

Dominant digital platforms and higher ticket prices: the hidden side effects of the EU's new rail ticketing legislation

The European Commission today published a new Passenger Package promising one-click, single-ticket bookings and unconditional passenger rights for multi-segment rail journeys across Europe. Underneath the surface of this rosy vision, lies unprecedented and unjustified regulatory interventionism. The Community of European Railway and Infrastructure Companies (CER) strongly cautions against the proposal's mandatory distribution requirements and heavy burden of liability on railways. While profit-driven digital platforms get free reign to dominate ticket sales, railways will be left carrying the real cost and responsibility with inevitable repercussions on ticket prices.

The European rail ticketing market is evolving positively and largely meets customer expectation. According to a recent [Eurobarometer survey](#), 73% of European citizens surveyed who had attempted to book two or more connecting trains run by different operators found the process to be easy. Even so, railways have been working hard the last few years to deliver further improvements and make it even easier to buy rail tickets online. The Open Sales and Distribution Model (OSDM), for example, is an IT standard for seamless ticketing data exchange developed by the rail sector and made available to all ticket vendors. International digital rail ticket sales have increased significantly (by as much as 75% in Germany), from the beginning of 2026 versus 2025, thanks to the implementation of OSDM. At the same time, new ticket vendors are entering the market in growing numbers.

Against this backdrop, CER questions the necessity of heavy-handed regulatory intervention usually reserved for evidenced market failure. The European Commission's own Regulatory Scrutiny Board challenges the existence of any such evidence in this case. It has also highlighted weak cost-benefit analysis. Unprecedented in any other sector, the proposed legislation is inconsistent not only with the European market economy but also with the EU's current simplification drive and with core principles at the heart of its Digital Markets Act.

Several aspects of the Commission's Single Digital Booking and Ticketing Regulation (SDBTR) proposal prove particularly problematic:

- Forcing major railway companies into **mandatory distribution agreements with all requesting digital platforms** removes leeway from railways in commercial negotiations. This could lead to unhealthy concentration of market power with dominant platform gatekeepers able to dictate higher distribution fees and drive-up ticket prices. This is precisely the outcome that EU competition policy, including the Digital Markets Act, seeks to prevent. The UK government meanwhile is unwinding such provisions for these exact reasons.
- **Mandatory distribution obligations for railways to sell competitors' products** directly impacts the commercial freedom and entrepreneurial autonomy of operators, disincentivising innovation. If a company sees that investing in an advanced booking

tool will benefit its competitors rather than give itself a competitive edge, it will think twice before making the investment.

- **Regulated commission fee levels** for distribution through third-party vendors will only stifle innovation further and introduce rigidity into a currently dynamic market.

Critically, the **SDBTR obligations will be compounded by the targeted revision of Rail Passenger Rights**, where the Commission is seeking that every multi-leg rail journey be sold as a single ticket known in the industry as a 'through-ticket'. This raises important liability questions in the event of journey disruptions, especially in cases involving competing operators and other modes of transport. Placing the full responsibility on railway undertakings fails to recognise that this higher exposure to risk cannot be absorbed by railway's low profit margins. To minimise the knock-on effect on ticket prices, liability must reside with the seller of the tickets and not the operators.

All these measures **ignore the fundamental commercial realities** of rail operations by contrast to independent ticket vendors. While the latter enjoy limited responsibility and very high gross margins (with revenues often flowing out of Europe), railways operate on very low gross margins, bearing the full cost of travel provision and reinvesting their slim profits into passenger services.

The conspicuous **absence of aviation** from the Commission's proposals is also puzzling given its stated aim of making it easier to compare all available travel options and identify the most sustainable choices. It further deepens the unlevel playing field between the two transport modes and undermines the credibility and fairness of the Commission's multimodal ambitions.

In short, the Commission's well-meaning proposal may in fact:

- Empower dominant (mainly non-European) digital platforms
- Increase ticket prices
- Undermine railway initiative and investment
- Give airlines a competitive advantage

CER calls on the European Parliament and Council to carefully scrutinise the Passenger Package during the co-decision process. CER is ready to engage constructively and to work toward solutions that genuinely serve passengers, support innovation, and respect the commercial realities of a competitive market. Regulation should enable, not constrain, the sector's ongoing transformation.

CER Executive Director Alberto Mazzola said: *"Today's proposals favour big digital platforms, risk increasing ticket prices, undermine railways' investments in innovation and set aviation apart rather than promoting fair competition. Sector-led transformations in rail ticketing are delivering tangible results for passengers according to the clear path set out in the CER Ticketing Roadmap. Just 5 years on, we see more rail ticket vendors, better integration, and higher cross-border ticket sales than ever before. We share the Commission's vision of seamless travel. But regulation will not help achieve that vision any faster than the sector's own initiative and risks creating the very problems it intends to solve. Rather than fostering competition and innovation, mandatory distribution obligations and fixed commission fee structures could entrench platform gatekeepers, limit entrepreneurial freedom, and ultimately harm passengers through higher prices."*

About the CER Ticketing Roadmap

The European railway sector fully supports the Commission's aim of simplifying rail travel booking and enhancing passenger protection. To deliver on this goal, railways have been working hard the last few years to implement the 2021 CER Ticketing Roadmap, developing technical innovations, addressing fare harmonisation issues, and endorsing a passenger care framework known as the CIT Agreement on Journey Continuation (AJC). Thanks to these sector-led efforts and multi-million-euro investments by rail companies, rail passengers are already seeing tangible improvements including more tickets available online than ever before, the possibility to book them further in advance, and a 90% coverage of European rail passenger traffic by the AJC.

More information available [here](#).

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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 diverse and comprehensive membership made up of long-established bodies, new entrants and both private and public enterprises, covers the large majority of the rail infrastructure network, rail freight business and 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 resilient, competitive, and sustainable transport system in Europe. For more information, visit www.cer.be or follow us on social media.