Trans-European transport network: development

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In accordance with Regulation (EU) nº 1315/2013, the Commission presents a progress report on implementation of the TEN-T network in 2014-2015.

The report assesses the state of the technical implementation of the TEN-T, and the financial investments made on the TEN-T. It paints a rather positive picture of the progress already achieved on the TEN-T core and comprehensive network. Indeed, large parts of TEN-T already show a high compliance level with TEN-T Regulation requirements.

Level of compliance of infrastructure: the report notes that the current state of implementation of TEN-T transport infrastructure in terms of compliance with the TEN-T Regulation requirements reaches between 75% and 100% for half of the currently available indicators, whereas for the other half it is still below 75%.

- Rail: the currently available data indicates that the standard track gauge of 1435 mm is present on 77% of the rail core network and 76% of the comprehensive rail network. As for electrification, around 81% of the TEN-T network is compliant with the TEN-T requirement. However, the ERTMS is in operation only on 9.5% of core network corridors sections as of end 2015, suggesting the clear need for more investment. In 2023, the ERTMS European Deployment Plan will be updated again setting out the precise implementation dates for the remaining part of the Corridors between 2024 and 2030.
- Roads: the results show that 74.5% of the core network is currently compliant with the standard, whereas only 58.1% of roads on comprehensive network fulfil the requirement. In the framework of the Alternative Fuels Directive 2014/94/EU, the Commission is currently analysing the national policy frameworks for the market development of alternative fuels and their infrastructure.
- Ports and inland waterways: the core network is already 95% compliant with regard to the CEMT IV requirements for class IV, 79.6% compliant with regard to RIS implementation and 68% in terms of permissible draught of 2.5 m. 100% of the seaports are connected to rail, but the connection of ports to the inland waterways of CEMT class IV is far from being compliant.
- Airports: the connection of airports to rail is still below 75% of compliance. In 2015, 23 core airports out of the 38 core airports (60.5%) that fall under obligation to be connected with the railway and road transport infrastructure of the trans-European transport network by 2050, are already connected to rail.

Financial investments made in the TEN-T: in the course of 2014 and 2015, the total investment made by the EU institutions from their financial sources (i.e. TENT/CEF, ERDF/CF and EIB loans) in TEN-T core and comprehensive network infrastructure amounted to EUR 30.67 billion in all 28 Member States. In addition to this, some EUR 1.1 billion of EU financial assistance was allocated under grant agreements to studies' projects in 2014 and 2015.

With regard to modal shares, the highest investment volume with respect to EU grants altogether is reported for rail which absorbed as much as 51.5% of total EU expenditures in the TEN-T network in 2014 and 2015. The share of road infrastructure investment reached 30.6% of total expenditure, followed by 9.2% for ports and Motorways of the Sea, 5.5% for airports (including SESAR), 2.1% for multimodal infrastructure and 1.1% for inland waterways.

In all, the Commission feels that in most cases significant improvements are still required and significant investment needed to reach the objectives of the TEN-T Regulation, particularly regarding inland waterways. While transport infrastructure needs are estimated at about EUR 1.3 trillion per year at the global level2 and around EUR 130 billion per year at the European level, the average investment levels in the EU are well below EUR 100 billion since the beginning of the crisis.

Conclusion: the report concludes that the first two years of implementing the new policy approach show that a wide range of different instruments have been successfully put in place in order to realise the TEN-T. In future reports, the level of investment at Member States' level needs to be analysed in detail as to complete the above picture in terms of investment priorities and financial needs in relation to the technical compliance of the network.

The progress made in implementing projects for that purpose now needs to be carefully and continuously monitored so as to ensure that the core network, including its core network corridors, will be completed by 2030 and the comprehensive network by 2050.