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Rail Baltica general progress overview

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Baltic integration in EU railway network

- Part of the TEN-T corridor
- Connection to the European standard railway network by 2030
- Implementation of EU and national strategic goals
- Geopolitical significance

33 million passengers per year

14 million tons of cargo per year



Rail Baltica project scope to ensure a functioning transport, military and economic corridor

Types of railway services

- International passenger transport
- Cross-border regional passenger transport
- Regional passenger transport
- Freight transport, incl. military mobility



7 international passenger stations
45 local passenger stations/stops/halts



3 tunnels



96 railway structures (bridges, overpasses, viaducts, tunnels)



6 Infrastructure maintenance facilities

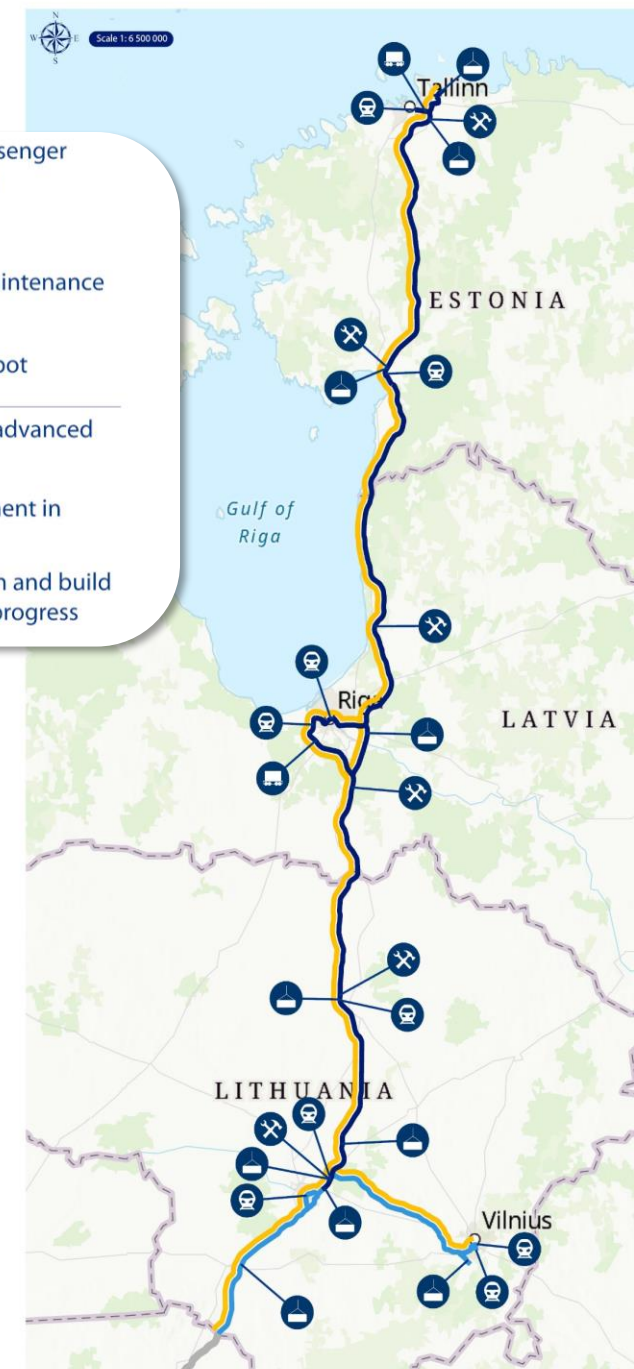


91 wildlife crossings (ecoducts, culverts, overpasses, animal crossings)



Freight terminals + port connection

- International Passenger Station/Terminal
- Freight Terminal
- Infrastructure Maintenance Facility
- Rolling Stock Depot
- Design works in advanced stage
- Design procurement in progress
- ENE & CCS Design and build procurement in progress



Rail Baltica benefits (indicative)

Total economic net value

€ 6.6 billion

The cost-benefit analysis shows that Rail Baltica's economic benefits exceed the planned amounts of investment



Broader Economic Benefits

€ 16,5–22,5 billion*

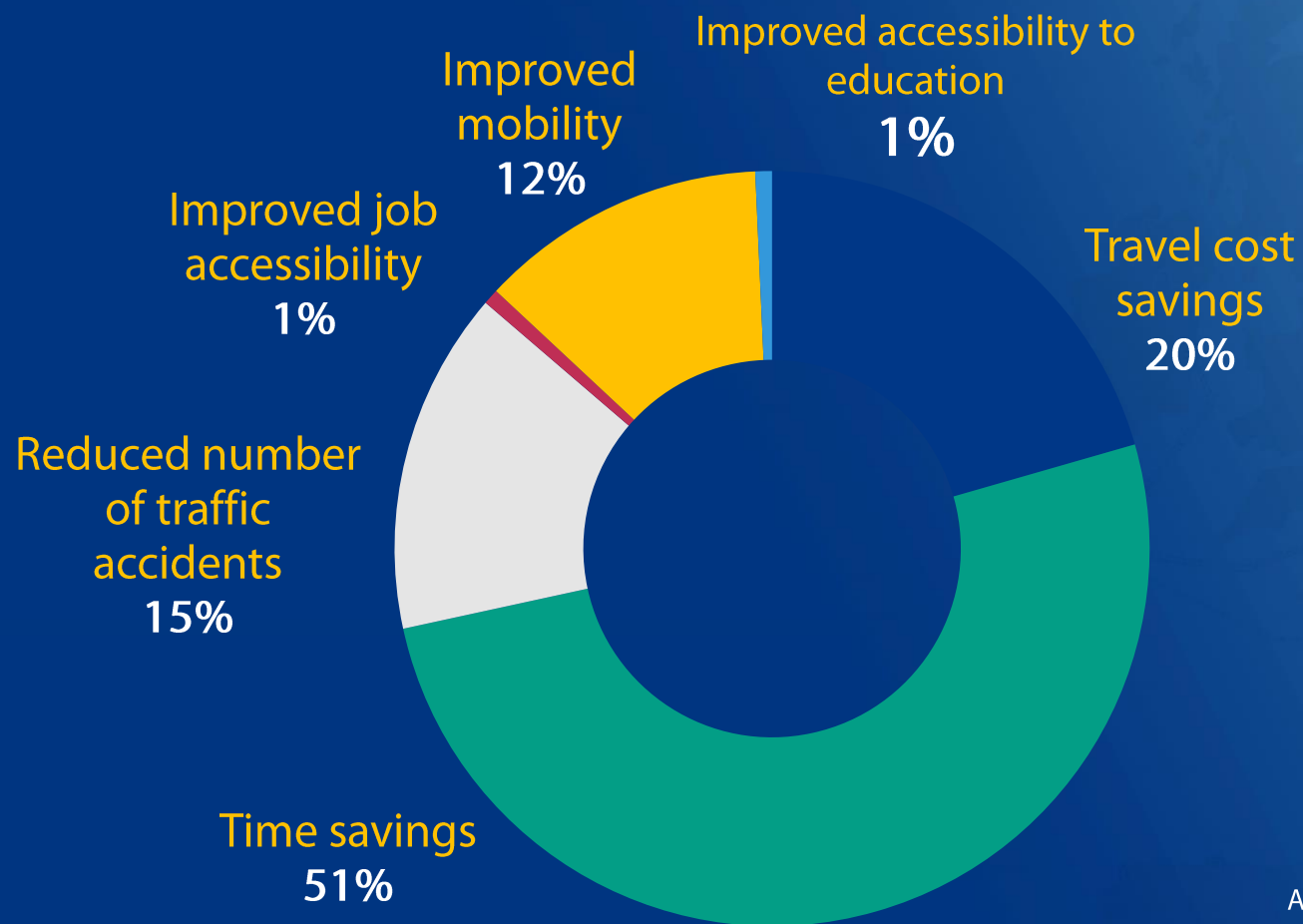
indirect economic impact (GDP)

- Military mobility
- Environmental sustainability
- Social equality
- Corridor synergies
- Impact to the supply chain

Geostrategic benefits

Defense and security of the region
New transportation routes/corridors (Ukraine)
Independence from 1520mm network

Benefits for passengers



Rail Baltica reduces dependence on fossil fuels, stimulates investments in renewable energy technologies, and promotes the use of environmentally friendly transportation methods (indicative data)

Reduced demand for fossil fuel

1.5% - 3.3%

Reduction in fossil energy consumption throughout the region

Modal changes
km per year

X

Required
energy (TJ/km)

X

Total fossil fuel
consumption (TJ)

Increased investments

354
EUR
mio.

Increased investments in
renewable energy

RB transportation
movement (train-
km per year)

X

Required
energy (W/train-km)

X

Atjaunojamās
investīcijas (EUR/W)

Replacement of short-distance flights

11.5
EUR
mio.

Emission savings by replacing
short-distance flights

Short-haul
flights replaced
by RB

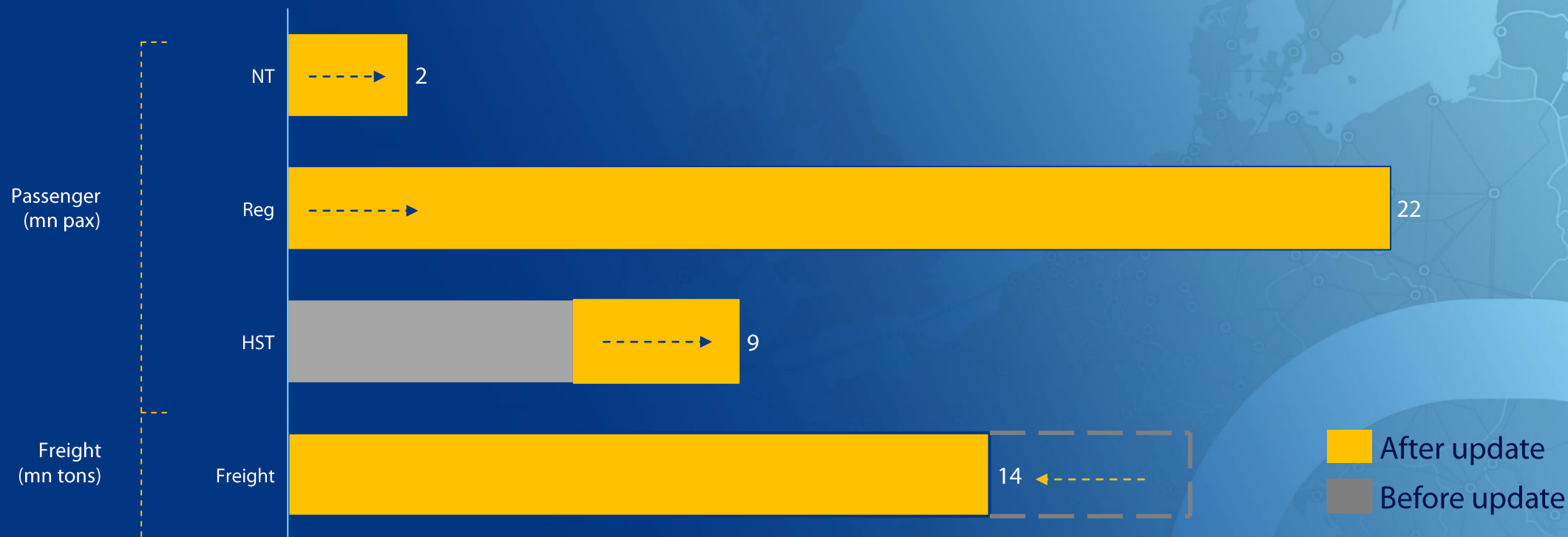
X

Emissions per
flight

X

Emission costs
(EUR)

Due to RB's expanded scope, added services, and updated traffic model, forecasted passenger values rose, with a decline in freight



Note: Compared to the 2017 CBA which contains very limited information on why demand is at the given levels and where demand is not based on the RBM traffic demand model, year 2045 used

Rail Baltica will promote the use of a more environmentally friendly mode of transport



Reduced travel time

Intermodal connections create new forms of mobility

Increased airport capacity as the number of short-haul flights decreases

Environmental benefits

Short-haul flight replacement



Emission savings from
superseding short-haul flights

General progress on Rail Baltica implementation today

Design & Construction

- Master designs for the priority sections are nearing completion
- >100km of mainline to be under construction in the Baltics in 2024
- Consolidated materials' procurements in the final stage
- Electrification & control-command and signalling subsystem 870km design & build procurement ongoing

Delivery Programme 2030

- Project phasing final alignment with the three States
- Investment cost update ongoing, to be finalized with the updated Cost-Benefit Analysis and new-generation Business Plan in 2024
- Inter-institutional Project delivery set-up improvements



Multiple financing sources to be considered



Grants Phasing

- Regarding CEF funding, the project needs to be divided into implementation stages - until 2030 and after.
- Opportunities of CEF Military Mobility and other EU fund calls



National budget Taxes, borrowing & subsidy

- Possibility to raise national co-financing in CEF calls in order to speed up the implementation of the project.
- Baltic states have room to increase carbon taxes
- Borrowing & relending - depend on the cost of borrowing, state aid allowed under EU regulations



Private funding PPPs and concessions

- Allowing the governments to tap into the private sector's expertise and resources, and reduce risk for the government
- Clarity is needed on the future operational model of the project



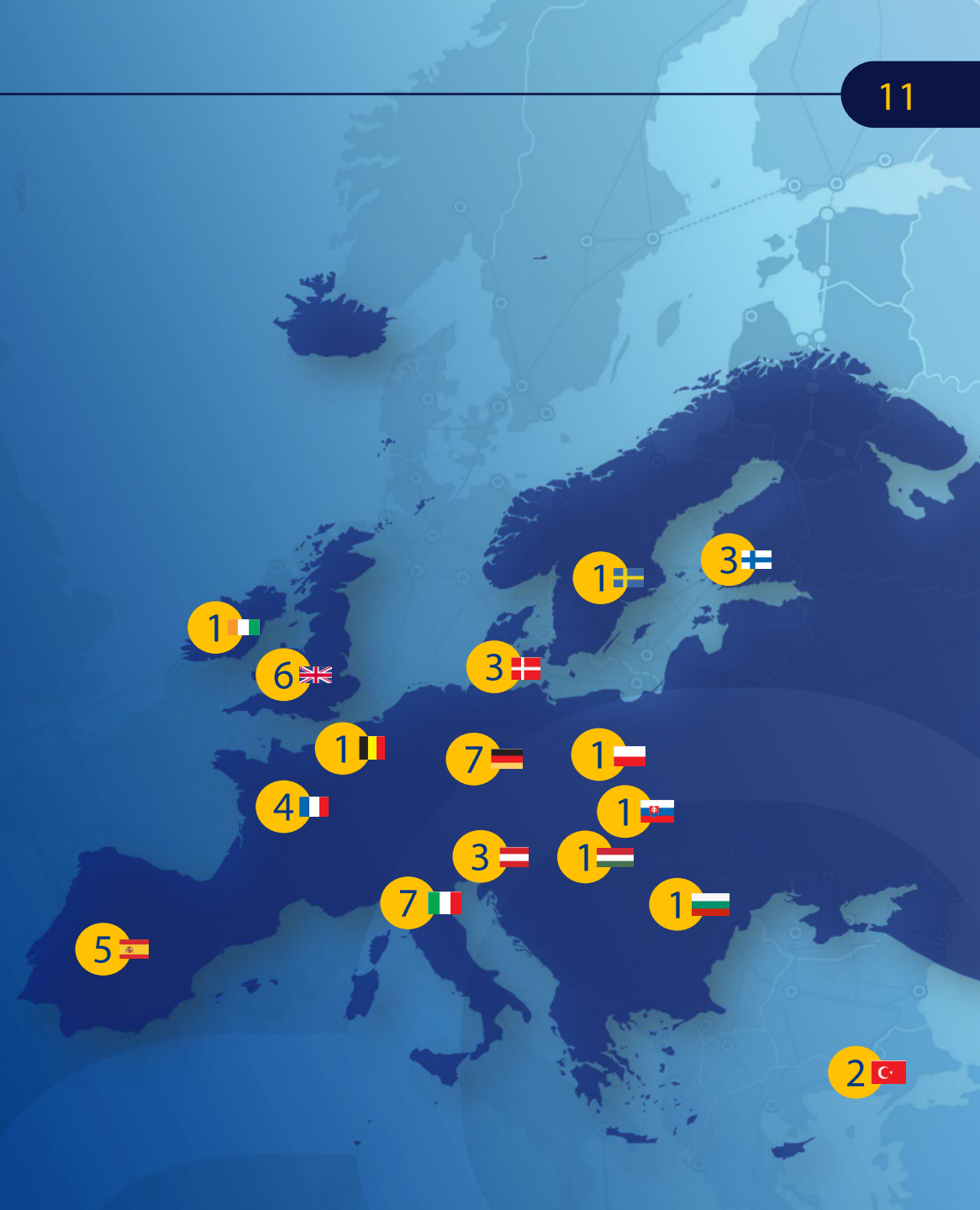
Fin. institutions Credits and guarantees

International Financial Institutions provide credit and equity funding as well as guarantees for railway projects

Cooperations & International Suppliers

Around 300 partnerships with Baltic and EU companies

Austria	  
Belgium	
Bulgaria	
Denmark	  
Finland	  
France	    
Germany	       
Hungary	
Ireland	
Italy	    
Poland	 
Slovakia	 
Spain	    
Sweden	
Turkey	 
U.K.	     



> 4.7bn EUR of suppliers' contracts signed



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Thank you!

www.railbaltica.org