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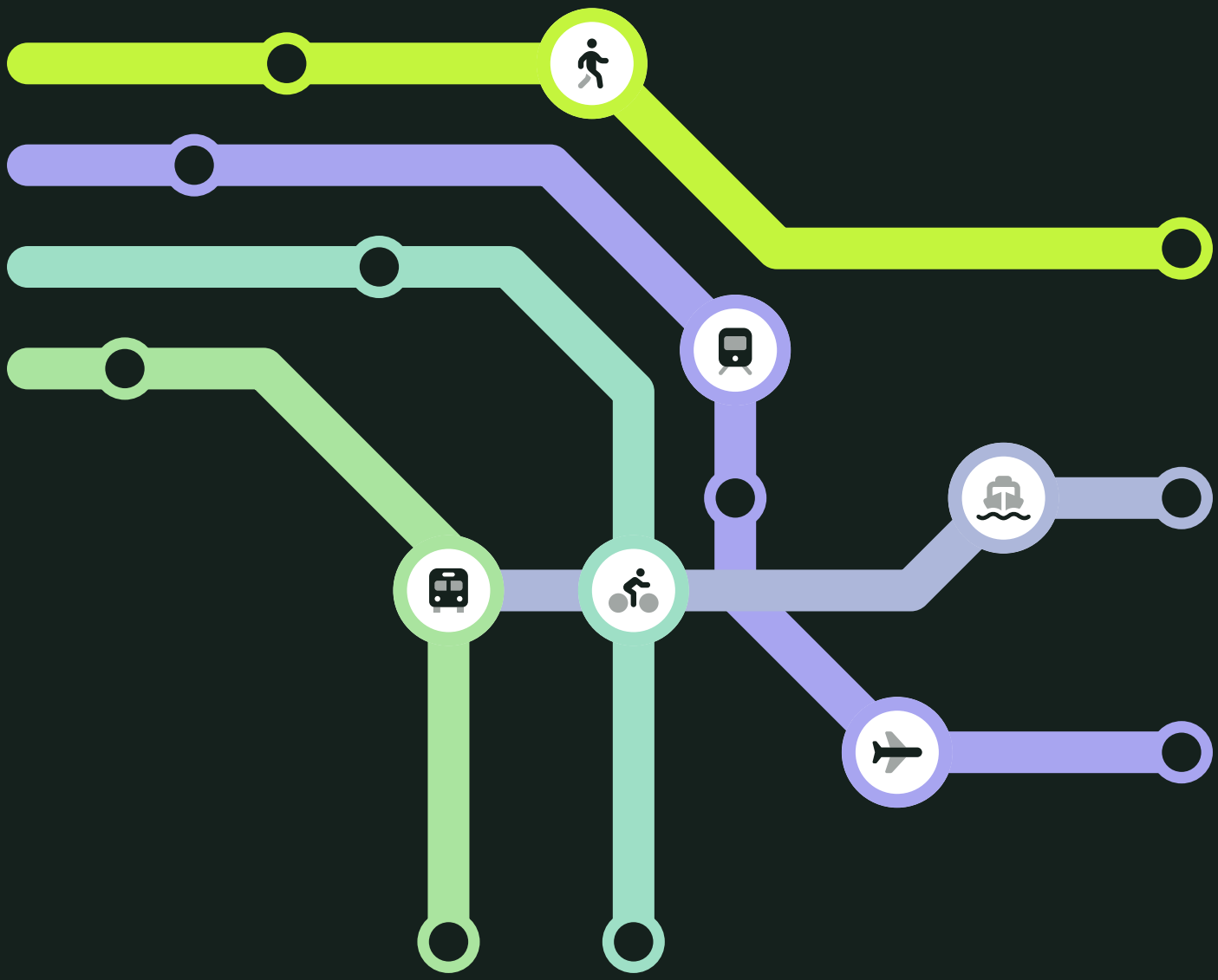
OPEN SOCIETY FOUNDATIONS WESTERN BALKANS

TRANSPORT COMMUNITY

POLICY BRIEF

TEN-T in the Western Balkans and Croatia

A guide to the legal framework and requirements



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POLICY BRIEF

TEN-T in the Western Balkans and Croatia: a guide to the legal framework and requirements

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Introduction

Urban mobility is a key component of sustainable economic development, social inclusion and environmental protection across Europe. As urban areas continue to grow and demand for mobility increases, cities across the region face growing challenges related to traffic congestion, air pollution, greenhouse gas emissions, road safety and accessibility. Cities cover only 4% of Europe's total land area, yet they are home to 75% of its population. Cities also account for more than 65% of total energy consumption and 70% of CO_2 emissions. Addressing these challenges requires a structured, integrated and forward-looking approach to urban transport planning.

At the European level, the New EU Urban Mobility Framework provides the strategic foundation for developing safe, accessible, inclusive and zero-emission urban mobility systems. It promotes the adoption of Sustainable Urban Mobility Plans (SUMPs) as a key planning instrument that ensures integrated, multimodal and user-centred transport solutions.

Regulation (EU) 2024/1679 establishes the revised legal framework for the development of the Trans-European Transport Network (TEN-T), with the aim of creating an integrated, multimodal, interoperable and sustainable transport system across the European Union and associated countries. The Regulation defines a hierarchical network structure comprising the core, extended core and comprehensive networks, with clearly established completion deadlines of 2030, 2040 and 2050. Particular emphasis is placed on removing bottlenecks, especially on cross-border sections, and strengthening territorial cohesion by connecting urban, rural and peripheral areas. Special attention is given to the development of rail and waterborne transport as the backbone of sustainable mobility, while simultaneously improving road and air transport infrastructure to support multimodality. The Regulation also highlights the role of urban nodes as key integration points between long-distance and urban transport, the development of multimodal logistics terminals and the implementation of digital and intelligent transport systems to improve efficiency and safety. In the context of climate objectives, the Regulation promotes the decarbonisation of the transport sector through the development of alternative fuels infrastructure and greater network resilience to climate-related and other disruptions. Its implementation is based on projects of common interest and coordination through European Transport Corridors. [1]

In the Western Balkans, the **Strategy for Sustainable and Smart Mobility in the Western Balkans (SSMS)**, developed by the Transport Community in 2021, aligns regional transport policy with the European Green Deal and the EU Sustainable and Smart Mobility Strategy.

It sets out a clear pathway towards a greener, safer and more digitalised transport system, including specific objectives related to the decarbonisation of urban transport, modal shift, the establishment of alternative fuels infrastructure and the digitalisation of mobility services. [2]

Trans-European Transport Network (TEN-T)

The Trans-European Transport Network (TEN-T) is a key European Union instrument for planning and developing coordinated, efficient, multimodal and high-quality transport infrastructure throughout the EU. The network comprises railways, inland waterways, short-sea shipping routes and roads connecting urban nodes, maritime and inland ports, airports and terminals. Its primary objective is to facilitate efficient passenger and freight transport, ensure access to jobs and services and enable trade and economic growth. By connecting transport systems across borders without gaps, bottlenecks or missing links, TEN-T strengthens the economic, social and territorial cohesion of the European Union. Furthermore, in line with the 2024 revision, the network places strong emphasis on reducing the negative environmental and climate impacts of transport and improving the safety and resilience of the entire transport system. [3]

The implementation and development of the Trans-European Transport Network are supported by key legislative and strategic initiatives, primarily reflected in two main pillars [3]:

- **Advancing the Trans-European Transport Network (TEN-T):** This Directive directly supports the development of the TEN-T network by facilitating and accelerating administrative processes and permit-granting procedures for cross-border infrastructure projects.
- **Military mobility:** This EU initiative aims to ensure the swift and seamless movement of military personnel, equipment and assets within and beyond the EU, including in emergencies, at short notice and on a large scale. In this context, the Trans-European Transport Network serves a dual purpose (military and civilian), while the European Commission, in cooperation with Member States, ensures that infrastructure meets both sets of requirements.

EU policy framework for sustainable urban mobility

The European Union has established a comprehensive and dynamic policy framework to support the transition towards sustainable, low-carbon and integrated urban mobility systems. SUMPs have become a central instrument within this framework, providing cities with a strategic and long-term approach to addressing transport challenges while improving quality of life, reducing emissions and increasing accessibility for all users. Since their introduction under the 2013 Urban Mobility Package, SUMPs have been progressively strengthened through key EU initiatives, including the European Green Deal, the Sustainable and Smart Mobility Strategy, the New EU Urban Mobility Framework and the Fit for 55 package, which collectively guide transport decarbonisation, modal shift and digitalisation.

In parallel, the EU has developed harmonised methodological guidelines to support implementation, particularly through the ELTIS platform (now the EU Urban Mobility Observatory) and the Guidelines for Developing and Implementing a Sustainable Urban Mobility Plan (3rd edition), ensuring a consistent, evidence-based and high-quality approach to sustainable urban mobility planning across Europe.

As part of the adaptation of European cities to contemporary environmental and infrastructure challenges, the European Commission's Directorate-General for Mobility and Transport (DG MOVE) published the third, updated edition of the Guidelines for Developing and Implementing a Sustainable Urban Mobility Plan on 11 June 2026. The main objective of this document is to ensure that all 431 urban nodes in the EU adopt and implement a SUMP by the end of 2027. This directly aligns local transport policies with the overarching objectives of the European Green Deal, the Sustainable and Smart Mobility Strategy and the New EU Urban Mobility Framework.

While retaining the proven core methodology, the new guidelines offer significantly greater practicality, clarity and alignment with contemporary trends. Their focus extends beyond city centres to include peri-urban and rural areas, urban logistics, advanced data management and the reduction of transport poverty through greater social inclusion.

What is an urban node?

Regulation (EU) 2024/1679 on the Trans-European Transport Network (TEN-T) identifies 431 cities along the TEN-T network which, due to their importance to the transport system, have been designated as urban nodes. These cities represent the starting or ending points of passenger and freight journeys on the TEN-T network, as well as locations where passengers transfer or goods are transported within or between different transport modes. They are important stops along international railway corridors and locations where railways and roads connect with seaports, airports and local urban mobility systems. This enables passengers to transfer easily to urban public transport, cycling infrastructure and pedestrian routes, while facilitating continuous and multimodal freight movements. As laid down by the Regulation, each urban node is required to adopt a SUMP by the end of 2027 as a long-term, comprehensive and integrated transport strategy covering the entire functional urban area, providing an effective framework for addressing urban mobility challenges.

Alongside the main document, specialised guides have also been published, providing more detailed guidance on specific aspects of urban mobility, such as the reference document on cycling and guidelines for Urban Vehicle Access Regulations (UVARs) – a set of measures restricting vehicle access to certain urban areas to reduce congestion and pollution and improve safety.

Key developments in the new SUMP guidelines

The updated 2026 framework transforms SUMPs from a recommended practice into a mandatory and powerful tool for achieving climate neutrality through several key innovations:

- **Full alignment with EU policies**: The guidelines are directly linked to recent European legislation and policy instruments, including the European Declaration on Cycling, the ITS Directive and the revised Alternative Fuels Infrastructure Regulation.
- **Legal requirement for urban nodes**: Under the TEN-T Regulation, adopting a SUMP by the end of 2027 becomes a legal obligation for 431 cities in the EU.
- **Practicality and simplicity**: The language of the document has been improved and concrete practical examples and useful links have been added, significantly facilitating its application and adaptation at the local level.

- **Broader spatial and logistics planning:** Planning is extended to peri-urban and rural areas, with the active involvement of stakeholders from the long-distance transport and urban logistics (freight transport) sectors.
- **Advanced data-driven planning:** A higher degree of integration of transport modelling, indicator monitoring and the use of mobility data spaces as shared data-exchange infrastructure is introduced.
- **Social sensitivity:** Particular emphasis is placed on transport accessibility for vulnerable groups and addressing transport poverty.
- **Supporting guides:** The package includes specific guidelines for developing cycling infrastructure and implementing UVAR measures, such as low-emission zones.

Implications for cities and quality of life

The most significant turning point introduced by the new guidelines is the transition from pilot projects to mandatory and concrete implementation. For cities and regions, this means an obligation to strengthen specific measures that directly affect citizens' quality of life, with an emphasis on three key pillars:

1. **Multimodal transport** – integrating different modes of transport into a single, functional system.
2. **Active mobility** – encouraging and expanding infrastructure for walking and cycling.
3. **Vehicle access regulation** – introducing low-emission zones and smart traffic flow management in urban centres.

The role of the TEN-T network

In recent years, the EU urban mobility policy framework has evolved from predominantly advisory guidelines towards more structured and binding requirements. This shift is most clearly reflected in **Regulation (EU) 2024/1679**, which elevates the role of urban nodes to that of key links between local, national and European transport systems. [1]

Under this Regulation, **urban nodes** are no longer treated merely as a planning concept, but as regulated entities with specific obligations. In particular, cities identified as urban nodes are required to adopt and implement SUMPs **by 2027** in accordance with additional specified requirements. These plans must include clear objectives, measures and performance indicators, while their implementation is subject to monitoring and reporting at the EU level. [1]

At the same time, Member States are assigned a strengthened role in facilitating this transition. **Member States are required to establish national SUMP frameworks**, including [1]:

1. **Designated national contact points,**
2. **Structured national SUMP programmes,**
3. **Systems for collecting data, monitoring and reporting on urban mobility indicators.**

This represents a significant step towards the institutionalisation of SUMP planning at the national level, moving from voluntary application towards a coordinated and accountable governance model.

The Regulation further strengthens key policy priorities by requiring urban nodes to ensure [1]:

1. **Multimodal integration, including the development of multimodal passenger hubs and freight terminals,**
2. **The introduction of zero- and low-emission mobility infrastructure solutions, in accordance with Regulation (EU) 2023/1804,**
3. **Efficient urban logistics and last-mile connectivity, while reducing congestion and emissions and improving the efficiency of the TEN-T network.**

By linking urban mobility planning with the fundamental requirements of TEN-T infrastructure and climate objectives, the Regulation effectively integrates local transport planning into the broader European framework of transport, energy and climate policies.

TEN-T network requirements

TEN-T infrastructure requirements have two complementary dimensions, as they simultaneously address users' needs and the strategic objectives of transport system development. Transport infrastructure users must be provided with efficiency, reliability and a high level of functionality, while sustainable transport modes need to be developed to reduce greenhouse gas emissions from transport and ensure resilience to future climate change. Digitalisation and multimodality must also be encouraged and improved. [1]

In addition, the European Commission has defined further requirements [1]:

	Rail speed	By 2040, passenger railway lines on the Core and Extended ore networks must allow trains to operate at speeds of 160 km/h or higher.
	European Rail Traffic Management System (ERTMS)	A common European signalling system will be implemented across the entire TEN-T network, improving railway safety and efficiency. National systems will be gradually phased out.
	Airport connectivity	Major airports with more than 12 million passengers annually must be connected to long-distance railway lines, making rail a competitive alternative to domestic short-haul flights.
	Freight terminals	The number and capacity of transhipment terminals will be expanded to meet transport needs. This includes accommodating trains 740 metres long, promoting a shift towards sustainable transport modes and strengthening the European combined transport sector.

	Urban mobility	All major cities along the TEN-T network will develop Sustainable Urban Mobility Plans to promote zero- and low-emission mobility.
	Alternative fuels	TEN-T provides the basis for deploying charging and refuelling stations for alternative fuels, such as hydrogen. It complements the requirements for alternative fuels infrastructure at urban nodes and terminals.

Table 1 presents the requirements defined by the European Commission that urban nodes must meet, together with the reference value for each requirement and the deadline by which it must be met.

Multimodal passenger terminals and the role of active mobility

The revision of the TEN-T Regulation explicitly emphasises the importance of integrating cycling with long-distance transport and recognises active mobility as a key solution for the first and last mile of passenger journeys. Under the Regulation, by 2030 all multimodal passenger hubs must be adapted to facilitate access through active mobility. [5]

To ensure seamless connectivity, the following elements must be implemented [5]:

Infrastructure connectivity: Major railway and bus stations, airports and ferry terminals must be directly connected to the cycling network of the urban node they serve.

Bicycle parking: When railway infrastructure is constructed or upgraded, secure bicycle parking facilities must be provided in appropriate numbers at major multimodal terminals and all smaller stations along the TEN-T network.

Expanding the catchment area: Providing direct and safe cycling routes from residential areas to stations significantly expands their catchment areas, thereby improving the efficiency of the railway network and public transport.

Safe integration: Whenever passenger transport infrastructure is constructed or upgraded, sustainable and safe integration with infrastructure intended for active modes of transport must be ensured.

TEN-T network – list of corridors and horizontal priorities

Nine European Transport Corridors and two additional network-wide horizontal priorities support the completion of the Trans-European Transport Network. European Coordinators have been appointed for individual TEN-T transport corridors and horizontal priorities, serving as key actors in coordinating the implementation and development of the network. [1]

European Transport Corridors form the backbone of the TEN-T core and extended core networks. They cross Europe from east to west and north to south along major transport axes.

Table 1 *TEN-T requirements for urban nodes*

PARAMETER DESCRIPTION	REFERENCE VALUE / REQUIREMENT	DEADLINE	REFERENCE TO THE TEN-T REGULATION
SUMP	SUMP adopted and in force	2027	41.2.i
National SUMP contact point	Contact point designated	2025	41.4
National support programme for sustainable urban mobility planning	Programme developed	2025	41.4
Multimodal freight terminal	At least 1 terminal	2040	40.1.d
Multimodal passenger hub	At least 1 hub	2030	40.1.c.c
Alternative fuels infrastructure	Infrastructure in place	2030	41.1.a

Source: [4][1]

The transport corridors extend beyond the EU to ensure connectivity with the Western Balkans, Switzerland, Norway, Ukraine and Moldova. Since 2024, eleven Rail Freight Corridors have been integrated into the European Transport Corridors to facilitate coordinated investment planning.

There are two horizontal priorities:

1. *European Rail Traffic Management System (ERTMS)*

2. European Maritime Space – refers to the integration and modernisation of maritime transport within the EU, with the aim of improving connections between seaports, strengthening intermodal links and enabling more efficient and sustainable use of maritime transport flows.

The European Union has defined nine European Transport Corridors, four of which extend through Croatia and the Western Balkan countries. The four corridors concerned are listed below, together with the corresponding annexes illustrating their geographical coverage.

Annex 1 presents the comprehensive TEN-T network, covering all European Union Member States as well as additional countries in the Western Balkans (Bosnia and Herzegovina, Serbia, Montenegro, Albania, Kosovo[1] and North Macedonia), Ukraine, Switzerland, Moldova and Norway.

Annex 2 →

Baltic Sea – Adriatic Sea Corridor

This corridor extends from the Baltic Sea towards the Adriatic Sea and passes through Poland, Czechia, Slovakia, Austria, Hungary, Slovenia, Croatia and Italy.

[1] 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.

Annex 3

Mediterranean Corridor

This corridor extends from east to west across southern Europe, passing through Ukraine, Hungary, Croatia, Slovenia, Italy, France and Spain.

Annex 4

Rhine–Danube Corridor

This corridor extends from Strasbourg and Frankfurt to the Black Sea, passing through France, Germany, Czechia, Austria, Slovakia, Hungary, Croatia, Serbia, Romania, Bulgaria and Ukraine.

Annex 5

Western Balkans – Eastern Mediterranean Corridor

This corridor extends from northern Austria to Cyprus, passing through Hungary, Slovenia, Italy, Croatia, Serbia, Bosnia and Herzegovina, Montenegro, Albania, Kosovo, North Macedonia, Bulgaria and Greece.

Urban Mobility Indicators (UMI)

Urban Mobility Indicators (UMI) are standardised tools developed by experts for the European Commission to measure progress in transforming urban transport. Their role is to help cities develop more sustainable and attractive mobility systems. Under the new TEN-T Regulation, all 431 urban nodes (cities) in the EU are required to collect these data to monitor the progress of their SUMPs in the areas of sustainability, safety and accessibility, while minimising the administrative burden on cities themselves. [6]

A total of seven key thematic areas have been identified, with dedicated factsheets (methodologies) developed for each [6]:

- Greenhouse gas (GHG) emissions
- Traffic congestion
- Road traffic crashes and injuries
- Modal share
- Access to mobility services
- Air pollution
- Noise pollution

Further information on Urban Mobility Indicators and the methodology for monitoring indicators in each thematic area is available at the following link: UMI.

TEN-T in the Republic of Croatia

The revision introduced by **Regulation (EU) 2024/1679** has significantly redefined the position of the Republic of Croatia within the Trans-European Transport Network (TEN-T), further integrating the national transport system into the European framework. Croatia is now included in four European Transport Corridors, further strengthening its role as a transport and logistics hub between Central and South-Eastern Europe. Compared with the previous framework, the new TEN-T network provides considerably better territorial coverage, particularly in Istria, Slavonia and Dalmatia, making Croatia one of the EU Member States with the largest proportional changes to its network.

Under the new structure, approximately 450 km of railway lines, around 430 km of road infrastructure, eight new ports and four new urban nodes have been added to the TEN-T network, further emphasising the focus on multimodality and transport system integration. This expansion directly increases the need for infrastructure modernisation, while simultaneously creating significant development opportunities to strengthen Croatia's position in logistics. In addition, a "Logistics Concept of the Republic of Croatia" is currently being developed to systematically define the locations of logistics and intermodal terminals at the national level. The aim is to establish a functional network of logistics centres that will enable more efficient management of freight flows and better integration into European supply chains. [7]

One of the key infrastructure projects is the construction of a lowland railway line between Zagreb and Rijeka, with a possible extension towards the island of Krk. This section will accommodate trains up to 750 metres long and significantly increase the capacity and competitiveness of rail freight transport. The project also involves demanding engineering works, including the construction of several long tunnels, further confirming its strategic importance. At the same time, the modernisation and construction of rail-road terminals and the reconstruction of the railway network are planned, particularly towards Slavonia and Dalmatia, with the aim of achieving more balanced spatial development of transport infrastructure. In this context, the development of the Port of Rijeka remains a key priority, given its role as the main maritime gateway to Central Europe and an important hub within the TEN-T network. [7]

The development of Croatia's transport system is aligned with the Transport Development Strategy of the Republic of Croatia 2017–2030, which defines the main directions for infrastructure modernisation and improvement. Particular emphasis is placed on strengthening the railway system, developing intermodal terminals and connecting ports, railways and the road network into an integrated logistics system. [8]

Urban nodes in the Republic of Croatia

In accordance with the new Regulation, five urban nodes in Croatia – Zagreb, Osijek, Rijeka, Split and Varaždin – are required to meet all the requirements defined by the European Commission, as presented in Table 2. This gives urban nodes a key role in integrating different transport modes, particularly in connecting rail and road transport and improving public transport and freight distribution in urban areas. Urban nodes thus become fundamental elements of the TEN-T system, where transport functions are concentrated and intermodality becomes a standard planning principle.

Table 2 presents the current status of urban nodes in Croatia in relation to the requirements defined by the European Commission.

Although the deadline for urban nodes to develop SUMPs is the end of 2027, only Split and Varaždin have completed this strategic document.

The City of Zagreb is in the process of developing its SUMP, while no information is currently available on progress in Osijek and Rijeka. In Croatia, the Ministry of the Sea, Transport and Infrastructure serves as the National SUMP Contact Point. A national SUMP programme has not been developed, although the deadline was 2025. Consequently, Split and Varaždin, which have developed SUMPs, have not received support or guidance from national authorities.

Each urban node must have at least one multimodal freight terminal and one multimodal passenger hub. Under **Regulation (EU) 2024/1679**, multimodal transport is defined as passenger or freight transport, or both, carried out using two or more modes of transport. Currently, Rijeka is the only urban node with multimodal freight terminals – Gateway and Brajdica – both of which combine rail, waterborne and road freight transport. [1]

According to the criteria established by **Regulation (EU) 2023/1804**, Zagreb, Rijeka, Split and Varaždin meet the requirement for the availability of alternative fuels infrastructure, as electric charging or liquefied petroleum gas (LPG) refuelling stations are available on the TEN-T road network or within 3 km of the nearest TEN-T network exit. According to currently available information, Croatia has no infrastructure for refuelling vehicles with hydrogen, ammonia or other types of alternative fuels. [9]

All SUMPs developed to date have resulted exclusively from local initiatives, without systematic national support in financial, organisational or strategic terms. The Republic of Croatia has a total of 556 local self-government units, comprising 128 cities and towns and 428 municipalities. Currently, 17 local self-government units (16 cities and towns and one municipality) have developed a SUMP. These are: Labin, Novalja, Novigrad, Zabok, Brdovec, Umag, Križevci, Koprivnica, Šibenik (master plan), Bjelovar, Dubrovnik, Varaždin, Sisak, Pula, Slavonski Brod, Zadar and Split.

Table 2 *Comparison of European Commission requirements for urban nodes and the current development status of urban nodes in the Republic of Croatia*

PARAMETER DESCRIPTION	ZAGREB	OSIJEK	RIJEKA	SPLIT	VARAŽDIN
SUMP developed	✗	✗	✗	✓	✓
At least one multimodal freight terminal	✗	✗	✓	✗	✗
At least one multimodal passenger hub	✗	✗	✗	✗	✗
Alternative fuels infrastructure[2]	✓	✗	✓	✓	✓

[2] Alternative fuels, as defined by the Directive, are fuels or energy sources that serve, at least partly, as substitutes for fossil oil sources in the energy supply to transport and have the potential to contribute to the decarbonisation of the transport system and improve the environmental performance of the transport sector. They include, among others, electricity, hydrogen, biofuels, synthetic and paraffinic fuels, natural gas (compressed natural gas – CNG and liquefied natural gas – LNG) and liquefied petroleum gas (LPG).

The absence of national coordination has negative consequences, primarily in terms of a lack of document standardisation, inconsistent plan quality and limited opportunities to monitor implementation and evaluate measures. There is no systematic information on whether planned measures are being implemented or to what extent objectives have been achieved, nor is there a consolidated framework for evaluating the impacts of SUMPs. [10]

At the national level, the lack of a clear legislative and institutional framework stands out as a key obstacle. This results in weaker standardisation of planning documents and insufficient pressure on local self-government units to improve their approach to urban mobility planning. Furthermore, the absence of a strong regulatory and financial framework limits support for cities willing to proactively develop SUMPs.

At the local level, key challenges include limited administrative capacity, a lack of professional expertise and insufficient motivation among decision-makers, partly due to the absence of clear national support.

Under such circumstances, SUMPs are often perceived not as strategic development tools but as administrative obligations associated with meeting formal requirements.

Even where a SUMP has been developed, its implementation and monitoring are often limited. Instead of serving as a fundamental document guiding the long-term development of urban mobility, a SUMP frequently becomes a static document without systematic implementation or continuous evaluation, significantly reducing its potential contribution to sustainable urban development.

TEN-T in the Western Balkans

The revision of the TEN-T framework through Regulation (EU) 2024/1679 has significantly changed the position of the Western Balkans within the European transport network. The most important development is the establishment of the Western Balkans – Eastern Mediterranean European Transport Corridor (WBEM), which, for the first time, brings together the six Transport Community partners (Albania, Bosnia and Herzegovina, Montenegro, Kosovo, North Macedonia and Serbia) and EU Member States within a single multimodal transport system. The corridor connects Central Europe with ports on the Adriatic and Eastern Mediterranean seas and represents a key infrastructure link between the region and the EU single market.

The new TEN-T structure also introduces the extended core network alongside the existing core and comprehensive networks, enabling infrastructure to be upgraded in phases. In the regional context, this means that TEN-T is no longer solely about constructing individual road sections and railway lines, but is increasingly becoming a framework for coordinating infrastructure investments, cross-border connectivity, multimodality, digitalisation, climate resilience and sustainable urban mobility.

According to the Transport Community's 2025 Annual TEN-T Report [11], the Western Balkans – Eastern Mediterranean Corridor comprises approximately 5,750 km of roads, 6,201 km of railway lines, 20 seaports, 14 airports, 14 intermodal terminals and 25 urban nodes. Its development therefore has the potential to transform the way transport investments are planned and prioritised in the region, particularly given the need for better connections between railways, ports, terminals and urban areas.

At the same time, the condition of infrastructure across the region is highly uneven. Long-standing underinvestment in maintenance and modernisation is particularly evident in the railway sector, while most funding continues to be directed towards road construction. Consequently, the Transport Community and the European Commission increasingly emphasise in their annual reports the need to redirect regional investments towards railways, multimodality, digitalisation and infrastructure resilience, while simultaneously improving the quality and safety of the existing network.

TEN-T in Montenegro

Montenegro plays a particularly important role in the new TEN-T structure due to the combination of the Port of Bar, the Bar–Vrbnica railway line and the Bar–Boljare road corridor. This infrastructure connects the Adriatic Sea with Serbia and the wider markets of Central and South-Eastern Europe. Following the revision of the TEN-T network, the Bar–Podgorica–Vrbnica railway line was incorporated into the Western Balkans – Eastern Mediterranean European Transport Corridor (WBEM), further confirming its strategic importance.

A key priority is the development of the Bar–Podgorica–Vrbnica multimodal corridor, which should integrate maritime, rail and road transport. The modernisation of the Bar–Vrbnica railway line is particularly important.

According to Transport Community data, projects supported through EU instruments cover approximately 168 km of railway, with total estimated investments of around EUR 405 million, including the reconstruction of bridges and tunnels, rehabilitation of critical sections, modernisation of signalling systems and reconstruction of the Bar–Golubovci section. [11]

On the road network, the main development project is the continuation of the Bar–Boljare motorway, which forms part of the WBEM Corridor. Preparatory works on the Mateševo–Andrijevica section began in 2026, while at the time of drafting this document, a tender procedure was underway for the Smokovac–Tološi section, which forms part of the planned northern bypass around Podgorica. The Adriatic-Ionian Corridor is also planned through Montenegro as an extension of the TEN-T core network, stretching approximately 127 kilometres from the border with Bosnia and Herzegovina to the border with Albania.

For Montenegro, it is particularly important that these two investment directions (railways and roads) are not considered separately.

Furthermore, the TEN-T framework provides an opportunity for the Port of Bar to develop into a regional intermodal logistics centre, although this requires simultaneous improvements to port infrastructure, railways, terminals, access roads and logistics services.

The current national framework is provided by the Transport Development Strategy of Montenegro 2019-2035, which is being updated to strategically steer development towards sustainable mobility and establish a new implementation framework.

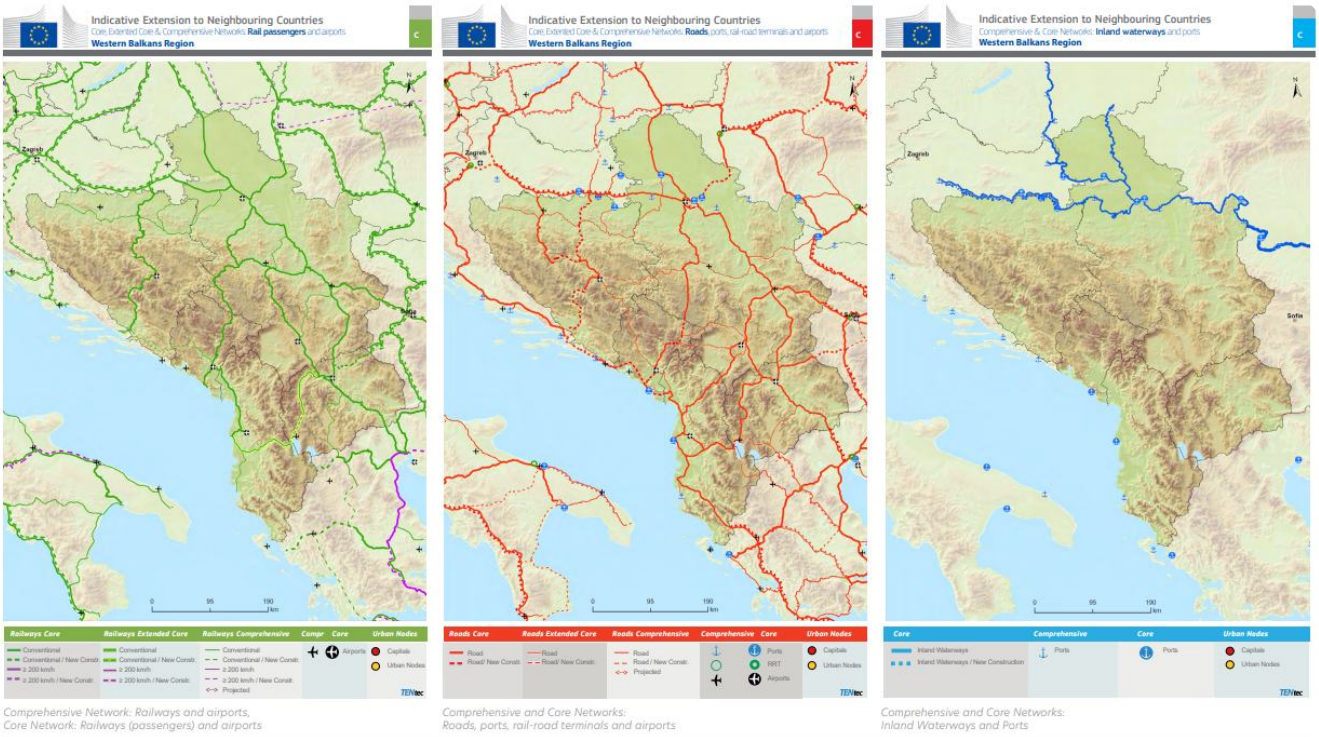


Figure 1 *Indicative extension of the TEN-T comprehensive and core networks to the Western Balkans*

TEN-T in Bosnia and Herzegovina

Bosnia and Herzegovina occupies one of the most important positions in the Western Balkans TEN-T network thanks to Corridor Vc, which connects Hungary and Croatia with central Bosnia and Herzegovina and the Port of Ploče. Following the revision of the TEN-T network, Corridor Vc has become an integral part of the new WBEM Corridor, further increasing its importance in the European context.

The development of the TEN-T network in Bosnia and Herzegovina is predominantly focused on completing Corridor Vc, particularly through the construction of the remaining motorway sections between the northern border with Croatia, Doboj, Sarajevo and Mostar.

Although road infrastructure is the dominant component of the investment cycle, the long-term competitiveness of Corridor Vc also depends on railway infrastructure development and high-quality connections with the Port of Ploče. In this respect, TEN-T should be viewed as a multimodal corridor rather than merely a motorway construction project. This requires simultaneous improvements to railways, intermodal terminals, border crossings and logistics capacities.

A particular institutional challenge arises from the fact that transport infrastructure management in Bosnia and Herzegovina is divided among different levels of government. Effective implementation of TEN-T projects therefore requires stronger coordination between the state level, entities, infrastructure managers and local authorities, particularly for projects crossing administrative boundaries.

TEN-T in Serbia

Serbia has the most complex TEN-T position among the Western Balkan countries. Its territory is crossed by two European Transport Corridors – WBEM and Rhine–Danube – making the country a key connection point between Central Europe and the southern and south-eastern parts of the continent. WBEM includes, among other routes, Corridor X through Serbia, while Rhine–Danube includes sections towards Vršac and the Hungarian border, as well as the inland waterways of the Danube, Sava and Tisa rivers.

Due to its geographical position, Serbia has the potential to become one of the region's most important intermodal logistics hubs. Belgrade, Novi Sad and Niš are particularly significant, as are connections with Hungary, Croatia, Romania, Bulgaria, North Macedonia and Montenegro.

Investment in road infrastructure is very substantial. The latest Transport Community TEN-T report identifies three active projects with a total value of approximately EUR 3.2 billion, including the Niš–Pločnik, Novi Sad–Ruma and Požega–Duga Poljana sections, alongside other projects under preparation. [11]

However, Serbia's long-term TEN-T competitiveness largely depends on railway infrastructure. Modernisation of the Belgrade–Niš–Dimitrovgrad route, continued development of the connection towards the Hungarian border and improvements to Corridor X are essential for increasing the share of rail in international freight transport.

Serbia is also the only Western Balkan country whose TEN-T network includes a significant inland waterway component, primarily the Danube, Sava and Tisa rivers. This creates additional potential for developing intermodal transport and connecting river ports with railway and road infrastructure.

For Serbia, therefore, the key question is how to transform its existing transit advantage into a functional multimodal and logistics advantage. This involves not only constructing new roads but also modernising railways, developing freight terminals, improving border crossing efficiency, digitalising transport processes and strengthening connections between ports and logistics centres.

TEN-T in Kosovo

Following the revision of the TEN-T framework, Kosovo has been included in the WBEM Corridor, which represents its only core TEN-T corridor connection. The corridor runs through Kosovo in a north–south direction along Rail Route 10, which is of key importance for connecting Kosovo with Skopje, Niš and the wider European transport system.

The most important TEN-T priority remains the modernisation of Rail Route 10, including sections between Fushë Kosovë/ Kosovo Polje, Mitrovica and the border with North Macedonia. The project is of regional importance because it represents a direct railway connection between Serbia, Kosovo and North Macedonia. However, progress has been uneven, particularly regarding signalling, telecommunications and certain remaining sections.

On the road network, important routes include Pristina–Skopje, Pristina–Niš and Pristina–Tirana, while projects on the Pristina–Merdare section remain important for connectivity with Serbia and regional trade. The Transport Community and the European Commission have highlighted slow progress on certain projects, particularly due to financial, institutional and preparatory challenges. [11]

Kosovo has adopted the Multimodal Transport Strategy 2023-2030, which emphasises infrastructure modernisation, improved governance, safety, environmental protection and digitalisation of the transport sector.

TEN-T in Albania

Albania is one of the countries where the new TEN-T structure offers particularly strong development potential. Corridor VIII, comprising both railway and road routes as part of the WBEM Corridor, connects the Albanian coast and ports with North Macedonia and onwards to Bulgaria, while a significant part of the Adriatic–Ionian Corridor has also been integrated into the TEN-T core network. This gives Albania a strategic position between Adriatic ports, the Balkan hinterland and Central European markets.

According to the Transport Community's 2025 Annual Report, Albania is currently implementing seven TEN-T projects on the core network, covering approximately 218.5 km and worth around EUR 2.22 billion. The most significant projects include the Tirana bypass, the expansion of the Tirana–Durrës motorway and several sections of the Adriatic–Ionian Corridor. [11]

Particular emphasis is placed on railway development. The ongoing modernisation and electrification of the Durrës–Rrogozhinë section and its further connection towards Tirana, including the airport connection, are strategically important for the development of multimodal transport. In the long term, the objective is to establish a functional connection between the ports of Durrës and Vlorë, the railway network, urban centres and neighbouring countries.

The new National Transport Sector Strategy until 2030 further emphasises modernisation of the TEN-T core and comprehensive networks, development of multimodal corridors, digitalisation, alternative fuels, climate resilience and the preparation of SUMPs in larger cities.

TEN-T in North Macedonia

North Macedonia has a particularly important transit function within the regional TEN-T network. Under the new framework, WBEM is the only European Transport Corridor passing through the country, with key routes linked to the historical Corridors VIII and X. This makes North Macedonia one of the most important land connections between Adriatic ports, Serbia, Bulgaria and Greece.

The road network is undergoing a period of significant investment. According to the Transport Community's 2025 Annual Report, six TEN-T projects are currently being implemented in North Macedonia, with a total value of approximately EUR 2.3 billion, of which around EUR 1.8 billion relates to the core network. The projects cover approximately 189.7 km of road infrastructure at various stages of implementation. [11]

Corridor VIII is of particular strategic importance, specifically the Skopje–Kičevo–Ohrid–Struga–Albanian border route, which connects North Macedonia with Albanian ports and the Adriatic. The Transport Community states that the Durrës–Rrogozhinë–Kičevo–Skopje section, with a total length of approximately 386 km, has been included in the extended core network under the new TEN-T structure, with a completion deadline of 2040. [11]

The railway component remains equally important. Modernisation of the sections towards Serbia and Bulgaria, including Kumanovo–Beljakovce–Kriva Palanka–Deve Bair, is essential for realising the full potential of Corridors VIII and X. The Transport Community particularly emphasises the need for infrastructure investments to be accompanied by railway sector reforms, interoperability and the introduction of ERTMS. [11]

Urban nodes in the Western Balkans

One of the important developments introduced by the revised TEN-T framework is the stronger integration of cities into the planning of the European transport network. Urban nodes are no longer regarded merely as locations through which transport infrastructure passes, but as key points where different transport modes, passenger and freight flows, public transport and the so-called first and last mile are integrated.

For the Western Balkan countries, this change is particularly significant because TEN-T requirements are becoming directly relevant to national and local authorities, including in terms of access to EU funding. Under the new framework, urban nodes must develop SUMPs for their functional urban areas, provide multimodal and intermodal terminals and report to the European Commission on data relevant to urban mobility. The deadline for adopting SUMPs in urban nodes is 2027, while the establishment of multimodal passenger and freight hubs is expected by 2030.

Furthermore, in 2026, the Transport Community developed the regional Policy Framework and Roadmap for Integrated Sustainable Urban Mobility for the Western Balkans, which envisages the establishment of National SUMP Support Programmes (NSSPs). The objective is to move from a fragmented, project-based approach towards a systematic and integrated model of national support for sustainable urban mobility development, encompassing institutional coordination, financing, technical capacities, implementation monitoring and alignment with European regulations. [4]

In this respect, the new TEN-T policy creates opportunities for much stronger links between national transport policies and local urban mobility planning. For Western Balkan cities, this represents an opportunity to improve accessibility, reduce car dependency and enhance the quality of urban spaces through better planning of public transport, intermodal hubs, active transport modes and digital solutions.

In the coming period, the European Commission is expected to officially include selected Western Balkan cities in the list of urban nodes.

Recommendations

In line with the TEN-T Regulation, a stronger national framework needs to be established to enable cities to effectively prepare, implement and monitor sustainable mobility measures. Therefore, several recommendations for relevant local and national authorities are presented below.

1 Establishing a national contact point

Establishing a National SUMP Contact Point is of crucial importance, as it is one of the main requirements set by the European Commission. Once established, the National Contact Point should set up a national working group for the development and implementation of national SUMP guidelines, involving representatives of relevant ministries, regional and local governments, expert institutions, the transport and spatial planning sectors, academia and civil society organisations. Such a working group would enable a coordinated approach to implementing TEN-T requirements and aligning national policies with the European legislative framework.

At the same time, continuous interdepartmental coordination among competent authorities within functional urban areas must be ensured, as the TEN-T Regulation specifically emphasises the importance of integrated mobility management at the level of urban nodes and their surrounding catchment areas.

2 Developing a national SUMP programme

To ensure a harmonised methodology for developing SUMPs and enable their comparison, monitoring and evaluation, it is essential to establish a national SUMP programme. This is one of the main requirements for all EU Member States and associated countries. Therefore, considerable emphasis must be placed on developing a National SUMP Programme, both to meet the requirements set out by the European Commission and to ensure that all future SUMPs are prepared to a high professional, strategic and technical standard, that their implementation is feasible and that they contribute to the strategic development objectives of the European Union.

Particular attention should be paid to aligning SUMPs with other strategic and planning documents, including spatial plans, Sustainable Energy and Climate Action Plans (SECAPs), Sustainable Urban Logistics Plans and other relevant development strategies. Integrating these documents is essential for achieving climate objectives, ensuring more efficient use of public funds and improving infrastructure investment planning within the TEN-T network.

3 Functional urban areas and transport poverty

The national approach to developing and implementing SUMPs should be based on functional urban areas, incorporating suburban and rural areas connected to cities through daily commuting patterns. This would ensure more effective mobility planning, better integration of different transport systems and reduced transport-related and environmental pressures.

According to the new, third edition of the Guidelines for Developing and Implementing SUMPs, one of the key developments is the particular emphasis placed on including peri-urban and rural areas, which have previously been neglected despite their considerable strategic importance.

Special attention is also given to social inclusion and addressing transport poverty.

4 Capacity building and technical support

Cities and other competent authorities should be provided with systematic technical assistance and expert support throughout all stages of SUMP development and implementation. In addition, national training and capacity-building programmes should be developed for representatives of local and regional authorities and other stakeholders involved in implementing sustainable mobility measures.

To enable cities to implement SUMPs effectively, financial support must also be provided for recruiting and retaining qualified administrative staff and engaging external experts, particularly in smaller cities with limited resources.

5 Knowledge exchange and communication

Networking, peer learning and exchange of experiences among cities and regions, including remote, island and sparsely populated areas, should be systematically encouraged to ensure that successful solutions can be transferred and disparities in capacities between different areas are reduced. Furthermore, awareness of existing European tools, guidelines and resources should be increased.

In addition to expert support, communication campaigns should be organised and coordinated to promote sustainable mobility, improve understanding of the benefits of sustainable mobility measures and strengthen the participation of citizens and local stakeholders in planning processes.

6 Quality monitoring and data management

To ensure the effective implementation of SUMPs, the quality of their preparation, implementation and evaluation should be improved through the development of clear methodologies, quality standards and national monitoring mechanisms.

It is also important to regularly review national regulatory and institutional frameworks to remove administrative and legislative barriers to the development of effective sustainable mobility plans, particularly in the context of the requirements of the TEN-T Regulation.

Particular emphasis should be placed on developing systems for monitoring sustainable urban mobility indicators, including enabling the collection, exchange and use of relevant national, regional and private-sector data. High-quality data are essential for measuring progress towards sustainable mobility objectives, climate neutrality and reduced transport emissions, as well as for ensuring compliance with European reporting requirements under the TEN-T framework.

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ANNEXES 1–5

Maps of the TEN-T network and European Transport Corridors

Source: European Commission, TENtec – Map Finder Chart for European Transport Corridors

1 Comprehensive TEN-T network and European Transport Corridors p. 22

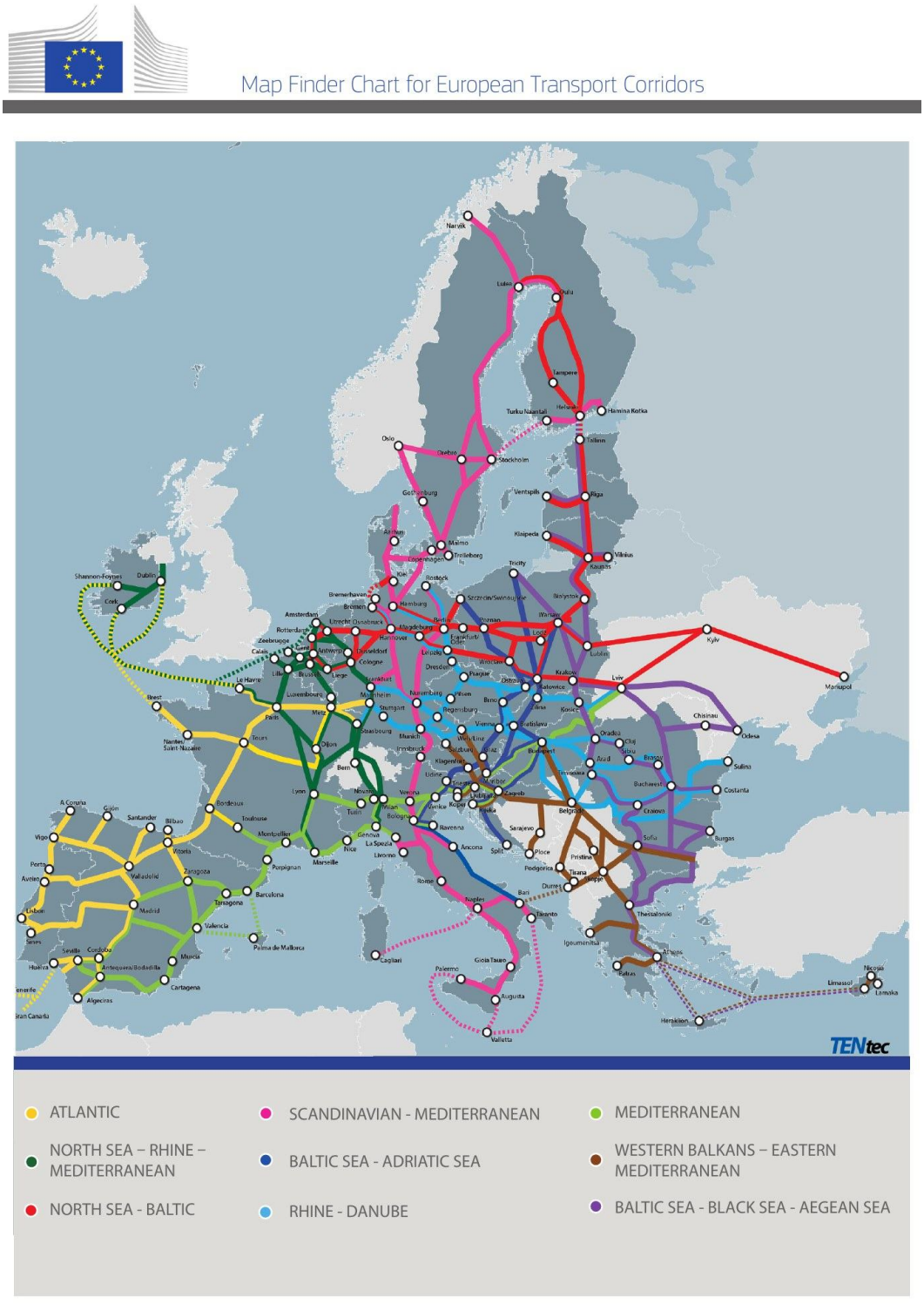
2 Baltic Sea – Adriatic Sea Corridor p. 23

3 Mediterranean Corridor p. 26

4 Rhine–Danube Corridor p. 29

5 Western Balkans – Eastern Mediterranean Corridor p. 32

Annex 1 Comprehensive TEN-T network and European Transport Corridors



The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 2

Baltic Sea – Adriatic Sea Corridor

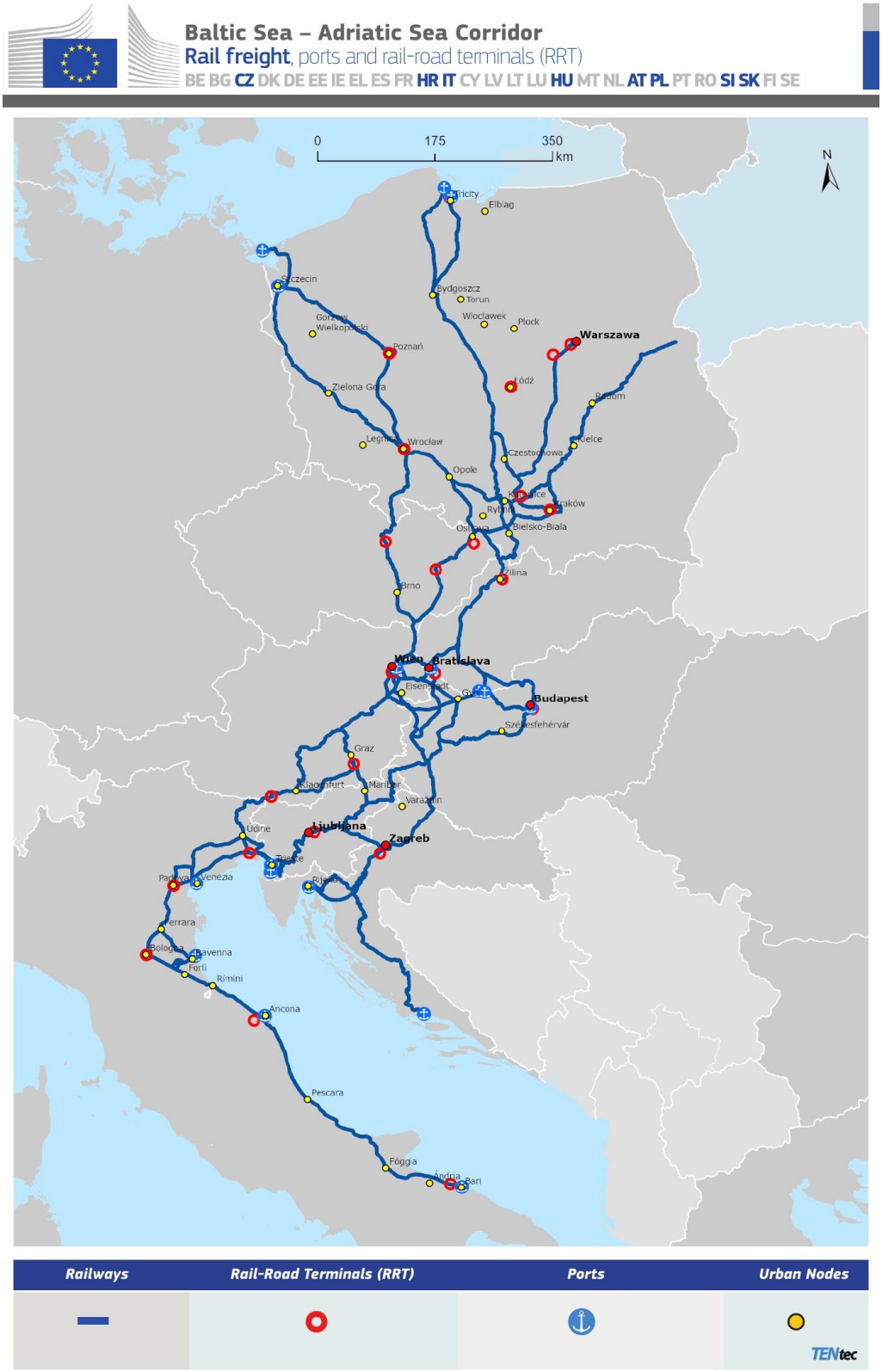
Inland waterways and roads · 1/3



Annex 2

Baltic Sea – Adriatic Sea Corridor

Rail freight · 2/3



Annex 2

Baltic Sea – Adriatic Sea Corridor

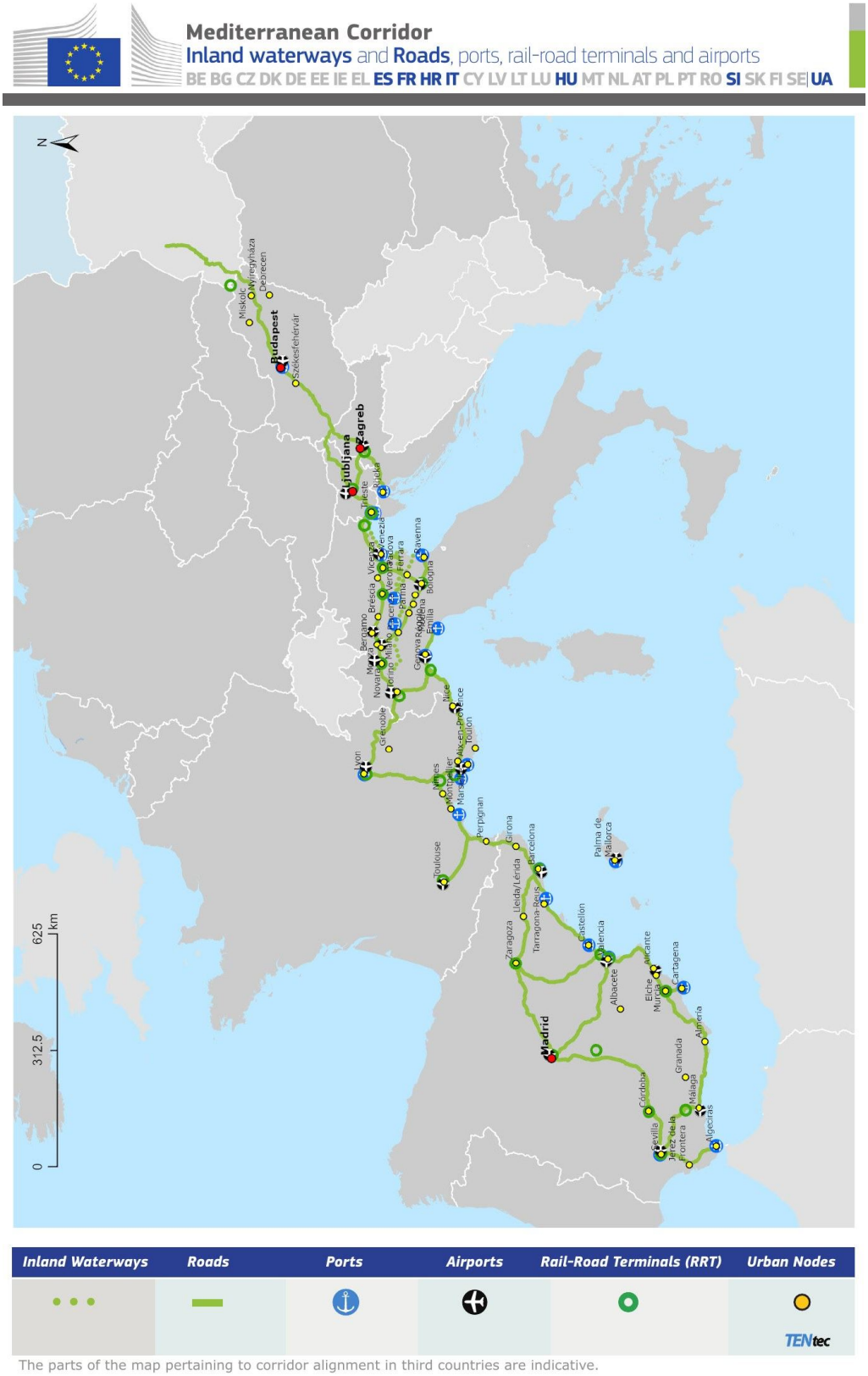
Rail passenger transport · 3/3



Annex 3

Mediterranean Corridor

Inland waterways and roads · 1/3

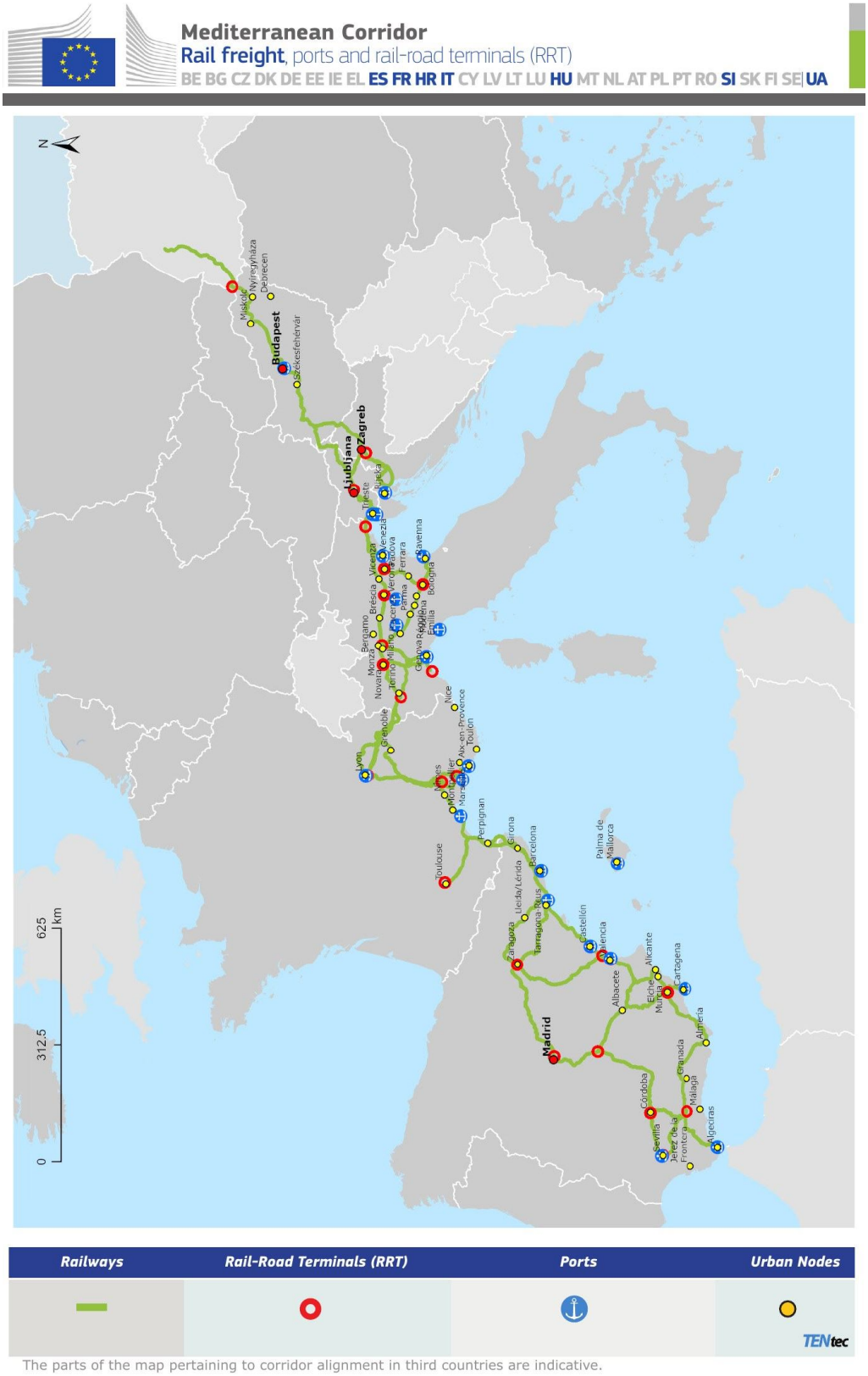


The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 3

Mediterranean Corridor

Rail freight · 2/3

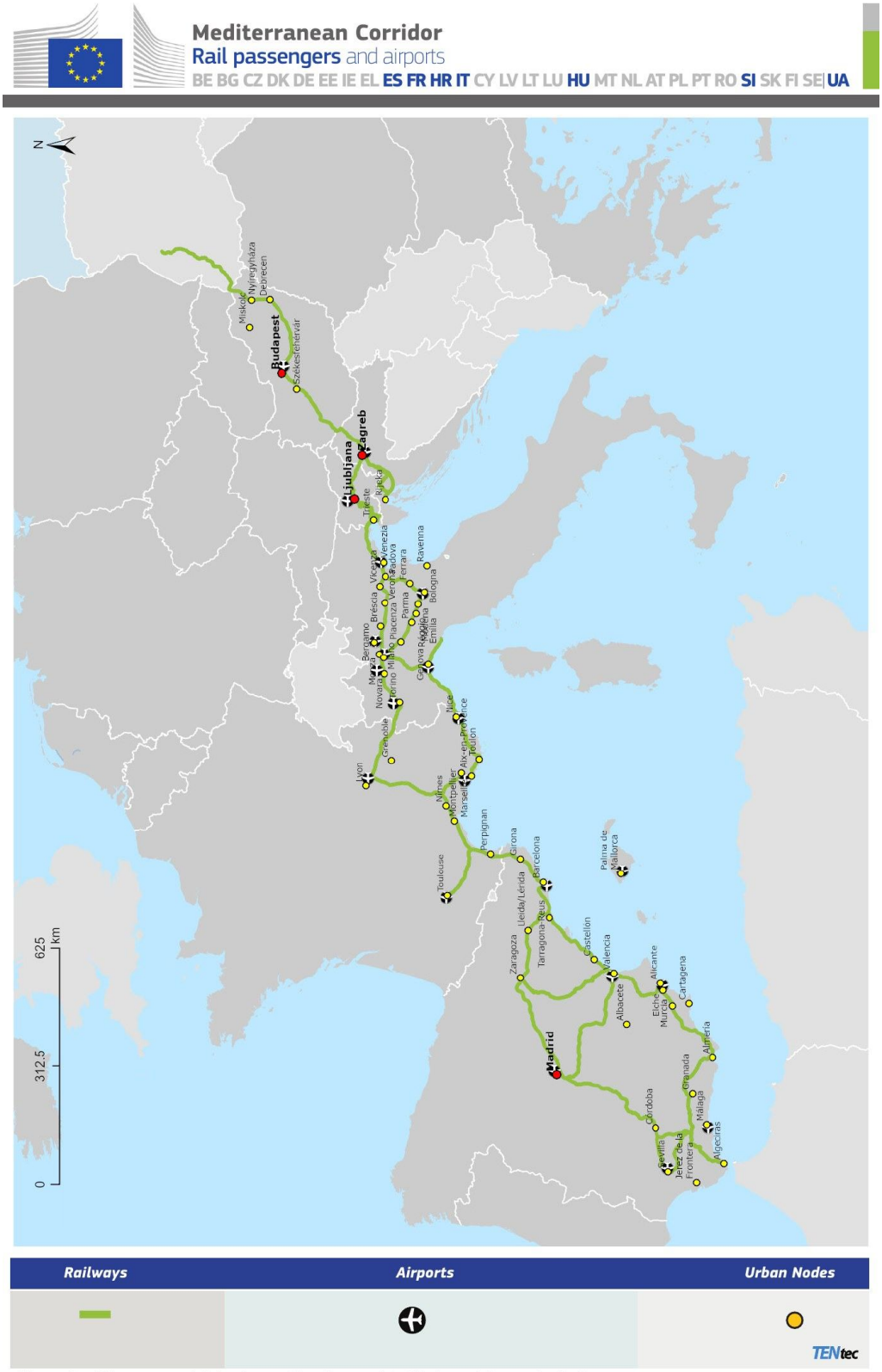


The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 3

Mediterranean Corridor

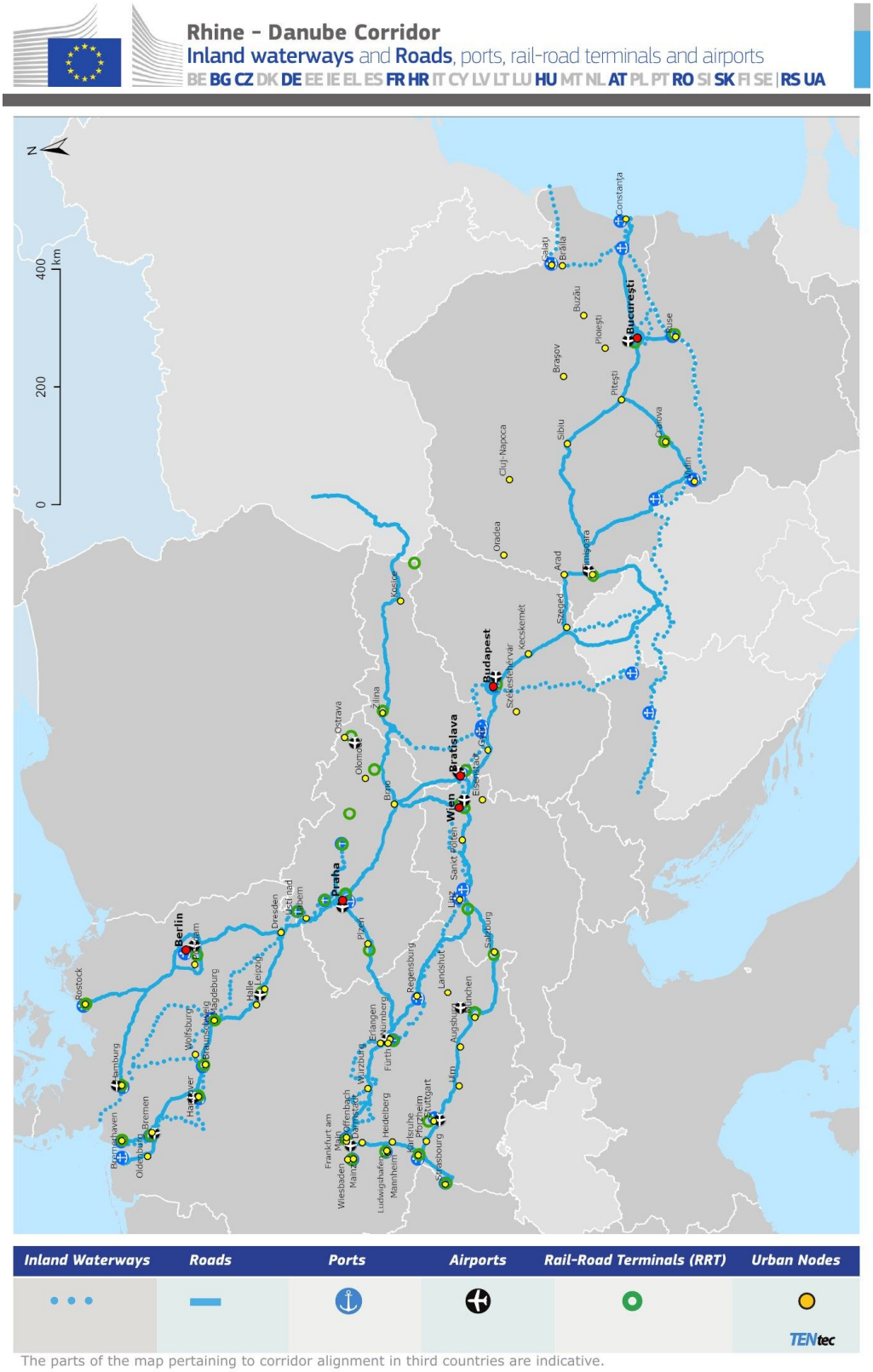
Rail passenger transport · 3/3



The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 4 Rhine–Danube Corridor

Inland waterways and roads · 1/3

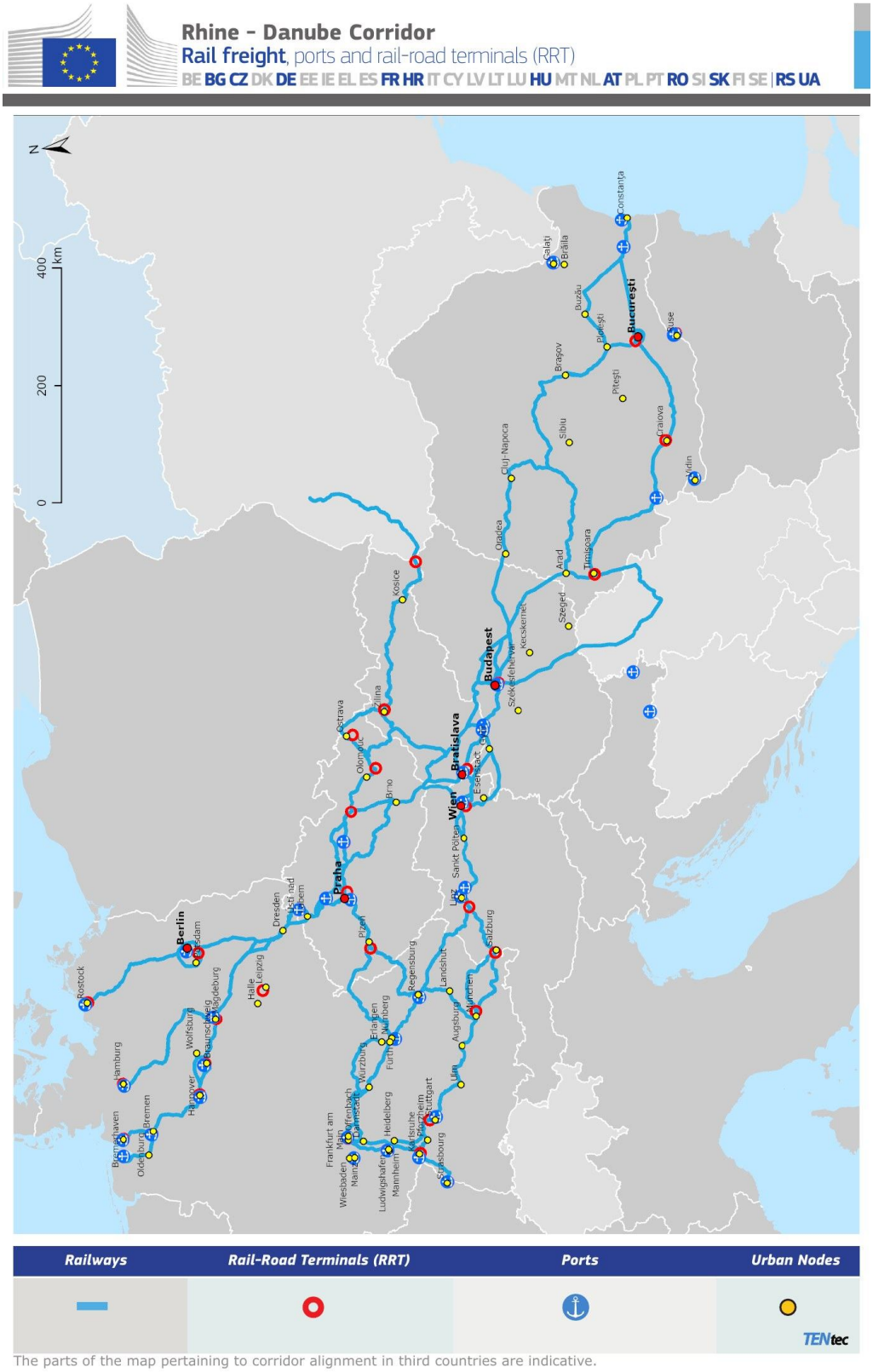


The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 4

Rhine–Danube Corridor

Rail freight · 2/3

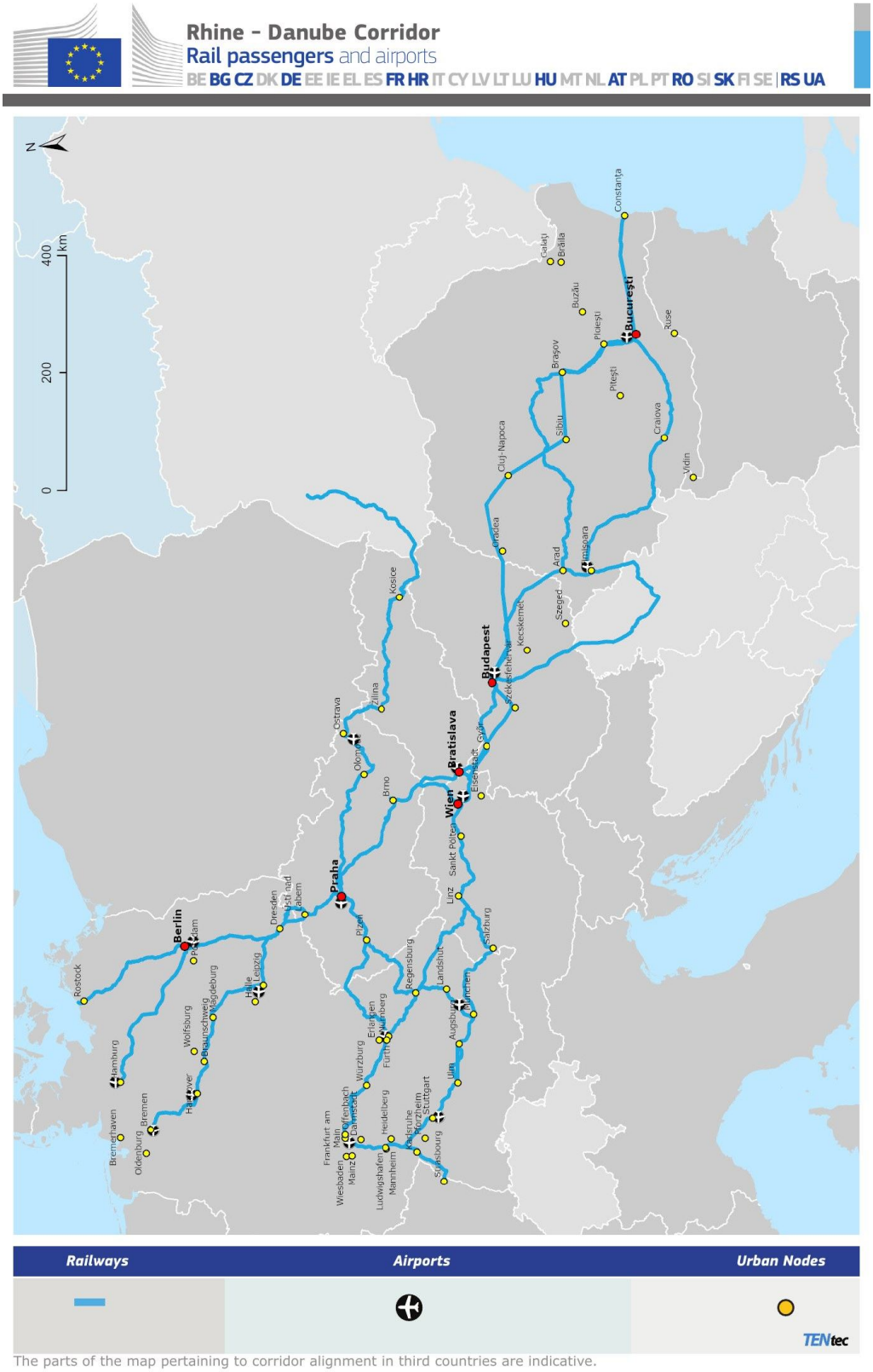


The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 4

Rhine–Danube Corridor

Rail passenger transport · 3/3



The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 5 Western Balkans – Eastern Mediterranean Corridor

Inland waterways and roads · 1/3



The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 5

Western Balkans – Eastern Mediterranean Corridor

Rail freight · 2/3



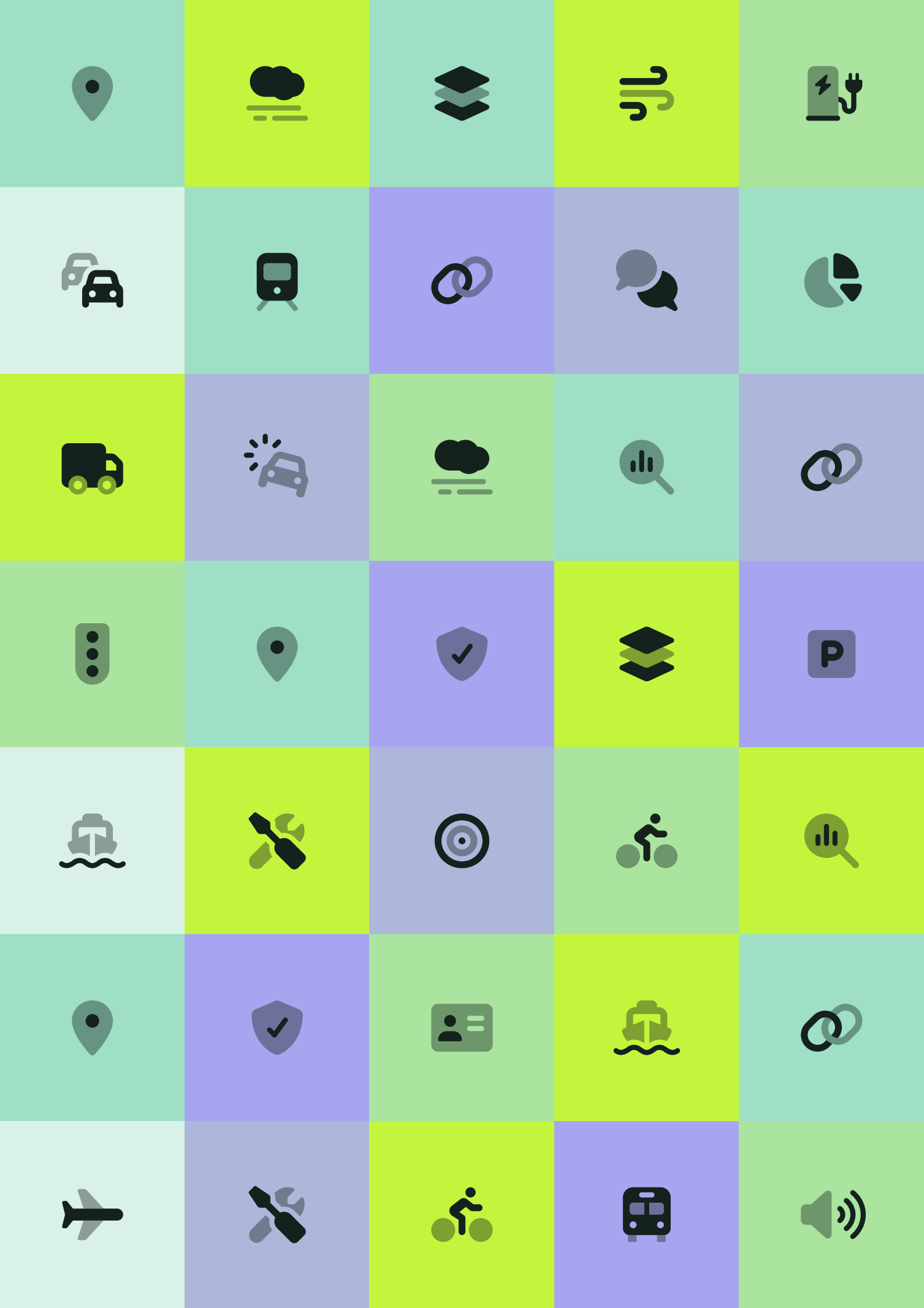
The parts of the map pertaining to corridor alignment in third countries are indicative.

Annex 5 Western Balkans – Eastern Mediterranean Corridor

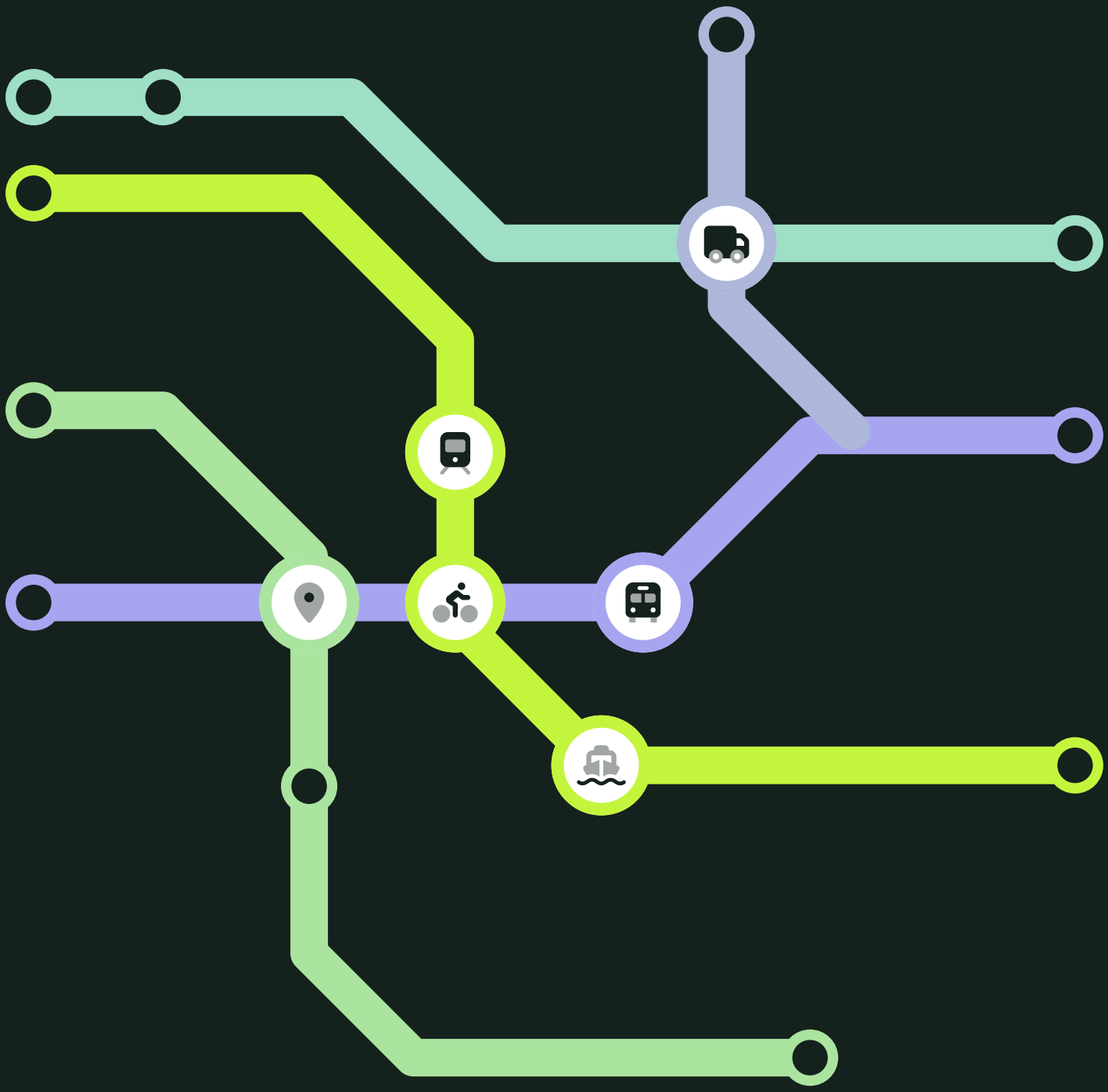
Rail passenger transport · 3/3



The parts of the map pertaining to corridor alignment in third countries are indicative.



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