

Brussels, 3 December 2025  
(OR. en)

16103/1/25  
REV 1

LIMITE

TRANS 605

#### NOTE

---

From: General Secretariat of the Council  
To: Council

---

Subject: AOB for the meeting of the Transport, Telecommunication and Energy  
Council on 4 December 2025  
Ensuring fair and resilient conditions for the European railway sector  
- Information from Austria and France, **supported by Croatia and  
Portugal**

---

The European rail industry is a global leader in the development and production of railway systems and solutions, forming an essential part of Europe's industrial value chain. It delivers sustainable transport solutions, drives growth and innovation, and represents a major source of employment across the Union. The sector also plays a pivotal role in the green transition of the transport system and in supporting the achievement of the EU's climate objectives.

However, recent challenges in the globalized economy and the increasing entry of suppliers from third countries, often benefitting from substantial state support, is generating growing competitive pressure on European manufacturers and threatening the Union's industrial and strategic autonomy. It must be ensured that a level playing field exists and that the same rules apply to all market participants. Measures at European level are needed to guarantee the competitiveness of Europe's rail industry as well as the independence and security of our mobility systems, while at the same time recognizing the value added of innovation on a global level in a rapidly digitalizing world.

It is crucial to ensure that Europe's mobility systems remain resilient and are not exposed to strategic dependencies on third countries. The security-related dimensions of the rail sector deserve particular attention. The rail system forms part of Europe's critical infrastructure. Whoever controls the software ultimately controls the operation of key European transport routes. Against the backdrop of Europe's strategic autonomy, conducting comprehensive security risk assessments are essential.

In addition to operational safety, every approval procedure with a significant impact on Europe's transport flows must ensure that our transport sovereignty is maintained. Particular attention should be given to the following aspects:

- **Technological sovereignty** – ensuring domestic control over key technologies.
- **Social standards** – compliance with European labour and environmental norms.
- **Regional value creation** – European local content in public investment projects and public procurement.
- **Lifecycle transparency** – ensuring traceability across the entire lifecycle of products and systems.
- **Security audits** – regular assessment of security-relevant components and software.

A strong and competitive rail industry is vital for Europe's economic resilience and strategic autonomy. By creating clear and fair framework conditions, we can preserve Europe's technological leadership, promote skilled jobs and ensure that rail transport remains secure and sustainable. In the longer term, we also have to ensure European leadership in technological know-how, eg through the promotion of vocational training, strong academic programs and by creating favorable conditions for our innovation landscape.

In the light of these considerations, we ask the European Commission to pay attention to these aspects, in particular in the light of the High-speed rail plan as well as legislative proposals and initiatives, and put forward a European Railway strategy, which ensures the future of the European railway industry and safeguards the security and autonomy of our railway system.