

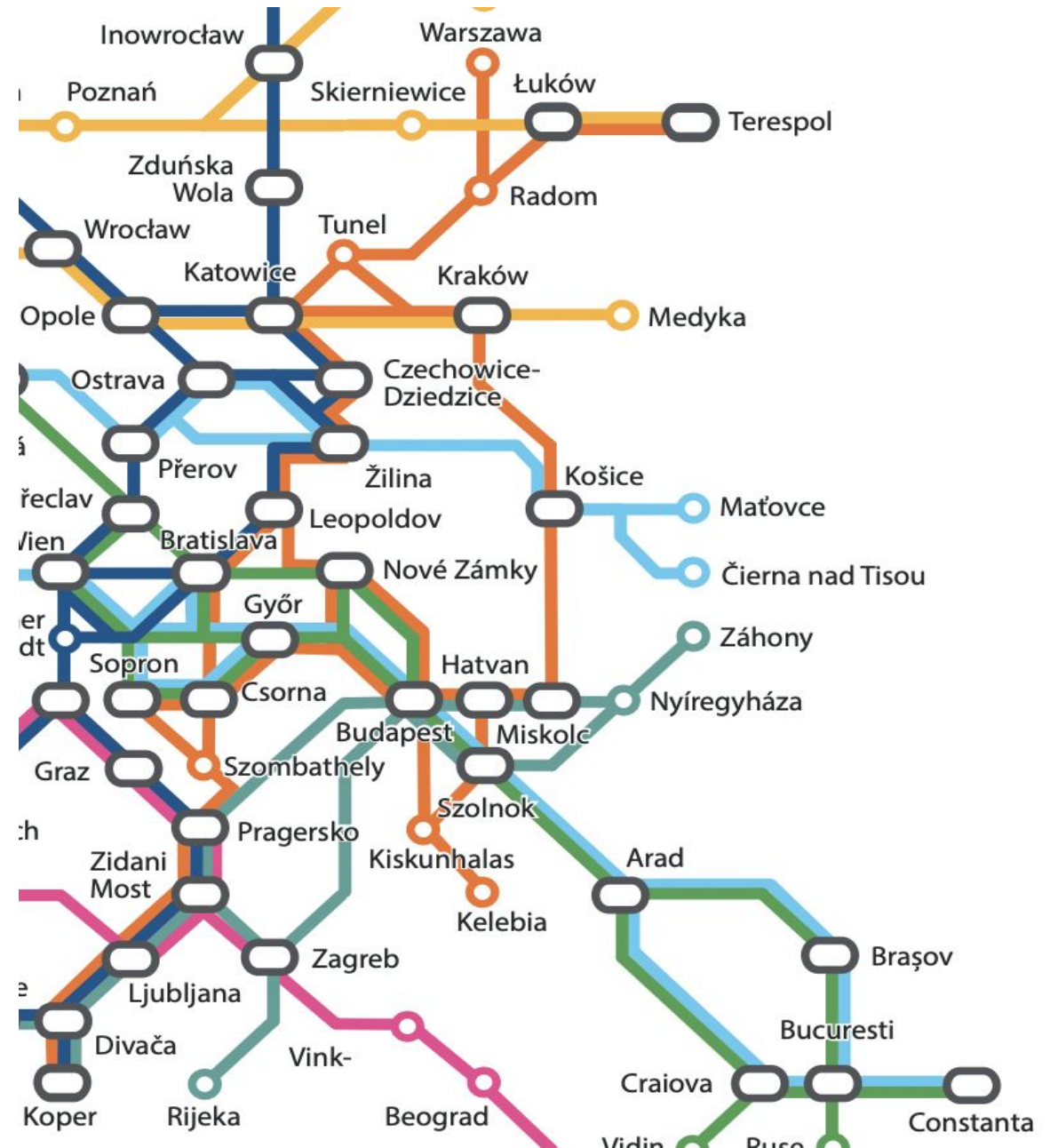


How to increase modalshare of rail freight on the  
Western Balkan < > EU transport market?

# TERMINAL HORGOS

# In the context of EU RFCs

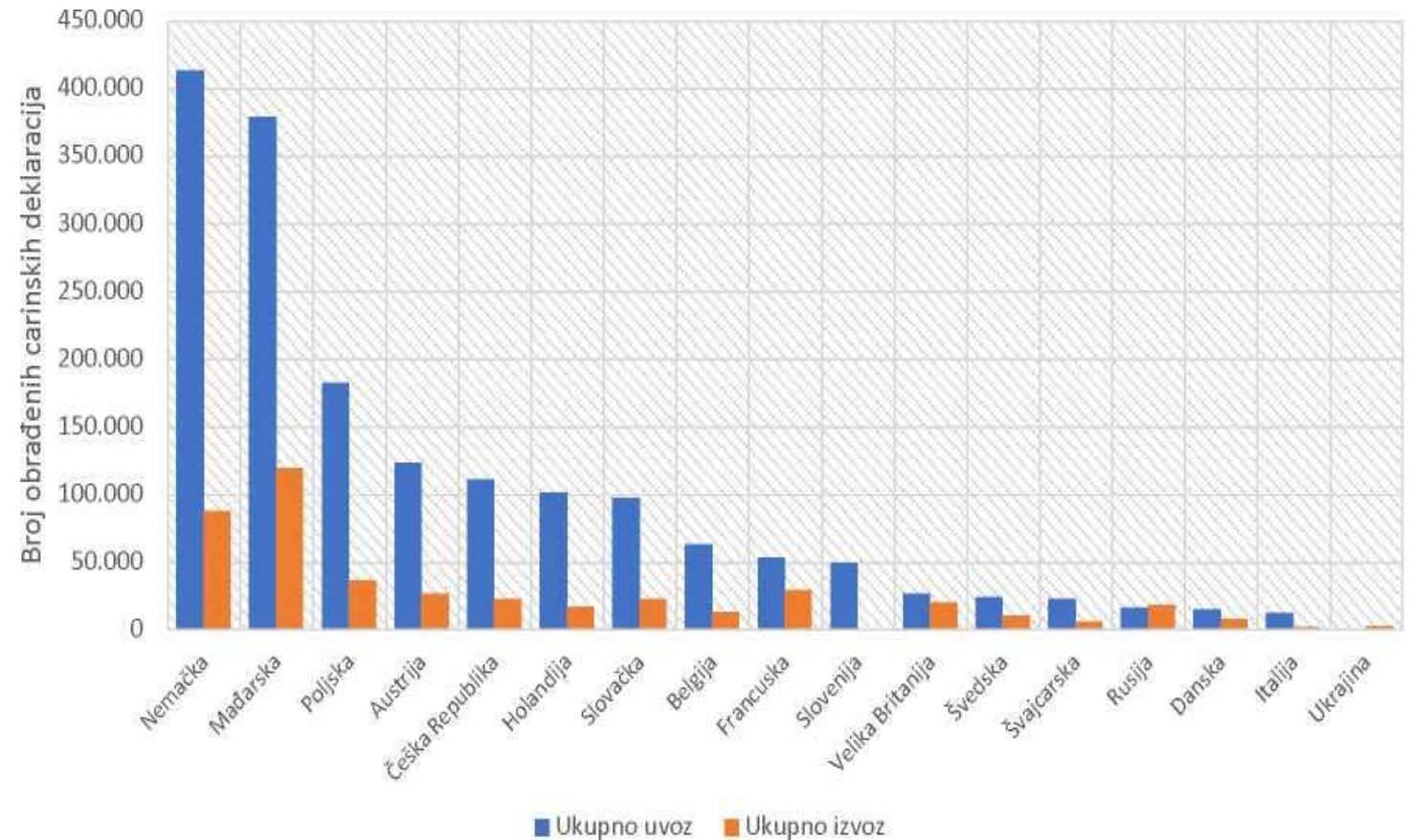
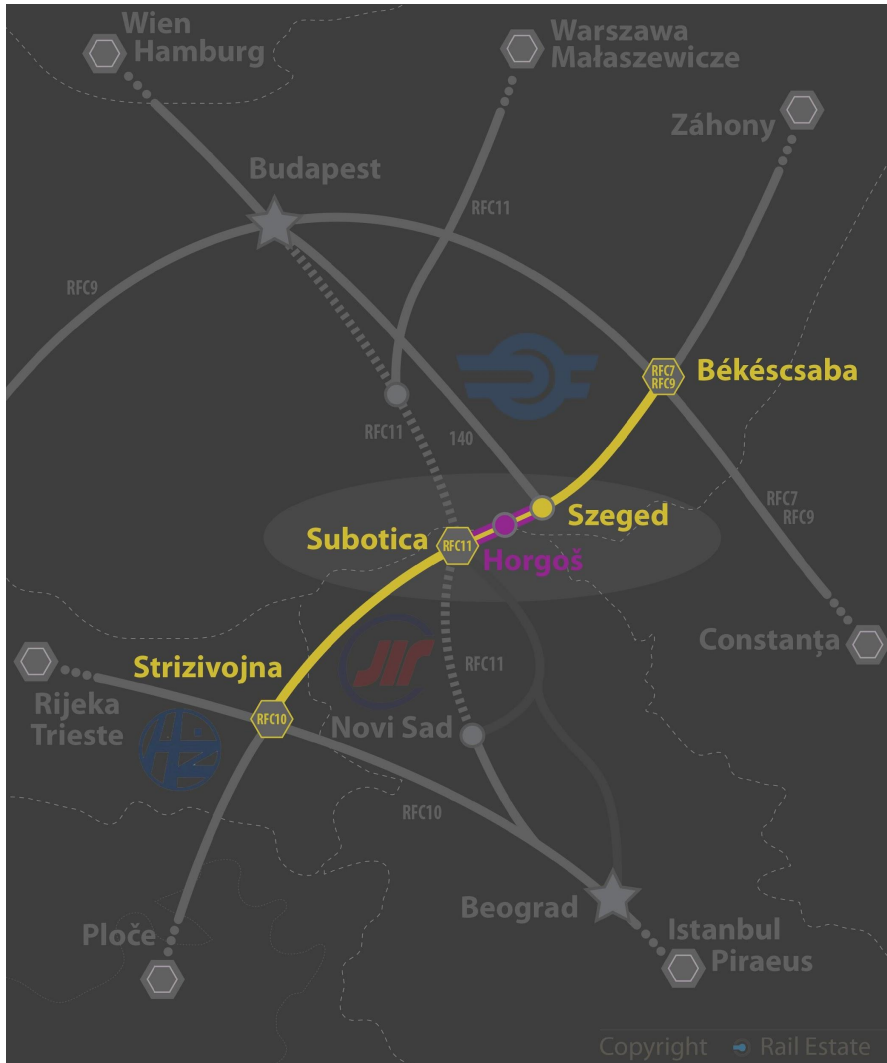
- RFC1 Rhine - Alpine
- RFC2 North Sea - Mediterranean
- RFC3 Scandinavian - Mediterranean
- RFC4 Atlantic
- RFC5 Baltic - Adriatic
- RFC6 Mediterranean
- RFC7 Orient / East-Med
- RFC8 North Sea - Baltic
- RFC9 Rhine - Danube
- RFC10 Alpine - Western Balkan
- RFC11 Amber



# In the context of South East Europe



# Between corridors at the SRB-HUN border



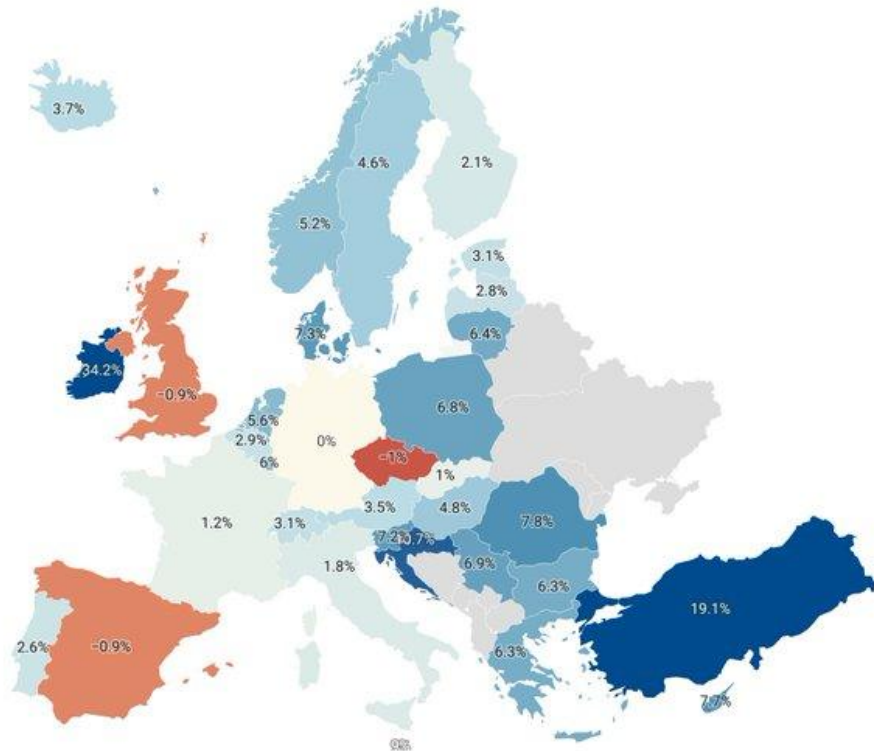
Total number of import and export customs declarations by destinations at border crossings Horgoš and Kelebija in 2017-2021. (Blue line marks import to Serbia, orange is export) (The first five destinations are: Germany, Hungary, Poland, Austria, Czechia, the rest of the countries are Western Europe and Russia/Ukraine)

# Indicators

## GDP: Total Cumulative Growth since COVID-19 Outbreak (2019Q4 – 2022Q4)

Seasonally adjusted GDP as chain-linked volumes (data at previous year's prices, linked over the years via appropriate growth rates).

EU: 2.8%  
Euro Area: 2.5%



Luxembourg: Latest data as of 2022Q3

Iceland: Statistics Iceland (statice.is)

Türkiye: Turkish Statistical Institute (data.tuik.gov.tr)

United Kingdom: Office for National Statistics (ons.gov.uk)

Map: u/Divansinc - Source: Eurostat 2023 - Created with Datawrapper

Table 1 Lorry traffic across border crossings for road traffic Horgoš and Kelebija in the period 2017-2021

The year	CI Terminal Horgoš	CI Terminal Kelebija	In total
2017	181.488	109.765	291.253
	62.31 %	37.69 %	
2018	180.951	111.723	292.674
	61.83 %	38.17 %	
2019	181.260	117.127	298.387
	60.75 %	39.25 %	
2020	186.054	117.750	303.804
	61.24 %	38.76 %	
2021	195.210	141.399	336.609
	57.99 %	42.01 %	
<b>In total</b>	<b>924.963</b>	<b>597.764</b>	<b>1.522.727</b>

Table 6 Number of trains received and dispatched for the carriage of goods on the border crossing Subotica – Kelebija in the period between 2018-2021

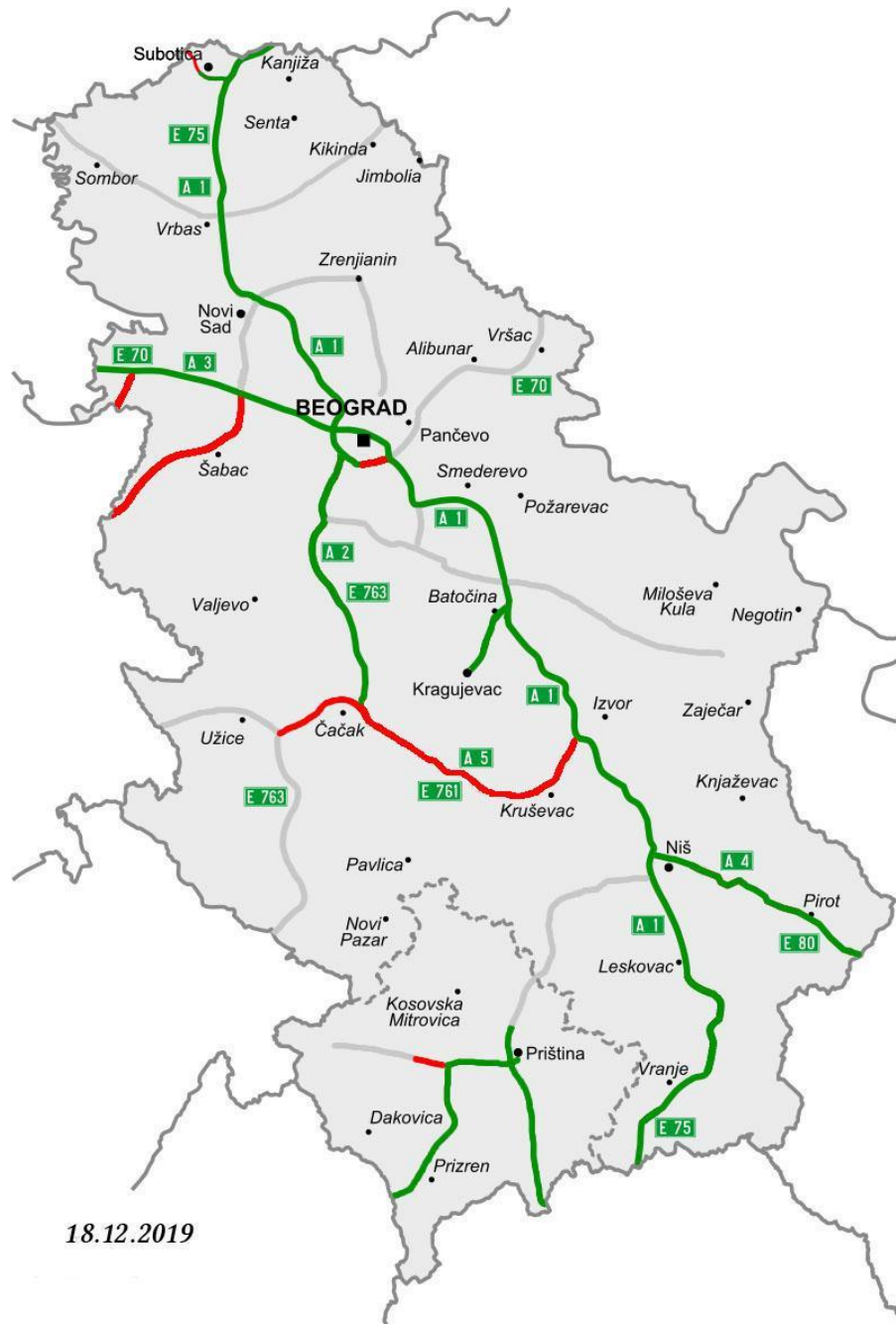
	2018	2019	2020	2021*
<b>Number of trains</b>	3.419	3.274	2.737	2.712
<b>Average daily trains</b>	9,37	8,97	7,50	7,43
	2.563	2.414	1.815	1.794
	7,02	6,61	6,65	6,57

\* For 2021 the data presented until September (First column marks the number of received trains, the second the number of dispatched trains)

# Legal framework

- **Bilateral agreements between the Republic of Serbia and Hungary**
  - *Agreement between the Government of the Republic of Serbia and the Government of Hungary on cross-border railway traffic – **mutual acceptance of safety certificates and train driver licences&certificates at the first border station;***
- **Railway System Interoperability Act and Technical Specifications for Interoperability**
  - *TSIs are the technical specifications with which each sub-system or part of the railway system sub-system is covered in order to meet essential requirements and to ensure interoperability;*
  - ***TSIs are** not directly **applied by the Republic of Serbia**, but those published by the Railways Directorate in the Official Gazette of the Republic of Serbia;*
- **TAF TSI (EU) No 1305/2014 and its amendments**
  - ***ETA is calculated** on the basis of information exchanged between the carrier and the infrastructure manager. **ETI for wagons also represents the ETI for the intermodal container;***
  - *Train composition message exchange*
- **INF TSI (EU) No 1299/2014 and its amendments**
  - *For freight transport lines with a GC gauge, an **axle load of 22.5 t** and a design speed of 120 km/h, the **minimum length of the TSI track** shall be **740 metres**.*

# The problem



18.12.2019



Table 7 Railway traffic performances on main track routes in international railway traffic according to data "Serbia Cargo" a.d. in 2018

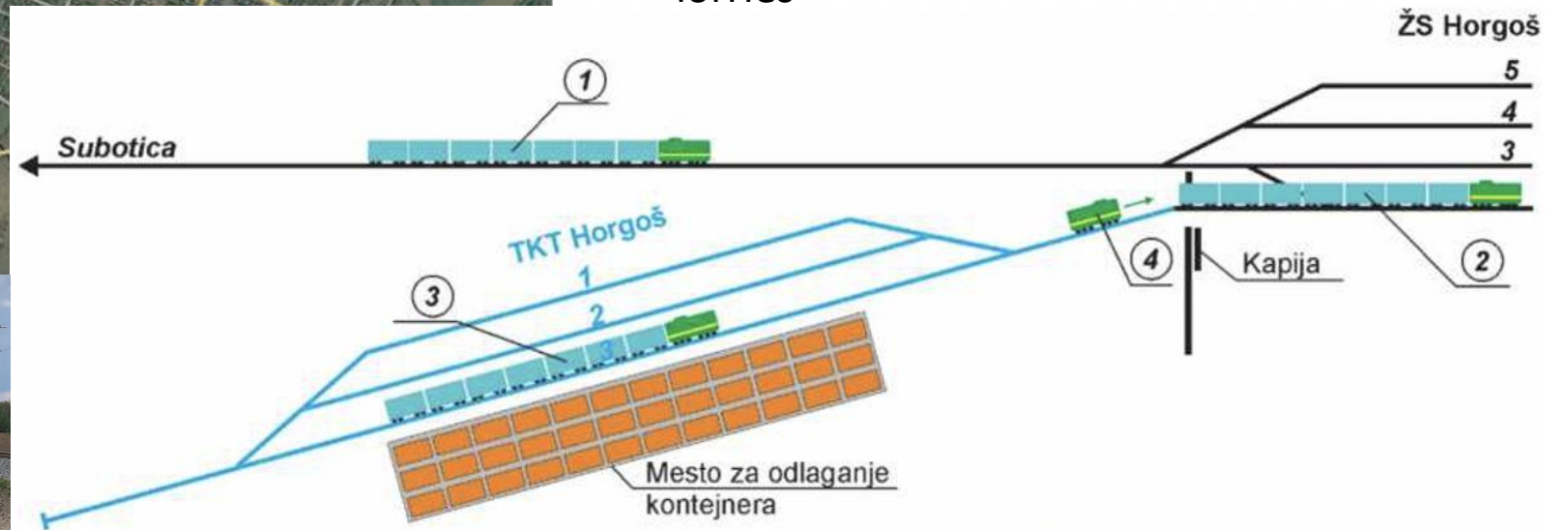
Transit route and direction	Length (km)	Average time of transit (h)	Average speed (km/h)	Goods transported (in 1,000 tonnes)	The Alternative Route
<b>Subotica</b> — Dimitrovgrad	548	24	23,0	643,0	Corridor IV or the road
Dimitrovgrad — <b>Subotica</b>				680,0	
<b>Subotica</b> — Preševo	603	30	19,0	520,0	Corridor IV or the road
Preševo — <b>Subotica</b>		32		295,0	
Sid — Belgrade	120	16	7,5	132,3	The road
Belgrade — Sid		15	8,0	97,9	
<b>Subotica</b> — Prijepolje	503	42	12,0	26,8	The road
Prijepolje — <b>Subotica</b>				23,7	

\* Data from the report on the transport market of goods in railway traffic in the Republic of Serbia (2020).

# The solution



- An intermodal terminal up to 4 railway tracks with 740m operational length
- Common custom control of SRB-HUN customs in one area
- Semi-trailer and other ILU lifting operations to eliminate waiting times for drivers and lorries





# The potential

Table 34 Forecast of ILU numbers for transshipment in the terminal by real forecast variant

Year	Export of ILU	Import of ILU	Transit of ILU	From ports	Annual ILU number	Daily no. of ILU
2024	6.538	6.625	2.710	11.326	27.199	75
2025	7.038	7.138	2.894	12.458	29.528	81
2026	7.576	7.692	3.086	13.704	32.058	88
2027	8.155	8.290	3.290	15.074	34.808	95
2028	8.778	8.935	3.507	16.582	37.801	104
2029	9.448	9.631	3.739	18.240	41.058	112
2030	10.170	10.383	3.986	20.064	44.602	122
2031	10.947	11.194	4.259	22.070	48.471	133
2032	11.783	12.071	4.551	24.277	52.683	144
2033	12.684	13.018	4.863	26.705	57.270	157
2034	13.653	14.041	5.197	29.376	62.266	171

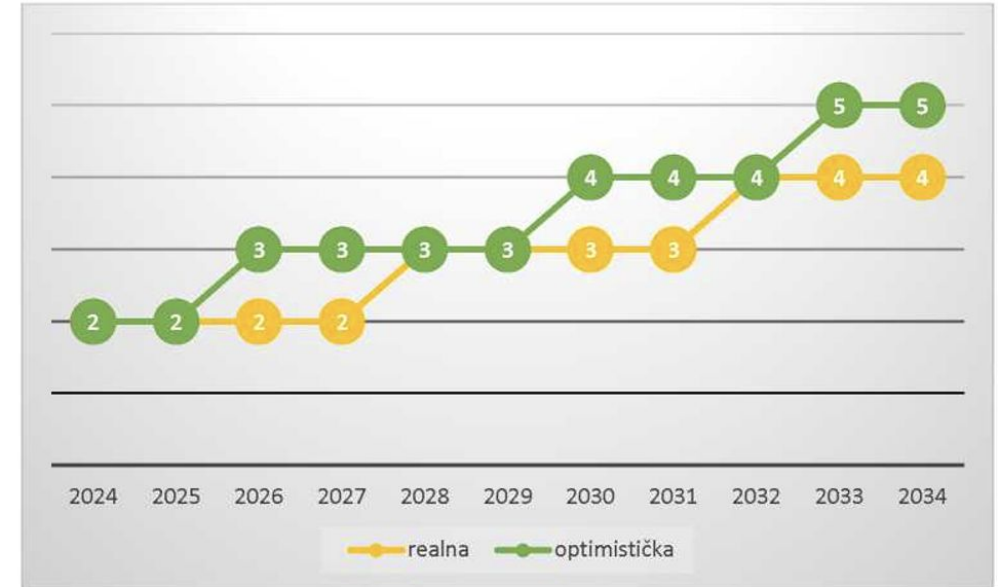


Figure 50 Comparative view of the daily number of trains to be dispatched, by forecast variants

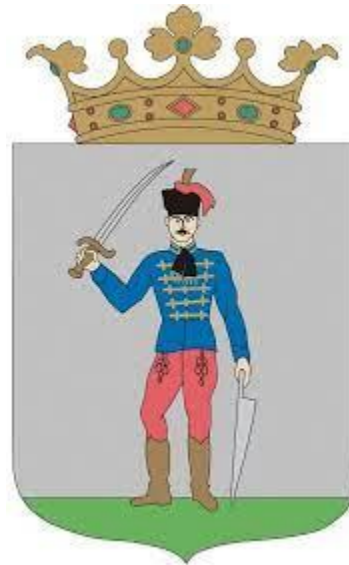
# Be part of a success story, open to Balkans!

The project is open to strategic investors in port and terminal operation business as well as for Railway Undertakings interested in to enter the freight market of non-EU countries.

Stakeholders:



Dibex d.o.o. is a trucking and freight forwarding company seated in Kanjiža, operating trucks and consignments all around Europe



Municipality of Kanjiža



Rail Estate d.o.o. is the owner and developer of Polazak.com a search engine and ticketing platform for public transport in Serbia, seated in Belgrade

Ask your free copy of the first phase of  
the Feasibility Study:

[rihard.dobo@dibex.net](mailto:rihard.dobo@dibex.net)

# Thank you for your attention!

# TERMINAL HORGOS

