



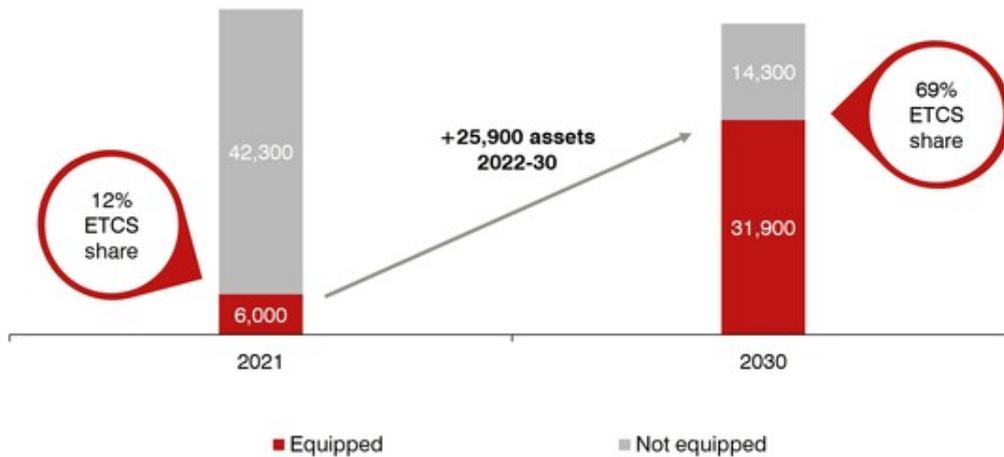
**[02.06.2022] Rail infrastructure: digital expansion with ETCS markedly too slow – Germany and France are slowing down momentum**

Real interoperability, a network capacity increase and the desired entry into the automation of the rail system is only possible through a comprehensive implementation of the ETCS (European Train Control System). Nevertheless, specific plans do not envisage a widespread roll-out until after 2030. In its new study “[ETCS DEVELOPMENT UNTIL 2030 IN EUROPE 2022](#)”, SCI Verkehr shows: even if the projects and political decisions known today are implemented according to plan, the share of equipped lines will be significantly below 50% in 2030. However, almost 70% of rail vehicles will have to be equipped. SCI Verkehr examines this tension and its implications for the increase in rail performance for 10 core markets as well as the European market as a whole.

The comprehensive ETCS roll-out in Europe has so far fallen far short of expectations. The current and medium-term focus is on equipping the European rail freight corridors by 2030. The EU member states are obliged to achieve this and accordingly receive extensive subsidies from the EU. Therefore, most countries are focusing their activities on equipping these corridors - albeit still with varying degrees of commitment.

The newly published study analyses the current state of track and rolling stock equipment in 10 focus countries as well as in the overall European market and shows that first movers such as Switzerland, Denmark and Belgium are implementing ETCS as a standard while large rail markets such as Germany and are much slower at a comprehensive implementation. Although a significant increase in the degree of equipment on the track is expected by 2030, it will take considerably longer until the system is used uniformly in all European markets and equipped vehicles have a real added value.

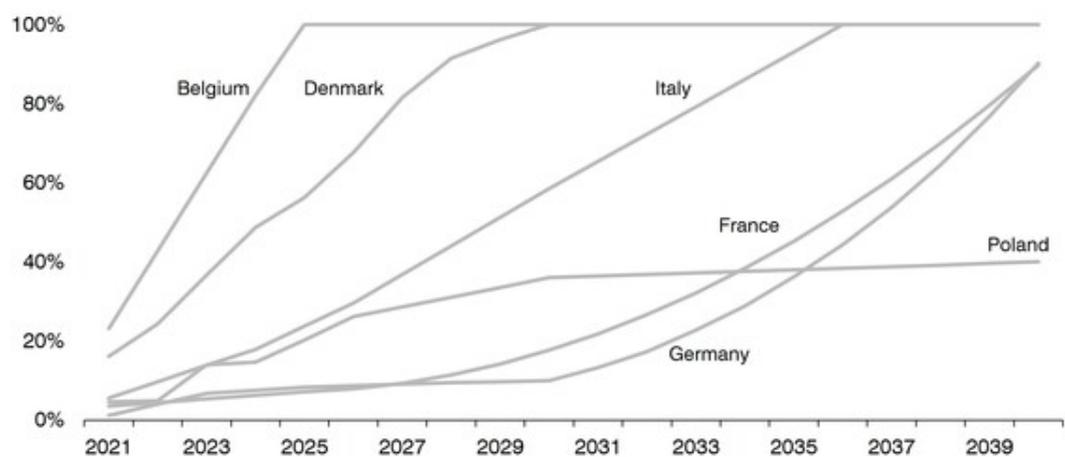
**Forecasted development of ETCS on-board equipment share in Europe**  
(number of assets assets)



Note: All values indexed

Especially countries like Germany, which only want to equip individual projects or corridors on the track side, are driving up the demand for vehicle equipment without being able to realise large-scale effects.

**Forecasted ETCS wayside equipment per selected country until 2040**  
(Kilometer of equipped wayside as share of the total railway network in %)



Note: All values indexed

© SCI Verkehr

**The study specifically includes:**

- An examination of the European market for ETCS re-equipment - both trackside and on-board.
- An analysis of 10 core markets as well as the remaining country markets as a synopsis. The analyses are based on concrete project planning in the individual markets, programmes and plans for future equipment and a derived estimate of the market sizes and their development.
- A differentiated analysis by type of transport for rolling stock: high-speed traffic, locomotives, multiple units
- A presentation of the respective market sizes in unit or kilometre numbers and turnover values

Mit freundlichen Grüßen

Susanne Müller

SCI Verkehr GmbH • Vor den Siebenburgen 2 • 50676 Köln • Germany  
+49 (221) 931 78-20 • s.mueller@sci.de • www.sci.de

