

Atlantic

European Transport Corridor



Work Plan 2026
of the **European Coordinator**

François Bausch

TRANS-EUROPEAN TRANSPORT NETWORK

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Acronyms and Abbreviations

AFIR	Alternative Fuel Infrastructure Regulation
AVEP	Alta Velocidad(e) España-Portugal
CEF	Connecting Europe Facility
CNC	Core Network Corridors
CTC	Centralised Traffic Control
EC	European Commission
EIA	Environmental Impact Assessment
eFTI	Electronic Freight Transport Information
EMS	European Maritime Space
EMSWe	European Maritime Single Window environment
ERTMS	European Rail Traffic Management System
ETC	European Transport Corridor
ETCS	European Train Control System
ETS	Emissions Trading System
EU	European Union
HSL	High-Speed Line
HSR	High-Speed Rail
ITS	Intelligent Transport Systems
IWW	Inland Waterway
KPI	Key Performance Indicators
LNSO	Ligne Nouvelle du Sud-Ouest
LNPN	Ligne Nouvelle Paris Normandie
MFT	Multimodal Freight Terminal
MPH	Multimodal Passenger Hub
NIP	National Implementation Plans (ERTMS)
OPS	Onshore power supply
PPP	Public Private Partnership
RAG	Rail Advisory Group
RFC	Rail Freight Corridor
RIS	River Information Services

RRT	Railroad Terminal
SAF	Sustainable Aviation Fuels
SSTPA	Safe and Secure Truck Parking Area
SULP	Sustainable urban Logistic Plans
SUMP	Sustainable Urban Mobility Plans
TAG	Terminal Advisory Group
TEN-T	Trans-European Transport Network

Country Codes after ISO 3166:

DE	Germany
ES	Spain
FR	France
IE	Ireland
PT	Portugal

Executive Summary

This Work Plan presents the strategic roadmap for the implementation of the Atlantic European Transport Corridor. It is the first Work Plan for the Atlantic European Transport Corridor and the sixth for the Atlantic alignment since the launch of the TEN-T Core Network Corridors in 2013. It guides the coordinated development of infrastructure and services, identifies **remaining barriers** and **defines priorities and milestones** for completing the network by 2030 and 2040.

The Atlantic Corridor plays a strategic role in the European transport system. It connects the Atlantic façade of Europe — including major ports and industrial regions in Portugal and Spain — with France, Ireland and Germany, linking maritime gateways, logistics platforms and urban nodes and supporting global trade flows and the European single market.

At the same time, the Corridor is becoming one of Europe's major rail axes. Key high-speed rail programmes in Portugal, Spain and France — including Lisbon–Madrid, Madrid–Paris (via the Y Basque and LNSO), Lisbon–Porto and Bordeaux–Toulouse — will progressively strengthen connectivity between the Iberian Peninsula and the rest of Europe. In the extended core network, Porto–Vigo and Aveiro–Salamanca are also important. Improving freight interoperability and port–hinterland connections remain essential to support efficient and sustainable logistics chains.

Important progress has already been achieved along the Corridor, with several railway, inland waterway and port projects completed in recent years and generally strong infrastructure compliance. Nevertheless, challenges remain, particularly regarding rail interoperability.

The Work Plan is organised in four chapters.

- **Chapter 1** introduces the updated TEN-T policy framework and the role of the European Coordinator.
- **Chapter 2** presents the Corridor alignment and assesses compliance across all transport modes.
- **Chapter 3** analyses the deployment of the Corridor between 2030 and 2040, identifying bottlenecks, missing links and interoperability challenges.
- **Chapter 4** sets out the Coordinator's priorities and recommendations, focusing on rail interoperability, the completion of the high-speed network and improved multimodal connectivity.

As European Coordinator, I have translated these priorities into a **milestone plan** identifying the key actions required to remove the remaining barriers to completing the Corridor by 2030 and 2040. It focuses on the most important cross-border and national projects, in particular major railway investments and strategic connections to ports and airports.

This milestone plan will serve as the basis for a future **Corridor Implementing Decision**, through which Member States will commit to coordinated timelines, implementation and governance, ensuring that national investments deliver a coherent European transport corridor.

The Work Plan is supported by annexes providing detailed information on infrastructure compliance, project portfolios and funding.

Delivering the Atlantic European Transport Corridor is essential for strengthening Europe's connectivity, competitiveness and transition towards a sustainable and resilient transport system. Achieving these objectives will require sustained political commitment, coordinated planning and continued investment.

1. A new generation of Corridor Work Plans

In 2024, the European Commission adopted a renewed and more ambitious vision for the Trans-European Transport Network (TEN-T) through Regulation (EU) 2024/1679 (TEN-T Regulation), marking a decisive shift in European transport policy. Prompted by recent global disruptions and the Union's environmental and sustainability objectives, the revision reshapes how transport infrastructure is planned, delivered and operated. It introduces higher quality standards and strengthens the multimodal and interoperable nature of the network, replacing the former Core Network Corridors with a new generation of European Transport Corridors (ETC) better aligned with Europe's geopolitical, economic and security priorities.

The TEN-T Regulation reinforces requirements on urban nodes, multimodal integration and cross-border connectivity, while also strengthening resilience, climate action, digitalisation and dual-use readiness. It introduces new obligations, including Sustainable Urban Mobility Plans for urban nodes and market and prospective analyses for Multimodal Freight Terminals by 2027. Member States operating non-standard rail gauges are also required to develop track gauge migration assessments to enhance interoperability.

As European Coordinator ⁽¹⁾, my role is to translate these objectives into coordinated and practical action with Member States, infrastructure managers and operators, taking into account the specific realities of the Atlantic space. My mandate, which began in September 2025, builds on the substantial work carried out since 2013 by Professor Carlo Secchi, whose contribution to the development of the Atlantic Corridor is gratefully acknowledged.

The Atlantic ETC plays a pivotal role as an Atlantic gateway for the European Union. It connects major maritime ports, industrial regions and urban centres across Portugal, Spain, France, Ireland and Germany, linking the Atlantic façade with the wider European transport network, while also serving as a strategic interface with global trade routes. The outermost regions of the Canary Islands further reinforce this dimension. Furthermore, the maritime links on the Corridor between Ireland and France/Spain represent an important cross-border route for industry sectors with time sensitive goods and add to the resilience of the overall maritime transport system between Ireland and Europe. The maritime component of the Corridor is therefore a key enabler of economic competitiveness, supply chain resilience and strategic autonomy.

At the same time, the Atlantic Corridor is a major high-speed rail axis, connecting cities such as Lisbon, Madrid, Valladolid, Bilbao, Bordeaux, Toulouse and Paris.

⁽¹⁾ Commission Decision (EU) 2025/1874 of 12 September 2025 amending Decision (EU) 2024/2383 as regards the designation of European Coordinators for the Atlantic, Rhine - Danube and Baltic Sea - Black Sea - Aegean Sea European Transport Corridors and the laying down of the detailed arrangements for the performance of their mission and tasks.

Ensuring the timely delivery of key cross-border links, notably Lisbon–Madrid and Paris–Bordeaux–Madrid, remains a priority. High-speed rail development must progress in parallel with the modernisation of multimodal passenger hubs, including major airports and railway stations. In parallel, completing the rail infrastructure required for efficient freight transport remains essential, in particular to strengthen port–hinterland connections and support competitive combined transport chains.

Interoperability is a cornerstone of successful Corridor implementation. The TEN-T Regulation establishes the European standard track gauge for new railway lines, while allowing temporary exemptions and requiring migration assessments. Both Portugal and Spain are currently preparing such assessments, which will require close monitoring and coordination. In this context, I consider that the progressive development of a high-speed rail network based on the European standard gauge is essential to ensure seamless services and fair competition across the Corridor.

In light of the evolving geopolitical context and the importance of military mobility, ensuring interoperable rail access to Atlantic ports in the Iberian Peninsula is of strategic importance. In my view, the Lisbon–Madrid high-speed rail line should be developed as a priority in European standard gauge, paving the way for a gradual migration of the wider high-speed network in the region.

A central task of my mandate is the preparation of this Work Plan, which serves as the principal roadmap for guiding and monitoring the implementation of the Corridor. It provides a concrete and actionable framework to support investment planning, prioritisation and cross-border coordination, particularly where European added value is greatest.

This Work Plan is aligned with key EU policies, including the European Green Deal, the Sustainable and Smart Mobility Strategy and the Alternative Fuels Infrastructure framework, as well as initiatives such as Military Mobility. It is of particular importance as it is the only Work Plan adopted ahead of the 2030 deadline for completing the TEN-T core network. While some sections are expected to be completed beyond 2030, further delays, notably on the cross-border section between Spain and France, are not an option.

Finally, I will continue to use the Corridor as a platform for dialogue and cooperation among stakeholders. Delivering the Corridor requires translating strategic objectives into concrete projects, which depends on strong engagement from the five Corridor Member States ⁽²⁾ – France, Germany, Ireland, Portugal and Spain – together with infrastructure managers, ports, airports, operators and regional actors. Through the Corridor Fora, working groups, bilateral exchanges and regular field visits, this platform supports coordination, addresses implementation challenges and helps ensure that the development of the Corridor

⁽²⁾ without prejudice to the Article 8.5 of the TEN-T Regulation.

reflects both European priorities and operational realities. I wish to thank all Atlantic stakeholders for their continued engagement in delivering our common objectives.

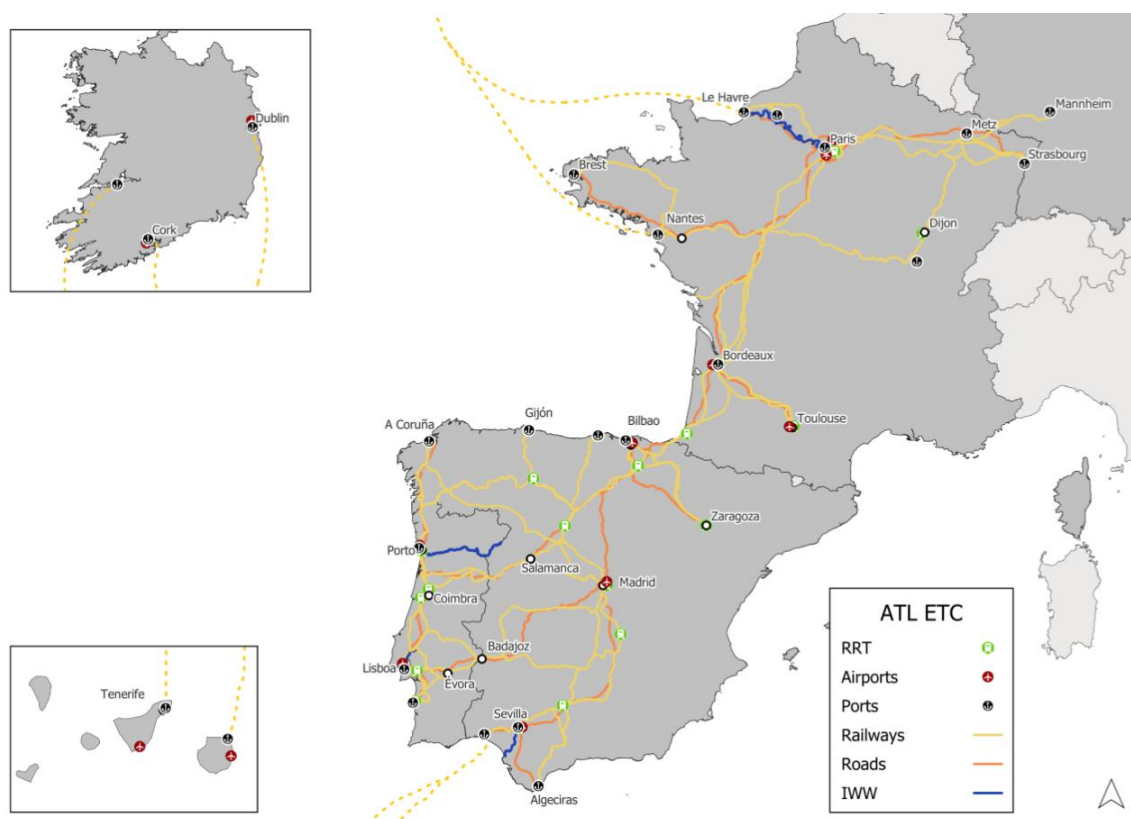
2. The Atlantic Corridor

2.1. Corridor Alignment

The Atlantic European Transport Corridor crosses five EU Member States, connecting major ports along its alignment. It links major ports with inland nodes, while also incorporating maritime links to Ireland and the Canary Islands. Its backbone is an integrated rail system combining high-speed passenger and freight lines, supported by multimodal connections. Compared to the former Core Network Corridor, the new alignment better reflects operational needs and future demand, including through the extended core network to be completed by 2040.

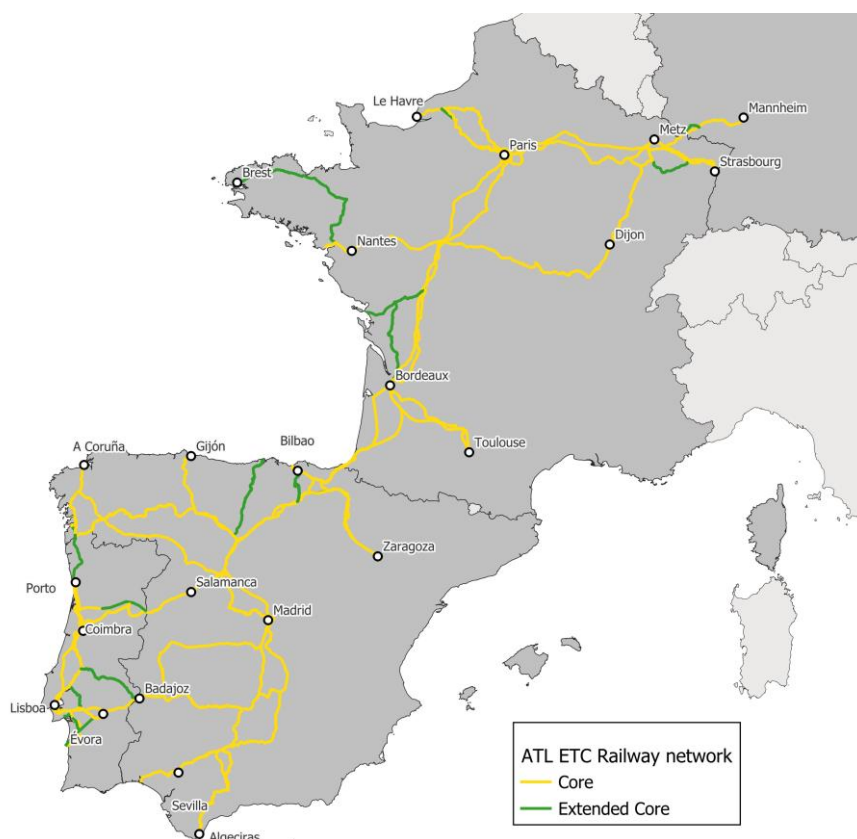
Figure 2-1 and Figure 2-2 present the Corridor alignment and its core (2030) and extended core (2040) network, as defined in Regulation (EU) 2024/1679.

Figure 2-1: ATL Corridor Alignment and transport nodes, Regulation (EU) 2024/1679



Source: TIS based on TENtec

Figure 2-2: ATL Corridor Core (2030) and Extended Core (2040) rail network



Source: TIS based on TENtec

2.2. Progress achieved

The current status of the existing Atlantic Corridor infrastructure in terms of compliance with TEN-T requirements is good, with variations against the various modes of transport.

As regards railways, three track gauges coexist on the Atlantic Corridor: the Irish gauge (1 600 mm) ⁽³⁾, the Iberian gauge (1 668 mm) and the European standard gauge (1 435 mm), creating interoperability challenges. Under the TEN-T Regulation, non-standard-gauge networks are classified as “isolated networks” and are therefore not subject to certain standards and requirements. However, although not required to do so, they generally strive to achieve equivalent standards across their networks. In this context, the present Work Plan will

⁽³⁾ In accordance with Article 65 of Regulation (EU) 2024/1679, the provisions related to European standard nominal track gauge of 1 435 mm for rail in Article 17 shall not apply to Ireland, islands and outermost regions.

assess the technical status of those isolated networks, rather than their compliance with mandatory standards.

On the Atlantic Corridor **railway passenger network**, key preparatory milestones have been achieved for major infrastructure projects such as the **Lisbon–Porto high-speed line** ⁽⁴⁾, and the **phase 1 (Bordeaux-Toulouse-Dax) of the *Ligne Nouvelle du Sud-Ouest* (LNSO) project** ⁽⁵⁾. In Spain, construction is also progressing on the **Y Basque high-speed network**, while the **Valladolid–Burgos** high-speed section and the **Pajares Base Tunnel** have recently entered into service (see Annex 3, Chapter 7 for more detail).

The Atlantic Corridor **railway freight network** is fully compliant with axle load requirements and approximately 90% electrified. At the end of 2024, ETCS was in operation on 14% of the Corridor, and under construction on a further 9% of its extension, while GSM-R covered 46%. Technical status of **Multimodal Freight Terminals** with respect for 740 m train handling is progressing reaching by the end of 2025 a rate of 60%.

The **road network** is fully complete with TEN-T requirements, with widespread deployment of ITS across the Corridor.

Inland waterways are largely compliant, with RIS deployed on almost all sections except the Tagus River. Compliance is high for bridge height and navigability, while some bottlenecks remain on the Tagus. **Inland ports** are generally compliant, though capacity for 740 m trains remains limited.

All the 20 **maritime ports** comply with TEN-T requirements for at least one Multimodal Freight Terminal open to all users and majority of ports dispose of the three types of handling capabilities at the port level. **Sixteen maritime ports** have a rail connection. The two ports of the Canary Islands are exempted of this requirement, while for Shannon Foynes in Ireland works for reinstatement of the line are ongoing. So far, no plans for connecting the port of Cork exist.

Since the last Work Plan in 2023 until the end of 2025, 14 projects have been completed, representing EUR 1.2 bn of investment. These include railway upgrades in Portugal and Spain (notably sections of the Lisbon–Madrid corridor and the Beira Alta line as well as the Pajares Base Tunnel), inland waterway improvements on the Seine, and projects enhancing port connectivity and road safety.

⁽⁴⁾ The Environmental Impact Assessments for the first two phases of the Lisbon-Porto high-speed line, encompassing the section between Carregado and Porto (PPP1, PPP2, and PPP3) have been issued, with the concession contract for PPP1 signed on 29 July 2025, and the international tender for PPP2 relaunched in January 2026. Preparatory studies have also been launched for the second phase of the Lisbon-Madrid high-speed connection, which includes the third Tagus crossing.

⁽⁵⁾ The environmental approval procedures and associated preparatory studies have been approved in February 2026.

3. 2030-2040 Corridor deployment forecast

The assessment of the Atlantic European Transport Corridor investment portfolio shows that, despite the substantial progress already achieved, full compliance of the core network will not be reached by the 2030 milestone. Nevertheless, key stretches of the Corridor are expected to be completed before the end of the next European Multiannual Financial Framework in 2034. This situation is primarily explained by the absence of certain projects from national and stakeholder agendas, the high complexity of several major infrastructure schemes and delays encountered during procurement and contractual phases.

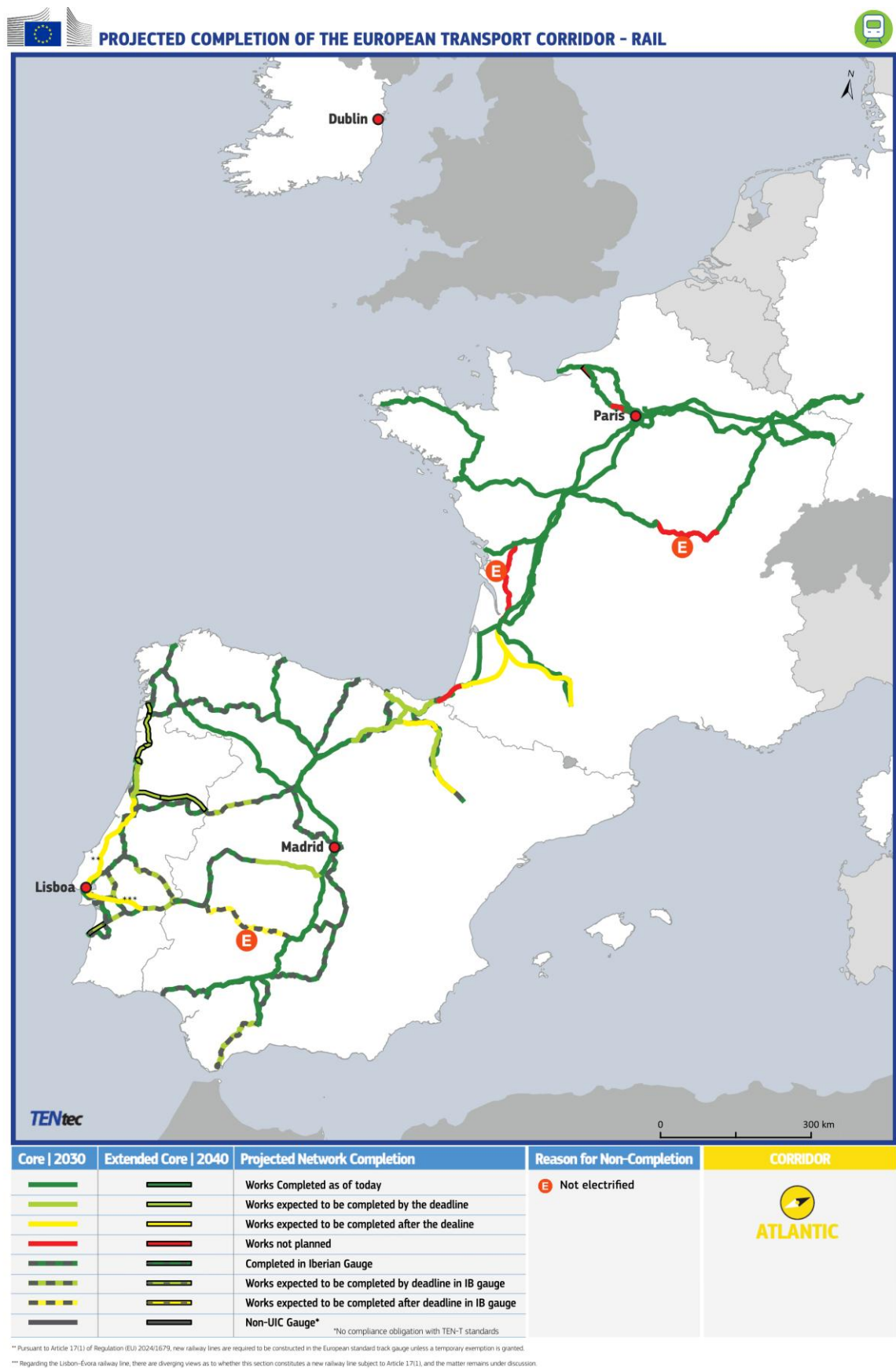
This chapter focuses on the remaining infrastructure gaps across all transport modes, with particular attention to the 2030 and 2040 targets. It highlights the main bottlenecks that hinder the full realisation of the Corridor. In addition to identifying persistent bottlenecks, the chapter also addresses projects considered to be at risk, meaning projects that are unlikely to meet the TEN-T milestone deadlines. The identification of projects at risk is based on a multicriteria analysis, taking into account factors such as planned completion dates, alignment with the 2030 and 2040 deadlines, project maturity, progress in planning and works and the security of funding sources.

3.1. Persisting bottlenecks

3.1.1. Rail

Figure 3-1 illustrates the projected future compliance of selected railway infrastructure parameters along the Atlantic European Transport Corridor, namely axle load and electrification, as well as a status on isolated networks for the milestone years 2030 and 2040. These so-called political maps are derived from a comparison between currently identified bottlenecks or non-compliant sections and the set of ongoing and planned investments known at this stage. The status regarding ERTMS and train length are not included in this political map.

Figure 3-1: Rail compliance and technical progress in the Atlantic Corridor



Source: TIS based on TENtec

3.1.1.1. High-Speed Rail

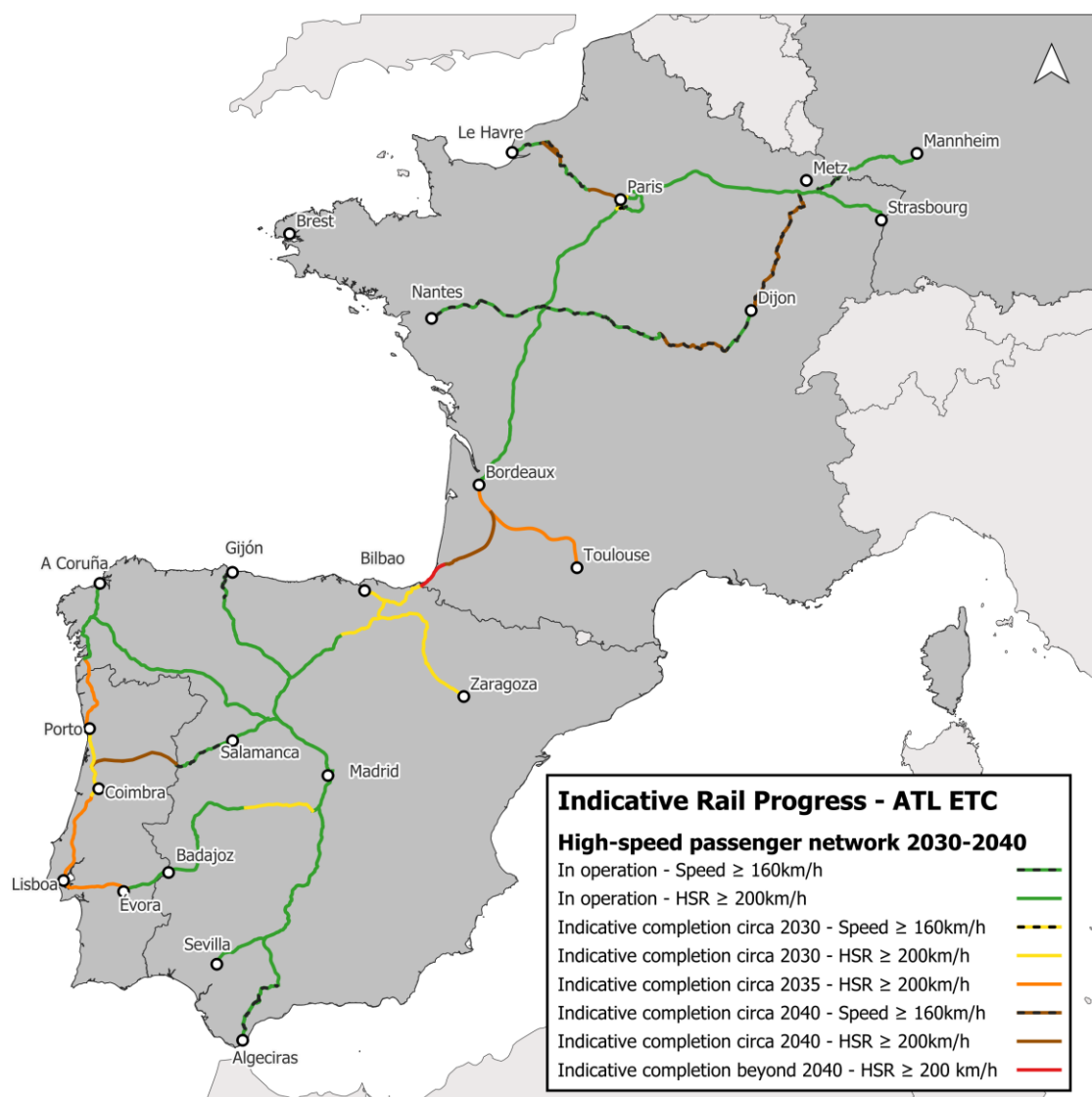
In November 2025, the European Commission launched a comprehensive Action Plan for High-Speed Rail ⁽⁶⁾ aimed at accelerating the development of a unified European high-speed rail network. The initiative seeks to improve cross-border connectivity, reduce travel times, strengthen Europe's competitiveness and support the decarbonisation of long-distance passenger transport.

Within this framework, high-speed rail plays a central role in the Atlantic European Transport Corridor. Major infrastructure programmes are currently under implementation in Portugal, Spain and France, including the Lisbon–Madrid cross-border connection, the Lisbon–Porto high-speed line, the Y Basque network and the LNSO. These projects form the structural backbone of the future high-speed network along the Corridor.

Figure 3-2 illustrates the expected high-speed rail configuration of the Atlantic European Transport Corridor by 2040, showing both sections already in operation and those currently under development. It also shows that key stretches of the Corridor are expected to be completed before the end of the next European Multiannual Financial Framework in 2034, while others are largely delayed to the 2040 horizon.

⁽⁶⁾https://transport.ec.europa.eu/document/download/774e79c9-1ece-4514-8f16-a2b98049c82e_en

Figure 3-2: ATL Corridor high-speed passenger rail network and 160 km/h rail Outlook by 2040 ⁽⁷⁾



Source: TIS based on TENtec – indicative map

By 2034, subject to the elements below, a continuous high-speed rail corridor is expected to connect Lisbon and Paris, with the exception of the missing high-speed rail link Hendaye–Sud-Gironde, with onward continuation towards Strasbourg. This will mark a major milestone in the consolidation of high-speed passenger connectivity along the Atlantic European Transport Corridor.

⁽⁷⁾ The information and views set out in this section do not necessarily reflect the official opinion of the European Commission. The Commission does not guarantee the accuracy of the data included in the graphs and tables. The information does not affect potential exemption requests from Member States from the requirements of Regulation (EU) 2024/1679. It also does not take into account potential delays in the implementation of projects and does not prejudice the financial commitment of a Member State or the EU. Neither the Commission nor any person acting on its behalf may be held responsible for any use that may be made of the information contained in this document.

The completion date of Bordeaux-Dax/Toulouse high-speed rail (phase 1 of the LNSO) and the final section of the LNSO project between Dax and the Spanish border (phase 2 of the LNSO), currently not foreseen before 2040, must be specified in the forthcoming multi-annual programme law on investment in transport infrastructure in France. The delay of the project and especially the final phase 2 (cross-border) is likely to prevent the full realisation of the project's potential for modal shift, thus maintaining a capacity constraint on the cross-border interface. As a result, and considering the increased traffic coming from Spain (both freight and passengers), congestion risks may appear on the conventional line between Hendaye and Dax-Bordeaux, potentially limiting the full operational benefits of the high-speed network until the missing link is completed. In addition, it would also result in more capacity constraints on the already heavily congested railway node of Bordeaux and on the route through the Île-de-France region.

Further, the development of cross border local services and the delay of Phase 2 of the LNSO (Dax-border) implied the capacity expansion of the Hendaye station, namely the conversion of the terminal tracks (101 & 102) which are currently in Iberian track gauge into through-running tracks in EU standard connected to the network. The capacity expansion works of Hendaye station have been postponed until after 2030 to allow reciprocity of regional cross-border traffic from both Member States in this period.

Yet, the capacity expansion of Hendaye station is needed and maintaining Iberian gauge access desired by the stakeholders, which will require further studies and close cooperation between Spain and France.

All in all, the completion of Phase 2 of the LNSO at a later stage will *de facto* allow to release capacity on the conventional line.

Track gauge

In Spain, most of the existing high-speed rail network is already built for the European standard track gauge and all new high-speed lines currently under construction are being developed in standard gauge. Exceptions include the high-speed lines A Coruña–Vigo, Santiago de Compostela–Ourense and Badajoz–Mérida–Cáceres-Navalmoral de la Mata, which remain in Iberian gauge, equipped with polyvalent sleepers, allowing for potential future migration.

In Portugal, the new lines Lisbon–Porto, Porto–Vigo and Aveiro–Vilar Formoso (towards Salamanca) fall under the requirements of Article 17(1) ⁽⁸⁾. Regarding

⁽⁸⁾ Article 17(1) of Regulation (EU) 2024/1679 requires Member States to ensure that any new railway line on the core and extended core networks, including connections for which construction works had not started by 18 July 2024, is built to the European standard nominal track gauge. In addition, Article 17(3) requires Member States operating rail networks, or parts thereof, with a

the Lisbon-Caia high-speed line rail projects, it remains under discussion ⁽⁹⁾ if it should be subject to application of Article 17(1). While these lines may be constructed using the existing Iberian gauge, the Regulation requires that they ensure the possibility for 1 435 mm track gauge trains circulate on the infrastructure by 31 December 2030 for the core network and by 31 December 2040 for the extended core network. The Lisbon–Porto line, for which construction started in 2026, is currently being built in Iberian gauge using polyvalent sleepers, allowing for future migration to standard gauge. In the absence of an exemption request under Article 17, this infrastructure will need to ensure compliance with these requirements within the applicable TEN-T deadlines.

See also chapter 3.1.2 on migration plans.

Missing links

Two missing high-speed links are expected to persist along the Atlantic European Transport Corridor **by or after 2040**:

- **Core network section: “Dax-Spanish border” (Hendaye, France):** the final section of the LNSO high-speed line Bordeaux–Toulouse–Dax–Hendaye. While this project is included in the Atlantic Project List, no expected completion date has been defined. Studies are ongoing, notably the “Updated preliminary design studies for the new Dax–Spanish border line” are planned by June 2027 and the “Finalised preliminary design for the integration of the new Dax–Spanish border line into the existing railway network by the end of 2028”. National strategies currently indicate a timeframe for the total completion beyond 2040.
- **Extended core network section “Rouen–Yvetot” and core network section “Mantes la Jolie –Paris Saint-Lazare”, together forming the Ligne Nouvelle Paris Normandie (LNPN) in France:** this project includes the construction of a high-speed section between Rouen and Yvetot and a new 46.9 km line between Mantes-la-Jolie and Paris Saint-Lazare. Following renewed support from the Île-de-France region in early 2026, studies for the LNPN project have resumed.

track gauge different from the European standard to carry out, by 19 July 2026, an assessment of existing railway lines located on European Transport Corridors with a view to their possible migration.

⁽⁹⁾ Regarding the Lisbon–Évora section, there are diverging views as to whether it constitutes a new railway line within the meaning of Article 17 (1), and the matter remains under discussion

3.1.1.2. Rail freight and multimodal freight terminals

By 2030, despite progress to be achieved, the interoperability of freight transport will continue to be affected by bottlenecks. It is however important to stress that some TEN-T requirements due by 2040 might progress faster in some Member States than others. The objective of this chapter is to identify interoperability investments that should be prioritised on major freight origin-destination routes, hence helping operators to get improvement on their operations as soon as possible.

Electrification

- Electrification works are currently ongoing on the **Fuentes de Oñoro–Salamanca** section, expected to be completed by 2026, and on the **Algeciras–Bobadilla** line, with completion foreseen by 2030. Electrification of the **Mérida–Puertollano** section, which was incorporated into the TEN-T core network under the TEN-T Regulation revision of 2024, has already undergone substantial upgrades and is scheduled to be fully electrified by 2032, with electrification being the only major remaining requirement. The **Linha do Leste** electrification is expected to be completed by 2034 (extended core network).
- In contrast, in France, there are currently no projects addressing the electrification of the **core network section “Nevers–Montchanin–Chagny”** and the **extended core network section “Niort–Saintes–Ambarès”** sections. These sections therefore remain significant electrification bottlenecks on the Atlantic European Transport Corridor beyond 2040.

740 metres

France and Germany being fully compliant with this requirement, the possibility to run **740 m trains** in the main network is being progressively achieved in Portugal and Spain by the implementation of new siding tracks or extension of the existing ones. In Spain, this effort entails a system-wide upgrade from a legacy standard of around 500 m, with ongoing works across key axes such as Madrid-Alcázar-Córdoba-Bobadilla-Algeciras, Castejón-Alsasua and Línea 100 (Madrid-Irún), reflecting a coordinated national approach to enable 740 m operations.

In Portugal, the investments aimed at equipping Pampilhosa railway station with 750 meters-long tracks, as well as the new 750 metres refuge sidings north of Ovar, are expected to be completed by 2030. It is also expected that the investments on the Leixões line will have been completed with the stations of Contumil, São Mamede and Leixões being equipped with 750 metres-long tracks. These investments, together with the recently completed refuge sidings at

Francelos will allow to operate 740 metres-long freight trains between the ports of Aveiro and Leixões, and Pampilhosa.

However, on the following cross-border origin-destination, lack of coordinated investment persists for:

- **Leixões / Aveiro – Salamanca:** 740 m bottlenecks persist between the port of Aveiro and Leixões to Pampilhosa, and from the border Fuentes de Oñoro to Salamanca.
- **Sines / Lisbon – Madrid:** 740 m bottlenecks persist between Lisbon – Pinhal Novo and Badajoz-Puertollano-Manzanares. The Sines / Lisbon-Elvas connection will ensure compatibility with 740 m trains by 2030 with the conclusion of the modernisation of Linha de Vendas Novas and the duplication of the Poceirão-Bombel sections.

Further on the national sections, critical freight sections for the 740 m requirement are: Huelva/Algeciras – Manzanares; Galicia / Gijón – Valladolid; Madrid-Valladolid – Vitoria - Irún; Zaragoza – Vitoria. Works are ongoing along the alignment Alcázar-Córdoba-Bobadilla-Algeciras, Castejón-Alsasua and Línea 100 (Madrid-Irún).

Loading gauge

In line with the Regulation's emphasis on adequate infrastructure parameters for freight transport, including train length and operational capacity, ensuring suitable loading gauge conditions can support the efficient development of combined transport services along the Atlantic European Transport Corridor.

The revised TEN-T Regulation introduces a Key Performance Indicator with a 2040 horizon related to the capacity of the rail network to accommodate intermodal transport units such as semi-trailers.

In this context, Portugal and Spain have undertaken proactive steps to prepare key freight alignments for enhanced loading gauge conditions ahead of the 2040 horizon. The corridor Huelva – Sevilla / Algeciras – Córdoba towards Zaragoza is expected to be adapted to the TEN-T requirements by 2028, with Huelva-Córdoba entering already into service by September 2026. The section between Zaragoza and Vitoria is foreseen to become compliant by 2027 through Pamplona, while the Y Basque infrastructure is already being constructed with appropriate loading gauge conditions. Spain intends to have 90% of its core freight network adapted to the TEN-T loading gauge requirement by at least 2030.

In Portugal, the section Évora-Elvas is compliant with the TEN-T loading gauge requirement and the extension of this loading gauge profile to the connection between the port of Setúbal and Évora is currently under evaluation, with technical and feasibility studies in progress.

In France, projects are planned for the clearance of tunnel gauge between Hendaye and Île-de-France, which currently face several traffic restrictions. These interventions allow for the circulation of freight trains carrying standard semi-trailers up to 4 m high, loaded at a height of at least 27 cm above the top of the rail track, in line with the TEN-T requirement. Similar restrictions may occur on the section Paris-Châlons-en-Champagne. As part of measure 53 of the French National Rail Freight Development Strategy, a master plan for semi-trailer rail transport is to be published shortly. This plan will identify the actions to be implemented in the medium- and long-term to promote this type of rail service on the national rail network and along the Atlantic Corridor.

In Portugal, the rolling motorway services have been operational since early 2026 via the Linha do Leste, which already complies with TEN-T loading gauge requirements. As a result, rail transport services for semi-trailers are already operational in Portugal via the Leste line and will be in Spain by 2028. However, continuity towards and through France may continue to face residual bottlenecks.

ERTMS

ERTMS deployment (see Annex 2, Chapter 6.2 ⁽¹⁰⁾) will remain inconsistent along the Corridor.

By 2030, it will be possible to travel using ETCS on the entire core network of the corridor in Spain and Portugal, except for the section “Fuentes de Oñoro-Salamanca-Valladolid”, “Gijón-Oviedo” and “Merida – Puertollano”. The new high-speed lines from “Burgos to the border”, together with “Bilbao and Zaragoza to Vitoria”, as well as “Bordeaux-Toulouse” should also be equipped with ETCS by around 2035. The “Bordeaux-Dax” section (LNSO) and “Tours/Le-Mans – Paris” (LGV Atlantique), “Brest – Rennes – Nantes” (LNOBPL) and “Nantes – Angers - Sablé” should come shortly afterwards. The major bottlenecks regarding ERTMS located on the Corridor are therefore: “Hendaye-Bordeaux”, Le Havre-Paris”, “Tours-Dijon”, “Remilly – Forbach”.

Track gauge

Moreover, track gauge, particularly on mixed lines, remains a challenge for freight. The terminal in Vitoria will fulfil a major role in enabling the transshipment between two track gauges in more effective way.

See also chapter 3.1.2 on Migration plans.

⁽¹⁰⁾ The ERTMS data are based on the ERTMS work plan published in February 2026 and typically refer to a cut-off date of end 2024. Since then, the situation in some Member States may have evolved, sometimes also altering the projections for deployment in 2030 or beyond. More recent data will be published at the latest in the annual update of the ERTMS work plan.

Multimodal Freight Terminals

According to Article 36 (3) of the TEN-T Regulation, Member States shall identify the Multimodal Freight Terminals (MFT) by 19 July 2027 in the framework of their market and prospective analysis on MFTs. The Work Plan assesses, without prejudicing the provisions in Article 38 paragraphs 2 and 3 of the TEN-Regulation, the technical status of the current availability of the three handling capabilities: containers, swap bodies and semi-trailers. This assessment has only an informative purpose which does neither constitute an identification of single TEN-T terminals nor prejudice a later potential assignment to the TEN-T. The evaluation of compliance with the provisions in TEN-T Regulation for MFTs will take place once the market and prospective analyses of the Member States are available. This assessment applies to MFTs which are open to all operators and users in non-discriminatory manner, and that have connection to rail and carry out vertical transshipment.

All MFTs that are assessed under maritime and IWW ports are not included in this assessment. Therefore, the assessment in this chapter focuses only on RRTs of Annex 2 of the TEN-T Regulation.

Finally, with regard to meeting the requirements on 740-metre train length, the assessment is made inside the terminal. In addition, the assessment of the 740-metre train length requirement should be based on the ability to accommodate trains without operational manipulation or splitting. For this purpose, given that 740 m trains on the network include the locomotive with a length of approximately 20 m, MFTs with rail loading facilities of 720 m or more would be considered to meet the requirement. Moreover, the assessment of the electrification requirement considers electrification up until the terminal fence.

This chapter and chapter 6.4 therefore provide a provisional view on the technical status of the MFTs regarding the TEN-T requirements.

According to the assessment results for multimodal freight terminals along the Atlantic ETC, the most significant technical bottleneck to be complied by December 2040 according to Article 38(3) of TEN-Regulation relates to insufficient track length, which often prevents the assembly and handling of 740-meters freight trains without manipulation. This constraint has a direct negative impact on productivity and the competitiveness of combined transport services, especially where the main rail network allows for 740 m trains operations.

In particular, currently the following terminals require operational adaptations to accommodate trains of this length: Bayonne–Mouguerre and Strasbourg in **France** where the rail trackside infrastructure is already compliant; Alcazar de San Juan, Bilbao, León, in **Spain**; as well as Leixões and Lisboa-Bobadela and Sines in **Portugal**. A project is ongoing for the development of the European multimodal rail-road terminal of Bayonne-Mouguerre including railway access of 740 m. The overall provisional technical status of multimodal freight terminals along the Corridor is illustrated in in Annex 2, Chapter 6.4.

3.1.2. Rail Migration Assessment of the Iberian Peninsula

Spain ⁽¹¹⁾

In compliance with the provisions set out in Regulation 2024/1679 on the Union guidelines for the development of the trans-European transport network, the Ministry of Transport and Sustainable Mobility has carried out an assessment of the possible migration of the lines belonging to that trans-European network to the European standard gauge, which includes a socio-economic cost-benefit analysis of the measure.

After verifying that the exclusive migration of the trans-European network lines or the installation of a third rail on them is unfeasible or creates greater problems than those it aims to solve, it is concluded that the only technically viable solution that could work in a potential future scenario would be the migration of the entire national network to standard gauge. Therefore, this latter scenario has been studied in depth.

Based on these premises, the final socio-economic assessment of the measure was sent to the DG MOVE in July 2026. The conclusion of the evaluation is that the migration is highly unfavourable, as the benefits generated are far lower than the investments required to carry out the measure. In addition, the works would entail a very high number of service disruptions, possible incidents and delays on the Spanish railway network over a very prolonged period of time.

Therefore, in light of this analysis, the future perspective in the Iberian Peninsula will continue to be the coexistence of both track gauges. This situation has, however, been in place for many years, allowing the sector to progressively acquire experience and develop technological solutions aimed at minimising the operational impacts associated with gauge interoperability.

Building on this accumulated expertise, Spain will continue to focus on improving interoperability through targeted investments, technological innovation and operational optimisation, ensuring efficient connections with the European network while avoiding disproportionate socio-economic costs and major disruptions to railway services.

⁽¹¹⁾ These assessments submitted by Spain and Portugal in July 2026 have not been analysed by the European Coordinator and the European Commission yet.

Portugal ⁽¹²⁾

In fulfilment of the requirements set out in Article 17(3) of Regulation (EU) 2024/1679 (TEN-T), the Portuguese Government commissioned Infraestruturas de Portugal, S.A., the national railway infrastructure manager, to assess the feasibility of migrating its railway network to the standard track gauge of 1,435 mm.

This assessment was submitted to the European Commission's Directorate-General for Mobility and Transport in July 2026.

Based on the assessment of various gauge migration scenarios for the Portuguese railway network, it was concluded that the operational savings and potential benefits associated with gauge migration are consistently and substantially outweighed by the investment required for its implementation.

The analysis indicates that migrating the Portuguese railway network is not justifiable from a socio-economic perspective.

This is primarily due to significant technical constraints and operational challenges, namely the scale, duration, and intensity of the disruptions that such a transition would impose on railway operations over several decades.

Based on previous transport market studies and infrastructure assessments carried out within the Atlantic Corridor - which identified factors other than track gauge as the main barriers to rail growth - improvements in signalling, telecommunications, electrification, and network capacity remain critical to enhancing railway interoperability.

Moreover, any decision regarding the potential migration of the track gauge should only be taken as part of a coordinated approach with Spain's own migration plan.

Furthermore, it must be supported by more detailed cost-benefit analyses that fully account for disruption costs and the risks arising from prolonged line closures during migration.

Portugal reaffirms its commitment to developing an interoperable railway network and to maintaining a constructive dialogue to support a more integrated, efficient, and sustainable rail system.

3.1.3. Road

The Atlantic European Transport Corridor road network is fully compliant with TEN-T requirements, as all sections consist of either motorways or express roads. Nevertheless, some operational bottlenecks remain. In particular, along the express road providing access to the port of Sines, upgrading works to motorway are currently ongoing to further improve access to the port and enhance network performance.

⁽¹²⁾ These assessments submitted by Spain and Portugal in July 2026 have not been analysed by the European Coordinator and the European Commission yet.

Without prejudice to the above, the main road bottleneck of the Corridor is located at the Spain–France border, where daily traffic reaches around 11 000 trucks, with no effective and sustainable alternative until an efficient cross-border rail connection between both countries is in place. This highlights the need to address the Corridor from a multimodal perspective, ensuring a better balance between road and rail and reinforcing the role of rail freight as a complementary and necessary alternative.

3.1.4. Inland waterways

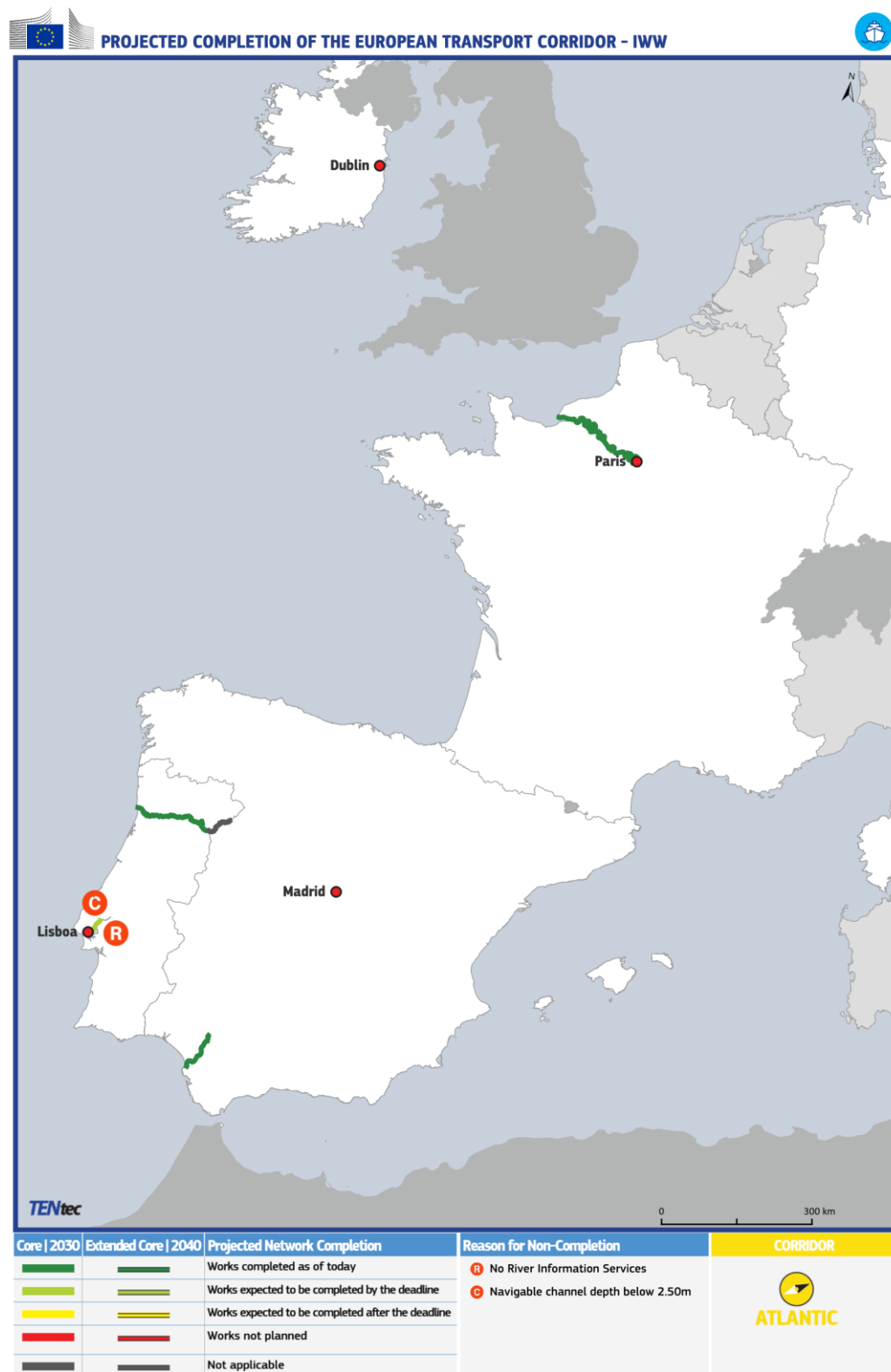
Figure 3-3 illustrates the projected future compliance of selected inland waterway infrastructure parameters along the Atlantic European Transport Corridor, namely minimum clearance under non-openable bridges, navigable channel depth and the deployment of RIS, for the milestone years 2030 and 2040.

By 2030, the inland waterway network of the Atlantic European Transport Corridor is expected to be compliant with TEN-T requirements. However, several persistent capacity bottlenecks remain which may limit the effective use of inland waterways for freight and passenger transport:

- **Douro:** The obsolescence of the river's five locks limits the potential to increase freight transport and raises safety concerns given the growing use of the river by passenger and tourism vessels, between Porto and Barca d'Alba peer. In addition, geometric corrections of the navigation channel are required at two locations to enable freight transport. Improved multimodal connections at port facilities along the river are also needed for capturing new freight traffic.
- **Tagus:** Dredging works are planned to ensure compliance with minimum navigable channel depth upstream Lisbon to Castanheira do Ribatejo, strengthening the inland waterway connection between the Port of Lisbon and its hinterland logistics platform. These works are expected to improve the regularity and reliability of inland navigation for containerised and bulk traffic, support modal shift from road to inland waterways and reinforce the resilience of logistics chains serving the Lisbon metropolitan area. Deployment of RIS on the Tagus River is also planned by 2030, further enhancing traffic management, navigational safety and operational efficiency along the Corridor.
- **Seine:** The main constraints relate to historic infrastructure in the Paris area, where bridge clearance restrictions cannot be overcome during certain periods of the year. Due to heritage protection requirements, structural interventions are not feasible.
- **Guadalquivir:** The Guadalquivir is a tidal river with high sedimentation levels, particularly near the mouth in the Doñana National Park and Bonanza areas, which constitutes the access fairway to the maritime port of Seville. This requires continuous dredging to maintain navigability, especially for larger vessels. The limited draught, of approximately seven metres, restricts access

for deeper-draught maritime vessels and constrains the range and volume of cargo that can be transported.

Figure 3-3: Overview of inland waterway compliance in the Atlantic Corridor by 2030 and 2040 ⁽¹³⁾



Source: TIS based on TENtec

3.1.5. Inland and maritime ports

The TEN-T Regulation specifies that "all possible efforts" shall be made regarding the provision assessment of the capability to handle intermodal loading units (containers, swap bodies or semi-trailers) in inland waterway and maritime ports. Accordingly, compliance should be assessed with a degree of flexibility and interpreted as an objective to be pursued in line with operational, technical and market conditions.

Furthermore, it is important to clarify that, in the case of ports, the Work Plan assesses whether the three possible handling capabilities are available at the level of the port, taking into account all MFTs within that port as a single entity. Consequently, all maritime freight terminals belonging to the same port are assessed collectively rather than individually.

It is also important to emphasise that the development of terminal handling capacities is closely linked to the upgrading of the connecting infrastructure. Such capacities should therefore be developed progressively, in line with the implementation of infrastructure improvements enabling compliance with TEN-T requirements, including the required loading gauge and the operation of 740-metre-long freight trains.

Finally, with regard to compliance with the requirements on 740-metre train length and electrification of the last mile, the assessment covers the infrastructure up to the terminal or marshalling yard boundary/fence ⁽¹⁴⁾ and does not extend to the infrastructure located within the terminal or yard itself. In addition, compliance with the 740-metre train length requirement should be assessed on the basis that trains can be accommodated without operational manipulation or splitting. For this purpose, the train length may be considered excluding the locomotive. If this is not economically viable, adequate measures are taken to improve the operational efficiency of accommodating 740 m long trains by 31 December 2040. In practice, the obligation is that the maritime port, inland port as a whole should ensure appropriate handling of 740 m trains, taking that flexibility into account.

Therefore, maritime ports were considered compliant if at least one terminal in the port had sufficiently long rail tracks (inside the terminal) for the cargo handling operations. Given that 740 m trains on the network include the locomotive with a length of approximately 20 m, ports with rail loading facilities of 720 m or more were considered to satisfy the TEN-T requirements.

⁽¹³⁾ The section of the Douro waterway located in the Portuguese-Spanish border is not navigable due to insurmountable physical restrictions (hydroelectric dams).

⁽¹⁴⁾ Technical errors or omissions cannot be excluded.

Inland ports

Compliance with TEN-T requirements for inland ports along the Atlantic Corridor is generally high. All inland ports are compliant with the requirements related to rail connectivity, the availability of multimodal freight terminals open to users on a non-discriminatory basis and the handling of containers.

However, by the time of this provisional assessment, the TEN-T requirement for at least one transshipment track with a usable length of 740 m is not met by the inland ports of Leixões (Douro) and Lisbon and in the French ports of Metz, Rouen and Strasbourg.

In addition, handling of semi-trailers and swap bodies is not available in Portuguese ports of Lisbon and Leixões (Douro).

Although substantial investments are underway and the situation is expected to improve considerably in the coming years there is a need for more integrated planning of intermodal operations between ports and their hinterlands, including both road and rail last-mile connections, supported by an appropriate level of services such as adequate parking facilities and reliable information provision.

Maritime ports

All maritime ports along the Atlantic Corridor comply with the requirement to provide at least one multimodal freight terminal open to users on a non-discriminatory basis.

With regard to cargo handling capabilities, container handling is available in all maritime ports. However, and considering the 2040 timeline as a best-effort target, the handling of semi-trailers is expected to be in Bordeaux by 2027. In Gijón, a project to study alternatives for an intermodal station is ongoing.

Further details on provisional technical status for inland and maritime ports are presented in Annex 2, Chapters 6.6 and 6.7.

3.1.6. Airports

With regard to heavy rail connectivity to airports several persistent bottlenecks are expected to remain by 2040. For airports requiring a TEN-T rail connection, gaps are identified at Dublin Airport, Lisbon Humberto Delgado Airport and Paris Orly Airport.

In the case of Paris Orly, a high-speed rail connection is planned via the Pont de Rungis station, but no direct rail access to the airport itself is currently foreseen.

In the case of Dublin Airport, despite that a metro connection seems to be the preferred option on the short-medium term, the medium-long term solution of a connection by heavy rail is also in the plan, as referred to in the All-Island Strategic Rail Review (AISRR). To secure the heavy rail connection and ensure compliance with TEN-T requirements in the medium to long term, an initial step should involve confirming route options through a dedicated design development study. The objective would be to reach a decision and protect the alignment before 2030, thereby safeguarding this medium-long-term project for a rail corridor from Clongriffin to the Airport, through the FourNorth project. This approach would help prevent land cost escalation driven by residential development, while also enabling a more strategic and coordinated housing programme in the surrounding areas—creating a clear win-win outcome.

In Lisbon, the future airport in Alcochete will replace Lisbon Humberto Delgado Airport in the TEN-T, this future new airport, with completion foreseen before 2040, should provide a high-speed rail connection ⁽¹⁵⁾.

3.1.7. Urban nodes

While all ATL urban nodes are compliant with the SUMP requirement, a variety of SUMP generations and geographical scopes are present. Some urban nodes (e.g. Saarbrücken) are currently adapting their mobility plan towards a SUMP. Several ATL urban nodes are planning the revision of their SUMP in line with Annex V.

3.2. Corridor implementation challenges by 2030/2040

The maturity and progress of Atlantic projects along the Corridor highlights some inconsistency and risks of delays. Even where works have commenced, project portfolios remain complex and are frequently exposed to **implementation risks**.

While several of these projects are not at risk of cancellation, their **timely completion** remains uncertain. In this context, stronger political engagement at European level may be required to ensure cross-border synchronisation, safeguard continuity along the Corridor and secure the necessary **funding commitments**. Without adequate acceleration or coordination, **delays risk creating new bottlenecks** that would undermine both the TEN-T objectives and the effective functioning of the Atlantic European Transport Corridor.

⁽¹⁵⁾ At present, no specific projects are included in the Atlantic European Transport Corridor Project List to ensure connectivity to the new airport. According to national plans, high-speed rail access is expected to be provided via the new Lisbon–Évora line.

The following projects are considered to be **at risk of delay**, of **missing the relevant TEN-T milestone** or of **facing difficulties in securing or losing financing**. These projects therefore warrant particular attention and close monitoring.

3.2.1. Core network Rail projects

3.2.1.1. High-speed Lines

The **Lisbon-Madrid** high-speed line is object of an Implementing Decision, in which Member States have committed with demanding schedules and intermediate deadlines towards the completion of the line up to 2034, which do not cope with further delays:

- The studies for the Lisbon-Évora new high-speed line section, including a new Tagus River crossing in Lisbon are ongoing. The preliminary design and EIA studies are due by August 2026.
- The construction works on the second track in the conventional line section from Poceirão to Bombel should start at latest by the first semester of 2026.
- The studies for the high-speed section between Caia and Badajoz was commissioned by AVEP EEIG ⁽¹⁶⁾ in the first semester of 2026.
- ERTMS deployment between Badajoz and Plasencia is expected to be concluded by 2026.
- The gradual construction and entry into service of the Talayuela-Madrid high-speed line section, integrated with the progressive electrification of the Talayuela-Humanes conventional line section as a necessary enabling measure, shall ensure that the Madrid-border travel time – without intermediate stops – may be below three hours by the end of 2030.

The **Lisbon-Porto** high-speed line represents a major infrastructure project in Portugal and is structured into three public-private partnership contracts to be delivered in successive phases up to 2032: PPP 1 (Porto-Oiã), scheduled for completion by 2030, PPP2 (Oiã-Soure), foreseen by 2032, and PPP3 (Soure-Carregado), planned for 2032.

⁽¹⁶⁾ AVEP refers to the Alta Velocidad(e) España - Portugal, a structured bilateral cooperation platform between Portugal and Spain bringing together national authorities, infrastructure managers and stakeholders. It supports coordination on strategic cross-border transport and infrastructure projects, with a particular focus on rail connectivity, interoperability, planning alignment and implementation sequencing along shared corridors.

- PPP1 was awarded in October 2024, and the contract was signed in July 2025. The start of construction should start according to the scheduled plan. PPP2 was relaunched following the cancellation of an initial tender procedure, leading to a delay of approximately one year in the procurement process.
- The timely implementation of PPP1 and PPP2 will be critical for maintaining the overall delivery schedule of the project. Any further delays may affect the launch and execution of PPP3, which is currently envisaged for 2026 but may be subject to revision. In addition, these developments have broader implications for other major projects in Portugal that are planned under a PPP model.

The LNSO, *Ligne Nouvelle du Sud-Ouest*, is structured in two phases. Phase 1, covering the sections Bordeaux-Toulouse (with new lines and operations at the South of Bordeaux and at the North of Toulouse) and Bordeaux-Dax. Phase 2, extending from Dax to the Spanish border, is foreseen beyond 2040. This project's completion timeframe will be specified in the forthcoming multi-annual programme law on investment in transport infrastructure in France.

- **Phase 1 Bordeaux-Dax/Toulouse**

- In 2022, a financing project company *Société du Grand Projet du Sud-Ouest (SGPSO)* was created for managing financial contributions from local authorities. A financing plan was agreed for Phase 1, based on a distribution of 40% funding from the French State, 40% from local authorities and 20% from the European Union. The operations at the South of Bordeaux (AFSB) with the creation of an additional railway line over 12 km - and at the North of Toulouse (AFNT) with the creation of two additional railway lines over 17 km, are underway and will be delivered before 2032. They include capacity enhancement near the nodes of Bordeaux and Toulouse for future high-speed traffic between Spain and Bordeaux/Toulouse. Phase 1 can be divided in three new lines sections: a common section Bordeaux-Sud-Gironde and the section Sud-Gironde-Toulouse and the section Sud-Gironde Dax.
- Following the national transport financing conference held in July 2025, the French Government announced its intention to prepare a new framework law on transport, including an upgraded programme plan for major infrastructure investments. The advisory entity from the *Conseil d'Orientation des Infrastructures (COI)* has been tasked by the Ministry of transport to consider a new prioritisation of infrastructure projects. The project's completion timeframe will be specified in the forthcoming multi-annual programme law on investment in transport infrastructure in France, following the COI report.

- On 7 May, the French government and regional representatives from Nouvelle Aquitaine and Occitanie signed a protocol, reaffirming the irreversibility of the phase 1 (Bordeaux – Toulouse – Dax) of the LNSO project, and confirming the launch of operations from 2026 onwards. The "*conception-réalisation*" financing model should be further defined in the coming months.

- **Phase 2 Dax-Spanish border**

- For Phase 2, the legal process for the *Déclaration d'Utilité Publique* (DUP) has not started yet. The DUP constitutes a prerequisite for land acquisition and the progression of the project to implementation.

In 2026, SNCF Réseau launched a call for tenders to Update the Preliminary Design Studies for the New Dax–Spanish Border Line by mid-2027, and to update the Final Preliminary Design for the integration of the New Dax–Spanish Border Line into the existing railway network by the end of 2028.

3.2.1.2. Conventional network

Projects on freight lines serving maritime and inland ports present a risk of delay for 2030, notably:

- modernisation of rail access to the port of Strasbourg, including electrification, and ERTMS deployment;
- road and rail access to the future Vasco da Gama Terminal in Sines. While the rail infrastructure and access solutions have already been studied and are included in the planning of the Port of Sines Administration, the overall implementation timeline remains dependent on the launch and development of the terminal concession procedure.

Several potential measures of capacity expansion on the conventional rail network would help ensuring the efficient operation of freight traffic along the Atlantic European Transport Corridor, particularly in terms of capacity, interoperability and flexibility. According to national planning and financing procedures, these projects are not yet planned or further planning cannot proceed.

The projects identified are:

- capacity expansion in the Ludwigshafen node, including Ludwigshafen-Mundenheim and Ludwigshafen main station, in Germany, aligned with projected rail freight growth;
- deployment of permanent counterflow installations on several sections in France, including Meaux–Château-Thierry, Val d'Argenteuil–

Conflans-Sainte-Honorine, Motteville–Le Havre, Dormans–Épernay and Gazinet/Lamothe–Lamothe–Morcenx.

3.2.2. Airport connectivity

Projects intended to strengthen airport connectivity also pose a significant challenge. These include:

- the TGV rail station at Pont de Rungis serving Paris Orly Airport;
- second phase of the high-speed rail access to Madrid Barajas Airport, aimed at improving intermodality between the high-speed rail network and the airport;
- the rail connection between Santa Justa station and Seville Airport ⁽¹⁷⁾.

3.2.3. Maritime connectivity

Maritime connectivity, combining both maritime attractiveness and hinterland accessibility and connectivity is critical for the Atlantic Corridor. While port - specific infrastructure requirements and related investments plans are addressed and monitored under the European Maritime Space, it is important for the Atlantic Corridor to follow their progress. Several investments for upgrading capacity along rail freight corridor alignment are justified by the expected increase in flows from ports as main feeders of the Corridor. Port and hinterland development, including capacity, therefore need to be considered together, as additional maritime and terminal capacity can generate corresponding capacity needs on the Corridor, while insufficient hinterland capacity can constrain the effective use of port investments.

Moreover, the maritime links to the Canary Islands and to Ireland, part of the Corridor alignment, deserve a special attention as they ensure connectivity with mainland Europe.

The overall volumes using the Atlantic Corridor represent around 14% of Ireland's trade with the EU Single market. The most relevant core ports on the Atlantic Corridor for Irish trade are Le Havre and Bilbao, as well as Santander and Leixões. However, most of Ireland's trade on the maritime connections of the Atlantic Corridor uses the Port of Cherbourg, which is a comprehensive port.

⁽¹⁷⁾ Under Regulation (EU) 2024/1679, airports of the core network handling more than 12 million passengers per year are required to be connected to the rail network, preferably by high-speed rail where feasible. Seville Airport is below this threshold. Therefore, such a connection is not a mandatory requirement but contributes to improved multimodality.

The Atlantic Corridor represents an important cross-border route for industry sectors importing and exporting perishable goods, such as agrifood and seafood, between markets in Ireland, France, Spain, Portugal and neighbouring countries.

The RoPax routes on the Atlantic Corridor are also a primary route for tourist passengers with vehicles. This passenger traffic also represents an integral part of the commercial model that supports these freight services.

Other RoPax and container services, such as those connecting the Canary Islands with the peninsula through Huelva and Seville as gateways to the Corridor, and including other comprehensive ports such as Cádiz, also highlight the vital importance of improving transport links and reducing costs for connecting the outermost regions to the mainland.

The maritime routes of the Atlantic Corridor, including those connecting Ireland and the outermost regions with mainland Europe also contribute to the resilience of the overall maritime transport system by providing alternative routes and connections. Furthermore, some projects to reactivate connections between some ports of the Corridor are emerging such as between Gijón and Nantes.

Therefore, the current and future capacity requirements in these maritime routes will need to be monitored closely for any persistent bottlenecks.

3.2.4. Extended Core network Rail projects and 2040 KPI

3.2.4.1. High-speed lines

The **Porto-Vigo** high-speed line, being part of the extended core network, is legally due by 2040. However, both Portugal and Spain have expressed political willingness to advance its delivery. In this context, preliminary studies have been initiated by both ADIF and *Infraestruturas de Portugal* under the framework of AVEP, with a view to strengthening cross-border coordination and exploring possibilities for accelerating implementation.

On the Portuguese side, the first phase of the project includes the section connecting Porto to Sá Carneiro Airport and the section between Braga and the Spanish border. Its delivery is currently foreseen for completion by 2033. The second phase, linking Porto Airport to Braga, is currently scheduled for completion after 2034. The preliminary design and EIA studies for both phases are due to completion in the first semester of 2026.

On the Spanish side, project for the southern exit of Vigo is planned for completion by 2032. The alignment of implementation schedules on both sides of the border will therefore be essential to ensure coherent cross-border functionality and to avoid temporary operational imbalances.

The **Aveiro-Viseu-Vilar Formoso** high-speed connection is composed of two parts, Aveiro-Viseu and Viseu-Vilar Formoso which are due by 2040. Given the scale and ambition of the ongoing high-speed programme in Portugal, advancing this project within the current planning framework appears challenging. In addition, the socio-economic case for the project, which in the past has limited progress on this alignment, would need to be further substantiated in order to support any decision to anticipate its implementation.

The **Ligne Nouvelle Paris Normandie (LNPN)** aims to provide the Seine Valley with a modernised and efficient railway "backbone". It is composed of several parts with as prerequisite for this project, the construction of flyover upgrading the Saint-Lazare station approach area. The first part of the LNPN is the new high-speed line Paris Saint Lazare – Mantes la Jolie, part of the core network. The second part is another high-speed section between Rouen and Yvetot and which is part of the extended core network. However, this project is not yet fully defined since the *Déclaration d'utilité publique* has not been taken. and given the necessity to finalise the ongoing works of numerous other projects in France.

3.2.4.2. Conventional lines

In this context, the planned signalling and electrification works on the Linha do Leste in Portugal, expected by 2034, are of particular importance. As the line already complies with the TEN-T loading gauge requirements, these upgrades will further strengthen interoperable east–west freight connectivity between Portugal and Spain and support the development of rolling motorway and combined transport services along the Corridor.

In parallel, a key Portuguese investment on the extended core network concerns the construction of a new line between Sines and Grândola Norte on the South Line. The project will strengthen freight connectivity from the Port of Sines to the main north–south corridor and is designed to accommodate trains of up to 750 metres, including the adaptation of Grândola Norte station. The line will be electrified and operated at 100 km/h, in line with freight requirements, with completion scheduled by 2040.

3.2.5. Governance

Effective governance is a fundamental condition for the successful implementation of cross-border projects along the Atlantic European Transport Corridor. Beyond technical design and financing, the timely delivery of major infrastructure depends on aligned planning assumptions, synchronised implementation schedules and structured mechanisms for political and technical coordination between neighbouring Member States.

Experience along the Corridor confirms that even well-prepared national projects may generate operational inefficiencies if cross-border governance arrangements are not sufficiently robust. Differences in timing, technical parameters or investment prioritisation can create temporary or structural imbalances at border interfaces, ultimately affecting interoperability, capacity utilisation and the overall performance of the Corridor.

In this context, the cooperation framework established under AVEP has provided a positive example of structured bilateral coordination between Portugal and Spain. The decisions taken within the AVEP Assembly, together with the ongoing technical dialogue between the respective ministries and infrastructure managers, have reinforced alignment on strategic projects such as Lisbon–Madrid and Porto–Vigo. AVEP has demonstrated the value of maintaining continuous dialogue, early exchange of planning information and joint monitoring of cross-border sections.

At the same time, coordination between Spain and France on rail cross-border projects and mobility is essential. Several structures exist at different levels—such as the Euroregion or the EEIG Atlantic—as well as within the rail freight governance of the Corridor. Additionally, ad hoc working groups are established by the Coordinator to support this collaboration.

The adoption of Implementing Decisions for key cross-border projects has also strengthened governance arrangements by formalising common milestones, reporting obligations and coordination mechanisms. The Implementing Decision for the Lisbon–Madrid connection provides a useful precedent in this respect. Upcoming Implementing Decisions along the Corridor offer an opportunity to further reinforce governance provisions, including clearer monitoring structures, shared timelines and joint risk mitigation mechanisms.

The following examples illustrate, despite numerous efforts from former EU Coordinator to reactivate dialogue platforms, how differences in timing, technical scope or investment sequencing can affect Corridor performance if not adequately addressed through coordinated action and structured cooperation.

Y Basque / Ligne Nouvelle du Sud-Ouest

The development of the Y Basque high-speed network on the Spanish side is advancing, while the corresponding cross-border and downstream sections on the French side, notably towards Bordeaux, remain subject to longer implementation timeframes. Pending the development of the future high-speed line, the existing network may face capacity constraints, including requirement for capacity enhancement at Hendaye station. There is a risk of creating a functional imbalance at the cross-border interface. Such a mismatch could delay the realisation of the full benefits of the Y Basque investment for both passenger and freight traffic and limit cross-border interoperability in the medium term.

Beira Alta / Salamanca axis

The Beira Alta line was object of a full renewal with works, including on meeting 740 m requirements, concluded mid 2025 after several delays. The line electrification works from the border towards Salamanca are currently foreseen to be completed by the end of 2026. While this represents an important step forward, no interventions are currently planned to address train length requirements on this section. The non-adequacy to longer trains implies that rail freight operators still require to adapt their rolling stock hindering the capacity to benefit from the works in Beira Alta line.

Sines-Évora-border and Puertollano axis

From 2027 onwards, freight operations from the ports of Lisboa/Setúbal and Sines are expected to commence on the new Évora-border line, creating a new cross-border rail freight outlet between Portugal and Spain. However, the corresponding freight alignment via Puertollano on the Spanish side is not expected to be electrified before 2032. This temporal gap risks limiting the efficiency and environmental performance of cross-border freight flows during the interim period.

These issues have been identified as priorities for continued bilateral coordination between IP and ADIF through AVEP, with a view to mitigating transitional bottlenecks and ensuring operational continuity across the border for both freight and passenger operations.

4. Coordinator's outlook: recommendations and priorities

The completion of the Atlantic European Transport Corridor depends on addressing a number of remaining infrastructure gaps and technical barriers affecting both passenger and freight transport. Key challenges concern missing links in the high-speed rail network, cross-border coordination, and freight interoperability requirements such as 740 m train operations, electrification, loading gauge (rail transport of semi-trailers) and track gauge compatibility.

This chapter identifies the priority axes of the Corridor and presents a milestone plan for eliminating the main barriers by 2030 and 2040, with particular attention to key cross-border projects, as well as the concluding recommendations from the Coordinator.

4.1. Corridor priorities

The priority axes of the Atlantic European Transport Corridor are identified based on the remaining gaps affecting both freight and passenger rail performance, in particular missing cross-border links, incomplete compliance with TEN-T technical parameters and the delivery of key high-speed rail sections, and ensuring resilient maritime connectivity on both the northern and southern maritime axes of the Corridor.

For freight, the analysis focuses on the main axes where 740 m train operations, electrification, loading gauge conditions or track gauge interoperability that are not yet fully ensured. For passenger transport, priorities relate to the completion of missing high-speed rail links and track gauge interoperability along the main passenger corridors.

The main priority axes, which, in 2026, should realistically be prioritised to reach the targets of the Atlantic Corridor are summarised below.

Freight priorities	Passenger priorities
Main traffic flows freight axes where improvements are required to ensure 740 m train operations, electrification, loading gauge (rail transport of semi-trailers) and track gauge interoperability where necessary. Particular attention is given to missing links that will progressively close these gaps, although several are nearing operational readiness (e.g. Évora–Caia (2027), third rail Astigarraga–Irún (2029)).	Main passenger axes where the completion of high-speed rail sections and remaining missing links is required to ensure continuous HSR services and improve cross-border connectivity. Track gauge, signalling system and electrification interoperability also remains a relevant issue especially for HSR. High-speed rail access to the airport of major nodes, with more than 12 million passengers per year is crucial to support faster, more reliable end-to-end journeys, reinforcing the role of airports as multimodal hubs, and contributing to decarbonisation objectives.
1. Sines/Lisbon – Badajoz – Puertollano – Madrid – border	1. Paris – Bordeaux / Toulouse – Dax - Madrid
2. Leixões – Beira Alta line – Salamanca – Valladolid / Leon	2. Madrid - Lisbon
3. Valladolid / Bilbao / Zaragoza – Vitoria – Tours - Paris / Mannheim	3. Porto - Lisbon
4. Algeciras / Huelva – Madrid	4. A Coruña – Vigo – Porto
5. A Coruña- Vigo– Ourense – Valladolid – Madrid / Vitoria	5. Santiago de Compostela - Madrid
6. Porto – Lisbon	6. Gijón - Madrid
7. Gijón / Santander - Madrid	7. Aveiro – Viseu
	8. Ligne Nouvelle Paris Normandie

On the rail freight network, and the 740-metre train lengths operation:

When comparing Figures 6-7, 6-10 and 6-13 with Figure 6-1, priority should be given to investments in port terminals and MFTs that are either already connected to a network infrastructure capable of accommodating 740-metre train lengths or are soon to be connected. This is particularly relevant for: the ports of Sines, Lisboa-Setúbal, as well as Leixões in Portugal; Bilbao port and the Alcázar de San Juan MFT in Spain. Additionally, considering the entire French network already supports 740-metre train lengths, priority should be given to ensuring the ports of Bordeaux, Nantes Saint-Nazaire, Brest, and Rouen, along with the inland port of Metz and Strasbourg, comply with this requirement to encourage a modal shift to rail transport. In this regard, we welcome the ongoing works at the MFTs of Bayonne-Mouguerre, to accommodate 740-metre trains.

As horizontal priorities for all those sections, particular attention is given to:

Accelerating rail modernisation and capacity upgrades, as ensuring a high level of maintenance

Rail is the core mode of the Atlantic Corridor and a key enabler of decarbonisation and congestion reduction. However, several sections still face capacity constraints, single-track operations, outdated signalling and electrification, notably in all the countries of the Corridor. Key priorities include regeneration of the network and centralised traffic control (CTC), but also continuously ensuring adequate maintenance intended to provide, for the existing infrastructure, a level of service suited to the traffic flow, and high level of safety during the lifetime of the infrastructure.

Strengthening operational, administrative and digital coordination

Operational inefficiencies remain a challenge, particularly within the rail sector, where divergent practices, limited digital interoperability and insufficient cross-border coordination continue to hinder progress. Priorities for rail include fostering closer collaboration between infrastructure managers and railway undertakings, expanding the use of interoperable digital solutions (such as TAF/TAP-TSI), enhancing cross-border path planning, and introducing standardised multilingual communication.

Furthermore, smooth operation can be improved by enhancing interoperability, digitalisation and network integration.

A low degree of standardisation of operational and safety rules makes rail transport less seamless, costlier and slower thus putting seriously at stake what new or upgraded rail infrastructure is supposed to deliver in terms of envisaged performance, dwell time at borders, capacity and speed.

The notification and cleaning-up of national rules and the conclusion of cross-border agreements or arrangements between national safety authorities, through the envisaged processes at EU level, remain critical to ensure that national constraints or solutions on the rail infrastructure do not negatively impact rolling stock authorisation, certification processes of railway undertakings, and do not hinder seamless rail operations.

In the case of new or upgraded infrastructure, especially for cross-border projects, Member States should achieve:

- greater harmonisation of technical solutions, including by aligning the technical specifications and timeline of investments with the neighbouring Member State;
- timely progress ETCS-only, with interoperable solutions across borders;

- phase out national rules on rail safety, signalling and operations.

Enhancing climate resilience

The Corridor is increasingly exposed to extreme weather events, requiring a more integrated resilience strategy. Key priorities include coordinated contingency planning, enhanced data sharing and exchange of best practices, and more harmonised risk assessment criteria across Member States.

4.2. Milestone Plan to eliminate barriers until 2040

Core Passenger network - International dimensions

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Madrid-Lisbon High-Speed Line	Rail	Project involves the implementation of the actions:						This project targets the construction of new sections in Portugal and Spain with the overall aim to ensure an adequate travel time for direct high-speed services of about three hours between Lisboa and Madrid by 2034. It includes intermediate steps to ensure by 2030 direct services with a travel time of about five hours.
		Construction works on the second track in the conventional line section from Poceirão to Bombel	tbd	Speed >200 Km/h	PT-ES	End 2029	EUR 9.28 bn (PT – 7.4 bn; ES – 1.88 bn)	
		Entering into service of the new high-speed line between Évora and Caia	1 668			Q1 2027		
		Plasencia - Talayuela high-speed line section	1 668			End 2028		
		Gradual construction and putting into service of the Talayuela – Madrid high-speed line section, integrated with the progressive electrification of the Talayuela - Humanes conventional line section as a necessary enabling measure	1 668 / 1 435			End 2030 (Madrid-PT border travel time below three hours)		
		Studies for the Lisbon-Évora new high-speed line section, including a new Tagus River crossing in Lisbon	tbd			End 2027		
		Lisbon-Évora new high-speed line section, including the third bridge over Tagus River in Lisbon	tbd			Enter into service by 2034		
		Construction of the double track on the Évora - Caia high-speed line section (depending on confirmation of its justification)	tbd			to be decided		

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
		ERTMS deployment in the sections • Évora and Elvas • Badajoz-Plasencia • Plasencia-Talayuela • Elvas-Badajoz	tbd	ERTMS		End 2027 End 2026 End 2028 End 2028		
		Studies (by AVEP) towards a decision to build the high-speed section between Caia and Badajoz and, if applicable, its construction timetable and the opportunity to build an international railway station	tbd	-		End 2027 (if positive, enter into service by 2034)		
Madrid-Burgos-Vitoria-Dax-Bordeaux-Paris (Y Basque LNSO)	Rail	Project involves the implementation of the actions:						This project will ensure a continuous service Madrid to Paris, enabling a journey time of six hours. from Madrid to Paris. It includes the completion of the ongoing works in the Y Basque and the start of construction of the LNSO from the border in Irún/Hendaye towards Dax and Bordeaux.
		Construction of the HSL Burgos-Vitoria	1 435	Speed >200 Km/h	ES-FR	2032	EUR 19.25 bn (ES – EUR 8.7 bn; FR – at least EUR 12 bn)	
		Track duplication of the section Venta de Baños-Burgos in the HSL Valladolid-Burgos-Vitoria	1 435			2032		
		Construction of the HSL Vitoria-Bilbao/San Sebastián and Astigarraga-Irún, including third rail installation between Astigarraga and Irún	1 435			Indicative date around 2030/2032		
		Construction of the HSL and upgrade of the conventional line (freight and passenger traffic) between Astigarraga and Lezo	1 435			2032		
		Construction of the HSL Lezo - French border	1 435			By the time FR reaches the border		
		Construction of the HSL Spanish border – Dax	1 435			Beyond 2040		

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
		Construction of the HSL Dax-Sud-Gironde	1 435			Indicative date around 2040 ⁽¹⁸⁾		
		Construction of the HSL Sud-Gironde-South Bordeaux	1 435			Indicative date around 2035 ⁽¹⁹⁾		

Note: tbd - to be defined

Core Passenger network - National dimensions

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Lisboa-Porto High-speed Line	Rail	Project involves the implementation of the actions:						
		Construction of Phase 1 of the HSL between Porto and Oia (PPP1)	tbd	Speed >200 km/h	PT	2030	EUR 9.6 bn	
		Construction of Phase 1 of the HSL between Oia and Soure (PPP2)	tbd	Speed >200 km/h		2032		
		Construction of Phase 2 of the HSL between Soure and Carregado (PPP3)	tbd	Speed >200 km/h		2032		
		Construction of Phase 3 of the HSL between Carregado and Lisboa	1 435	Speed >200 km/h		> 2034		
		Migration of HSL between Porto and Carregado	1 435	Track gauge		> 2034		

⁽¹⁸⁾ To be specified in the forthcoming multi-annual programme law on investment in transport infrastructure in France.

⁽¹⁹⁾ To be specified in the forthcoming multi-annual programme law on investment in transport infrastructure in France.

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
HSL Gijón-Madrid	Rail	Construction of the Villabona bypass in the HSL Oviedo-Gijón	tbd	Speed >200 km/h	ES	2034	EUR 253 M	The construction of the route variation in the line Venta de Baños-Gijón Sanz Crespo, from Lugo de Llanera to the Serín area, allows for improved travel times between Oviedo and Gijón (long-distance and commuter trains), increased capacity, and greater flexibility in rail operations and for direct services between Gijón and Avilés that do not require reversing at Villabona station.
HSL Zaragoza-Vitoria	Rail	Project involves the implementation of the actions:						The construction of this line improves the connection between the Mediterranean and Atlantic corridors, increasing the passenger connectivity to the Y Basque and further to France.
		Construction of the HSL Castejon - Pamplona	1 435	Speed >200 km/h	ES	Indicative date around 2030/2032	EUR 892M	
		Construction of the HSL Zaragoza - Castejon and Pamplona - Vitoria	1 435	Speed >200 km/h	ES	Indicative date around 2035	EUR 3.1 to 4.2 bn ⁽²⁰⁾	
Algeciras-Bobadilla electrification	Rail	Electrification of the section Algeciras-Bobadilla	1 668	Electrification Speed >160 km/h	ES	2030	Included under freight network	Electrification of this section will enable the continuation of high-speed passenger services in the conventional network from Antequera to Algeciras (HSL Madrid-Antequera-Málaga)
HSL Sud Gironde - Toulouse	Rail	Construction of the LNSO between South Gironde to Toulouse	1 435	Speed >200 km/h	FR	Indicative date around 2035	EUR 7.5 bn	This project enables a direct high-speed service between Toulouse and Bordeaux (targeted time of 1h05) and further to Paris (3h10).

⁽²⁰⁾ Investment cost will be defined based on the outcome of the study identifying the most suitable connection with the HSL Vitoria-Bilbao/San Sebastián

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Upgrade of the Nevers-Montchanin section	Rail	Electrification of the Nevers – Montchanin section in the alignment Tours-Dijon.	1 435	Electrification Speed >160 km/h	FR	N/A	N/A	This project enables to address a bottleneck in the passenger services to Dijon and its further connection to the Paris–South-East high-speed line. Currently no projected action.

Note: tbd - to be defined

Core Freight network – International dimensions

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Sines-Madrid	Rail	This project involves the implementation of the actions:						This project targets to assure a continuous and interoperable freight service from Sines to Madrid, benefiting from the completion of upgrade works in the Sines line and missing link in the border Évora-Elvas
		Increase capacity in the conventional Line - Linha do Alentejo - Section Poceirão-Bombel	1 668	-	PT-ES	2029	EUR 270.6 M	
		Upgrade of Mérida-Manzanares section	1 668	Electrification 740 m		2032	EUR 509 M	
		Interoperable sidetracks to allow train length between Manzanares and Alcazar de San Juan	1 668	740 m		2030	Costs are included in the project the Algeciras-Madrid	
		Interoperable sidetracks to allow train length between Alcazar de San Juan and Madrid	1 668	740 m		2030	Costs are included in the project the Algeciras-Madrid	

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Leixões - Vitoria	Rail	This project involves the implementation of the actions:						This project targets to assure a continuous and interoperable freight service from Leixões to Valladolid and León and further continuing to Vitoria and France
		Upgrade of Leixões line to allow freight trains of 740 m	1 668	740m	PT/ ES	End 2028	EUR 57 M	
		Quadrupling of section Contumil – Ermesinde	1 668	740m		2030	EUR 227.7 M	
Vitoria-Bilbao – France	Rail	Upgrade of line between Fuentes d'Oñoro - Salamanca – Medina del Campo-Valladolid	1 668	740 m		2030	Under study	This project reinforces the key freight gateway between the Iberian Peninsula and the rest of Europe, improving capacity and interoperability and enabling continuous freight flows from Spain towards France and Germany through the Y Basque corridor.
		Project involves the implementation of the actions:						
		Conventional rail line Burgos-Vitoria: Renewal + tunnels	1 668	Loading gauge 740 m	ES/ FR	2030	EUR 182 M	
		Upgrade of Miranda de Ebro - Bilbao conventional line for 740 m trains	1 668	740 m		2030	EUR 9 M	
		Construction of the Y Basque: LAV Vitoria-Bilbao/San Sebastián y Astigarraga-Irún, including third rail installation between Astigarraga and Irún	1 435 / 1 668	740 m Gauge Freight Speed Loading gauge		2032	Covered above	
		IPCS (permanent counterflow installations) between Hendaye and Bordeaux for TCR planning and traffic disturbances (except Morcenx Dax already completed)	1 435	Capacity		unknown	unknown	

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
		Clearing the outlet and gauge of the tunnels between Hendaye and Ile de France	1 435	Loading gauge		unknown	Unknown (earlier estimated costs of EUR 450M)	

Core Freight network – National dimensions

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Algeciras/Huelva - Sevilla-Madrid	Rail	Project involves the implementation of the actions:						This project supports the deployment of rolling motorway services from the ports of Algeciras and Huelva towards Zaragoza, improving freight interoperability and contributing to modal shift along the Atlantic Corridor.
		Electrification, adaptation to TEN-T loading gauge and improvements in the line for 740 m freight trains for the section Algeciras-Bobadilla	1 668	Loading gauge Electric ation 740 m	ES	2030	EUR 247 M	
		Upgrade of line Huelva-Sevilla to 740m freight trains	1 668	740 m	ES	2030	EUR 15.2 M	
		Adaptation of full alignment Bobadilla-Zaragoza to TEN-T loading gauge ⁽²¹⁾	1 668	Loading gauge	ES	2028	EUR 234 M	
Zaragoza-Vitoria	Rail	Upgrade of line for 740m freight trains and adaptation to TEN-T loading gauge	1 668	Loading gauge 740 m	ES	2027	EUR 825 M	This project is necessary to assure that rolling motorway has continuity beyond Spain. By establishing the connection to Vitoria terminal and further Y Basque the continuity over the corridor is maximised.

⁽²¹⁾ This investment includes the section Madrid-Zaragoza, which is not part of the Atlantic ETC but rather in the Mediterranean ETC.

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Santander-Palencia (extended core network)	Rail	Renewal and improvement of the conventional line between Palencia and Santander	1 668	740 m	ES	2034	EUR 217.8 M	Improvement of conventional line in accordance with TEN-T requirements (train length, speed)
A Coruña – Redondela / Gijón – León / Santander – Venta de Bãnos	Rail	Project involves the implementation of the actions:						This project targets to assure a continuous and interoperable freight service from A Coruña to Valladolid and León.
		Upgrade of line between Redondela-A Coruña to allow freight trains of 740 m	1 668	740 m	ES	N/A	N/A	
		Monforte de Lemos – León	1 668	740 m	ES	2034	EUR 300 M	
		Upgrade of the conventional line between Palencia - León	1 668	740 m		2034	EUR 258 M	
Lisbon-Porto (North Line)	Rail	Project involves the implementation of the actions:						This project improves capacity and interoperability on the northern access to Lisbon, enabling 740 m freight operations to the port of Lisbon and supporting mixed passenger–freight traffic along the Atlantic Corridor.
		Lisboa area upgrade to 740m, including construction of Alcântara rail grade separation	1 668	740m speed	PT	N/A	EUR 664.6 M	
		Prolonging quadruple stretch between Roma-Areeiro (Linha de Cintura) and Braço de Prata (Linha do Norte)	1 668	740m speed	PT	2034		
		Increase capacity in the exit of Lisbon on the conventional north line (stretch Alverca - Castanheira do Ribatejo - Azambuja)	1 668	740m speed	PT	2032		
		Adaptation of remaining sections to 740 m freight trains	1 668	740 m	PT	N/A	N/A	

Core network - Passenger connection to airports

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Porto Airport	Rail	Project involves the implementation of the action (part of the Porto-Vigo HSL):						The project will ensure connectivity between Porto Sá Carneiro airport (by high-speed rail) with the city of Porto, but also to the Minho Line towards Braga and later on towards Galiza. This is of particular relevance given that the airport also serves the Spanish region of Galiza, given their proximity.
		1 st Phase: Porto Campanhã – Porto Airport	1 668	High-speed rail connection to airport	PT	2033	EUR 1.6 bn	
Madrid Barajas Airport	Rail	Project involves the implementation of the actions:						Direct connection to the airport with Madrid in standard European gauge and ensuring connection with the high-speed network.
		Rail access to the airport (1 st phase)	1 435	High-speed rail connection to airport	ES	2023/2030	EUR 272.8 M	
		Intermodality HS network and Airport: Double track section to Chamartín station (Hortaleza tunnel) and expansion of T4 station	1 435	High-speed rail connection to airport	ES	2026/2034	EUR 1 170 M	
CDG Express	Rail	The Charles de Gaulle Express (CDG Express) project involves the creation of a direct, high-speed rail link between Charles de Gaulle Airport and Gare de l'Est.	1 435	High-speed rail connection to airport	FR	2027	EUR 344 M	This project improves rail access to and from Paris-CDG.

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Paris Orly Airport	Rail	The TGV station at Orly - Pont de Rungis is identified as a strategic infrastructure of the South Paris bypass	1 435	Rail Connection to airport	FR	N/A	EUR 445 M	The project will allow: (1) Air/Rail intermodality with Orly Airport (1 station via metro line 14), (2) Access to high-speed trains for the Val-de-Marne and the eastern part of the Essonne areas and (3) Possibility of developing origin/terminus services against the backdrop of congested Paris stations and market opening to competition. Unfortunately, it will not allow for end-to-end journeys without changing
Dublin Airport	Rail	Establishment of a rail connection to the Dublin airport. Given the high volume of passengers for this airport a rail connection is required.	N/A	Rail connection to airport	IE	N/A	N/A	Given the high passenger volumes handled by the airport and its role as Ireland's main gateway to continental Europe, there is an urgent need to develop a sustainable connection from Dublin airport to the city centre, as to connect it with the heavy rail network, especially considering the ambitious railway plan of Ireland to reach high-speed rail connection from Dublin to Cork, Limerick and Belfast. As the two projects are complementary, the government has opted to advance both: the Metrolink in the short-to-medium term and the heavy rail connection in the medium-to-long term. To secure the heavy rail connection and ensure compliance with TEN-T requirements in the medium to long term, an initial step should involve confirming route options through a dedicated design development study. The objective would be to reach a

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
								decision and protect the alignment before 2030, thereby safeguarding this medium-long-term project for a rail corridor from Clongriffin to the Airport, through the FourNorth project. This approach would help prevent land cost escalation driven by residential development, while also enabling a more strategic and coordinated housing programme in the surrounding areas—creating a clear win-win outcome
New Lisbon Airport	Rail	Connection by high-speed rail to the new Lisbon airport in Alcochete	1 668	High-speed rail connection to airport	PT	2034	Included under Lisbon-Madrid HSR project	The project will enable connection between the airport and the city of Lisbon, as well as to the new high-speed network. This connection is foreseen a part of the high-speed Lisboa-Madrid project

Core network - Freight connections to ports and terminals

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Establish a rail connection to the port of Cork	Seaport	This project refers to the establishment of a rail connection to the port of Cork	-	seaport rail connection	IE	N/A	N/A	Cork and Shannon Foynes are core port requiring rail connections that currently are not available.
Reactivation of rail connection to the port of Shannon Foynes	Seaport	Reinstatement works for the Shannon Foynes Port rail link to the national rail network at Limerick city	-	seaport rail connection	IE	2026	EUR 104 M	

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Rail connection to the outer port of A Coruña	Seaport	Execution of the new rail access (including south branch -2nd phase-) to the outer port of A Coruña	1 668	seaport rail connection	ES	2026 1st phase 2027/2032 2nd phase	EUR 160 M 1st Phase EUR 30 M 2nd phase	New rail connection, prepared for 740 m
Bilbao South Rail access	Seaport	New section of conventional line for freight transport (South rail bypass)	1 435	seaport rail connection	ES	2034	EUR 1 060 M	New rail connection in standard gauge, prepared for 740 m trains.
Rail and road last mile connections and rail terminals in Algeciras Port	Seaport	Works to improve the rail connection by constructing a new technical facility (Botafuegos), a new dedicated track to the port and terminal extensions (740) within the port, and new northern road access to the port	1 668	seaport rail and road connection	ES	2030	EUR 204.1 M	Improved rail connection, implementing electrification and allowing 740 m into the port and northern road access to the port. This project is complementary to the improvements in the Bobadilla-Algeciras line.
Rail connection to the port of Seville and electrification	Seaport & Inland port	New direct connection (by-pass) to the port and electrification	1 668	seaport road connection	ES	2030	EUR 44.7M (by-pass) EUR 5 M (electrification)	Improved rail connection, eliminating a current bottleneck (completion 2026) Electrification (completion planned by 2030)
New road connection of Granadilla Port (Tenerife)	Seaport	New construction and direct connection to TF-1 road from Granadilla Port in Tenerife.	-	seaport road connection	ES	2030	EUR 40.2M	New road connection, eliminating a current bottleneck.
River access to Le Havre Port 2000	Seaport	Works of a direct connection of Port 2000 with inland waterways	-	Seaport waterway connection	FR	2027	EUR 197 M	Completion of Port 2000 terminals with the improvement of river access to Port 2000

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Land Accessibilities to the port of Leixões	Seaport	Works to improve road and rail accessibilities in the port of Leixões	1668	seaport rail and road connection	PT	2030	EUR 20 M	Investments needed to strengthen the integration and complementarity of the logistics and transport infrastructures managed by APDL
Port infrastructure of Douro's inland Waterway	Inland Port	Create new structures to support the movement of passengers and freight, create an intermodal platform to ensure complementarity between Douro's inland waterway and the railroad, as well as promote facilities for the supply of electricity, water, waste and used oils collection.	-	Inland port rail and IWW connection	PT	2029	EUR 39 M	Improve multimodal connections at port facilities in the Douro river that are needed for capturing new freight traffic
Rail connection to Haropa ports	Inland port	Improvement of rail connection of HAROPA Ports	1 435	Inland port rail connection	FR	2030	EUR 20 M	The action aims at improving rail connection to the 3 ports of HAROPA. It includes mainly infrastructure works for last mile sections, but also the launch of rail freight services.
Improvement of rail access to the port of Strasbourg	Inland port	Modernisation of railway access to the port (electrification, loading gauge adaptation, ERTMS, upgrade of the tracks)	1 435	Inland port rail connection	FR	2029	EUR 15 M	upgrade of the south railway access to the port (electrification, P 400 gauge, ERTMS, upgrade of railway line)
Upgrading rail access to port of Strasbourg - Phase 2	Inland port	Phase 2: Increasing capacity at the Port du Rhin station; Upgrading rail access to the port; Upgrading signalling and points equipment; Rail access to the port from the German network	1 435	Inland port rail connection	FR		EUR 2 M	Improvement of rail access to the port of Strasbourg, including internal tracks
Accesses to Port of Metz	Inland port	Widening (extension) of the "Porte de garde" of Metz-La Maxe's port - Moselle river	1 435	Inland port waterway connection	FR	2030	EUR 10 M	Improvement of waterway connection to the port of Metz

Core network Inland Waterways

Project name	Mode	Project description	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Inland Navigation in the Tagus Estuary up to Castanheira do Ribatejo	IWW	Inland Navigation in the Tagus Estuary up to Castanheira do Ribatejo	RIS Navigable channel	PT	2028	EUR 22 M	Create conditions to recover inland waterway transport in the port of Lisbon and the waterway connection to port terminals located in the upstream areas of the Port of Lisbon (Tagus estuary) and to the logistical activities area of Castanheira do Ribatejo.
Improvement of Douro Inland Waterway Accessibility	IWW	Geometric correction of Douro's inland waterway channel in two bottlenecks, the modernisation/upgrading of the five locks of the river – a fundamental navigation tool -, the new signalling and buoyage in the extension of the Douro's inland waterway and new equipment to support the emergency plan and to improve the conditions of the piers.		PT	2030	EUR 80 M	Interventions required to increase safety and security in the river. Interventions will also contribute to improve multimodal connections at port facilities along the river that are needed for capturing new freight traffic
Renovation of several locks in Seine River	IWW	Renovation and extension of locks in several location downstream and upstream Seine River		FR	2027	EUR 118 M	Interventions required to enhance the navigability in the river
Upgrade of Seine River	IWW	Upgrade of the upper Seine between Bray-sur-Seine and Nogent-sur-Seine section		FR	2031	EUR 343 M	Interventions required to enhance the navigability in the river

Extended core passenger network – International dimensions

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
New HSL Porto-Vigo	Rail	Project involves the implementation of the actions:						This project establishes a new cross-border high-speed

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
		Construction of the phase 1 of HSL Porto-Vigo between Braga and Valença do Minho	1 668	Speed >200 Km/h	PT/ES	2033	EUR 3.9 bn	connection between Porto and Vigo, strengthening passenger connectivity between northern Portugal and Galicia. It ensures the continuity of the Atlantic high-speed rail axis and improves integration of the Portuguese and Spanish high-speed networks.
		Construction of phase 2 of HSL Porto-Vigo between Porto airport and Braga	1 668			>2034		
		Construction of the southern exit of Vigo providing continuity to the high-speed Atlantic Axis south of Vigo, connecting with the Monforte-Redondela line	1 668			2032		

Extended core freight network – International dimensions

Project name	Mode	Project description	Track gauge	KPI	MS	Project end dates	Indicative Costs	Impact on the Corridor
Freight Axis Sines-Spain	Rail	Project involves the implementation of the actions:						This project reinforces the Sines–Madrid freight corridor by improving rail capacity and interoperability, supporting efficient freight flows from the Port of Sines towards Spain and the European network.
		Construction of new conventional line Sines-Grândola	1 668	740 m Loading gauge	PT	2040	EUR 496 M (costs for 740 m trains not foreseen)	
		Upgrade of Vendas Novas line, between Setil and Vendas Novas including stations for 740m freight trains	1 668	740 m		2029		
		Electrification and signalling of Linha do Leste	1 668	Electrification ERTMS		2034		
		Upgrade of Linha do Leste for 740m freight trains	1 668	740 m		2034		

Core and Extended core network – other projects

Project name	Mode	Project description	Type	Track gauge	KPI	MS	Project end dates	Indicative Costs	Current status
Aveiro border (HSL)	Rail	Construction of the new high-speed line between Aveiro-Viseu	International	tbd	High-speed	PT	2040	N/A	Aveiro – border (HSL)
Ligne Nouvelle Paris-Normandie (LNPN)	Rail	(1) Saut-de-mouton (flyover) in Paris Saint Lazare (2) Paris – Mantes-la-Jolie (HSL) (3) Rouen-Yvetot (HSL)	National	1 435	High-speed	FR	N/A	EUR 7.7 bn ⁽²²⁾	These projects are still under study with no confirmed timeline for completion. The steering committee held on 9 January 2026 has approved a roadmap to define a revised project by autumn 2026, by seeking the least impact on the territories while guaranteeing its socio-economic feasibility. The revised project shall propose an implementation in phases, according to a realistic schedule
Niort-Saintes-Ambarès	Rail	Electrification of the conventional line Bordeaux-Niort, between Ambarès-Saintes and Niort	National	1 435	Electrification	FR	N/A	N/A	There is no projected action.

Note: tbd - to be defined

⁽²²⁾ 2023 prices.

4.3. Conclusion and future outlook

A sustainable, smart and competitive Europe, connected with the wider world, relies on a strong transport sector and resilient infrastructure. The TEN-T serves as the backbone of our single market, facilitating smooth and efficient movement of people and goods.

The TEN-T Regulation prioritises network development, sets high standards for interoperability and better efficiency of the network. Beyond this, it aims to prepare the network to cater the mobility needs of tomorrow. With the Green Deal, the EU has set the pace for decarbonisation, notably through initiatives like Fit for 55, ReFuelEU Aviation, FuelEU Maritime, and the AFIR. The world has evolved rapidly in the last five years, and military mobility has become increasingly critical, highlighting the importance of transport infrastructure managers in ports, airports, roads and railways as they organise, improve and tackle various challenges. The last months have largely showcased the need to decarbonise transport and to accelerate the development of alternatives to fossil fuels energy, hence delivering on the TEN-T Regulation and all Fit for 55 package of regulations.

An effective and sustainable mobility system is today a key factor for economic competitiveness in Europe. Investing in a new, high-quality multimodal mobility system therefore not only guarantees that all citizens can be mobile and fully participate in society but also generates economic growth and creates jobs. The latent figures from Spain clearly highlight this phenomenon. With GDP growth expected to reach around 2.9% in 2026, Spain has made massive investments in transport infrastructure in recent years. Combined with other factors, these investments are helping sustain the momentum that is expected to keep Spain's growth above the European average in the coming years.

Transition requires strong public investment to build the foundations and reduce the risk for mobilising significant private-sector investment dynamic. Nevertheless, stable EU legislation is essential to ensure that all stakeholders - including private partners - are willing to engage and accept risks associated with significant investments, energy transitions and modal shifts. This stability fosters confidence and cooperation among all parties involved.

Transition also means wider use of mass-transit transport and better consideration to all direct and indirect costs of all modes of transport (accidents, congestion costs, air pollution, damage to and wear of infrastructure etc.). This would make it possible to introduce, where appropriate, levies that help establish a better level playing field between the different modes of transport and generate supplementary finance sources for investments in infrastructure. For instance, Member States have full control over setting VAT rates for passenger transport. Given the principle of fiscal neutrality, Member States should use this flexibility to

create fair competition among competing modes of transport. Additionally, Member States should explore and review methods to level the playing field by limiting subsidies and tax benefits for more carbon-intensive modes of transport.

In all cases, transport will keep expanding, and mobility will always find a path forward - the status quo simply does not exist. If we fail to prepare the infrastructure of tomorrow, today's most polluting modes will continue to dominate, bringing more road congestion and air pollution that harm both people and the environment. Looking at the state of compliance of the Corridor regarding road, we can see that the infrastructure has been built efficiently over the last decades, and it is now time to do as good or even better for the other modes of transport.

My vision as Coordinator for the Atlantic Corridor is therefore quite clear across all modes of transport:

High-Speed Rail

The high-speed rail network must be fully developed as soon as possible, as it clearly stands today as the alternative to short-haul flights, and which is clearly asked by citizens.

- The Paris-Madrid HSL should be fully connected by high-speed rail by around 2040. To reach this: (1) the completion of Paris-Bordeaux-Toulouse-Dax must coincide with the end of the next budgetary period of the EU, i.e. by 2034. (2) The DUP for Dax-Hendaye must be finalised within the same period at the very latest.
- The Lisbon-Madrid connection is expected to be completed by 2034, as stipulated in the existing Implementing Decision.
- The Lisbon-Porto HSL should also be completed within the scheduled timeline, or earlier under the condition it would not delay Madrid-Lisbon.

High-speed rail projects along the Atlantic Corridor are not just capable of sustaining themselves financially—they could deliver significant operational and economic benefits, particularly if the entire rail network is fully completed and interoperable. Although passenger variable-gauge rolling stock technology exists, full interoperability, adopting the European standard track gauge and ERTMS among others, would allow rail operators to run services in a more profitable way, reducing fleet complexity and potentially lowering investment, maintenance and operating costs.

These features on the European high-speed rail network will not only trigger more competition, hence more services and more revenues for the infrastructure manager, as higher quality travel for our citizens. Yet, it would also clearly deliver on the so-called dual use objective, in ensuring smooth military movements up to

the Atlantic ports of the Iberian Peninsula. In the near future, the vast majority of European high-speed services will operate on EU standard track gauge. Portugal's decision to build its new high-speed lines in Iberian gauge could have several drawbacks for its rail market. Competition on the network is likely to remain limited, and the procurement of modern high-speed rail rolling stock for the Iberian gauge may become increasingly challenging overtime.

Financing these mega projects is undoubtedly a major challenge for Member States, especially in a context of increasing budgetary pressure. The Atlantic Corridor is a real source of inspiration when it comes to financing schemes for the high-speed rail network. Portugal's high-speed rail programme is fully structured around a PPP strategy that relies on the deconsolidation of investments from the State accounts. Spain's high-speed rail system, by contrast, is 100% publicly financed but also relies on a strategy of deconsolidation from the State accounts through the creation, in 2013, of ADIF Alta Velocidad, a non-financial corporation in the sense of the Eurostat classification. France also has solid experience with PPP financing, although these projects are not deconsolidated from the State accounts.

Besides selecting the most appropriate financing model, reducing overall construction costs remains essential for the timely delivery of major infrastructure projects. Lengthy permitting processes can significantly increase project costs, mainly due to inflation, higher financing costs and increased uncertainty for investor. In this context, Spain Portugal and France are encouraged to make full use of the provisions provided under the Streamlining Directive, particularly for TEN-T cross-border sections such as Caia-Badajoz and Bordeaux – Vitoria. These provisions allow for accelerated permitting procedures, including the designation of a single authority to coordinate permits and thereby reduce administrative complexity.

Finally, optimising the revenues and the overall profitability of investments is also crucial. In this context, I would emphasise the importance of considering multi-use synergies that can further enhance the economic value of these infrastructures. This includes maximising value not only from rail operations but also from the commercial development of stations and from dual-use opportunities in sectors such as energy and telecommunications. Regarding rail operations, ensuring that operators can develop new services and fully benefit from the infrastructure also requires anticipating the needs for maintenance facilities with sufficient capacity, including workshops capable of carrying out level 1 and level 2 maintenance.

Rail freight

For the rail freight network, there is a risk that some sections may not meet the 2030 TEN-T deadline for some requirements on some sections of the network. It

is therefore of the highest importance to ensure clear prioritisation of investments based on major traffic flows, including cross-border freight flows.

Between Spain and Portugal, the Beira Alta line has been renovated and adapted for 740-meter trains. It is important that such trains can operate efficiently between the ports of Leixões and Aveiro and the Spanish network, notably towards Salamanca and Valladolid.

Between France and Spain, more than 10 000 trucks cross the Pyrenees every day along the Atlantic Corridor, clearly highlighting the strong potential for a modal shift to rail. The future transshipment hub is expected to move to Vitoria once the Y Basque and the installation of the third rail between Astigarraga and Irún are completed, around 2030–2032. This will allow EU standard gauge freight trains of up to 740 metres to operate from these hubs towards France, thereby facilitating modal shift. These additional flows would require capacity enhancement on the French network.

Spain has committed to anticipating the adaptation of its infrastructure to a wider loading gauge in order to enable the transport of 4.20-metre loading units from Algeciras up to Zaragoza. Spain is also assessing similar adaptations on the Galicia-Madrid/Zaragoza axis. As the Y Basque infrastructure will be compatible for such loading gauge, it is crucial that France prepares the connection on the other side of the border, otherwise, trucks will continue to dominate cross-border traffic, leading to further road congestion.

Finally, for both freight and passenger transport, the electrification of rail lines remains essential, particularly in view of the 2030 deadline. The deployment of ERTMS should also be prioritised on cross-border sections connecting major origin–destination nodes for both freight and passengers. This is especially important where delays in new infrastructure projects occur, as the long return periods for such investments—often exceeding ten years—must be offset by higher levels of interoperability and by maximising the capacity of the existing network.

Ports

Besides being key multimodal hubs within the overall mobility system, ports are increasingly important in both their industrial and logistics dimensions. Many have developed into major industrial clusters of Europe's fossil-based economy, hosting a significant share of the continent's refineries and maintaining strong links with key industries in their surrounding regions.

Atlantic Ports should therefore be recognised not only as key TEN-T infrastructure but also as logistics, industrial and energy hubs within the Corridor. Their development is relevant to supply-chain resilience, the energy transition and the competitiveness of the Atlantic gateway. They also play a crucial role in the Military Mobility network acting as strategic dual-use infrastructure.

Port infrastructure managers therefore have a crucial role to play in organising the transition together with the entire chain of stakeholders. This will be essential to meet the objectives of the energy transition, not only for the transport sector but for the broader economy. Ports can contribute both through the production and distribution of renewable energy and by supporting the decarbonisation of surrounding industries—for example by enabling the shipment of captured CO₂ to offshore storage sites, or by facilitating the deployment of new renewable energy sources.

Ports along the Atlantic Corridor are leaders in offshore wind development, including floating wind technologies, as well as in the development of solar energy and projects for hydrogen production and energy storage. Ports developing renewable energy production capacity could also become key suppliers of Sustainable Aviation Fuel (SAF) to airports. The Port of Nantes-Saint Nazaire is a frontrunner in this field. Yet, I do believe that such initiatives could be further expanded across the Atlantic Corridor.

Transformative and innovative projects supporting the transition of ports into energy hubs should be facilitated - for instance, by adapting the legal framework to simplify environmental procedures in industrial areas that already belong to ports or have previously been used for industrial purposes.

Short Sea Shipping and Ro-Ro traffic should also be further promoted, particularly where rail interoperability remains limited.

Regarding rail hinterland connections, ports should prioritise investments enabling 740-metre train operations on their access lines and encourage terminal operators to follow where the rail infrastructure is already compliant or close to becoming compliant – Chapter 3.1 gives a good indication where such investments should be prioritised.

Finally, the competitiveness of our ports should be preserved in relation to the EU Emissions Trading System (ETS), particularly for non-EU transshipment activities, pending a global agreement under the IMO. On the Atlantic Corridor, ports such as Algeciras, Sines, Le Havre and the Canary Islands are particularly exposed, by as non-EU transshipment traffic represents an important component of their activity.

Airports

Regarding airports, I would like to emphasise the importance of connecting them to high-speed rail, not only to major urban nodes but also to each other. The future of air transport will increasingly rely on the concentration of long-distance routes in major airport hubs. In this context, high-speed rail can play a key role by ensuring efficient access to these hubs and, where relevant, by enabling passengers to transfer between airports by rail.

In practice, the catchment area of major airports such as Madrid and Lisbon might expand to citizens from Galicia, Alentejo, Extremadura or Andalusia; while citizens from Occitanie, Nouvelle-Aquitaine, Bretagne or Pays de la Loire would increasingly rely largely on Paris airports. A similar logic could apply in Ireland: by strengthening the rail connection between Cork/ Limerick/ Belfast to Dublin, citizens from across the island should be able to reach Dublin Airport directly by rail—first through interchange to the future metro in Dublin city centre and ultimately through an end-to-end heavy rail journey.

In practice, I strongly welcome the plans to develop high-speed rail connections to the airports of Lisbon, Madrid and Porto. I would also underline the importance of considering a rail connection to Dublin Airport, in particular with a first step aiming to define the precise routing and protect this alignment before 2030, complementing the planned MetroLink project. While these investments are significant, they represent the mobility system of tomorrow.

Another important aspect concerns the evolving role of airports as energy hubs and as organisers of off-take agreements for SAF. Along the Atlantic Corridor, the Take Kair project is a notable example, aiming to produce SAF for the airports of Nantes and Paris, as well as ongoing refinery adaptation projects in Spain, including the conversion of three existing facilities, and Iberia's initiative to develop its own dedicated production plant.

Road and urban Nodes

In transport planning, the so-called “chicken and egg” dilemma is often overstated. Infrastructure must be in place first to enable citizens and industries to adopt new mobility solutions. In this context, the electrification of road transport must be accelerated. At the same time, it is also clear to me that road transport remains particularly suited for last-mile operations, while revenues generated from road congestion should contribute to financing the optimisation and efficiency of the rail system.

Urban nodes are often the most congested segments of the overall transport chain, whether they function as origin–destination hubs or as transit hubs. This is particularly the case for cities such as Bordeaux, Zaragoza, Madrid, Valladolid, Sevilla, Lisbon, Porto and Paris.

Urban nodes also play a crucial role in supporting the energy transition of surrounding industries, ports and the wider logistics chain. In this context, Sustainable Urban Mobility Plans (SUMP) and Sustainable Urban Logistics Plans (SULP) are key instruments to facilitate coordination and dialogue between all stakeholders. Such a transition can only succeed if it is developed as a collective effort.

Finally, urban nodes must ensure accessible and efficient mobility for all citizens. High-speed rail can connect cities much faster, but the transport system within

the node must also be adapted so that the last mile is equally efficient and user-friendly.

My vision for the near future: 2030 and 2035

The immediate next step will be the negotiation of a Corridor Implementing Decision with the Member States of the Corridor. The milestone plan presented in this work plan should serve as the basis for this decision, with the objective of setting clear milestones to achieve our targets without further delay. The Corridor Implementing Decisions should also establish governance structures to monitor the development of the cross-border projects on both sides of each border along the Corridor.

In my view, the Corridor Implementing Decision should also serve as a reference for future EU funding, including the opinions that I will be asked to provide during the evaluation phase of the project applications under CEF.

In the same spirit, I strongly encourage Member States of the Corridor to commit the necessary funding for at least the next ten years, particularly for the high-speed rail projects identified in the future Corridor Implementing Decision. Such long-term commitments should be protected from annual budgetary revisions, as projects of this scale require stability and financial certainty.

Finally, given the size of the project portfolio of the Atlantic Corridor, being it rail, waterborne, or decarbonisation of air, road and shipping, I would also like to engage more often with the EIB and the National Promotional Banks and Institutions of the Corridor, as they are our natural partners to facilitate projects developments. To conclude, what I want is:

- By 2030, to hop on a high-speed rail train and travel from Madrid to Lisbon in less than five hours.
- By 2032, to board a high-speed rail train from my hometown in Luxembourg to Toulouse in less than six hours.
- Before 2035, to hop on a high-speed rail train to make Madrid to Bordeaux in less than five hours, and Madrid to Paris in less than seven hours!

Let us make it happen!

ANNEXES – ANALYTICAL ANALYSIS

5. Annex 1: The Atlantic Corridor infrastructure

The Atlantic European Transport Corridor comprises a railway network of more than 13 500 km, over 5 700 km of roads and 776 km of inland waterways across four river basins: the Seine, Douro, Guadalquivir and the Tagus. The Corridor connects Multimodal Freight Terminals located in 25 ports, including maritime, inland and inland waterway ports, and 27 rail–road terminals distributed along its alignment.

A total of 58 urban nodes and 13 airports are located on the Corridor, including the capital cities of four EU Member States: Lisbon, Madrid, Paris and Dublin. Table 5-1 provides an overview of the linear and nodal infrastructure by Member State, while the list of Atlantic Corridor nodes is presented in Table 5-2.

Across three Member States, Portugal, Spain and France, the Atlantic Corridor encompasses all transport modes. In Germany, the Corridor includes a rail branch of approximately 170 km extending from the border at Saarbrücken towards Mannheim, integrating both the inland port and the associated Multimodal Freight Terminal.

In Ireland, the Atlantic Corridor includes the ports and airports of Dublin and Cork, as well as the port of Shannon Foynes, together with the relevant last-mile connections to these nodes. The main Irish road and railway networks, however, are part of the North Sea–Rhine–Mediterranean Corridor.

The maritime link between Huelva and the Canary Islands forms an integral part of the Atlantic Corridor infrastructure. As such, the Atlantic European Transport Corridor is the only European Transport Corridor that formally includes outermost regions within its alignment, reinforcing its Atlantic gateway dimension and strategic maritime role.

Table 5-1: Linear and Nodal Infrastructure per Member State in the ATL ⁽²³⁾

	Rail (km)	Road (km)	IWW	Airport	Seaport	Inland port	Multimodal Freight Terminal ⁽²⁴⁾	Urban Node
DE	170	-		-	-	1	1	4
FR	5 317	2 328	373	4	5	6	7	17
ES	6 044	2 560	92	5	9	1	9	26
PT	2 021	902	311	2	3	2	10	9
IE	-	-		2	3	-	-	2
Total	13 552	5 790	776	13	20*	10*	27	58

* of which 5 inland/maritime

Source: ATL Consultants

⁽²³⁾ The values in the Work Plan are derived from the TENtec database. National infrastructure databases may differ from those values due to other methodologies.

⁽²⁴⁾ Information regarding MFT is subject to reservation with respect to the identification and results of the market and future analysis conducted by the Member States.

Table 5-2: ATL corridor list of nodes

	Airports	Seaports	Inland port	MFT ⁽²⁵⁾	Urban node
DE	-	-	Mannheim	Mannheim/Ludwigshafen	Kaiserslautern Ludwigshafen Mannheim Saarbrücken
FR	Bordeaux-Mérignac Toulouse-Blagnac Paris - Charles de Gaulle Paris - Orly	Brest Bordeaux Nantes-st-Nazaire Le Havre Rouen	Chalon Sur Saone Le Havre Metz Paris Rouen Strasbourg	Bayonne-Mouguerre (Centre Européen de Fret) Bordeaux (Bordeaux Hourcade) Dijon (Gevrey) Le Havre (Port du Havre) Paris (Port Genevilliers) Strasbourg (Terminal Nord de Strasbourg) Toulouse (Fenouillet)	Angers Bordeaux Brest Dijon Le Havre Metz Nancy Nantes Orléans Paris Poitiers Reims Rennes Rouen Strasbourg Toulouse Tours

⁽²⁵⁾ Information regarding MFT is subject to reservation with respect to the identification and results of the market and future analysis conducted by the Member States.

	Airports	Seaports	Inland port	MFT ⁽²⁵⁾	Urban node
ES	Bilbao Las Palmas Madrid - Barajas Sevilla Tenerife-S – Reina Sofia	A Coruña Bahía de Algeciras Bilbao Gijón Huelva Las Palmas Santa Cruz de Tenerife Santander Sevilla	Sevilla	Alcazar de San Juan Bilbao Cordoba León Madrid (norte y Sur) Sevilla Valladolid Vitoria-Gasteiz (Júndiz) Zaragoza	A Coruña Algeciras Badajoz Bilbao Burgos Cáceres Córdoba Gijón Huelva Jerez de la Frontera Las Palmas de Gran Canaria León Logroño Madrid Ourense Oviedo Pamplona Salamanca San Sebastián Santa Cruz de Tenerife Santiago de Compostela Sevilla Valladolid Vigo Vitoria-Gasteiz Zaragoza
PT	Lisbon Porto - Sá Carneiro	Leixões Lisbon/Setúbal Sines	Leixões (Douro) Lisbon	Alfarelos AML – Alcont ¹ AML - Bobadela Central ¹ AML - Bobadela North AML - Bobadela South ¹ AML - Lisbon Norte AMP - Leixões AMP – Valongo SPC AMP - Gaia ² Pampilhosa Poceirão ³ Sines ZAL & ZILS	AM Lisbon AM Porto Barcelos Braga Coimbra Évora Leiria Vila Nova de Famalicão Viseu

	Airports	Seaports	Inland port	MFT ⁽²⁵⁾	Urban node
IE	Cork Dublin	Cork Dublin Shannon-Foynes	-	-	Cork Dublin
Total	13	20*	10*	27	58**

* of which 5 inland/maritime

** The urban nodes of Santander in Spain and Guimarães in Portugal were not included in the TEN-T Regulation as Atlantic Corridor urban nodes by the time of the adoption of the Regulation. Given their close articulation to the corridor, these urban nodes are following the corridor activities.

¹ The TEN-T Regulation identifies in AML four terminals in Bobadela, but the 3 signalled were deactivated as a result of the World Youth Day 2024. Those three terminals have been removed from the analysis.

² Three terminals are detailed in the TEN-T Regulation for AMP (Leixões, Valongo and VN Gaia). VN Gaia is a shunting facility, not a terminal. Therefore, it has been removed from the analysis.

³ To be developed (terminal is foreseen to be developed since 1996, but no plans or projects are identified)

Source: ATL Consultants

The Atlantic European Transport Corridor intersects with several other European Transport Corridors, reflecting its role as a major Atlantic gateway and transversal backbone within the TEN-T network. These overlaps are a structural feature of the Corridor as established under Regulation (EU) 2024/1679 and are essential to ensuring network continuity, resilience and multimodal efficiency.

On the Iberian Peninsula, the Atlantic ETC overlaps with the Mediterranean European Transport Corridor, notably in Spain. This overlap provides a strategic interface between the Atlantic and Mediterranean basins, enabling east–west continuity for both passenger and freight traffic and supporting alternative routing options across the peninsula. It plays a key role in integrating Atlantic ports and hinterland regions with Mediterranean logistics chains and international trade routes.

In France, particularly in the Paris region and along northern sections of the Corridor, the Atlantic ETC overlaps with the North Sea–Rhine–Mediterranean European Transport Corridor. These shared sections support high-capacity passenger and freight flows between the Atlantic façade, northern France and the North Sea range, while reinforcing access to major urban nodes and industrial regions. Moreover, the Atlantic corridor also shares with the North Sea–Rhine–Mediterranean corridor three Irish ports, while road and rail are only part of that corridor.

Further east, in the Strasbourg and Mannheim area, the Atlantic ETC overlaps with both the Rhine–Danube and the North Sea–Rhine–Mediterranean European Transport Corridors. These interfaces create a critical junction between the Atlantic façade, the Rhine corridor system and the Danube basin, strengthening long-distance freight flows, multimodal integration and the strategic redundancy of the European transport network.

Together, these overlaps enhance corridor-level synergies, facilitate coordinated investment and maximise the added value of the Atlantic European Transport Corridor within the wider TEN-T framework. They ensure that the Corridor functions not in isolation, but as an integral component of a fully interconnected, resilient and future-oriented European transport network.

6. Annex 2: Corridor's State of Compliance and technical status

Regulation (EU) 2024/1679 establishes binding infrastructure and operational standards to ensure the development of a high-performance, multimodal Trans-European Transport Network. These standards must be met by 31 December 2030 for the core network and by 31 December 2040 for the extended core network. Where requirements have been newly introduced by the 2024 revision, compliance deadlines may extend to 2040 for the core network, for example in the case of the 160 km/h design speed requirement for passenger railway lines. In addition, specific deadlines apply to certain obligations, including the completion of track gauge assessments by 19 July 2026 and the market analysis for Multimodal Freight Terminals by 19 July 2027.

The TEN-T Regulation defines three categories of requirements:

- (a) infrastructure standards (e.g. electrification, design speed, ERTMS deployment);
- (b) operational obligations (e.g. train length operations, intermodal capabilities), and;
- (c) planning requirements (e.g. SUMP, migration plans, market studies).

Together, these requirements form the basis for a structured and quantitative assessment of corridor development. Central to this approach are the Key Performance Indicators (KPIs), which are monitored through TENtec. In addition, other Indicators provide complementary insights into corridor quality and performance, support a more comprehensive assessment of the network and do not require encoding in TENtec. Missing Links identify sections of the network that are absent, incomplete or not yet operational. Their completion carries the same legal importance as compliance with KPIs.

As Multimodal Freight Terminals will only be formally designated by Member States following the adoption of the relevant market studies in 2027, the airports, maritime and inland ports, as well as rail–road terminals listed in Annex II of the TEN-T Regulation have been used, at the request of the European Commission, as a proxy for assessing the current technical status of MFTs. This approach is intended to support Member States in preparing their forthcoming assessments.

This chapter presents the technical state of the Atlantic European Transport Corridor as of 31 December 2023, with updates from Member States during the summer of 2025. In addition to the baseline assessment, the analysis considers the expected impact of ongoing and planned projects on the Corridor's compliance status.

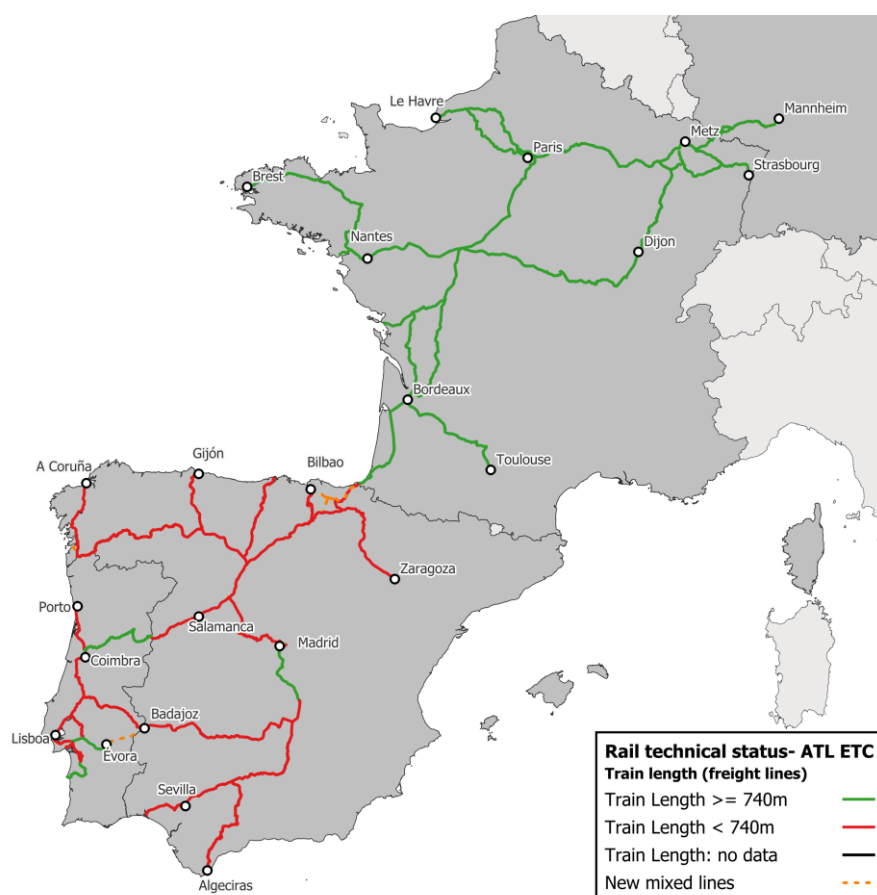
6.1. Rail compliance status

This section presents the technical compliance of the Atlantic railway network for key rail infrastructure parameters at Corridor level by the end of 2025.

6.1.1. Operation of freight trains with a train length of at least 740 m

All rail freight sections in Germany and France are fully compliant for the operation of 740 m trains. In Spain, this is only possible in the sections between Villaverde Bajo and Alcazar de San Juan. In Portugal, the operation of 740 m trains is possible along the Beira Alta line, between Poceirão and Évora and Sines-Ermidas-Sado. Figure 6-1 presents the status of compliance of the Atlantic ETC in terms of train length by the end of 2025. Some sections in the Northeast of Spain have been upgraded since then.

Figure 6-1: Rail infrastructure status of the parameter 'train length' (December 2025)



Source: ATL consultants based on data collected from various sources and countries' Infrastructure Managers

* KPI data reflect the compliance status as of 31 December 2023 and Corridor countries' feedback on the Corridor Study Update report received by August 2025 ** New mixed lines are currently under construction or authorisation process and shall enable the 740 m trains length operations.

6.1.2. European standard track gauge on new lines

All passenger rail sections in Germany and France are in European standard track gauge. The rail network in Spain is 35% with EU standard track gauge (including some sections with mixed gauge) and 65% is in Iberian track gauge (1 668 mm). Sections in European track gauge largely correspond to high-speed passenger lines. Exceptions include the alignments A Coruña–Vigo, Santiago de Compostela–Ourense and Badajoz–Mérida–Cáceres, which remain in Iberian gauge equipped with polyvalent sleepers to facilitate future migration.

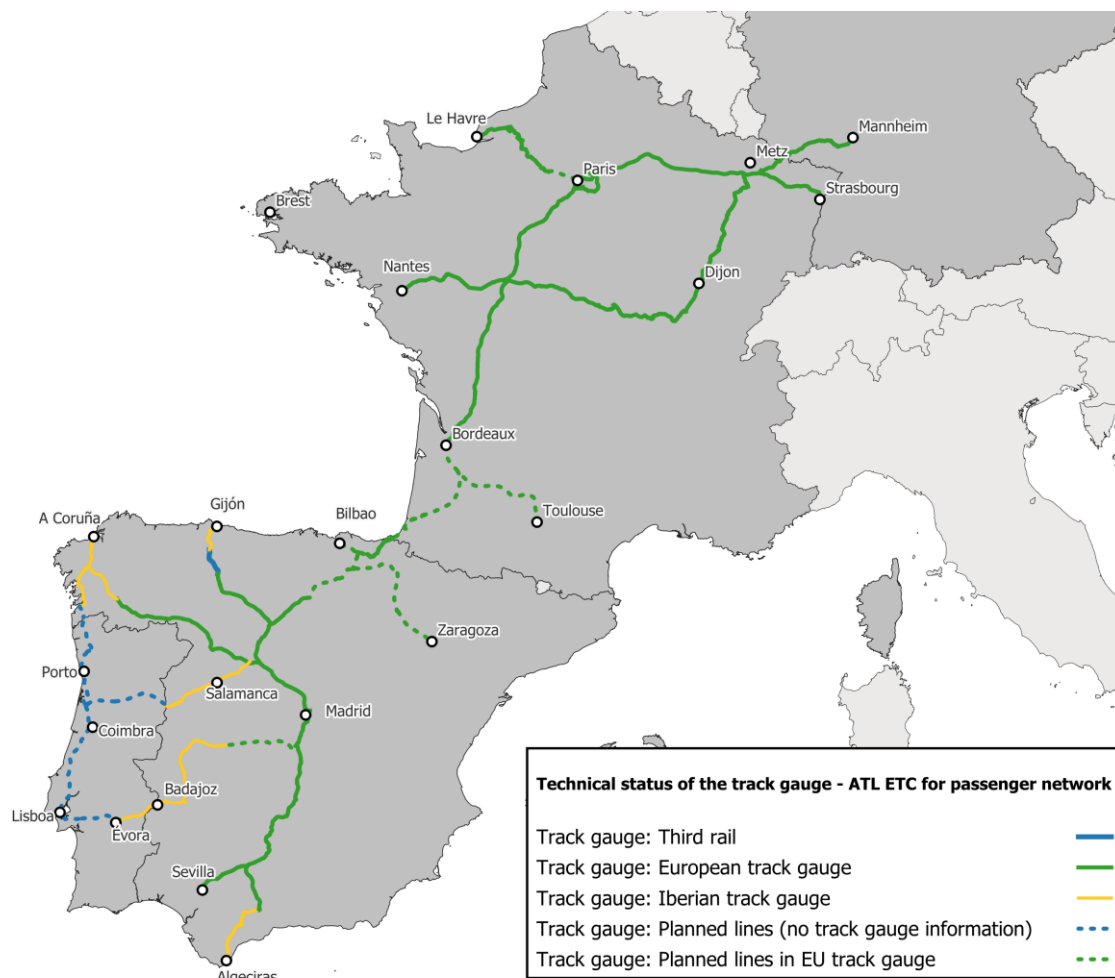
In Portugal, all existing lines are in Iberian track gauge. The line currently under construction between Évora and the Spanish border ⁽²⁶⁾ has been built (pending trackside authorisation) in Iberian gauge with polyvalent sleepers to allow future migration to the European standard gauge.

Member States must define migration assessments for existing networks where non-standard gauges are in use. According to Article 17(1), the new lines between Lisbon–Évora ⁽²⁷⁾ and Talayuela - Madrid, and Lisbon-Porto should be in European track gauge by 2030, and Porto-Vigo by 2040. Figure 6-5 presents the status of the Atlantic ETC in terms of track gauge.

⁽²⁶⁾ Works concluded in December 2025, the line will start the certification process in 2026 and operation is foreseen to begin still in 2026.

⁽²⁷⁾ Regarding the Lisbon–Évora high-speed line, there are diverging views as to whether this section constitutes a new railway line subject to Article 17(1), and the matter remains under discussion.

Figure 6-2: Rail infrastructure status of the parameter 'track gauge' for passenger network (December 2025)



Source: ATL consultants based on data collected from various sources and countries' Infrastructure Managers

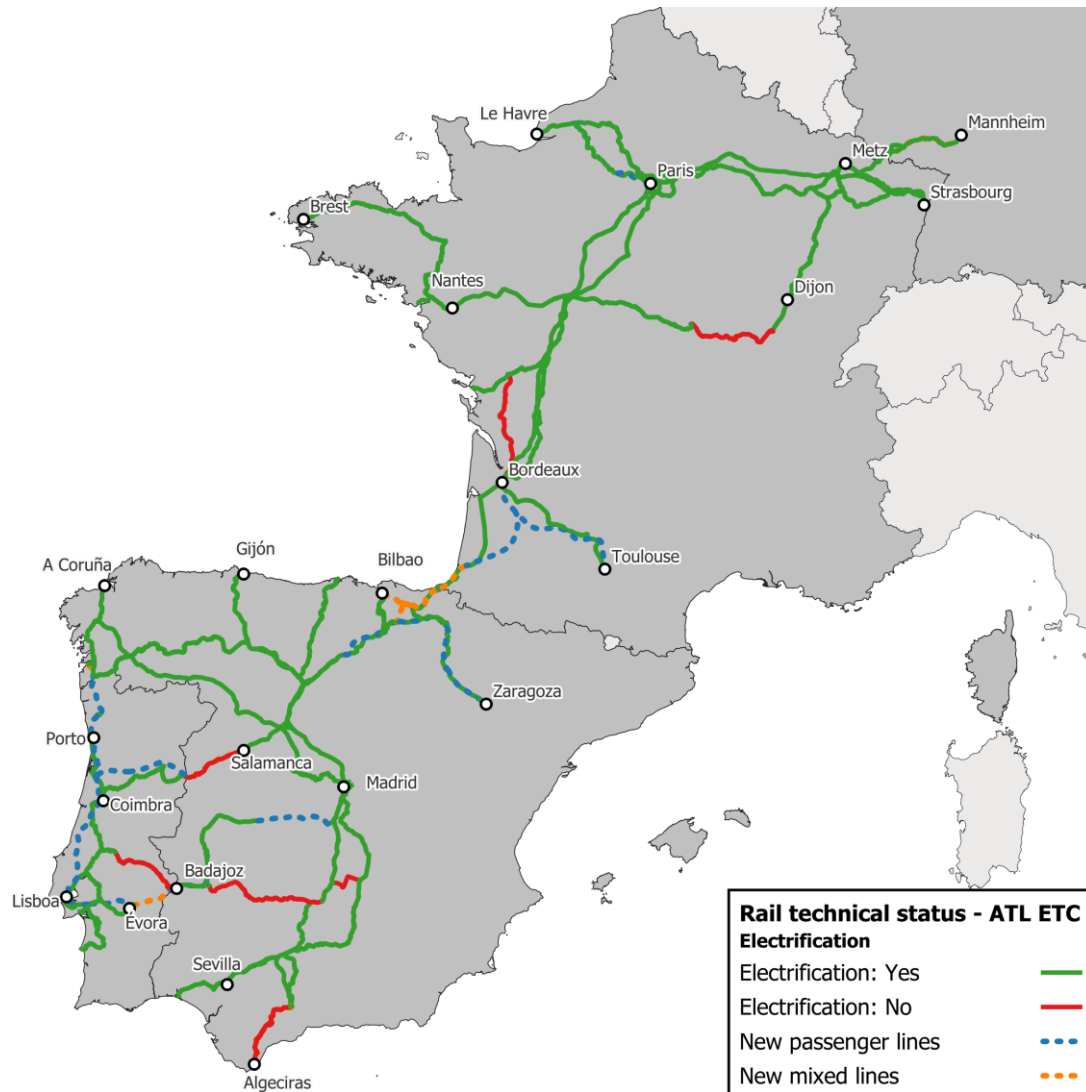
6.1.3. Electrification

Most of the Atlantic Corridor is fully electrified. In France, the remaining non-electrified sections are located between Nevers–Montchanin–Chagny and Niort–Saintes–Ambarès. Modernisation works are foreseen on the existing line between Nevers and Chagny/Corpeau, including its connection to the Paris–South-East high-speed line at Le Creusot–Montceau–Montchanin TGV station. However, electrification is not currently included in the scope of these works.

In Spain, this includes the cross-border section Fuentes de Oñoro–Salamanca, the freight line Mérida–Puertollano and the section between Antequera and Algeciras. Electrification works are ongoing on two of these sections, while works on the Mérida-Puertollano section are planned.

In Portugal, the non-compliant section in terms of electrification correspond to the extended core freight line between Abrantes and Elvas (Linha do Leste), for which electrification works are planned. Figure 6-3 presents the status of compliance of the Atlantic ETC in terms of electrification.

Figure 6-3: Rail infrastructure status of the parameter 'electrification' (December 2025)



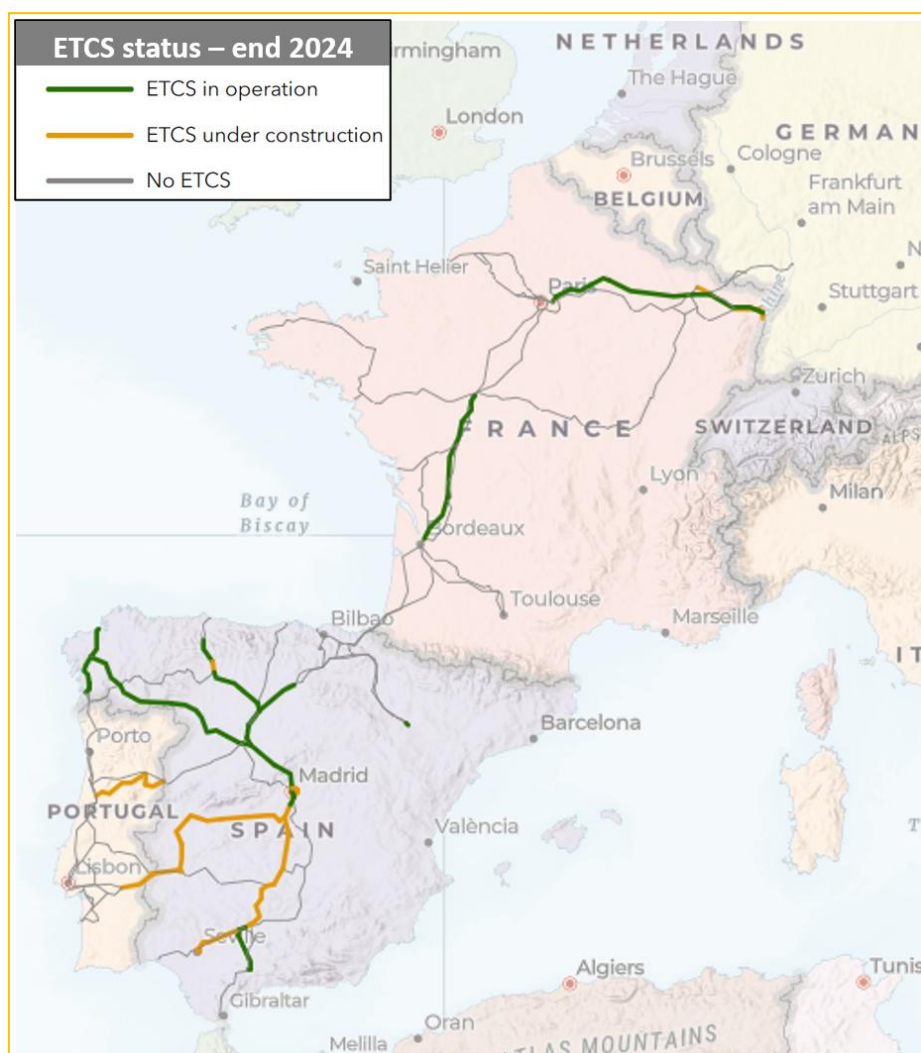
Source: ATL consultants based on data collected from various sources and countries' Infrastructure Managers

6.2. ERTMS compliance status

The total length of the ATL ETC is of approximately 13 600 km. At the end of 2024, ETCS was in operation on 14% (i.e. approximately 1 900 km) of the Atlantic Corridor, and it was under construction on 9% of its extension (i.e. approximately 1 300 km). In addition, GSM-R was operational on 46% of the Corridor.

The following map illustrates the status of the ATL Corridor at the end of 2024.

Figure 6-4: ERTMS status of the Atlantic ETC end of 2024 ⁽²⁸⁾



Source: Third Work Plan of the European Coordinator Matthias Ruete: Annex V ⁽²⁹⁾

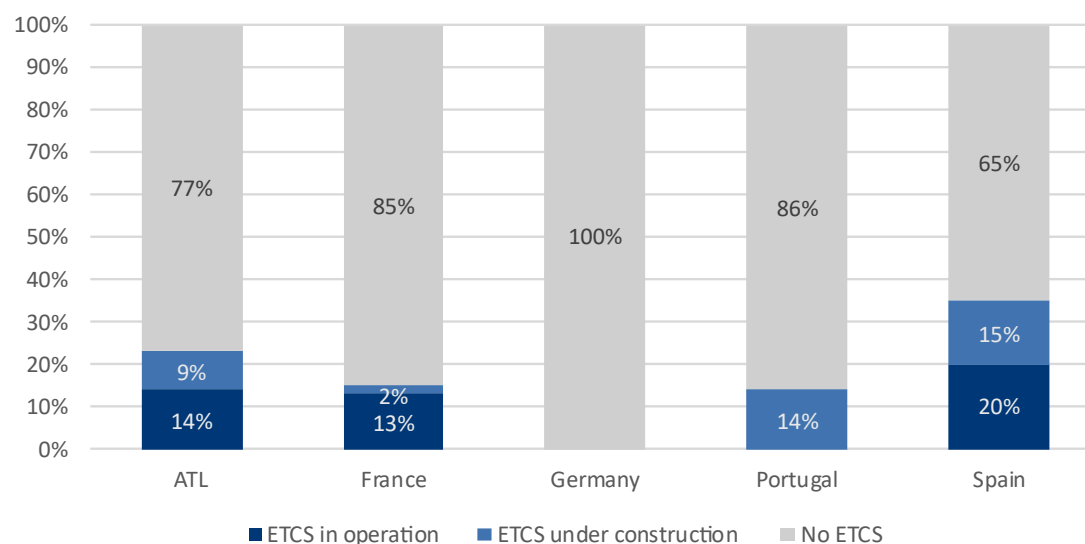
⁽²⁸⁾ The ERTMS data are based on the ERTMS Work Plan published in February 2026 and typically refer to a cut-off date of end 2024. Since then, the situation in some Member States may have evolved, sometimes also altering the projections for deployment in 2030 or beyond. More recent data will be published at the latest in the annual update of the ERTMS work plan. For instance, in Portugal, Porto-Lisbon, Porto-Vigo have not been taken into account and in Germany, the value by 2030 can be confirmed, while the values after 2030 cannot as the digitalisation strategy is currently being revised. Without prejudging the outcome of the digitalisation strategy, Germany wants to keep the ERTMS deployment ambitious. In Spain, Burgos - Vitoria (2032) and Zaragoza - Pamplona - Vitoria will be equipped 2035 and were not included in this assessment.

⁽²⁹⁾ Available at: [link](#).

Note: ERTMS will be deployed in Spain on the following sections which are under construction: "Burgos-Vitoria", "Y Basque" and "Zaragoza-Pamplona-Y Basque".

The following graph shows the status of ETCS deployment on the ATL ETC by country at the end of 2024.

Figure 6-5: ETCS deployment by country on the Atlantic ETC



Source: Third Work Plan of the European Coordinator Matthias Ruete: Annex V ⁽³⁰⁾

6.3. Rail Freight Operational requirements

Besides its technical standards, the TEN-T Regulation introduces a number of operational performance targets at rail border crossings, that is, average cross-border dwell times not exceeding 25 minutes (with limited exceptions) and at least 75% of cross-border freight trains arriving on time or within +30 minutes at destination by reasons directly attributable to infrastructure managers (IM).

Dwell time should be calculated based on the total additional transit time that can be attributed to the existence of the border crossing, irrespective of procedures or considerations of infrastructure, operational, technical and administrative nature.

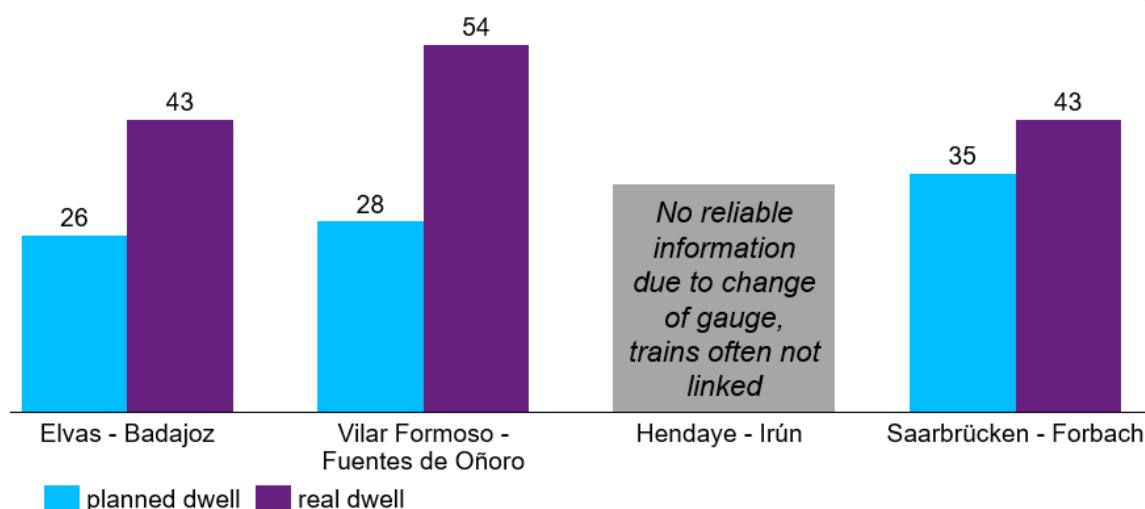
On the selected border crossings, the average dwell time exceeds 25 minutes, as shown in the figure below. However, it should be noted that the figures show approximation to the KPI and its targets. As presented by the Rail Freight Governance of the Corridor, it is not possible so far to automatically distinguish time that can be attributed only to the existence of the border crossing from dwell time in operational points at the border that might be caused by other reasons.

⁽³⁰⁾ Available at: [link](#).

Due to the change of gauge, the dwell time target does not apply to the border crossing between Hendaye and Irún.

The Atlantic Corridor is currently not compliant for the selected border crossings, exceeding the average dwell times in all borders, as presented in the figure below.

Figure 6-6: Average dwell times in cross-border sections of RFC Atlantic in 2025 (min per train)



Source: Atlantic RFC

The arrival punctuality reaches 66.9% below the threshold of at least 75% of cross-border freight trains arriving on time or within +30 minutes at destination.

To work on improvements, Quality Circles (QCOs) with RUs and terminal operators have already been put into place for Saarbrücken-Forbach and Hendaye-Irún. The first QCO meeting for borders ES-PT took place in May 2026.

6.4. Multimodal freight terminal provisional technical status

Prior to Member States completing their national market and prospective analyses on Multimodal Freight Terminals (MFTs) – as required under Article 36(3) of the TEN-T Regulation (due by July 2027) – the present assessment relies on the terminals listed in Annex II of the Regulation (column “Rail-Road Terminals”). The methodology for the assessment of the MFTs is described in chapter 3.1.1.2. Accordingly, the present chapter provides a provisional view on the technical status of the MFTs regarding the TEN-T requirements.

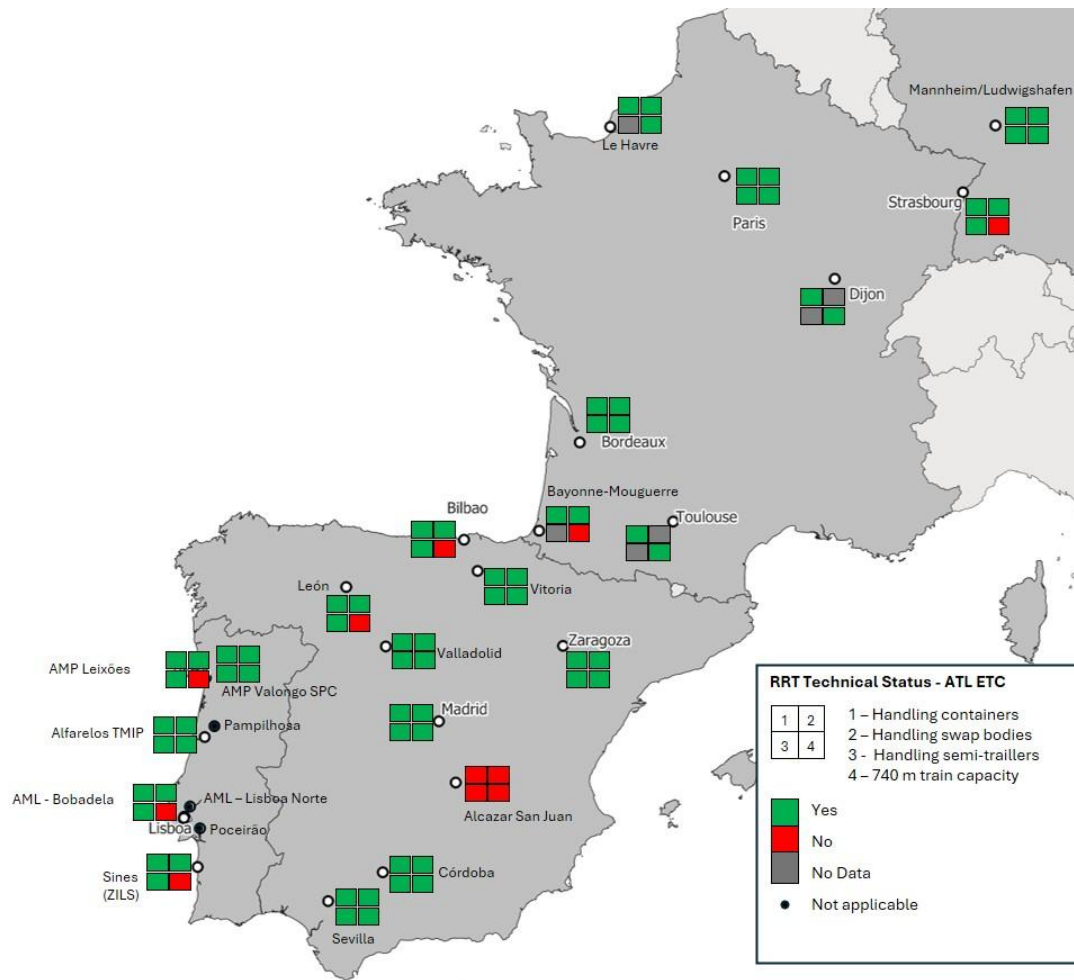
The terminals of Strasbourg and Bayonne–Mouguerre (in France), Bilbao, León, Madrid (Sur), Alcazar de San Juan (in Spain), Leixões Lisboa Bobadela and

Sines-ZILS (in Portugal) are currently unable to accommodate 740 m long trains without manipulation and would require operational adaptations to handle longer trains. Remaining corridor terminals meet this requirement.

Works are ongoing at Bayonne–Mouguerre to extend the terminal and enable the accommodation of 740 m long trains. While the terminals of Valongo (SPC) and Alfarelos (TMIP) in Portugal are able to accommodate 740 m long trains without manipulation, the main lines serving those terminals are not yet able to accommodate longer trains. Works are ongoing on the North Line, while access to the Valongo terminal is currently provided via the Douro Line, which is not part of the TEN-T network. Similar case occurs in Spain for the Sevilla terminal.

Figure 6-7 presents the results the Corridor's Multimodal Freight Terminal technical status.

Figure 6-7: ATL Multimodal Freight Terminal technical status, 12/2023*



Source: ATL consultants based on data collected from various sources and Corridor countries' Infrastructure Managers

* KPI data reflect the compliance status as of 31 December 2023 and Member States' feedback on the Corridor Study Update report received by August 2025. ** Valladolid terminal entered in operation in May 2026.

6.5. Road compliance status

The Atlantic **road network is totally complete and compliant** for the key TEN-T parameters (Table 6-1).

Table 6-1: ATL road compliance status, 12/2023*

		Corridor	DE	FR	ES	PT	IE
Network length (km)		5 790	-	2 328	2 560	902	-
Of which new constructions (km) ¹⁾		0	-	0	0	0	-
Separation of road carriageways for the two directions of traffic by a dividing strip not intended for traffic	Yes	100%	-	100%	100%	100%	-
	No	-	-	-	-	-	-
	No data	-	-	-	-	-	-
No crossings at grade with any road, railway or tramway track, bicycle part or footpath	Yes	100%	-	100%	100%	100%	-
	No	-	-	-	-	-	-
	No data	-	-	-	-	-	-
ITS implementation	Yes	100%	-	99%	100%	100%	-
	No	-	-	1%*	-	-	-
	No data	-	-	-	-	-	-

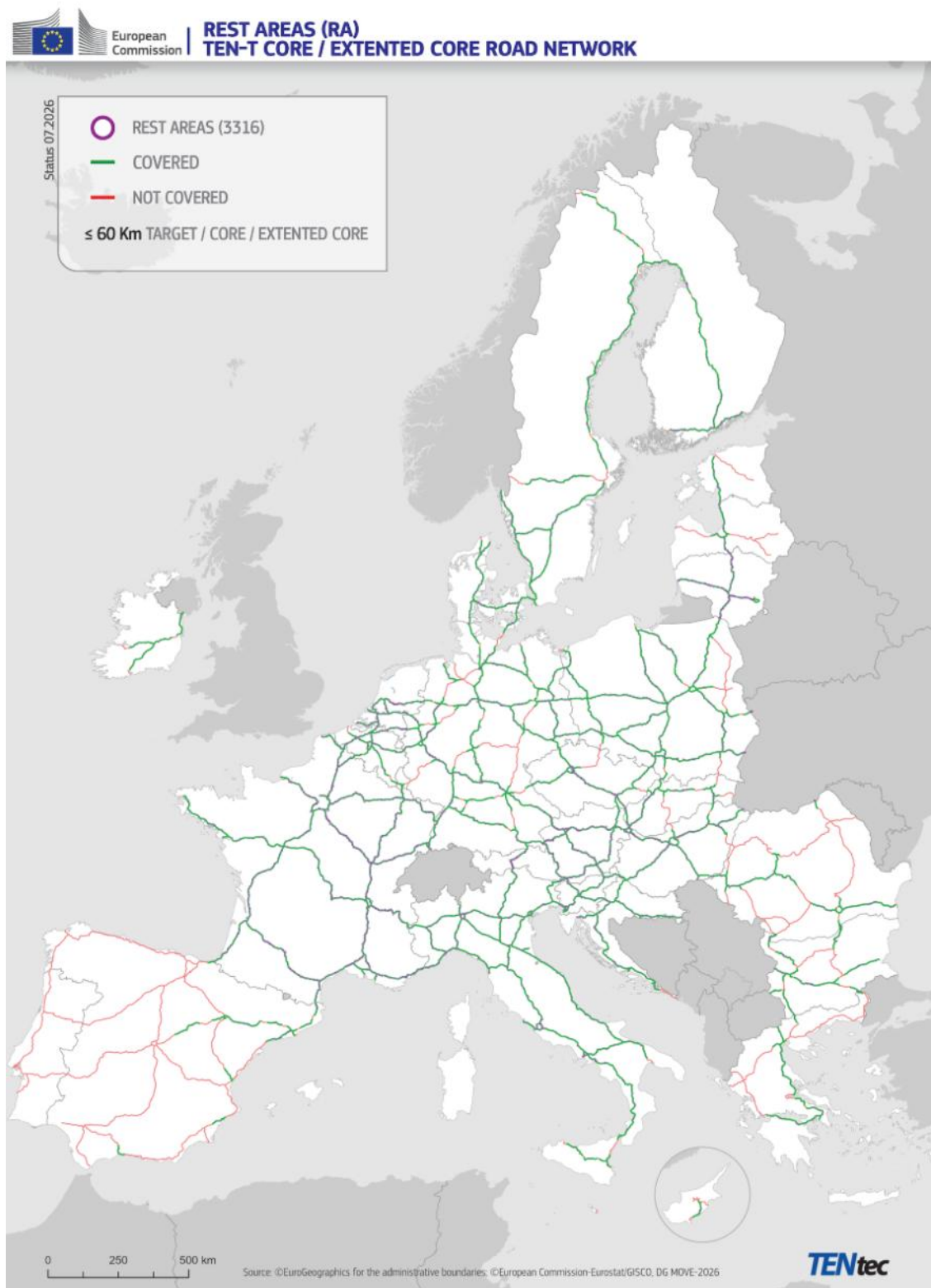
* KPI data reflect the compliance status as of 31 December 2023 and Member States' feedback on the Corridor Study Update report received by August 2025

Source: ATL consultants based on data collected from various sources and Corridor countries' Infrastructure Managers

Intelligent Transport Systems (ITS) are widely deployed across all Member States along the Corridor. Only limited sections, amounting to a few kilometres near Angers in France, currently lack full ITS coverage.

Geolocation data for **rest areas** in Portugal and Spain are not currently available in TENtec. This, however, does not imply the absence of such facilities on the network. Based on national information, the requirements introduced by Regulation (EU) 2024/1679 are already met along almost the entire Corridor. Rest areas equipped with essential services, including parking, food outlets, fuel stations and sanitary facilities, are generally provided at intervals of approximately 60 km along the Atlantic Corridor in Portugal, Spain and France.

Figure 6-8: Coverage of Rest areas in the ATL Corridor



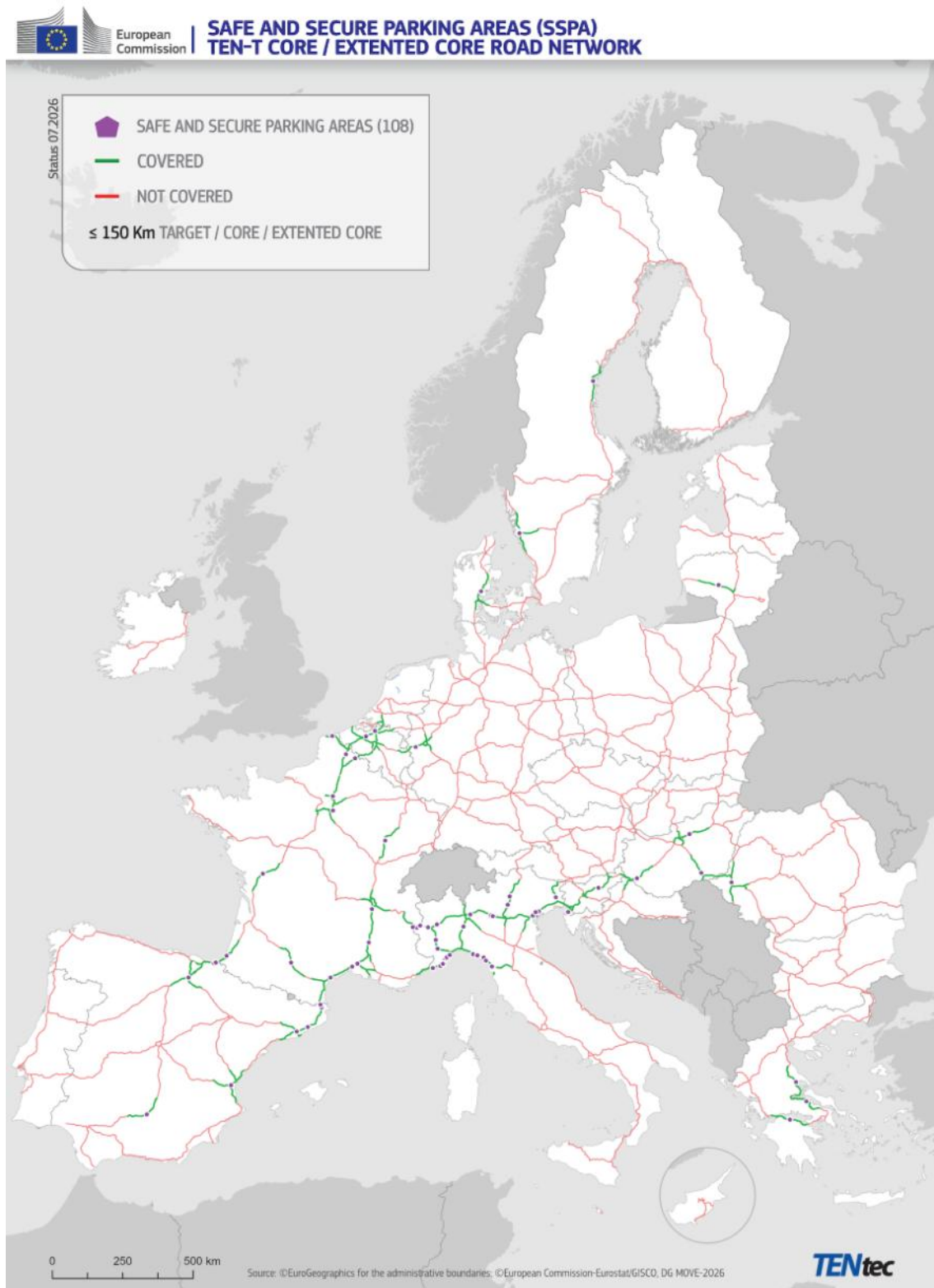
Some Corridor countries consider themselves to be fully compliant (or not in a position to verify the data) and note that the data does not fully reflect the latest state of play. For instance, in Spain, data for rest area are under validation.

Source: TENtec

By contrast, coverage of **Safe and Secure Truck Parking Area (SSTPA)** remains limited. Under the TEN-T Regulation, the development of SSTPA constitutes a KPI for the 2040 horizon, requiring the provision of certified parking areas along core and extended core network roads, or within a driving distance of 3 km from the nearest TEN-T exit, with an average maximum distance of 150 km between two such facilities. At present, only a small number of certified facilities are currently available, notably in Spain at Vitoria, San Sebastián, Astigarraga and Guarromán, and in the French region of Toulouse. Several ongoing and planned projects in Spain aim to improve the availability of safe and secure parking facilities along the Corridor. Many of them are being promoted through the PATSYD programme, funded by the Recovery and Resilience Facility, contributing to improved availability and quality of parking facilities, largely managed by the private sector.

Figure 6-9 illustrates the current distribution of Safe and Secure Truck Parking Areas on the Atlantic Corridor.

Figure 6-9: Coverage of Safe and Secure truck parking areas in the ATL Corridor



Some Corridor countries consider themselves to be fully compliant (or not in a position to verify the data) and note that the data does not fully reflect the latest state of play. ⁽³¹⁾

Source: TENtec

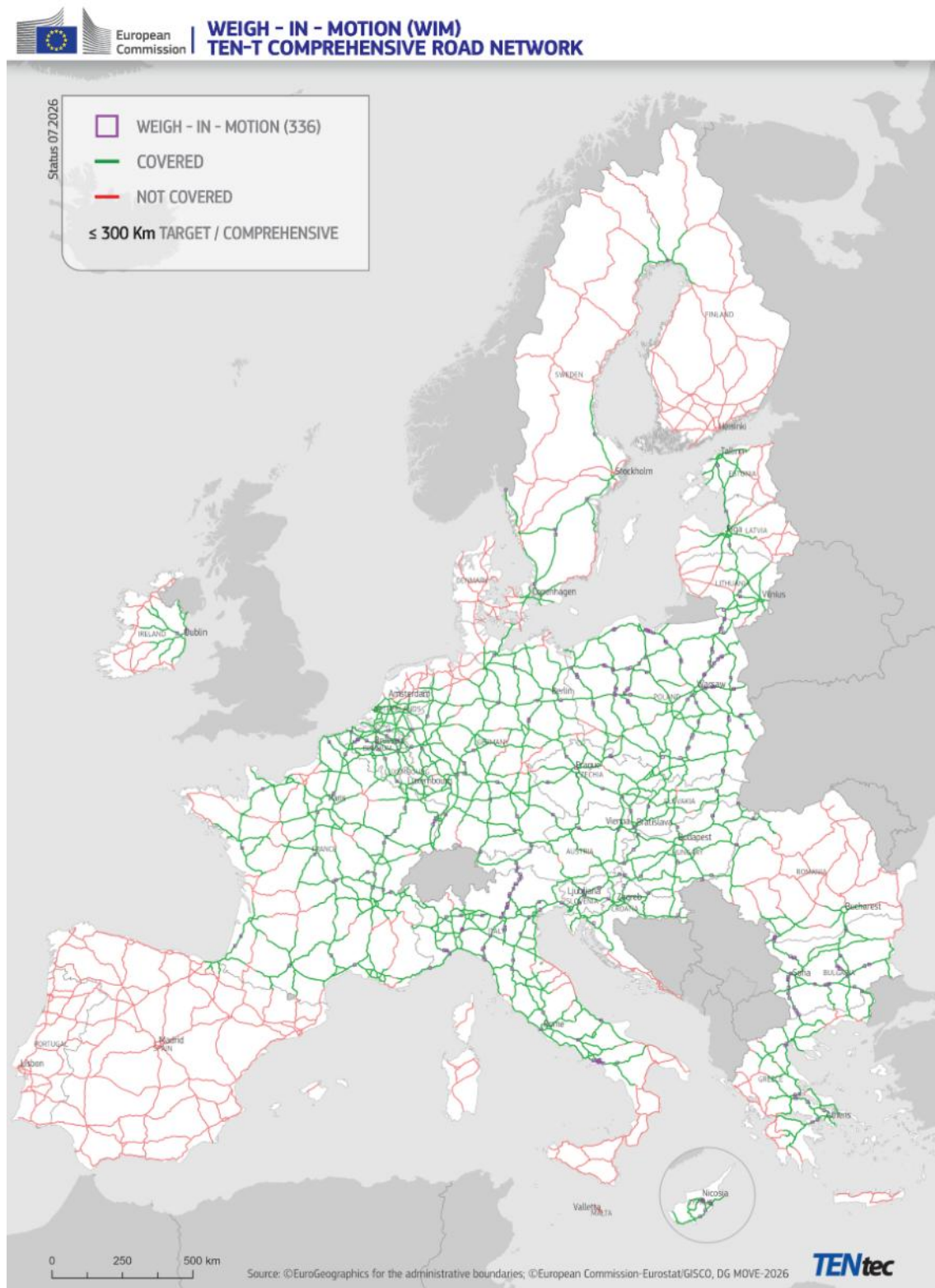
Geolocation data for **Weigh-in-Motion systems** on the road networks of Portugal and Spain are not currently available in TENtec. This does not, however, preclude the existence or operation of such systems on the network.

In Spain, the service contract for the “Adaptation, Maintenance, and Modernisation of the Traffic Counting and Sensor System on the State Road Network (RCE)” includes the deployment of dynamic weighing systems (WIM) to determine the actual weights of vehicles on selected sections. Although these systems are not intended for enforcement, the data collected will support regulatory updates, network planning, and the prioritisation of inspections for structures exposed to heavy loads. Work is currently underway to carry out an inventory of existing systems and datasets, as well as to define a proposal for the deployment of new installations.

In Portugal, Weigh-in-Motion systems are already in place at the Valença border crossing on the core network, and additional installations are planned on several other core network sections. In France, Weigh-in-Motion coverage corresponds to an average spacing of approximately 377 km on the core network and 613 km on the comprehensive network.

⁽³¹⁾ For instance, in Spain, through the RRT PATSYD programme, several SSTPs are developed in or improved in the port of Huelva (sold), Algeciras (bronze), Mérida (gold), Fontioso-Burgos (gold), Guarromán-Jaén (gold), Valdecarpinteros-Salamanca (gold), Zaragoza (gold), Zaragoza (platinum), Salamanca (gold), Vitoria (gold) and Tomelloso-Ciudad Real (gold).

Figure 6-10: Coverage of Weigh-in-motion systems in the ATL Corridor



Some Corridor countries consider themselves to be fully compliant (or not in a position to verify the data) and note that the data does not fully reflect the latest state of play.

Source: TENtec

6.6. IWW and inland port compliance status

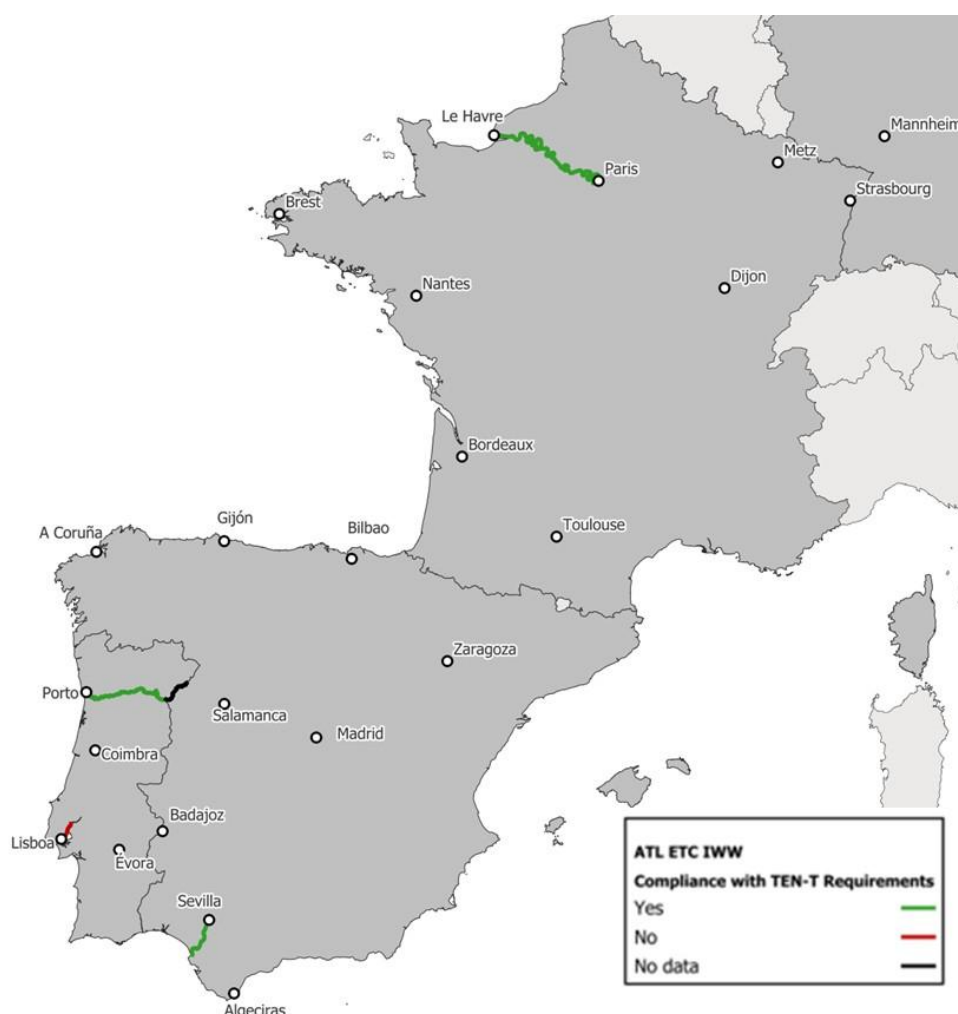
The primary inland waterways of the Atlantic European Transport Corridor are the Tagus River in Portugal, the Guadalquivir River in Spain, the Douro River in Portugal and Spain ⁽³²⁾ and the Seine River in France. These waterways provide critical connections to the hinterland and, in the case of the port of Seville, constitute the navigable access route from the open sea.

The European Commission is currently preparing implementing decisions to establish reference water levels for each TEN-T inland waterway. These decisions will improve predictability and support safe and efficient navigation, while recognising that free-flowing river sections may be affected by climatic and weather-related variability. The implementing decisions are being developed in close cooperation with Member States and nominated national experts, with adoption foreseen in 2026. Until these decisions are adopted, full compliance with reference water level requirements cannot be conclusively assessed.

With the exception of the Tagus River, all inland waterways along the Atlantic Corridor are equipped with **RIS**, resulting in an overall compliance rate of 95% for this requirement. For other parameters, the Corridor is fully compliant. The remaining non-compliant sections correspond to a limited number of bottlenecks along the Tagus River between Lisbon and Castanheira do Ribatejo, for which remedial measures are planned. Figure 6-11 presents the compliance status of the inland waterway network of the Atlantic Corridor.

⁽³²⁾ However, the international section of the Douro between Portugal and Spain is not navigable due to the presence of several hydroelectric dams

Figure 6-11: IWW on the Atlantic Corridor: compliance with selected requirements



Source: ATL Consultants

The methodology for the assessment of the handling in ports is described in chapter 3.1.5. This chapter therefore provides a view on the inland ports regarding the TEN-T requirements.

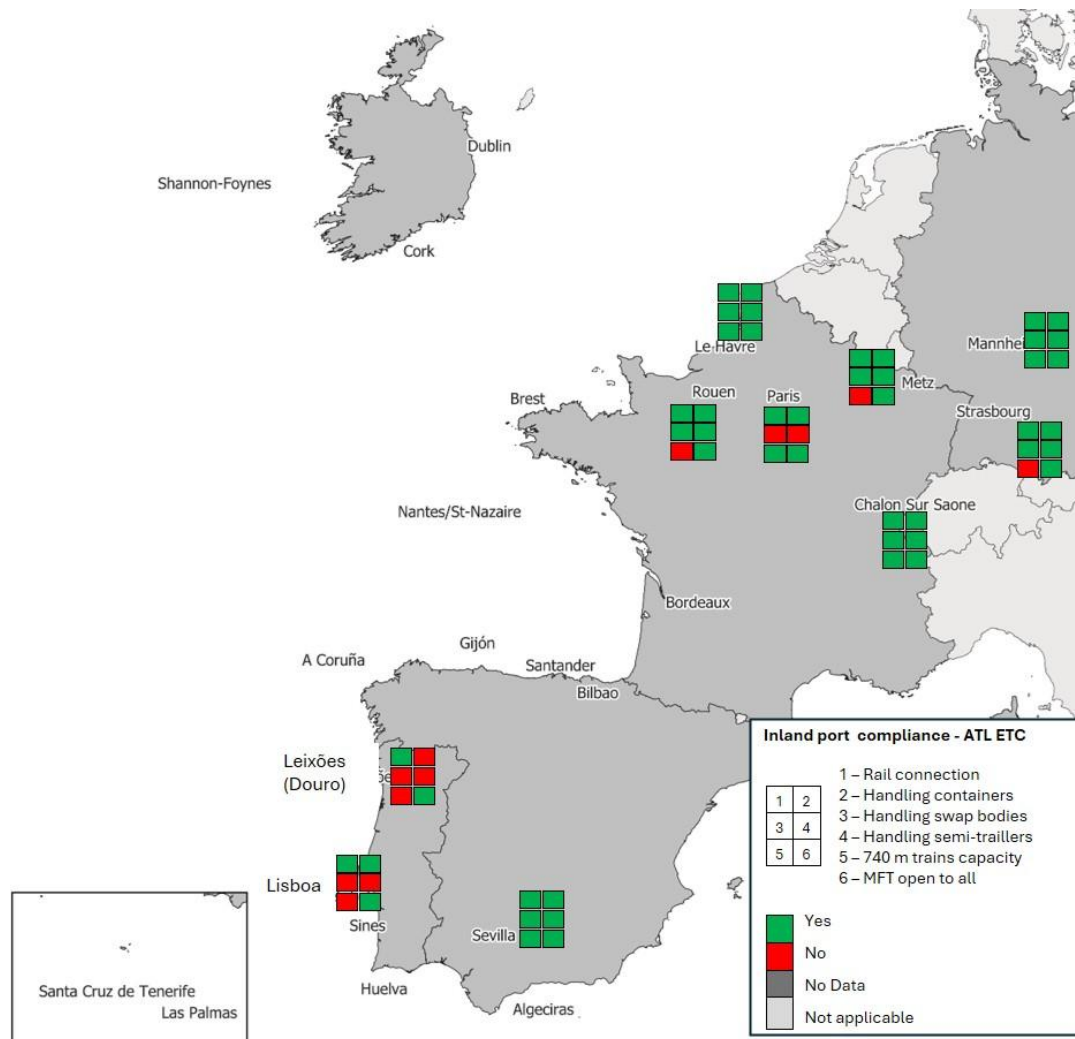
Compliance with **inland port requirements** along the Atlantic Corridor is strong with respect to rail connectivity, the availability of multimodal freight terminals open to users in a non-discriminatory manner and the capacity for handling containers, for which all ports are compliant.

Capacity for **handling of swap bodies and semi-trailers** is not available in the two Portuguese ports as well as in the Paris ports. Moreover, neither of the two Portuguese ports nor Rouen and Strasbourg currently meet the requirement for a **minimum of one transshipment track with a usable length of at least 740 m**.

The ports of Le Havre, Rouen, Lisbon and Sevilla are **connected to inland waterways**. Regular inland waterway transport of goods is currently carried out at Le Havre and Rouen. On the Tagus River, fluvial transport of goods, notably

cereals, has been in operation for decades. Inland navigation is expected to be significantly enhanced for containerised traffic following the implementation of the project to improve navigability on the Tagus River up to Castanheira do Ribatejo. The port of Leixões is located approximately 5 km from the mouth of the Douro River. However, the establishment of a navigable connection between the port and the river is currently considered out of scope. Figure 6-12 presents the results of the ATL inland ports' compliance analysis.

Figure 6-12: ATL Inland ports compliance status, 12/2023*



Source: ATL consultants based on data collected from various sources and countries' Infrastructure Managers

* KPI data reflect the compliance status as of 31 December 2023 and Member States' feedback on the Corridor Study Update report received by August 2025

6.7. Seaport and EMS compliance status

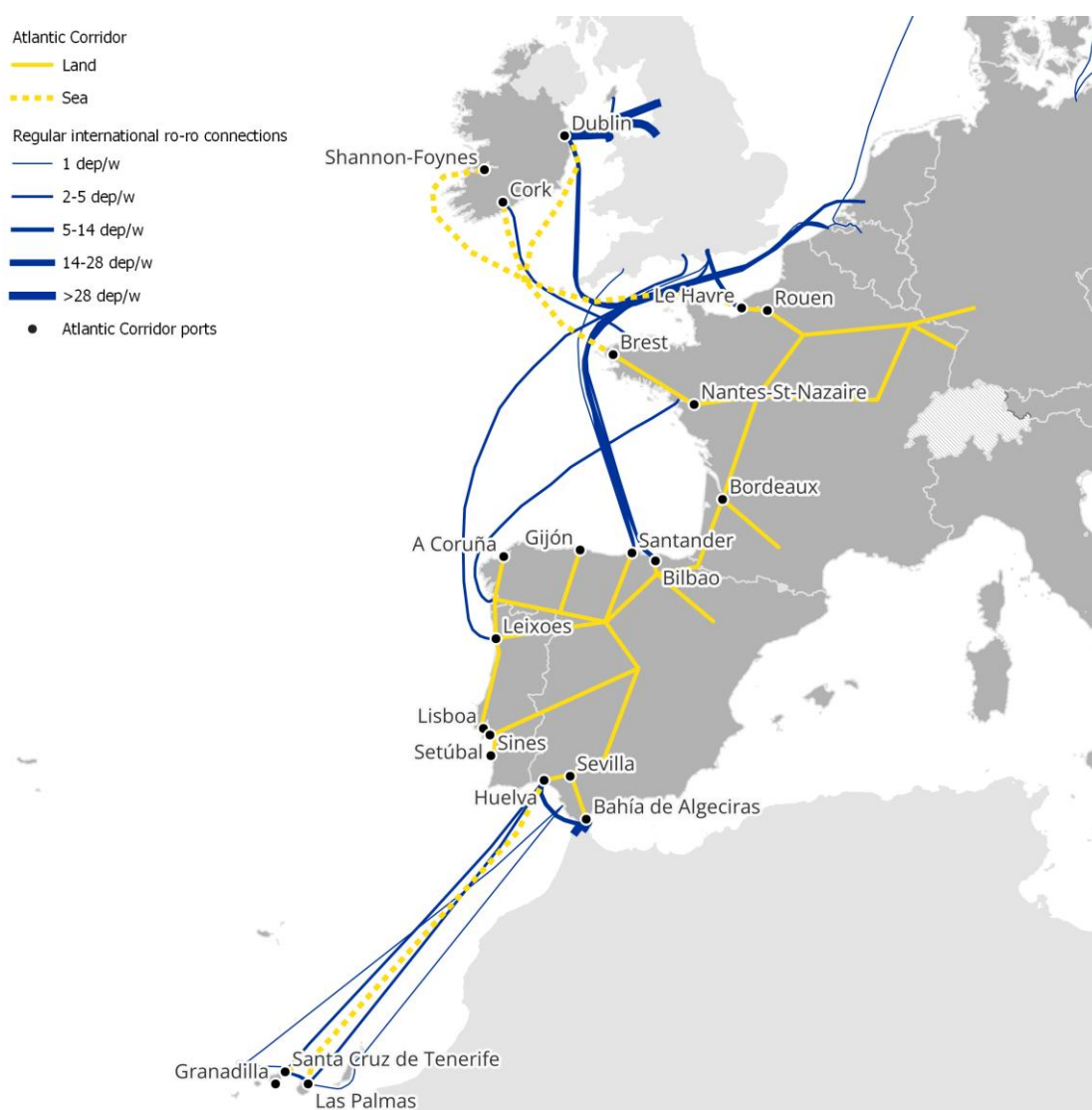
The **European Maritime Space (EMS)** – i.e. the maritime infrastructure, the ports and its users – connects EU countries with each other and the rest of

the world. Hence, it plays an important role for the EU's economic development and resilience.

6.7.1. Atlantic Corridor and European Maritime Space

The Atlantic Corridor includes 20 **maritime ports** (Figure 6-13): three in Ireland, five in France, nine in Spain and three in Portugal. It includes maritime connections between Ireland and France, as well as between the Spanish mainland and the Canary Islands.

Figure 6-13: Maritime Ports on the Atlantic Corridor and selected ro-ro routes



Source: Institute of Shipping Economics and Logistics

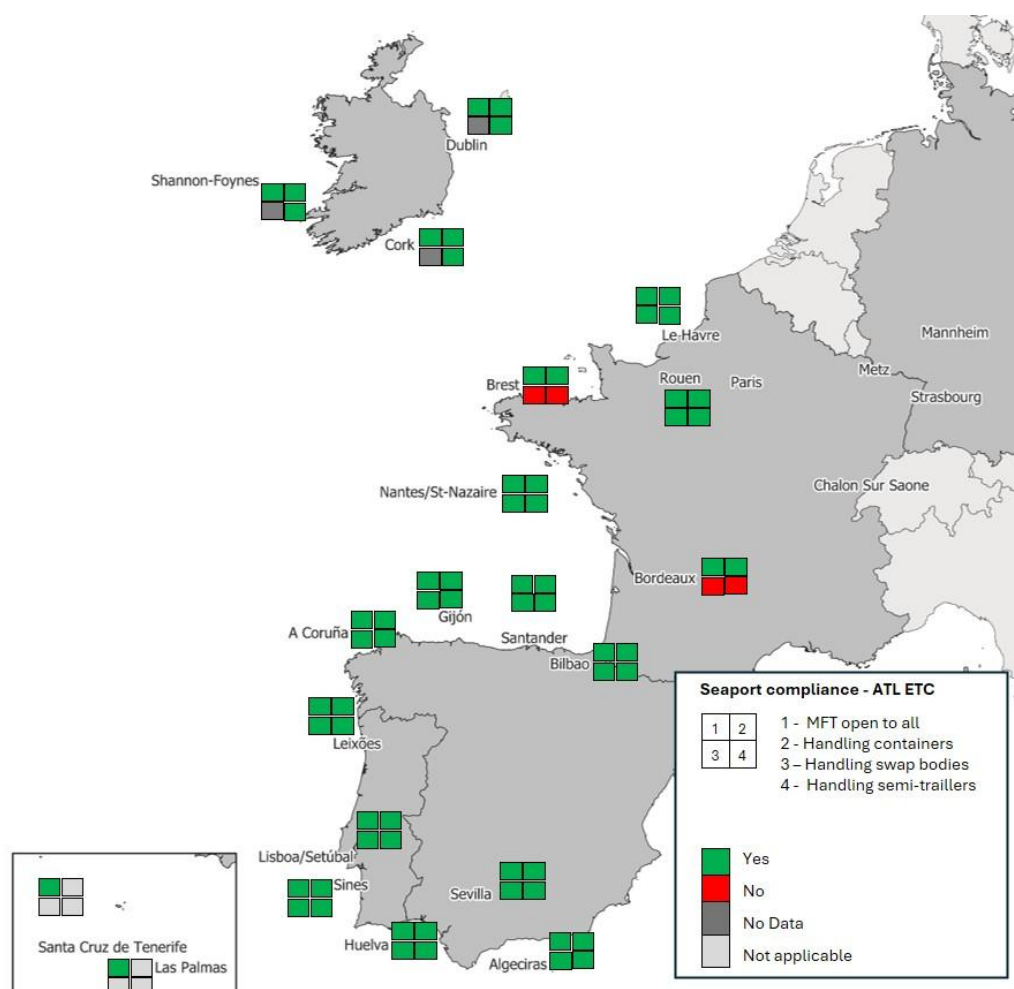
Note: Ro-ro routes include only international connections and connections with outermost regions.

6.7.2. Ports' compliance with TEN-T requirements

The methodology for the assessment of the handling in ports is described in chapter 3.1.5. This chapter therefore provides a view on the maritime ports regarding the TEN-T requirements.

All maritime ports along the Atlantic Corridor are compliant with the requirement to provide **at least one Multimodal Freight Terminal open to all users** on a non-discriminatory basis. **Capacity to handle intermodal loading units** is fully achieved for containers. By contrast, and despite a deadline due by 2040, **handling of semi-trailers** is not possible in Brest, but expected by 2027 in Bordeaux. **Handling of swap bodies** is not possible in Bordeaux while for Irish ports data is not available for this parameter.

Figure 6-14: Maritime Ports on the Atlantic Corridor: compliance with selected requirements (ETC)



Source: ATL Consultants

Additional requirements applicable to core ports under the TEN-T Regulation fall within the scope of the **European Maritime Space** study and are summarised in Table 6-2.

Table 6-2: TEN-T requirements by infrastructure type

Maritime infrastructure	Multimodal terminals	Hinterland connections
Good navigational status	740m trains	Road, rail and IWW
Onshore power supply	Vertical handling	of Rail gauge 1 435mm for new
LNG bunkering	container, trailers and swaplines	
	bodies	Rail electrification
		22.5t axle load

Source: Institute of Shipping Economics and Logistics based on TEN-T Regulation

Maritime infrastructure requirements

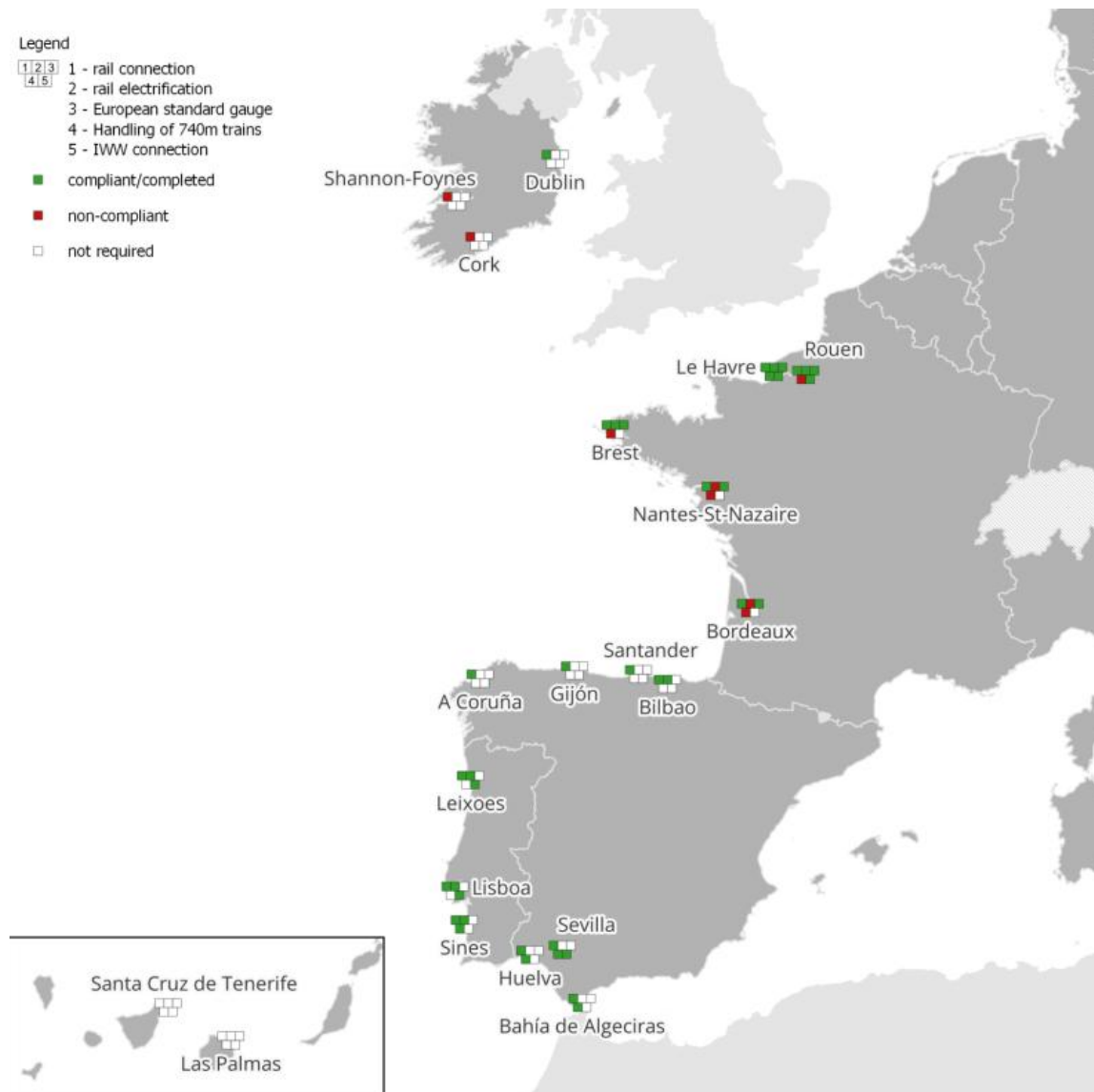
The navigability requirements laid down in the TEN-T Regulation do not constitute a constraint for EU core seaports along the Atlantic Corridor. In particular, all maritime ports on the Corridor comply with the minimum navigable depth of 2.5 m and the minimum vertical clearance of 5.25 m under non-openable bridges, as defined in Article 26(2)(c) in conjunction with Article 23(3)(a). Beyond these parameters, the Regulation does not set specific requirements regarding quay length or maximum vessel draught, recognising that vessel types and dimensions vary according to cargo characteristics and trade routes.

Terminal infrastructure requirements

The requirements relevant for seaports apply specifically to terminals connected to the rail network. At least one terminal within the port, or a combination of terminals, must be capable of accommodating trains of up to 740 m in length.

As of late 2025, only the ports of Le Havre, Sines, Huelva, Seville and Algeciras were able to accommodate 740 m long trains without manipulation within a maritime terminal. As illustrated in Figure 6-15, most other ports along the Atlantic Corridor currently do not allow for this condition within their maritime terminals, mainly due to terminal layout constraints and insufficient track lengths. Nevertheless, the TEN-T Regulation allows for shunting operations where the construction of 740 m tracks in terminals is not economically viable.

Figure 6-15: Maritime Ports on the Atlantic Corridor: compliance with selected requirements (EMS)



Source: Institute of Shipping Economics and Logistics

Hinterland connections

The TEN-T Regulation defines several **requirements relating to port hinterland connections**. For maritime ports, these include:

- connection to the road network and, where available, to the rail and inland waterway networks
- for ports with rail connections, compliance with technical requirements on electrification of access tracks, a minimum axle load of 22.5 tonnes.

All maritime ports along the Atlantic Corridor are connected to the road network, and 16 ports also have a rail connection ⁽³³⁾.

Isolated networks as defined by the TEN-T Regulation are exempted from the requirement concerning the electrification. However, considering the efforts made by Ireland, Spain and Portugal to implement European interoperability standards, the map below provides a technical status of the situation of their ports. In France, three ports have maritime terminals that are directly connected or that have an electrified rail line within 1 km. Table 6-3 provides an overview of rail electrification at maritime ports along the Atlantic Corridor as of the end of 2024.

Table 6-3: Maritime Ports on the Atlantic Corridor: rail electrification by end of 2024

Member state	Number of concerned ports	Access route electrified up to terminal	Distance of maritime terminal to electrified rail network		
			<=1000m	<=5000m	<=10000m
Ireland	0	-	-	-	-
France	5	40%	80%	100%	100%
Spain*	0	-	-	-	-
Portugal	0	-	-	-	-
Concerned ports	5	40%	80%	100%	100%

* Only required for ports that are connected to UIC gauge.

Source: Institute of Shipping Economics and Logistics

Le Havre, Rouen, Lisbon and Sevilla are connected to inland waterways, though it is only used in the first two ports for regular goods transport by inland waterway vessels.

Other requirements for ports

Other referenced legislative frameworks include the requirement for ports to ensure the availability of port reception facilities in line with Directive (EU) 2019/883, the obligation for Member States to implement the Vessel Traffic Monitoring and Information System (VTMIS) Directive and for that purpose the Union Maritime Information and Exchange System (SafeSeaNet) in accordance with Directive 2002/59/EC, and to implement Maritime National Single Windows in accordance with Regulation (EU) 2019/1239, which establishes the European Maritime Single Window environment (EMSWe) and is applicable since 15 August 2025. Given the dedicated EU governance and monitoring arrangements for these frameworks, the Work Plan recognises them as key enablers of safety, interoperability and resilience, without providing a detailed assessment of implementation.

⁽³³⁾ The two island ports of the Canary Islands (Tenerife and Gran Canaria) are exempted for rail connections. There is no rail connection to the Irish port of Cork and the rail connection to the port of Shannon Foynes needs to be reactivated. The reactivation works are ongoing and are expected to be completed by October 2026.

6.8. Airport compliance status

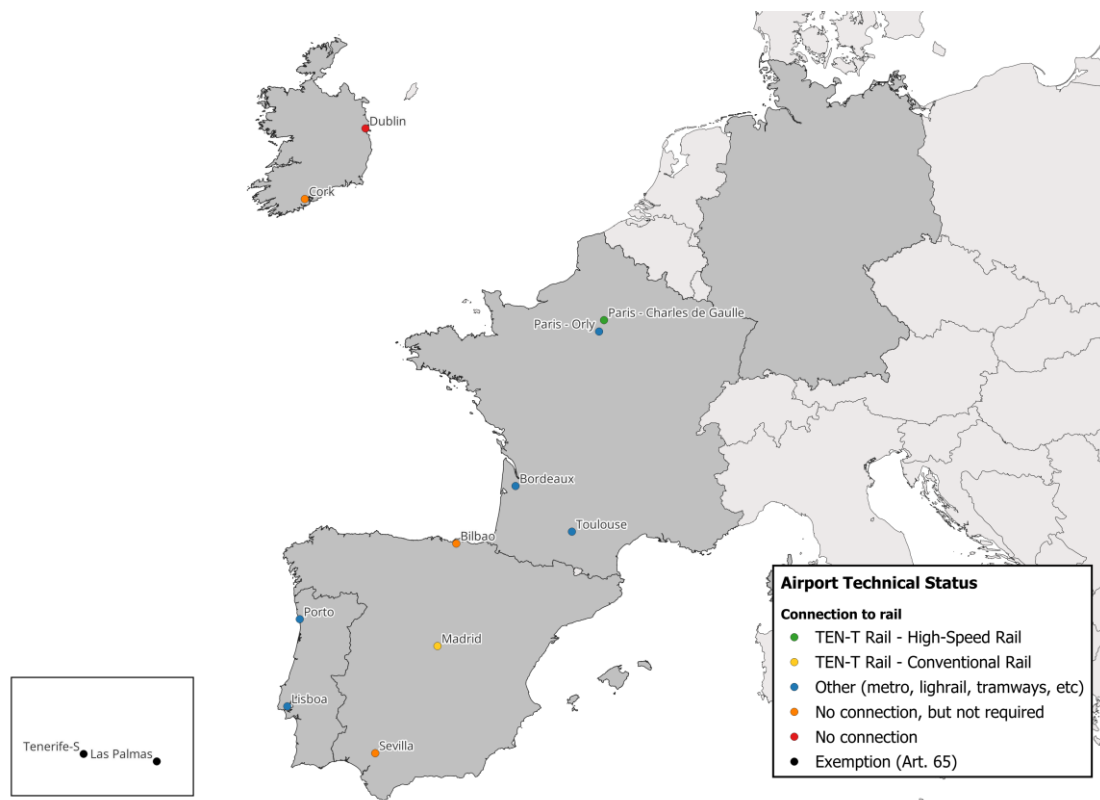
The Atlantic Corridor includes 13 airports. Las Palmas and Tenerife are located on islands without railway infrastructure and are therefore exempt from the rail connectivity requirement under Article 65 of the TEN-T Regulation. The results of the airport compliance assessment are presented in Figure 6-16.

Among the six airports where rail connectivity is required — Paris Charles de Gaulle, Madrid Barajas, Paris Orly, Lisbon, Dublin and Porto — only Paris Charles de Gaulle is currently connected to the high-speed rail network. Madrid Barajas is connected to metro and commuter heavy-rail services, while a project to establish a high-speed rail connection is under development. Lisbon, Porto and Paris Orly are served by metro-based systems or automated people movers, while Dublin Airport currently has no rail connection.

With regard to freight facilities, Cork Airport does not currently provide a multimodal freight terminal.

In terms of pre-conditioned air supply, the requirement is currently met at, Tenerife, Bilbao, Sevilla, Las Palmas and Madrid Barajas. Partial deployment exists at Paris Charles de Gaulle, Paris Orly, Lisbon and Porto, where installations are available only at some stands and therefore do not yet fully comply with the Regulation. Core network airports handling more than 4 million passengers have until 31 December 2030 to comply with this requirement. The remaining airports along the Atlantic Corridor do not currently provide these facilities.

Figure 6-16: ATL ETC Airport compliance status in terms of connectivity to rail

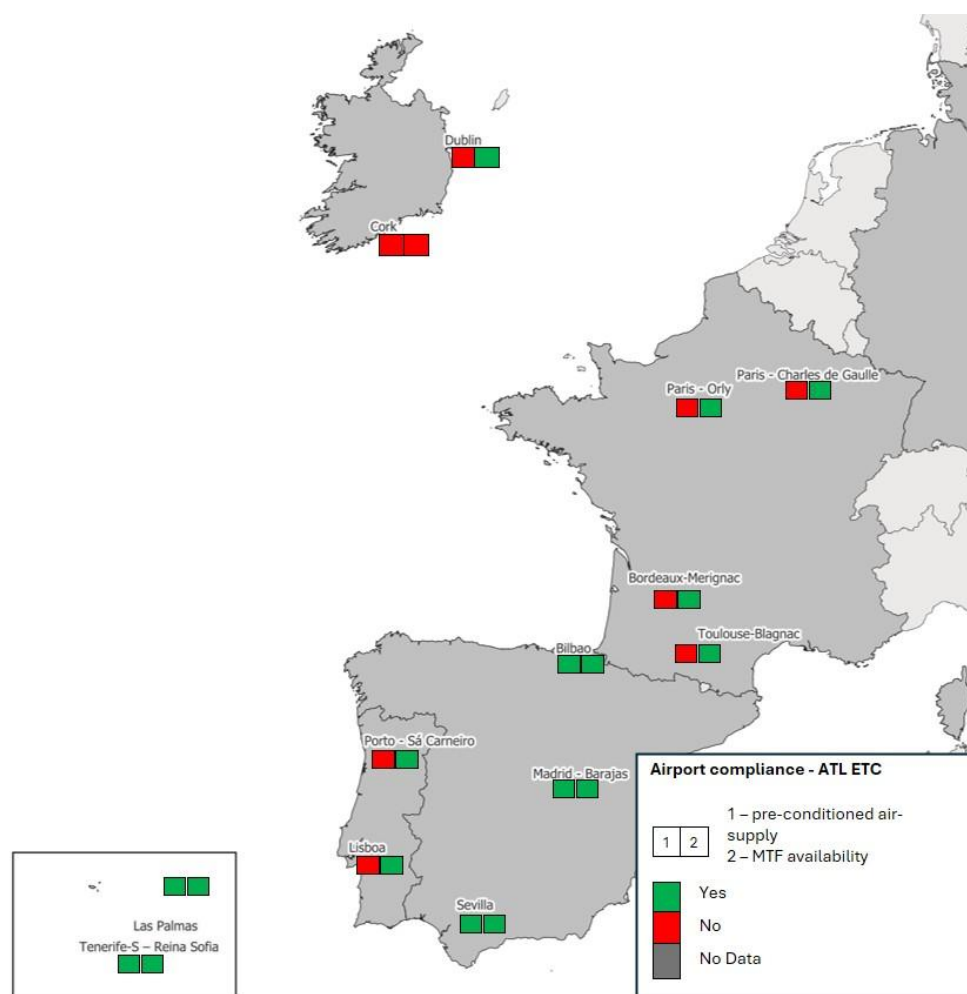


* KPI data reflect the compliance status as of 31 December 2023 and Corridor countries' feedback on the Corridor Study Update report received by August 2025

**Other: metro, light rail, tramways, cable car or, exceptionally, other zero emission public transport solutions

Source: ATL Consultants based on data collected from various sources and Corridor countries' Infrastructure Managers

Figure 6-17: ATL ETC Airport compliance status in terms of pre-conditioned air supply and MFT availability



* KPI data reflect the compliance status as of 31 December 2023 and Corridor countries' feedback on the Corridor Study Update report received by August 2025

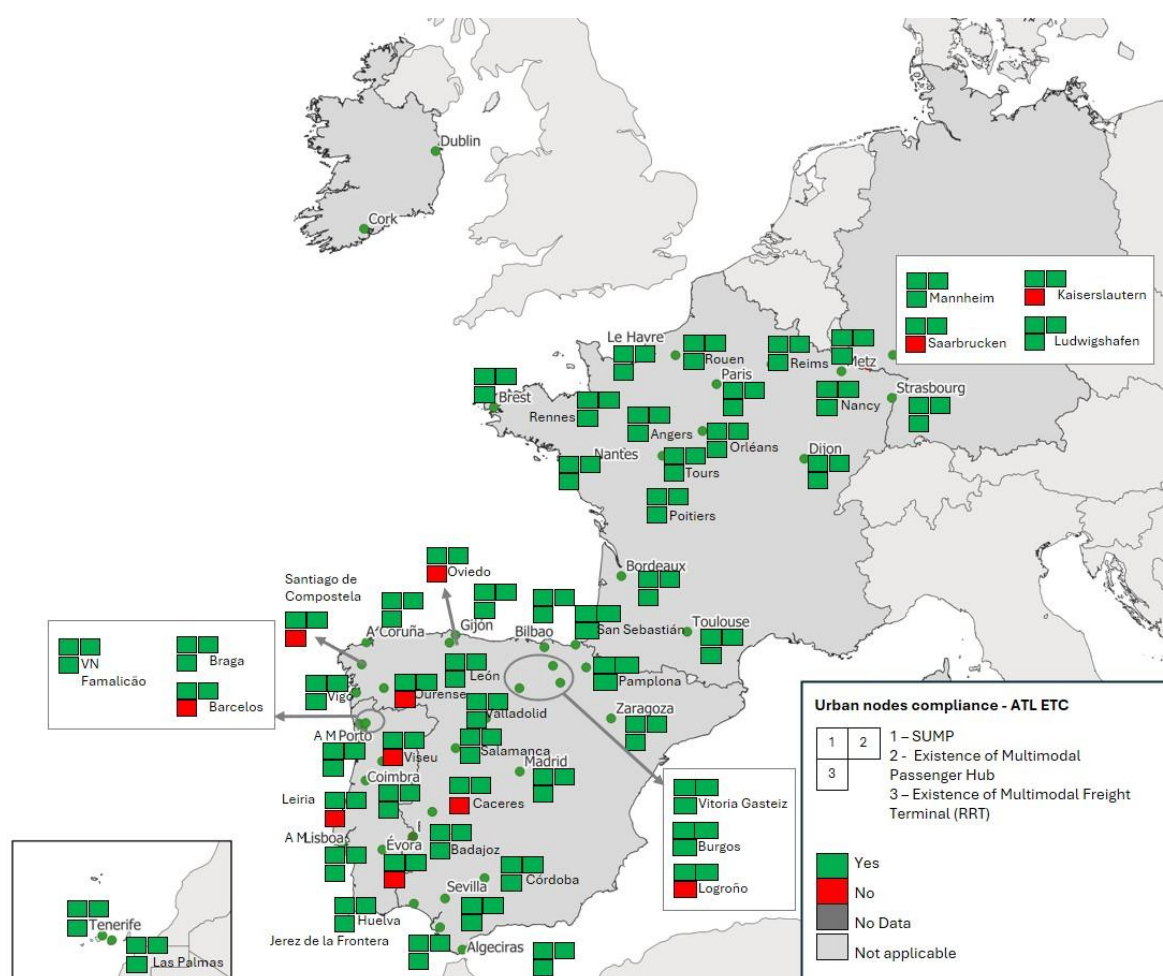
Source: ATL Consultants, based on data collected from various sources and Corridor countries' Infrastructure Managers

6.9. Urban node compliance status

The Atlantic Corridor includes 58 urban nodes. All Member States have designated a national contact point for Sustainable Urban Mobility Plans (SUMP) and have established a national SUMP programme ⁽³⁴⁾. At local level, 58 urban nodes are currently covered by a SUMP. The status of SUMP varies across the corridor and its revision and update in line Annex V is planned in several urban nodes.

⁽³⁴⁾ Across the corridor we could identify SUMP that have been developed at municipal level, metropolitan and regional levels.

Figure 6-18: ATL ETC urban node indicative provisional technical status



Source: ATL Consultants

Note: Prospective analysis on multimodal freight terminals in accordance with Article 36 (3) of the TEN-T Regulation is still in progress with deadline July 2027. The assessment herewith conducted refers to the RRT and ports as in Annex 2 of TEN-T Regulation and should be considered as a preliminary assessment ⁽³⁵⁾.

Along the Atlantic Corridor 81 **multimodal passenger hubs (MPHs)**, of which two are airports and 79 are rail and coach terminals, distributed across its 58 urban nodes were identified. This means that each urban node is served by at least one **multimodal passenger hub facilitating first and last-mile connectivity**, including access to public transport infrastructure and active

⁽³⁵⁾ It was agreed to consider “*cours de marchandises*” as a possible MFT in Urban Node. In France, this enables wagons to be loaded and unloaded and goods to be transferred from railway to other transport modes and vice versa. They consist of one or more service tracks, possibly with sheds, platforms or buildings and road access for lorries. This seems to comply with the definition of a MFT, namely “a structure equipped for transshipment between at least two transport modes, or between two different rail systems, and for temporary storage of freight, such as terminals in inland or maritime ports, along inland waterways and in airports, as well as rail-road terminals”.

mobility, and ensuring connection to long-distance transport modes. In several urban nodes, more than one MPH has been identified.

Connectivity to long-distance transport is ensured through different configurations. A total of 28 MPHs are rail-based, 34 hubs provide connectivity through both rail and coach services and 16 hubs rely exclusively on coach services. This underlines the significant role played by coach terminals in several urban nodes along the Corridor that are not directly served by rail. First and last-mile connectivity is generally well addressed, including the provision of active mobility access and integrated parking facilities supporting long-distance travel.

Of the 81 multimodal passenger hubs, 34 offer **fully integrated infrastructure**, where all transport modes are served within a single facility. In 59 hubs, services and platforms are distributed across multiple floor levels. While accessibility standards are generally strong, improvements are still required at some coach terminals in Portugal, notably with regard to facilities for persons with reduced mobility.

7. Annex 3: Projects planned until 2030/2040

7.1. Overview

The Project List constitutes the official inventory of infrastructure projects relevant to the Atlantic European Transport Corridor. It includes both projects under implementation and those at earlier stages of preparation, including planning and design. The Project List serves a dual purpose: it provides a structured blueprint for delivering the Corridor in line with the TEN-T milestone deadlines and acts as a monitoring instrument to assess expected progress based on project maturity, delivery schedules and contribution to Corridor objectives.

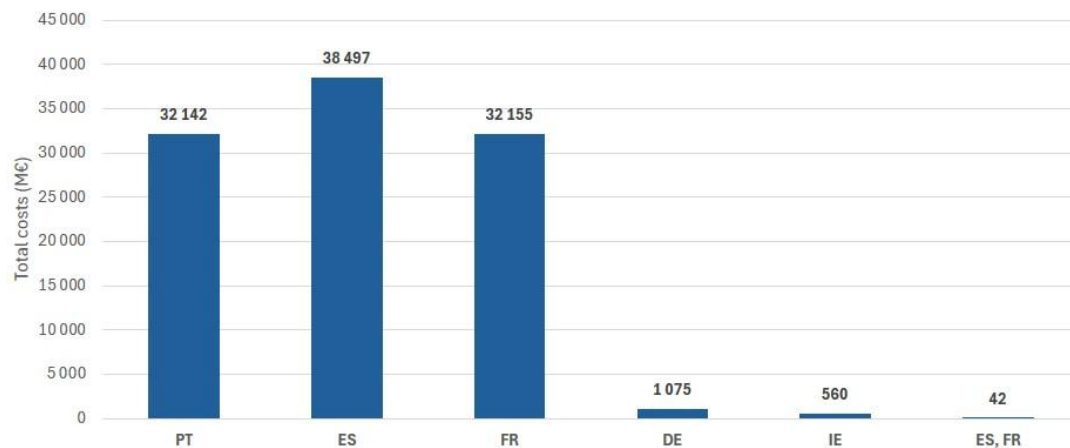
Building on the work carried out in previous phases of the Corridor studies, the Atlantic ETC Project List has been continuously updated and reviewed in close cooperation with Corridor stakeholders, including Member States and infrastructure managers. As established under the TEN-T Regulation, the current Project List comprises a total of **104.5 billion euros** across the participating Member States, reflecting the scope and ambition of the Corridor across both the core and extended core networks.

In terms of the distribution of **project costs across Member States**, the highest costs refer to projects in Spain, Portugal and France ⁽³⁶⁾. Spain represents the largest sum, with projects amounting to **38.5 billion euros**, followed by France, whereby projects amount to **32.15 billion euros** ⁽³⁷⁾ and Portugal with **32.14 billion euros**. Figure 7-1 presents the costs of projects in the Atlantic ETC per Member State.

⁽³⁶⁾ It should be noted that Germany only represents a small share of the Corridor's extension. For Ireland, only seaports and urban nodes are part of the Atlantic Corridor, with all road and rail alignments being part only of the North Sea Rhine Mediterranean Corridor.

⁽³⁷⁾ This figure does not include the updated costs of phase 2 of LNSO project.

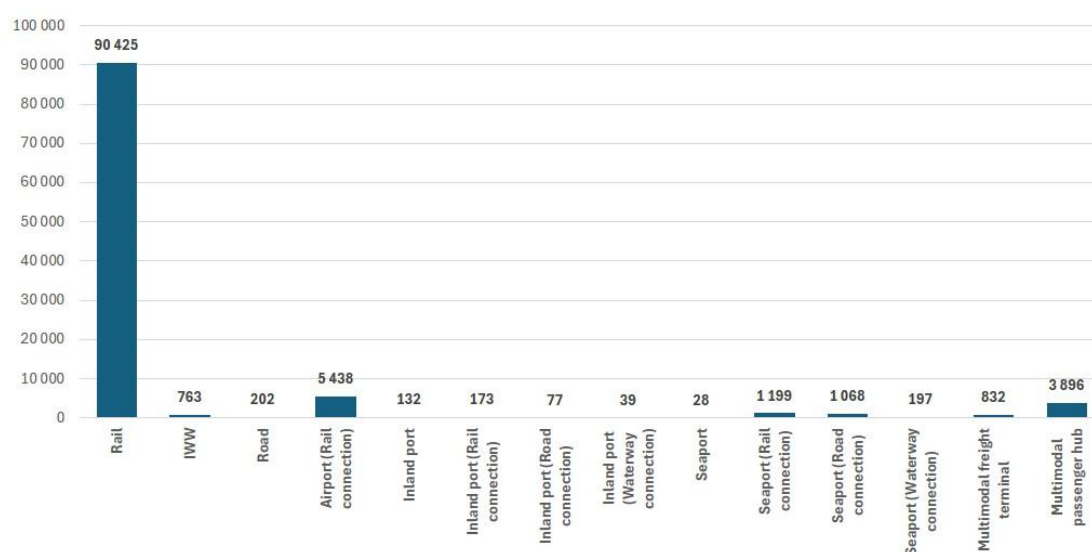
Figure 7-1: Total costs of projects in the ATL per Member State (million euros)



Source: Project List 2026, updated June 2026

When considering the cost of projects in the Atlantic ETC per mode, as anticipated, **rail-related projects** account for the highest costs, at **90.4 billion euros**. Subsequently, projects concerning Corridor connections to airports amount to **5.44 billion euros**, followed by projects concerning Multimodal Passenger Hubs (3.9 billion euros) and Corridor connections to seaports (2.5 billion euros). Figure 7-2 provides the cost of projects in the Atlantic ETC per transport mode.

Figure 7-2: Total costs of projects in the ATL by mode (million euros)



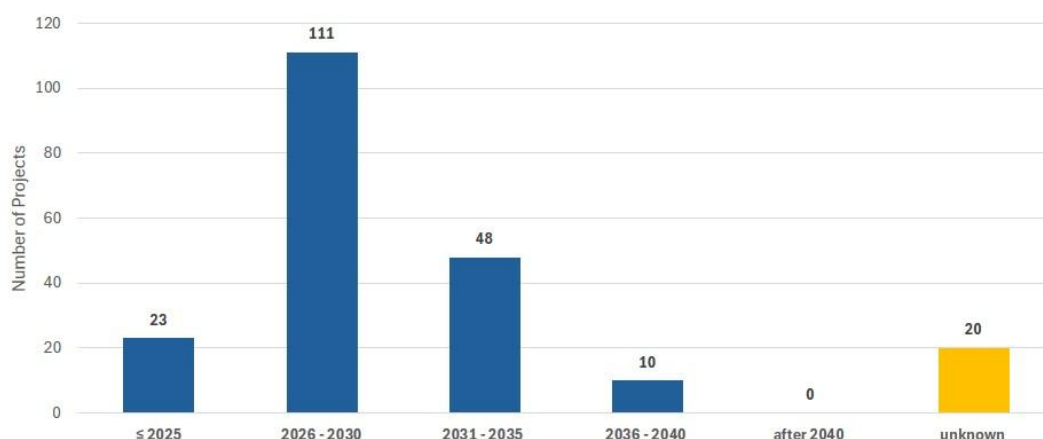
Source: Project List 2026, updated June 2026

Figure 7-3 presents the **distribution of projects by completion time clusters**. Around 65% of the Atlantic European Transport Corridor project portfolio is currently aligned with the TEN-T milestone deadlines, with 134 projects scheduled for completion by 2030, reflecting the priority given to delivering the core network within the required timeframe.

A further 48 projects (23%) are expected to be completed between 2031 and 2035, including several major infrastructure works whose completion has shifted to 2032-2034, as well as projects belonging to the extended core network.

Beyond this horizon, ten projects are planned for completion by 2040. In addition, 20 projects (9%) currently have no confirmed completion date, includes several critical missing links that will require further planning and investment commitments to ensure full Corridor continuity.

Figure 7-3: Total number of projects in the ATL by completion time cluster



Source: Project List 2026, updated June 2026

As previously mentioned, key projects include investments in railway infrastructure, namely for the LNSO (France), the high-speed railway connections in the Y Basque (Spain), the Porto-Vigo high-speed line (Portugal and Spain), Lisbon-Porto (Portugal) and Lisbon-Madrid, among others.

7.2. Rail transport

Rail transport represents the core investment priority of the Atlantic European Transport Corridor, with a total investment of approximately **EUR 90.4 billion**, corresponding to around 87% of the overall Corridor project portfolio.

The rail investment portfolio can broadly be grouped into three main categories: new high-speed rail infrastructure, projects contributing to TEN-T KPI compliance, and capacity expansion projects.

7.2.1. High-speed rail infrastructure:

The largest share of investment is directed towards the construction of new high-speed rail (HSR) infrastructure, representing **approximately EUR 78 billion** of the Corridor's rail investment.

The development of the Atlantic Corridor high-speed network relies on several large infrastructure programmes across Portugal, Spain and France. Among them, the following are of particular relevance:

- the Lisbon–Madrid high-speed connection, a flagship cross-border project subject to a Commission Implementing Decision establishing milestones for its progressive completion
- the Y Basque high-speed network in northern Spain, including its future connection to the French network
- the LNSO in France, extending the high-speed network between Bordeaux, Toulouse and Dax and improving connectivity between the Iberian Peninsula and the French high-speed system.
- the Lisbon–Porto high-speed line, which will form the backbone of the Portuguese high-speed network

HSR Projects expected to be completed by 2030–2032

Several priority high-speed rail investments are expected to be delivered during the early phase of Corridor implementation representing initial milestones towards a continuous high-speed connectivity across the Iberian Peninsula.

These include:

Portugal

- **Porto–Soure, Phase 1 of the Lisbon–Porto HSL** in 2032 (EUR 4.6 billion)
- **Soure–Carregado, Phase 2 of the Lisbon–Porto HSL** in 2032 (EUR 3.0 billion)

Spain

- **Toledo–Talayuela - Plasencia** (EUR 1.6 billion), part of the **Lisbon–Madrid HSL**
- **Y Basque high-speed network**, including Vitoria-Bilbao-San Sebastián and Astigarraga-Irún (EUR 5.9 billion)
- **Burgos–Vitoria HSL** (EUR 1.8 billion)
- **Venta de Baños–León–Pola de Lena HSL** (EUR 1.4 billion)
- **Taboadela–Seixalbo**, new HSL access to Ourense (EUR 214 million)
- **Palencia–Alar del Rey**, part of the high-speed line Palencia-Reinosa (EUR 900 million)
- **Vigo southern access**, part of the Porto–Vigo HSL by 2032 (EUR 686 million)
- **Castejón - Pamplona**, part of Zaragoza – Pamplona - Y Basque HSL (EUR 892 million).

HSR projects expected to be completed between 2033 and 2035

A second phase of major high-speed rail investments is expected between 2033 and 2035, corresponding to the completion of several key sections of the core network.

Portugal

- **Lisbon-Évora Norte**, including the third Tagus crossing, forming part of the **Lisbon-Madrid HSL** (EUR 6.9 billion)
- **Braga-Valença** (EUR 3.4 billion)
- **Porto Campanhã-Porto Airport**, first phase of the **Porto-Vigo HSL** (EUR 1.6 billion)

Spain

- **Zaragoza-Castejón**, part of the **Zaragoza-Pamplona-Y Basque HSL** (EUR 1.4 billion)
- **Pamplona-Vitoria**, part of the **Zaragoza-Pamplona-Y Basque HSL** (EUR 1.6-2.8 billion) ⁽³⁸⁾
- **Galicia HSL**, complementary works between Zamora, Lubián and Taboada (EUR 3.7 billion)

France

- **LNSO Phase 1 (at least EUR 14 bn):**
 - Step 1:**
 - **Bordeaux - Sud Gironde HSL**
 - **Sud Gironde - Toulouse HSL**
 - Step 2:**
 - **Sud-Gironde - Dax HSL**

With the operations at the South of Bordeaux et at the North of Toulouse, underway, these LNSO sections of the Phase 1 represent a combined investment of at least EUR 14 billion. The schedule will be specified in the forthcoming multi-annual programme law on investment in transport infrastructure in France.

Cross-border Portugal-Spain

- **Caia-Badajoz**

⁽³⁸⁾ Investment costs will be defined based on the outcome of the study identifying the most suitable connection with the HSL Vitoria-Bilbao / San Sebastián

Although this project is not foreseen in the current ATL Project List, it is part of the Implementing Decision Lisboa-Madrid. It is subject to the results of the studies commissioned by AVEP, depending on the confirmation of its justification.

HSR projects expected to be completed beyond 2035

Beyond 2035, a limited number of high-value projects remain under development.

These include:

Portugal

- **Carregado – Oriente**, corresponding to the final phase of the **Lisbon-Porto** HSL (EUR 2 billion)
- **Porto Airport-Braga** (EUR 600 million)
- **Aveiro-Mangualde** (EUR 600 million) **and Mangualde-Vilar Formoso** (EUR 600 million) towards Salamanca

Spain

- **Bilbao Abando** station and access lines (Cota 15 project) (EUR 1.5 billion), currently planned for completion by 2040

France

- **LNSO Phase 2**, involving the construction of a new high-speed line **between Dax and the Spanish border**, with cost estimates dating from earlier studies (approximately EUR 4 billion, which in 2026 prices would correspond to EUR 5.5 billion) and expected to be updated in forthcoming project studies. Completion is not expected before 2040.

Cross-border France - Spain:

- **Y Basque – LNSO** cross-border HSL, including Astigarraga–Lezo and the link towards the French border. The progress of this project is interdependent with the advancement of Phase 2 of the LNSO.

7.2.2. Investments contributing to TEN-T KPI compliance

In addition to high-speed rail development, approximately EUR 22 billion is allocated to projects improving the performance and interoperability of the conventional railway network. These investments directly support the achievement of TEN-T infrastructure parameters, including:

- electrification
- 740-metre train length capability
- freight speed improvements

- loading gauge conditions compatible with semi-trailers intermodal transport
- signalling and operational upgrades.

Examples of investments contributing to TEN-T KPI compliance include:

- **Madrid – Talayuela** conventional line electrification and upgrade (EUR 235.5 million), intermediary step part of the implementing decision Madrid-Lisbon by 2030
- **Bobadilla – Algeciras** corridor upgrades in Spain, including electrification, P420 loading gauge and 740-metre train capability (EUR 247 million)
- **Salamanca – Fuentes de Oñoro** electrification and signalling upgrades in Spain (EUR 149 million), to be completed by the end of 2026
- Tunnel clearance works between **Hendaye and île-de-France** (EUR 450 million) in France to improve freight loading gauge (EUR 52 million)

Further investments planned **by 2035** include:

- **Puertollano – Mérida** line improvements including electrification and train length (EUR 509 million), by 2032
- Electrification of the **Linha do Leste in Portugal** (EUR 70 million), by 2034

7.2.3. Capacity expansion

Some rail investments along the Corridor are primarily aimed at **increasing capacity at key nodes** and strategic sections of the network, particularly where freight and passenger flows converge.

One example concerns capacity improvements in the **Mannheim rail node in Germany**, including infrastructure upgrades such as the Studenheimer Kurve, designed to accommodate growing freight flows and improve operational reliability on this section of the Corridor. Recent studies have also shown a growing capacity constraint on the **Bordeaux rail node**, which will need infrastructure upgrade to cope with the targeted increases in freight and passenger traffic.

7.3. ERTMS Deployment Plan

The TEN-T Regulation ⁽³⁹⁾ mandates the completion of the ERTMS deployment on the core network by 2030 and on the extended core network by 2040. Based

⁽³⁹⁾ Regulation (EU) 2024/1679 of the European Parliament and of the Council of 13 June 2024 on Union guidelines for the development of the trans-European transport network, amending Regulations (EU) 2021/1153 and (EU) No 913/2010 and repealing Regulation (EU) No 1315/2013

on current national deployment plans, ERTMS is expected to be operational by 2030 on around 35% of the Atlantic core network (i.e. approximately 4 100 km). By 2040, ERTMS will be deployed on 7% of the ATL extended core lines (i.e. approximately 100 Km).

The following table indicates the national roll-out plans on the ATL ETC by 2030, 2035 and 2040, as well as the percentage of the ATL ETC equipped per country each year.

Table 7-1: ETCS deployment plans per country on the ATL ETC by 2030, 2035 and 2040 ⁽⁴⁰⁾

	Total (Km)	Length to be equipped by:					
		2030 (Km)	2030 (%)	2035 (Km)	2035 (%)	2040 (Km)	2040 (%)
ATL	13 551	4 144	31%	5 186	38%	5 351	39%
France	5 317	871	16%	1 375	26%	1 540	29%
Germany	170	70	41%	73	43%	73	43%
Portugal	2 021	1 059	52%	1 423	70%	1 423	70%
Spain	6 044	2 144	35%	2 314	38%	2 314	38%

Source: Third Work Plan of the European Coordinator Matthias Ruete: Annex V ⁽⁴¹⁾

7.3.1. Plans for deployment by country on the ATL ETC

In Germany, only 170 km belongs to ATL ETC. According to the German plans, 70 km of ATL network is scheduled to be commissioned by 2029, while the rest of the network has not been planned yet. Contrary to what has been presented in the NIP, the Bundesministerium has confirmed the intention from Germany to equip a part of the Saarbrücken-Mannheim line in 2028 with ETCS Level 2.

In France, ETCS is already in operation in several lines of ATL ETC. There are plans for commissioning of ETCS on the rest of ATL sections until 2044. Approximately 60% of the network belonging to ATL corridor are not included in France's ETCS deployment plan.

In Spain, ETCS is already in operation in several lines of ATL ETC. There are plans for commissioning of ETCS on the rest of ATL corridor between 2025 and 2032. Additionally, the ES NIP has outlined plans to deploy ETCS on three lines

⁽⁴⁰⁾ The ERTMS data are based on the ERTMS Work Plan published in February 2026 and typically refer to a cut-off date of end 2024. Since then, the situation in some Member States may have evolved, sometimes also altering the projections for deployment in 2030 or beyond. More recent data will be published at the latest in the annual update of the ERTMS work plan. For instance, in Portugal, Porto-Lisbon, Porto-Vigo have not been taken into account and in Germany, the value by 2030 can be confirmed, while the values after 2030 cannot as the digitalisation strategy is currently being revised. Without prejudging the outcome of the digitalisation strategy, Germany wants to keep the ERTMS deployment ambitious. In Spain, Burgos - Vitoria (2032) and Zaragoza - Pamplona - Vitoria will be equipped 2035 and were not included in this assessment.

⁽⁴¹⁾ Available at: [link](#).

between 2030 and 2045, although specific commissioning dates have not been provided. However, 70% of the network within ATL ETC are not included in Spain's ETCS deployment plan.

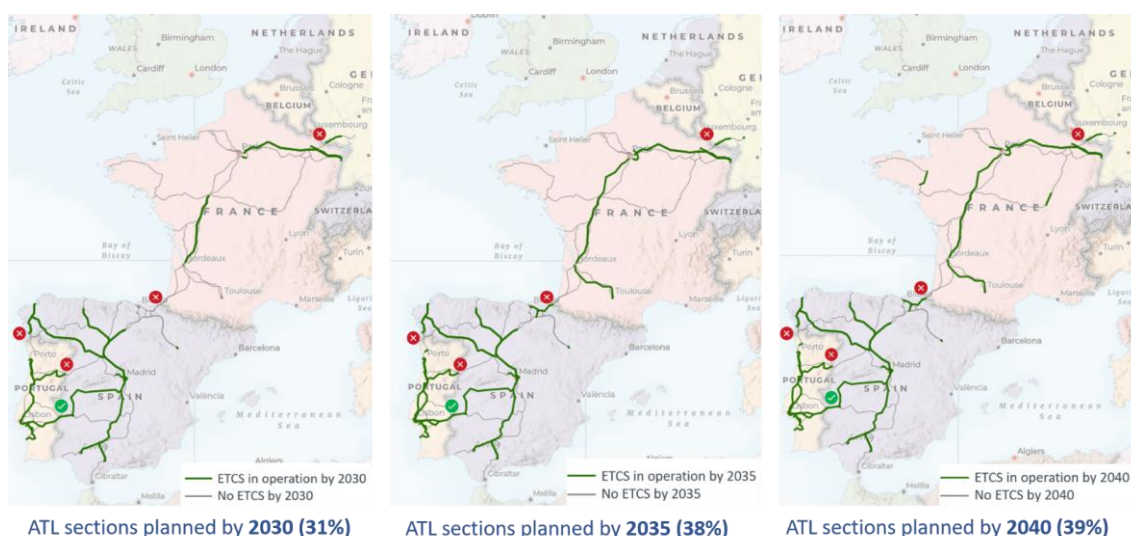
In Portugal, the lines border ES/PT (Badajoz) – Évora and border ES/PT (Vilar Formoso) – Pampilhosa, which construction is now finalised, are expected to be commissioned over the coming years, with a target completion date of 2028. There are plans for commissioning ETCS on the rest of ATL sections between 2030 and 2034. Almost 30% of the network belonging to ATL Corridor are not included in Portugal's ETCS deployment plan.

7.3.2. Overview of ETCS deployment plans on the entire corridor

Considering the national plans for the ATL Corridor, 4 144 km (31%) of this corridor are expected to have ETCS in operation by 2030, 5 186 km (38%) are scheduled by 2035, and 5 351 Km (39%) are planned by 2040.

The following figures show the state of play for the ERTMS deployment in the ATL corridor in the years 2030, 2035 and 2040:

Figure 7-4: Atlantic Corridor ERTMS deployment plan



Source: Third Work Plan of the European Coordinator Matthias Ruete: Annex V ⁽⁴²⁾

By 2030, it will be possible to travel using ETCS from Spain to Portugal via the border crossing at Elvas. Within Spain, ETCS will enable seamless north–south travel across the country. In Portugal, ETCS-equipped routes will allow travel from Porto to Lisbon, as well as from Lisbon to Sines.

⁽⁴²⁾ Available at: [link](#).

The connection between Vigo (Spain) and Porto (Portugal) and the border crossing in Fuentes de Oñoro are not planned to be operational with ETCS.

Additionally, despite intention from Germany to equip the Saarbrücken-Mannheim line in 2028 with ETCS Level 2, the cross-border between Metz - Remilly (France) and Saarbrücken (Germany) is currently being studied to be equipped with ERTMS.

Its deployment would allow expanding capacity on the Paris–Eastern France–Southwest Germany corridor for high-speed passenger traffic. It is important to stress that for freight traffic, implementation of ETCS on the extended core line Homburg–Neunkirchen–Saarbrücken is also of key importance for the cross-border traffic. The deployment of ERTMS on the cross-border section Metz-Remilly-Forbach-Saarbrücken would be an asset for freight and passenger traffic between France and Germany.

As regards the connections between France and Spain, despite the deployment of ERTMS on the new high-speed lines (Y Basque and LNSO Phase 1), there is no plan to equip the convention line connecting these high-speed lines, namely between Irún - Hendaye and Dax / Bordeaux. In addition, Tours – Paris high-speed line is not planned neither. Further, Bordeaux and Paris nodes are not planned to be equipped with ETCS according to French ETCS deployment plans.

7.4. The Position of rail freight stakeholders consulted by the Rail Freight Governance on the ETC Project List

Rail freight stakeholders, represented through the Rail Advisory Group (RAG) of the Atlantic Rail Freight Corridor, provided feedback on the rail infrastructure investment plan included in this Work Plan. Their input highlights the importance of ensuring a railway network that offers sufficient quality, capacity, interoperability, reliability and resilience to support the competitiveness of rail freight services along the Corridor.

From the perspective of railway undertakings (RUs), the railway network must be considered as a fully integrated logistics ecosystem connecting infrastructure, terminals, service facilities, ports and border crossings. Consequently, stakeholders emphasise that infrastructure investments should not only focus on the development of mainline tracks but must also ensure adequate connectivity with terminals, ports and intermodal facilities, enabling seamless operations from origin to destination across the Corridor.

Rail freight operators also stress the importance of predictability in the implementation of infrastructure projects. In particular, they underline that the timely completion of projects and the clear communication of construction schedules are essential for freight operators to adapt their services, manage

temporary operational restrictions and plan investments in rolling stock and equipment.

The consultation process highlighted several technical and operational aspects that are particularly relevant for the performance of rail freight along the Atlantic Corridor.

Track gauge and interoperability

Stakeholders emphasised the importance of ensuring efficient transshipment and interoperability between the Iberian and standard European track gauges, particularly at key terminals such as Vitoria Jándiz. Infrastructure developments at this location should allow efficient transfer operations between gauges while maintaining the operational requirements of freight services, including the ability to handle 740 metre trains.

Operators also underline that current freight flows in Spain extend beyond Vitoria, meaning that transshipment or axle-change operations will continue to be necessary to reach other terminals across the Iberian Peninsula.

Train length (740 m)

The possibility to operate 740 metre trains along the entire Corridor is considered essential for improving rail freight competitiveness. Stakeholders highlight that compliance with this parameter should not only apply to the mainline infrastructure but also to terminals, ports and border stations, ensuring that trains can operate at full length from origin to destination without operational constraints.

Electrification

Rail freight operators highlight the importance of providing clear timelines for the electrification of remaining sections of the network, particularly on the Iberian Peninsula. In this context, projects such as the electrification of the Linha do Leste in Portugal and sections around Puertollano in Spain are seen as important for strengthening cross-border freight connectivity. Greater clarity regarding implementation timelines would support operational planning and investment decisions by railway undertakings.

ERTMS deployment

Stakeholders also stress the need for a more detailed and predictable roadmap for the deployment of ERTMS along the Corridor. The lack of clear planning information may create uncertainty for railway undertakings when planning rolling stock investments, particularly regarding onboard equipment. Improved visibility

on deployment schedules would therefore facilitate investment decisions and reduce risks associated with the coexistence of different signalling systems.

Intermodal transport and rail transport of semi-trailers capability

The ability to rail transport of semi-trailers is considered an important element for supporting the development of combined transport services along the Corridor. Stakeholders highlight that limitations in loading gauge along certain sections of the network may restrict the development of rail motorways and limit the potential for intermodal services between Germany, France, Spain and Portugal.

Network continuity

Finally, freight operators underline the importance of ensuring network continuity and addressing remaining missing links along the Corridor. In this context, stakeholders have pointed to the potential relevance of strengthening freight connectivity between Porto and Vigo, currently not included in the TEN-T network for freight, which could enhance network effects and improve freight flows along the Atlantic façade. Any future infrastructure developments would need to comply with TEN-T technical parameters and be supported by an appropriate investment plan.

In conclusion, **the main messages conveyed by members of the Rail Advisory Group (RAG) and the Terminal Advisory Group (TAG) to the European Transport Corridor Coordinator are:**

- the importance of providing reliable and predictable information on future infrastructure developments to support long-term investment decisions by freight operators and shippers;
- the importance of maintaining a competitive balance between rail and road transport;
- the need to ensure the economic sustainability of railway undertakings during prolonged periods of infrastructure works;
- the strategic importance of multimodal freight terminals in supporting efficient international freight transport.

7.5. Multimodal freight terminals

The Atlantic European Transport Corridor Project List includes investments of approximately **EUR 791 million** dedicated to the development and upgrade of multimodal freight terminals.

These investments contribute directly to the achievement of Corridor Key Performance Indicators, particularly by increasing the capacity to handle intermodal units, enabling the operation of 740-metre freight trains without manipulation and expanding the availability of alternative fuel recharging infrastructure.

A significant share of these investments is located in Spain, including the terminals of Huelva, Antequera, Madrid, Valladolid, Júndiz–Vitoria, San Sebastián, León and Zaragoza, representing a total investment of EUR 411.7 million. Additional investments are planned in France, notably in the Paris area, Bayonne, Metz and Strasbourg (EUR 173 million), and in Portugal, including Leixões, Guarda, Alfarelos and Sines (EUR 205 million).

These developments are expected to support compliance with key TEN-T parameters, in particular the operation of 740-metre trains at several terminals across the Corridor, including Madrid, Leixões and the Paris region terminals.

All terminal investments currently included in the Project List are scheduled for completion before 2030. However, several projects have not yet entered construction phase, which will require particular attention and close monitoring to ensure timely delivery in line with TEN-T objectives.

7.6. Road transport

Under the TEN-T Regulation, the main infrastructure parameters for the road network of the Atlantic European Transport Corridor are already largely met. As a result, the road component of the Corridor is considered mature, which explains the limited volume of new investment required.

Nevertheless, the Regulation introduces a Key Performance Indicator for 2040 concerning the availability of Safe and Secure Truck Parking Areas (SSTPA) along the TEN-T network. Member States are required to ensure sufficient certified parking capacity along the core and extended core road network, including facilities located on the TEN-T road or within a short driving distance from motorway exits, with an average spacing of around 150 km between such areas.

The road projects currently included in the Atlantic Corridor Project List represent an investment of approximately **EUR 235 million**. A share of these investments contributes directly to the development of safe and secure parking areas in Spain, improving driver safety and supporting compliance with the TEN-T requirement on truck parking infrastructure.

Additional road investments are located in Portugal, where projects focus primarily on improving road connectivity to the Port of Sines, including motorway upgrades and the construction of an overcrossing at Alfarelos associated with the

railway rolling motorway terminal. While these investments do not directly address the SSTPA requirement, they contribute to improving the integration of road and rail freight operations within the Corridor logistics system.

Most of these road investments are expected to be completed between 2026 and 2027, with the remaining works planned by 2030. Further developments in safe and secure truck parking capacity may still be required to ensure full compliance with the TEN-T 2040 requirement along the Corridor.

7.7. IWW transport and inland ports

Inland waterway projects within the Atlantic European Transport Corridor address four waterways: the Tagus and Douro in Portugal, the Guadalquivir in Spain and the Seine in France. The Guadalquivir in Spain already meets the relevant TEN-T requirements, as does the Seine in France. The inland waterway projects identified for France are located on the Seine–Scheldt waterway system and are therefore common to both the Atlantic ETC and the North Sea–Rhine–Mediterranean Corridor.

In Portugal, the Tagus inland waterway project, with an investment of **EUR 22 million**, aims to create the conditions for the recovery of inland waterway transport in the port of Lisbon. It focuses on restoring navigability and strengthening waterway connections between port terminals located upstream in the estuary and the logistics area of Castanheira do Ribatejo. The project is scheduled for completion by 2028, although works have not yet commenced.

The Douro inland waterway project in Portugal, with an investment of **EUR 83 million**, addresses geometric corrections of the navigation channel at two bottlenecks, the modernisation and upgrade of the river's five locks and the deployment of upgraded RIS, which are needed not only for infrastructure compliance, but also for safety, boosting freight market, tourism-related traffic management and cross-border coordination. The works are planned to be completed by 2030.

These inland waterway projects should also be seen in connection with the ports and logistics system of the Atlantic Corridor. Both Tagus and Douro projects can support port-hinterland links, reduce pressure on road traffic and reinforce the role of Portuguese ports in multimodal freight supply chains.

In addition, ten projects related to inland ports are included in the Atlantic ETC Project List. Six of these focus on improving road or rail access to inland ports in Sevilla, the Douro area, Strasbourg and Paris, while the remaining three projects aim to promote multimodal facilities in the port of Paris and another for the OPS in the inland port of Seville. All inland port projects are scheduled for completion before 2030.

7.8. Maritime ports

The Atlantic European Transport Corridor Project List includes seventeen projects related to maritime ports, representing a total investment of **EUR 2.4 billion**. Of these, two projects concern port infrastructure and operations, while the remaining fifteen focus on improving road, rail and waterway access to maritime ports.

Two of the access projects were completed before the end of 2025, improving road and rail connections at the terminals of Sines and Leixões.

The largest investments in the maritime port portfolio include:

- An overall investment of **EUR 1.1 billion** for the port of Bilbao referring to the new section of the conventional line for freight transport (**South rail bypass**) to the port of Bilbao (**EUR 590 million**) and the construction of a **road and rail underwater tunnel in Bilbao (EUR 543 million)**. This project aims to enhance access to the port of Bilbao and the airport, while alleviating congestion on the metropolitan road network. Completion of the project is foreseen by 2034.
- Another major single investment is the road project M28 Cork to Ringaskiddy, establishing the **motorway from the outskirts of Cork City to the Port of Cork** at Ringaskiddy, with an investment of EUR 456 million and conclusion expected by 2028.

Other major investments include:

- **Rail and road last mile connections and rail terminals in Algeciras Port:** Upgrading rail access and 740 terminals in the port, and new northern access to the port, with an investment of **EUR 204 million** and completion expected by 2030;
- works to improve river access to Port 2000 in Le Havre, amounting to **EUR 197 million** and planned for completion by 2027;
- the **rail connection of the outer port of A Coruña**, with an investment of **EUR 160 million** and completion foreseen in 2026; and,
- in Ireland, the project for the **Shannon Foynes Port Rail Link**, enabling the reinstatement works for the Shannon Foynes Port rail link to the national rail network at Limerick city, with an investment of EUR 104 million and conclusion by 2027.

Other relevant investments include:

- the **improved rail connection to the port of Seville**, establishing a direct connection to the port (by-pass) and electrification with a total investment

of **EUR 49.7 M** and completion expected by **2026** (by-pass) and **2030** (electrification);

- **New road connection of Granadilla Port (Tenerife):** New construction and direct connection to TF-1 road from Granadilla Port. With an investment of **EUR 40.2 M** and a completion date expected by **2030**;
- the **Land Accessibilities to the port of Leixões**, including the reconfiguration the internal route connecting to the Port of Leixões;
- **the modernisation of port road accessibilities and road accesses to pole 1 of the Port of Leixões Logistic platform**, with an investment of EUR 20 million to be concluded until 2030; and
- the **expansion of railway infrastructure connecting terminals and industries upstream of the Port of Setúbal** to the TEN-T network, with an investment of EUR 28 million until 2030.

Also in the port portfolio, but dependent on the launching of the concession tenders for the new terminal, is the project for the road and rail accessibilities to the future Vasco da Gama Terminal in Sines.

Two projects under rail include adoptions to accommodate 740 m trains, namely the accessibility to the Port of Bilbao ⁽⁴³⁾ (**EUR 9 million**) and the access to the Port of Setúbal (**EUR 39.53 million** ⁽⁴⁴⁾). In addition, investments at Guarda Freight Terminal (Dry Port of Leixões) also include adoptions to accommodate 740 m trains (amounting to **EUR 4.03 million**), reinforcing the hinterland connectivity for Portuguese ports.

7.9. Airports

Six projects related to rail connections to airports are included in the Atlantic European Transport Corridor Project List, representing a total investment of **EUR 5.4 billion**.

Investments for rail connections to airports:

- Sevilla Airport – conventional rail connection to the national rail network (EUR 299 million)
- Madrid Barajas Airport – high-speed rail connection to the Spanish high-speed network (two projects at the costs of EUR 273 million and EUR 1.17 billion)

⁽⁴³⁾ Upgrade of Miranda de Ebro - Bilbao conventional line for 740 m trains.

⁽⁴⁴⁾ This figure includes other infrastructure works on the Linha do Sul, to upgrade the section between the Port of Setúbal and Praias do Sado.

- Paris Orly Airport – improved connectivity through the Pont de Rungis station, improving access to the high-speed rail network, but not directly to the airport (EUR 445 million)

Investment in airports with less than 12 million passengers per year for light-rail connection (metro):

- Bordeaux Airport – metro connection improving access to the rail network (EUR 95 million)
- Toulouse Airport – connection through the Toulouse Aerospace Express metro line (EUR 3.15 billion)

The largest investment concerns the studies and works for the implementation of the Toulouse Aerospace Express project, corresponding to the third metro line in Toulouse, with an estimated investment of EUR 3.15 billion and an expected completion by 2028.

The most significant project in terms of its contribution to Corridor Key Performance Indicators is the high-speed rail connection in standard European gauge to Madrid Barajas airport. The total investment associated with this project amounts to EUR 1.4 billion. The first phase is expected to be completed by 2030, with full completion foreseen by 2034.

7.10. Urban nodes

Several projects included in the Atlantic European Transport Corridor Project List contribute to strengthening **multimodal passenger hubs (MPHs)** and improving the integration of urban nodes into the Corridor network.

Dedicated investments are planned in a number of urban nodes, including:

- Oviedo – renewal of the Oviedo railway station (EUR 53 million);
- A Coruña – construction of the bus terminal integrated within the San Cristóbal intermodal area (EUR 34 million);
-

In addition, several major railway infrastructure projects contribute to strengthening multimodal passenger hubs through the construction of new stations or the upgrade of existing ones, notably in the context of the Y Basque high-speed network.

No projects specifically dedicated to the preparation or implementation of **Sustainable Urban Mobility Plans (SUMPs)** are currently included in the Atlantic ETC Project List. However, several urban nodes along the Corridor are planning to update or revise their SUMPs in line with the requirements set out in Annex V of the TEN-T Regulation.

8. Annex 4: New policy framework and initiatives

8.1. Deployment of alternative energy infrastructure

The TEN-T Regulation (EU) 2024/1679 fully incorporates the requirements of the Alternative Fuels Infrastructure Regulation (AFIR), reinforcing the role of the TEN-T network in supporting the transition towards low- and zero-emission transport.

Across the Atlantic European Transport Corridor, the deployment of alternative energy infrastructure is progressing across transport modes, although the level of maturity differs depending on the sector. The main developments and remaining gaps are summarised below.

Road transport

Electric recharging infrastructure is already widely available along the Corridor for passenger vehicles. However, recharging and hydrogen refuelling infrastructure dedicated to heavy-duty vehicles remains limited, particularly at urban nodes and Safe and Secure Truck Parking Areas. Ensuring continuity of service for long-distance freight transport, including cross-border operations, remains an important objective for the Corridor.

According to the European Alternative Fuels Observatory, hydrogen refuelling infrastructure is currently available at the following locations along the Corridor:

- Portugal: Porto
- Spain: Madrid and Puertollano, plus existing developments funded through RRF PATSYD programme in Madrid (2), La Muela (Zaragoza), Getafe (Madrid) and Trujillo (Cáceres)
- France: Nantes, Brest, Tours, Le Havre, Rouen, Paris, Reims, Dijon and Metz
- Germany: Saarbrücken and Ludwigshafen

Further development of hydrogen infrastructure will be required to ensure broader coverage of the Corridor and to support the uptake of hydrogen-powered heavy-duty vehicles.

Maritime transport

The TEN-T Regulation incorporates the requirements of AFIR regarding onshore power supply (OPS) for container, ro-ro and passenger vessels in core ports where applicable.

While no OPS installations were fully operational in Atlantic Corridor core ports by the end of 2025, several projects are currently under development. In particular:

- Le Havre
- Bilbao
- Algeciras
- A Coruña
- Seville
- Sines
- Leixões
- Lisboa
- Nantes Saint Nazaire
- ports in the Canary Islands

are advancing OPS deployment projects that are expected to become operational in the coming years. Additional installations are planned in other Atlantic ports with commissioning foreseen progressively before 2030.

Table 8-1 provides an overview of OPS deployment in Atlantic Corridor ports.

Table 8-1: Maritime Ports on the Atlantic Corridor: OPS installations by end of 2025

Member state	N° of concerned ports*	Estimated required number of connections**	Number of operational connections***	Estimated share of required
Ireland	2	14	0	0%
France	2	14	0	0%
Spain	7	36	0	0%
Portugal	3	21	0	0%
Concerned ports*	14	85	0	0%

* Only ports that require OPS for at least one vessel type according to AFIR regulation

** based on number of ship calls; excluding connections not required by AFIR regulation

*** end of 2025

Source: Institute of Shipping Economics and Logistics

Beyond OPS, ports along the Atlantic façade are increasingly positioning themselves as energy hubs, supporting the deployment of alternative marine fuels and offshore renewable energy supply chains. Investments are being discussed or implemented in several ports, notable for wind farms, including:

- Leixões
- Brest
- Nantes–Saint-Nazaire

- Bilbao
- A Coruña
- Las Palmas
- Gijón
- Algeciras
- Huelva
- Sevilla
- All the Irish ports

These developments reinforce the role of the Atlantic Corridor as an important gateway for both sustainable transport and renewable energy logistics. Synergies are also very important, where ports can deliver on SAF production for airports, with a flagship innovative project such as Take Kair in Nantes Saint Nazaire.

Shore-side electricity supply for inland waterway vessels is currently available at the ports of Paris and Chalon-sur-Saône, while similar facilities are not yet deployed in Portuguese inland port of Lisbon. In the case of the Douro Inland Waterway, electricity supply is already available at some quays.

The deployment of OPS and alternative fuels infrastructure in ports should follow a realistic and coordinated approach, taking into account grid capacity, investment costs, demand maturity, energy prices, and alignment with shipping companies' fleet deployment plans.

Aviation

At airports along the Corridor, several infrastructure gaps remain in relation to energy and decarbonisation requirements. Pre-conditioned air supply systems, which allow aircraft to receive ground power and air conditioning while parked, are not yet fully deployed at several airports, including:

- Porto
- Toulouse
- Bordeaux
- Paris Charles de Gaulle
- Paris Orly
- Cork
- Dublin

Alternative fuels infrastructure also requires further development at several airports, including:

- Lisbon
- Porto
- Dublin
- Cork

At present, no major projects addressing these gaps are foreseen for completion before 2030.

The development of Sustainable Aviation Fuels (SAF) is also emerging as a key element of the aviation decarbonisation pathway. In this context, initiatives such as the Take Air project aim to support the development of SAF production and supply chains within the Atlantic region, in particular in France, as well as ongoing refinery adaptation projects in Spain, including the conversion of three existing facilities, and Iberia's initiative to develop its own dedicated production plant.

Urban nodes and terminals

The deployment of alternative fuels infrastructure is also relevant for urban nodes and logistics terminals along the Corridor. While electric charging infrastructure is already available in most urban areas, hydrogen refuelling infrastructure remains limited and unevenly distributed.

Several multimodal freight terminals will require additional refuelling and recharging facilities in order to support the transition towards low-emission freight transport and ensure compliance with the relevant TEN-T and AFIR requirements.

Digitalisation and administrative processes

Digitalisation of transport and logistics processes also plays an important role in improving the efficiency of freight operations. Despite the generally advanced position of Atlantic ports in the deployment of Maritime Single Window systems, data exchange and documentation remain a challenge due to the multiplicity of actors involved and the fragmentation of responsibilities. Differences between national Port Community Systems and last-mile digital infrastructures continue to limit seamless interoperability across the logistics chain. The implementation of the Electronic Freight Transport Information (eFTI) Regulation is expected to contribute to improving digital interoperability and reducing administrative burdens across the Corridor.

Port and logistics digitalisation is important for the performance of the Corridor. Better interoperability between port community systems, the Maritime National Single Windows, eFTI platforms, terminal operating systems and hinterland transport systems should be promoted, together with cybersecurity and data-sharing arrangements.

Overview

Overall, the Atlantic Corridor is progressively developing the infrastructure required to support the transition towards low- and zero-emission transport. However, additional investments will be required in several areas, particularly:

- hydrogen infrastructure for heavy-duty road transport
- port electrification and alternative marine fuels infrastructure
- airport ground energy systems and SAF deployment
- alternative fuel infrastructure at logistics terminals.

These developments will be essential to ensure full compliance with **TEN-T and AFIR requirements** and to support the decarbonisation of transport along the Atlantic European Transport Corridor.

8.2. Climate change impacts on infrastructure and need for resilience measures

The next 15 years are critical for completing the core and extended core TEN-T network. To ensure the long-term viability of assets and infrastructure investments and maintain its role as a cornerstone of EU growth, competitiveness, and territorial cohesion, the completed network must be resilient to climate change impacts. As extreme weather events become more common, it is essential that the TEN-T withstands these challenges and remains functional.

Recent extreme climate events in Atlantic Corridor Member States

Recent extreme climate events have highlighted the growing importance of climate-resilient transport infrastructure along the Atlantic ETC. Increasingly frequent weather-related disruptions demonstrate the vulnerability of transport assets and the need to strengthen adaptation and resilience measure.

Several examples illustrate the range of climate hazards affecting the Member States of the Corridor:

- **Portugal:** January 2026, storms Kristin, Leonardo, Marta, Ingrid, Joseph and Nils swept across Portugal over several weeks, bringing a series of depressions, intense rainfall, and cyclonic winds. Wind gusts exceeding 200 km/h and persistent precipitation caused widespread disruption, including fallen trees, blocked roads and railway lines, port infrastructure affected, damaged homes, and prolonged power outages. The central

region and particularly the urban nodes of Leiria and Coimbra were heavily affected.

- **France:** In October 2024, exceptional flooding led to 380 municipalities being designated as natural disaster zones, particularly in the southern and central-eastern parts of the country.
- **Spain:** In October 2024, floods in the Valencian Community, Castilla-La Mancha and Andalusia caused devastating effects in the area, which was declared as a natural disaster zone.
- **Spain and Portugal:** Wildfires in October 2024 continued a trend of increasingly frequent fire events across the Iberian Peninsula. Earlier, in August 2023, a major forest fire on the island of Tenerife severely affected transport infrastructure and led to large-scale evacuations.
- **Germany:** In December 2023, parts of the Rhine were closed to navigation due to exceptionally high-water levels caused by heavy rainfall and snowmelt. Mannheim, a key Atlantic Corridor node in Germany located at the confluence of the Rhine and Neckar rivers, was significantly affected, as high water levels restricted vessel clearance under bridges.
- **Portugal:** In December 2022, severe flooding in Lisbon led to the closure of numerous railway lines, roads and tunnels and resulted in the temporary inundation of the airport.
- **Spain:** In November 2017, flooding in Andalusia forced train cancellations and caused the derailment of a passenger train, injuring 27 people. The region was again affected by major flooding in October 2018, damaging rail infrastructure and disrupting services between the port of Algeciras and Antequera, as well as other regional connections, for several months.
- **Ireland:** In August 2008, Ireland experienced a series of flash floods following exceptionally heavy rainfall in July, the highest recorded since 1975. The floods affected counties including Cork, Dublin and Limerick, submerging parts of the country's largest urban nodes.

These events illustrate the exposure of transport infrastructure to extreme weather events, which are expected to increase in both frequency and intensity. Infrastructure is also increasingly exposed to long-term climate trends such as heatwaves affecting rails and catenary systems, as well as sea-level rise and coastal submersion risks, particularly for ports and infrastructure located close to sea level.

TEN-T climate adaptation studies

The support study on the climate adaptation and cross-border investment needs ⁽⁴⁵⁾ confirms that all transport modes on the TEN-T network are already exposed to growing climate risks, including:

⁽⁴⁵⁾ Support study on the climate adaptation and cross-border investment needs to realise the TEN-T network, European Commission (2024). Available at: [link](#).

- heatwaves
- river flooding
- wildfires
- coastal flooding.

The study conservatively estimates that investment of around **EUR 71 billion** (2023 prices) will be required to adapt the TEN-T network to projected mid-century climate conditions. In parallel, institutions such as the European Investment Bank (EIB) and JASPERS provide advisory support to infrastructure managers, including assistance with climate risk assessments and the development of adaptation strategies.

Corridor working groups and best practices

Over the past two years, the Atlantic and Mediterranean Corridors have jointly organised two working groups dedicated to climate resilience of TEN-T infrastructure. These meetings provided an opportunity for infrastructure managers, Member States and stakeholders to exchange experiences on adaptation strategies, monitoring systems and resilience measures.

The discussions highlighted a range of climate risks and adaptation practices across transport modes.

Flooding and extreme water levels

Flooding remains one of the most significant sources of disruption across the Corridor. It affects railway lines, roads, ports and airports, damaging drainage systems, embankments and platforms.

- Adaptation measures discussed include:
- upgrading drainage system
- reinforcing quays and riverbanks
- improving flood-risk monitoring systems
- implementing digital tools such as digital twins for rivers and estuaries to support predictive water-management systems.

Heatwaves and extreme temperatures

Heatwaves increasingly affect transport infrastructure, particularly rail and road networks. High temperatures can lead to track deformation, increased maintenance requirements and disruptions to signalling and electronic systems.

Examples of adaptation measures include:

- new pavement materials and rail technologies

- revised maintenance cycles
- operational measures such as adjusted working hours during extreme heat events
- improved cooling systems for sensitive equipment.

Wildfires, landslides and ground instability

Wildfires and landslides are emerging risks in several regions of the Corridor. In addition, ground movements linked to clay shrink–swell cycles have been identified as structural risks in some areas.

Mitigation approaches include:

- vegetation management along transport corridors
- soil stabilisation techniques
- improved monitoring systems for ground movements.

Coastal risks and sea-level rise

Ports and coastal infrastructure face additional risks related to sea-level rise, coastal erosion and marine flooding. Ports also reported challenges linked to salinity intrusion and water scarcity.

Adaptation measures discussed include:

- quay reinforcement
- elevation of vulnerable infrastructure
- ecosystem protection and nature-based solutions.

More broadly, stakeholders emphasised the importance of redundancy and multimodal connectivity, enabling traffic to be rerouted when infrastructure disruptions occur.

Additional resilience considerations

Climate resilience measures are often integrated into infrastructure renewal and maintenance programmes, rather than appearing as stand-alone projects. As a result, many resilience-related interventions do not appear explicitly in the Atlantic ETC Project List.

Nevertheless, several Corridor investments contribute indirectly to resilience. For example, projects improving multimodal connectivity and network redundancy enhance the ability of the transport system to maintain operations during disruptions.

Additional resilience benefits may also arise from projects supported under the Military Mobility envelope, which in some cases involve strengthening infrastructure standards, such as bridge capacity or the protection of strategic assets. Although primarily designed for defence and logistics purposes, such improvements can also enhance the robustness of transport infrastructure.

Finally, the importance of contingency planning and operational coordination has been highlighted at the Corridor level. In this context, the contingency mechanisms developed by Rail Freight Corridors following the Rastatt incident provides a useful example of coordinated crisis management that could inspire similar approaches across the broader TEN-T Corridor framework.

8.3. Measures to mitigate negative environmental impacts

This section presents selected examples of technical solutions that are being implemented or are planned within projects along the Atlantic European Transport Corridor to mitigate negative environmental impacts. These measures address both the vulnerability of transport infrastructure to climate-related risks and the environmental footprint of projects throughout their implementation and operational life cycle.

The examples illustrate approaches applied across different transport modes, including rail, maritime ports and multimodal hubs. They demonstrate how environmental considerations are increasingly integrated into project design, construction and operation, contributing to improved sustainability, resilience and alignment with EU climate and environmental objectives.



The **Madrid-Chamartín Clara Campoamor** station is undergoing a comprehensive transformation to become a global benchmark for sustainable, multimodal and integrated mobility. The station is set to double its high-speed rail capacity—from 6 to 12 tracks on standard European gauge—while modernising 13 additional tracks for commuter, medium, and long-distance services on Iberian gauge. In this process Adif incorporates five sustainability pillars: natural and recycled materials, carbon footprint circularity, efficient water use, rainwater recovery, and photovoltaic energy generation.

Main Climate change hazards/extremes considered: No climate hazards/ extremes directly considered; Environmental/ indirect climate change considerations: CO₂ (and emissions in general) reduction, Urban Heat Island Effect, Extreme heatwaves and drought.

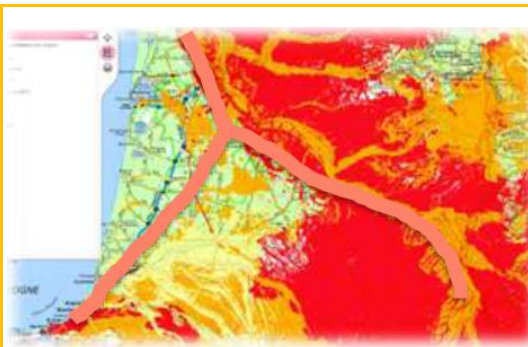
Adaptation Measures Implemented: Use of natural and recycled materials to reduce environmental impact; Solar photovoltaic panels for energy generation. Rainwater collection and smart water management systems

East Coast Railway Infrastructure Protection Projects (ECRIPP) initiative looks to provide improved coastal protection to the railway between Dublin and Wicklow. The project looks to intervene now where a need will exist between 2025 and 2050 to protect to 2075. Interventions look to protect against 1:200 storm event and climate change impacts on sea level rise and storminess.



Interventions include:

- Raised walls, flood glass and new amenity footpaths to high use, urban areas.
- New seawalls with footpaths transitioning to rock armour revetments to beach areas on urban extremities
- Rock revetments to rural coastal areas



Clay shrinkage sensitivity – In red : highly exposed



Flooding hazard in blue areas

The LNSO - Bordeaux / Toulouse / Dax - border Spain is crossing a territory where climate change is effective. Main exposures include Extreme Temperature, Sea level, storm & flooding, Forest fire and Ground movement.

The climate adaptation strategy foresees a set of measures to be included in the construction phases:

- Adapt vegetation: herbaceous vegetation and reduced water consuming vegetation
- Adapt soils: appropriate drainage, geomembranes in dry areas, treatment or partial soil replacement
- Adapt railway platforms: reinforce embankments, strengthen structures and monitor for sinkholes
- Infrastructure solutions: use of geogrids, reinforce platforms, and erosion control measures.

In addition, the project incorporates environmental compensation mechanisms, including the restoration of wetlands, reforestation programmes and biodiversity

offset areas aimed at compensating impacts on sensitive ecosystems along the project alignment.

Y Basque High-Speed Rail Network (Spain)

The **Y Basque high-speed rail project** incorporates several environmental mitigation measures aimed at reducing its ecological footprint and protecting sensitive ecosystems in the Basque Country.



Key environmental measures include:

- Extensive use of tunnels and viaducts to minimise land occupation and reduce fragmentation of habitats
- Construction of wildlife crossings and ecological corridors to preserve biodiversity connectivity
- Noise mitigation measures, including acoustic barriers in urban and environmentally sensitive areas
- Landscape restoration programmes and replanting of native vegetation along the corridor.

These measures aim to reduce the project's environmental footprint while ensuring compatibility with the surrounding natural environment.

Évora–Elvas Railway Line (Portugal)

The **Évora–Elvas railway line**, part of the Lisbon–Madrid corridor, integrates several environmental mitigation measures within its construction and design phases.

Environmental considerations include:

- Implementation of fauna passages and ecological crossings to maintain wildlife mobility across the infrastructure corridor
- Landscape integration measures and revegetation with native species
- Soil stabilisation and drainage systems to reduce erosion and protect surrounding ecosystems
- Noise mitigation measures in sensitive areas.



These measures contribute to reducing the environmental impact of the new railway infrastructure while improving resilience to climate-related hazards such as extreme rainfall events.

Beira Alta Railway Line Modernisation (Portugal)



The **modernisation of the Beira Alta railway line** includes environmental improvements linked to infrastructure renewal and electrification.

Measures implemented include:

- Replacement of older infrastructure with more energy-efficient electrified railway systems, reducing emissions associated with diesel traction
- Upgrading drainage systems to improve resilience to heavy rainfall
- Restoration of affected landscapes and vegetation along the railway corridor
- Improvements to slope stabilisation and embankments to mitigate erosion risks.



These interventions contribute both to environmental performance and to increased resilience of the railway infrastructure to climate-related risks.

8.4. Military Mobility

The Corridor's geopolitical role as a key entry route for transatlantic allies from Atlantic ports to the rest of the EU makes it essential to ensure that infrastructure of strategic importance for military mobility is developed, upgraded, and maintained to the highest applicable dual-use standards.

Supporting military deployment and sustainment requires adequate capacity at strategic dual-use ports on the Atlantic coast, including through ensuring adequate maritime access and strengthening their rail and road hinterland connections.

Rail infrastructure plays a central role in military mobility due to its high transport capacity. As a matter of priority, it is necessary to ensure cross-border interoperability, including consideration of rail gauge interoperability requirements, taking into account TEN-T implementation progress and regional defence planning.

Accelerated delivery of key cross-border rail projects, together with increased loading gauge, would significantly enhance military mobility along the corridor by ensuring that the infrastructure can cater for overweight or oversized transport

Road infrastructure remains essential for ensuring flexibility and last-mile connectivity. While most of the network is TEN-T compliant, targeted upgrades are still needed to address critical bottlenecks and ensure dual-use capability, particularly through the strengthening of bridges and the adaptation of tunnels and other key infrastructure.

Additional airport capacity and supporting infrastructure may also be required to facilitate strategic airlift and sustainment operations, particularly during large-scale deployments or crisis situations.

9. Annex 5: Funding and financing tools

9.1. Funding needs

This section presents the economic and financial dimensions of the projects included in the Atlantic European Transport Corridor Project List, with particular attention to investment volumes, project maturity and funding coverage.

Overall, the Atlantic ETC Project List comprises 212 projects, representing a combined investment volume of approximately **EUR 104.4 billion**. Of these, 23 projects had been completed by the end of 2025. The estimated total cost of projects that are ongoing or planned therefore amounts to **EUR 102.2 billion**.

Figure 9-1 provides an overview of the distribution of funding needs by transport mode and by Member State.

Railway infrastructure accounts for the largest share of investment, totalling around **EUR 90.4 billion**. This reflects the scale of investment required to complete the high-speed passenger rail network (circa EUR 78 billion) while simultaneously addressing structural bottlenecks affecting rail freight operations along the Corridor. Major flagship investments include the Y Basque project, the LNSO programme, albeit not in its full extension, and the Lisbon–Madrid and Lisbon–Porto–Vigo corridors. In addition, investments are planned for the electrification of remaining non-compliant sections, with the exception of certain French segments, and for tunnel and infrastructure adaptations supporting intermodal freight transport in line with TEN-T requirements, including corridors such as Sevilla–Algeciras–Madrid–Zaragoza, Madrid–Entroncamento and Bordeaux–Poitiers.

Airport connectivity represents the second largest investment category, amounting to **EUR 5.4 billion**. This includes high-speed rail connections to Madrid Barajas Airport, rail access improvements associated with Porto Airport, and the metro connection serving Bordeaux Airport. **Investments in multimodal passenger hubs** follow, with a total of **EUR 39 billion**.

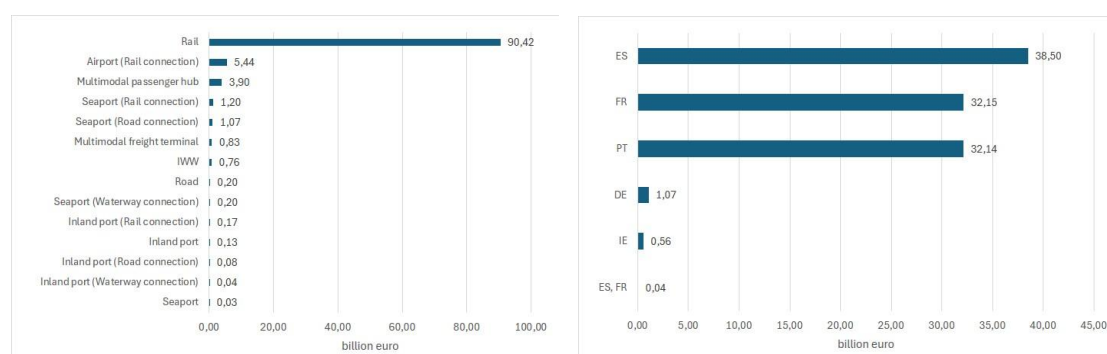
Seaport and inland port connections account for approximately **EUR 2.7 billion**, while **multimodal freight terminals** represent around **EUR 832 million**. It should be noted that the market studies for multimodal freight terminals required under the TEN-T Regulation (EU) 2024/1679 are due by July 2027 and, at present, most of these studies have yet to be initiated.

Investments in **inland waterways** amount to approximately **EUR 763 million**, largely concentrated on the Seine–Scheldt system, the Tagus and the Douro. **Road** investments total around **EUR 202 million**, focusing primarily on the development of safe and secure parking areas in Spain and the construction of a

motorway replacing current express road connection also contributing to improve connectivity to the port of Sines in Portugal.

Based on the projects currently included in the Project List, the largest investment volumes are located in Spain, Portugal and France. However, it should be noted that the Project List does not yet include several major projects under development or at earlier planning stages, and therefore the investment figures presented should be interpreted as indicative rather than exhaustive.

Figure 9-1: Breakdown of funding needs per mode of transport and Member State



Source: Project List 2026, updated June 2026

To assess project maturity, projects have been categorised according to criteria including the availability of official cost estimates, contribution to one or more Key Performance Indicators defined in the TEN-T Regulation (EU) 2024/1679 and planned implementation timelines. Cost data, whether official or estimated, are available for 97% of projects.

Of the 189 projects with completion dates after 2025, 82% contribute to at least one TEN-T KPI. The remaining 34 projects, representing EUR 920 million, do not directly address KPIs but nevertheless support strategic objectives such as capacity enhancement, removal of single-track sections or mitigation of steep gradients, objectives particularly relevant to rail infrastructure. Among projects contributing to KPIs, 117 are linked to the 2030 deadline and 46 to the 2040 horizon.

9.1.1. Funding sources

Among projects for which cost data are available, 85% also provide information on funding sources and cost coverage. However, approximately **EUR 25 billion** of investment has no clearly identified funding source. Projects for which both cost and funding information are available represent a total investment of around **EUR 78.9 billion**.

Of this amount, 59.5% corresponds to funding already formally committed, while the remaining share refers to funding that has been identified but not yet fully secured or confirmed within national or regional financing frameworks.

Public funding represents the largest source of financing across the Corridor. This includes contributions from national governments, infrastructure managers and other public entities, which together account for the majority of the investment value in the Project List. State funding totals **EUR 13.4 billion** and other sources **EUR 51.2 billion**. In many cases these resources are complemented by regional or local authority contributions (amounting to **EUR 8.13 billion**), particularly for projects related to urban nodes, passenger hubs and local connectivity improvements.

EU funding represents approximately **EUR 4 billion** of the investment portfolio. These contributions mainly originate from programmes such as the Connecting Europe Facility (CEF), but also the Next Generation EU and the Cohesion Policy Programme. It plays a critical role in supporting projects with strong European added value, particularly cross-border sections, interoperability measures and preparatory studies.

EUR 1.5 billion are secured by international financial institutions, combining EIB loans with national and EU funding sources, in particular for high-speed rail investments, as it is the case for the Lisbon-Porto HSL. In this context, EU grants often play a catalytic role by supporting early project phases, reducing financial risks and facilitating the mobilisation of additional public and private financing.

9.2. Good practices in infrastructure financing and tools

The Atlantic European Transport Corridor is characterised by a diversity of financing models reflecting different national approaches to funding large-scale transport infrastructure. Several flagship projects along the Corridor illustrate how a **combination of public funding, public–private partnerships and innovative financing mechanisms** can support the delivery of major transport investments.

In Spain, a significant share of high-speed rail investments is delivered through ADIF Alta Velocidad, the dedicated infrastructure manager responsible for the development and management of the high-speed rail network. As the majority of its revenue is generated from market-based activities, the debt of ADIF Alta Velocidad is not recorded as public debt under national accounting rules, and its investments are therefore not considered public expenditure. This institutional model has enabled Spain to finance and develop one of the largest high-speed rail networks in Europe.

In France and Portugal, public–private partnerships (PPPs) have been used to accelerate the development of high-speed rail infrastructure. Two examples from the Atlantic Corridor illustrate different PPP structures.

The Tours–Bordeaux high-speed line, with a total investment of approximately **EUR 7.8 billion**, was implemented through a complete PPP (concession) with the LISEA consortium. The project was financed through a combination of public contributions and private capital, with around **EUR 3.8 billion** mobilised through equity and loans, including financing from the European Investment Bank, while public authorities contributed approximately **EUR 3 billion** and Réseau Ferré de France contributed around **EUR 1 billion**. This PPP model is largely based on traffic revenues and infrastructure charges paid by railway undertakings. This PPP is backed by a State guarantee and is recorded on the State's balance sheet.

By contrast, **the first section of the Porto–Lisbon high-speed line in Portugal** is being implemented under the Avan Norte PPP, with an estimated investment of around **EUR 3 billion**. The financing structure includes **EUR 875 million** from the European Investment Bank, **EUR 900 million** from other financial institutions, **EUR 447 million** from the Connecting Europe Facility and **EUR 150 million** from Infraestruturas de Portugal. The second section (**PPP2**) for which the tender is ongoing includes **EUR 3 billion** from the European Investment Bank and CEF grant (EUR 365 million). Unlike the French example, this PPP is based primarily on availability payments, meaning that the private partner is remunerated for ensuring the availability and performance of the infrastructure rather than relying on traffic revenues. The project also benefits from InvestEU guarantee and is structured to remain off the government balance sheet.

Another example of innovative financing within the Corridor is the **LNSO** connecting Bordeaux, Toulouse and Dax. In addition to contributions from the French State and regional authorities, the project includes a dedicated local taxation mechanism, allowing participating local authorities to contribute to financing the infrastructure.

Beyond rail infrastructure, concession models have been widely used in the Atlantic region, particularly in Portugal, where both ports and airports operate under concession frameworks. This model enables private operators to finance and manage infrastructure under long-term agreements while ensuring public oversight. The planned development of the **new Lisbon airport** provides an example of how large-scale infrastructure projects can be delivered through concession-based financing structures.

EU financial support continues to play an important role in facilitating major infrastructure investments along the Corridor. Programmes such as the Connecting Europe Facility contribute to financing projects with strong European added value, particularly cross-border sections and interoperability measures. In addition to grants and loans, EU advisory services such as the InvestEU Advisory

Hub and JASPERS provide technical and financial expertise to help project promoters structure complex investments and mobilise financing.

Taken together, these examples demonstrate that the Atlantic Corridor benefits from a broad range of financing approaches, combining national funding models, public–private partnerships, concession frameworks and EU financial support. This diversity of financing instruments has played a key role in advancing the development of major transport infrastructure projects along the Corridor.

Getting in touch with the European Coordinator



Mr. François Bausch

European Coordinator for the Atlantic European Transport Corridor

francois.BAUSCH@ec.europa.eu

Julie Buy

Adviser to the European Coordinator

julie.BUY@ec.europa.eu

Corridor website:

https://transport.ec.europa.eu/transport-themes/infrastructure-and-investment/trans-european-transport-network-ten-t/atlantic-corridor_en

Contact details:

European Commission – Directorate General for Mobility and Transport
Directorate B – Infrastructure and Investment
Unit B1 – Transport Networks and Military Mobility



Offices:
Rue Demot 28
1049 Brussels, Belgium



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