

Position Paper

Gdansk, 22 September 2025

Ticketing Package

Key messages

- **Improving international ticketing is a priority for the sector** - Booking rail tickets is found easy for almost 75% of European citizens is a priority for the sector. A 2025 Eurobarometer survey on MDMS revealed that most European citizens have a positive experience when booking rail and multimodal journeys, thus showing consistent improvement in satisfaction with rail booking and ticketing in recent years. CER members are delivering on the 2021 CER Ticketing Roadmap's commitments, ensuring a smoother and more seamless booking and travel experience for the passengers.
- **Achieving a modal shift to rail requires levelling the playing field between transport modes and making rail transport both more affordable and faster – as price and speed remain the main factors influencing passengers' mobility choices** – The main tools to achieve this include expanding infrastructure capacity, developing multimodal hubs and promoting interoperability of the sales inventories, while avoiding initiatives that could increase ticket price. This objective should always be regarded when designing ancillary policies, like the Single Digital Booking and Ticketing Regulation (SDBTR).
- **Extending the application of all measures of the package to all modes is the only way to ensure fairness across modes, sustain the modal shift goals and promote multimodality in the consumption choices of Europeans** – Rail should not be discriminated against other transport modes. Widening the scope to all long-distance modes would further improve the booking of multimodal trips, and produce key data on modes' substitutability. Displaying GHG emissions should also be mandatory to ensure consumer awareness of each journey's environmental impact.
- **Ensuring the autonomy of railway undertakings in choosing their commercial partners according to their business strategies is essential to boost the competitiveness of rail with other modes** – Businesses must be able to choose their partners for ticket distribution, including MDMS platforms or direct competitors, freely (as it's the case for other modes). Their marketing strategies and commission fees should not be overregulated by additional legal framework. This is essential to boost the competitiveness and affordability of rail with other modes, and avoid the creation of gatekeepers, whose relevance in other sectors is cause of widespread concern. Further, gatekeepers would crowd out public investment from the railway sector, making investments in the customer journey and infrastructure less likely. Withholding this right would be an unprecedented distortion of market rules.
- **Avoid additional costs and a crowding out of resources for the railway system** - Imposing heavy constraints on railway undertakings like higher distribution fees or unnecessary IT development costs should be absolutely avoided. Measures that result in diverting investments away from the railway system, which typically operates with low profit margins, are detrimental to the EU sustainability goals, as they could negatively affect the quality and prices of rail offers.
- **Responsibility for passengers' rights to MDMS and railway undertakings should be attributed fairly and proportionately** – Independent MDMS platforms should be liable and responsible for passengers' assistance in case of journey disruption where the multi-operator trip is unilaterally arranged by them and not created by operators. To keep ticket prices reasonable and make journey planning easy for passengers, it's important to have balanced compensation rules. This will help ensure that companies don't reduce multi-operator offers or raise prices sharply to protect themselves from unfair or excessive risk. The longer an international train journey, involving several

railway undertakings, the higher the risk of delays and thus compensation payments - this can make selling pan-European connections economically unviable. Hence, balanced compensation rules and proportionate liability standards for MDMS are essential to prevent the failure of this upgrade.

- **To increase the distribution of international offers on operators' platforms, it is essential to first reduce the cost of inventory interoperability.** Connecting platforms is currently an expensive process, for a low income from distribution of international offers. The OSDM standard (open sales and distribution model), will allow operators and ticket vendors to better connect different inventories and therefore to offer a wider offer to passengers. The European Commission should promote this initiative and give it time to spread among rail companies, as its implementation is much less costly for the rail sector.
- **No market failure has ever been proven in the rail sector in terms of distribution.** Forcing incumbent operators to sell their competitors' offers, or to conclude distribution agreements, is therefore disproportionate in comparison to the objectives of the regulations. European law, and the consistent actions of regulators thereof, already ensure that incumbent operators distribute their data fairly and enter into negotiations with other distributors, effectively upholding fair competition.

1. Introduction

According to Eurobarometer's 2025 study on Multimodal Digital Mobility Services (MDMS)¹, almost 75% of European passengers found booking tickets for journeys with multiple operators easy. Since 2021, European railway undertakings are working hard to improve the experience of passengers within the existing legal framework and have already achieved tangible results with the implementation of CER's Ticketing Roadmap². Thanks to the Open Sales and Distribution Model (OSDM) for example, passengers can easily book journeys with several railways in a single transaction, and in many cases choose the fare-mix that suits their needs best. Booking an international or cross-border rail journey with several providers is becoming as easy as buying a ticket for a domestic connection or an international flight. The first implementations of OSDM have already gone live for customers, with more and more to follow in the upcoming months. And if during the journey a connection is missed passengers can reach their destination at no additional cost – thanks to the Agreements on Journey Continuation (AJC), a voluntary agreement between 23 European railways.

The Roadmap underscores the concrete commitment of railway undertakings to constantly enhance customers' travel experience on rail services. Additionally, the objectives of CER members for the near future include not only a push for a modal shift to rail for passengers, but also increased opportunities for multimodal trips, with rail providing the backbone of intra-European travel, specifically on distances up to 1000 kilometres.

As European travellers identify speed and affordability as the main variables determining their travel choices, CER emphasizes the importance of policy interventions to make rail journeys faster and more affordable. In particular, infrastructure investments to increase capacity and improve reliability, faster deployment of ERTMS, alignment of technical requirements, reducing costs of rolling stock through EU-wide technical harmonization and modularity, levelling the playing field with other modes and reducing bureaucracy where possible are seen as the top priorities to deliver improvements in terms of travel times and affordability and trigger a substantial modal shift to rail.

The MDMS/SDBTR proposal must guarantee a fair business environment for all market participants as well as safeguard passengers and their rights. In this context, regulatory interventions should be designed to encourage innovation to make rail transport even more attractive and refrain from crowding out resources that are needed to deliver on important investments, like TEN-T, rolling stock and passenger facilities.

This paper outlines the position of CER members with respect to the announced Commission proposals on MDMS, SDBTR and targeted revision of the Rail Passenger Rights Regulation. Notably, this paper is meant to complement the position of members already published in February 2023 with CER's position paper on the Multimodal Digital Mobility Services Initiative.

2. Inclusion of all modes of transport in the regulation is essential to promote modal shift

The rail distribution market is growing, also with the help of new technologies and innovations. Aside from the platforms that are vertically integrated within operators,

¹Eurobarometer Multimodal Digital Mobility Service Survey April 2025
<https://europa.eu/eurobarometer/surveys/detail/3178>

²CER Ticketing Roadmap September 2021 <https://www.cer.be/cer-eu-projects-initiatives/cer-ticketing-roadmap>

independent Vertical Search Services, like online sales platforms, have appeared on the market. Moreover, independent platforms have increasingly become a reference point for users to compare offers and orient themselves in new countries and markets, similar to what happens in the aviation sector.

Nevertheless, the proposed regulation on the matter, namely, to mandate commercial relations between operators and independent platforms, targets the rail sector only. In designing this sector specific legislation, the European Commission misses a valuable chance to address challenges in other modes of transport, aviation above all. Amid the consolidation of the European aviation market, there is evidence of concerns raised by EU and national competition authorities over emerging monopolies on specific routes, predatory pricing practices and even unfair relations with MDMS, which work to the detriment of passengers and their rights.

Furthermore, independent ticketing platforms are in most cases not truly multimodal; they either focus on air travel, packaged tours and related ancillaries, or they provide rail and ground transportation services only. Truly multimodal platforms connecting air and rail seamlessly rarely exist. Therefore, the inclusion of all long-distance and regional modes of transport is a key step in the interest of all concerned passengers to secure a contribution of the SDBTR regulation in addressing concerns across all modes of transport.

Hence, a monomodal regulation, where only rail operators are mandated to cooperate with independent platforms, without the same obligation for other modes would not help promote multimodality. Instead, it would just impose additional costs on the rail industry and widen the competitiveness gap with competing modes, further tilting the level playing field.

CER members strongly believe that including all modes of transport in the framework of the regulation would contribute to levelling the playing field among modes of transport and help the passenger along the whole travel chain. Moreover, it would be a unique system to generate essential data on modes' substitutability, which would be key to understanding how to shape future transport policies.

3. Preserving the right of all stakeholders to enter into commercial agreements is essential to prevent any increase in ticket prices

It is crucial for CER members that companies retain the right to enter into individual commercial agreements with potential partners, including independent ticketing platforms. CER members value the existing rules and principles concerning competition and market access and agree that no actor should be discriminated against with respect to the application of these principles.

Furthermore, as much as the right to freely enter in agreements with platforms, the level of remuneration paid to platforms must remain the result of individual negotiations between the parties and not defined by law. Imposing regulated commission fees risks increasing distribution costs, as vendors seek higher commissions, ultimately inflating ticket prices without added passenger benefit. Already today, there are situations in the aviation sector where intermediaries earn more per passenger than the air carriers themselves. This kind of distortion must be avoided in both the rail and wider mobility sector. Ensuring fair ticket prices is essential to safeguard the capacity of railway undertakings to reinvest in the sector—whether in modern rolling stock, the development of new routes, or the enhancement of ticketing platforms—thereby strengthening the long-term competitiveness and sustainability of European rail.

Effective regulation should safeguard revenue shares that are proportional to each value chain actor's contribution (e.g., railway undertakings' responsibilities for connections, operations, ticket offers, and inventory maintenance) without permitting ticket prices to rise for negligible added customer value. The platformization we see in other sectors (e.g. hospitality³) has also brought a phenomenon of platforms acting as gatekeepers and being able to charge disproportionate distribution fees to the businesses present on their platforms. This means that they can directly impact prices, if not influence who can be admitted to the wider digital booking network.

Preventing the rise of EU wide gatekeepers in the transport sector is key to promote the affordability of train travel, the financial sustainability of railway undertakings and ultimately their ability to reinvest into more modern rolling stock.

Any increase in distribution fees deriving from a mandatory engagement with independent platforms or a regulation of the fees themselves would lead to higher prices for consumers or a further decrease of profit for the operators in an already low margin market, leading to lower competitiveness, appeal of rail travel and investments, eventually causing an overall decline in the attractiveness of the railway system and number of connections offered. At a time of significant budgetary constraints, the rail sector would not be able, nor find economically reasonable, to fully absorb the increased costs of the measure to preserve stable prices in the interest of consumers. As a modal shift to rail remains a key pillar of the EU's efforts to deliver on the green transition, driving a crowd-out of resources and reducing its commercial appeal is a move in direct contrast with the EU's stated objective.

In addition, this move would be positioned in direct contradiction with both the guidelines of the 4th Railway Package and, more recently, with the President Von der Leyen's Political Guidelines for the 2024-2029 term which set deregulation as a goal to sustain competitiveness and a clear, investment-friendly business environment.

4. Cooperation between competing railways and/or online platforms must be economically fair

CER members believe that the proposal to mandate the sale of competitors' products violates a company's basic freedom to design its business strategy, unseen in any other mode of transport or any sector in the EU. It shall not be overlooked that European antitrust and competition laws already sufficiently ensure the fair treatment of competitors across all industries. All in all, in thriving digital markets, regulators should be wary of taking measures that would likely slow development and innovation. If railway undertakings were forced to align their offering with specialised independent platforms, thereby eliminating any product differentiation, this would at least significantly reduce, if not completely prevent, mutual competition for innovation in the interest of passengers.

Notably, independent MDMS too did not stress any urgency to have railway undertakings selling each other's tickets. Instead, they also called for all modes of transport to be

³ Recently, over 10,000 hotels joined the pan-European initiative against Booking.com's use of illegal 'best price' (parity) clauses, alleging that "best price" pledges were extracted from hotels under huge pressure not to offer rooms at lower prices on other platforms, including their own websites. As they gained control of the market, Booking was able to increase its commission rates and exert much greater pressure on hoteliers' margins. The Digital Markets Act (DMA) shall consider these developments to prevent anti-competitive practices but also avoid the creation of new ones.

included in the SDBTR regulation (EU Travel Tech, 2025⁴). The regulation has the chance to make independent platforms a key tool to enhance the supply of intermodal travel bundles and effectively contribute to a sustainability-oriented modal shift on those routes where flights and train rides could be easily mutually substitutable. Nonetheless, commercial agreements between the parties should be the precondition for the creation of the intermodal travel bundles.

Mandating the sale of competitors' products would also carry substantial technical complexities, which could be overcome only with significant investments, and, once again, higher prices for consumers in exchange for minimal benefits, as independent platforms already fulfil this function. Such an obligation would also create a distortion of competition between vertically integrated MDMS and independent platforms. Independent platforms could selectively sell only the most profitable journeys, while incumbent operators would have to bear the costly implementation of interoperable ticketing systems. Furthermore, transition and integration costs should be borne by the party with the interest and intention to pursue it.

To improve the distribution of transport offers, legislators should focus first on reducing the fragmentation of the distribution system and the cost of implementing interoperable ticketing systems. To do so, standards for systems interoperability must be implemented. The OSDM standard already allows distributors and operators to sell a wide range of fares from their partners beyond rail offers alone, and is supported by the sector as it has been developed through the concentration of operators, distributors and information system providers. This open-source standard currently represents the main solution to address one of the main challenges of the sector, the connection of different inventories, and should therefore be promoted by the legislators.

5. Passengers' rights

CER members have long proved a strong commitment to safeguard passengers' rights and ensure a smooth experience from booking to destination. Hence, the current stated aims of the Commission to give obligation for through-tickets raise concerns for CER members with respect to two key points: the liability of independent MDMS when they unilaterally aggregate tickets and the extent of legal obligation of through-tickets for all multi-operator tickets.

On the first point, any regulations must include provisions to make independent MDMS fully liable and responsible for passenger rights including by assisting those facing disruptions when the platforms unilaterally created the multi-operator journey bundle without any commercial agreements with the operators instead of offering one agreed upon and arranged by the operators themselves. This need stems from the lack of awareness and control by operators about the existence of purchased connections they did not offer nor agreed to offer and for which they should not be liable.

On the second point, CER members stress the importance of attributing proportionate and reasonable liability to operators causing disruptions within multi-operator journeys. As per the current Rail Passenger Rights Regulation, the single operator causing a disruption is liable. The high risks carried by the extension of legal obligation of through-tickets to all multi-operator tickets, especially for operators responsible for minor legs of the trip and with so many variables out of each operator's control, would induce operators to stop offering these trips due to the prohibitive costs of potential compensation, resulting in a

⁴ <https://eutravelttech.eu/eu-travel-tech-position-paper-multimodal-digital-mobility-services/>

reduction of the passenger offer. Neither of the two scenarios is consistent with the EU's and CER's long-term objectives of driving more people onto rail for cheaper, faster and more far-reaching connections by ensuring journey continuation for passengers in case of disruption.

Rather than extending the scope of application of "through tickets", CER recommends considering as a basis for improvements to the current regulatory framework the CIT Agreement on Journey Continuation (AJC), for international multi-operator journeys. For this kind of journeys, the Rail Passenger Rights Regulation could take as reference the Multimodal Passenger Rights proposal, allowing operators to offer "combined" tickets – namely two or more separate contracts sold in a single transaction – which would be covered by a protection framework based on the current mechanism of the AJC. This solution would allow operators to ensure journey continuation on international travels, thus enabling passengers to reach their final destination while ensuring liability costs are kept at a minimum. An upgrade to the regulatory framework inspired by the AJC would further strengthen passenger protection.

To summarize, the approach proposed by CER members reflects the following scheme:

- Separate tickets, i.e. sold as separate contracts in separate transactions. It would not foresee any guarantees regarding journey continuation.
- Combined tickets, i.e. framework applicable exclusively to international journeys, when tickets are sold as separate contracts in one single transaction. A mechanism based on the current functioning of the CIT AJC would guarantee the journey continuation.
- Through tickets, i.e. single contract sold in a single transaction. The current liability scheme as set out in the Rail Passenger Rights Regulation would apply.

This would mean that operators would still be able to sell through-tickets, two or more contracts with one transaction or fully separate tickets with several transactions, where that makes business sense. Beyond this, CER members warn against the risks of overregulation, which would be detrimental to clarity, policy consistency and the goal of cutting red tape.

6. Conclusion

In conclusion, CER members highlight the need to ensure the regulation's effectiveness and compatibility to level the playing field for different modes of transport. Some consideration would help avoid potential distortionary effects on ticketing markets. These outcomes would be essential to boost competitiveness and contribute to the attainment of long-term environmental goals. To that end, CER urges the Commission to intervene and apply SDBTR to all modes of transport. Also, in the view of the announced MDMS, CER stresses the importance of preserving the right of firms to enter into commercial agreements freely and recognize the requirement of economic justifiability in a firm's own selection of business cooperations. Independent platforms need to be attributed their responsibility over product bundles created by them and not by or in agreement with operators. Lastly, the risks for operators must be mitigated by adopting a proportionate responsibility scheme for multi-operator journeys.

CER members remain fully committed to providing the best possible service to European rail passengers and urge the Commission to address the points of concern raised in this paper. CER is happy to work together with the Commission to improve the passenger experience for multimodal journeys. At the same time, CER members invite the Commission to promptly act on further issues hindering the progression of a modal shift

to rail compatible with the EU's Green Deal goals, enabled mostly by measures to enhance speed and affordability of services.

About CER

The Community of European Railway and Infrastructure Companies (CER) brings together railway undertakings, their national associations as well as infrastructure managers and vehicle leasing companies. The membership is made up of long-established bodies, new entrants and both private and public enterprises, representing 78% of the rail network length, 81% of the rail freight business and about 94% of rail passenger operations in EU, EFTA and EU accession countries. CER represents the interests of its members towards EU policy makers and transport stakeholders, advocating rail as the backbone of a competitive and sustainable transport system in Europe. For more information, visit www.cer.be or follow us on Twitter [@CER_railways](https://twitter.com/CER_railways) or [LinkedIn](https://www.linkedin.com/company/cer).

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