

Overview 2025

Development of the Austrian Railway Market

Passenger Transport

In 2025, Austrian rail passenger transport developed positively once again, albeit with altered dynamics compared to the previous year. While the supply volume reached another record value at 138.9 million train-kilometers (minimally higher than 2024), the number of passengers declined slightly. With a total of 347.5 million travelers, the figure was just below the 2024 level (decline of approximately 0.3 percent, or two percent for ÖBB Personenverkehr). This is primarily due to a decline in local/regional transport, influenced by a two-month summer closure of the Vienna S-Bahn main line. In long-distance transport, however, passenger numbers rose again (+1%). In passenger transport, ÖBB-competitors were able to increase their shares and carried a total of nearly 16 percent of travelers.

Despite the slight decline in the number of passengers, the total distance traveled increased by 0.7 percent to 15.1 billion passenger-kilometers. The average journey length per passenger thus rose to 43.4 kilometers.

Market offerings were slightly expanded again in 2025. Stabilizing the timetable was the focus. Nevertheless, important new connections were introduced and capacities expanded: the deployment of new IC double-decker trains (acquired from DB) as well as year-round new services from Prague via Vienna to Budapest by RegioJet. A significant infrastructure event was the full commissioning of the Koralmtunnel in December 2025, although its full impact on passenger numbers is expected only from 2026 onwards.

Rail-Freight Transport

In rail freight transport, the market-performance increased by nearly five percent in net and gross tonne-kilometers in 2025. Following a significant decline in 2023, transported net tonnes recorded their second consecutive year of slight growth at 117.6 million tonnes. This positive development is partly due to route-detour-induced longer journeys in Austria.

Rail Cargo Austria's market share in 2025 amounted to around 52 percent of net tonne-kilometers — another decline compared to previous years. Ranked second were private railway companies (including CargoServ, ecco-rail, Lokomotion) with a total of approximately 29 percent market-share. The overall market share of all competitors approached the 50-percent mark and stood at approximately 48 percent.

On major transit axes, competitors dominated rail freight transport: On the Brenner and Western axes, they achieved over 60 percent market share each in gross tonne-kilometers.

On one hand, growing competition revitalized the market; on the other hand, the performance capacity of rail freight transport could not be substantially improved in multi-year comparison. Besides the economically strained situation, track closures due to construction sites also held back freight traffic. Comprehensive construction work on international corridors, particularly major renovations in the German network and the closure of the Tauernbahn led to extensive detours with much longer routes for freight services. The resulting higher costs reduce its competitiveness and intensify the shift pressure toward road transport — especially for individual wagon and combined transport, which compete directly with truck transport.

More than a quarter of all freight transport performance was provided in 2025 through short-notice ad-hoc paths — among private competitors even over 40 percent. The volatility of rail freight transport and its need for paths outside the annual timetable continues to increase. It becomes clear that rail freight transport urgently requires better path planning predictability, particularly in connection with construction site coordination.

Developments in the Railway Market

At the end of 2025, there were 98 railway companies active in Austria — eleven new ones were added compared to the previous year:

- **Altmann Rail Traction** (Freight transport – predominantly automotive sector, DE)
- **CER Austria Cargo GmbH** (Freight transport, AT)
- **Compagnia Ferroviaria Italiana** (Freight transport, IT)
- **CO Schweisstechnik** (Track construction and rail processing, DE)
- **dispo-Tf Rail Austria** (Predominantly personnel service provider, AT)
- **Medway Italia** (Freight transport, part of MSC logistics group, IT)
- **Pro-Lok** (corporate consulting/leasing of rail vehicles, AT)
- **Rail Traction Company** (Freight transport, IT)
- **Smart Rail** (Freight transport, DE)
- **StB Cargo Germany** (Freight transport, DE)
- **Steiermärkische Landesbahnen** (Freight operations on own network, AT)

A total of 74 companies were authorized to use the ÖBB network during the reporting year. Of these, four belong to the ÖBB Group, nine are majority-controlled by foreign market leaders, thirteen are publicly owned, and 48 are privately owned.

Price Development of Railways

The Austrian long-distance transport market in 2025 continued to be characterized by competition between ÖBB Passenger Transport, Westbahn, and RegioJet. Generally, it applied again: the earlier tickets are purchased, the lower the prices — with savings of over 70 percent compared to the standard fare when booking early. Passengers benefited most on the ÖBB route Vienna–Prag (average 70.4 percent savings) and with Westbahn on the Vienna–Munich connection (56.5 percent). Compared to the previous year, however, ticket prices had risen in most cases — with Westbahn in 93.3 percent, with RegioJet in 90 percent, and with ÖBB in 80 percent of the examined purchase points. In direct route comparison, RegioJet remained consistently cheaper than ÖBB on the Vienna–Prag and Vienna–Budapest routes; on the western axis (Vienna–Linz, Vienna–Salzburg, Vienna–Munich), ÖBB-PV and Westbahn each offered the lower price in approximately half of the cases.

With ÖBB night trains, the trend toward contingent, occupancy-driven pricing continued. Twelve weeks before departure, prices were lowest across all comfort categories. Year-over-year, prices decreased at 58 percent of examined purchase points but increased at 40 percent.

The Klimaticket Austria continued to enjoy great popularity but experienced two price increases within a few months in 2025: from €1,179.30 (March 2025) to €1,400 starting January 2026 — an increase of 19 percent. Most regional Climate Tickets were also adjusted at the start of 2026, with increases of up to 28 percent (annual card Vienna). While the Vienna increase was considerable at 28 percent, it represented the first adjustment since 2012. For cross-border travel, the Climate Ticket Austria is only valid at certain border stations — such as to Germany, Italy, and Switzerland — while it does not apply to Czech, Slovak, and Slovenian border stations.

Access to the Austrian Railway Market

New Developments in the Railway Network 2025

In 2025, the Austrian rail network grew by 17 kilometers to a total of 5,638 kilometers — an expansion mainly attributable to the full commissioning of the Koralmbahn route between Graz and Klagenfurt. With this gap closure, a continuously double-tracked connection is now available, though its full potential impact on passenger figures for long-distance and local transport will only become fully visible from 2026 onwards.

Other infrastructure projects included the electrification of feeder routes to the Cargo Center Graz and the Wettmannstätten–Wies-Eibiswald route. The overall proportion of electrified routes in Austria was around 76 percent; additionally, at the beginning of 2025, further projects were initiated with the Mattersburgbahn and Traisentalbahn. At the same time, one route cancellation occurred: the connection Bruck an der Leitha–Petronell-Carnuntum was decommissioned at the end of 2025.

Network burden from construction work increased compared to the previous year: there were 126 multi-day construction sites leading to capacity restrictions of over 30 percent (compared to 115 in 2024), with average closure duration at 126 hours. Longer closures of more than three weeks nearly doubled.

As part of ÖBB Infrastructure AG's modernization program, numerous stations were made barrier-free (including Dorfgastein, Bad Gastein, Bludenz) and new stops opened or relocated, while a few old stations were closed. There was also cross-border progress in the railway network, particularly through the full commissioning of the electrified connection between Marchegg and Devínska Nová Ves in Slovakia.

Punctuality in Rail Transport 2025

Punctuality in Austrian passenger transport improved in 2025 to an average level of 94.1 percent (measured from a delay of 5 minutes and 29 seconds onwards). The basis for punctuality statistics comprises the total of 22.1 million arrivals of all passenger trains at all traffic stations of ÖBB Infrastructure. Local transport with 94.8 percent punctuality continued to significantly outperform long-distance transport, which despite slight improvement to 81.4 percent has room for improvement due to international networking and construction sites. Particularly critical were cross-border trains from Germany, Italy, and Hungary; for example, less than one in three trains from Nuremberg arrived punctually at the border station Passau. Westbahn performed relatively well in long-distance transport with a punctuality of 85.7 percent.

Main causes for delays in overall passenger transport showed problems of the railway undertakings themselves (29%, e.g., vehicle defects) as well as infrastructure failures (24%). In long-distance transport, disturbances by neighboring railways dominated (34%) as the cause of delays.

New Developments in Service Facilities and Connecting Lines

The number of traffic stations in the Austrian rail network totaled 1,435 in the reporting year, of which 1,053 were operated by ÖBB Infrastructure. Expansion of digital infrastructure continued: 125 stations now have public WLAN (seven more than the previous year), while the number of train-run checkpoint locations increased to 199. This represents an important step toward improving operational safety supervision. At the same time, several long-standing trends were confirmed: the number of pre-heating plants further declined to 40, while washing and cleaning facilities increased from eleven to fifteen, including those with new graffiti treatment possibilities.

For connecting lines, a slightly declining picture emerged: of the 930 accessible rail connections, only 488 were actually served (minus six compared to 2024). With 1.16 million freight wagons submitted, total volume decreased by 1.2 percent. Nevertheless, half of all turnover is accounted for by only 16 companies — headed by voestalpine Linz with over 180,000 wagons, followed by voestalpine Donawitz, Linz Service GmbH, and

the Enns Harbor. The City Harbor Linz remains with 20 connecting lines the most densely connected station in Austria.

Focus Areas of the Schienen-Control Commission Work

The Schienen-Control Commission opened proceedings in the reporting year 2025 in the areas of railway electricity, access to railway infrastructure, service facilities and services, as well as fees and path charges.

Proceedings pursuant to § 68a EisebG (Electricity, Stations, IBE)

The Schienen-Control Commission examined over several years the legality of fees by a railway infrastructure undertaking for access to infrastructure, station usage, and railway electricity. After the company sought negotiations under § 68a EisebG in 2024, agreements were reached under official supervision that established legal peace between the parties involved.

Due to the subsequently submitted amended terms of use, the Schienen-Control Commission initiated its own competition monitoring proceedings and issued decisions that resulted in considerable tariff reductions. Thus, a total of around €164.7 million was refunded to railway undertakings. Pending old proceedings were subsequently discontinued and several previous decisions became legally binding.

Railway Electricity

The operator of the railway electricity network in Austria updated tariffs for using the railway electricity network with new drafts of its rail network usage conditions (status: November 2024). The Schienen-Control Commission examined these updated tariffs within officially initiated competition monitoring proceedings. The Schienen-Control Commission issued decisions in these proceedings determining that the amended tariffs comply with legal requirements.

Access

Path Rejection

A railway undertaking filed a complaint with the Schienen-Control Commission because the railway infrastructure undertaking had rejected an ad-hoc path ordered by it. The infrastructure undertaking indicated that the application was incomplete and therefore could not be processed. The Schienen-Control Commission requested the railway infrastructure undertaking henceforth to decide on all path requests submitted in the form stated in the rail network usage conditions. The infrastructure undertaking subsequently intended to train its personnel accordingly.

Maintenance Windows

A railway infrastructure undertaking has been carrying out maintenance work on some single-track routes since the net timetable period 2026 not in train pauses but in

reserved time windows. The Schienen-Control Commission initiated a competition monitoring proceeding and questioned the railway infrastructure undertaking about the reasons for this changeover as well as consideration of passenger transport interests. The Schienen-Control Commission monitors the implementation of the maintenance windows and the evaluation announced by the railway infrastructure undertaking.

Service Facilities

Locations for Ticket Sales

A railway undertaking turned to the Schienen-Control Commission requesting access to locations for ticket sales at Vienna Hbf., Vienna Meidling, and Graz Hbf. During an oral hearing, a solution could be found regarding all locations, and subsequently access to the desired sales locations was granted.

IBE

Electronic Order

A railway undertaking brought a complaint with the Schienen-Control Commission regarding a software application of an infrastructure operator for displaying and acknowledging the electronic order. The complainant argued among other things that the software application was part of the minimum access package and therefore must be made available to railway undertakings without additional costs. The Schienen-Control Commission dismissed the complaint. It justified this by stating that the ZFM interface (= electronic train journey management) provided by the infrastructure operator is the fundamental "source" of information to be provided. Information required for the execution or operation of the railway transport service for which route capacity was allocated belongs to the minimum access package.

International Cooperation

The Schienen-Control is actively involved in European cooperation of railway regulatory authorities and participates particularly in networks such as IRG-Rail, ENRRB, and SERAF to coordinate regulatory issues and contribute to the EU legislative process. IRG-Rail stands at the center as the most important cooperation forum of regulatory authorities (31 members), promoting exchange of best practices through working groups, reports, and regular plenary meetings and developing joint positions vis-à-vis EU institutions.

In 2025, a focus was placed on preparing the new EU Capacity Regulation, strengthening cooperation, and stakeholder involvement. Substantively, working groups dealt with among others network access, fee systems, market observation, service facilities, and new legislative initiatives, with topics such as capacity management, competitive conditions, data availability, and infrastructure efficiency in the spotlight.

In addition, ENRRB and SERAF serve as platforms for coordination, information exchange, and involving market actors, for example in further developing the European legal framework, digital mobility solutions, and infrastructure fees.