

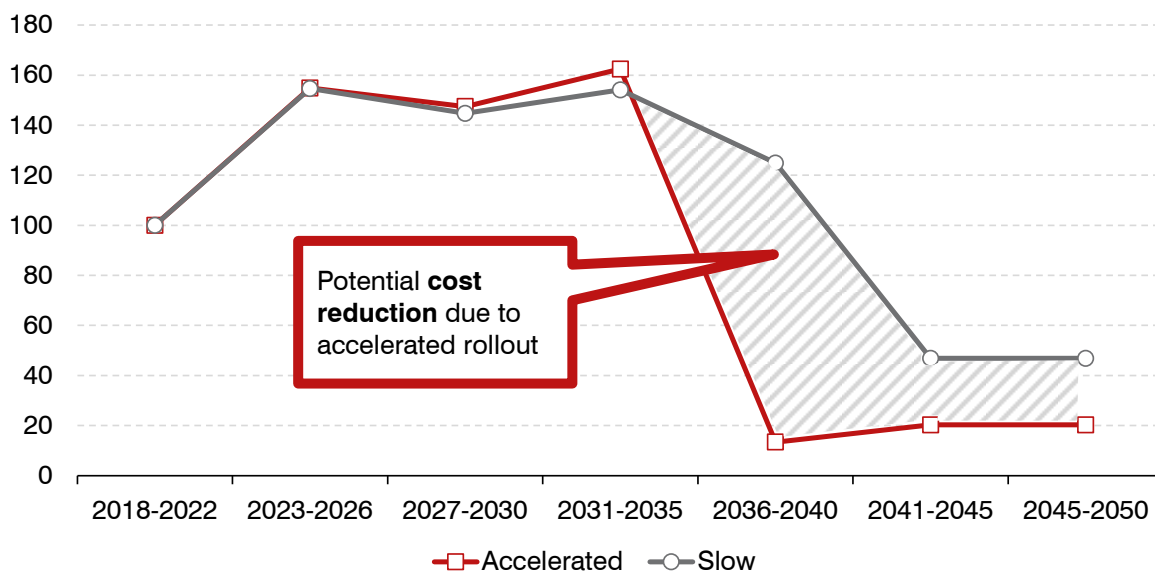


Learning from Italy: How Germany can also introduce the European Train Control System (ETCS) more efficiently

[January 2025] ETCS, the central component for the digitalisation of the railways, will be introduced much more effectively in Italy than in Germany, according to the latest "ETCS - EUROPEAN MARKET OUTLOOK" study by SCI Verkehr. This is because Italy is pursuing an ambitious goal with its ERTMS acceleration plan: The entire 16,800 kilometre rail network is to be equipped with ETCS by 2036. The Italian approach shows how a solid strategic plan can pave the way for faster and more cost-effective implementation: With a solid funding commitment, centralised coordination and a clear timetable for the decommissioning of the Class B system. While Italy and other European countries such as Belgium can gradually increase their network capacity earlier thanks to successful implementation, Germany faces considerable challenges in the introduction of ETCS: Even though it is planned to equip the entire network by 2043, a lack of funding, capacity bottlenecks at suppliers and inadequate coordination are hampering progress.

Looking at the European market as a whole, SCI Verkehr estimates the market volume for trackside ETCS equipment at EUR 25.7 billion by 2034. By 2040, around 110,000 additional kilometres of track will be equipped with ETCS, meaning that the total share in 2040 will be 63%. Currently, the share of on-board ETCS equipment in the vehicle fleet in Europe is 19%. SCI Verkehr expects this share to increase by 2034, with the ETCS-equipped fleet growing by a further 26,500 vehicles, either by retrofitting vehicles already in use or by delivering new vehicles with ETCS. This will increase the estimated ETCS share of vehicles to 74% and will result in a market volume of EUR 20.9 billion.

Indexed cost comparison on ERTMS rollout on the Italian network (Slow vs. Accelerated)



Source: Own visualisation based on data from Italian infrastructure manager RFI

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The study "ETCS - EUROPEAN MARKET OUTLOOK" is now available in English from SCI Verkehr GmbH (www.sci.de/shop/)

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