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1

Date 5 June 2025
Subject 5th Progress Report following the June 2020 Ministerial Declaration on International Railway Passenger Transport

Dear colleagues,

The development of the international rail passenger market is essential to the Green Deal, as it enhances accessibility for cities and regions and plays a vital role in the energy transition. In 2020, 27 ministers adopted the Ministerial Declaration on International Railway Passenger Transport. Consequently, the Platform on International Rail Passenger Transport (IRP) was established. The involvement of sector parties in the platform is a vital element, which is reflected also in their contribution in Annex I to the report.

The fifth progress report shows that volume of international rail passenger services is growing in Europe. More than 478 international passenger services are in operation on a daily basis, with an estimated capacity to accommodate 193 million passengers annually, including 66 cross-border night trains running daily. In total, these services make up for a total of 2052 trains per day. This is an increase of 7.2% in number of train services and up to 7.1% more international trains (by a combination of more services and / or higher frequencies). In addition, more services are expected to be launched in the years ahead.The report highlights cases studies throughout the European Union where railway undertakings prepare for more international services and where infrastructure managers and Member States work together on the framework conditions to allow further growth. Sufficient coordinated railway capacity cross border is the key requirement here. The modal share of international rail passenger services in still considerably lower than the modal share of domestic rail passenger services, showing the need to work together on the conditions for growth.

This positive development must however be seen in the context of the ongoing challenging circumstances rail passengers face when it comes to information on services and booking. Here, both voluntary action by the railway sector and a

supportive regulatory approach are needed. Therefore, we await the announced proposals from the European Commission on railway ticketing.

In a number of areas substantial progress has been achieved at EU level. This includes decision-making on an extended core network allowing rail passenger services at 160 km/h as part of the TEN-T network, the update on technical standards (TSIs) and the Commission-launched pilot projects for new services.

The fifth progress report focuses on the results in the international passenger rail market achieved so far. Over the past five years, the IRP platform has worked on identifying common issues to resolve for boosting market development. The platform has contributed to the expansion and improvement of international railway passenger services in various ways and was successful in further raising awareness of the subject's urgency. The ongoing close involvement of stakeholders and platform members alike has been essential and unique to this platform. The development of the market monitor is an important step forward. The report also outlines a model for a more mature market monitoring that would be developed for the period 2026-2030.
In spite of the positive market developments and important efforts by all relevant parties noted in this report, the IRP platform considers that the nature and persistence of the challenges remaining necessitate ongoing consultations. Therefore, the members will consider the continuation of the platform and the needed resources following the publication of the progress report.

Working together with the European Commission, the EU Agency for Railways, the EU joint rail undertaking and OTIF remains of great importance to ensure the right agenda and further improve rail services.

Yours sincerely,

Bescherming persoonlijke levenssfeer

Minister for the Environment and public transport of the Netherlands

Bescherming persoonlijke levenssfeer

Federal Minister of Innovation, Mobility, and Infrastructure of the Republic of Austria

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Platform for
International Rail Passenger Transport

Established after Ministers' Declaration June 2020

Better railway connections for Europe's passengers

A shared agenda

Fifth Integrated Progress Report

2025

Platform for International Rail Passenger Transport
Established after Ministers' Declaration June 2020

Fifth Integrated Progress Report

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0 Management summary

This fifth Integrated Progress Report of the Ministerial Platform on International Rail Passenger Transport (IRP) sets forth the progress made, over the 2024 – 2025 period, regarding the ministers' declaration of the Ministries of Transport of the EU Member States, Switzerland and Norway. Since the start of the IRP in 2020, notable progress was made in a number of ways, as detailed in the present Integrated Progress Report, as well as in the 2021, 2022, 2023 and 2024 reports[1].

Monitoring the development of the international rail passenger market is a key part of the IRP's activities and of this progress report. For the second year, all IRP countries participated in the monitoring exercise. The results show a positive market development and signal that more services are in the making and a need for high quality cross-border services.

Table 1. Key monitoring figures 2025 (EU + Norway, UK, Switzerland)

Type of train pair	Regional	Long-distance	High-speed	Night train
Connections Europe	168	157	86	67
Average daily	7.48	2.67	3.65	0,95
Aggregate	1256	419	313	64
Trains total	2052			
Capital-to-capital connections	45			

In addition, the IRP continues to lay emphasis on the crucial discussion pertaining to customer experience and digitalization. Notably, the Platform recognized the sector's efforts in developing common ticketing standards, but noted that key areas of disagreement within the sector continue to exist. It was observed that conformity with the FRAND principles (fair, reasonable, and non-discriminatory competition) still falls short. Regardless of the standard used, a state of affairs where the incumbent operators exclusively sell their own tickets and those of their cross-border counterparts, can be expected to continue to limit the uptake of open access services and frustrate the rail sectors' ambition to develop as the backbone of a sustainable European transport system. The platform therefore recommends that this concern is addressed progressively and with the public interest as the guiding principle.

Finally, a number of other critical enablers was discussed, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Availability of rolling stock
- High-speed network
- Night trains
- Regulatory framework and competitiveness of the rail sector
- Intermodal connectivity.

[1] https://netherlandsandyou/web/pr-eu-brussels

As many of these topics are interdependent, the Platform members emphasized it is crucial that progress continues across the board. To this end, the Platform therefore made a number of recommendations.

1 Introduction

1.1 The IRP platform

This fifth Integrated Progress Report of the Ministerial Platform on International Rail Passenger Transport (IRP) sets forth the progress made, over the 2024 – 2025 period, regarding the ministers' declaration of the Ministries of Transport of the EU Member States, Switzerland and Norway. During the Transport Council on June 4, 2020, the European countries embraced the initiative to work on a common agenda aimed at fostering and supporting the improvement of international railway passenger transport in cooperation with the relevant stakeholders. As a result of the political declaration, a joint platform of the EU Member States[2], Norway and Switzerland was set up to further facilitate discussions. In 2022, the United Kingdom acceded as an observer. The platform is supported by sector parties (including Railnet Europe (RNE)) and the consumer organizations including European Passenger Federation (EPF). It also involves representatives of the European Commission, European Union Agency for Railways (ERA), Intergovernmental Organisation for International Carriage by Rail (OTIF), and Europe's Rail. Panteia supported the Platform in drafting this report.

The IRP platform decided in its terms of reference for the 2023/2025 period to focus on reporting on results in the international passenger rail market and work on removing bottlenecks with all partners.

The platform serves as a networking place for Member States (MS) / sector to foster innovation and support various bilateral exchanges on cross-border services. In 2024 /2025, the IRP organized meetings in Oslo and in online format. On the agenda were topics such as services, infrastructure networks, passenger experience and ticketing, other critical enablers such as rolling stock and capacity allocation, and the future of the IRP platform and monitoring.

1.2 Vision

The Member States, as well as the European Commission, sector parties and passenger representatives are aware that continuing the status quo pertaining to international railway passenger transport is not an option. The international transport systems of Europe need to be adapted to face today's and future challenges. An interconnected and competitive network of rail passenger services will underpin the economic, social, and environmental sustainability of our continent. It will advance realization of the Green Deal, securing modal shift whilst enhancing sustainable mobility; strengthen European cohesion by reinforcing connectivity and fair development, not only in the most densely populated areas but also with less well-connected regions.

Extensive improvements are imperative in the way international railway services are offered, marketed, and performed. Improvements to the availability and online distribution of tickets,

[2] With the exception of Cyprus and Malta.

travel information, onboard services and better support during disruptions are required. Additionally, a fully integrated and harmonized infrastructure network is needed, with optimized use of capacity, ensuring frequent and efficient passenger services connecting key passenger hubs. The full achievement of the Single European Railway Area is therefore vital. All parties involved have a key role to play in removing the barriers that exist related to digitalization, infrastructure, rolling stock, and legislation.

The IRP considers the following principles to be essential:

1. Enabling rail to become the preferred mode of cross-border passenger transport in Europe;
2. Providing high-quality and resilient rail infrastructure and capacity;
3. Making railways more competitive vis-à-vis air and road transport;
4. Investing in national and cross-border railways.

The development of more attractive and new concepts for international services and their connectivity must first be based on sound market analysis to inform estimates of their long-term viability and therefore sustainability. To provide easy access to simple, reliable, and comprehensive information to customers, digitalization will be an enabler (through an increased use of e-ticketing and a better access to dynamic travel information for instance). Enhancing interoperability, coherent timetabling, and capacity management as well as completion of missing links and removal of bottlenecks are prerequisites for seamless cross-border journeys.

In order to deliver the economic and consumer benefits of competition, the competitiveness of the rail sector is essential, while the coordination between different service providers that is necessary to ensure the synergies of an inter-connected European rail network will require appropriate regulation. Creating equal conditions for all international passenger transport modes will make pricing more transparent and railways more competitive. Finally, improving investment in accordance with market and societal needs is crucial for the successful realization of the international rail passenger network. Long-term investment planning and coordinated infrastructure maintenance and development are needed to provide high quality international rail passenger services all over Europe.

1.3 Status of this document

The present Progress Report sets forth the progress made over the last year. The members of the IRP invite the European Commission, ERA, Europe's Rail, OTIF, sector parties and other stakeholders to consider the findings of this report in the conduct of their works, in particular in view of the European Commission's action plan on international railway passenger transport.

This document is written by the ministries, taking into account the results of the discussions among the members of the Platform, and between the platform and the aforementioned stakeholders. The document does not imply any legal, policy, or financial obligations. The sector parties have drafted their Sector Statement in Annex 1.

2 Development of the international rail passenger market

2.1 Introduction

Over the last years, international rail passenger services have attracted renewed attention. Awareness grew among the Member States, as well as the European Commission, sector parties and passenger representatives that continuing the status quo pertaining to international railway passenger transport is not an option. The international transport systems of Europe need to be adapted to face the challenges of the climate crisis. An interconnected and competitive network of rail passenger services will underpin the economic, social, and environmental sustainability of our continent. It will secure modal shift whilst enhancing sustainable mobility, and strengthen European cohesion by reinforcing connectivity and fair development, not only in the most densely populated areas but also with less well-connected regions.

2.2 Progress

Based on the third iteration of the monitoring exercise, included in this report, a number of important observations can be made regarding the main features as well as the ongoing development of the market. During the typical working day, the European Union, Switzerland, Norway and the United Kingdom are now served by some 478 international railway passenger services, an increase of 42 services compared to last year. Regional cross-border connections total over 168, with an average frequency of 7.5 (unidirectional). On top of this, almost 157 direct intercity services are operated, with an average 2.5 daily trips. High-speed services count a total of 86, on average offering nearly 4 trains per day. Finally, 67 night train connections are available. Together, these services make up for a total of 2.052 trains per day: an increase of some 60 trains per day compared to the previous year. Among many origins and destinations throughout Europe, the number of direct connections between capital cities amounts to 45. Finally, total capacity of the international rail passenger services stands at over 193 million passengers per year (these figures were already displayed in the table on page 1 and are further detailed in chapter 6).

The increase is explained twofold: Firstly more international passenger trains are added to the services. As shown in the next paragraph numerous operators introduced new international services from the mentioned countries. Secondly the refined monitoring system showed more services as well; This has to do with more accurate reporting from the MS but also on the counting methodology.

2.3 Recent market developments

The Platform observed that, although a range of crucial barriers remain to be addressed, positive developments in the international rail passenger market are noticeable. Notably, several Member States reported on important initiatives:

- Austria:
    - For 2026, the opening is foreseen of the new railway infrastructure toward the south of the country and connecting with Slovenia. It is expected that more open access services will come into being.
    - Austria and Poland have started a cooperation to increase the number of services between both countries.
- Belgium:
    - The Belgian Ministry of Transport supports the European Commission's pilot night train projects, including European Sleeper's Brussels–Barcelona service.
    - The financial support scheme for night train operators (covering energy costs and track access charges) ended in 2024, but it may be reassessed depending on available budgetary resources."
- France:
    - A new Paris-Berlin service by DB and SNCF started in December 2024.
    - o An additional low-cost Brussels-Paris service by SNCF and SNCB started in December 2024.
    - o The service Paris–Lyon–Milan reopened in April 2025 after mainline infrastructure repairs. SNCF will operate three daily TGVs while Trenitalia will offer a twice daily service.
- Luxembourg:
    - An initiative is being considered on the side of the region Grand-Est to run an international connection Luxembourg–Basel–Zurich.
- Netherlands:
    - The operators NS and SNCB are working on doubling the frequency of the Amsterdam–Brussels connection from 16 to 32 trains per day, with a faster option which will save about 45 minutes between Amsterdam and Brussels 16 times a day, and the regular train also 16 times a day.
    - The London–Amsterdam service will be running directly again from February onwards, after finalization of terminal upgrades at Amsterdam Central Station.
    - The Three-Country-Train (Drielandentrein) has started operating between Liege–Maastricht–Heerlen–Aachen, including the MAAS-pilot experimenting with ticketing in an international train.
    - The situation with the bridges/tunnels on the HSL does not affect the number of trains, but does give speed reductions and an adjusted timetable.
    - Amsterdam–Budapest
- Norway:
    - Currently, a ticketing system is under development for the corridor Oslo–Copenhagen. Entur and Samtrafiken launched the first step of this in May 2025, by opening up for through ticket sales Oslo – Malmø.
    - Currently, there are 6 connections. One of these still require a change of trains at the border station.
    - Two different commercial day train connections between Copenhagen and Oslo have been announced; one by DSB (Danish train operator) in cooperation with Vygruppen, and another one by SJ (Swedish train operator). If both are established they would be competing connections.
    - Vygruppen is trialing the extension the existing Oslo – Halden – Gothenburg connection to Malmø in July and August of 2025.
    - A possible night train between Oslo–Copenhagen (and possibly Hamburg) is being envisaged by 2030. After the Norwegian Railway Directorate conducted a Request for Information to inform a potential PSO contract, one

operator (Snälltåget) has announced an intention of starting commercial night trains on the route.
    - One of the biggest barriers for further market growth is rolling stock. The Railway Directorate is assessing this issue for Norwegian Ministry of Transport.
- United Kingdom:
    - There is significant interest from several operators announcing plans to enter the market and establish new open access services on cross-Channel routes, including: Evolyn, Virgin, Trenitalia Gemini and Heuro. Plans between operators vary from enhancing capacity on existing core routes, such as London-Paris where there is significant latent demand, to exploring the potential to establish new connections and open new markets.
    - The UK Government is working to address the barriers to entry, including addressing capacity challenges in and around London, such as at stations and maintenance facilities, which acting as a barrier to entry.
    - On 8 May, the UK and Swiss Governments signed a Memorandum of Understanding (MoU) formalising their cooperation to explore the potential for direct rail connections from London-Geneva and London-Basel-Zurich. This will include a joint working group that will bring together both governments and industry experts to address any potential barriers and look at solutions for establishing these direct connections. Slovenia:
    - New services were launched to Austria (Villach and Graz), passengers are satisfied, as they no longer need to change trains at the border.
    - There will be a direct service between Ljubljana and Zagreb.
    - The train station at Gorizia (border of Italy and Slovenia) will be updated on the Slovenian side; on the Italian side, new services have been introduced to Rome and Naples.
    - Investments in new rolling stock railway passenger transport (4 locomotives and 20 wagons).
- Switzerland:
    - A Memorandum of Understanding on Cooperation in the Passenger Rail Sector between the UK and Switzerland has been signed on the 8th of May 2025.
    - Extra trains have been added on the Zurich–München line executed by SBB, DB and ÖBB.
    - The cooperation agreement between SBB and Trenitalia has been renewed. Additional direct connections for the lines Zurich–Venice, Zurich–Florence and Zurich–Livorno have been announced.

Table 2. Best Practice: improving connections Slovenia–Austria, –Italy, –Croatia

From 21 March 2024, seven additional pairs of direct trains are running between Slovenia and Austria, using new, modern Stadler FLIRT sets owned by Slovenian Railways. Thereof, five pairs of new trains are running to and from Graz. Two pairs of additional direct trains are running on the Ljubljana-Graz route and back, two additional pairs on the Maribor-Graz route and back, and one pair of trains on the Pragersko-Maribor-Graz route and back. Both pairs of trains from Maribor and Pragersko also have a connection to Ljubljana. Two additional pairs of direct trains are running daily between Ljubljana and Villach from 21 March 2024.
After completing the first phase of the operational concept of the SŽ FLIRT trains on the Austrian railway network with the introduction of new train connections on the route to/from Graz and to/from Villach from 21 March 2024, the next joint step with Austrian Railways is to find options for extending the runs also in the direction towards Zagreb.
In addition to the already established train connections with Austrian railways, Slovenia/Slovenian Railways continues/continue to cooperate constructively in upgrading existing or establishing new train connections.
Currently, agreements are underway for:

- establishing an hourly train frequency on the Maribor - Graz route and back
- establishing new train connections on the Ljubljana - Villach route and back
- establishing a direct train connection on the Vienna - Villach - Ljubljana route with RailJet trainsets of Austrian Railways
- establishing a direct train connection on the Munich - Salzburg - Villach - Ljubljana - Zagreb route and back.

The introduction of new train connections is planned with the entry into force of the new timetable from 14 December 2025.

Slovenia – Italy

In connection with the European Capitals of Culture project, which is jointly hosted by the municipalities of Nova Gorica and Gorizia Centrale in 2025, the passenger transport of Slovenian Railways, in cooperation with the Italian carrier Trenitalia, has arranged the operation of two pairs of direct trains on the Venezia Mestre – Gorizia Centrale – Nova Gorica route and back.
The trains are operating as part of the Italian train set and are running on Saturdays, Sundays and public holidays in Italy from 8 February 2025 onwards.

Slovenia – Croatia

Slovenian and Croatian Railways have formed a working group to develop the offer in international passenger transport with the aim of improving train connections between Slovenia and Croatia in view of the market potential of the volume of traffic and passenger movements in the direction Slovenia - Croatia and vice versa.

In accordance with the agreement, the working group is discussing the following topics:

- increased frequency of trains between the two capitals (Ljubljana – Zagreb and back) by introducing new train connections in the SŽ Stadler train composition, with the 2025/2026 timetable
- extension of the already introduced SŽ FLIRT trains (to / from Graz and to / from Villach) in the direction of Zagreb
- introduction of new train connections for visiting tourist and commercial events in both Zagreb and Ljubljana
- improvement of tourist routes with Rijeka and Pula,
- introduction of the Zagreb – Djurmanec train in connection with the SŽ-PP train Grobelno – Celje
- introduction of train connections with Split, (direct train on the Ljubljana – Zagreb – Split route or train connection Ljubljana – Zagreb with appropriate transfer to trains in the direction of Split)
- introduction of a train on Ljubljana – Zagreb – Belgrade and back (one day and one night

connection)
- Sarajevo – Ljubljana train connection via Zagreb
- use of European funds for connecting local border traffic (SUSTANCE Villa Opicina - Divača - Rijeka, EGTC connection Ljubljana - Novo mesto - Karlovec - Zagreb).

All of the above-mentioned railway connections, regardless of whether they are already established or those that are yet to be established, are/will be included in the Public Service Contract (PSC) of all participating railway operators.

Ticket sales for train travel are also enabled in the sales system of each railway operator.

2.4 Conclusions

At present, Europe is served by a significant network of international rail passenger services, with more services being prepared. With total capacity of some 189 million passengers per annum, the railway network is considerable even compared to Europe's large airports. Nevertheless, it must be concluded that sustained growth of rail passenger services is possible only when key barriers are addressed, as the potential is significant. Today the international railway passenger transport is a fraction in most cases of the domestic/national railway passenger transport. There is a huge market to win.

It is noticeable that the demand for additional services is growing. Increasing service level and quality directly leads to increased passenger numbers. The examples shown in this report (in the text boxes) show the potential of the growth in numbers. The increase comes both from open access operators as from new concessioned services. Especially interesting are the international services running in the national concession, but are extending their services over the border in open access.

The number of new international services announced shows there is still huge potential, currently focusing the Visegrad countries, Nordic countries and Benelux; but not limited to these regions. Neither there is a dominant service model: new high-speed initiatives pop up on the high-speed lines, intercities in those countries lacking high-speed infrastructure and new concessioned regional lines are developed equally. The diversity shows that additional studies are needed to evaluate best practices and that monitoring is crucial to get deeper understanding of the international rail passenger market.

3 Customer experience and digitalization

3.1 Introduction

As the Platform noted in previous years, full availability of timetable and tariff data and real-time information is prerequisite for smooth international journey planning and railway operations. In addition, for railway transport to be competitive, the process of buying and selling international railway tickets must be consistently customer friendly and non-discriminatory. Both data availability and smooth, non-discriminatory ticketing are still lacking. Planning and booking international journeys takes navigating through various ticketing systems and pricing structures across different countries. This fragmented set-up not only complicates trip planning but also disrupts multi-modal journeys, often requiring passengers to purchase separate tickets for each leg of their travel.

Playing field conditions are not only relevant for competition between rail and other modes, but also in an intramodal sense. All other transport modes have intramodal competition and thus benefit from innovation and customer choice, whereas new entrant operators in rail are still constrained in increasing their market share within the mode. Enforcing impartial retail, data sharing and through ticketing, in conformity with the FRAND principles (fair, reasonable, and non-discriminatory competition) is ultimately expected to contribute to modal shift. However, much work still needs to be done in that regard, whereas there is no agreement yet on legislative action or whether the matter should be left to sector initiative. Also, current developments at the European level include a number of important activities that should be considered in coherence. This involves the update of the ITS Directive (Directive 2010/40/EU) and the Delegated MMTIS Regulation (Regulation 2017/1926). These discussions pertain to the Multimodal Digital Mobility Services (MDMS) process and a variety of national and international initiatives, pilots and activities with regard to rail as well as the multimodal sector.

3.2 Progress

As stipulated in Regulation 2021/782, infrastructure managers (IMs) and railway undertakings (RUs) are obliged to make available information on both timetables and tariffs, required for smooth international operations and passenger information. Although in a number of MS the sharing of real-time information is performed well, there still is a significant improvement potential due to not yet fully implemented data standardization and insufficient digitalisation. This often leads to different and contradictory real-time information with possibly unnecessary breaks in the travel chain. Furthermore, data exchange between domestically oriented ticketing systems of the railway undertakings (RUs), other operators and ticket vendors, still presents untapped potential.

The requirements for publishing timetable data and tariffs are already obligatory since 7 June 2023, but not yet fully implemented. In addition to the aforementioned Regulation 2021/782, the Delegated Regulation (EU) 2017/1926 (MMTIS) stipulates that data holders shall provide their respective data (listed in the Annex of 2017/1926) via the national access points. Member States have an important role in setting up these national access points, which shall make accessible for data users the static, historic, observed, and dynamic travel and traffic data of different transport modes, including data updates, provided by the data holders.

Furthermore, the Delegated Regulation 2017/1926 lays down that Member States shall reach an agreement, in cooperation with relevant ITS stakeholders, on the metadata requirements. The data holders shall ensure that they provide the metadata on the basis of those requirements.

Depending on how these data are made available on the national access points, an important aspect is for the Member States to make sure that the data sets are compatible in the national profiles. As a minimum, a national register is needed (which would include at least metadata and a reference to the data source), as well as to consider a national regulation to ensure that international interoperability is included. Also, the Member States need to ensure the implementation of Regulation (EU) 454/2011 (TAP TSI) by all railway undertakings, to share the timetable and tariffs (including fare tables for basic fares but also discounted fare types) data with other railway undertakings, public authorities and 3rd parties (e.g. ticket vendors).

Table 3. Best Practice: The Amsterdam-Budapest Corridor

Introduction
In 2024, ProRail and DBInfraGO initiated a study on strengthening the Amsterdam-Frankfurt-Vienna-Budapest corridor. The study, discussed through the IRP Platform with nine member contributions through feedback, resulted in a shared understanding of the corridor's challenges and a proposal for action per actor group. While not a formal part of the TEN-T network as a single corridor, the Amsterdam-Budapest line connects two EU priority corridors. Namely, the Rhine-Danube and the North Sea-Rhine-Mediterranean corridors. This therefore positions it as a strategically important link in European cross-border rail. The European Commission has also made clear its ambition for a single booking and ticketing system, providing political momentum.

Previous Situation
Until recently, no coherent or continues development approach existed for this connection. Services fragmented, relying on separate legs across multiple national systems. Rolling stock availability, ticketing incompatibility, and unpredictable allocation systems have long discouraged new entrants and hindered passenger growth. Despite open access opportunities, the corridor has suffered from low levels of cross-border rail cohesion.

Current Structure and Sector Organisation
While various RUs currently operate along segments of the corridor, no unified product exists. ProRail and DBInfraGo have taken the initiative in conducting initial research. The next phase requires stronger alignment between railway undertakings (RUs), infrastructure managers (IMs), and ministries of transport (MoTs). Efforts such as time tabling strategies, rolling stock mapping, and coordinated framework agreements are underway, but require stronger commitment and regular updates—especially on the Hungarian leg. Meanwhile, the European Commission's 2025 legislation on capacity and ticketing standards will directly affect the viability of new services.

Key Issues to Address

There are seven issues that need to be addressed in this case:

1. Rolling stock compatibility: Lack of interoperable rolling stock across countries remains a practical constraint, especially east of Vienna. Certification and funding are ongoing challenges.
2. Allocation and long-term timetabling: RUs require predictability in order to justify investments; IMs are working on longer-term capacity strategies, but a clear roadmap is needed.
3. Fragmented ticketing: Some countries allow integrated ticketing (e.g., Hungary), while others do not (e.g., the Netherlands). A uniform EU ticketing regulation is crucial.
4. Track access charges: Discrepancies between national charging systems create uncertainty and reduce competitiveness of international services compared to road or air transport.
5. Data sharing: To support robust business cases, RUs must share anonymised operational data. An external facilitator could provide secure analysis and ensure confidentiality.
6. Political uncertainty: Many IMs and RUs cite lack of political commitment as a reason for stalling action. Governments must take a stronger steering role.
7. Continuity risks: Governments should explore options to prevent sudden service discontinuations and support long-term corridor development.

Next Steps and Financial Implications

To move forward, each actor group has a distinct role to play. Railway undertakings (RUs) are encouraged to seize open access opportunities, improve ticket integration across borders, and contribute anonymised data to support neutral market studies.

Infrastructure managers (IMs) should publish technical information on the corridor and commit to long-term capacity planning, providing the predictability RUs need to invest. Ministries of Transport (MoT) are asked to offer political guidance, align with upcoming EU regulation on ticketing and capacity allocation, and explore mechanisms to support rolling stock funding and ensure service continuity.

With the support of all stakeholders, the upcoming RNE-led European market study can help determine the corridor's true potential, especially when road transport is included as a benchmark. By coordinating efforts across these layers, the Amsterdam–Budapest has the potential to become a competitive, integrated international rail link.

3.3 Ticket distribution

As noted in previous progress reports, the essential improvement of ticket distribution requires common standards, to which all stakeholders have equal access. Also underlined was the importance, particularly in the light of recent legal cases involving railway undertakings in certain Member States, of passengers having adequate and non-discriminatory access to information and commercial conditions on all reasonable journey options, integrated information on timetables and fares (together with other information likely to affect consumer choice such as reservation possibilities, catering provision, class of travel offered, etc.), and provision for comparing all reasonable options, including multi-modal products and those marketed by third parties[3].

[3] A useful overview of the key issues is found in the ERA report regarding Technical documents of the TAP TSI concerning ticketing and the recent competition decisions and national rulings under unfair trade law.

Eurobarometer survey
The Eurobarometer ticketing study that was conducted last Autumn and published this Spring 2025 supports a statement calling for urgent legislative action on ticketing. The survey showed that almost 60% of EU citizens polled never or rarely combine rail journeys with different operators. The survey is showing that 23% of passengers couldn't find a suitable combination, that 18% didn't want to buy separate tickets and risk being stranded, 11% said that they didn't know where to look and a further 9% stated that they could not buy all their tickets in one place. The survey covered regional, long-distance, and international travel, including specific questions on train travel.

The project OSDM (Open Sales Distribution Model) was released in 2020 under the supervision of the UIC with this goal in mind. CER published the 'Ticketing Roadmap' in 2021 with the objective of implementation of 8 improvements for travelers by 2025 and another 5 by 2030. For example, there should be minimum standards for international tickets, with regard to products, price calculations, passenger categories, rules for refunds etc. Attention is also needed to practical issues regarding access and (commercial) conditions using OSDM. An alternative format, NeTEx (based on Transmodel) was developed as a CEN standard in 2014, and was formally established as a requirement in the MMTIS regulations in autumn 2017. Since then it has been used for multimodal transport all over Europe.

The initiatives to make ticketing easier, as well as to introduce new ways of distributing tickets through third parties, still need to be implemented in full. The CER, within the framework of its 'Ticketing Roadmap', has reported that 6 out of 24 participating operators will have implemented OSDM by the end of 2024. At the time of drafting this report, OSDM is already implemented in Sweden. NetEx has been applied in Norway since 2017, and all necessary functionalities for long-distance services were included in 2021.

However, both standards' features still require further development and simplifications. Current shortfalls include digital tickets and the opportunity to sell or be part of mobility packages. RUs typically want freedom to exercise maximum commercial flexibility. Passengers, understandably, require the ability to purchase through-tickets at transparently competitive prices having been informed comprehensively about all the reasonable journey options. Policy analysts are aware that the great majority of passenger journeys are made using PSO-regulated (and guaranteed) services. Some therefore argue that this should be reflected in the extent to which RUs are allowed to exercise unfettered commercial freedom, whereas others place greater emphasis on the potential for innovation in an unregulated market. These considerations fit within the current preparations for the MDMS Regulation. Also, the possibility of third party sales is considered important by some.

Parts of the sector argue that state-owned rail incumbents' in-house ticketing platforms (such as SNCF Connect, PKP Intercity and DB Navigator) effectively maintain market dominance and steer passengers to their own services. Having so-called Significant Market Power (SMP), the alleged steering of passengers to their vertically integrated rail operators that share the same brands, and to their cross-border counterparts, would therefore constitute collusion. This then starves the smaller new market entrants' of the exposure needed in order to achieve commercial viability. Following this reasoning, calls are made for the introduction of anti-steering regulation.

CER wishes to express its concerns regarding the tone and conclusions of the IRP report, particularly on the subject of ticketing. The report appears to uncritically reflect the position of ticket vendors, without providing supporting evidence for its claims, and notably overlooks the recent Eurobarometer survey (https://europa.eu/eurobarometer/surveys/detail/3178) showing that most EU citizens (73%) already find it easy to book rail multi-leg, multi-operator journeys. This imbalance risks distorting the debate and overstating the urgency of issues that are not substantiated by data. While CER fully supports further improvement in rail ticketing, this progress must be grounded in a realistic understanding of the current market and the initiatives already in motion. In this regard, the CER Ticketing Roadmap offers a concrete, industry-led path forward—practical, ambitious, and centred on delivering better solutions for passengers, beyond the narrow framing of third-party data access and cross-operator sales.

The Platform recognized the sector's efforts in developing common standards, but noted that key areas of disagreement within the sector continue to exist and noted that a number of the significant first phase objectives set out in CER's Ticketing Roadmap for 2025 had still to be delivered. Specifically, it was observed that OSDM's alignment with the aforementioned FRAND principles remains a point of contention. The identified shortfalls are not primarily technical. Regardless of the standard used, a state of affairs where the incumbent operators exclusively sell their own tickets and those of their cross-border counterparts, can be expected to continue to limit the uptake of open access services and frustrate the rail sectors' ambition to develop as the backbone of a sustainable European transport system. The platform recognized the issue as existential and therefore recommends that this concern would be addressed progressively and with the public interest as the guiding principle.

3.4 Conclusions

The ongoing development and implementation of common data standards are vital steps that must continue without delay. For reasons of efficiency, standards should be further developed in enhancing rather than competing fashion. To do so would require, first and foremost, a convincing solution for any competition related concerns pertaining to data standards being developed. Specifically, it should be guaranteed without delay that third parties (i.e. ticket vendors) are provided with full data and fair remuneration on equal terms, and that any common standard enables through ticketing for an optimal customer journey, regardless of the RU. In doing so, all parts of the sector must actively pursue the spirit of the FRAND principles in the interest of the public good.

The Platform considered that ongoing work on the MDMS regulation may come a long way in addressing these requirements. However, it emphasized that the urgency of providing more and better international services dictates that regulatory discussions should not negatively impact the work on technical solutions

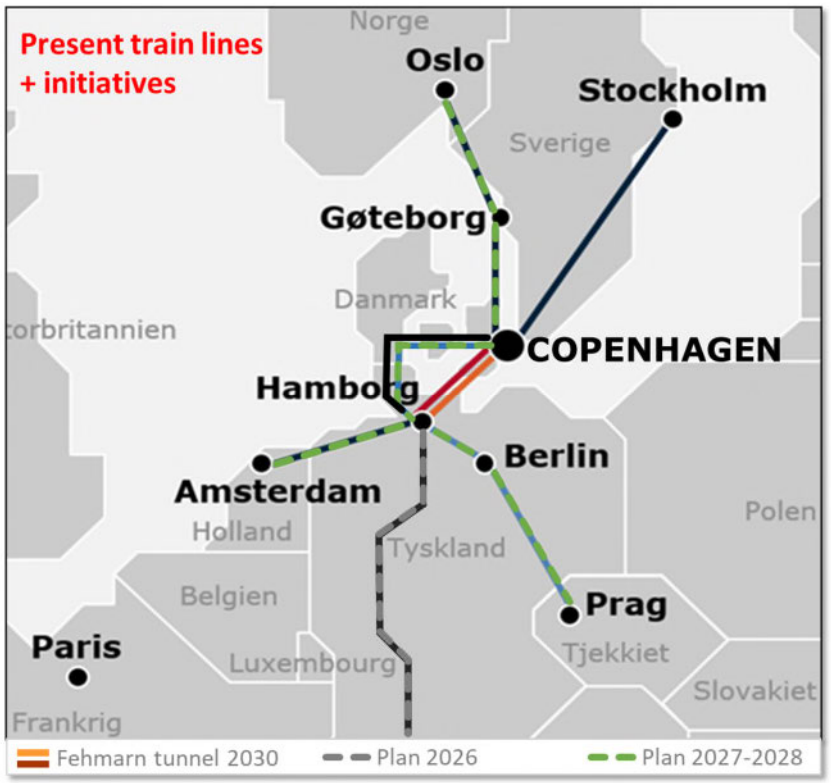
Table 4. Best practice: Linking up the Scandinavian train services

Intro

In less than 5 years (2029-2030) the Fehmarn Belt tunnel link will open for both cars and trains. According to the state treaty between Denmark and Germany, railway lines in the hinterland should be upgraded and be ready for train operation the same day as the coast-to-coast tunnel connection between Puttgarden and Rødby opens. Due to a more direct line between Copenhagen and Hamburg (i.e. 160 km shorter) and an increased line speed, the connection will lead to a reduction in travel times of >2 hours for cross-border services.

Present situation

At the moment all day trains travel between Hamburg Main Station and Copenhagen Central Station (this is the Eurocity trains operated by Danish state railways DSB). The frequency is 5 trains per day + 2 seasonal trains per day each way. That results in about 2-3 hours between departures. Two night-trains have long routes Sweden-Denmark-Germany. Snälltåget runs the 1.450 km line Stockholm-Copenhagen-Hamburg-Berlin and SJ the Euronight train Stockholm-Hamburg.



Corridor: Oslo – Gothenburg – Malmö – Copenhagen – Hamburg – Berlin – Prague

Organizational set-up
DSB is operating the connection Hamburg-Copenhagen as a commercial service. SJ has a PSO contract for part of the route for the Euronight train. Snälltåget is running the service as a purely commercial service without state subsidy. DSB has an agreement with DB International on through tickets for connecting train lines in Germany and Denmark respectively.

Under an EU pilot scheme of growing European cross-border services Snälltåget has informed about a plan to expand services from Swedish cities to several more Danish cities (that is Aarhus among others), and set up a second connection to Germany in the coming year – i.e. starting a daytime service between Hamburg and Copenhagen from 2026-2027 on a commercial basis.

Building up a 4-countrie continuous north-south line
In order to prepare for the inauguration of the Fehmarn Belt tunnel link DSB intends to increase its present international services, gradually strengthening the market position. A collaboration between DSB and the Norwegian Vy will see new direct Talgo-train services between Oslo-Copenhagen. This line will be extended to Hamburg in 2 years' time. In addition, DSB also collaborates with the Czech CD to extend the present ComfortJet train line Prague-Berlin-Hamburg to Copenhagen 2026-2027. DSB, Go Volta and Flixtrain have indicated their interest in new services, e.g. linking Amsterdam-Bremen-Hamburg-Copenhagen.

Issues to overcome
Beside the agreement between RU stakeholders about business plans, sales platforms and marketing, setting up the partnership for the daily work-split and cooperation, etc. also many technical hurdles have to be solved. Homologation and approval of new Talgo train units demonstrate disappointing slow progress – although all parties still trust to find light at the end of the tunnel.

Regarding the mega-infrastructure project of the corridor Copenhagen-Hamburg most of the hinterland upgrading work on the Danish side is nearing its completion or at least is in good progress according to the construction schedule. The 220 km alignment from the tunnel entrance to Copenhagen will be approved for minimum 200 km/h operation, except for 2 small sections through the city of Nykoebing F. and Ringsted (max 160 km/h). The Fehmarn tunnel coast-to-coast construction project is a couple of months behind schedule. Opening is still expected in 2029. DB InfraGo also expects to have the 88 km section of Lübeck-Puttgarden double tracked and upgraded to 200 km/h by 2029 except for the small section of Fehmarnsund, still single-track and 160 km/h.

Two fast international passenger trains and 2 freight per hour and direction form the basic traffic pattern. DSB informs, that they will run every hour Hamburg-Copenhagen. Supplementary it is expected that regional trains will be continued 'to the other side' every second hour. Since Hamburg Hbf shows a limited platform capacity some of the trains from Berlin to Copenhagen could follow the Schwerin stretch to Lübeck. For Copenhagen Central station 3 extra platforms are planned to be built around 2026-2030.

4 Other critical enablers

4.1 Introduction

In order for the EU to achieve its environmental targets and improve connectivity, modal shift towards international railway passenger transportation is crucial. Next to customer experience and digitalization, the Platform therefore considered other vital enablers, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- Night trains
- Regulatory framework and competitiveness of the rail sector.

Next to completing the TEN-T network and rail technical interoperability, the governance framework for cross-border services retains important barriers related to capacity allocation, as well as differences between European countries on track access charges.

A key obstacle for new services, especially those new services based on the open access principle, are the large upfront investments required for rolling stock. These make it difficult for smaller entrants to arrange for the necessary investment guarantees. The lack of rail interoperability in Europe impedes the birth of a functioning second-hand market for rolling stock.

For night trains, specifically, these matters are especially pressing due to the relatively high operational costs. At the same time, path allocation is challenging: night trains arrive during rush hours, have specific characteristics (stopping at a limited number of stations, running faster than regular trains) and require smooth international paths unhindered by night track maintenance or freight operations.

Finally, in order for rail to compete with other modes, including air travel, ultimately equal competition should be created. In addition, alignment with the objectives of the Green Deal means that a lower VAT, fuel tax, carbon emission trading and employment condition treatment should be considered for green transport modes.

Table 5. Best Practice : Ouigo "Train Classique" Paris – Brussels

Intro
In the summer of 2024, the Belgian state-owned company SNCB initiated a special service between Paris and Brussels for the Summer Olympics and Paralympics, using the conventional line (not high-speed) and lasting around 3 hours. It was a success and SNCF Voyageurs and SNCB decided to build a partnership to reopen this service from December 2024, with 3 trains each way every day.

Previous situation
The Paris-Mons-Brussels direct service was suspended in 1996 when the high-speed line opened to service. With the new high-speed line, it was possible to connect both capitals in 1 hour 25 minutes, as opposed to around 3 hours through Mons.

Nowadays, Paris and Brussels are very well connected through the Eurostar service, using the high-speed line with around 30 trains each way every day (around a third of them stop in Brussels on the way between Paris and Amsterdam). However, this high-speed service is without competition, at least for the next few years and the occupancy rate is very high: the commercial, cultural and institutional bounds between both cities make it the most popular in Europe amongst cross-border high-speed services. The prices are then often very high, and Thalys (former name of the current Eurostar) launched a low-cost offer in 2016. It was not a profitable service, notably due to high track access charges in the high-speed sections and it stopped circulation in 2022.

How is it organised
The service is an industry initiative between SNCF and SNCB, open-access, without subsidies. Despite the commercial branding "Ouigo" (the name of SNCF Voyageurs low-cost branch), the rolling stock is provided by SNCB, whose conventional lines rolling stock is more suited to the service than SNCF Voyageurs, that focuses on high-speed trains.

Since the suspension of the service, the network was still used by regional trains, which means that no specific works were necessary on the infrastructure. The service stops in Creil (with Paris-Creil tickets not being commercialised to avoid competing with local PSOs), Aulnoye-Aimeries in France and Mons in Belgium. It uses yielded fares, but significantly lower prices than the Eurostar service: from 10 to 49€.

It is important to note that SNCF and SNCB own significant shares of Eurostar, and as such this service was not imagined to bring a heavy competition to the Paris-Brussels Eurostar service, but to complete the offer and conquer market shares against other modes. Paris-Brussels is still a very popular bus route, but with a longer duration (4 hours) and less comfort, SNCF and SNCB hope that there could be some modal shift. A significant number of cars circulate between Brussels and Paris every day as well, while flight services are already down to one service every day with Belgium Airlines.

Issues to overcome
One of the issues was to make this service known to travellers, however they are distributed through SNCF and SNCB direct platforms and many other platforms. The significant difference in price made it popular right away, as there was a 75% occupancy rate from the first few weeks, with 2 700 travellers every day.

As rolling stock was available and infrastructure ready, there was no significant barrier to prevent this service from being launched. Its commercial success will depend on the quality of the service and its consistency, but also on whether 3 hours is a commercially viable option next to a 1 hour 25 minutes more expensive option. If so, that could pave the way for other commercial, conventional-line and long-distance services reopening next to high-speed services to improve the cross-border rail market share.

4.2 Progress

4.2.1 Network and technical interoperability

Europe's railway network was given a renewed basis with the adoption of the revised TEN-T Regulation by the European Parliament 24 April 2024. A prerequisite for a high-quality network of international rail passenger services is the completion of the core network per 2040, which is to be fully electrified, ERTMS equipped, and allow for speeds of up to 160 km/h. These infrastructure service level goals were put in a strategic context by the Sustainable and Smart Mobility Strategy of the European Commission (SWD(2020) 331 final), which is set ambitious growth targets for rail, and for the long distance/high speed passenger rail segment to double the ridership by 2030 and triple it by 2050.

In addition to the ongoing endeavors to complete the TEN-T infrastructure network, the Platform reaffirmed that development of a full web of international rail passenger services depends on advancing rail interoperability. Interoperability pertains to purely technical standards, but also to procedures for authorization and capacity management.

The passenger pilot projects carried out under with support of the European Commission and evaluated at the end of last year are intended as an impetus for better interoperability. The Commission's support for the pilot projects is not financial assistance (as the 4th Railway Package envisions that rail services in Europe should develop driven by market initiative), but rather technical assistance to overcome barriers that risk market entry by new or improved services. Barriers for international services, including related to capacity allocation (journey time, path consistency and reliability, etc.), are being tracked down and tackled. While the Commission pilot program covers all kinds of entry barriers (ranging from vehicle authorization, border control or competition issues to ERTMS, rolling stock financing or ticketing), Rail Net Europe (RNE) was contracted by the Commission to focus on the capacity management issues of the Pilots.

Figure 1. Map of the Commission's passenger pilots

RNE analysis of pilot barriers

Earlier on, four key problem areas were identified: speed of train path; reliability of train path; consistency of train path; and commercial viability of train path. A gap analysis was undertaken, taking into account specific input from the pilots. This gap analysis is the basis for recommendations that are currently being reviewed and transformed into the final recommendations by a Task Force set up for this purpose. The final recommendations were endorsed by the December 2024 General Assembly of RNE.

In-depth analysis by RNE of the railway undertaking experiences during the passenger pilots yielded the following basis for the future recommendations in the four problem areas:

Speed of train path:

- Multi-network train services have complex capacity needs that are hard to realize without pre-planning
- Currently no European framework to set realistic (market-based) expectations on cross-border capacity
- What RNE plans to do: European Transport Market Study, Capacity Concepts

- Role of Member States: include cross-border market potential in national planning framework
- Cross-border train services' complex capacity needs are hard to fulfill under current priority rules
- Current priority rules predominantly 'winner takes all' approach, do not incentivize good compromises
- **What RNE plans to do**: Continue work on socio-economic allocation criteria as solution by capacity reg.
- **Role of Member States**: promote solutions that apply 'appropriate priority' (best scenario approach) instead of absolute priority

Reliability of train path:

- Without planning stability over a single timetable year, high risk to enter new markets where there are no proven timetabling solutions.
- Framework Agreements can be an enabling instrument to ensure business continuity and securities for rolling stock funding
- **What RNE plans to do:** continue work in Task Force Framework Agreements/Rolling Planning
- **Role of Member States:** set a landscape that encourages IMs to offer FAs for cross-border operators

Consistency of train path:

- Currently, the risk that partial offers of different networks match at border points are predominantly borne by cross-border operators
- The risk stems both from currently diverging national annual allocation timelines and from last minute TCRs
- **What RNE plans to do:** continue work for PCS common use, TCR tool integration, Commercial Conditions
- **Role of Member States:**set a funding landscape that allows IMs to roll-out European solutions and to have stable advance planning

Commercial viability of train path:

- Track Access Charges (TAC) are predominantly not a capacity allocation issue, but its application have timetabling consequences
- Concept of marginal costs and mark-ups differ heavily from other modes of transport
- **What RNE plans to do:** RNE has a scope limited to capacity management implications of TAC issues
- **Role of Member States:** Implement national TAC schemes in a way that encourages both IMs and RUs to better use rail capacity

In addition, while rolling stock availability is not in scope of its activities within the passenger pilots, RNE emphasised there is a strong correlation between it and capacity management: wherever a pilot applicant already has (at least a contract for) rolling stock, it is observed that timetabling efforts make progress, whereas if there is no available rolling stock, timetabling efforts often fall behind. This indicates a negative spiral as on the other hand, having a viable train path is an important factor at investment in rolling stock.

Pilot progress

A number of pilot projects aim to become operational in the timetable of 2026, with others to follow later. In the table below, the pilots and their progress are described in detail.

Table 6. Overview of the Commission's passenger pilots

Pilot nr.	Applicant	Corridor	Type of service	IMs involved
1	Hungarian MoT	Vienna-Budapest-Arad/Oradea	Regular day services	ÖBB, MÁV, CFR
	Key CM issue / success criteria: Safeguarding the capacity product established in the Pilot against ad-hoc path requests, TCRs, etc. Consulting the market and finding interested RUs for the path products in a market neutral way Brief status: the pilot is currently on hold as there was no interested RU found yet with whom the pilot applicant could work together			
2a	SJ	Stockholm-Copenhagen-Hamburg-Berlin	Improving existing night service	DB InfraGO, Banedanmark, Trafikverket
	Key CM issue / success criteria: to have a single stable path offer in PCS (instead of 3 unharmonized replies by 3 IMs) Brief status: after the kick-off meeting and capacity management deep dive, no further assistance was required by the pilot applicant from RNE. The service started shortly after its inclusion as passenger pilot.			
2b	SJ/DSB	Oslo-Malmö-Copenhagen-Hamburg	New daytime connection(s)	DB InfraGO, Banedanmark, Trafikverket, Bane NOR
	Key CM issue / success criteria: to realize attractive enough travel times by a fast and stable path offer matching at border points Brief status: the pilot was planned with SJ locomotive and DSB coaches. Due to the unavailability of suitable locomotives at SJ, the pilot composition was changed to DSB and Vy, with planning ongoing to fit the pilot service within the existing product range of Vy (regional PSO train from Oslo to SE border, extended on open access basis to Göteborg) and DSB (EuroCity trains to Germany).			
2c	Snälltåget	Stockholm-Copenhagen-Hamburg-Berlin	Improving existing night train, new day train	DB InfraGO, Banedanmark, Trafikverket
	Key CM issue / success criteria: to have a realistic single path offer that is stable with regard to TCRs, with the TCRs properly coordinated Brief status: after the kick-off meeting and capacity management deep dive, no further assistance was required by the pilot applicant from RNE.			
2d	CD/DB/DSB	Copenhagen-Hamburg-Berlin-Prague	Extending existing regular day trains	Sprava Zeleznic, DB InfraGO, Banedanmark
	Key CM issue / success criteria: to be able to provide the through connection between Praha and Copenhagen by binding through domestic system paths over the entire timetable period – without delays and detours caused by TCRs resulting system paths to mismatch either in Berlin, Hamburg or at the border points. Brief status: the RU partners in the pilot have chosen to align independently with the respective IM in their area of operation within the respective domestic alignment framework. The launch of the service is being delayed both due to rolling stock compatibility issues and consecutive major track works between Berlin-Hamburg, the Elbe valley and north of Hamburg in Germany, which would effectively mean constant disruptions after the launch of the service.			
2e	Flixtrain	Stockholm-Copenhagen-	New day train	DB InfraGO, Banedanmark, Trafikverket

Pilot nr.	Applicant	Corridor	Type of service	IMs involved
		Hamburg-Berlin-Leipzig		
	Key CM issue / success criteria: in the kick-off meeting, the pilot applicant referred to the high TACs in some of the affected networks a significant factor for building a viable business case for the service. Brief status: The pilot was put on hold by the pilot applicant			
3	Flixtrain	Munich-Zürich	New day trains	DB InfraGO, SBB
	Key CM issue / success criteria: to obtain capacity rights within Switzerland, where the 4th Railway Package is not fully applied and the pilot applicant needs a Swiss licensed local RU partner to access the network. Brief status: after the kick-off meeting and a high level capacity management alignment, no further assistance was required by the pilot applicant from RNE.			
4	Midnight Trains	Paris-Milan-Venice	New night train	SNCF Réseau, SBB, RFI
	Key CM issue / success criteria: to have a business viable train path with a run time less than 14 hours, and being able to offer this product all around the year despite multiple ongoing TCR restrictions Brief status: Midnight Trains filed for bankruptcy and quoted lack of certainty for appropriate track capacity and thus no trust from potential investors on business continuity and thus no possibility to secure rolling stock for the service as the key reason for the failure to set up the pilot service.			
5	WESTBahn	Munich-Vienna-Budapest	New day train(s)	DB InfraGO, ÖBB, MAV
	Key CM issue / success criteria: to obtain capacity rights beside the current incumbent operation between Vienna and Hungary (with the current incumbent operation being covered by PSO on the Hungarian section). Brief status: The pilot was put on hold by the pilot applicant quoting delays of the authorization of the rolling stock ordered that is compatible with the Hungarian network, and instead concentrating with the existing rolling stock on growth at the existing Austrian-German market.			
6	Eurostar / NS	London-Brussels-Amsterdam	Improved day trains	HS1, Eurotunnel, SNCF Réseau, Infrabel, ProRail
	Key CM issue / success criteria: capacity for 5 train pairs per day with a run time around 3:45 Brief status: the pilot was put on hold for an extended period due to uncertainties with the Amsterdam channel terminal. A working group of IM experts was established, that found timetabling constraints in the Channel Tunnel and the mixed traffic section north to Brussels that, under the current timetabling constraints are incompatible with each other.			
7	European Sleeper	Amsterdam-Brussels-Lille-Barcelona	New night train	ProRail, Infrabel, SNCF Réseau, LFPP, ADIF
	Key CM issue / success criteria: have matching path offer from all IMs with realistic travel times (departure early evening, arrival late afternoon), available all year, stable against TCRs Brief status: a working group of IM experts and MoT representatives was set up by European Sleeper. The key issue is finding a suitable route and timetable in France where the high speed network (which can be a medium term option, currently there is no locomotive available with the class B train protection of French HSR) is generally closed at night and extensive TCRs are taking place on the conventional network with a high share of capacity committed via nationally pre-planned freight capacity products..			
8	Trenitalia/DB	Munich – Rome/Milan	New day trains	DB Netz, ÖBB, RFI
	Key CM issue / success criteria: finding fast enough paths for 6h München-Milano and 7:45 München-Rome (with stop in Verona PN)			

Pilot nr.	Applicant	Corridor	Type of service	IMs involved
	Brief status: on the request of the applicant, RNE has set up a round table of IM timetabling experts who shared the expected available capacities and constraints on their network, which are currently being analysed by the applicant. Both services have been announced to start in December 2026.			
9	Iryo	Lisbon – Madrid / A Coruna	New day trains	IP, ADIF
	Key CM issue / success criteria: availability of electrified infrastructure and access to the network in Portugal Brief status: Applicant awaits developments regarding electrification and gauge conversion..			
10	FGC	Barcelona – Toulouse/Montpellier	New day trains	SNCF Réseau, LFPP, ADIF
	Key CM issue / success criteria: to have capacity for 4-4 train pairs for both relations with both with attractive departure times and turnaround times at endpoints that allows them to be operated by 2-2 trainsets per relation Brief status: After the state incumbent operator Renfe announced launching Barcelona-Toulouse trains, the applicant has put the pilot on hold, with the policy objective considered to be fulfilled and concentrated on different business plans.			

RNE next steps to overcome pilot barriers

The European Union aims doubling the passenger volumes of long-distance rail by 2030 and tripling it by 2050 in order to contribute to the climate neutrality of the continent. The EC Passenger Pilots demonstrated that the most relevant entry barrier to the cross-border rail market perceived by a wide cross-section of participating rail operators is rail capacity management, ie. access to train paths that correspond market needs for fast, direct connections across borders. However, having appropriate rail capacities available for cross-border services is complicated due to the many stakeholders involved as capacity allocation remains a national competence.

The European Commission proposal for a new regulation of rail capacity management in Europe intends overcome this by pre-planning of cross-border capacities (under the TTR Timetable Redesign principle) – however, pre-planning demands that there is accurate knowledge present at decision makers about future transport demand, especially the geographic distribution of the market growth foreseen be EU strategies.

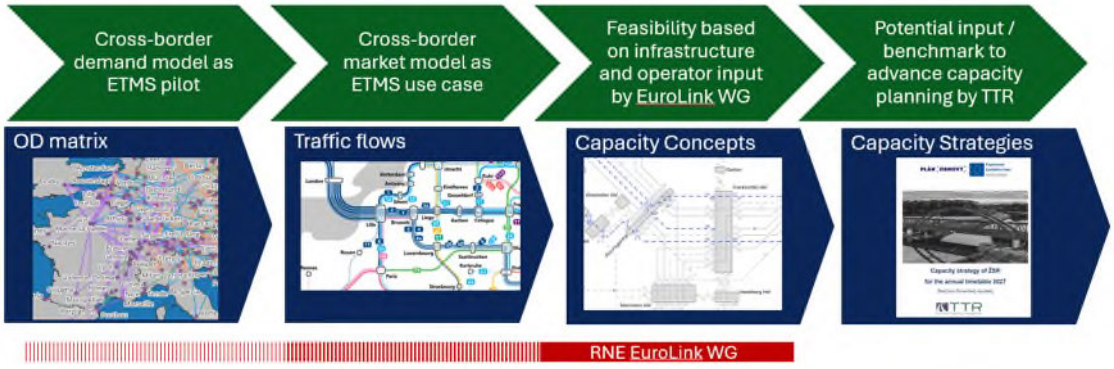
Transport Market Studies are an important tool to gain knowledge of the mobility market. Currently, Rail Freight Corridors (RFC) are required to conduct Transport Market Studies (TMSs) pursuant to the RFC Regulation, but only for freight traffic. The draft Capacity Regulation however proposes that a European Transport Market Study (ETMS) be carried out by the Network Coordinator at regular intervals, covering both passenger and freight with the aim of being a key input to the advance capacity planning process.

Enabled by the CEF Technical Assistance of the European Commission, the first iteration of the ETMS will be carried out by RNE between 2025-2027, focusing on the cross-border/long-distance rail market (including domestic markets relevant for these services), with an emphasis on the growth potential of rail, including modal shift from competing modes. A modelling methodology will be applied that can incorporate optimization for benefits of end users (travel time), operators (operating costs) and society (external costs). Modelling will analyse the behaviour of both the passengers and the operators and translate the origin-

destination demand into flow charts of numbers of trains per day and per relation, without setting an explicit input timetable.

During the implementation of ETMS, continuous consultation and engagement with relevant stakeholders will be undertaken via the RNE EuroLink Working Group and other for a (including the IRP platform), including associations of railway undertakings and other applicants, Member States and European bodies, to promote use of the study results.

Parallel to this, the recently established RNE EuroLink Working Group will be used as a platform of IM timetabling experts to use the outputs of ETMS and establish a Capacity Concept (a non-binding reference scenario of organising cross-border traffic flows in the form of a network of "rough" potential train paths), initially for the reference timeframe 2035, as a framework to:
- check the feasibility of whether pre-planned cross-border capacity volumes can be matched with the market potential of the rail sector.
- suggest train paths for cross-border services that are attractive and adequate for the service envisaged (based on market modelling by ETMS and consulting operators).
- contribute to the proper consideration of the capacity needs for cross-border passenger and freight services in planning processes at national level.



Conclusions

In accordance with the key conclusions from the RNE analysis, the Platform members observed that, although regulatory support for new initiatives can be important, other aspects must be addressed as well in order to facilitate the growth of international rail passenger connections. These include matters such as rolling stock acquisition, capacity allocation, ticketing, the conclusions of the upcoming European Rail Market Study, etc.

Only when barriers across the board are addressed with urgency, the desired uptake of market development can be expected to materialise. The IRP Platform therefore warmly invites the European Commission, RNE and other key stakeholders to discuss the results and findings of the pilot projects.

4.2.2 Governance and capacity allocation

The Platform members are closely following the ongoing exchanges regarding the Regulation on capacity management (proposal COM(2023)443, being discussed in the Council and European Parliament) proposed by the Commission. In general, the member states, as important actors with regard to capacity management strategy, consider the draft Regulation as an important step toward optimal use of the network's capacity.

The Platform members entertained the vision that, with the gradual completion of the TEN-T network, the infrastructure managers' role may slowly evolve from an emphasis on infrastructure development to an emphasis on guaranteeing optimal capacity usage. It was considered that the proposal on capacity management fits within this vision. In light of this, the Platform members expressed their hopes for a speedy agreement on the Regulation on capacity management. Some of the platform members argue against the creation of a lot of new structures and argue that the possibility for delegated acts by the COM should be limited.

4.2.3 Availability of rolling stock

In previous years, the Platform discussed the obstacles for rolling stock projects to mature. Specifically, the members considered that open access projects are disproportionally challenged in this regard as compared to PSO organized projects. The overall large upfront investments required for launching new services often make it difficult for smaller new entrants to arrange for the necessary investment guarantees. An essential issue is that entrants that are not state-owned generally have less favorable credit ratings than the incumbents, that, on the other hand have to follow procurement laws. This – in combination with the high demand for new rolling stock – results in significantly less favorable financing conditions for rolling stock acquisition. Competition law does not remedy this situation. In addition, the lack of interoperability of rolling stock impedes the possibility of reusing the rolling stock elsewhere in case of a failed business case, further complicating the matter.

Although the EU emphasises the legal framework that allows infrastructure access to RUs wanting to operate commercial services, the share of open access projects, compared to PSO organized projects, that successfully attained European Investment Bank (EIB) financing is small. The EIB previously emphasized its openness for discussions with new entrants. However, as rolling stock investments run into hundreds of millions, the bank's rules typically require a strong balance sheet or other form of investment guarantee.

According to the EIB, there is a visible trend on the market for Public Service Contracts, whereby the contracting authority is taking risk related to acquisition of rolling stock, either by purchasing it directly or by publicly owned rolling stock company (who will in turn make it available to competitively selected railway operator), or by offering a redeployment guarantee. The first one is particularly visible in e.g. France, the other one in Germany. The EIB is actively involved in financing such structures and if necessary, offers advice to contracting authorities in structuring such transactions.

This trend is visible also in EIB lending for rolling stock, in the last 2 years, lending to structures / borrowers who were not incumbent rail operators was at 51% (2024) and 74% (2023) of the loan amount signed for EIB rolling stock financing (loans, bonds etc.). The EIB remains interested to consider financially and economically sound operations in the rail

sector and invites potential project promoters to discuss about potential lending as well as advisory services.

Finally, the Platform discussed ideas and opinions with regard to commercial or publicly owned rolling stock leasing companies. The example of Norway was discussed, where state-owned *Norske tog* procures, manages and leases out different types of rolling stock to operators. It was noted that the Norwegian rail market is relatively small, whereas solutions on a European scale can be expected to be more complicated. For international services, specifically, the crucial importance of rail interoperability standards was reaffirmed.

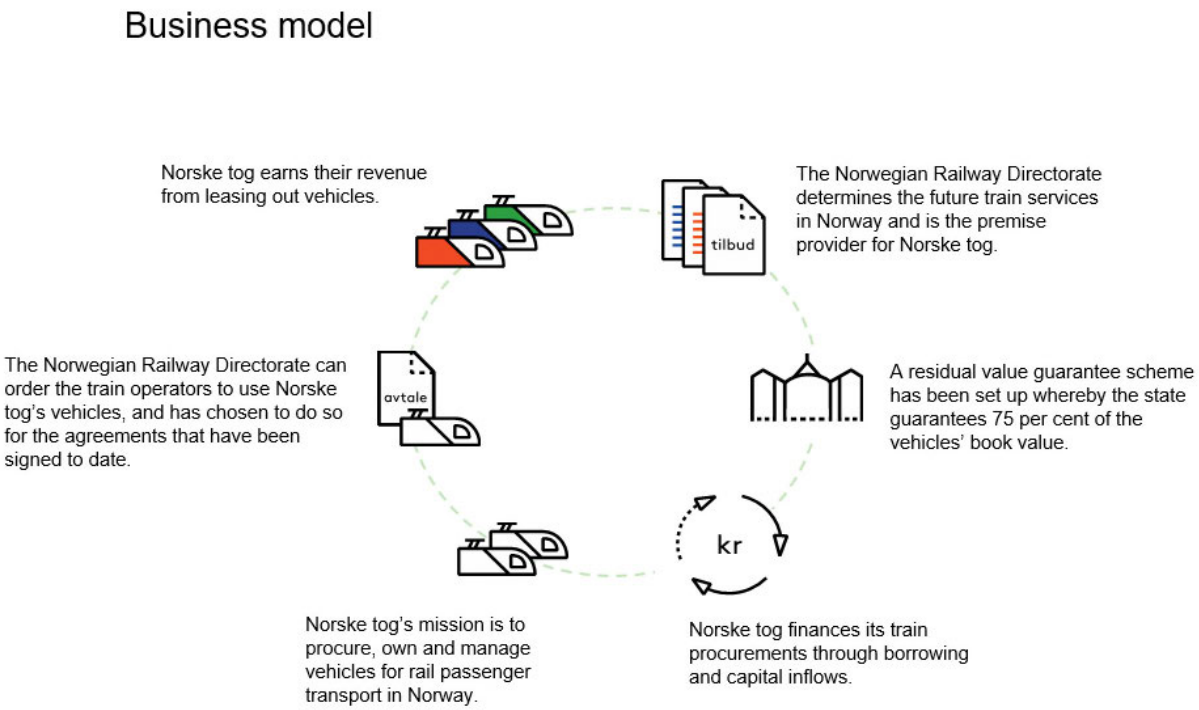


Figure 2. Schematic overview of *Norkse tog*'s business model

4.2.4 High-speed network

The further development of the European high-speed railway network carries considerable potential, especially for direct connections between major population centers. In recent exchanges at European level, an EU masterplan for high-speed rail has been envisaged. High speed rail has developed greatly over the past 30 years, and can be further developed by addressing missing links and bottlenecks. Moreover, development of service levels and competition between rail services is mixed and is relatively lagging behind infrastructure development. In particular for cross-border services the services levels can be increased.

Accelerating cross-border service development face quite some challenges, including:

- Capacity allocation priorities and strategies are coordinated in a limited way cross border;

- Interoperability issues. E.g. different electrification and signalling / ERTMS systems make cross border high-speed rolling stock considerably more expensive. E.g. Amsterdam – Frankfurt - Vienna;
- Infrastructure bottlenecks to increase services levels. E.g. (Schengen / security border) terminal development in Amsterdam Zuid is decisive for additional services to London;
- Market regulation is done predominantly at national level on open access (conditions) and / or public service contracts and market regulatory actions are coordinated in a limited way on a cross border level.

The IRP platform generally supports the launch of an EU masterplan for high-speed rail, in particular concerning cross-border services. The European Union has concentrated its efforts on high-speed in the past 30 years mostly on funding dedicated high speed infrastructure with France, Spain and Italy as mayor examples. The Paris-Brussels – Köln – Amsterdam – London (PBKAL) high speed network is almost an exemption in its cross border character. Growth and further technical integration of the cross-border rail infrastructure is only one part of increasing international connectivity. This work can only be redeemed when the tracks are utilised fully.

For passengers quality and attractiveness of high-speed depends on:

- Train speed;
- Frequencies and connections of train services;
- Price levels;
- Passenger experience (ticketing, comfort, information etc.).

Modal share for rail is on average considerably lower at cross-border level compared to domestic services (app 5 versus 9%, and in peak hours modal share of rail can reach up to 50% for some origin destinations). The fact that modal share for domestic rail and domestic high speed rail is considerably higher than the modal share for cross border (high speed) rail and that is a reason for European action.

In addition to infrastructure development, service frequency (and the related transport capacity) should not be underestimated as a decisive factor for passengers. It has a direct relation with travel time. Also, the EU's efforts should focus on service levels to passengers. Defining an ambition of service provision, hubs and the necessary infrastructure could be further enriched with a governance structure in which MS and IMs coordinate on matters such as capacity, bottlenecks and interoperability.

Table 7. Enhancing the EU's high-speed network: feedback from an EU citizen

Support for the deployment of high-speed trans-European networks should be based on a more comprehensive perspective of strengthening cross-border proximity links (mission links), but also improving links along trans-European corridors, where non-cross-border infrastructure can contribute to improving trans-European links (e.g.: finalisation of the Rhine/Rhône high-speed line, necessary for the Northern Sea/Germany/Mediterranean connections). Operators should also be encouraged to go beyond a often too national view of the traffic potential of the routes. Feedback from Jean-Baptiste Cuzin, EU citizen

4.2.5 Night trains

As the night train market is being revived, it is currently made up of a mixture of commercial and PSO operations and operators. However, all are facing issues related to market access, capacity, availability of rolling stock, certification, and profitably, while the competition is not between RUs but mostly between air and rail. Nevertheless, the quality and number of services are growing: recently new night train rolling stock has been set in service by ÖBB-Personenverkehr AG and new night train services have been launched by European Sleeper.

Specifically, regarding capacity, night trains typically arrive during rush hours, and have specific characteristics (stopping at a limited number of stations, faster than regular trains), making path allocation challenging on the ever more crowded infrastructure. In addition, sleepers require smooth international train paths, unhindered by night track maintenance or customs border stops in the middle of the night. Framework agreements, securing capacity for a long period of time and dedicated night train paths should facilitate the smooth introduction of new services.

In addition, operational costs for night trains are high. Countries such as Belgium put in place mechanisms to compensate the operational costs by reducing track access charges and electricity costs for trains on Belgian territory. Interoperability costs are also striking as multisystem locomotives are not always available, making changes of the locomotives at the border necessary.

PSO contracts could be deployed in order to secure viable business cases, or funding or guarantees for acquiring rolling stock could work as flywheel to start up new services. Finally, as already noted above, the Platform emphasized that high-quality capacity management and cooperation between IMs (such as regarding train paths and track access charges for night trains) do not solely depend on new legislation.

4.2.6 Regulatory framework and competitiveness of the rail sector

As the Platform noted in previous years, disparities regarding competition between rail and other modes, are striking. Often, air can not only outcompete rail with regard to speed, but also on price. This places railways in an uphill battle, as framework conditions are not treated equally. The internalization of external costs is not ensured in an equal manner across competing transport modes. Also, aviation is exempt from VAT by all Member States, whereas rail is subject to VAT on cross-border tickets in a number of member states[4]. In addition to considering these conditions, the alignment with the objectives of the Green Deal means that a lower VAT, fuel tax, carbon emission trading and employment condition treatment should be considered for green transport modes.

[4] With the VAT rates reform that came about with the adoption of Council Directive (EU) 2022/542, Member States have been enabled to apply an exemption with right of deduction (also referred to as a zero rate) to the supply of certain of the goods and services listed in the updated Annex III of the VAT Directive. That includes transport of passengers, as featured in point (5) of the said Annex III while freight transport is not eligible for reduced or zero rate. The use of reduced rates remains optional and it is therefore up to each Member State within the legal framework set by the VAT Directive to decide on the goods or services to which reduced or zero rates are applied. In doing so, Member States must respect the principle of fiscal neutrality, which is inherent in the common system of VAT. According to this principle, which is not affected by the recent reform, similar goods and services, which are in competition with each other, cannot be treated differently for tax purposes.

Moreover, a level playing field is not only relevant for competition between rail and other modes, but also in an intramodal sense. All other transport modes have intramodal competition and thus benefit from innovation and customer choice, whereas new entrant operators in rail still only have between 6-8% market share within the mode. Impartial retail, data sharing and through ticketing, in conformity with the FRAND principles, must therefore be achieved with the greatest urgency. In addition, passenger rights, including for end-to-end journeys, are still a subject for considerable improvement.

4.2.7 Intermodal connectivity

Improving intermodal connectivity is crucial to improve the perceived service level of international rail passenger services and to increase its modal share. The door-to-door connection is more important than the hub to hub connection. The passengers should get seamless connections from the hub by having: integrated ticketing, integrated information flows, integrated physical connections and integrated timetables. Only this integrations will improve the passenger experience significantly. The TEN-T integration with the urban nodes recognized the importance of intermodal connectivity.

4.3 Conclusions

In addition to ticketing and digitalization, the Platform reaffirmed its focus on a number of critical enablers, including:

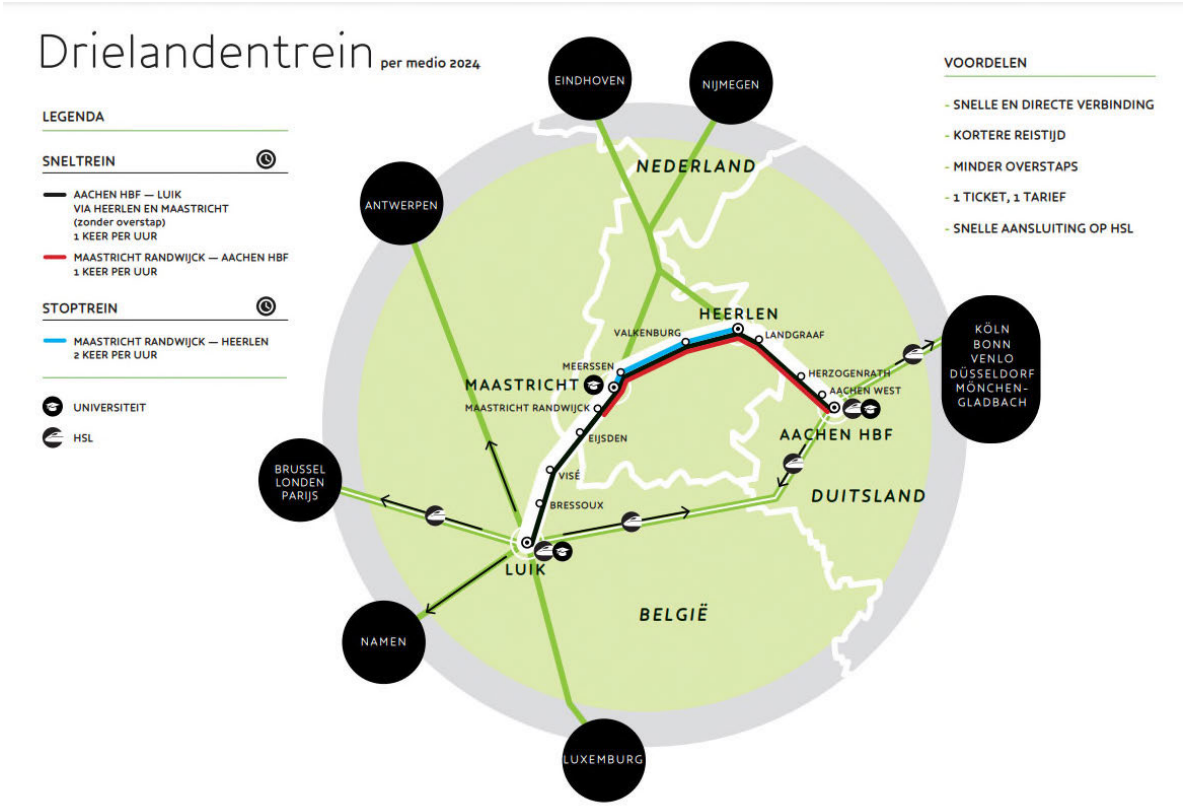
- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- High-speed network
- Night trains
- Regulatory framework and competitiveness of the rail sector
- Intermodal Connectivity

As many of these topics are interdependent, the Platform members emphasized it is crucial that progress continues across the board. Moreover, considerable progress is possible within existing legal frameworks. The Platform therefore made the following recommendations:

- There is a need for all Member States, infrastructure managers, safety authorities and sector parties to improve the international network of rail passenger services through the implementation of the existing legal framework.
- Infrastructure managers, assisted by Member States, should allocate high-quality capacity to (new) international passenger services where possible. In the timetable construction process, international passenger trains, especially night trains, should be given appropriate priority in assigning train paths where possible.
- Intermodal integration, first and foremost in the digital sphere, must be furthered by all parties.

- Financing for rolling stock should be made more accessible, especially for smaller market entrants. Specifically, this topic could be prioritized through the reinforcement of existing financing tools or the next multiannual financial framework (MFF).
- There is a need to harmonize documents that are required by different countries for railway vehicles. Rolling stock cannot be operated all over Europe due to different national requirements for rolling stock leading to funding risks and cost increases.
- Infrastructure managers, assisted by Member States, should do their utmost to facilitate night trains, helping to ensure viable train paths and infrastructure charging.
- All parties should endeavor to advance intra-modal competition conditions, based on the FRAND principles.

Table 8. Best Practice – Three country railway service Liege – Maastricht – Aachen



Intro
The long-awaited Three-Country Train started services from June 2024. This train connects the cities of Liege, Maastricht, Heerlen and Aachen, offering the passengers a direct connection between three countries: Germany, the Netherlands and Belgium. An hourly service is provided in both directions.

Previous situation
Previously, passengers had to make a stop over in Maastricht between Aachen and Liège. The service between Maastricht and Liège was run by NMBS, whereas Arriva was running the service between Maastricht and Aachen. Both under different concessions.

How is it organised
The Three Country Train is part of the public transport concession(s) that Arriva operates under concession contract of the Province of Limburg (NL) and go.Rheinland (DE). For the section of the route between Maastricht and Liege, Arriva sought cooperation with NS and NMBS as the service between Maastricht and Liège is within the NMBS national concession, and was run in cooperation with NS. This complexity led to an agreement where Arriva organises the service, but on the Belgian side NMBS is running the service, using the Arriva rolling stock. Therefore, the Dutch Arriva train drivers hand over the train to Belgian train drivers as NMBS takes over the trains from the Dutch-Belgian border (NMBS withdrew its service Liège – Maastricht from the moment Arriva took over, and at that moment also the NS involvement ended).

Issues to overcome
It took 8 years of preparations: the railway track at some sections had to be electrified and at some sections extended. The safety system in the trains had to be extended with ECTS to comply with the Belgian rail safety system and the train was adapted to cover the three different electrification systems. The ticketing system is integrated: a single ticket (Euregioticket) serves the full service between the three countries. The national ticketing systems are not yet valid on this cross-border service. To make the service happen many stakeholders had to cooperate: the Belgian government and federal services, NMBS and Infrabel; Nahverkehr Rheinland and the Aachener Verkehrsverbund; and the Dutch ministry of Transport, the Province of Limburg, Arriva, NS, and ProRail.

Financials
The service is part of two bigger concessions: the PT concession for the Province of Limburg and the NMBS concession for Belgium. The PSO support for 1 service cannot be distracted from the total support Arriva receives for all bus and train services in then Province of Limburg. Before starting the service, Arriva also received a Dutch subsidy for installing ECTS on the trains.

5 Monitoring the development of international railway passenger transport

5.1 Introduction

Since the start of the Platform in 2020, progress was made in a number of relevant fields, laying the groundwork with regard to enhanced, concerted efforts by the Member States to contribute to improving international railway passenger transport. In light of this ongoing process, the Member States required a means to estimate the impact of the efforts of the IRP and other stakeholders. In order to allow for an understanding of the development of the market and network, last year's integrated progress report included the results of the second, expanded, iteration. The present progress report brings the results of the third monitoring iteration.

The monitoring is based on a detailed survey, which was spread among the MS and sector parties, allowing us to collect high-quality, up to date data. The results displayed in the following paragraphs therefore provide for an accurate overview.

5.2 Methodology

A survey was used for the data collection of the monitoring of international train services. All Member States were asked to fill in a survey where they indicated the different international trains operating in their country. The survey also asked more information on the service, such as the type of service, type of contracting, frequency, and the capacity of the train service. After the collection of the surveys, the data was cleaned by quality checking the entries and the removal of duplications (e.g. Amsterdam-London train was reported by 4 different Member States: Netherlands, Belgium, France and the UK). Train services were, for analytical purposes, only allocated to the origin country and the destination country. Trains going via a certain country are not reflected in the country overviews in this report. Origin and destination of a train services were based on alphabetic order (e.g. Berlin-Paris trains service has Berlin as origin because of working in alphabetic order). After the categorization of the data, several cross-tables between the different parameters were made. The results of the analysis are reflected in the next paragraph.

5.3 Descriptive results

During the typical working day, the European Union, Switzerland, Norway and the United Kingdom are now served by some 479 international railway passenger services (train pairs), an increase of 43 services compared to last year. Regional cross-border connections total over 165, with an average frequency of 8 (unidirectional). On top of this, almost 170 direct intercity services are operated, with an average 4 daily trips. High-speed services count a total of 83, on average offering 4 trains per day. Finally, 61 night train connections are available. Together, these services make up for a total of 2.392 train pairs per day: an increase of some 400 train pairs per day compared to the previous year. Among many origins and destinations throughout Europe, the number of direct connections between capital cities amounts to 45. These key facts are shown in the table below:

Table 9. Key monitoring figures 2025 (EU + Norway, UK, Switzerland)

Type of train	Regional	Long-distance	High-speed	Night train
Connections Europe	168	157	86	67
Average daily	7.48	2.67	3.65	0,95
Aggregate	1256	419	3313	64
Trains total	2052			
Capital-to-capital connections	45			

The increase is explained twofold: Firstly more international passenger trains are added to the services. As shown in the paragraph 2.3 numerous operators introduced new international services from the mentioned countries. Secondly the refined monitoring system showed more services as well; this has to do with more accurate reporting from the MS but also on the counting methodology.

There was approximately a 7% increase in the total number of trains from 2024 to 2025. For high-speed train services, we see an increase of 18%. The increase in high-speed trains is due to the introduction of 7 new high-speed routes in 2025. In addition, some routes were converted from long-distance to high-speed ones. For long-distance train services, there is a slight decrease of 3%, which means the service has remained at approximately the same level. For night train services, with an increase of 16%, we see 5 new night train services showing up. Aside from minor changes, no clear developments were indicated in the surveys. For regional trains, we observe an increase of 10%, with a small increase in numbers for Germany <-> Poland and France <-> Switzerland.

The monitor provides an overview of international rail passenger services on a *daily origin-departure* basis—that is, it counts how many cross-border passenger trains leave each country on an average calendar day. Its core dataset comes from an annual, harmonised survey completed by every Member State (plus the UK, Norway and Switzerland), in which each authority reports the number of outward and return ("retour") cross-border trains that start in its territory. Only two data sources are used: (i) the Member-State survey returns, and (ii) the official public timetables valid for the 2024/25 timetable year.

Methodology:
All reported trains are given a unique service ID and matched with their schedule in the public timetable. A rule-based script then classifies each service as Regional, Long-distance (IC), High-speed, or Night train. In Excel data analysis the survey and timetable data were merged, duplicates removed, and pivot tables were made, so that every train is counted once — where the locations of origin and destination were sorted alphabetically. Our first step was data cleaning, preparing the collected survey data for analysis by deleting or modifying incorrect, incomplete, irrelevant, duplicated or incorrectly specified data. For example, there were three ways of naming Cologne in the data: Cologne, Köln Hbf and Köln. In our analysis, the three entries were treated as one location. Day-of-week patterns are converted into "average departures per calendar day" and multiplied by 365 for yearly aggregates. Seating capacity, where provided in the survey, is multiplied by the calculated frequency to give daily capacity figures. The resulting tables feed directly into the report. Country totals are calculated based on the origin of the train service. For example, the train service between Amsterdam and Paris, and vice versa, passing through Belgium, is counted as one train originating from the Netherlands. This approach prevents double-counting across the dataset, so each cross-border service is recorded once—and only once—even though the national figures will therefore be lower than those reported domestically.

The table below provides a breakdown of international train connections from various European countries, classified by train type: High Speed (HS), Long distance, Night trains, and Regional[1]. Germany leads with a total of 167 connections, divided equally between HS/InterCity trains and Regional trains. Germany also is home to the largest amount of destinations for night trains (19). Austria operates nearly as many international train services (138) as Germany. Half of Austrian's international trains are long-distance. Poland is listed in the third position with 81 international trains, half of which are half regional trains. France and Switzerland are major hubs for high-speed trains: more than half of their international services are high speed. Smaller countries like Latvia and Lithuania have minimal connections, with Latvia only having one InterCity connection. Although countries like Belgium and Luxembourg have a medium amount of international train connections, the connections are on average among the most frequent in Europe. Also Denmark and Sweden have very frequent international trains, this can be explained by the frequent Oresund Tag between Copenhagen and Malmö.

Table 10. Number of services per country and average frequency for all trains per day

	HS	IC	NT	RG	Total	Freq
Austria	14	64	17	54	149	4,8
Belgium	10	7	4	9	30	4,1
Bulgaria	0	4	1	2	7	1
Croatia	0	4	7	13	24	1,4
Czech Republic	1	21	12	27	61	4,2
Denmark	0	3	0	6	9	12,7
Estonia	0	0	0	0	0	0
Finland	0	0	0	0	0	0
France	29	6	2	24	61	5,1
Germany	46	57	21	46	170	5
Greece	0	0	0	1	1	0,3
Hungary	2	23	11	23	59	2,9
Republic of Ireland	0	1	0	0	1	15
Italy	13	17	8	17	55	2.6
Latvia	0	1	0	0	1	1
Lithuania	0	2	0	0	2	4,2
Luxembourg	3	7	0	4	14	13
Netherlands	7	3	4	5	19	8,5
Norway	0	2	1	4	7	6
Poland	0	27	17	35	79	3,7
Portugal	0	1	0	1	2	2
Romania	0	15	3	6	23	1,5
Slovakia	2	11	5	16	34	3
Slovenia	0	7	1	15	23	1,7
Spain	3	1	0	5	9	5,6
Sweden	0	3	3	6	12	7,9
Switzerland	37	18	8	13	76	3,2
England	5	0	0	0	5	9

[1] Side note: countries have interpretated the classification between HS and IC differently

International trains have the capacity to transport some 646 thousand people per day. High-speed trains in Europe have on average the highest capacity per train. However, regional trains transfer most passengers per day. The high frequency of regional services enables this type of services to transfer most passengers. Night-trains have on average the lowest capacity. Lower capacity on night trains is caused by the relatively large space per passenger (availability of beds). Based on these numbers, and assuming 300 operational days per year, international trains have the capacity to transport over 193 million passengers per year.

Table 11. Capacity per type of services

Row Labels	**Sum of Frequency (day)**	**Average of Capacity per train (max. number of passengers)**	Total capacity per day
High-speed train	292	618	180,456
IC	407	303	123,133
Night train	62	282	17,393
Regional	1099	228	250,456
Grand Total	**1860**	**274**	509,162

More than two-third of the international rail services in Europe are still Public Service Obligation (69%). However, recent efforts for more competition have resulted in a 26% share for Open Access services.

Table 12. Shares of PSO and open access

Type of Contract	Count	%
PSO	145	68%
Hybrid	3	2%
Open Access	55	27%
Other	8	4%
Total	211	100%

Open access trains are running on open access can be either incumbents (state owned) or private operators.

Table 13 outlines the planned or expanded international train connections in several countries (these numbers do not only include new connections but also expanded existing connections). The total number of connections currently foreseen for the next decade is 48, with intercities trains (31) being the most prominent and night trains (8) , regional (8) and high-speed trains (9) more or less equally developped. Italy is the main contributor with 6 new international train services. Italy is closely followed by Denmark (4 planned trains and 4 in more conceptual stage), these trains want to benefit from a new tunnel between Denmark and Germany. The other countries show limited increase.

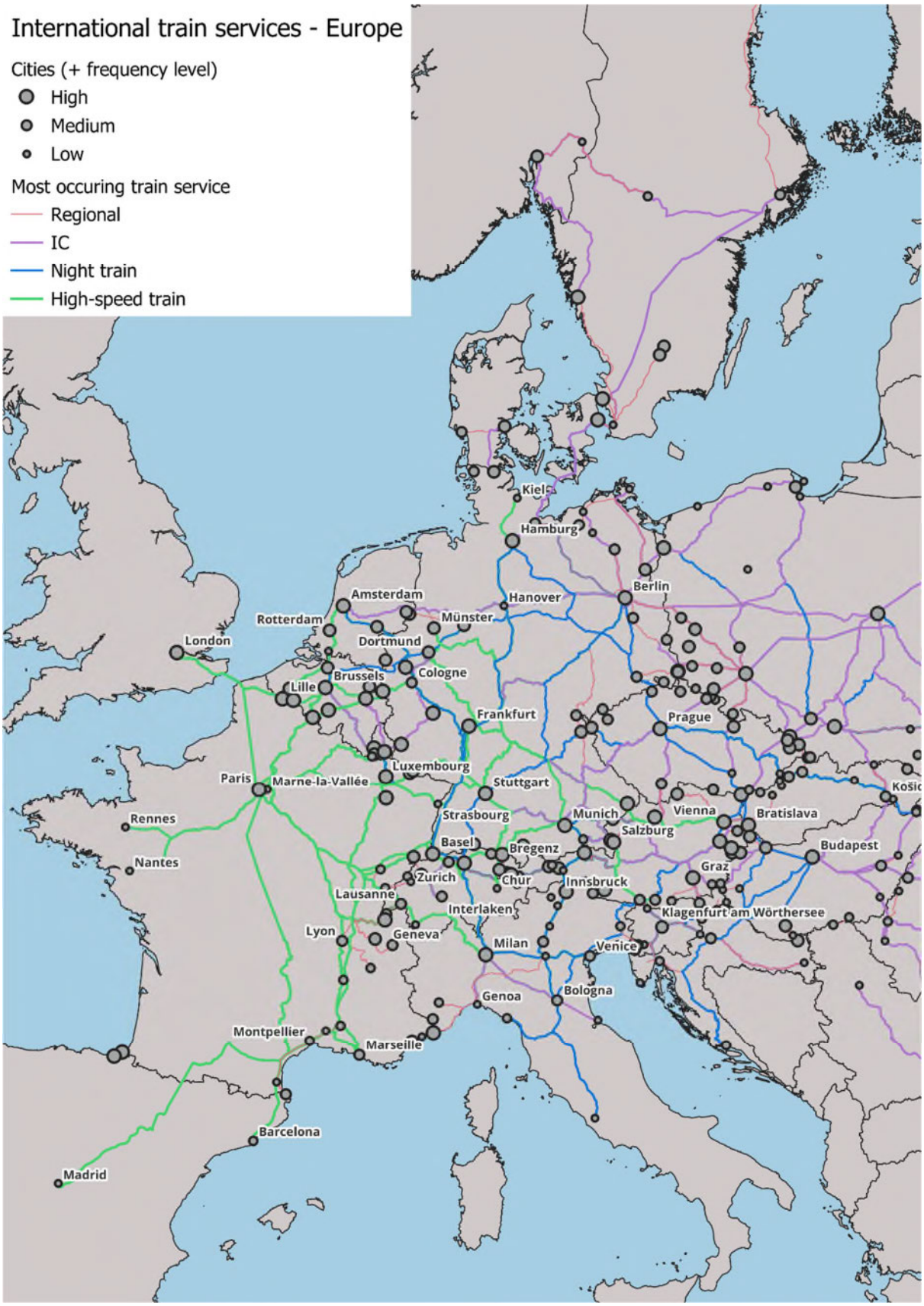
Last year 67 new or expanded international services were foreseen. Most likely the reduction derives from the fact that in last years overview Croatia had plans for 16 new services, and in this years servey no new services were foreseen.

Table 13. Future international rail services

MS / year of introduction new service	HS	IC	Night train	Regional	Total
2025	**2**	**6**	**2**	**5**	**15**
Switzerland	1				1
France	1				1
Slovenia		4		4	8
Latvia		1			1
Czech Republic		1	1		2
Portugal			1		1
Netherlands				1	1
2026	**6**	**11**	**2**	**1**	**20**
Denmark		3			3
France		1			1
Hungary		4			4
Netherlands				1	1
Norway		2	1		3
Czech Republic		1			1
Belgium			1		1
Italy	6				6
2027		**5**			**5**
Denmark		4			4
Netherlands		1			1
2029		**4**	**2**	**1**	**7**
Denmark		4	2	1	7
TBD	**1**	**5**	**2**	**1**	**9**
Norway			1		1
Slovakia		1			1
United Kingdom	1				1
Luxembourg		2	1		3
Romania				1	1
Portugal		2			2

5.4 Mapping of international rail passenger connections

The train services have been visualized on several maps of Europe as displayed below. The first map shows an overview of Europe with the major cities, subsequent maps each zoom in on a particular part of the continent, and show all cities that occur in the data, either as an origin or a destination. For each train service, a line is drawn as the crow flies between the origin and destination, coloured according to the train type that occurs most often on that OD-pair. The width of the line varies with the total number of trains per day (across all train types).


International train services - Europe
Cities (+ frequency level)
High
Medium
Low
Most occuring train service
Regional
IC
Night train
High-speed train
Kiel
Hamburg
Berlin
Amsterdam
Hanover
Rotterdam
Münster
London
Dortmund
Brussels
Cologne
Lille
Frankfurt
Prague
Luxembourg
Paris
Marne-la-Vallée
Stuttgart
Rennes
Strasbourg
Munich
Vienna
Bratislava
Salzburg
Basel
Bregenz
Budapest
Nantes
Graz
Zurich
Chur
Innsbruck
Lausanne
Interlaken
Klagenfurt am Wörthersee
Lyon
Geneva
Milan
Venice
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Bologna
Montpellier
Marseille
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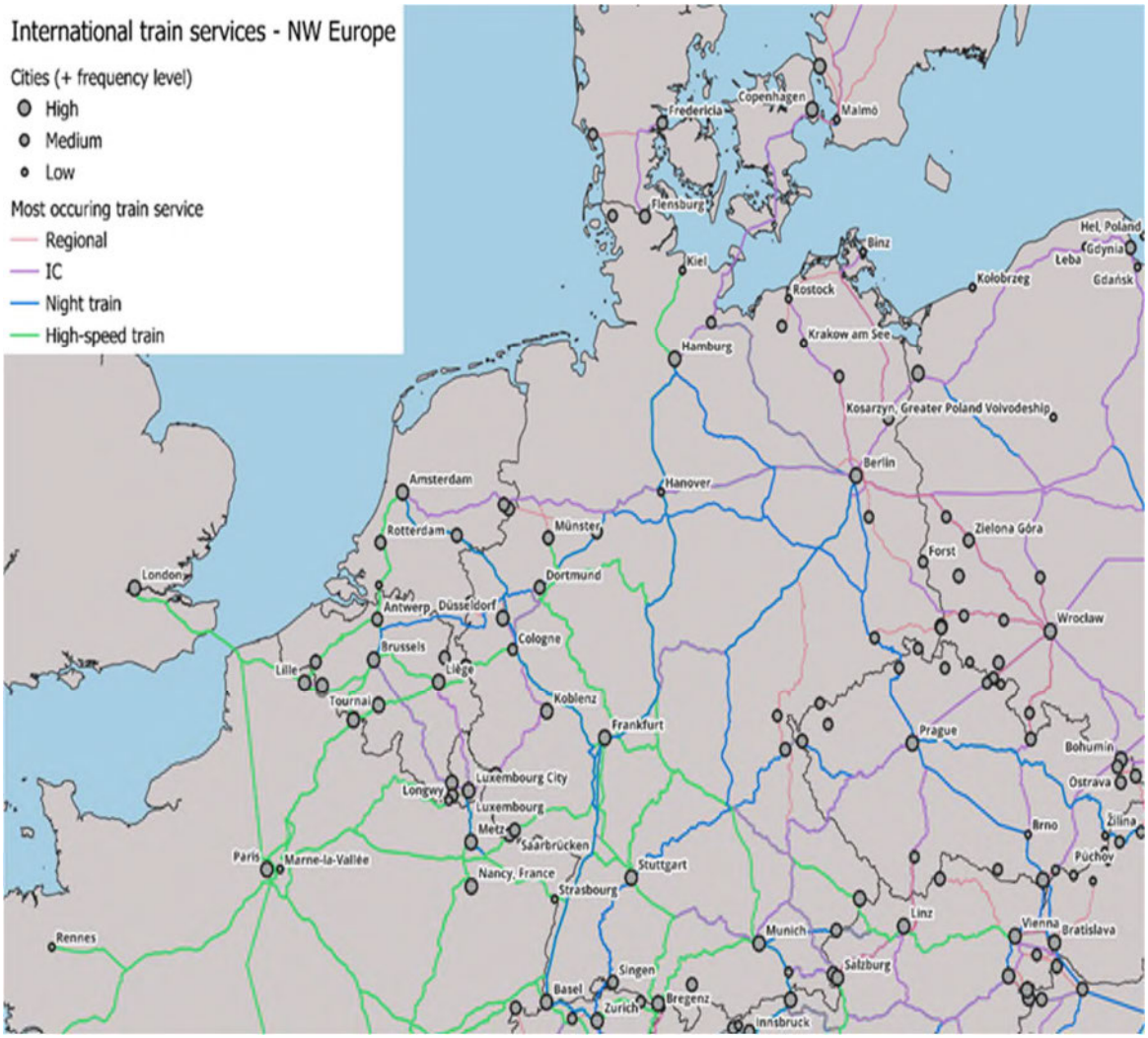
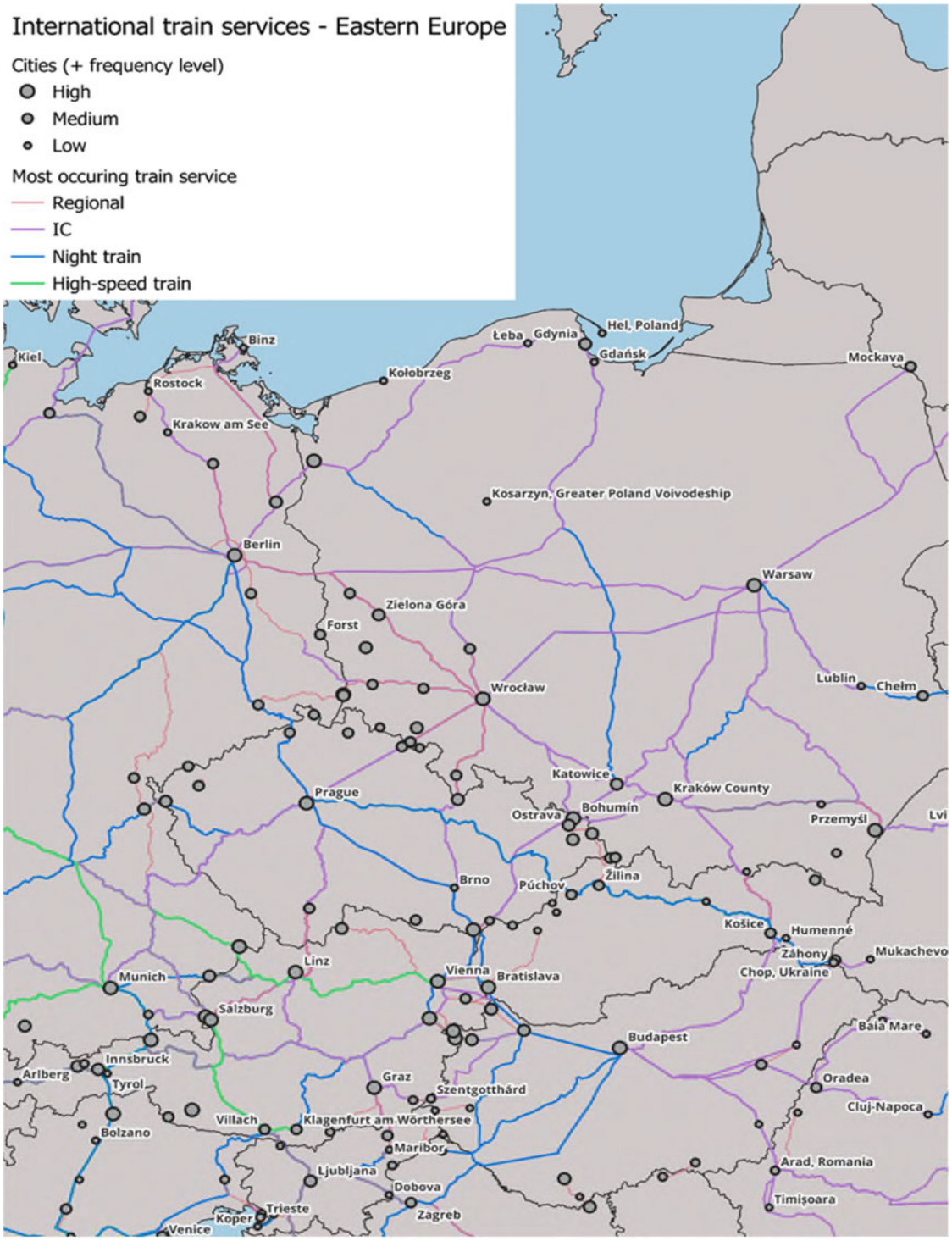

International train services - NW Europe
Cities (+ frequency level)
High
Medium
Low
Most occuring train service
Regional
IC
Night train
High-speed train
Copenhagen
Malmö
Fredericia
Flensburg
Kiel
Hamburg
Rostock
Binz
Hel, Poland
Gdynia
Leba
Gdańsk
Kołobrzeg
Krakow am See
Kosarzyn, Greater Poland Volvodeship
Berlin
Hanover
Amsterdam
Rotterdam
Münster
Dortmund
Zielona Góra
Forst
Wrocław
London
Antwerp
Düsseldorf
Cologne
Brussels
Liège
Lille
Tournai
Koblenz
Frankfurt
Prague
Bohumín
Ostrava
Žilina
Brno
Púchov
Luxembourg City
Longwy
Luxembourg
Metz
Saarbrücken
Paris
Marne-la-Vallée
Nancy, France
Strasbourg
Stuttgart
Linz
Vienna
Bratislava
Munich
Salzburg
Rennes
Singen
Basel
Zurich
Bregenz
Innsbruck


International train services - Eastern Europe
Cities (+ frequency level)
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Most occuring train service
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High-speed train
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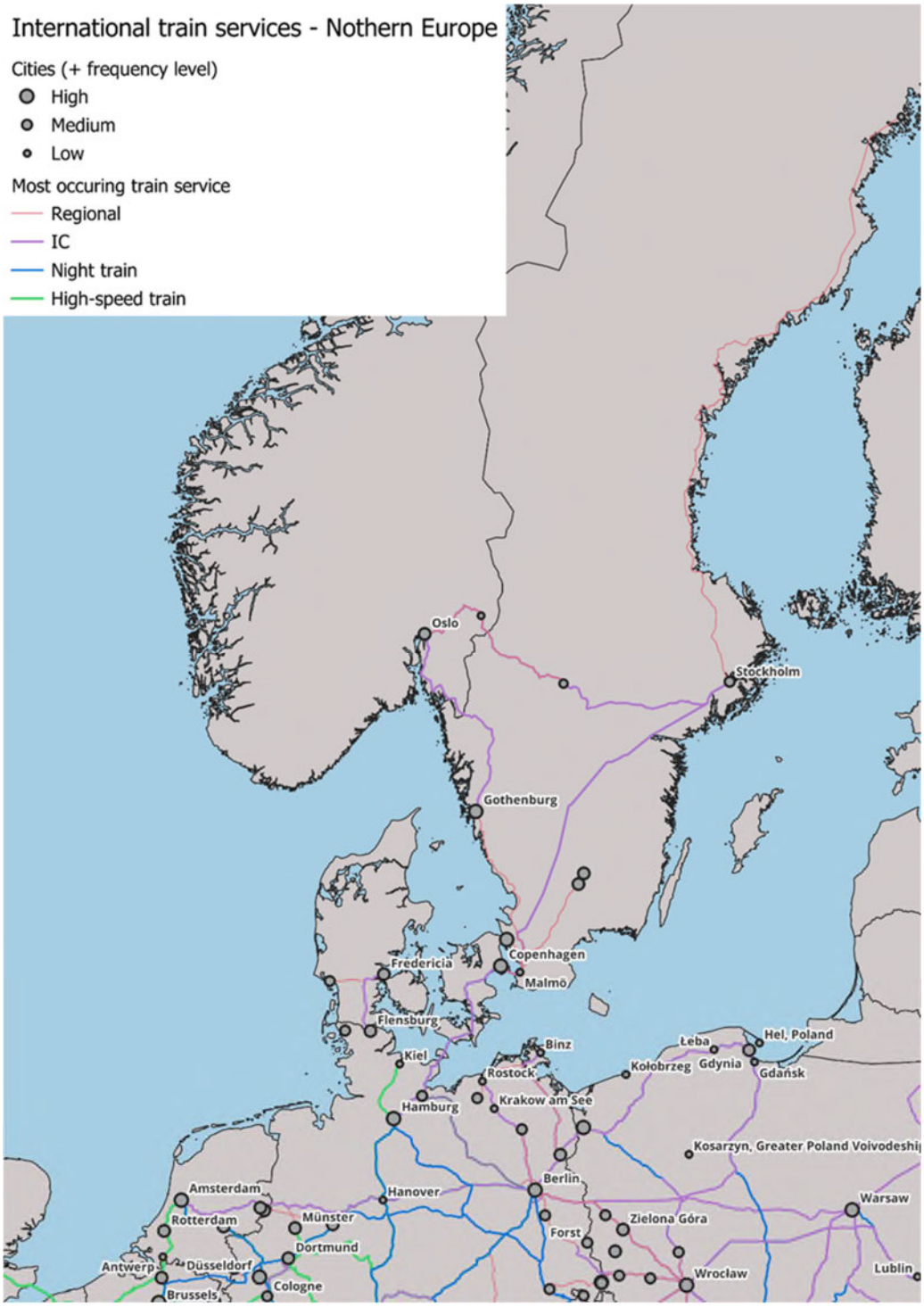
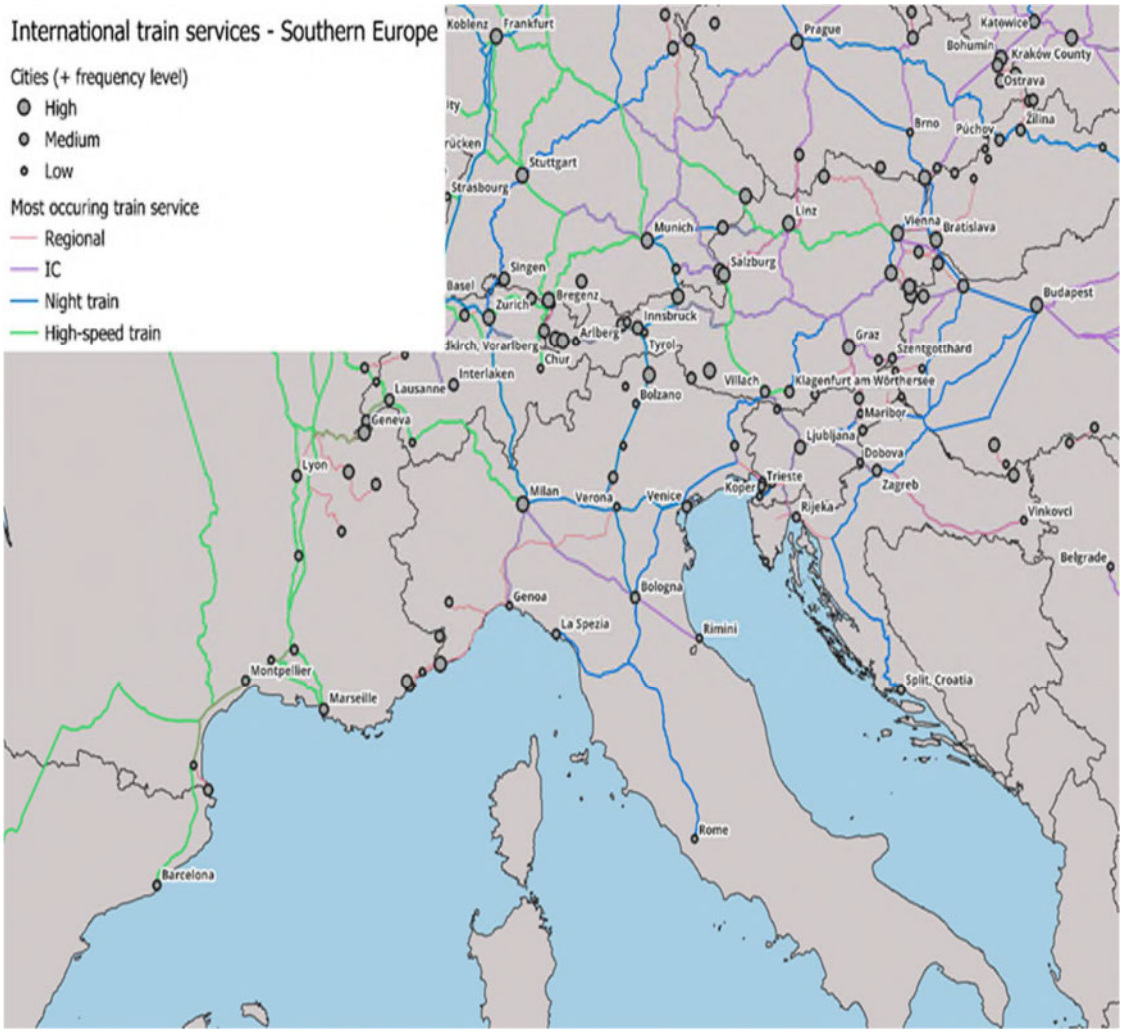
Rostock
Krakow am See
Kołobrzeg
Łeba
Gdynia
Hel, Poland
Gdańsk
Mockava
Kosarzyn, Greater Poland Voivodeship
Berlin
Warsaw
Zielona Góra
Forst
Wrocław
Lublin
Chełm
Katowice
Kraków County
Prague
Ostrava
Bohumín
Przemyśl
Lvi
Brno
Púchov
Žilina
Košice
Humenné
Záhony
Mukachevo
Chop, Ukraine
Linz
Munich
Vienna
Bratislava
Salzburg
Budapest
Baia Mare
Innsbruck
Arlberg
Tyrol
Graz
Szentgotthárd
Oradea
Cluj-Napoca
Villach
Klagenfurt am Wörthersee
Bolzano
Maribor
Ljubljana
Arad, Romania
Dobova
Timişoara
Trieste
Koper
Zagreb
Venice


International train services - Nothern Europe
Cities (+ frequency level)
High
Medium
Low
Most occuring train service
Regional
IC
Night train
High-speed train
Oslo
Stockholm
Gothenburg
Copenhagen
Fredericia
Malmö
Flensburg
Kiel
Binz
Rostock
Hamburg
Krakow am See
Łeba
Hel, Poland
Kołobrzeg
Gdynia
Gdańsk
Kosarzyn, Greater Poland Voivodeshi
Berlin
Amsterdam
Hanover
Rotterdam
Münster
Dortmund
Antwerp
Düsseldorf
Cologne
Brussels
Forst
Zielona Góra
Warsaw
Wrocław
Lublin


International train services - Southern Europe
Cities (+ frequency level)
High
Medium
Low
Most occuring train service
Regional
IC
Night train
High-speed train
Koblenz
Frankfurt
Prague
Katowice
Bohumin
Kraków County
Ostrava
Žilina
Brno
Púchov
Stuttgart
Strasbourg
Linz
Vienna
Bratislava
Munich
Salzburg
Singen
Basel
Zurich
Bregenz
Innsbruck
Arlberg
Tyrol
Chur
Budapest
Graz
Szentgotthard
Interlaken
Lausanne
Geneva
Bolzano
Villach
Klagenfurt am Wörthersee
Maribor
Ljubljana
Dobova
Zagreb
Lyon
Milan
Verona
Venice
Koper
Trieste
Rijeka
Vinkovci
Belgrade
Bologna
Genoa
La Spezia
Rimini
Montpellier
Marseille
Split, Croatia
Rome
Barcelona


Brno
Púchov
Žilina
Košice
Humenné
Mukachevo
Záhony
Chop, Ukraine
Munich
Linz
Vienna
Bratislava
Salzburg
Budapest
Baia Mare
Innsbruck
Arlberg
Tyrol
Graz
Szentgotthárd
Oradea
Chișinău
Cluj-Napoca
Villach
Klagenfurt am Wörthersee
Bolzano
Maribor
Odesa
Ljubljana
Arad, Romania
Târgu Mureș
Dobova
Timișoara
Trieste
Koper
Zagreb
Brașov
Verona
Rijeka
Venice
Vinkovci
Belgrade
Bologna
Craiova
Bucharest
Rimini
Ruse, Bulgaria
Split, Croatia
Varna, Bulgaria
Sofia
Istanbul
International train services - Southern Europe
Cities (+ frequency level)
High
Medium
Low
Most occuring train service
Regional
IC
Night train
High-speed train

6

Future of the IRP platform

6.1 Facilitating consultations

Over the past five years, the IRP platform has contributed to the expansion and improvement of international railway passenger services in various ways. The platform was successful in further raising awareness of the subject's urgency. Also, the much needed discussions among the member states, between the member states and the European institutions, and between the member states and national and European sector parties, were facilitated.

Through multiple exchanges and reporting cycles, an overall more thorough understanding of the topic and its intricacies was reached. A key finding, reflected in the present as well as in previous integrated progress reports, was that facilitating further growth of the international rail passenger market requires actively addressing multiple barriers in parallel.

In spite of the positive market developments and important efforts by all relevant parties noted in this report, the IRP platform considers that the nature and persistence of the challenges remaining necessitate ongoing consultations. The members therefore recommend a continuation of the platform for another five years. The IRP's goals, activities and working procedures may therefore be redefined through the drafting of renewed terms of reference.

6.2 Monitoring

In addition, the IRP platform succeeded in delivering comprehensive market monitoring, the third iteration of which is found in this report. Previously, these crucial monitoring data had not been compiled or made publicly available. It is vital that the monitoring exercise is continued on a regular basis as each new year increases the explanatory value of the dataset (eg. by assessing trends), possibly with further streamlining of data collection and improvements in output visualisation.

In the following years, the monitoring could be further consolidated, possibly with streamlined data collection and interactive visualisations. A conceptual methodology for this is found in the annex 2 of this report.

7 Conclusions and recommendations

In this progress report, the IRP laid emphasis on market monitoring and on the crucial discussion pertaining to customer experience and digitalisation. In addition, a number of other critical enablers is discussed, and the results of a renewed monitoring exercise are brought forward.

The ongoing development and implementation of common data standards are vital steps that must continue without delay. The Platform recognised the sector's efforts in developing common standards, but noted that key areas of disagreement within the sector continue to exist and noted that a number of the significant first phase objectives set out in CER's Ticketing Roadmap for 2025 had still to be delivered. Specifically, it was observed that conformity with the FRAND principles still falls short, and that the identified shortfalls are not primarily technical. Regardless of the standard used, a state of affairs where the incumbent operators exclusively sell their own tickets and those of their cross-border counterparts, can be expected to continue to limit the uptake of open access services and frustrate the rail sectors' ambition to develop as the backbone of a sustainable European transport system. The platform recognised the issue as existential and therefore recommends that this concern is addressed progressively and with the public interest as the guiding principle.

The Platform considered that ongoing work on the MDMS regulation may come a long way in addressing these requirements. However, it emphasized that the urgency of providing more and better international services dictates that regulatory discussions should not negatively impact the work on technical solutions. In a similar vein, while the continuous exchange within the rail sector focussing on international services is highly important, the multimodal aspects in context of the MDMS discussion should also be duly addressed.

Modal shift towards international railway passenger transportation is crucial. Next to customer experience and digitalization, the Platform therefore considered an array of critical enablers, including:

- Completing the TEN-T infrastructure network
- Technical interoperability
- Governance and capacity allocation
- Intermodal connectivity
- Availability of rolling stock
- Night trains
- Regulatory framework and competitiveness of the rail sector
- Intermodal connectivity.

The monitoring results presented in this report showed that during the typical working day, the European Union, Switzerland, Norway and the United Kingdom are now served by some 460 international railway passenger services, an increase of 24 services compared to last year. Regional cross-border connections total over 165, with an average frequency of 8 (unidirectional). On top of this, almost 170 direct intercity services are operated, with an average 4 daily trips. High-speed services count a total of 70, on average offering 4 trains per day. Finally, 57 night train connections are available. Together, these services make up for a total of 2.326 trains per day: an increase of some 400 trains per day compared to

the previous year. Among many origins and destinations throughout Europe, the number of direct connections between capital cities amounts to 46.

International train services currently offer capacity for some 630 thousand people per day. Based on 300 operational days per year, the annual capacity of over 189 million passengers can be called significant. With average capacity of some 400 persons per train, especially high-speed services seem to offer large future potential.

As many of these topics are interdependent, the Platform members emphasized it is crucial that progress continues across the board. Moreover, considerable progress is possible within existing legal frameworks. The Platform therefore made a number of recommendations:

- There is a need for all Member States, infrastructure managers, safety authorities and sector parties to improve the international network of rail passenger services through the implementation of the existing legal framework.
- Infrastructure managers, assisted by Member States, should allocate high-quality capacity to (new) international passenger services where possible. In the timetable construction process, international passenger trains, especially night trains, should be given appropriate priority in assigning train paths where possible.
- Intermodal integration, first and foremost in the digital sphere, must be furthered by all parties.
- Financing for rolling stock should be made more accessible, especially for smaller market entrants. Specifically, this topic could be prioritized through the reinforcement of existing financing tools or the next MFF.
- There is a need to harmonize documents that are required by different countries for railway vehicles. Rolling stock cannot be operated all over Europe due to different national requirements for rolling stock leading to funding risks and cost increases.
- Infrastructure managers, assisted by Member States, should do their utmost to facilitate night trains, helping to ensure viable train paths and infrastructure charging.
- All parties should endeavor to advance intra-modal competition conditions, based on the FRAND principles.

Annex 1 – Sector Mirror Group

SECTOR STATEMENT for the Progress Report of the IRP

1. The Sector Mirror Group (SMG) appreciates the work what has been done by the International Rail Passenger Platform (IRP) to improve and increase international rail train transport. Ministries have played a pivotal role and should continue to do so in the coming years. As SMG, we believe that the IRP can continue to play an instrumental role in the coordination between the member states and the sector. The rail operators in the SMG would like to take a proactive approach and have submitted a proposal for the future of IRP and for the launch of a so-called 'Sector Delivery Group' in the last IRP meeting in Vienna.
2. The Group has long recognised the need to provide rail's potential customers with easy access to simple, reliable, and comprehensive information, the status quo not being an acceptable option. It acknowledges the existence of different views as to the implementation and further development of ongoing sector-based initiatives such as Open Sales Distribution Model (OSDM). As the Sector Mirror Group reported to Ministers in 2021, whatever the system eventually chosen at European level, it must ensure transparency and enable a level playing field between Railway Undertakings and third-party vendors for selling tickets on fair, reasonable and non-discriminatory commercial principles. We look to a system that is capable of displaying all trains and all prices together with relevant information (such as the potential for reservations, connections and accommodation of the needs of PRMs and the demands of transmodal journey planning). We look forward to the development of more rail-through tickets and promote the use and awareness of journey continuation agreements with all the rail sector actors, which assist passengers who have missed a connection due to delay or cancellation of the previous train, and to stronger cooperation with the air sector with the aim of integrating air-rail journeys and promoting rail as an attractive low-carbon alternative for many journeys.
3. The sector is worried about the lack of investments in infrastructure. Long-term investment planning and coordinated infrastructure maintenance and development are needed to provide high quality international rail passenger services all over Europe. A stable and long-term financial framework is key for the railway industry in this regard. It is essential to speed up the implementation of cross-border infrastructure projects by making use of the existing financial tools and incentives.
4. The sector sees the need for more investment in rolling stock which is able to run cross border services. Public investment into consistent deployment of ERTMS and involvement into de-risking financing of long distance interoperable rolling stock, for example by offering guarantees to the whole sector in an impartial manner, is essential to realise international rail passenger services.

The sector should strengthen its collective voice and coordinate efforts with other organizations that share an interest in advancing international train services, to ensure their views and priorities are effectively represented in relevant discussions and policymaking. We will continue the discussion within on how to do so over the summer, based on the proposal launched in Vienna.

Christopher Irwin (EPF) & Alberto Mazzola (CER),
Co-chairs of the Sector Stakeholders' Mirror Group.

Annex 2 – Monitoring Scheme 2026

Federal Ministry
Innovation, Mobility
and Infrastructure
Republic of Austria

Monitoring Scheme 2026

International Rail Passenger Transport

A future monitoring scheme for international railway passenger transport (IRP) should focus on the development and tracking service availability, capacity utilization, and customer experience while addressing barriers like interoperability and funding. Key components include annual data collection via surveys, automated tools, and public repositories; mapping and visualization through GIS; and regular progress reporting. Strategic priorities include expanding cross-border connections, improving night train services, enhancing ticketing systems, and measuring environmental impact. Collaboration among national, regional, and EU-level stakeholders is essential for driving a sustainable modal shift to rail.

1. Key Objectives, Purpose and Scope of Monitoring

- Redo the 2024 assessment, iterative track progress in expanding international railway connections.
- Yearly comparison of existing international services. Begins with the comparison of the timetable 2024/2025 and the IRP report from June 2024.
- Changes (tbd. exactly which changes) in service level over past year.
- Provide stakeholders with actionable insights for decision-making (for every case).
- Ensure alignment with existing EU regulations (e.g., SERA, Land Transport Directive, and Railway Interoperability Directive).
- Define key benchmarks and expected outcomes.

2. Core Components of the Monitoring Framework

Data Collection and Sources

- Surveys: Distribute predefined detailed annual surveys to Member States, infrastructure managers (IMs), MS/IM (RNE) for train service levels and punctuality. Railway undertaking (RU) for passenger numbers, quality aspects. RU participation to be ensured via CER / AllRail
- Data Integration: Designing a system of Excel files, with individual files tailored for each Member State, complemented by a central master file that consolidates and integrates information from all the others seamlessly.
- Make a list of preferred and established Public Data Repositories for further use.

KPIs and Key Performance Metrics (KPM)

- A clear unified and practical definition of cross-border services, segments like night trains, regional cross-border, long distance cross-border and high-speed cross-border services, Availability of services, Ticketing quality, Service reliability (delays and cancellations) Infrastructure development impact on network expansion should be agreed upon unanimously.
- Expected services next 5 years (as in 2024 done)
- Ambition level of services by 2040, define indicator (e.g. number of capital-to-capital connections / major hubs).
- Operational Metrics: On-time performance, punctuality, reliability, disruptions, and cancellations.
- Agreement on Journey Continuation

Mapping and Visualization

- Service Maps: Visualisation of cross-border connections, service density, and bottlenecks (more maps with one clear message instead of one confusing map).
- Dashboards: Create an interactive platform showing key indicators, enabling dynamic exploration by stakeholders (#qgis2web).

Reporting and Transparency

- Frequency: Publish annual progress reports,
- Audience: Target European policymakers, railway operators, passenger groups, and environmental agencies (#advertising).

Strategic Areas of Focus

- Regional and Long-Distance Connections:
    - Evaluate the growth of cross-border regional services.
    - Define and analyse long distance cross-border (e.g. 200kmplus)
    - With the results, establish recommendations.
- Night Trains

Feedback and Improvement Cycle

- Regularly evaluate (in 2026-2030) the effectiveness of the monitoring framework.
- Incorporate insights from stakeholders and adapt methodology based on evolving challenges and opportunities.

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