pipeline		Technical status Detail design
Project Description	These three mature projects covered 57 km of the main railway line in BIH. The main goal is full rehabilitation of the sections with a return to the design parameters.		
Expected Benefits	The project will result in savings in vehicle operating costs, transport time and maintenance costs, as well as enhance the capacity and reliability of the railway sections and traffic safety. It is expected to contribute to a modal shift from road to railway, yielding environmental and road safety benefits. The project also contributes to climate change mitigation.		



Regional Partner:

Albania

Double track sections

0 % or 0 km

Includes green and digital elements:

Electrification
ERTMS
ETCS Level 1

Figure 26. Overview of priority projects in Albania

Priority Project Name	**Reconstruction of Durres to Rogozhine railway line**		
Regional Partner **Albania**	Length (km) 35	Estimated cost (M€) 120	Type of works Upgrade/Reconstruction
Core Network segment **Yes, Extended Core**	Strategic Projects National strategies, Single Project Pipeline, EC Economic and Investment Plan (indirectly Flagship 3 as a continuation of Podgorica-Tirana-Durres line)		Technical status Detailed Design, WBIF investment grant
Project Description	The overall objective of the project is to contribute to the upgrade of the TEN-T railway network in Albania, which will result in improved transport connectivity and increased railway traffic (and decrease of road traffic), thus contributing to railway modal shift, reduction of environmental impact, strengthening of green economy, reduction of rail and road accident rates.		
Expected Benefits	The project will establish for the first time a direct railway connection between Rrogozhina, Lekaj, Kavaja, and Golem to Tirana via connection to the new Durres-Tirana line, which is contracted for construction. Conversely, the inhabitants of Tirana would, for the first time, be able to access the very pretty and developed coastal area of Albania between Durres, Golem and Kavaja by train without changing the mode of transport. This is expected significantly to change current transport patterns between the most populous city of Albania and its most important tourist destination. EIRR: 9.2%		

Priority Project Name	**Rehabilitation of the railway Rogozhine-Pogradec-Lin and construction of a new railway link to the North Macedonian border**		
Regional Partner **Albania**	Length (km) 130	Estimated cost (M€) 220	Type of works Upgrade/Reconstruction
Core Network segment **Yes, Extended Core**	Strategic Projects National strategies, Single Project Pipeline, EC Economic and Investment Plan		Technical status Feasibility study, WBIF grant TA
Project Description	The overall objective of the project is to contribute to the upgrade of the TEN-T railway network in Albania, which will result in improved transport connectivity, and increased railway traffic (and decrease of road traffic), thus contributing to railway modal shift, reduction of environmental impact, strengthening of green economy, reduction of rail and road accident rates.		
Expected Benefits	For the first time, the project will establish a direct railway connection between Rogozhine and Lin i.e. the Macedonian border. Conversely, the inhabitants of Tirana would, for the first time, be able to access the very pretty and developed coastal area of Albania between Durres and the eastern part of Albania. This is expected significantly to change current transport patterns between the most populous city of Albania and its most important tourist destination.		

Regional Partner:

Kosovo

Double track sections

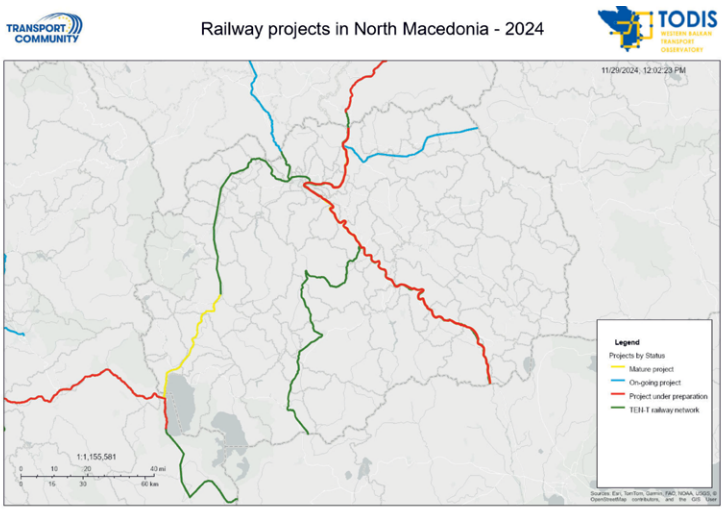
0 % or 0 km

Includes green and digital elements:

Electrification

Figure 27. Overview of priority projects in Kosovo

Priority Project Name	**Rehabilitation of railway section Pristina - Merdare**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Kosovo	45	67.3	Rehabilitation
Core Network segment	Strategic Projects		Technical status
Comprehensive	National strategies, Single Project Pipeline,		Feasibility study
Project Description	The feasibility study is done through the WBIF fund. The main goal of this project is to achieve design parameters and create conditions to establish passenger and freight traffic after a long time.		
Expected Benefits	The reconstruction of the Pristina - Merdare railway line aims to re-establish traffic in this section with respect to all rail safety requirements. Other objectives are improved equality of services in railway traffic and tourism development. The project would mean an appropriate development of economic activities and efficient functioning of the Pristina airport. The overall achievement would be better infrastructure connections for transit traffic.		



Regional Partner:

North Macedonia

Double track sections

0 % or 0 km

Includes green and digital elements:

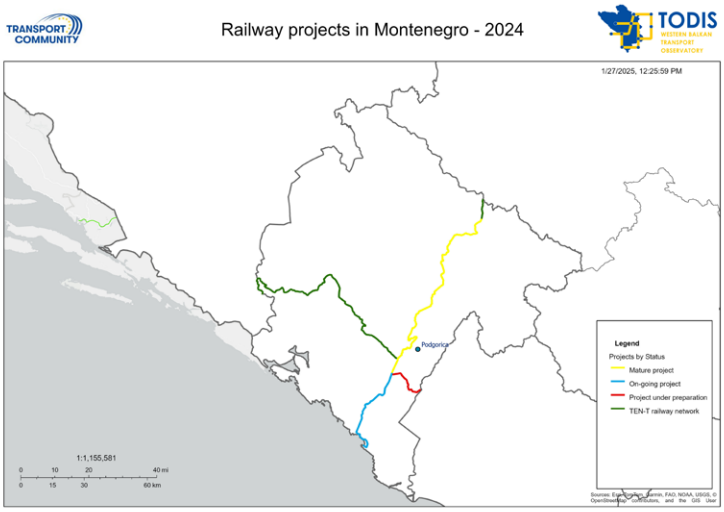
Electrification
ERTMS
ETCS Level 1

Figure 28. Overview of priority projects in North Macedonia

Priority Project Name	**Construction works on the Struga – Border with Albania, railway section along Corridor VIII**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	10	100	New Construction
Core Network segment	Strategic Projects		Technical status
Yes, Extended Core	National strategies, Single Project Pipeline		Detailed Design
Project Description	The objective of this project is to build a railway line from Kicevo to Stuga and in the second phase to connect Struga with the Albanian railway network while complying with UNESCO requirements for the Ohrid area as UNESCO protected cultural site. Construction of the line, together with other missing sections of Corridor VIII, would provide the population and national economy with cheaper and faster transportation. Connecting the Republic of North Macedonia with neighbouring countries by rail would contribute to economic development and strengthen economic and trade activities in the country and the region. The new link will improve the life and economic status of the local population, particularly in the areas served by railway stations. It will also contribute to regional development. Additionally, the line will connect the Republic of North Macedonia with the Republic of Albania, providing way access to the Adriatic ports of Durres and Vlore. This is of great importance for North Macedonia, a landlocked country.		
Expected Benefits	○ Would form part of the transnational route connecting the Mediterranean/Adriatic Transport Area with the Black Sea Transport Area; ○ Facilitation and boosting of trade exchanges between Bulgaria, North Macedonia and Albania; ○ Improvement of rail passenger services along the project section and to/from destinations such as Tirana, Skopje, and Bulgaria.		

Priority Project Name	Renewal and/or reconstruction works on Railway Corridor X		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	200	400	New Construction
Core Network segment	Strategic Projects		Technical status
Yes, Extended Core	National strategies, Single Project Pipeline		Reconstruction / Renewal
Project Description	The objective of this project is to renovate and reconstruct the railway line from Tabanovce Border with Serbia to Gevgelija Border with Greece (whole Corridor X).		
Expected Benefits	○ Facilitation and boosting of trade exchanges between Greece, North Macedonia and Serbia and Western and Central Europe; ○ Improvement of rail passenger services along the project section and to/from destinations such as Athens, Thessaloniki, Skopje, Belgrade, Zagreb, Budapest and beyond.		

Priority Project Name	Construction of Joint Railway Border Crossing Station (JRBS) and access road at Tabanovce between the Republic of North Macedonia and the Republic of Serbia		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	N/A	5.5	New Construction
Core Network segment	Strategic Projects		Technical status
Yes	National strategies, Single Project Pipeline		Detailed Design
Project Description	The Tabanovce railway border crossing is located along Corridor X, which is linked to TEN-T Networks. Strategically, it is one of the most important border crossings both for MKD and transport from Central Europe to SEE, including Turkey and Central Asia. The existing railway station is approximately 0.9 km northeast of Tabanovce village. The road and railroad Corridors X run almost parallel, both stretching north-south, and are approximately 0.5 km apart. Construction work includes building all facilities for border police, inspections, customs and railway staff.		
Expected Benefits	Common BCP between SRB and MKD. Implementation of this project will cut time spent at the border by 50% in passenger and freight traffic. The main benefits of Joint Railway Border Stations are time savings for trains, passengers and freight transiting borders between countries, as well as economies of scale because two separate stations are reduced to one. The proximity to the road border crossing at Tabanovce will allow the fast transfer of phytosanitary, veterinary and other specialised inspections between JRBS and the road station via a new access road to be constructed linking them.		



Regional Partner:

Montenegro

Double track sections

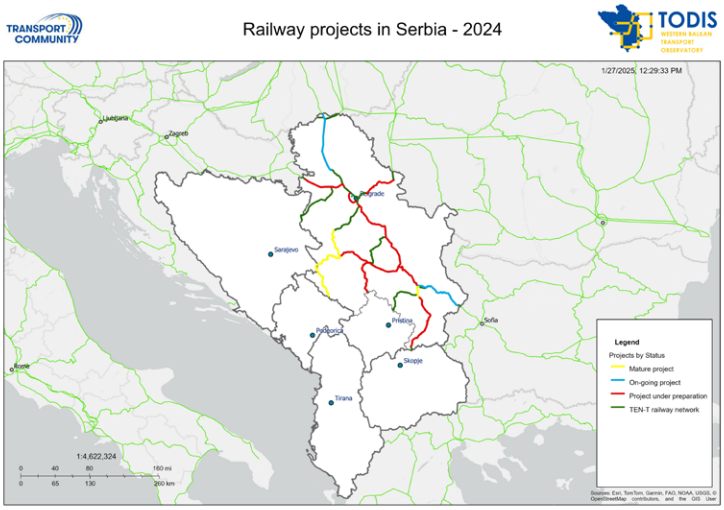
0 % or 0 km

Includes green and digital elements:

ERTMS
ETCS Level 1
Electrification

Figure 29. Overview of priority projects in Montenegro

Priority Project Name	**Reconstruction and Modernisation of the Podgorica - Tuzi - Cross Border Albania Railway Line**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Montenegro	25	84.4	Upgrade/Reconstruction
Core Network segment	Strategic Projects		Technical status
Yes	National strategies, Single Project Pipeline, EC Economic and Investment Plan (Flagship 3)		Feasibility study
Project Description	The Podgorica –Tuzi railway line (open railway 24.70km), was opened to traffic in 1986 and has 5 bridges, 3 tunnels and 24 culverts. There is one station at Tuzi. From 1992-2002, the line was closed for passenger traffic, and only freight transport was performed. The track was designed for train speeds of up to 100 km /h. The railway is equipped with all the necessary automatic, safety, signalling and telecommunication devices, but is not electrified. Investment involves the following: • Preparing design technical documentation • Track reconstruction and modernisation of structural objects on line • Modernisation and reconstruction of signalling- interlocking devices and contact line • Reconstruction and adaptation of station and cross-border facilities.		
Expected Benefits	The reconstruction and modernisation of the Podgorica-Tuzi railway line aims at increasing rail safety and security, reducing travel time, and average train speed. Other objectives are improved equality of services in railway traffic, evaluation of the capacity of the Port of Bar, and the development of tourism. The project would mean an appropriate development of economic activities, efficient functioning of the airport, and greater use of capacity at Bar Port. The overall achievement would be better infrastructure connections for transit traffic.		



Regional Partner:

Serbia

Double track sections

0% or 0 km

Includes green and digital elements:

Electrification

Figure 30. Overview of priority project in Serbia

Priority Project Name	**Reconstruction of the Resnik - Vrbnica - state border with Montenegro**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Serbia	210	1400	Reconstruction
Core Network segment	Strategic Projects		Technical status
Yes	National strategies, Single Project Pipeline		Feasibility study, EIAS
Project Description	Reconstruction of the railway section Resnik - Valjevo, a total length of 77,6 km, was completed in 2017. The total value of this project was 63,3 million €. Technical documentation was completed at the end of 2022. The start of the work and the completion depend on the process of contracting financial resources for the realisation of the project. The total length of this section is 210 km, and the estimated value is 1,4 billion €. The main goal is to achieve design parameters.		
Expected Benefits	Implementation of this project will mean better connectivity between Montenegro and Serbia and a better connection between the port of Bar and Belgrade.		

Priority Project Name	**Construction works on the Main Rail station - phase 2**		
Regional Partner **Serbia**	Length (km) N/A	Estimated cost (M€) 27	Type of works New infrastructure
Core Network segment **Yes**	Strategic Projects National strategies, Single Project Pipeline		Technical status Detail design
Project Description	Phase 2 consists of works on the construction of two tracks in a station with a platform and catenary, as well as other installations under the central concrete roof. Construction works will be part of the project “Modernisation of the rail sector in Serbia” managed by the World Bank. In the previous period, the revision of the technical documentation was completed and the Project for the building permit was prepared, which was adopted by the technical control. In the following period, it is expected that a tender will be announced for the selection of the contractor and the announcement of the call for the selection of supervision		
Expected Benefits	Implementation of this project will mean better quality of service for passengers.		

ANNEX 2 **Road Project Fiches**

Albania

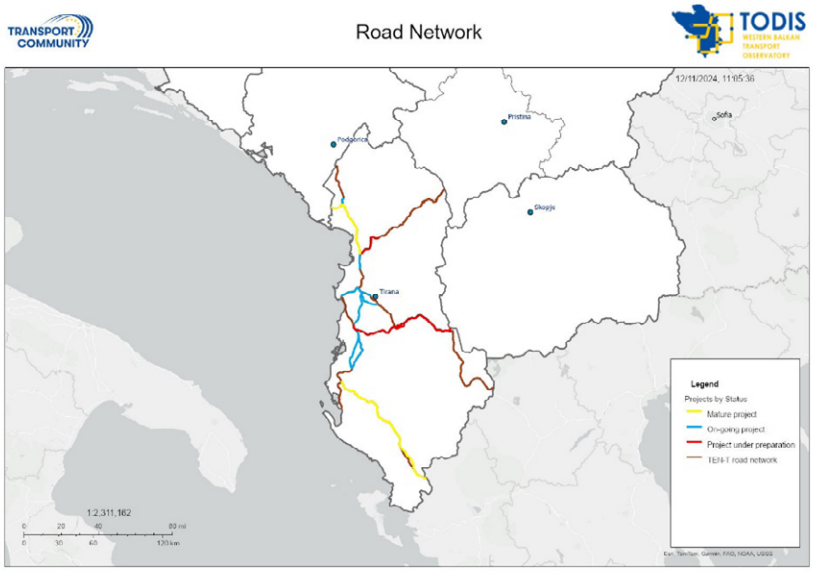


Figure 31. Overview of road priority project in Albania

Priority Project Name	**Construction of the Adriatic-Ionian highway in Albania**		
Regional Partner **Albania**	Length (km) 296	Estimated cost (M€) 3281.43	Type of works Upgrade/reconstruction
Core Network segment **Yes**	Strategic Projects Transport Sectoral Strategy, National Transport Plan, SPP, EIP Flagship 3		Technical status Feasibility Study (including Cost-Benefit Analysis)
Project Description	Albania plans to expand new sections to full motorway standard between Muriqan/ Sukobin border crossing to SH1 at Bushat south of Shkodër, Thumane-Kashar-Rrogozhina highway (part of Milot-Fier upgrade to motorway standards) linking with Fier Bypass and expanding south of Fier with a slight deviation at Pocem near Memaliaj. In Albania, the motorway will pass on the current stretch along the western lowland, bypass Tirana through the newly-planned Kashar-Rrogozhine motorway, continue south on the existing SH4, and turn inland at Fier towards Tepelene and Gjirokaster.		
Expected Benefits	Expected benefits of the project include: • better connections with neighbouring countries; • reduced congestion, fuel consumption, emissions and noise levels; • increased road safety levels, and • economic development, particularly in the tourism sector.		

Bosnia and Herzegovina

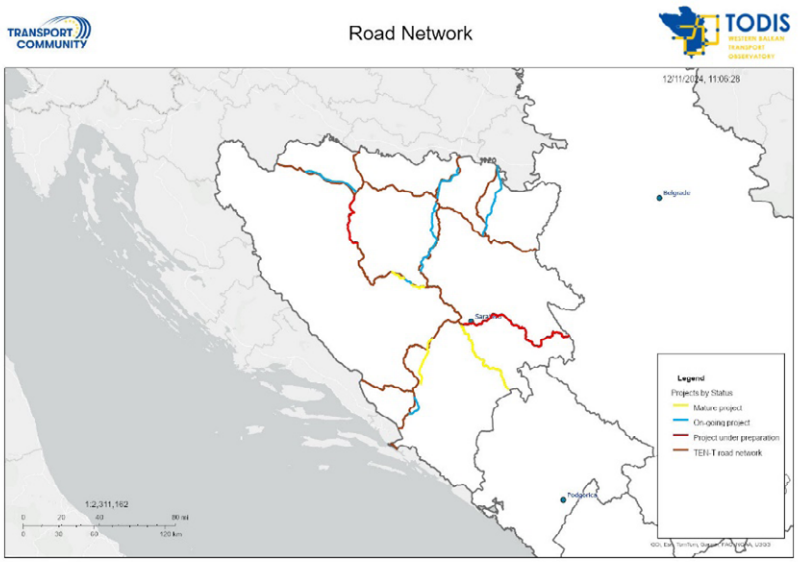


Figure 32. Overview of road priority project in Bosnia and Herzegovina

Priority Project Name	**Construction of the Corridor Vc motorway section: Ivan – Konjic (Ovcari) – exit from Prejn tunnel (Salakovac)**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Bosnia and Herzegovina	33	992	New infrastructure
Core Network segment	Strategic Projects		Technical status
Yes	Transport Sectoral Strategy, SPP, EIP Flagship 2		Feasibility Study (including Cost-Benefit Analysis)
Project Description	Construction of approx. 33 km of motorway on Corridor Vc in difficult mountainous terrain, including the 10 km-long Prenj Tunnel.		
Expected Benefits	Expected benefits include savings in travel time and vehicle operating costs for all types of vehicles, improved road safety, and a shift of traffic from densely populated urban zones to the newly built infrastructure.		

Priority Project Name	**Construction of the Corridor Vc motorway section: Exit from Prenj Tunnel (Salakovac) - Mostar North**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Bosnia and Herzegovina	12.34	188.8	New infrastructure
Core Network segment	Strategic Projects		Technical status
Yes	Transport Sectoral Strategy, SPP, EIP Flagship 2		Feasibility Study (including Cost-Benefit Analysis)
Project Description	Construction of motorway section on Corridor Vc.		
Expected Benefits	Expected benefits include savings in travel time and vehicle operating costs for all types of vehicles, improved road safety, and a shift of traffic from densely populated urban zones on the newly built infrastructure.		

Priority Project Name	Construction of the Turbe – Nevića Polje -Lašva expressway section		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Bosnia and Herzegovina	61	641	New infrastructure
Core Network segment	Strategic Projects		Technical status
No	Bosnia and Herzegovina's SPP		Detailed Design
Project Description	Construction of expressway on Route 2a, ensuring connection with Corridor Vc.		
Expected Benefits	Expected benefits include savings in travel time and vehicle operating costs for all types of vehicles, improved road safety, and a shift of traffic from densely populated urban zones towards the newly built infrastructure.		

Priority Project Name	Improvement and construction of the road route Sarajevo - Foca (Brod na Drini) - Hum (Scepan Polje) with the interstate bridge at the BIH/MNE border		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Bosnia and Hercegovina	25	300	New infrastructure
Core Network segment	Strategic Projects		Technical status
No	Transport Sectoral Strategy, SPP, EIP Flagship 2		Detailed Design with the Tender Documentation
Project Description	Construction/improvement of main road on route Sarajevo – border with Montenegro.		
Expected Benefits	Expected benefits include savings in travel time and vehicle operating costs for all types of vehicles, improved road safety, and improved regional connectivity.		

North Macedonia

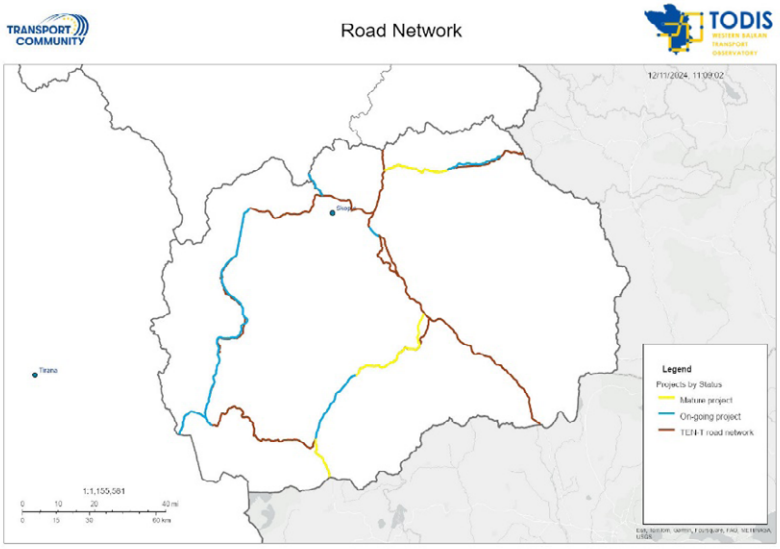


Figure 33. Overview of road priority project in North Macedonia

Priority Project Name	**The construction of new Romanovce – Stracin express road**		
Regional Partner **North Macedonia**	Length (km) 40	Estimated cost (M€) 88	Type of works Reconstruction/ rehabilitation
Core Network segment **Yes**	Strategic Projects Transport Sectoral Strategy, SPP		Technical status Detailed Design and Tender Documentation
Project Description	Construction of new Romanovce – Stracin express road.		
Expected Benefits	The project's overall objective is to improve mobility, accessibility and road safety.		

Priority Project Name	**The construction of the road section of the Prilep-Raec Bridge**		
Regional Partner **North Macedonia**	Length (km) 8	Estimated cost (M€) 8.8	Type of works Reconstruction/ rehabilitation
Core Network segment **No**	Strategic Projects Transport Sectoral Strategy, SPP		Technical status Detailed design and Tender Documents
Project Description	The section from Prilep to Raec comprises the following subsections: • Prilep – Lenishka River to be reconstructed as an express road; • Belovodica – Kamenolom Mavrovo to be reconstructed and a third lane added.		
Expected Benefits	Expected benefits include savings in travel time and vehicle operating costs for all types of vehicles, improved road safety, and a shift of traffic from densely populated urban zones towards the newly built infrastructure.		

Priority Project Name	The construction of the Bitola – Medzitlija expressway, including the Bitola interchange		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	16	50	Reconstruction/ rehabilitation
Core Network segment	Strategic Projects		Technical status
No	Transport Sectoral Strategy, SPP		Detailed design with the tender documentation
Project Description	Construction of Bitola – Medzitlija expressway, including Bitola interchange.		
Expected Benefits	The overall project objective is to improve mobility and reduce traffic pollution while improving road safety.		

Priority Project Name	Construction of road section Veles-Prilep		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	63	295	Reconstruction/ rehabilitation
Core Network segment	Strategic Projects		Technical status
No	Transport Sectoral Strategy, SPP		Detailed design with the tender documentation
Project Description	Construction of road section Veles-Prilep		
Expected Benefits	The overall project objective is to improve mobility and reduce traffic pollution while improving road safety.		

Priority Project Name	Rehabilitation of the road section: Gevgelija-Greek border (Bogorodica)		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	5	1.5	Reconstruction/ rehabilitation
Core Network segment	Strategic Projects		Technical status
Yes	Transport Sectoral Strategy, SPP		Detailed design & Tender Documentation
Project Description	Rehabilitation of road section in the country's north-central region connecting North Macedonia with Greece along Corridor X (right carriageway).		
Expected Benefits	The overall project objective is to reduce traffic congestion and pollution while improving road safety.		

Priority Project Name	Rehabilitation of Negotino – TEC Negotino road section		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	6	8	Reconstruction/ rehabilitation
Core Network segment	Strategic Projects		Technical status
Yes	Transport Sectoral Strategy, SPP		Detailed design & Tender Documentation
Project Description	Rehabilitate road section: A1 Negotino – TEC Negotino on Corridor X.		
Expected Benefits	The overall project objective is to improve mobility and reduce traffic pollution while improving road safety.		

Priority Project Name	Rehabilitation of Gradsko-Stobi road section		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
North Macedonia	4	4.5	Reconstruction/ rehabilitation
Core Network segment	Strategic Projects		Technical status
Yes	Transport Sectoral Strategy, SPP		Detailed design & Tender Documentation
Project Description	Rehabilitate road section: A1 Gradsko - Stobi on Corridor X.		
Expected Benefits	The overall project objective is to improve mobility and reduce traffic pollution while improving road safety.		

Montenegro

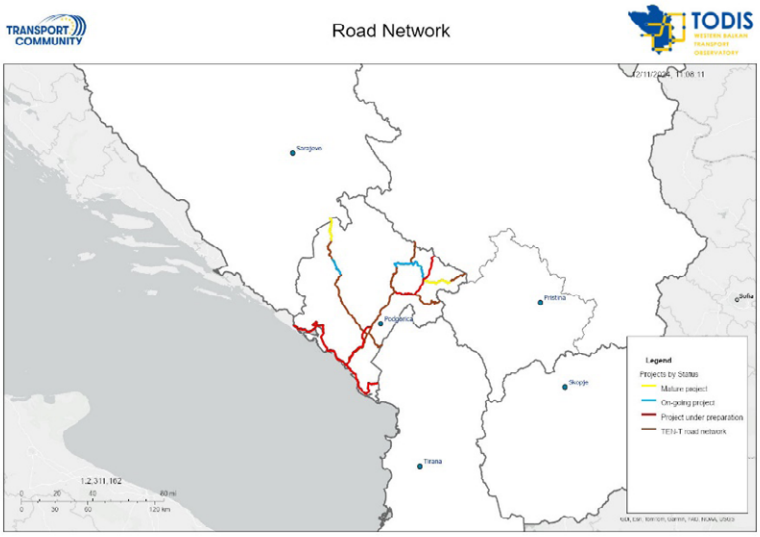


Figure 34. Overview of road priority project in Montenegro

Priority Project Name	**Adriatic-Ionian expressway along Montenegrin coast**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Montenegro	110	1013	Upgrade/ reconstruction
Core Network segment	Strategic Projects		Technical status
Yes	Montenegro Spatial Plan, Transport Strategy, EIP Flagship 3		Feasibility Study (including Cost-Benefit Analysis)
Project Description	The expressway along the Montenegrin coast passes through its hinterland. It starts near the Croatian border around Herceg-Novi and extends further to the following sections: Herceg Novi – across the Bay of Kotor - Tivat - Budva - Bar - Ulcinj - Sukobin (Albanian border), total length is approximately 110 km. Technical documentation is at different levels for all subsections, but the last prepared is the Preliminary Design for the Budva bypass. Currently a new Conceptual Design for the passing through Boka Bay is being prepared, and after this, the final alignment of the entire Blue Highway through Montenegro will be defined.		
Expected Benefits	The main objective of this project is to improve connectivity in the region and with the EU as a key factor for growth and jobs in the Western Balkans.		

Priority Project Name	**Reconstruction of the trunk road Šćepan Polje-Plužine (border crossing with Bosnia and Hercegovina)**		
Regional Partner	Length (km)	Estimated cost (M€)	Type of works
Montenegro	19,9	139	Reconstruction/ rehabilitation
Core Network segment	Strategic Projects		Technical status
No	Transport Sectoral Strategy, SPP, EIP Flagship 2		Preliminary Design
Project Description	Construction/improvement of main road on route Sarajevo – border with Montenegro.		
Expected Benefits	Expected benefits include savings in travel time and vehicle operating costs for all types of vehicles, improved road safety and improved regional connectivity.		

ANNEX 3 **Waterborne Project Fiches**

Priority Project Name	Demining of the right bank of the Sava River		
Regional Partner **Bosnia and Herzegovina**	Length (km) N/A	Estimated cost 8,160,000	Type of works Upgrade/reconstruction
Core Network segment **Yes**	Strategic Projects Part of the Economic and Investment Plan for WB (Flagship 1)		Technical status Feasibility Study done (including Cost-Benefit Analysis)
Project Description	The demining of the right bank of the Sava River in B&H is part of Phase I of the project. To unlock Phase I and Phase II investments, first, the right bank of Sava in B&H needs to be demined to facilitate safe navigation and allow technical surveys needed to design waterway improvement projects during Phase I, which will then be implemented in Phase II. Areas that need to be demined include 10 municipalities in Republika Srpska and the Federation of Bosnia and Herzegovina: Odzak, Brcko, Domaljevac, Samac, Orasje, Kozarska Dubica, Gradiska, Srbac, Derventa, Brod, Samac (43 clearance and 101 technical survey projects).		
Expected Benefits	The project will unlock investments and enable inland waterway improvement by removing bottlenecks. However, the finalization of a detailed design for eliminating bottlenecks in certain sections (most importantly, the Jaruge – Novi Grad section between B&H and Croatia) is not possible without demining, as field investigation must be carried out in areas at present contaminated by mines.		

Priority Project Name	Construction of the New Integrated Port in Porto Romano Phase 1		
Regional Partner **Albania**	Length (km) N/A	Estimated cost €390,000,000	Type of works Construction of a new port
Core Network segment **Yes**	Strategic Projects Core Maritime Port		Technical status Feasibility Study done (including Cost-Benefit Analysis)
Project Description	The new port in Porto Romano is expected to be one of the largest and most advanced in the Adriatic Sea. The design aims to create a modern and sustainable port facility that will meet the highest international standards in efficiency and environmental responsibility. The contract is expected to be signed in the first quarter of 2025, following the evaluation of bids and completion of the selection process.		
Expected Benefits	This project marks a significant step in Albania's efforts to modernise its maritime infrastructure, boosting its economic growth and increasing its role in international trade routes. The new port will also complement the development of other infrastructure projects in the region, such as road and rail links, creating an integrated logistics corridor that connects Albania with other parts of Europe and beyond		

Priority Project Name	Construction of the New Integrated Port in Triporti, Vlore		
Regional Partner	Length (km)	Estimated cost	Type of works
Albania	N/A	€60,000,000	Construction of a new port
Core Network segment	Strategic Projects		Technical status
Yes	Comprehensive Maritime Port		Feasibility Study done (including Cost-Benefit Analysis)
Project Description	The new integrated port in Treporti, Vlore is expected to process cargo and passengers and replace the existing commercial Port of Vlora. The design aims to create an integrated, modern and sustainable port facility that will meet the highest international standards in efficiency and environmental responsibility. The contract for the construction and operation of the port is signed in the first quarter of 2024, and the construction works will start as soon as the concessionary has all necessary licenses and permits.		
Expected Benefits	This project marks a significant step in Albania's efforts to modernise its maritime infrastructure, boosting its economic growth and increasing its role in international trade routes. The new port will also complement the development of other infrastructure projects in the region, such as road and rail links, creating an integrated logistics corridor that connects Albania with other parts of Europe and beyond		

Priority Project Name	Removal of the sunken German fleet in the Danube River		
Regional Partner	Length (km)	Estimated cost	Type of works
Serbia	from km 857 to km 862	€29.1 million	Removal of sunken vessels
Core Network segment	Strategic Projects		Technical status
Yes	Rhine – Danube Corridor Economic and Investment Plan for the Western Balkans 2021-2027 (Flagship 1)		Feasibility Study done (including Cost-Benefit Analysis)
Project Description	Downstream of the Đerdap II dam at Prahovo, a large graveyard of shipwrecks is present along the border between Serbia and Romania. These wrecks date from the end of the Second World War when these vessels were left behind and sunk by retreating German forces. The exact number of vessels located on this stretch is unknown, but 23 sunken vessels have an influence on the safety of navigation, since their presence narrows the minimum fairway width from 180m to 100m during low water seasons. Since the sunken ships were part of the German war fleet, there are unexploded ordnance (UXO) and Explosive Ordnance Disposals (EODs) on board them, which present constant danger for human lives, the environment and threatening navigation, in particular in cases where hazardous substances are transported (such as oil, gases, flammable substances, etc.). The vessels and the unexploded ordnance have to be removed. Some vessels are partly positioned within the fairway, and passing ships need to sail very cautiously on this section, as a collision between vessels and wrecks may result in calamities and even cause an ordnance explosion. The navigation situation is characterised as hazardous, especially during periods of low water.		
Expected Benefits	To provide a prescribed fairway width of 180 m and improve conditions for safe navigation on the Danube, particularly during the low water level periods.		

Priority Project Name	Expansion of the capacity of the Danube River port of Prahovo		
Regional Partner	Length (km)	Estimated cost	Type of works
Albania	N/A	€36.3 million	Construction works
Core Network segment	Strategic Projects		Technical status
Yes	Comprehensive Inland Waterway Port		Feasibility Study done (including Cost-Benefit Analysis)
Project Description	The reconstruction and expansion of existing facilities, and the construction of new port capacities at the Prahovo port.		
Expected Benefits	The new capacities of the port will also complement the development of other infrastructure projects in the region, such as road and rail links, creating an integrated logistics corridor that connects the port with other networks and beyond		

Priority Project Name	New Port of Belgrade and Free Trade Zone		
Regional Partner	Length (km)	Estimated cost	Type of works
Albania	N/A	€180 million	Construction works
Core Network segment	Strategic Projects		Technical status
Yes	Core Inland Waterway Port		Feasibility Study done (including Cost-Benefit Analysis)
Project Description	The project's main goal is to establish a multimodal hub connecting the future New Port of Belgrade with the TEN-T Rhine-Danube Corridor and major roads (E-70, E-75, Belgrade-Vršac, Belgrade-Zrenjanin) and the Belgrade-Kelebija (Budapest) railway. The Railway Corridor X Rehabilitation in Serbia, including branches Xb and Xc, along with a new rail link between the New Port and the Belgrade-Kelebija line, will integrate the port with key TEN-T corridors, such as the Orient/East-Med, Mediterranean, and Baltic-Adriatic Corridors.		
Expected Benefits	An increase in port terminal capacity from 190,407 tonnes to 3,500,000 tonnes and increased port terminal capacity for Ro-Ro to 11,500, liquid capacity to 750,000 t, and 350,000 containers		

Priority Project Name	The expansion of capacities of the Port of Sremska Mitrovica		
Regional Partner	Length (km)	Estimated cost	Type of works
Albania	N/A	€180 million	Construction works
Core Network segment	Strategic Projects		Technical status
Yes	Comprehensive Inland Waterway Port		Feasibility Study ongoing (including Cost-Benefit Analysis)
Project Description	The feasibility study and preliminary project are underway, while the local government has recently adopted the Detailed Regulation Plan. The design proposes a pool-type port at Sremska Mitrovica, expanding beyond the current multipurpose terminal to include three new terminals for grains, liquid cargo (oil and oil products), and bulk cargo (rock aggregates). The preliminary project will outline essential infrastructure, such as road and rail links, an operating coast area, and support facilities, including a management building, parking for cargo and passenger vehicles, ramps, and other operational features.		
Expected Benefits	The port aims to handle at least 1.5 million tons of cargo annually.		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