



URBAN TRANSPORT CV19 PROJECT

Impact on the use of public transport due to the C19 pandemic in the Western Balkans

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About the Study

Period: March-July 2021

Study objectives:

- Assess the impacts of the pandemic on public transport operations
- Identify practical measures to help reduce H&S risks to vulnerable passengers and road users



Methodology (Phase 1 - Data gathering)

Literature review

- Were any similar studies on H&S risks in public transport undertaken?

Media search

- What key topics were reported in the media on the impact of the pandemic on use of public transport?

Stakeholder mapping

- Who are the key stakeholders?



Methodology (Phase 2 – Surveys and interviews)

Survey of public transport operators

- How has the pandemic affected business operations and provision of services?
- What are the H&S impacts on workers and passengers?

Survey of road safety & public health NGOs

- What behavioural changes were noticed in use of public transport and other mobility types?

Survey of users of the public transport system

- What are passengers' sentiments related to use of public transport during the C19 pandemic?

Interviews

- What are the opinions of organisations in the fields of public transport, traffic safety and public health on impacts of the pandemic on public transport?



Albania (Tirana)

Public transport system in Tirana

- > Buses only
- > 16 urban and 25 suburban bus lines
- > 10 private bus operators
- > Coordination by city authorities



Population: approx.
800,000



Impacts of the pandemic on public transport services in Tirana

- › Services in Tirana initially suspended for 4 months
- › Measures introduced (capacity restriction, social distancing, etc.)
- › Decline in the number of passengers using public transport (50-60%)
- › Number of bus lines reduced (25-60%)



Impacts of the pandemic on public transport operators in Tirana

- › Significant financial consequences – decrease in revenues (40-60%)
- › Reduction in earnings of employees
- › Most operators in Tirana unable to make additional investments



Changes in mobility patterns in Tirana



Before the pandemic

Public transport was the most frequently used type of transport



During the pandemic

Private cars were the most preferred mode, followed by walking

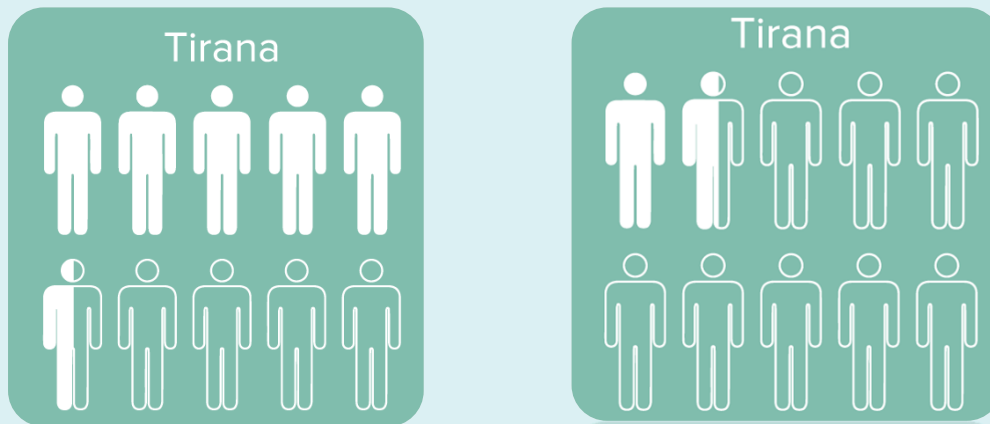
Public transport fell to the 3rd place

Use of bicycles/scooters increased slightly



Changes in mobility patterns in Tirana

Percentage of frequent users of public transport dropped by almost three times

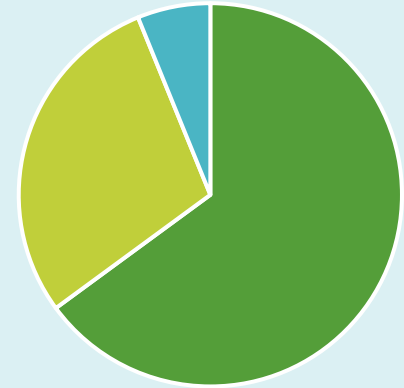


Only 1/3 of users will continue to use public transport the same way after the pandemic



Safety in public transport in Tirana

- > No specific actions taken to protect the H&S of vulnerable people in public transport
- > Users are generally not satisfied with the level of information received or the way public transport authorities responded to the challenges of the pandemic



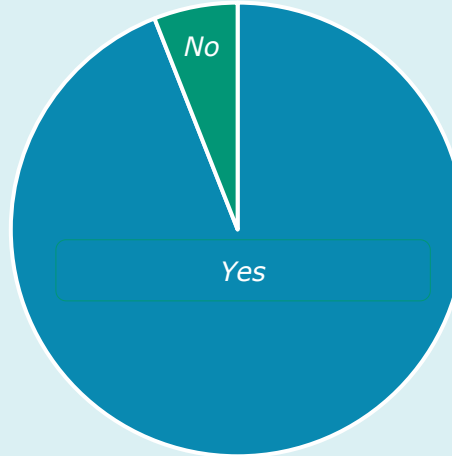
■ No ■ Partially ■ Yes

Do you feel safe in public transport?



Safety in public transport in Tirana

Responses to the question whether passenger protection measures need to be improved



Bosnia and Herzegovina (Sarajevo and Banja Luka)

Public transport system in Sarajevo and Banja Luka

Sarajevo: tram, trolley, bus/minibus

- › 1 public operator for all types of transport
- › 1 private operator for bus/minibus
- › Coordination by Ministry of Traffic

Banja Luka: bus only

- › Private operators
- › Coordination by city authorities



Population Sarajevo:
approx. 400,000

Population Banja Luka:
approx. 200,000



Impacts of the pandemic on public transport services in Sarajevo and Banja Luka

- › Services initially suspended
- › Measures introduced (capacity restriction, social distancing, etc.)
- › Decline in the number of passengers using public transport (up to 50%)
- › Number of lines reduced



Impacts of the pandemic on public transport operators in Sarajevo and Banja Luka

- › Significant financial consequences – decrease in revenues (up to 80%)
- › Reduction in earnings of employees by private operators (10-15%)
- › All operators unable to make additional investments



Changes in mobility patterns in Sarajevo and Banja Luka



Before the pandemic

Public transport was the most frequently used type of transport



During the pandemic

Private cars were the most preferred mode

Public transport fell to the 2nd place, followed by walking

Use of bicycles/scooters increased slightly



Changes in mobility patterns in Sarajevo and Banja Luka

Percentage of frequent users of public transport dropped by 4 times

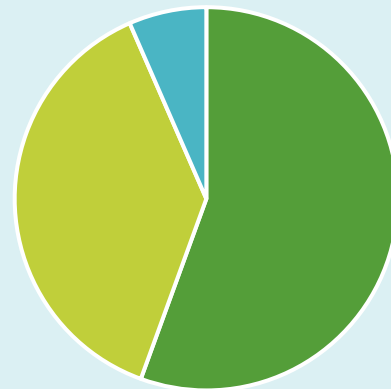


Only 1/2 of users will continue to use public transport the same way after the pandemic



Safety in public transport in Sarajevo and Banja Luka

- > No specific actions taken to protect the H&S of vulnerable people in public transport
- > Users are generally not satisfied with the level of information received or the way public transport authorities responded to the challenges of the pandemic



■ No ■ Partially ■ Yes

Do you feel safe in public transport?



Safety in public transport in Sarajevo and Banja Luka

Responses to the question whether passenger protection measures need to be improved



Prishtina (Kosovo)

Public transport system in Prishtina

- Buses only
- Main public transport provider is a municipal company
- 11 smaller private operators



Population: approx.
200,000



Impacts of the pandemic on public transport services in Prishtina

- › Services in Prishtina initially shut down
- › Measures introduced (capacity restriction, social distancing, etc.)
- › Decline in the number of passengers using public transport and significant reduction in number of bus lines



Impacts of the pandemic on public transport operators in Prishtina

- › Significant financial consequences – decrease in revenues (50-70%)
- › Reduction in earnings of employees for some operators (20-60%)
- › All operators in Prishtina unable to make additional investments



Changes in mobility patterns in Prishtina



Before the pandemic

Public transport was the most frequently used type of transport



During the pandemic

Private cars were the most preferred mode

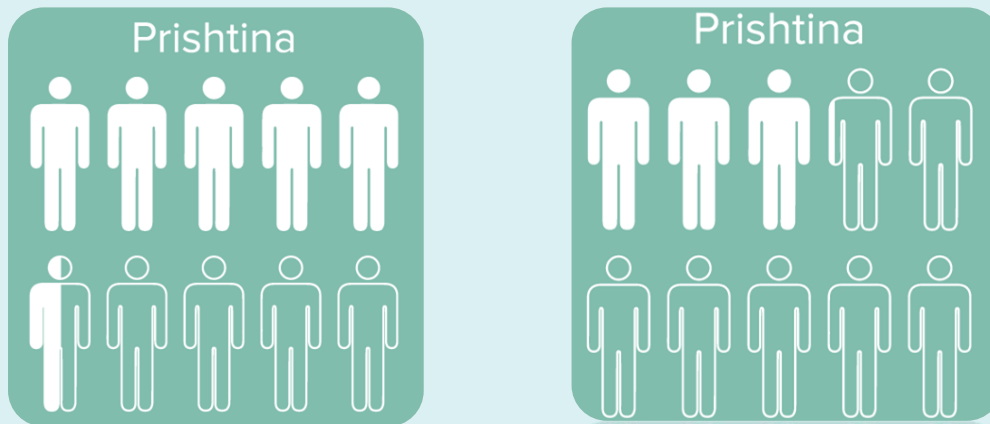
Public transport fell to the 2nd place

Use of bicycles/scooters increased slightly



Changes in mobility patterns in Prishtina

Percentage of frequent users of public transport dropped by two times

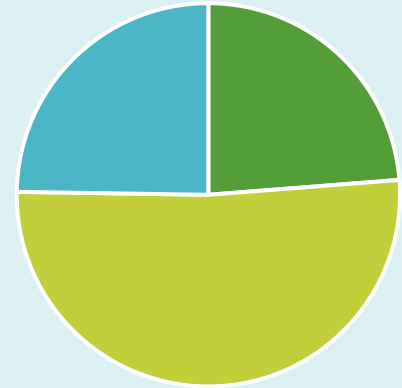


Only 1/3 of users will continue to use public transport the same way after the pandemic



Safety in public transport in Prishtina

- > No specific actions taken to protect the H&S of vulnerable people in public transport
- > Users are generally not satisfied with the level of information received or the way public transport authorities responded to the challenges of the pandemic



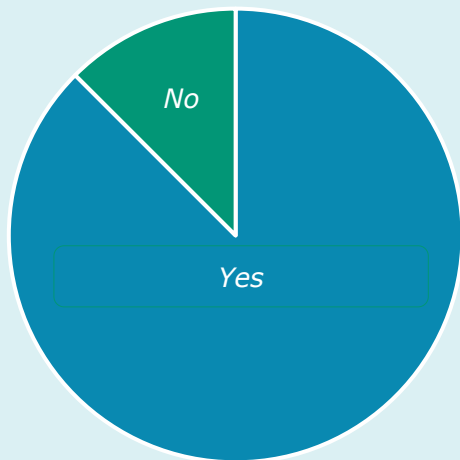
■ No ■ Partially ■ Yes

Do you feel safe in public transport?



Safety in public transport in Prishtina

Responses to the question whether passenger protection measures need to be improved



Skopje

(North Macedonia)

Public transport system in Skopje

- › Buses only
- › The main public transport provider is the Public Transport Enterprise
- › Private operators also provide services



Population: approx.
550,000



Impacts of the pandemic on public transport services in Skopje

- › Huge drop in number of passengers (around 50%)
- › Measures introduced (capacity restriction, social distancing, etc.)
- › Reduction in number of bus lines (up to 60% for some operators) and difficulties with maintaining public transport schedules



Impacts of the pandemic on public transport operators in Skopje

- › Significant financial consequences for operators
- › Private operators have reported job losses and debts
- › The private sector believes that it will become financially unsustainable if serious support is not provided



Changes in mobility patterns in Skopje



Before the pandemic

Public transport was the most frequently used type of transport



During the pandemic

Private cars became the most preferred mode

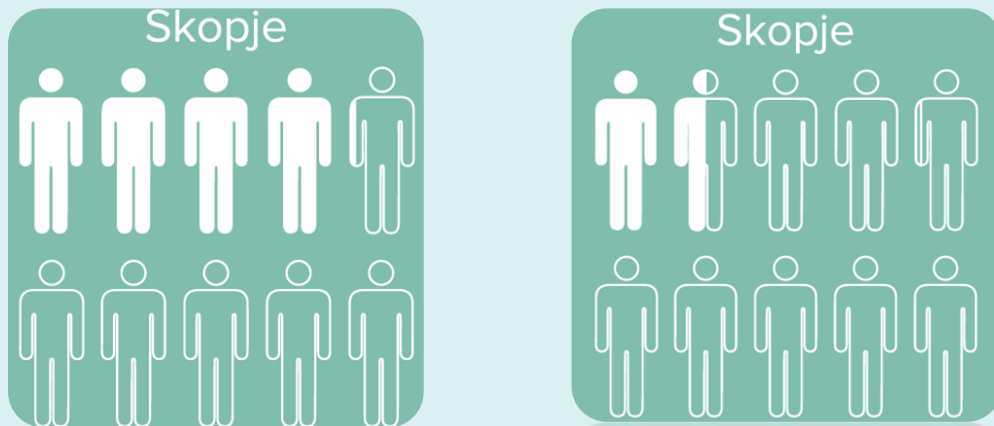
Public transport fell to the 2nd place

Use of bicycles/scooters or walking increased slightly



Changes in mobility patterns in Skopje

Percentage of frequent users of public transport decreased by almost 3 times

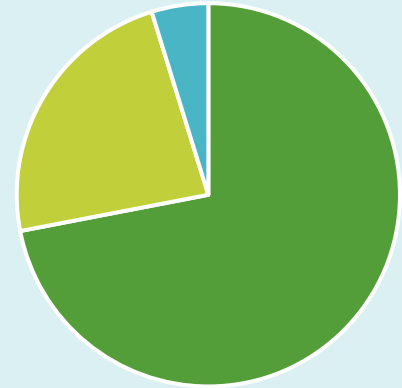


Only 1/3 of users will continue to use public transport the same way after the pandemic



Safety in public transport in Skopje

- > No specific actions taken to protect the H&S of vulnerable people in public transport
- > Users are generally not satisfied with the level of information received or the way public transport authorities responded to the challenges of the pandemic



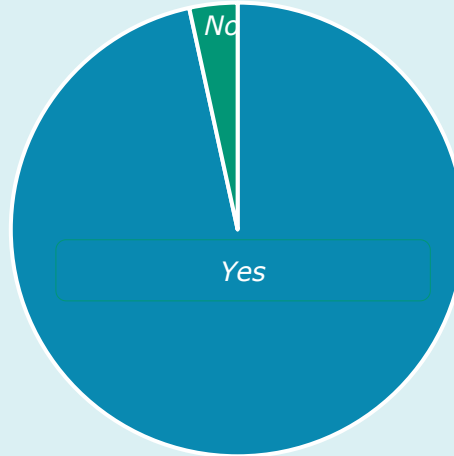
■ No ■ Partially ■ Yes

Do you feel safe in public transport?



Safety in public transport in Skopje

Responses to the question whether passenger protection measures need to be improved



Serbia

(Belgrade and Novi Sad)

Public transport system in Belgrade and Novi Sad

Belgrade: tram, trolley, bus

- 1 public operator for all types of transport (City Transport Company "Belgrade")
- Several private operators for bus transport

Novi Sad: bus only

- Services provided by public city transport company



Population Belgrade:
approx. 1.6 mil

Population Novi Sad:
approx. 350,000



Impacts of the pandemic on public transport services in Belgrade and Novi Sad

- › Public transport services completely halted during some periods
- › Measures introduced (capacity restriction, social distancing, etc.)
- › Number of lines reduced at various stages of the pandemic
- › Decline in the number of passengers using public transport (from 2.5 mil to 35,000 per day in some periods)



Impacts of the pandemic on public transport operators in Belgrade and Novi Sad

- › Decreased revenues from fares (from EUR 5.9 mil to EUR 1.67 mil per month) at some stages of the pandemic
- › Reduced number of lines (from 530 regular to 80 special lines)
- › Reduced number of vehicles in operation (from 1,664 to 273)



Changes in mobility patterns in Belgrade and Novi Sad



Before the pandemic

Public transport was the most frequently used type of transport



During the pandemic

Private cars were the most preferred mode

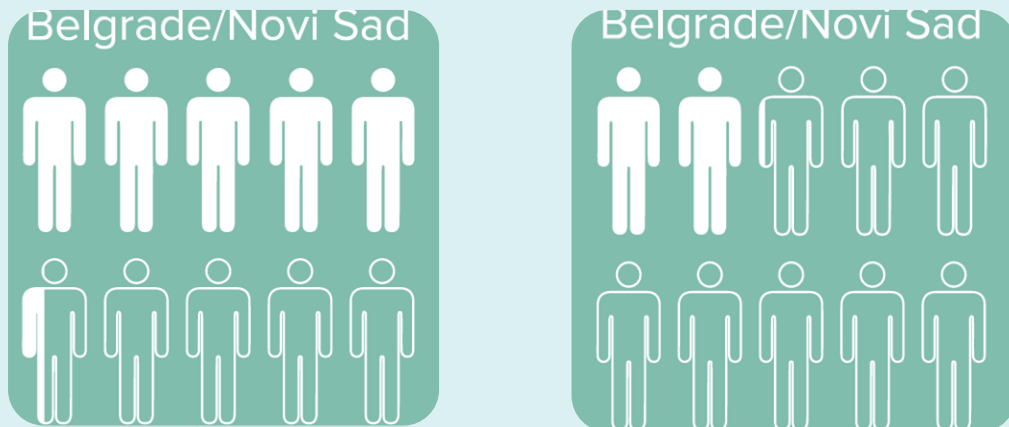
Public transport fell to the 2nd place

Use of bicycles/scooters and walking increased slightly



Changes in mobility patterns in Belgrade and Novi Sad

Percentage of frequent users of public transport decreased by more than twice

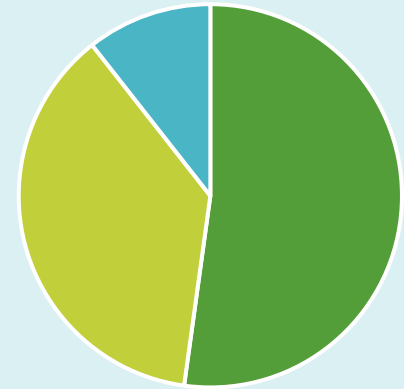


Only 1/2 of users will continue to use public transport the same way after the pandemic



Safety in public transport in Belgrade and Novi Sad

- > No specific actions taken to protect the H&S of vulnerable people in public transport
- > Users are generally not satisfied with the level of information received or the way public transport authorities responded to the challenges of the pandemic



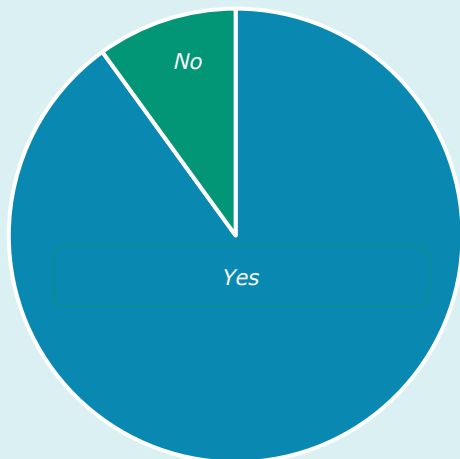
■ No ■ Partially ■ Yes

Do you feel safe in public transport?



Safety in public transport in Belgrade and Novi Sad

Responses to the question whether passenger protection measures need to be improved



Conclusions & Recommendations

Urban mobility challenges before the pandemic

traffic
congestions

undeveloped and/or unsafe
infrastructure for non-
motorised transport

domination of
private
vehicles on
roads

inefficient
public
transport
service
delivery



Mobility changes during the pandemic

Use of public transport decreased to a significant extent



Reasons:

Services were suspended in some periods

Capacity restrictions

Decreased interest of citizens to use public transport due to health and safety concerns



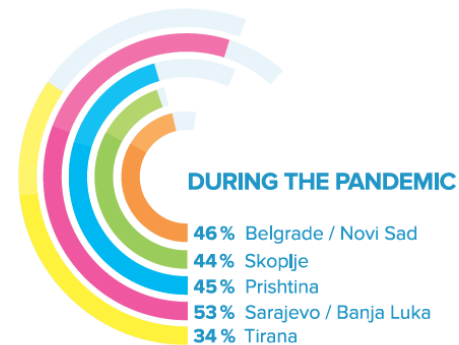
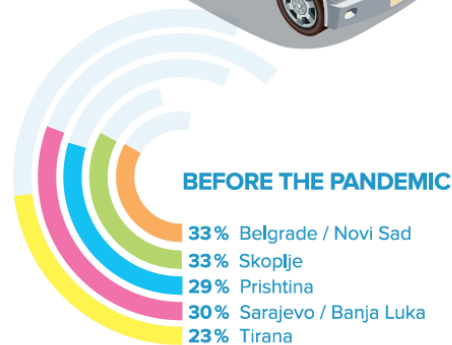
Mobility changes during the pandemic

- Use of private cars increased even more
- Walking increased to some (small) extent
- Use of bicycles/scooters increased slightly or insignificantly in all of the countries



PEOPLE RELYING MOSTLY ON PRIVATE CARS FOR MOBILITY

Private cars became the most preferred mode of transport during the pandemic.



Impacts on public transport operators

- › Business operations of public transport operators in all cities were negatively affected
- › Service prices did not change
- › Most reported insufficient assistance and support from local authorities



Impacts on vulnerable people

- › People without access to alternative types of transportation could rely only on public transport
- › Categories that were most impacted by the shutdown or reduced capacities:

workers with
disabilities

rural households

women (without
access to cars)

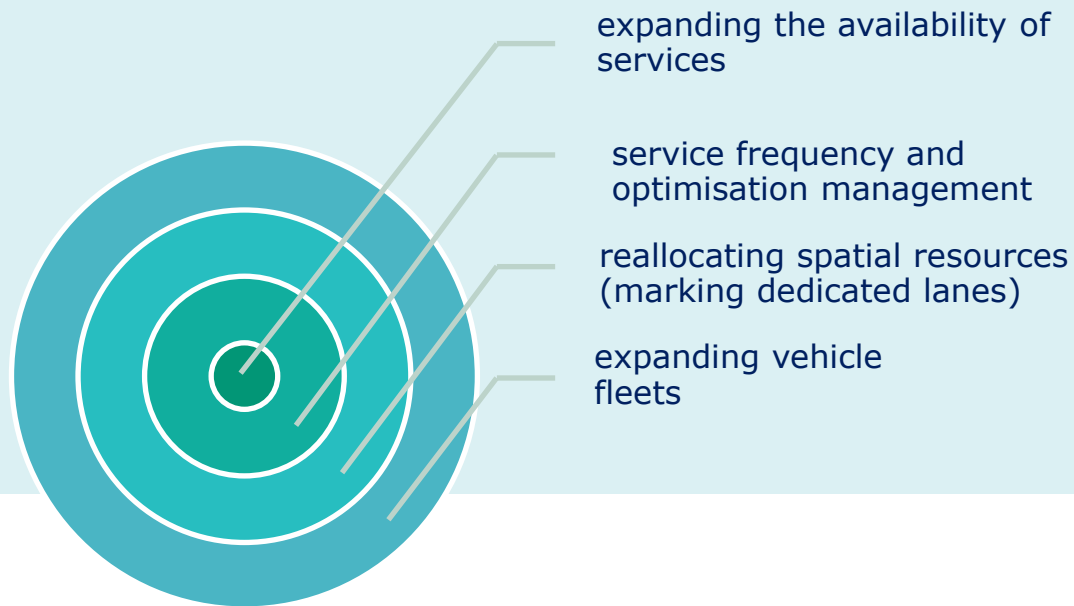
commuting
workers

- › Restricted access to work/sources of income, risk of poverty and limited access to education or healthcare



What needs to be done?

- › Support for operators to help the financial recovery of the public transport sector
- › Planning and investments in:



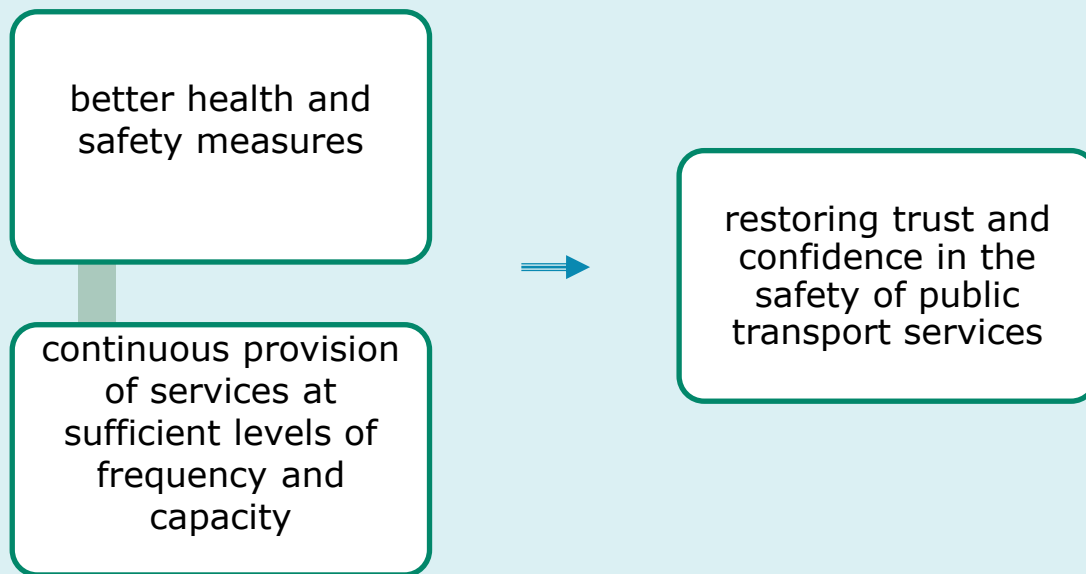
What needs to be done?

Develop specific strategies on:

- how public transport will be regulated and organised
- how disruptions in business operations of operators can be offset
- how communication with the public can be improved and public perceptions managed properly
- how the imposed H&S measures can be better enforced
- how reliable traffic safety data can be collected and monitored



What needs to be done?



Non-financial support options

- › **Policy assistance** to support regulatory initiatives for the development of policies and legislation in the public transport sector
- › **Advisory services** for existing or new private SMEs in the sector
- › **Support through the EBRD Green Cities program** to ensure that the measures identified in GCAPs are better implemented and monitored
 - ✓ knowledge-sharing with policymakers and technical staff within city authorities
 - ✓ Bank-led trainings

