



High-Speed Rail Communication

Key Deliverables



Vision



By 2040: a **European high-speed rail network linking capitals & major cities**



Much **shorter travel times** on main routes

For example: *Madrid-Lisbon: 9h → 3h*

Prague-Vienna: 5h → 2h15



Affordable and competitive services: a sustainable alternative to short-haul flights & long car trips



Industrial global leadership for Europe's rail supply industry



Key deliverables

- **Binding milestones:** Corridor Implementing Decisions (2027) for coherent infrastructure priority setting and investment planning on the network - covering speeds, funding and financing
- **Mobilise financing:** New EU Financing Strategy supported by investors' commitments in a 'HSR Deal" by 2026
- **Rolling stock & facilities:** Enable innovative financing for rolling stock and review/enforce fair access to service facilities (2026)
- **Interoperability & safety:** adopt new ERTMS plan and propose revised ERA Regulation to boost digitalisation, safety & efficiency (2026)
- **Passenger focus:** Propose new legislation to simplify ticketing and strengthen protection for multi-operator trips (2026)



Flagships

- 1 The EU high-speed network – need for acceleration and harmonisation
- 2 An attractive and competitive framework for rail services
- 3 A competitive, harmonised and innovative EU rail sector
- 4 An effective governance for high-speed rail





The EU high-speed rail network – need for acceleration and harmonisation

- Accelerating the roll-out of national and cross-border infrastructure
- Boosting investments for high-speed rail
- Better resilience and reduced environmental impacts of construction and operation

Financing needs

Rail infrastructure investments to date:

Nearly **€40 billion/year**

Incl.



€100 billion

already invested via CEF,
Cohesion, Recovery and
Resilience Facility (RFF),
InvestEU guarantee.



€40 billion

EIB lending since
2016



National support,
National
Promotional Banks
and Institutions
(NBPIs) and
private financing

High-speed rail investment needs:

€345 billion

to complete the TEN-T
high-speed rail network by
2040.

€546 billion

for 250+ km/h
network by
2050.



Benefits outweigh costs:
**€750 bn net positive
societal return**



Financing strategy

Financing Strategy

- **More EU funding** (New CEF: €51.5 bn)
- **Blending sources of revenue:** i.e. ETS revenues, cross-financing from road, InvestEU guarantee, EU green bonds, European Competitiveness Fund
- **Private capital mobilisation**
- **Crowd-in private investors**
- **Provide advisory services**
- **Promote best practices**

under preparation

Strategic dialogue

with Member States, industry, investors, NBPIs, EIB

launched by the end of 2025

High-Speed Rail Deal

formalising investor pledges

to be signed at Connecting Europe Days, Sept 2026





An attractive and competitive framework for rail services

- Capacity allocation that works for cross-border services
- Supporting the procurement of rolling stock
- Encouraging fair and proportionate track access charges
- Ensuring access to service facilities and rail-related services
- Improving rail ticketing
- Making rail travel more affordable
- Strengthening connections with other modes of transport



A competitive, harmonised and innovative EU rail sector

- Improving interoperability of rail infrastructure and rolling stock
- Research and coordination for competitiveness, safety and security



An effective governance for high-speed rail

- Empowering European governance
- Monitoring and reporting progress



Timeline

2025

- **Communication adopted** (Nov)
- Launch of **strategic dialogue** for financing leading to a “High-Speed Rail Deal” in 2026
- **As of 2025** Support Member States with **renewables deployment & noise action plans** (Commission notice)
- Launch a **consultation process** led by Corridor coordinators

2026

- **Adopt European transport corridor work plans** (mid-2026), identifying key bottlenecks and measures for their removal
- Review **Streamlining Directive** (permitting & procurement)
- Coordinate **financing strategy** (HSR deal, EU budget, national, private)
- From 2026, facilitate **rolling stock purchase & leasing** (new instruments, State aid compliance)
- As of 2026, facilitate **access to advisory services** (Commission + EIB)
- **Prioritise high-speed rail projects in CEF** reflow call
- From 2026, **boost climate resilience & green procurement** with EU funding
- Propose new legislation on **ticketing & stronger passenger rights**
- By 2026, **identify investment priorities in 40 airports + multimodal hubs**
- **Review rules on access to service facilities**
- By 2026, **propose a revised ERA Regulation** to strengthen safety, digitalisation and cost-efficiency
- Adopt **new ERTMS deployment plan**
- Propose revised **European Union Agency for Railways Regulation**
- Signing of the “**High-Speed Rail Deal**”
- Request ERA to set out **requirements for new high-speed trainsets**
- Launch dedicated **Europe’s Rail call**: next-gen trainsets (multi-network)
- Propose **revised driver training & certification rules**
- By 2026, **set up a scoreboard to monitor progress** on HSR
- As of 2026, **hold stakeholder roundtables** on key city links to tackle technical, facility, capacity, and track access charges issues
- As of 2026, move **Rail Supply Industry competitiveness expert group discussions to the political level**

2027

- Set **binding timelines for bottleneck removal** in Corridor Implementing Decisions & identify priority of **very high-speed** sections
- Propose legislation on **rolling stock resale & anti-scraping**

2028

- By 2028, develop **harmonised life-cycle & climate resilience assessment methods** for transport infrastructure projects





Thank you!

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