

ERA ERTMS

Conference Opening

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European Rail : There is momentum!

Passenger demand growth

- + 5.8% in 2025

New connections, cross-border

Capacity Management

High-Speed Rail Action Plan (2025)

EU funding and MFF/CEF (2025)

EU ports strategy (2026)

Rail Ticketing Regulation (2026)

Strengthening ERA (2026)

Geo-politics

Rail industry



ERTMS Deployment: Are we on target ?

- 2030: 50,000 km (core network)
- 2040: Extended core
- 2050: 100,000+ km (comprehensive).



Source: Jon Worth

ERTMS Deployment: Reality?

- Only 10% of TEN-T network (12,400 km) equipped.
- 19% of vehicles fitted.

Source: Jon Worth



MS	TEN-T network (km)	ETCS in operation end 2024 (km)	Length commissioned with ETCS 2022 - 2024 (km)	ETCS in operation - Core (%)	ETCS in operation - Extended Core (%)	ETCS in operation - Comprehensive (1) (%)
Luxembourg	216	207	0	92%	100%	100%
Belgium	2 387	1 683	854	79%	66%	58%
Slovenia	987	389	0	72%	24%	0%
Czechia	3 200	1 062	554	46%	14%	17%
The Netherlands	2 513	354	0	36%	0%	3%
Austria	3 028	456	106	34%	5%	0%
Denmark	1 076	386	272	33%	N/A	56%
Hungary	3 667	597	255	29%	6%	6%
Spain (*)	14 672	3 011	505	28%	0%	7%
Slovakia	1 578	135	0	19%	0%	0%
Italy	11 622	998	186	17%	1%	0%
Sweden	5 240	588	126	15%	N/A	0%
Poland	10 261	737	143	15%	0%	0%
Bulgaria	2 437	209	0	12%	0%	0%
France	17 560	1 076	50	10%	3%	2%
Croatia	2 048	54	0	9%	0%	0%
Germany	15 116	445	102	5%	0%	0%
Romania	5 742	40	0	1%	0%	0%
Portugal (*)	3 216	0	0	0%	0%	0%
Greece	3 047	0	0	0%	0%	0%
Estonia (*)	1 158	0	0	0%	0%	0%
Lithuania (*)	1 986	0	0	0%	0%	0%
Latvia (*)	1 623	0	0	0%	0%	0%
Finland (*)	3 813	0	0	0%	0%	0%
Ireland (*)	1 796	0	0	0%	N/A	0%
TOTAL EU-27	119 988	12 426	3 153	17%	3%	3%

(*) Member States having most lines that are isolated networks

(1) Comprehensive network without considering Core or Extended Core network



Share of rail network equipped with ERTMS, %

Graph 8

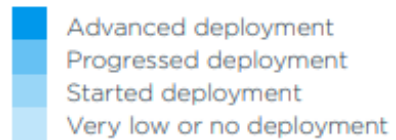
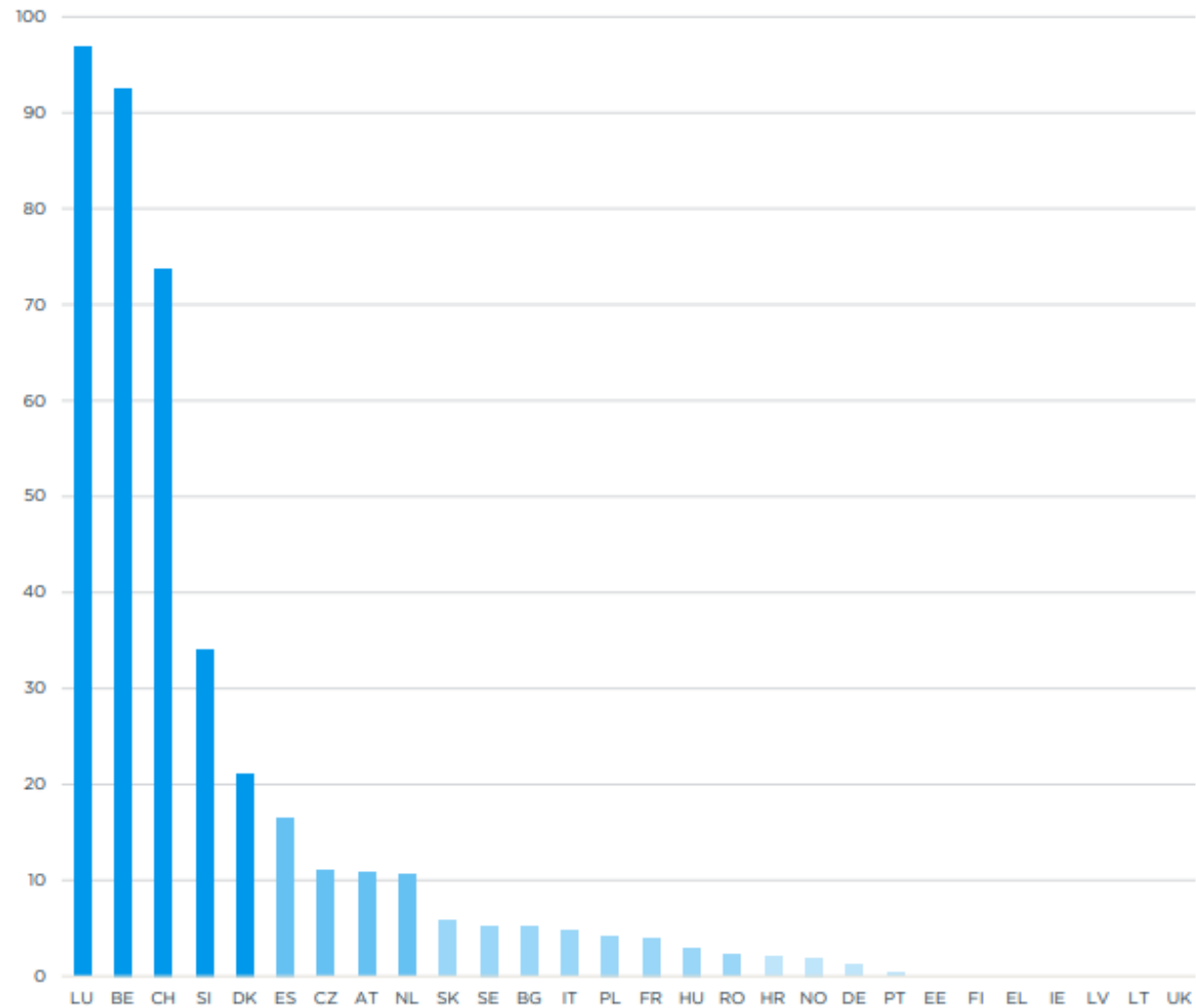
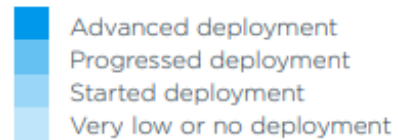
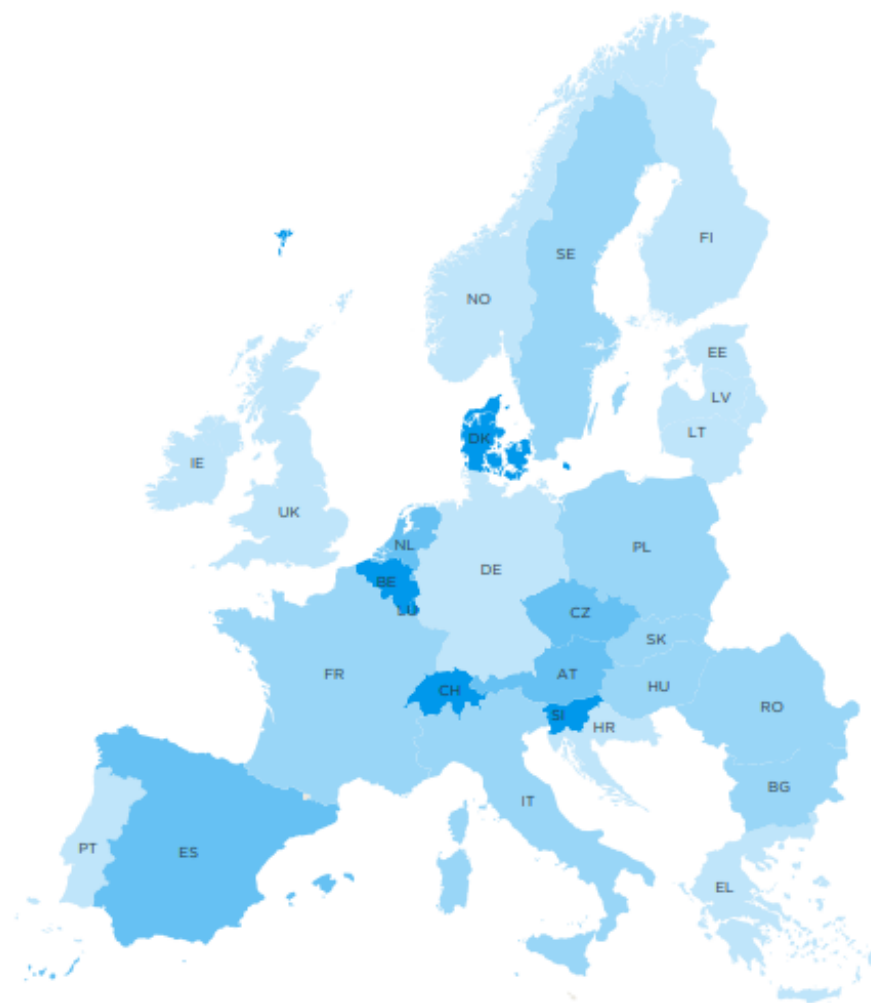


Figure 8



Why?

- Fragmented roll-out, national "bottom-up", different version.
- No standardization, no Single Market benefits, small players locked out.
- Onboard retrofit costs: Doubled (2018–2023).
- Trackside upgrades: High costs, slow approvals, complex approval processes.
- Political pressure: Copenhagen Declaration



Known solutions

Mature TSIs

Harmonisation of ERTMS
in depth and scope

Industrialisation

Reduce variability
Standardise products

Predictable Partnership

Collaborate, Commit,
Consensus

Clear Migration Plan

Innovations compatible
with past versions



New proposals for acceleration



New ERTMS 'SERA' Label

- Full compliance with target system (no national specificities)
- Higher chances for EU Funding



Common template for ERTMS procurement

- European Blueprint
- Faster deployment and lower costs



ERA Fast Lane for ERTMS Approval

- Faster Trackside Approvals
- Simplification of ERTMS deployment



ERTMS?

“Everything Really Turns Much Simpler”

“Eco-Reality Triggers More Standardisation”

“European Rail Takes Money Seriously”

“EU Ready for Tough Military Situation”



Thank you



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Slide 3: photo, Jon Worth

