Platform for
International Rail Passenger Transport

Established after Ministers' Declaration June 2020

Better railway connections for Europe's passengers

A shared agenda



Sixth Integrated Progress Report

2026

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Contents

Management summary 5
1 Introduction 7
1.1 The IRP platform 7
1.2 Vision 7
1.3 Status of this document 8
2 Monitoring international railway passenger transport 9
2.1 Methodology 9
2.2 Results 9
2.3 Best practices 13
2.4 Mapping 16
2.5 Conclusions 16
3 Customer experience and digitalisation 17
3.1 EU developments 17
3.2 National developments 18
3.3 Conclusions 19
4 Corridors 20
4.1 EU developments 20
4.2 National developments 21
4.3 Conclusions 25
5 Rolling stock 27
5.1 EU developments 27
5.2 National developments 28
5.3 Conclusions 29
6 Capacity Management 30
6.1 EU developments 30
6.2 National developments 31
6.3 Conclusions 31
7 Conclusions and recommendations 33
Annex 1 – IRP Terms of Reference 36
Annex 2 – Terms of Reference Sector Delivery Group 42
Annex 3 – Monitoring Scheme 2027 44
Annex 4 – Procedure of coordination of Member States strategic guidance for capacity allocation 45

List of tables

Table 1: Key monitoring figures 2026 (EU + Norway, UK, Switzerland). 5
Table 2. Key monitoring figures 2026 (EU + Switzerland, Norway, UK) 9
Table 3. Number of services per country and average frequency for all trains per day .. 11
Table 4. Capacity per type of services 11
Table 5. Shares of PSO and open access 12
Table 6: Recent market developments in Europe 12
Table 7. Proposed Building Blocks for Developing an International Rail Passenger Network by 2040. 25

Management summary

This sixth Integrated Progress Report of the Ministerial Platform on International Rail Passenger Transport (IRP) sets forth the progress made, over the 2025 – 2026 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, 2024 and 2025 reports.

During the reporting period, the IRP confirmed its longer-term role by adopting new Terms of Reference for 2025-2030. These Terms of Reference clarify the Platform's mandate, responsibilities and working methods, and provide a common basis for cooperation between Member States, EU bodies and sector stakeholders.

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 sixth year, the IRP countries participated in this 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. The monitor confirms that the volume and diversity of international rail passenger services continue to grow. The 2026 monitor showed an increase up to 22.5% in cross-border service connections, increases were noted in all types of services (high-speed, regional, night and Intercity trains). New night trains, high-speed as well as Intercity connections and operators are entering the market.

Table 1: Key monitoring figures 2026 (EU + Norway, UK, Switzerland).

Type of train	Regional	Intercity	High-speed	Night train	Tram
Connections Europe	192	217	116	51	11
Average daily	9,04	1,84	2,58	1	13
Aggregate	1.737	400	300	51	143
Trains total	2.632				
Average of services per day	5,5				

The report highlights case studies throughout the European Union and beyond 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. In addition, there are strong indications that investments in cross border passenger rolling stock are rising, both by incumbent railway undertakings as well as new privately owned railway undertakings. Cross-border infrastructure, interoperable capacity and coordinated planning are a key requirement in this regard.

At the same time, international services still lag behind comparable domestic services in terms of frequency, speed, capacity and reliability. The IRP has therefore continued to focus on addressing practical bottlenecks and on providing a forum for Member States and sector stakeholders to exchange experiences and support bilateral and multilateral initiatives. In 2025–2026, the platform organised several meetings on services and corridors, infrastructure networks, passenger experience and ticketing, rolling stock and capacity allocation, as well as on the future of the platform and market monitoring. In this context, the legislative package of the European Commission on the digital single market for rail ticketing, presented on 13 May 2026, is therefore a crucial step.

Recommendations

1. Develop a 2040 European target network for international rail passenger services: IRP should work with the sector, EU-level bodies, RNE and FTE to define a common 2040 network vision, including desired connections, frequencies, capacity levels and market segments. This should also identify missing links and guide future corridor and pilot initiatives.

2. Improve interoperable and passenger-friendly rail ticketing: Ticketing should be based on real-time data exchange, easier multi-operator booking and stronger passenger rights. Member States should coordinate their views on the Commission's 2026 ticketing proposals and explore neutral distribution models, such as those being developed in France and Germany.

3. Coordinate capacity management across borders: Member States should align strategic guidance for infrastructure managers. Stakeholders should be consulted, and implementation of TSI telematics and the new Capacity Management Regulation should be properly supported by national legislation and IT systems.

4. Reduce rolling stock barriers and investment risks: Vehicle authorisation procedures should be shortened and made more predictable. Operational requirements such as TSI and ERTMS should be stabilised to avoid costly changes during procurement. Member States should support interoperable "go-everywhere" rolling stock, improving access to second-hand vehicles and use instruments such as the Luxembourg Rail Protocol and state guarantees to reduce financing risks.

5. Move from isolated pilots to a coordinated European corridor approach: Future pilots and corridors should contribute to the 2040 network vision rather than remain as stand-alone experiments. Member States and infrastructure managers should identify missing links and agree how to prioritise international services where capacity is scarce. Corridor governance is necessary to align actions on European level. Multiannual infrastructure funding and a coordinated mix of public and private financing should support implementation, especially for high-speed rail.

1 Introduction

1.1 The IRP platform

This sixth Integrated Progress Report of the Ministerial Platform on International Rail Passenger Transport (IRP) sets forth the progress made over the 2025 – 2026 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, 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 RailNetEurope (RNE) and consumer organizations including the 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.

The Platform for the Development of International Rail Passenger Services (IRP) bring together Member States, infrastructure managers, railway undertakings, and sector stakeholders. The platform provides a non-binding forum for identifying bottlenecks, sharing best practices, and developing recommendations, without creating legal or financial obligations. Membership consists of European countries that endorsed the 2020 declaration, with EU bodies and sector representatives participating as observers. Decisions are taken by consensus, and outputs focus on practical recommendations and progress reporting to transport ministers. The IRP focuses on reporting on results in the international passenger rail market and working on removing bottlenecks (operational, administrative, legislative, technical) with all partners. The continuation of this work required an updated mandate and clearer working arrangements for the coming years. For this reason, the IRP Platform adopted revised Terms of Reference on 7 November 2025, replacing the 2023 version (see Annex 1).

The renewed IRP mandate is complemented by the work of the Sector Delivery Group, which brings the operational perspective of the rail sector into the Platform's agenda. The Sector Delivery Group also redrafted its Terms of Reference (see Annex 2) and provided input in the report on the key challenges and priority. In 2026, the Group aims to propose a programme of concrete actions for 2026 and beyond, to be jointly developed with Member States participating in the IRP. The group has contributed to the 6th IRP progress report and is responsible for the subchapters "sector developments". Panteia supported the Platform in drafting this report.

1.2 Vision

The state of international rail passenger services is still well below comparable rail domestic services in Europe. Frequencies, train speed and rail capacities are at a far lower rate for cross-border travel between cities of similar size compared to domestic connections. More action from Member States, sector and EU institutions is needed to improve the quality for cross-border train services. Improvements to the availability and online distribution of tickets, 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 IRP considers the following principles to be essential:

- Enabling rail to become the preferred mode of cross-border passenger transport in Europe;
- Providing high-quality and resilient rail infrastructure and capacity;
- Making railways more competitive vis-à-vis air and road transport;
- 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 interconnected 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 chairs/sponsors took the lead in drafting the four topic chapters (on rolling stock, capacity, corridors and ticketing). The sector parties provided input on the sector paragraphs. The Austrian Ministry developed the service monitor and processed the information from the MS on the international services.

2 Monitoring international railway passenger transport

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. The present progress report brings the results of the fourth monitoring iteration. The monitoring is based on a detailed survey spread among the MS and sector parties.

2.1 Methodology

A survey was used to collect data on international rail passenger services on a daily origin-departure basis, counting cross-border passenger trains departing from each country on an average calendar day. The dataset is based on a harmonised survey completed by EU Member States, Switzerland, Norway and the United Kingdom, and was verified where possible through official railway undertaking websites. The survey covered service type, contracting, frequency, cooperation between railway undertakings and train capacity. After collection, the data was cleaned, quality checked and harmonised, including the correction of inconsistent station names and the removal of duplicates, so that each international service was counted only once.

For analytical purposes, services were allocated only to their origin and destination countries, meaning that transit countries are not reflected in country totals. A rule-based script classified services as Regional, Intercity, High-speed, Night train or tram. Operating patterns were converted into average daily departures and annual aggregates, after which cross-tables were prepared for the analysis. Some limitations remain, as information on seating capacity and railway undertakings was insufficient to produce reliable results. As each service is counted only once, national totals may be lower than domestically reported figures.

2.2 Results

During the typical working day, the European Union, Switzerland, Norway and the United Kingdom are now served by some 587 international railway passenger services (train pairs), an increase of 108 services compared to last year. Regional cross-border connections total over 192, with an average frequency of 9 (unidirectional). On top of this, almost 217 direct intercity (IC) services are operated, with an average 1,8 daily trips. High-speed services count a total of 116, on average offering 2,5 trains per day. Finally, 51 night-train connections are available, with an average of one daily trip. Together, these services make up for a total of 2.632 train pairs per day, which is an increase of 240 train pairs per day compared to the previous year. These key facts are shown in the table below:

Table 2. Key monitoring figures 2026 (EU + Switzerland, Norway, UK)

Type of train	Regional	Intercity	High-speed	Night train	Tram
Connections Europe	192	217	116	51	11
Average daily	9,04	1,84	2,58	1	13
Aggregate	1.737	400	300	51	143

Trains total	2.632
Average of services per day	5,5

Firstly, more international passenger trains are added to the services[1]. 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. Thirdly, tram cross-border connections were introduced this year. Even with missing cross-border tram connections tram connections can eminently attest to the high daily frequency all year long and explain the greater sum of trains altogether per day and year. Fourth, data was compared with last year's data and amended where a service was found to still be operating this year.

There was approximately a 26.8% increase in the total number of trains from 2025 to 2026. For regional trains, we observe an increase of 10%; for Intercity train services, there is as an increase of 40%, which could also be the different of interpretation of the definition in comparison to last year and an addition of missing connections. For high-speed train services, we see an increase of 34.9%, due to the introduction of new high-speed routes in 2026 and different of interpretation of the definition in comparison to last year. In addition, some routes were converted from long-distance to high-speed ones and some routes were converted from long-distance or high-speed to Intercity. For night train services, a decrease of 23.9% was recorded[2]. This adds up as some seasonal services were missing this year and some connections where the night train is being decoupled and continues to different destinations weren't always counted as different night trains.

Although the increase may at first appear substantial or not fully consistent with last year's data, the opposite is the case. The comparison shows a clear improvement in the quality and consistency of the data compared with previous years. This is expected to become even more accurate next year, once a unified dataset provided by RNE can be processed, enabling both Member States and private operators to rely on one coherent source.

The table below provides a breakdown of international train connections from various European countries, classified by train type: High Speed (HS), Intercity, Night trains, and Regional[3]. 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, with more than half of their international services 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.

[1] Around 35 this year

[2] Especially night trains are vulnerable to big changes when compared as every small change has a great impact on the precent because there are a small number of connections

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

Table 3. Number of services per country and average frequency for all trains per day

	High-speed train	IC	Local train (tram)	Night train	Regional	Total
AT	3	40		12	23	78
BE	1	5	6	1	4	17
BG		2		1		3
CH	31	1		6		38
CZ	1	10		6	11	28
DE	50	91		1	82	224
DK		1		1	7	9
ES	4				3	7
FR	17			1	18	36
HR		5	4	1	1	11
HU		11		6	19	36
IE		1				1
IT		7		2	1	10
LT		4				4
LU					2	2
NL	4		1	1	2	8
NO		1		1	4	6
PL		21		6	3	30
PT					2	2
RO		9		3	1	13
SK		7		2	9	18
UK	5	1				6
Total	**116**	**217**	**11**	**51**	**192**	587

Table 4. Capacity per type of services

	Sum of Frequency (day)	Average of Capacity per train (max. number of passengers in 2025)	Total capacity per day
High-speed train	300	618	185.400
IC	400	303	121.200
Tram	143	200	28.600
Night train	51	282	14.382
Regional	1737	228	396.036
Grand Total	**2632**	**326**	**745.618**

Counting only the registered survey (without other) one can observe that more than double of the international rail services in Europe are still Public Service Obligation (32,7%). However, recent efforts for more competition have resulted in a 16,5% or more shares of Open Access services. Open access trains are running on open access can be either incumbents (state owned) or private operators.

Table 5. Shares of PSO and open access

Type of Contract	Count	%
PSO	192	32,7%
Hybrid	12	2%
Open Access	97	16,5%
Other	286	48,7%
Total	587	100%

Over the next few years (2026–early 2030s), Europe is not just seeing *more trains,* but it is seeing new types of international services, new routes, and new business models, as presented in the table below.

Table 6: Recent market developments in Europe.

Development	Description
Night trains - the biggest expansion	The following routes reconnect cities that lost night trains in the 2010s. These are built on the massive expansion of the ÖBB Nightjet network with new trains and routes and private operators like European Sleeper. • Paris → Berlin (2026) – revived overnight connection by European Sleeper • Amsterdam / Brussels → Milan (2026) – new Alpine night route • Central Europe → Germany/Austria sleepers (Poland, Hungary links) • Scandinavian routes to Berlin and Prague
New high-speed international corridors	Several major infrastructure projects will reshape cross-border rail built on new high-speed infrastructure developments leading to new services, like: • Prague – Berlin high-speed line • Fehmarnbelt Tunnel: Sweden – Denmark – Germany • Koralm Railway – Vienna – Slovenia/Croatia • Portugal – Spain high-speed line
New operators entering the international railway market	A third structural development is the entry of new operators into the international railway market. These new entrants can contribute to more competition, lower prices, especially on key routes, and new services on routes that incumbent operators did not previously serve. Examples include: • European Sleeper – expanding night routes • GoVolta – low-cost international trains • Le Train – private operator high-speed services in France • Leo Express: Warsaw – Kraków – Prague • Vy: Oslo - Berlin

2.3 Best practices

The following best practices illustrate how these developments are taking shape across Member States. Four examples are presented: the Vilnius–Riga–Tallinn rail connection, the Adriatic Express train from Poland to Croatia, the new service Milan/Rome – Munich, and the connection Zagreb – Sarajevo – Ploče.

Best practice Vilnius–Riga–Tallinn

The Vilnius–Riga–Tallinn rail connection marks an important milestone in strengthening sustainable passenger rail travel across the Baltic States. Developed jointly by the three national rail passenger operators, the route reconnects the Baltic capitals with a simple, coordinated and customer-friendly solution, offering an attractive alternative to road and air travel and supporting regional integration.



Previous Situation

International rail travel between the Baltic capitals had long been fragmented, with limited through-ticketing options and low visibility for cross-border journeys. Passenger demand for convenient and environmentally friendly travel options between Lithuania, Latvia and Estonia was growing, particularly between Vilnius and Riga, as well as Riga and Tallinn.

Project Development and Expansion

The Vilnius–Riga route was launched at the end of 2023, restoring regular passenger rail services between the Lithuanian and Latvian capitals. Building on its success and increasing passenger flows, the service was further extended at the beginning of 2025 to Tallinn, creating a continuous rail connection between all three Baltic capitals. Passenger growth has been strongest on the Vilnius–Riga and Riga–Tallinn sections.

How the Service Is Organised

The service is delivered through close cooperation between the three Baltic rail passenger operators: LTG Link (Lithuania), Vivi (Latvia) & Elron (Estonia). Passengers can travel from Vilnius to Tallinn with one ticket and only one transfer, making the journey simple and easy to understand. Journey flow: Passengers board the LTG Link train in Vilnius (or any intermediate stop in Lithuania). In Riga, the same train continues to Valga, but now operated by Vivi. At Valga (at the Estonian border), passengers transfer to an Elron train for the final leg to Tallinn. The transfer is designed to be very smooth: trains stop at the same platform, directly next to each other, allowing an easy step-across connection using the same ticket.

Good Practice and Added Value

This cross-border rail service serves as a strong example of how coordinated planning and customer-oriented design can make international rail travel competitive, reliable and attractive across the Baltic region.

Best practice new connection Warsaw – Rijeka (Croatia)

Route and service

After many years of effort, the Adriatic Express train from Poland to Croatia, i.e., from Warsaw to Rijeka, was launched on 27 June, 2025, for the summer season (until 29 August

2025). The train ran to Rijeka four times a week – on Tuesdays, Thursdays, Fridays, and Sundays, and from Rijeka to Warsaw on Mondays, Wednesdays, Fridays, and Sundays. Its route covered approximately 1 240 kilometres, making it one of the longest rail routes in Europe. The train passed through five countries: Poland, Czech Republic, Austria, and Slovenia, all the way to Croatia. It stopped at stations including Warsaw, Katowice, Ostrava, Břeclav, Vienna, Graz, Ljubljana, and Rijeka. Its destinations were Rijeka and Ljubljana.

Journey and demand

The Adriatic Express departed from Warszawa Wschodnia station at 1:44 PM, as an additional carriage to the IC Sobieski train operated by Polish RU, PKP Intercity SA as part of the PSC. At 10:30 PM, after passing through the Czech Republic, the train reached Vienna, where the Adriatic Express carriages were detached and set off again at 10:45 PM. At around 4:00 AM, in Slovenia, the train connected with the Istria night train from Hungary, which took passengers to Rijeka station by 10:03 AM. The return journey to Poland began at 6:15 PM. After 9:00 AM, the train crossed the Polish border with the Czech Republic and arrived at Warszawa Wschodnia station at 2:16 PM. The journey from Warsaw to Rijeka took about 20 hours and took place at night, in comfortable conditions, in carriages with couchettes and seats, and with access to a restaurant wagon. This connection was met with enormous interest, as evidenced by the average occupancy rate of 92%. In terms of destinations, 92% of passengers travelled to Croatia and 8% to Slovenia. The most popular stations where passengers boarded were Warsaw, Katowice, and Břeclav (Czech Republic).

European cooperation

The launch of this train symbolized the intensive European cooperation between the five countries in the development of international rail passenger transport. This connection demonstrated openness, determination, and a shared vision for a future in which mobility, ecology, and comfort are not a luxury, but the norm. The Adriatic Express train is not only a tourist adventure but also a response to contemporary transport challenges. This connection is also planned for launch in the summer season of 2026. Additionally, the train will run to Koper, Slovenia, located near Trieste, Italy.

Best practice - New service Milan/Rome - Munich

Current situation

Currently there are no direct trains from Germany to Milan or Rome: Trenitalia or NTV Italo train passengers have to make a stopover in Verona using ÖBB or DB+ÖBB RailJet trains to reach Innsbruck or Munich.



The new service

The Frecciarossa Three-Country High Speed Train will start services from June 2027. This train will connect the cities of Milano and Rome with Innsbruck and Munich. At full service, in 2029, there will be 5 train pairs, two of which will be extended beyond Munich, connecting Naples and Milan to Berlin (via Innsbruck and Munich). These new services will use the Frecciarossa ETR1000 owned by Trenitalia, while the train staff will be in Italy from Trenitalia, in Austria and Germany from DB.

Issues to overcome

It will take about 4 years of preparations: the trainsets have to be retrofitted and homologated to run in Italy, Austria and Germany. The safety system in the trains had to be extended with ETCS and German and Austrian rail safety system, the train

set has also to be adapted to cover the three different electrification systems.

Financials

The service has no PSO support, it is a service on the market operated by DB and Trenitalia.

Best practice - Zagreb – Sarajevo – Ploče connection

Passenger rail services between Zagreb and Sarajevo have been discontinued since 2016, leaving the two capitals without a direct rail connection. Reintroducing this service would strengthen regional connectivity and improve links between the EU and neighbouring countries. The proposed service would operate on the Zagreb–Sarajevo route via the Volinja/Dobrljin border crossing, with a possible extension to Ploče on the Adriatic coast.



Implementation

Implementation requires close cooperation between HŽ Putnički prijevoz, Željeznice Republike Srpske and Željeznice Federacije Bosne i Hercegovine. A formal agreement is needed to define responsibilities for operations, rolling stock, staffing and maintenance. As the route crosses the external Schengen border, border police and customs procedures must also be integrated into the operational concept.

A coordinated timetable must be developed and aligned with existing national and international services, as well as with available infrastructure capacity. Operational rules, safety standards and cross-border procedures need to be harmonised to ensure smooth and efficient service operation. A critical requirement is the availability of suitable and interoperable rolling stock capable of operating across the full route under different technical and regulatory conditions. Ensuring reliability and continuity of service is dependent on securing sufficient trainsets.

Challenges

A major constraint is the limited availability of free and interoperable rolling stock, which directly impacts the feasibility of launching the service. The complexity of international coordination represents an additional challenge, as the service would operate across infrastructure managed by multiple entities in two countries. The route also crosses the external border of the Schengen Area, which entails mandatory border control procedures carried out by national border police authorities.

Timeline

Given the current timetable planning cycle, the service cannot realistically be introduced before the 2027/2028 timetable period. Nevertheless, there is clear mutual interest in re-establishing the connection, supported by the March 2026 feasibility study, which provides a basis for further cooperation and implementation.

2.4 Mapping

The rail services are visualized in an interactive web-based map of Europe. The interface combines a geographic representation with analytical dashboards and filtering options, enabling users to explore cross-border rail connections in a structured and comparative manner. By interacting with the map, users can select individual countries, which reveals detailed information on connections to partner countries, including train frequencies and year-on-year changes. This allows for a spatial understanding of how rail services are distributed across the continent and how strongly countries are interconnected.

The visualization is complemented by a control panel, where users can switch between different categories of rail services, including night trains, IC-trains, high-speed trains, regional trains and trams. This filtering function enables a differentiated analysis of the rail system by service type. In addition, a second analytical mode allows the selection of individual railway operators, shifting the focus from country-level patterns to operator-specific networks and market presence.

The tool integrates spatial visualization with interactive filtering and statistical summaries. It enables both a high-level overview of European rail connectivity and a more detailed exploration, thereby supporting comparative analysis and interpretation of cross-border rail network.

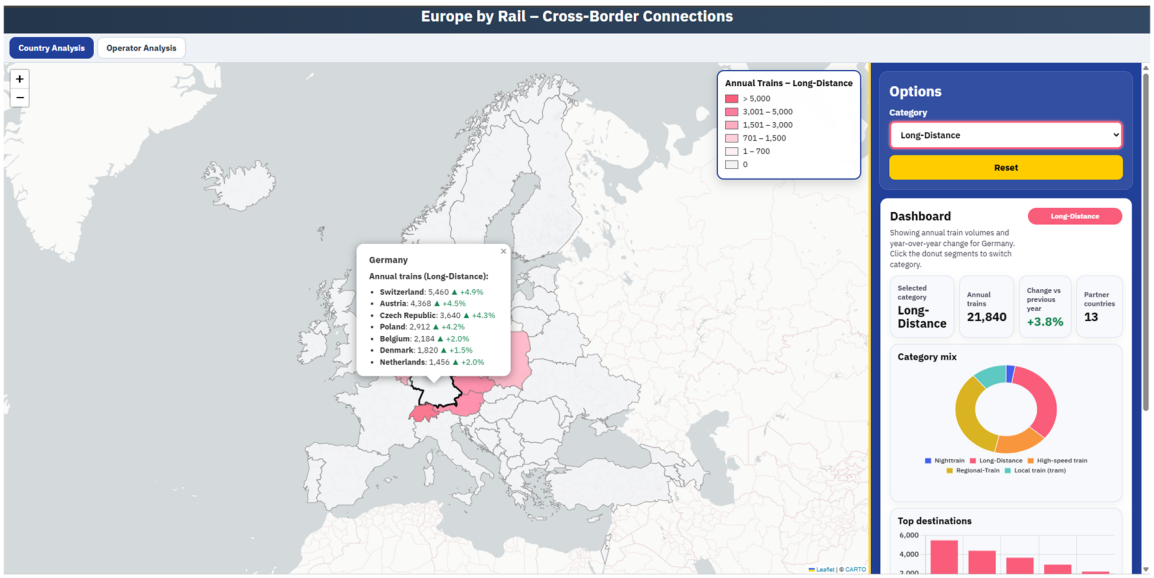


Figure 1: Interactive web-based map of rail services in Europe.

2.5 Conclusions

At present, Europe is served by a significant network of international rail passenger services. With total capacity of some 189 million passengers per annum, the railway network is considerable even compared to Europe's large airports. Nevertheless, the international railway passenger transport is a fraction of the domestic/national railway passenger transport. There is a huge market to win. The number of new international services announced shows there is still huge potential, such as in the Visegrad countries, Nordic countries and Benelux. The diversity shows that additional studies are needed to evaluate best practices and that monitoring is crucial to gain a deeper understanding of the international rail passenger market.

3 Customer experience and digitalisation

International rail ticketing remains one of the most persistent barriers to the growth of cross-border passenger rail in Europe. Passengers expect a single, coherent journey experience, with one search, one booking, clear travel information, and reliable and available support and information. However, the cross-border customer experience in 2026 is still fragmented. A passenger travelling from Groningen (NL) to Brno(CZ), for example, must currently buy a NS ticket from Groningen to Hengelo, a European Sleeper Express ticket to Prague and a CZ ticket to Brno. In aviation, passengers can usually easily combine different flights with one single booking. For international rail to become a genuine competitive alternative to flying and to long-distance car travel, this fragmentation must be addressed through cross-border integrated ticketing systems.

3.1 EU developments

The European Commission aims to make it easier for passengers to plan, compare and book cross-border and multi-operator rail journeys. In 2026, the most significant development is the publication by the European Commission on 13 May 2026 of a legislative package addressing the digital single market for rail ticketing. This package consists of three interrelated files:

1. **Multimodal Digital Mobility Services (MDMS) Regulation** aims to improve transparency and fair competition in the online multimodal ticketing market, ensuring that rail products are appropriately presented in multimodal sales channels and that data access conditions are fair and non-discriminatory.
2. **Single Digital Booking and Ticketing Regulation (SDBTR)** specifically targets rail passenger services. It seeks to increase the availability and variety of rail tickets through digital platforms, enable booking of multi-operator rail journeys in a single transaction, and maintain full passenger rights throughout the entire trip. The European Commission published an impact assessment in October 2025. A sensitive point in the discussions concerns the Commission's intention to set maximum fees for the reselling of tickets, a measure that has prompted varying reactions from Member States and operators.
3. **Revision of the Rail Passenger Rights Regulation** would focus on connection protection, disruption handling, and refund entitlements, that are now unclear when journeys involve multiple operators.

Following this announcement, the Commission will submit the proposed regulations to the Council of the European Union and the European Parliament for consideration under the ordinary legislative procedure. For IRP Member States, the May 2026 legislative proposals represent a significant opportunity. IRP can play a role in helping Member States prepare their positions before Council deliberations begin, to ensure that the ambitions of the package are reflected in the adopted regulations. A key challenge is the interpretation and enforcement of FRAND principles, which are highly fact-specific and have so far mainly been addressed in competition cases and are not implemented in rail distribution so far.

Earlier on 6 February 2026, the European Commission adopted a new Implementing Regulation on TSI Telematics, which entered into force on 2 March 2026. This regulation requires that journey planning, passenger information, and ticketing data be made publicly available, free of charge, via national access points in an interoperable manner aligned with the EU Data Act. The TSI Telematics needs to be applied by infrastructure managers and railway undertakings by 2027-2028 (phased approach for passengers and freight applications).

Industry-led solutions such as the Agreement on Journey Continuation (AJC) also contribute to improve passenger experience. Voluntary cooperation can provide effective passenger protection for multi-operator journeys. However, private operators are of the

view that AJC cannot replace or be equivalent to an EU wide Passenger Right protection. The Community of European Railway and Infrastructure Companies (CER) position is that CIT AJC becomes an industry mandate standard in the Rail Passenger Rights Regulation.

3.2 National developments

Alongside EU-level regulatory initiatives, several Member States are advancing their own national strategies to improve international and domestic rail ticketing. These national developments are significant not only in their own right, but also because they increasingly serve as testing grounds and potential models for broader European harmonisation. IRP can serve as an early coordination forum where Member States develop a shared understanding of the key issues, including the debate on mandatory ticket reselling obligations, FRAND conditions (fair, reasonable and non-discriminatory), taking into account commercial freedom of railway undertakings, and the role of third-party vendors before these positions are formally adopted in Council.

Two Member States merit particular attention in the current reporting period regarding national developments. France and Germany illustrate a broader trend toward greater public sector intervention in rail ticketing markets. They also highlight the inherent tension between the commercial autonomy of railway undertakings on the one hand, and the public interest in ensuring non-discriminatory access to journey information and ticket purchasing on the other.

National developments on rail ticketing markets

France

France has been developing a forward-leaning national ticketing regulation since 2019, with a revision currently discussed in parliament, and presented its approach at the Berlin IRP meeting. Key elements include a legal obligation for tickets for trains running under PSO contract to be made available for distribution through third parties, including all the fares available. Public transport authorities are developing back-office platforms independently from the railway undertaking operating the contract, to connect ticket vendors to every ticket available within the perimeter of the public transport authorities, allowing ticket vendors to combine tickets from different authorities and with open-access services. The ticket vendor then has the obligation to offer every service on a specific mode from the public transport authority he has a contractual agreement with.

The French transport regulator (ART) oversees whether commercial distribution contracts meet FRAND (Fair, Reasonable and Non-Discriminatory) conditions. In addition, the national competition authority also required SNCF Voyageurs to open its distribution channels to ticket vendors after a contractual agreement and to treat all the ticket vendors equally with SNCF Connect, its subsidiary. However, challenges remain, particularly for combined tickets and passenger rights associated involving both regional and high-speed services operated by different operators. If the National Assembly approves the revision of the law, ticket vendors may be required to sell tickets for any operator that asks, as long as they already offer a similar journey. This would mean that SNCF Connect would have to sell tickets for SNCF Voyageurs' competitors, including Trenitalia and the future operator Velvet.

Germany

Germany has announced, as part of the broader DB reform agenda published in September 2025, the transfer of DB Navigator and its associated web presence to DB InfraGO, with the stated objective of strengthening public benefit orientation and competitive neutrality. The agenda is called 'the Agenda for Satisfied Customers'. The goal is to strengthen competitive neutrality and public interest. This is relevant from a ticketing/distribution perspective, as DB Navigator is currently the dominant ticket sales and information platform in Germany.

The agenda calls for better use of all customer contact points, including the DB Navigator, station information systems, and onboard information, to immediately inform passengers of changes to their journey. The tripartite reform package also includes reform of track access charges and investment in digitalisation of both infrastructure and rolling stock. The implications for ticketing access and third-party distribution are being closely monitored by the sector.

3.3 Conclusions

The recently published EU legislative package (MDMS, SDBTR, Passenger Rights revision) could create a genuine window of opportunity to address the most persistent problems of fragmented distribution, lack of through-ticketing, and unequal access conditions for new entrants and third-party vendors. The French regulatory approach, and the German DB Navigator transfer each demonstrate that solutions are achievable, but that progress requires both political commitment and commercial willingness from incumbent operators.

IRP Member States are encouraged to exchange views among themselves and with sector ahead and/or during Council deliberations on the Commission's May 2026 proposals, to ensure that the legislative outcome serves both passenger interests and the broader goal of growing international rail. The period ahead is decisive for rail ticketing. The French approach, based on legal obligations for resale, regional platform opening, and FRAND oversight, could be proposed as a pilot model applicable to specific cross-border corridor services. Monitoring its performance on international services could provide concrete evidence to counter arguments about commercial freedom and loss of attractiveness.

IRP proposes to continue to monitor and where needed support sector development regarding investments and developments on availability of international rail ticketing. The acceleration of largely voluntary measures should generate benefits to passengers in the shorter term and may well increase market uptake by all international rail passenger undertakings.

4 Corridors

Railway policy often prioritizes national railway optimalisation over international services. Cross-border services often have second priority in national planning, although these operations do not need subsidies and long-distance train lines are in principle easy to integrate to national fast train slots. The increasing demand for new international services justifies this re-evaluation.

4.1 EU developments

In 2025, a general approach was reached by the transport council on the proposed new regulation on the Connecting Europe Facility including a strong focus on investments for cross-border rail infrastructure. On November 5th, 2025, the European Commission proposed the plan on high-speed rail (Connecting Europe through High-Speed Rail, COM (2025)960), aiming at developing a high-speed railway infrastructure network and connecting the national networks. Costs of the implementation of the high-speed rail infrastructures foreseen in TEN-T are estimated at €352 billion by 2050. The communication also includes some measures aiming at development of international rail services, notably on acquisition of rolling stock, access to service facilities, rail ticketing and passenger rights plus air-rail connectivity. All those measures are support measures to accelerate service development. The agreement reached in trilogue between Council, European Parliament and Commission on railway capacity is also very relevant. Introduction of the new approach is foreseen by December 2030.

RNE aims to evolve into a Network Coordinator function in line with upcoming EU Capacity Regulation requirements. RNE has been tasked in the previous years under the CEF framework to support cross-border passenger and freight pilot services by acting as a central coordinator, notably through establishing a single point of contact (SPOC) for applicants and improving coordination between infrastructure managers. RNE is exploring an internal pilot to define how the SPOC would operate, determine when it should be involved, and test the approach over a timetable period.

These EU-level developments underline the need for more coordinated European capacity planning. EuroLink provides a practical example of how infrastructure managers can work together to translate this ambition into forward-looking capacity concepts.

Best Practice: EuroLink

Mission

In EuroLink rail infrastructure managers and partners (IMs) join forces to design capacity concepts with a European view. EuroLink began in 2020 as an informal think-tank and has been an official RNE working group since 2025.

- Connect national strategic planning frameworks with an approach that delivers European added value.
- Highlight the European benefits of national infrastructure investments to support long-term funding needed to unlock the full potential.
- Enable RNE and its Members to fulfil challenges from EU institutions / legislation.

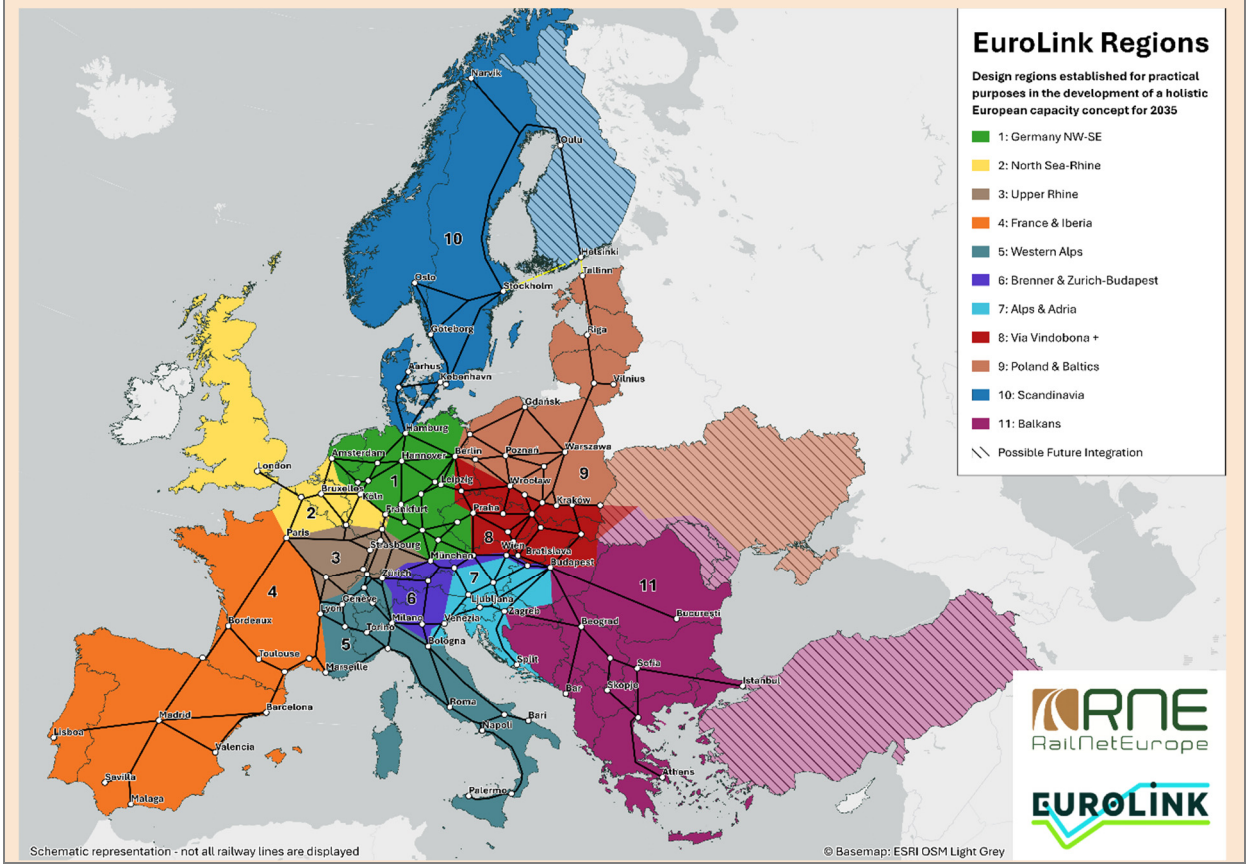
Capacity concepts

With 25 members from 21 countries today, EuroLink develops forward-looking, cross-border capacity concepts for Europe’s freight and passenger transport networks. These concepts look 7 to 15 years ahead and are fully grounded in market demand, with an eye on national and regional needs.

- We offer non-binding, medium to long-term capacity concepts. These are ideas how to organize cross-border traffic flow into a network of "rough" potential train paths in a systematic timetable structure.
- Current focus is on the 2035 time-horizon to optimize capacity on existing infrastructure plus expected new projects (deliverable planned in 2027).
- We are preparing for a long-term 2045-2050 time-horizon, that will go beyond and include infrastructural needs from a European perspective (to start early 2027).

Approach and applications

Such design on a European level is new, so working approach, involvement of partners and organization are all evolving:
- Simple yet powerful design philosophy: higher frequencies, shorter travel times, direct connections, and optimized transfers at hubs, and for freight sufficient capacity and quality long-distance slots to/from harbours, terminal and intermediate distribution points.
- Strong link to the European Transport Market Study commissioned by EU and undertaken by RNE in parallel.
- Involvement of train operators, Ministries, RFCs and other stakeholders to build the case for better rail. Challenge and improve capacity concepts, and raise support.



4.2 National developments

National practices show that many challenges are linked to capacity allocation, including competition between international and domestic trains for platform access and timetable slots. They also raise questions about how infrastructure managers and national authorities should be involved. For example, regulatory bodies may need to handle disputes between operators and infrastructure managers concerning maintenance delays, signalling upgrades or rolling stock interoperability issues (see Chapter 3.5).

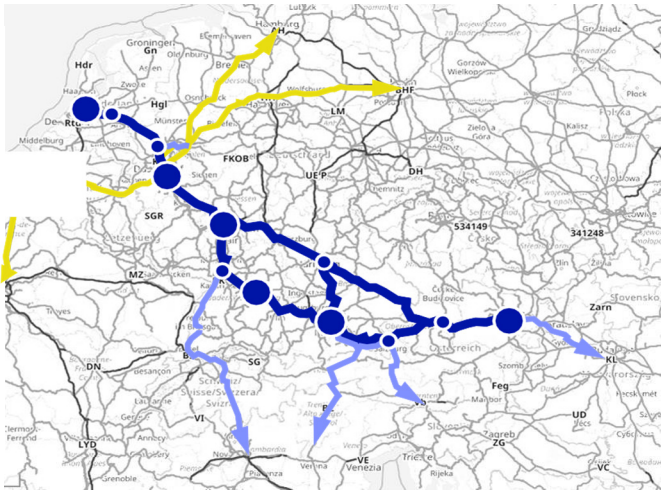
A more flexible approach to safety-related governance could also help new services enter the market. Instead of relying only on rigid approval procedures, greater attention could be given to transition arrangements and the practical challenges faced by operators. This could allow new train services to start under conditional, supervised and monitored operation, while practical experience supports the formal licensing and approval process.

The following three examples illustrate the role of Member States and infrastructure managers in creating the conditions for operators to launch new services. The examples comprise the Amsterdam–Frankfurt–Vienna–Budapest corridor, the Scandinavian corridor and the Austrian–Italian Southern Axis.

The Amsterdam–Frankfurt–Vienna–Budapest corridor[4]

Market potential

The initiative demonstrates strong market potential for international rail services, supported by both a corridor study and stakeholder discussions. Demand is evident, particularly for long-distance travel, though current analyses may underestimate shorter-distance opportunities and the importance of hubs and intermediate connections.

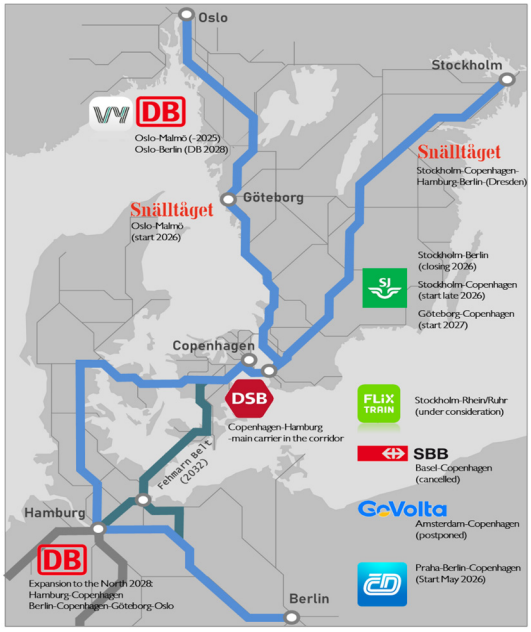


Key barriers

A key constraint is rolling stock availability, as no existing trains can operate seamlessly across the full corridor due to technical differences (e.g. electrification, signalling). Combined with high investment costs, this creates uncertainty for railway undertakings, who require long-term guarantees on capacity and financing (5–10 years) to support business cases. While train paths may technically be available, congestion from regional services and infrastructure limitations reduce commercial viability. This highlights the need for stronger coordination between Member States and infrastructure managers, including potential use of long-term planning tools and aligned capacity strategies.

Conditions for success

From a market perspective, success depends on better data sharing, transparent and predictable track access charges, and improved cooperation across stakeholders. Governments may also need to play a role in ensuring continuity of services and supporting favourable framework conditions. Finally, ticketing remains a critical bottleneck, with fragmented systems and limited access for third parties. There is a clear need for integrated, user-friendly booking solutions and greater transparency for passengers at European level.



Case study: Scandinavia corridor development

Vision

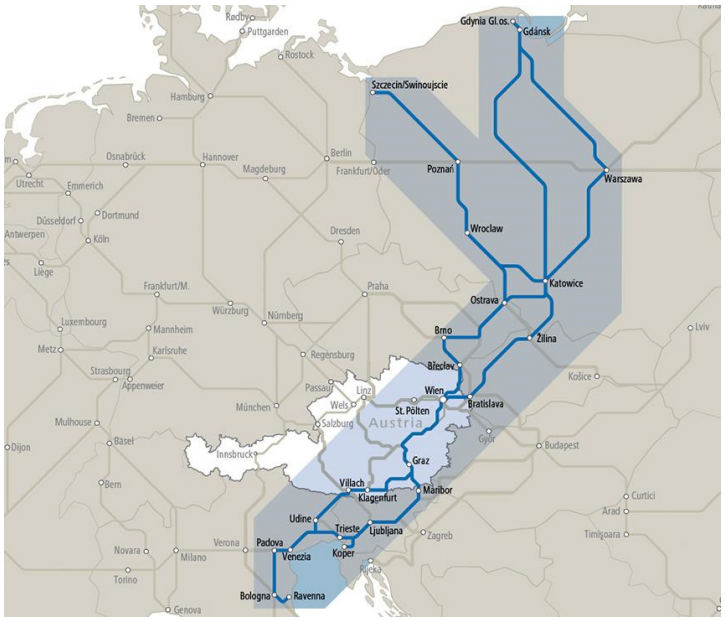
The basic idea of the Scandinavian pilot corridor initiative intends to roll out a wider network of lines, as launched in the EC cross-border rail pilots, July 2022. That is, to move away from the current situation with focused services mainly limited to the stretch Hamburg Hbf – København H. In the future, travelers have more options for direct day and night trains between the capitals Stockholm, Oslo, Berlin, Prague, and other destinations. Shortening the travel time by 2½ hours as a result of the Fehmarnbelt fixed link will of course support the development of a more attractive line network. However, the players already agree that the market for north-south train travel is growing.

Night trains

SJ Euronight was launched as a new night train in 2023 between Stockholm and Berlin. This train will be withdrawn from service during 2026. Many problems with technical approval of carriages in the start-up. SJ is still short of carriages, with the cancellation of services Stockholm/ Gothenburg to Copenhagen, but in 2027 SJ will resume cross-border traffic including a new 250 km/h Express. In the meantime, Snälltåget continues with its night train on a commercial basis Stockholm-Berlin, extended to Dresden. Snälltåget is even increasing its activity with a new day train Stockholm-Hamburg service and with a connection to and from Oslo via Malmö.

Other services

A GoVolta Amsterdam-Copenhagen service has been on the drawing board in previous years. The initiative stalled due to a lack of suitable coaches and great technical complexity. A Flixtrain service Dortmund-Hamburg-Copenhagen has been proposed. Flixtrain is awaiting new rolling stock and clarification of the business case. Resumption of the SBB night train Bern-Basel-Copenhagen-Malmö has been postponed primarily due to a poor business model. On the other hand, after waiting for InfraGO to complete track work on the main Berlin-Hamburg line, the CD-DSB RailJet has now been introduced between Prague and Copenhagen, with extended travel times in Germany for the time being. Since DSB will face a shortage of trainsets on national lines over the next few years, DB Longdistance will replace and keep up Hamburg-Copenhagen services, and DB will try to get its fleet of Talgo's approved technically so that it can continue via Gothenburg to Oslo.



The Koralmbahn as a Catalyst for the Austrian–Italian Southern Axis[4]

Introduction

With the opening of the Koralmbahn for passenger services from 14 December 2025 Austria has completed one of its most significant new railway infrastructure projects in decades. The new line between Graz and Klagenfurt reduces travel time between the two cities to less than one hour and fundamentally changes the accessibility of southern Austria. For international rail passenger transport, the Koralmbahn strengthens the Austrian approach to the existing southern axis via Villach and Tarvisio towards Udine, Trieste and Venice and vice versa. In this sense, the project reduces the functional distance between south-eastern Austria and northern Italy and improves the conditions for more attractive cross-border rail services. As part of the Austrian Southern Line and the Baltic-Adriatic Corridor, the Koralmbahn combines national accessibility gains with a wider European corridor logic. Therefore, it represents a relevant example of how domestic high-performance infrastructure can generate cross-border benefits.

Previous situation

Before the opening of the Koralmbahn, the rail connection between Graz and Klagenfurt was comparatively slow and indirect. This weakened the role of southern Austria as an access point to international services towards Italy. Although international rail services to destinations such as Trieste, Venice and Rome already existed, they were less attractive for passengers from Graz and parts of Styria because of long domestic travel times and indirect routing.

Current structure and sector organisation

The current structure combines several complementary layers. ÖBB-Infrastruktur AG provides the new high-performance infrastructure, while ÖBB-Personenverkehr AG operates and markets improved Southern Line services, including faster domestic connections and direct daytime trains to Venice and Trieste. Nightjet continues to offer overnight services to Italy, including Venice and Rome. From March 2026, open-access operator WESTbahn will also launch services between Vienna, Graz, Klagenfurt and Villach, moving towards five daily connections in each direction. Although this is not yet a new cross-border service to Italy, it strengthens the Austrian feeder axis towards Villach and the corridors via Tarvisio or Ljubljana, making it relevant for IRP as an example of open-access competition on new high-performance infrastructure.

Key issues to address

Several issues remain important for the further development of the corridor. The full corridor effect towards Vienna will only be achieved once the Semmering Base Tunnel is completed at the end of 2029, as the wider acceleration of the Vienna–Graz–Klagenfurt–Italy/Slovenia axis depends on completion of the Southern Line. Technical interoperability also remains a key challenge, particularly differences in power supply and train protection

[4] Source: https://infrastruktur.oebb.at/en/partners/transportlogistic/koralmbahn

systems between Austria and Italy. Cross-border services therefore require suitable interoperable rolling stock, operational coordination and vehicle authorisations.
The quality of connections at Villach, Tarvisio, Udine and Trieste will also be essential. The value of the Koralmbahn depends not only on faster travel times in Austria, but also on stable onward connections and cross-border timetables. Systematic monitoring should track passenger numbers, travel times, frequency of direct services, punctuality at key nodes and modal shift from road and air to rail. Finally, WESTbahn's entry shows that the Koralmbahn can create new opportunities for open-access operators, supported by modern multi-system rolling stock suitable for future cross-border development.

Next steps and financial implications
The next step is to manage the Koralmbahn not only as a national infrastructure project, but also as a strategic feeder for cross-border services towards Italy. This will require stable timetable coordination, transparent passenger information, interoperable rolling stock planning and close cooperation between Austrian and Italian infrastructure managers and railway undertakings. If successful, the Koralmbahn can become a best-practice example of how national high-performance infrastructure can create wider European added value by improving access to an existing international corridor.

4.3 Conclusions

Cross-border bottlenecks primarily relate to the lack of coordinated infrastructure capacity across borders, access to stations and service facilities, rolling stock authorisation and interoperability, and economic conditions such as infrastructure charges and public service contracts. At national level, Member States are increasingly addressing these types of issues through more structured rail planning. Domestic services are often organised around regular hourly patterns, or clock-face timetables, such as the German Deutschlandtakt and the Netherlands' Programma Hoogfrequent Spoorvervoer. These plans are then used to guide infrastructure improvements, capacity management and interoperability measures.

A common 2040 target network would make it possible to monitor progress year by year, identify where services are still lacking, and define the corridor actions needed to address them. On this basis, the following building blocks are proposed as an integrated programme of actions.

Table 7. Proposed Building Blocks for Developing an International Rail Passenger Network by 2040.

Building block	Actions

Develop an IRP 2040 vision together with SDG on the target network on international train services embedding connections, frequencies, capacities, and market segments	• Integrate following results to come up with an European target network of cross border rail services (2026 Q4 – 2027 Q2);
	• Making use of existing work / initiatives:
	  • EU 2021 mobility strategy. Double high-speed services by 2030, triple by 2050;
	  • Infrastructure developments expected by 2040 according to the TEN-T regulation;
	  • Eurocities;
	  • Regional agreements, policy goals;
	  • RNE, Eurolink vision on service levels, design of capacity strategies;
	  • RNE, European Transport Market Study; IRP monitor existing services.

	• Possible benchmark for defining 2040 target level bringing international service network at comparable level as domestic services in the area
Define with IRP and sector the missing links on existing network of services compared to target 2040 network.	• Compare 2040 target network to IRP monitor 2026 of existing services (2027 Q1); • Analyse differences and potential of missing links (2027 Q2); • Agreement between IRP and SDG on missing links (2027 Q2/ Q3); • Start with market segments long-distance and high-speed.

Establish corridor, pilot initiatives for the missing links with MoT's, with IM's leading.	• Governance. MoT's, IM's. Develop standard model in line with TEN T and EU rail capacity regulation (2026 Q4);
	• IRP and SDG members can propose pilots, corridors (2027 Q1 applications, 2027 Q2 selection by IRP with consensus MS);
	• Define scope of new pilot / corridor project 2027-2029:
	  • Infrastructure, lines and nodes;
	  • Market demand;
	  • Bottlenecks. Capacity, rolling stock, interoperability, economic;
	  • Available instruments: capacity strategic guidance MS, TEN-T investments, rolling stock measures, financial measures (CEF, state aid, PSO, infrastructure charging);
	  • Annual stakeholder consultation with RU's and stakeholders (2027 -2030).

Monitor results in annual IRP monitor (2026-2030)	• Monitor results.

5 Rolling stock

Interoperable, cost-efficient, and flexible rolling stock is essential for the development of international rail passenger services. There is a pressing need for "go-everywhere" rolling stock that can operate seamlessly across borders, supported by reduced national rules, standardised technical requirements, and predictable authorisation processes.

Investment in new rolling stock is urgently needed across Europe to renew and expand the fleet of rolling stock. Despite high demand, European suppliers are not expanding production, resulting in long lead times and high prices. The large upfront investments required for launching new services often make it difficult to arrange the necessary investment guarantees and the approval process of rolling stock is costly and time-consuming, especially when approval is required for different countries. These make it particularly difficult for smaller entrants to arrange for the necessary investment guarantees. At the same time, regulatory conditions must ensure that investment risks are manageable for the sector.

As shown in the next paragraph, a core legal development in previous years is the 'Luxembourg protocol', which facilitates the financing of rolling stock and the establishment of the ERA Task force should speed up the authorization process for new rolling stock. The Czech example shows this is crucial.

5.1 EU developments

The ERA Management Board established a Task Force under the 4th Railway Package Steering Group, aimed at streamlining authority task processes, with a primary focus on simplifying Vehicle Authorisation (VA). This Task Force, led by ERA, will bring together experts to analyse the full end-to-end VA process, identify bottlenecks and inefficiencies, and develop prioritised proposals ranging from quick fixes to long-term regulatory changes.

The work will follow a structured approach including stocktaking of existing proposals, process mapping, detailed identification of pain points, and assessment of solutions based on impact and feasibility. Outputs will feed into EU-level simplification initiatives, with initial proposals expected by mid-2026 and implementation continuing through 2027, supported by regular stakeholder engagement and monitoring.

Streamlining ERA's work on vehicle authorisation is also expected as part of the European Commission's revision of the ERA founding regulation, with a proposal anticipated in the second half of 2026. At European level the following developments can be mentioned:

- Workplan European coordinator Matthias Ruete on ERTMS, 10 Febr 2026;
- Upcoming revision of the European Deployment Plan on ERTMS in conformity with TEN T regulation (EU)2024/1679
- Ongoing work to update TSI CCS by 2028 and stabilize TSI specification

ERTMS is the backbone of technical harmonisation, yet deployment is significantly behind the TEN-T deadlines. Furthermore, end-to-end interoperability and its time durability has arisen as a challenge for smooth multi-network operation. Full rollout on the Core Network by 2030 and the Comprehensive Network by 2050 is unlikely without stronger coordination. The sector calls for stronger governance to oversee deployment, ensure version stability, and coordinate national and cross-border projects.

At international level, an important development is the introduction of the Luxembourg Rail Protocol in 2024. The protocol facilitates investments in rolling stock through a common legal framework for secured loans and leasing across countries, reducing legal uncertainty for banks, leasing companies and investors when rolling stock operates internationally.

Luxembourg Rail Protocol – facilitating investments in rolling stock

The Rail Protocol

Encouraging private investment in rolling stock across Europe at financially sustainable levels, particularly when rolling stock moves across jurisdictional borders, can only be achieved by confronting and mitigating various legal and operational risks creditors currently face.

The Luxembourg Rail Protocol to the 2001 Cape Town Convention on International Interests in Mobile Equipment is an international treaty that makes it easier and cheaper for the private sector to finance, through secured loans or leases, all types of railway rolling stock when the debtor/lessee is in a contracting state. It introduces a common transnational legal framework for securing private sector creditors financing rolling stock across Europe, establishing, for the first time a new public International Registry based in Luxembourg, where creditors can register their security interest in rolling stock.

The Protocol has been in force since 8 March 2024 and has already been adopted by the EU (in respect of its competences) as well as Luxembourg, Spain and Sweden but it is strongly recommended other Member States accede to the Protocol as quickly as possible.

Market benefits

The protocol will reduce costs for the rail sector through lower financing rates, attracting institutions, pension funds and private equity investors to enter the market. It will thereby increase the supply of private capital and reduce transaction fees, particularly for the financing of rolling stock operating in multiple jurisdictions across the EU. The protocol will also facilitate the ease of repossession and remarketing, encouraging the development of a second-hand market in rolling stock. It therefore provides direct practical support for the development of the Single European Railway Area.

The industry has made further recommendations to improve international rail in Europe. First, it is proposed to give the Eurolink[5] partnership a European legal basis. Eurolink is a voluntary initiative to jointly plan capacity in international links, but it's decisions are non-binding. Eurolink proposals should be considered binding for European countries and infrastructure managers. Secondly, framework agreements should be equal in all EU countries. In a framework agreements, a rail operator is entitled to access to the track for a number of journeys per day on a specific route for a period of, for example, 10 years.

5.2 National developments

A case in the Czech Republic illustrates the challenges of investing and operating rolling stock. Based on this experience, simplified processes on approval of rolling stock and stable TSI specifications are required to achieve real interoperability. Moreover ERTMS should be standardized.

Challenges of rolling stock investment in the Czech Republic

Czech Railways (CZ) ordered new locomotives for international services in three to six neighbouring countries. The issue is that their delivery takes five years from the signing of the contract up to the final approval for operational services, while in the meantime, new infrastructure requirements are introduced in neighbouring countries, such as ETCS updates.

[5] For Eurolink, see also Chapter 3 'corridors' / Eurolink

Scenarios
CZ foresees two scenarios to deal with these 'in between' changes in the rolling stock requirements:
- Additional investments in ETCS on-board units (even until 2031) are made which impact the business case and the schedule of introducing locomotives.
- Funding is lacking for additional investments which means to stop the introduction of the locomotives. Additional investments require additional search for budgets including the development of a new business case for the operations.

Inconsistencies
These constant changes in planning and operations create several inconsistencies:
- Ensuring error-free communication between all combinations of ETCS trackside and on-board parts requires demanding and lengthy compatibility testing, which significantly extends the time required for vehicle approval and deployment.
- Railway undertakings face fragmentation of the system due to the coexistence of different ETCS versions, making it difficult to establish stable operational routines.
- Different interpretations of TSIs by suppliers lead to compatibility problems between specific types of on-board units and sections of railway lines.
- There is uncertainty regarding the final specifications of future safety data sheets and FRMCS, which may still change by the time of vehicle delivery.

5.3 Conclusions

The Platform should safeguard the sustainability of investments in the purchase or lease of new rolling stock and to ensure that infrastructure can be used to its full potential. The ERA Task Force and the signing of the Luxembourg Rail Protocol could both contribute to this objective.

A coordinated approach by Member States and infrastructure managers is needed for the retrofitting and transition of ERTMS on-board units, in order to avoid divergence between EU and national initiatives. The stabilisation of TSI specifications is essential. One possible approach would be to update TSIs in a given year and then keep them stable for a defined period, for example ten years. The IRP should promote the roll-out of ERTMS. ERTMS should therefore be fully reflected in deployment plans, including clear planning on future specifications.

To achieve these objectives, the Platform will use the upcoming year to organise following activities:

- Invite the ERA (Task Force) to explain their activities. This workshop IRP – ERA / NSA on vehicle authorization should focus in particular on issues facing international rail passenger market.
- Promote the signing of the Luxembourg protocol, including with an information workshop organised for Member States.
- Contribute as IRO rolling stock group to SERAF subgroup on framework agreements to support financing rolling stock by new entrants;
- Organize a future IRP workshop on updated financing tools such as EIB high-speed and national good practice.

6 Capacity Management

Coordinated strategic guidance between Member States is now a prerequisite to ensure that international paths are prioritized and protected within domestic planning. As national networks move toward rigid clock-face timetables, there tends to be little space for international services, which are also more vulnerable to disruptions. Attracting funding is also a challenge, as the frequent changes in timetables (e.g. yearly) does not guarantee predictable revenue streams and so does not attract private investment. Reliable funding would enable infrastructure managers to provide more precise and transparent information to operators. Reciprocal commercial conditions between railway undertakings and infrastructure managers can incentivise efficient use of capacity.

6.1 EU developments

The regulatory framework governing rail infrastructure capacity management is currently undergoing a fundamental transformation at European level. The new Regulation on the use of railway infrastructure capacity in the single European railway area, replacing Regulation (EU) 913/2010 and amending Directive 2012/34/EU, has reached the final compromise text in December 2025. The underlying objective, as stated explicitly in the regulation, is to increase the utilisation of rail infrastructure by making more efficient use of available capacity through better planning and allocation processes and improved cross-border coordination.

A central change introduced by the regulation is the shift away from an annual planning focus toward a structured three-phase process.

1. **Strategic capacity planning:** covers a five-year horizon ahead of any given working timetable and requires infrastructure managers to develop a sequence of progressively more detailed planning documents, comprised of a capacity strategy, consisting of a capacity model, and a capacity supply plan. In the new governance architecture, the European Network of Infrastructure Managers (ENIM) play a substantially expanded role. ENIM is tasked with developing three European Frameworks for capacity management, for the cross-border coordination of traffic management, disruption management and crisis management.
2. **Scheduling and capacity allocation**: determines how available capacity is distributed among applicants through framework agreements, an annual allocation process, rolling planning, or ad hoc requests.
3. **Adaptation and rescheduling**: governs changes to allocated capacity rights after allocation, including a new penalty system designed to create financial incentives for both infrastructure managers and applicants to respect committed capacity.

Member States are granted on a voluntary basis the right to provide binding strategic guidance to their infrastructure managers, such as integrated clockface timetables, minimum capacity reservations for specific traffic types and parameters for conflict resolution. If they choose for strategic guidance, MS are explicitly required to coordinate that guidance with at least neighbouring Member States to support international services for passenger and freight. This last obligation in accordance with articles 4 and 56 of the Regulation is directly relevant to the IRP context, where the NExBo subgroup has begun developing a procedure for just such coordination, with a target of publishing the first coordinated strategic guidance by October 2027.

Next to the transition to the new Regulation Capacity management, infrastructure managers, railway undertakings and terminals should also implement the TSI telematics by 2027-2028. MS have to take into account that national legislation is compliant with the Regulation. Concerning the IMs, attention should be paid to the IT systems that are needed for the implementation of the Regulation.

6.2 National developments

The provision that Member States may implement binding strategic guidance raises the question about how to protect international services in national infrastructure planning. The risk of fragmentation is real if strategic guidance is applied inconsistently across borders.

A NExBo sub-group was established on 23 October 2025, co-chaired by Austria and Luxembourg with the goal to coordinate the strategic guidelines within the MS and sector. A proposal (procedure document) was prepared and first discussed between ministries in January 2026. During the meeting in January 2026, it was agreed that MS shall coordinate the transport policy objectives and priorities influencing international rail transport, including national or regional nodes necessary for efficient cross-border transport. The sector was consulted in March 2026. The objective is the approval of the proposal at the NExBo plenary on 6 May 2026. The agreed procedure is included in the 6th IRP progress report as Annex 4.

Core elements of the proposal are:

- Definition of a minimum number of international train paths on different sections
- Coordination applies only to international trains
- Consultation of infrastructure managers is required when drafting strategic guidance

6.3 Conclusions

The timeline for implementation and coordination of strategic guidelines has been proposed and may be agreed as follows:

- July 2026: Member States inform the NExBo group whether they intend to establish strategic guidance for the working timetable periods starting in December 2030 or December 2031.
- November 2026: Coordination of strategic guidance between Member States with at least their neighboring countries. The goal of this meeting is to exchange information and work together on gaining knowledge and understanding about the Strategic guidance.
- October 2027: Publication of strategic guidance for the timetable periods 2030 and/or 2031 after consultation of IMs. Practically this could come down to a certain number of international train paths that should be kept open for passengers and freight. Proposal is to meet in September 2027 for a final check. A follow up could be the creation of a working group to clarify further details. The organization of a conference to launch coordination of strategic guidance would create an opportunity to further coordinate between the NExBo and IRP groups.

The IRP progress report for 2027 should include a dedicated monitoring section on the first capacity strategies published by Member States under the new Regulation, with a particular focus on whether strategic guidance has been used to protect cross-border international services. Key actions for IRP include:

- Finalizing and endorsing the NExBo coordination procedure for strategic guidance, as a practical vehicle for Member State coordination under the new Regulation.
- Monitoring ENIM's work programme and the development of the three European frameworks, ensuring that international passenger services are adequately reflected.
- Exchanging national experiences on the implementation of strategic guidance, in the NexBo particularly regarding the treatment of international paths, clock-face timetables, and minimum capacity volumes.

- The importance of coordination with the IMs and RU’s concerning the process and content of the strategic guidelines. In the end the IMs have to apply the strategic guidelines.
- Strategic guidance shall be a stable document. Major changes with an impact to the capacity strategy shall be re-coordinated. If parts of the strategic guidance that need to be considered are deleted, the schedule for updates does not apply. Member States agree to evaluate the present procedures and schedules in 2029.
- In the medium term, there is a general need to discuss how cooperation between Member States can be organized after the disappearance of the Rail Freight corridors.

7 Conclusions and recommendations

In this progress report, the IRP laid emphasis on the crucial discussion pertaining to ticketing, rolling stock, capacity allocation, corridors and market monitoring. The results of a renewed monitoring exercise are brought forward.

The market for international rail passenger services continues to develop positively. New services, operators, and cross-border initiatives are emerging across Europe, particularly in the fields of night trains and high-speed rail. Examples such as the Vilnius–Riga–Tallinn connection, the Adriatic Express between Poland and Croatia, and the planned Milan/Rome–Munich high-speed services demonstrate both growing passenger demand and the willingness of operators and Member States to cooperate on new international connections. At the same time, the current level of international rail services remains well below the level of domestic rail connectivity in Europe and that substantial untapped market potential still exists.

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 587 international railway passenger services, an increase of 127 services compared to last year. Regional cross-border connections total over 192, with an average frequency of 8 (unidirectional). On top of this, almost 217 direct intercity services are operated, with an average 4 daily trips. High-speed services count a total of 116, on average offering 4 trains per day. Finally, 51 night train connections are available. Together, these services make up for a total of 2.632 trains per day: an increase of some 300 trains per day compared to the previous year.

International train services currently offer capacity for some 745 thousand people per day. Based on 300 operational days per year, the annual capacity of over 270 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.

Despite ongoing industry initiatives and upcoming EU legislative proposal, international rail ticketing remains fragmented. Passengers continue to face difficulties booking multi-operator journeys and obtaining clear passenger rights coverage for cross-border trips. The forthcoming European legislative package on MDMS, SDBTR and the revision of the Rail Passenger Rights Regulation is a major opportunity to improve access to ticketing data and distribution channels. A key challenge in this regard is the trade-off between FRAND principles required by Member States and commercial freedom advocated by railway undertakings.

Persistent barriers remain regarding cross-border capacity allocation, access to rolling stock, interoperability, infrastructure bottlenecks, access to stations and service facilities, and the predictability of long-term investment conditions. Experiences from European pilot projects and corridor initiatives demonstrate that cooperation between Member States, infrastructure managers, railway undertakings, regulators, and safety authorities is indispensable for enabling new services. In particular, the transition toward the new European framework for railway capacity management and the development of coordinated strategic guidance between Member States are important steps toward improving international connectivity.

Rolling stock availability and interoperability remain among the most significant barriers to international services. The ERA Task Force on vehicle authorization and the Luxembourg Rail Protocol are positive developments as they facilitate investment and reduce financing risks for operators, particularly for new market entrants. At the same time, there is still uncertainty and additional costs for operators due to rolling stock requirements. More stability over time on rolling stock requirements is necessary.

Recommendations

The report therefore puts forward several recommendations and priority actions for the coming years. **A key recommendation is to develop a (2040) target network on international rail passenger services**. IRP intends to deliver the methodology for developing this (2040) target network in 2027, seeking close cooperation with EU level and sector level, including RailNetEurope and Forum Train Europe. Recommendations per theme are presented below.

Rail ticketing

- Attention should be driven to interoperable ticketing for passengers based on real-time - data exchange in order to improve rail's competitiveness.
- IRP Member States are encouraged to exchange views among themselves and with sector on the three Commission's May 2026 Legislative proposals on rail ticketing.
- The Platform recommends exploring national regulatory models, such as France's legal obligation for third-party resale of PSO-contracted fares and Germany's transfer of the DB Navigator to a neutral infrastructure manager, to ensure competitive neutrality in distribution.

Capacity management

- Strategic guidance prepared by Member States (on a voluntary basis) to infrastructure managers should be coordinated to ensure consistency on binding requirements on minimum capacity volumes for specific traffic types, timetable designs, and the methodology for conflict resolution. A process must be agreed upon and all stakeholders should be consulted.
- Infrastructure managers, railway undertakings and terminals should implement the TSI telematics by 2027-2028 in parallel with the transition to the new Regulation Capacity management. MS must ensure that national legislation is compliant with the Regulation and IMs must pay adequate attention to the IT systems that are needed for the timely implementation of the Regulation.
- Member States should prepare multiannual funding for infrastructure managers to support early planning and execution of maintenance and renewal works. Reliable funding would enable infrastructure managers to provide more precise and transparent information to operators. Framework Agreements can play a key role in strengthening the position of open-access operators and supporting network development.

Rolling stock

- The Platform recommends immediate action to mitigate high upfront investment risks and shorten the five-year vehicle authorization lead time.

Member States should accede to the Luxembourg Rail Protocol to establish a transnational legal framework that facilitates private sector financing and underwrites the development of a robust second-hand market,

- To resolve technical bottlenecks, it is recommended that the ERA Task Force continues streamlining Vehicle Authorization (VA) processes and that the European Commission stabilizes TSI specifications to prevent "in-between" requirement changes, such as ETCS versioning conflicts, that currently delay fleet deployment.
- The sector calls for stronger governance to ensure ERTMS deployment meets TEN-T deadlines and enables "go-everywhere" rolling stock.

Standardisation must be pursued as a key lever for reducing lifecycle costs and increasing fleet flexibility. A clear ex-ante obligation is needed to guarantee fair access to second-hand rolling stock.

- Regulatory conditions must ensure that investment risks are manageable for the sector. State guarantees, improved residual values, and the application of the Luxembourg Protocol can help reduce financing costs.

Pilots and corridors

- An approach should be developed on the prioritization of national versus international trains, in response to the increasing demand for new international services.

Pilots and corridors must transition from isolated experimental projects to a comprehensive 2040 European network vision.

- Financing the European high-speed rail network requires a coordinated mix of public and private capital.

Integrated actions

- European network level: develop an IRP 2040 vision together with SDG on the target network on international train services embedding connections, frequencies, capacities, and market segments
- Define with IRP and sector the missing links on existing network of services compared to target 2040 network.
- Establish corridor, pilot initiatives for the missing links with MoT's, with IM's leading.
- Monitor results in annual IRP monitor (2026-2030).

Annex 1 – IRP Terms of Reference

As adopted 7 November 2025

Amended from ToR 2023
Validity period: 31 October 2025 – 31 October 2030;
As adopted in written (silence) procedure by Platform representatives, << 29 October 2025 >>
These Terms of Reference do not create any legal or financial obligations for any Member or observer of the Platform. This document replaces the Terms of Reference adopted the 25th of September 2023

Background
This Platform was set up based on the "Ministerial Declaration on International Rail Passenger Transport" (2 June 2020)[6]. This statement 1) includes the decision on the establishment of the Platform; 2) states that the Platform should support an European agenda on international rail passenger transport as part of the EU Green Deal; and 3) states that the Platform will collaborate with all signing EU Member States and signing third countries, the European Commission, the European Railway Agency, Europe's Rail Joint Undertaking, OTIF and rail sector organisations (the advisory Sector Delivery Group) (SDG).
The Platform builds upon the existing EU railway acquis and policy (Single European Railway Area, TEN-T, Innovation, etc.) and COTIF rules. The revised Terms of Reference are based on the responses to the questionnaire on IRP from July 2025.

Article 1 Purpose and Scope

(1) The Platform supports a European agenda on international rail passenger services. It also allows for discussion with sector representatives based on necessary actions based on the progress reports referred to in article 6. The Platform's focus lies on framework conditions for market development and may include:
- Actions at European level (EC, S2R, ERA, OTIF);
- Actions for Member States or for States working together on an international rail passenger corridor;
- Actions by the Railway sector.

(2) The Platform envisages a holistic and customer centred approach to bringing EU / Member States / sector initiatives together in order to facilitate the improvement of framework conditions for the development of international rail passenger services. This includes activities related to highlight progress, bottlenecks and gaps in cross-border rail activities in Europe. This allows the respective EU / national and private parties to converge their activities and inspire other participants.

(3) The Platform does not replace existing EU and national bodies and organisations, but complements them, taking into account the respective competencies.

(4) The Platform does not create any binding decisions, however, it may help facilitate strategic guidance on important topics.

(5) In addition to defining the necessary actions, the Platform cooperates on the implementation and monitoring of actions and will take into account where actions

[6] See https://www.permanentrepresentations.nl/permanent-representations/pr-eu-brussels/documents/publications/2020/06/04/political-statement-for-coalition-of-the-willing-development-international-rail-passenger-transport?s=09

are tackled under another existing platform. The Platform collaborates closely with the European Commission and with the sector mirror group, and builds upon the follow-up of the indicative work plan that is part of the progress report. The Platform takes account ongoing work by the sector mirror group and the European Commission, as to avoid doing double work. The monitoring of actions has been ongoing since 2020. New actions may be initiated if necessary.

(6) The Platform will develop an annual common workplan to be agreed between platform and SDG. On that basis the Platform develops reports that summarise recommendations on key areas of mutual interest for the development of International Rail Passenger Services within the scope of its competence as defined by the Ministerial Declaration on IRP.
    a. For each objective of the Rolling Workplan, sponsors from both the Member States and sector parties may be appointed. The sponsors' responsibilities are to facilitate the work on the specific objectives from the annual workplan and develop recommendation to the platform where appropriate.

Article 2 Membership in the Platform

(1) Members are European countries (both EU-members and non-EU member European countries) that have supported the 2 June 2020 Ministerial Declaration on International Rail Passengers transport. Members of the Platform are entitled to vote on decisions of the Platform. A list of members is annexed.
(2) Platform members are stimulated to actively engage in platform meetings and propose new projects and plans.
(3) European countries that have not adopted the Ministerial Declaration can attend the Platform meetings as observers. They do not have voting rights on decisions of the Platform. Non-member European countries may join the Platform at any point in time by adopting the Ministerial Declaration. It is possible for a country to approve the declaration retrospectively and thereby obtain voting rights.
(4) The European Commission (EC), the European Union Agency for the Railways (ERA), Europe's Rail Joint Undertaking and the Intergovernmental Organisation for International Carriage by Rail (OTIF) and the Organization for Cooperation between Railways (OSJD) are invited to participate in the Platform without having voting rights on decisions of the Platform.
(5) European rail passenger sector representatives and their customer organisations, which are collaborating through the Platform Sector Delivery Group, are invited to attend the Platform meetings as observers without having voting rights. Members of the SMG are invited and stimulated to be active in Platform meetings. The Platform works closely with the SMG. The SDG terms of reference / objectives are complementary to the work of the platform and are Annexed to this document.
    a. Sector parties could be invited on a thematic basis as well, selected on their specific expertise. This could be combined with the thematic working groups on specific areas.
    b. Sector parties are invited to periodically send research, best-practices or make proposals to enhance development.
    c. An interface bundling both member state and sector input will be created. This could form the basis for a shared vision.

Article 3 Activities

In line with the purpose and scope outlined above, the activities of the Platform may include:

(1) The organisation of specific theme-based workshops regarding topics of relevance to the platform. These workshops replace the subgroup structure that was set up in the 2021 Terms of Reference. The Platform's priorities are derived from the

progress report June 2025 and from the responses to the IRP questionnaire. The priorities regarding these workshops include, but are not limited to, the following:

a) KPIs and market monitoring annually on the basis of methodology to be defined by IRP
b) Presentation of pilots; / corridor projects
c) Case studies
d) New international passenger railway services
e) Ticketing
f) Multimodal transportation (i.e. air-rail cooperation, cooperation with urban transport)
g) PSO
h) Rolling Stock Acquisition
i) Capacity allocation (frameworks)
j) Open access conditions
k) Governance
l) Identify regulatory bottlenecks challenging cross-border services.
m) Identifying key regulatory initiatives that should be taken up at national or EU level
n) Raising awareness for shifting people from air to rail

In the annual common workplan a selection of above topics is included to be taken up with priority between Platform and SDG.

These priorities are not fixed; other priorities may emerge and any priorities that have been resolved will be removed.

The workshops will take place in a face to face or digital setting. Member States, observers and sector representatives will be invited to participate on a voluntary basis.

The outcomes of these workshops will be shared with all Platform members. There is no obligation to implement or follow up any consequent recommendations

(2) Monitoring of the development of international rail passenger services, taking into account the Commission initiative of developing a connectivity index. If necessary as part of the annual monitoring cycle, the development of a set of KPI's for international rail passenger transport.

(3) The facilitation of a forum in which the Member States represented can freely discuss their respective priorities.

(4) The exchange of views with the IRP sector mirror group.

(5) The sharing of information presented at relevant conferences on rail passenger services

(6) Based on market developments, setting annual goals to work on for the coming year, and reflecting on them afterwards.

(7) Platform members report to the platform on their national situation with respect to the conclusions put forward in the latest Progress Report.

Article 4 Working practices

The Platform will aim to meet preferably face to face one or two times a year. Any additional meetings will be held online. If necessary, meetings restricted to Member States will be organised.

(1) Draft agendas for the meetings of the Platform will be drawn up by the Chair at the latest 4 weeks before a physical meeting and 2/3 weeks before an online meeting. In that period, Platform Members can approve the agenda or propose to add new agenda items. The agenda will be adopted as first agenda item in the meeting. The chair takes all amendments and statements to the agenda provided by Members into consideration

(2) Proposals for recommendations to be adopted will be circulated at least 2 weeks in advance of meetings. If these deadlines are not met, the deadlines for the (written) voting procedure will be extended accordingly unless Members of the platform agree otherwise by consensus.

(3) Any other document (other than presentations for the meeting) provided as input to the meeting must be provided at the latest one week before the meeting as to ensure Members and Observers have ample time for review. Any documents not provided within this timeframe will not be taken into account in the meeting, unless Members of the platform agree otherwise by consensus.

(4) The Platform will take into account the views from the delegated members of the participants of the Sector Mirror Group.

(5) The Platform will take into account the views from the network of executive board of the rail freight corridor (Nexbo), to coordinate between freight and passenger issues.

(6) Where possible, the documents drafted by the Platform will be made available to the Platform members, observers and sector representatives on a (password protected) online platform. The Chair is responsible for providing all documents in accordance with the deadlines.

(7) By unanimous consent of the Members of the Platform, the Platform shall designate one or two Platform Members to fulfil chairing and secretariat functions. The term of office is one year and can be extended.

(8) The provision of the resources required to fulfil the chairing and secretariat functions remains in the responsibility of the Platform Members concerned.

Article 5 Decision making and voting

(1) The Platform members take all decisions by consensus. Only members present in the meeting are entitled to cast an eligible vote. Member States unable to attend a meeting where voting takes place may either i) issue their vote in writing to the Chair, no later than one day before the meeting, or ii) delegate their vote to another member state ("proxy").

(2) A unanimous decision is reached when all votes by Member States present in the meeting, as well as the votes cast by proxy or in writing, are in favour of a proposal. A unanimous decision is also reached if one or more Member States or proxies have abstained in the voting procedure.

(3) The Chair publishes recommendations and reports by the Platform at the latest one week after the Platform has voted in favour.

(4) The chair may decide on a written voting procedure where appropriate, taking into account the aforementioned deadlines on the sharing of documents.

(5) Member State(s) shall be informed in advance of the meeting on proxies concerned or at the latest before votes are cast.

(6) The platform reports to the Member States' transport ministers annually. A first progress report signed by the Dutch State Secretary of Infrastructure and Water Management and the Austrian Federal Minister for Climate Action, Environment, Energy, Mobility, Innovation and Technology was sent to all signatory Ministers on 25 May 2021. Follow up reports have been presented to ministers in 2022 / 2023 / 2024 / 2025. Henceforth the Platform will issue reports that will be more concise in nature. The focus of these reports lies on results, as opposed to the policy focused reports that have been issued previously.

Article 6 Revision and Termination Clause

(1) The Platform is not intended as an indefinite body. The Platform members may propose to terminate the work of the platform to the Ministers who signed the Ministerial declaration at a given point of time.

(2) Any Platform Member or Observer may decide to leave the Platform at any time. Platform members may in such case wish to consider to withdraw from the Ministerial declaration. The Member State or Observer will in such a case notify the Chair, other Member States and Observers in writing.

(3) The Terms of Reference may be amended and revised in accordance with a revision procedure agreed upon by unanimous decision by the Member States eligible to vote.

Annex. List of EU Member States and European countries that have endorsed the 2 June 2020 Ministers declaration
(date September 2025)

- Austria;
- Belgium;
- Bulgaria;
- Croatia;
- Czech Republic;
- Denmark;
- Estonia;
- Finland
- France
- Germany;
- Greece;
- Hungary;
- Ireland;
- Italy;
- Latvia
- Lithuania
- Luxembourg;
- Netherlands;
- Norway;
- Poland;
- Portugal;

- Romania
- Slovakia;
- Slovenia;
- Spain;
- Sweden (endorsed the declaration, observer member to the platform);
- Switzerland;

Observer countries: United Kingdom,
Other participants to the platform:

- European Commission;
- European Railway Agency;
- OTIF secretariat;
- Europe's Rail Joint Undertaking;

Sector observers:

- Members of the Sector Mirror Group.

Annex 2 – Terms of Reference Sector Delivery Group

Platform for the Development of International Rail Passenger Services (IRP) SECTOR DELIVERY GROUP

1. The Platform for the Development of International Rail Passenger Services (IRP) was set up in 2020 by the Council of Transport Ministers as a platform for high-ranking civil servants of the Ministries of Transport to improve service level of international passenger trains based on reports from 2021 and 2022. The Mirror Group was formed to encourage sector cooperation. EPF, CER, ALLRAIL, EIM, UNIFE, BEUC, EU Traveltec, ECCTA, CIT, UIC and the independent ticket vendors took part in the Mirror group.

2. The IRP has updated its terms of reference for the period 2025 to 2030. In the summer of 2025 members of the former Mirror group started discussions about the way the sector should participate in the work of IRP. There was a consensus that the sector should do better, f.e to address more efficiently issues that are relevant for smooth cross-border travel by train in Europe. On the European level the aviation and the car industry are more effective in promoting their interests than the railway sector.

3. The conclusions of the discussions within the SDG:

    - The sector should deliver more attractive services for the passengers following earlier statements from 2021 and 2022 and for that reason the name will be changed into Sector Delivery Group (SDG)
    - Other organizations and NGO's who have an interest in more and better international rail transport are invited to join the SDG. A list of current and requested members is maintained by a secretariat and distributed quarterly to all IRP members.
    - SDG will take an active part in the IRP and its subgroups, for instance the subgroup on the Corridor Budapest- Vienna- Frankfurt- Amsterdam.
    - SDG will promote close cooperation with the European Commission (DG Move) and the Council of Ministers.
    - The SDG will prepare specific proposals to be included in the IRP agenda.
    - The SDG will promote cooperation in the lobby of the sector in the various European institutions.
    - Within the SDG, the organisations representing operators, infrastructure managers and the industry are the 'delivering organisations'.
    - Organisations that take an interest in promoting better international passenger rail, such as, for example, passenger organisations and organisations representing the users and the planet, take the role of steering group, to supervise the progress on the commonly set goals.

    SDG operates on the basis of trust and cooperation, and any differences of opinion that may arise are dealt with in a solution-oriented manner.

4. To effectively achieve the objectives of the SDG, it is essential to appoint a chairperson and establish a professional secretariat supported by an appropriate budget. The secretariat of the SDG should be based at EPF to make clear that the purpose of IRP and SDG is to get more passengers on international trains.

   The qualifications of the chairperson:
   - A person with authority.
   - Knowledge of the European decision-making process.
   - Understanding of public transport
   - Diplomatic skills.

Any necessary amendments or additions to this document shall be agreed upon by the members of the SDG and implemented by mutual consent.

Last update: 7.12.2025

Annex 3 – Monitoring Scheme 2027

International Rail Passenger Transport

Many of the aspects that the Working Group "Monitoring Scheme" worked on and jointly defined as objectives could not be implemented this year due to limitations related to data comparability. The Working Group therefore suggests implementing these objectives next year. Working with data provided by RNE would mark a new chapter and create the necessary basis for implementing these objectives more effectively.

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Last update 2nd June 2026

Annex 4 – Procedure of coordination of Member States strategic guidance for capacity allocation

As agreed by Network of Executive Boards rail freight corridors after consultation of platform International Rail Passenger Transport

Recommendation of the Network of executive boards of the rail freight corridors, after consultation with the platform of International Rail Passenger transport
on procedures and schedules concerning the coordination between Member States in regard of strategic guidance:

The present document is intended to set out a non-binding recommendation concerning the procedures and schedules for the coordination of strategic guidance between Member States, in accordance with Art. 56 of the European Parliament and of the Council on the use of railway infrastructure capacity in the single European railway area, amending Directive 2012/34/EU and repealing Regulation (EU) No 913/2010 [hereinafter: "Capacity Regulation"]. The present recommendation does not create any legally binding obligations, nor does it entail any binding commitments for Member States or other parties. Its purpose is to facilitate coordination while fully respecting the competences of the Member States without prejudice to Union law and to national law.
The Network of Executive Boards hereby recommends the following concerning the procedures and schedules for the coordination of strategic guidance between Member States.

1. Addressees

Article 56(1) of the forthcoming "Capacity regulation" provides that Member States that develop strategic guidance shall coordinate such strategic guidance, including with Member States that do not adopt strategic guidance. The following procedures and schedules therefore address all EU Member States or States which are members of the European Free Trade Association and of South East European Parties to the Treaty establishing the Transport Community, in which international rail traffic is going through.

2. Purpose

The coordination of Member States' national strategic guidance should help promote international rail passenger and freight traffic in the Single European Railway Area by ensuring that the capacity needs of cross-border passenger and freight traffic are taken into account in a consistent manner within the respective strategic guidance of Member States, in accordance with articles 4 and 56 of the "Capacity Regulation". The coordination should focus on the parts of the network relevant for cross-border services, including cross-border lines and relevant nodes, while considering the capacity needs of domestic and cross-border rail traffic.

3. Scope

Strategic guidance entails policy orientations from the Member States regarding passenger and freight transport by rail. Member States shall coordinate with each other to ensure consistency between their respective strategic guidance and national requirements adopted in accordance with Article 4 (4), particularly as regards any binding elements, in case Member States decide to provide for such elements. They should coordinate transport policy objectives and define priorities for international rail transport. The coordination of strategic guidance should include national or regional nodes necessary for efficient cross border transport. Member States should consider the development of infrastructure and major renewal programs foreseen in national infrastructure strategies and reflected in the work plans of the European Transport Corridors in their coordination. Member States may

use the indicative annexes on a voluntary basis as guidelines to prepare, conduct and document the outcomes of the coordination.

4. Procedure

Member States envisage to engage the railway sector, e.g. infrastructure managers, railway undertakings, PSO authorities and regulatory bodies with a view to reflect expertise and considerations related to infrastructure capacity management and to operational and commercial aspects of cross-border services. Taking a multi-network approach into account, Member States should coordinate at least with neighbouring countries, enlarging where relevant the geographical level of coordination along European transport corridors or within regions exhibiting particularly strong interrelations in terms of passenger and freight transport. Member States are invited to use existing fora or to align the geographical scope with existing fora to avoid duplication and to streamline the coordination processes. Strategic guidance should be a stable document with multi-annual goals valid over an appropriate period of time defined by Member States. Member States may update the Strategic guidance, inter alia, regarding new ETMS results. Changes in strategic guidance with a major impact on cross-border traffic should trigger a new round of coordination between Member States. Member States agree to evaluate the present procedures and schedules in 2029.

5. Indicative schedules

The following timeline is based on the assumption that the "Capacity regulation" is published by June 2026. Member States aim to apply the following indicative schedule:

a) A shortened schedule applies to strategic guidance established in relation to the working timetable periods starting in December 2030 (TT 2031) and December 2031 (TT 2032).
    a. 1st of July 2026: Member States notify the Chair of NExBo and the Chair of IRP of their intention to establish strategic guidance for the working timetable periods starting in December 2030 and/or December 2031.
    b. 1st of November 2026: Member States start the coordination of strategic guidance with at least their neighbouring countries.
    c. 31st of October 2027: Publication of coordinated strategic guidance for the working timetable periods starting in December 2030 and/or in December 2031

b) Indicative schedule for strategic guidance established in relation to the working timetable periods starting in December 2032 and beyond (TT 2033+):
    a. X-70: Notification of intention of intention to establish or update strategic guidance.
    b. X-68: Start of the coordination of strategic guidance, including updates
    c. X-62: Publication of coordinated strategic guidance.

Indicative shortened schedule for TT 2031 and TT 2032

Deliverable	Milestone	Months before TT change TT2031 and TT2032
Strategic guidance (Article 4)	Start of the coordination at latest	X-49
	Finalized coordination and publication at latest	X-37,5
Capacity strategy	Publication of the draft strategy	X-38

(as in Annex I of the "Capacity regulation")	Publication of final capacity strategy	X-36

Indicative schedule for TT 2033 and beyond

Deliverable	Milestone	Months before TT change
Strategic guidance (Article 4)	Start of the coordination phase at latest	X-68
	Finalized coordination at latest	X-62
Capacity strategy (as in Annex I of the "Capacity regulation")	Start of the capacity strategy elaboration phase	X-60
	Publication of final capacity strategy	X-36

Where useful and feasible, stakeholder engagement in the coordination of strategic guidance can take the form of an iterative process between Member States and the rail sector, e.g. infrastructure managers, railway undertakings, PSO authorities and regulatory bodies. An iterative process can support Member States to ensure that the coordination of strategic guidance between Member States delivers feasible outcomes with sustainable impact, by enabling infrastructure managers to optimize the use of infrastructure capacity and operators to provide sustainable cross-border services.

Indicative annex I: Possible questions to develop a process for the coordination of strategic guidance

When coordinating strategic guidance, Member States may consider the following considerations in their own exchange and in the 'iterative dialogue' with the rail sector:

- What is the presumable demand for cross-border rail transport in terms of volume and characteristics? In the light of presumable demand and other considerations, what are Member States' shared policy objectives? In which way(s) can coordinated strategic guidance support the achievement of common policy objectives or make them binding?
- Which type of rail services can accommodate the presumed demand for cross-border rail transport, including both direct cross-border rail services and combinations of cross-border and domestic services?
- What are the constraints that limit cross-border rail services?
- Which trade-offs would need to be made to accommodate additional demand for cross-border services and how could those be implemented?
- Are there any inconsistencies between the binding elements of strategic guidance provided by the Member States that are likely to create barriers to cross-border rail transport services? Examples: inconsistencies between (a) specific timetable designs; (b) minimum volumes for types of rail transport services; (d) national parameters for the partitioning of infrastructure capacity and for formal conflict resolution adopted under Art 4(2) of the Capacity Regulation.
- [Review/Assessment after the first iteration] What was the impact of the coordination of strategic guidance, from Member States perspective and from the perspective of infrastructure managers and of the operators and customers of rail transport services?

Indicative annex II: Illustration of a possible outcome of the coordination of strategic guidance between Member States

For each cross-border origin-destination pair for which binding elements of strategic guidance are defined, such as expectations on connectivity (target frequency, travel time) and guidelines for prioritizing with other (domestic) services:

Origin (country A)	Destination (country B)	Policy expectation (eg. frequency, travel time, traffic type priorities)[7]	Minimum capacity volume reserved (tph, tpd, eg…)[8]	Guidelines for capacity bottlenecks with other services[9]	Specific timetable design? (eg. clockface)[10]	Relevant infrastructure development project[11]	Mandatory pre-planning? (Y/N)[12]

Proposed timeline summary procedure for coordination of strategic guidelines

Milestone	**Deadline**
Member States declare intent to NExBo	July 2026
Bilateral and multilateral coordination meetings	November 2026
Sector consultation period	January–March 2027
Final coordination check meeting	September 2027
Publication of coordinated strategic guidance	October 2027
Presentation to Transport Council (via IRP progress report)	June 2026
Presentation to European Transport Corridor Forum	June–September 2026
Evaluation of procedure	2029

[7] Article 4, section (1) point a) of Capacity Regulation
[8] Article 4, section (2) point b) of Capacity Regulation
[9] Article 4, section (1) point c) of Capacity Regulation
[10] Article 4, section (2) point a) of Capacity Regulation
[11] Article 4, section (1) point b) of Capacity Regulation
[12] Article 4, section (2) point c) of Capacity Regulation