



ALLRAIL

The Future of Passenger Rail



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POSITION PAPER

Rail Ticketing Regulation and the Regulation on Multimodal Bookings

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ALLRAIL is the non-profit association representing independent passenger railway companies, working to support a more open, attractive and passenger-focused rail market across Europe, for the benefit of travellers and taxpayers.



Executive Summary

ALLRAIL welcomes the European Commission's Passenger Package and its ambition to create a more competitive, transparent and passenger-friendly ticketing market. In particular, the proposed Rail Ticketing Regulation (RTR) represents an important step towards opening up rail distribution and addressing the structural advantages enjoyed by dominant, vertically integrated railway operators.

Part 1 – Rail Ticketing Regulation (RTR)

ALLRAIL strongly supports the proposed hosting and sharing obligations, which are essential to ensuring effective competition in passenger rail distribution.

- ▶ Strengthen the hosting obligation with a clear prohibition of self-preferencing. Indispensable vertically integrated ticketing platforms must not favour their own railway services over those of competing operators.
- ▶ Ensure effective and reciprocal market opening through hosting and sharing. Independent railway operators must be able to access indispensable ticketing platforms, while independent ticket vendors must have access to railway operators' ticketing content under fair and non-discriminatory conditions.
- ▶ Align ticket availability deadlines with the Rail Capacity Management Regulation. The proposed five-month advance sales obligation must take account of capacity allocation and Temporary Capacity Restriction (TCR) timelines.
- ▶ Extend hosting obligations to physical distribution channels. Indispensable ticketing service providers should be required to provide access to their ticket vending machines.
- ▶ Establish clear and enforceable FRAND rules. The envisaged Implementing Regulation should provide detailed guidance. Stakeholders should be involved in its preparation from the outset.

Part 2 – Regulation on Multimodal Booking (RMB)

ALLRAIL supports measures to prevent dominant ticketing platforms from abusing their market position. However, the proposed neutral display obligations risk imposing disproportionate restrictions on independent ticket vendors without adequately addressing the underlying structural conflict of interest created by vertical integration.

Preserving innovation and personalised passenger services. Independent ticketing platforms should remain free to develop functionalities tailored to passengers' needs, rather than being required to apply uniform display criteria.

Allowing paid promotion on independent ticketing platforms while restricting it on vertically integrated platforms. Paid prominence should remain possible for independent vendors, subject to appropriate transparency safeguards. However, vertically integrated platforms should not be permitted to use paid promotion to circumvent non-self-preferencing obligations or favour their own railway services.



Part 1 – Rail Ticketing Regulation

Welcoming Hosting and Sharing

Hosting

ALLRAIL welcomes the introduction of a hosting obligation in Article 5 of the proposed Rail Ticketing Regulation. This represents a significant step towards a more competitive and transparent passenger rail market by ensuring that independent railway operators can have their services hosted by ticketing platforms that constitute indispensable gateways to passengers.

As argued in ALLRAIL's Digital Markets Act Position Paper, **dominant market position** of vertically integrated ticketing platforms **effectively makes them digital gatekeepers** to passenger rail services.

These platforms increasingly go beyond being simple direct sales channels: they display and sell the services of other railway operators and, in some cases, other mobility services.

At the same time, where they are controlled by a railway operator competing in the downstream passenger rail market, they retain both the ability and the commercial **incentive to restrict the visibility or sale of competing rail services**.

The European Commission itself expressly recognises this structural problem. Recital 6 of the proposed Regulation describes ticketing platforms controlled by railway operators with significant market presence as having inherited **"quasi-monopolistic positions"** and being the **"standard reference for rail passengers"**.

The Commission's Impact Assessment similarly finds that the vast majority of searches and ticket sales in several Member States remain concentrated on inherited incumbent-owned digital channels. This creates a **structural conflict of interest**: the same economic group simultaneously competes for passengers in the rail transport market and **controls one of the principal gateways** through which passengers discover and purchase competing services.

EU railway law already recognises that effective market competition may require regulatory safeguards on dominant railway operators. Article 13 of Directive 2012/34/EU imposes specific non-discrimination and independence requirements when service facilities are controlled a dominant stakeholder.

While a digital ticketing platform is not a service facility within the meaning of that Directive, the underlying competition concern is analogous to rail ticketing.

Essential facilities like digital gateways should be open to all rail operators.

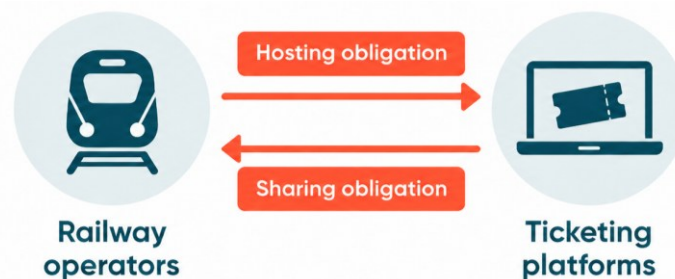
The hosting obligation applies this established principle of rail market opening to the increasingly important digital distribution layer. However, **hosting in and of itself is not enough**.



Platforms should not be able to hide competing railways operators behind their own services. By placing competitors behind additional search steps, applying discriminatory defaults or otherwise making competing offers materially less visible to passengers, an indispensable ticketing provider could formally comply with Article 5 by listing a competitor while giving its own services systematically greater prominence.

For that reason, the hosting obligation should be complemented by a clear and enforceable principle of **non-self-preferencing** applicable to indispensable vertically integrated railway ticketing providers. Such a principle would be consistent with the approach already established by Article 6(5) of the Digital Markets Act.

The hosting obligation, combined with an explicit prohibition of self-preferencing, **is a necessary and proportionate measure** to ensure that EU rail market opening results in effective competition not only on the tracks, but also at the point where passengers actually choose and purchase their journeys.



Sharing

ALLRAIL welcomes the proposed increase in transparency and market opening made possible by the sharing obligation. Passengers should have a real choice of which ticketing platform to use and innovative services should be given a level playing field on which to compete.

The sharing obligation is particularly important in relation to dominant, vertically integrated railway operators. In many Member States, these operators have inherited a dominant position in both passenger rail services and in ticket distribution. There is a clear precedent that access to fares, products, data or functionalities may be restricted in order to **protect the incumbent's own distribution channel from competition**.

The sharing obligation is therefore the necessary counterpart to the hosting obligation. Just as independent railway operators must be able to access dominant ticketing platforms, independent ticket vendors must be able to access the content of railway operators. **Without this two-way openness, effective competition in rail distribution cannot develop.**

Competition-law cases and investigations in Germany, Italy and Spain demonstrate that these concerns are not hypothetical. They also show the limits of relying solely on ex post enforcement under Article 102 TFEU.

A clear EU-level ex ante obligation is necessary to provide legal certainty and prevent dominant railway operators from using control over essential ticketing content to shield their own distribution channels from competition.



Non-self-preferencing

ALLRAIL considers that the indispensable ticketing platforms **should be explicitly obliged to not self-preference** their own vertically integrated railway services over third-party railway operators.

As established by the Digital Markets Act (DMA) and competition law cases, the dominant entity controlling a digital gateway should not preference its own services ahead of those of a competitor.

In the case of the railway sector, it is crucial that dominant digital platforms **do not preference their own vertically integrated passenger services** over the services of a competition railway operator.

It is therefore essential to ensure that dominant vertically integrated ticket vendors do not:



- ▶ rank or display the services of the dominant vertically integrated operator more favourably than equivalent services offered by competing railway operators;
- ▶ apply discriminatory commercial or technical conditions that reduce the visibility or accessibility of competitors' services;
- ▶ use technical standards, journey compilation algorithms, filtering criteria, pricing displays, booking flows or other interface design features to steer passengers towards their own services; or
- ▶ otherwise leverage their position as indispensable ticket vendors to distort competition in downstream passenger rail operator markets.

A robust non-self-preferencing obligation is indispensable to ensure that the hosting obligation delivers **genuine competition in both the letter and the spirit of the Regulation**.

This obligation would also be more appropriate than the broad and prescriptive neutral display filter criteria set out in RMB.

The timeline for the availability of rail tickets should be fully aligned with the Rail Capacity Management Regulation.

ALLRAIL welcomes the Commission's proposal to establish a harmonised timeline for the availability of rail tickets across the European Union. Providing passengers with earlier access to tickets **improves the attractiveness of rail and enhances legal certainty** for both passengers and railway operators.

The proposed deadline should be fully aligned with the timelines established under the Rail Capacity Management Regulation.



While the annual capacity allocation process generally provides railway operators with confirmed train paths, this is not the only stage at which capacity decisions affecting passenger services are taken.

Under Annex I of the Rail Capacity Management Regulation, and in particular the future delegated act on Temporary Capacity Restrictions (TCRs), infrastructure managers may alter previously allocated train paths during the running timetable. In many cases, the final alternative train path **may only be confirmed approximately four months before** the train runs.¹

Requiring railway operators to make tickets available five months before departure, while allowing infrastructure managers to modify train paths until approximately four months before the train run, **creates a misalignment between ticket sales obligations and operational certainty**. This risks forcing operators either to market services based on unconfirmed timetables or to amend bookings after tickets have already been sold.

ALLRAIL therefore considers that the ticket availability requirements under Article 8 should be fully aligned with the Rail Capacity Management Regulation, including the deadlines that will be established in the future delegated act on Temporary Capacity Restrictions. This **would ensure that passengers benefit from reliable timetable information** while providing railway operators with sufficient operational certainty before tickets are placed on sale.

A clearer scope of the services covered is needed

In ALLRAIL's view, the scope of Article 2 of the proposed Regulation should be clarified.

Stand-alone rail networks may operate, at least in part, on infrastructure that falls within the scope of the SERA Directive. This is the case for certain regional and commuter services in Member States such as Spain and France. **A clearer approach is therefore required**, as the distinction based solely on the nature of the infrastructure may create legal uncertainty.



An existing precedent from the Île-de-France Mobilités² case, demonstrates the importance of the sharing obligation and the importance of including these services where they form part of an integrated passenger journey.

¹ According to Annex I section 3 of the Regulation (EU) 2026/1184 of the European Parliament and of the Council of 20

² Autorité de régulation des transports, Décision n° 2026-014 du 18 février 2026 portant règlement du différend opposant SNCF Connect à Île-de-France Mobilités relatif au contrat Pack V0, public version, 18 February 2026. In this decision, the French Transport Regulatory Authority held that the conditions imposed by Île-de-France Mobilités on third-party ticket retailers must be reasonable, equitable, transparent and proportionate. It required IdFM to remove preferential treatment for its own sales channels, remunerate SNCF Connect for distributing its tickets, and protect commercially sensitive data submitted by third-party distributors.



Furthermore, the objective of providing passengers with seamless point-to-point ticketing solutions supports a broader scope.

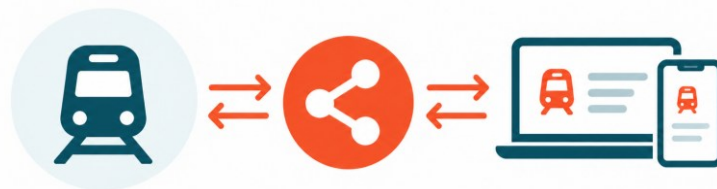
ALLRAIL therefore considers stand-alone rail networks serving densely populated urban and metropolitan areas should also fall within the scope of the Regulation.

This would simplify the application of the Regulation, provide greater legal certainty and better reflect passengers' expectations of integrated rail ticketing across the entire journey.

Furthermore, in the context of the revision of the Rail Passenger Rights Regulation, **coherency on the scope of the services covered and the rights provided is needed.**

A mismatch in the scope of the Regulations may lead to a situation where a passenger would book a 'Single Ticket', but due to exemptions, not have their rights covered throughout the journey.

Data sharing between rail service providers and ticketing platforms



As per the proposed Regulation, ticket vendors must inform the railway operators of what tickets it has sold.

In the context of the revision of the Rail Passenger Rights Regulation and the proposed 'Single Ticket', ticket vendors should also **share the relevant information relating to the journey and potential future obligations for rail operators** involved in a 'Single Ticket'.

However, it is also important that **sensitive commercial information is not indiscriminately distributed**, particularly on highly competitive open access routes.

Physical distribution channels should also fall within the scope of the Regulation

In ALLRAIL's view, the Rail Ticketing Regulation should explicitly include hosting on physical distribution channels. Despite the continued growth of digital sales, ticket offices and **ticket vending machines remain an important part of the distribution strategy** of railway operators.

In many Member States, incumbent state-owned railway operators continue to sell all their services – both public service and commercial Open Access – through integrated networks of ticket offices and ticket vending machines located in passenger stations.



New entrant railway operators, by contrast, often **face significant barriers** to accessing comparable physical distribution channels, particularly where the station manager and the incumbent operator belong to the same vertically integrated group or operate under a common commercial brand.



Although Annex II, point 4, of the SERA Directive³ identifies ticketing services in passenger stations as a rail-related service, the current legal framework does not provide sufficient clarity where physical ticket offices or ticket vending machines are operated by an entity other than the station manager, such as a subsidiary or an affiliated company of the incumbent railway operator. This **legal uncertainty undermines effective access** to an essential sales channel.

We consider necessary to introduce a targeted obligation requiring indispensable railway ticketing service providers to grant, upon request and under FRAND conditions, **equal access** to any physical ticket distribution channels at railway station, operated either by them or by any subsidiary or affiliated entity.

Accordingly, the hosting obligation set out in Article 5 should expressly extend to physical retail channels, including ticket offices and ticket vending machines, where these are controlled by, or form part of, the same corporate group as an indispensable railway ticketing service provider.

FRAND Commercial Agreements

Need for greater clarity on the implementation of FRAND terms and conditions

ALLRAIL encourages the Commission to begin work on the envisaged Implementing Regulation without delay. The effectiveness of the proposed Regulation will depend on clear, detailed and enforceable rules governing the **practical application of FRAND obligations**.

Railway operators and ticket vendors need a **clear framework** for negotiating access conditions, contractual terms, data sharing and distribution arrangements with dominant railway operators or ticket vendors.

Without such clarity, divergent interpretations, prolonged negotiations and disputes risk delaying market entry, competition and innovation.

Railway operators, ticket vendors and other relevant market participants should be involved in the preparation of the Implementing Regulation from the outset, so that the rules **reflect the commercial and technical barriers encountered in practice**.

³ Directive 2012/34/EU of the European Parliament and of the Council of 21 November 2012 establishing a single European railway area (recast), OJ L 343, 14.12.2012, p. 32, as amended by Directive (EU) 2016/2370 of 14 December 2016, OJ L 352, 23.12.2016



Article 6 should therefore provide a clearer mandate for the Commission, identifying the main areas to be addressed and requiring sufficiently detailed safeguards, procedures and criteria to ensure legal certainty and effective enforcement.

It should address:



- **Assessment of commercial agreements:** Objective criteria should be established for assessing whether contractual and commercial terms are fair, reasonable and non-discriminatory. Guidance for both National Regulatory Bodies and companies will be essential during the first series of new hosting and sharing agreements.



- **Commission fees:** In particular, guidance on the level of commission fees and how they are determined is essential. The balance between fair and reasonable, for the added value provided, and the requirements for non-discrimination between equivalent services should be given greater clarity, particularly where the market power of actors diverges greatly.



- **API service levels:** APIs provided to third-party ticket vendors should meet minimum service levels comparable to those of the operator's own sales channels.



- **API data and functionality:** Third-party retailers should have access to the data and functionalities necessary to provide a service equivalent to the operator's own channels.



- **API documentation:** Complete and up-to-date API documentation should be readily accessible, preferably in English, or through an online format that allows effective translation. Material changes should be communicated sufficiently in advance.



- **Payment methods:** Ticket vendors should be able to offer commonly used online payment methods without discriminatory technical or contractual restrictions.



- **Monitoring and remedies:** The Implementing Regulation should establish minimum contractual monitoring and remedy provisions for breaches of FRAND obligations or agreed service levels.



- These FRAND safeguards should ensure that stakeholders have a **clear set of obligations, expectations, and protections**, when negotiating commercial agreements for ticket distribution.



These safeguards should ensure that **the letter and the spirit** of the Regulation is preserved and prevent dominant actors for using technical tools to protect their interests or disadvantage their competitors.

Not all railway service providers are the same

In ALLRAIL's view, the Regulation should clearly distinguish between dominant railway service providers and smaller market participants.

The obligations relating to the sharing of ticketing content should reflect the different market realities. While dominant operators possess the resources and market position to comply with ambitious implementation deadlines, smaller operators often have more limited technical and financial capacities.

The timelines for complying with content-sharing obligations **should** therefore **be proportionate and take account of the operational realities** faced by SMEs, SMCs and new entrant railway operators.



Part 2 – Regulation on Multimodal Booking

Appropriateness for the rail sector and lacking multimodal elements

While ALLRAIL welcomes the ambition of the Regulation on Multimodal Booking to **regulate dominant digital platforms** from abusing their market position.

However, **excessive regulation** of all ticketing platforms and **restricting innovation** for third-party ticketing platforms will not produce a beneficial outcome, nor for the platforms, the rail operators, or the passengers.

ALLRAIL remains **ready to contribute constructively** towards to the ambition set out and advise on the best way of achieving it.

Independent ticketing platforms have little to no stake in which operators are sold, so long as tickets are sold. Whereas, vertically integrated ticketing platforms, due to their ownership structure, **are incentivised to sell their own operator** tickets over those of independent rail operators. There is an inherent conflict of interest.

A **balance must be struck**, allowing independent ticketing platforms to innovate and compete with the dominant platforms. Dominant platforms, in turn, should not be allowed to skew the results on their platforms in their favour.

Article 7 – Neutral Display

The neutral display obligations established in Article 7 attempts to address the structural conflict of interest in vertically integrated ticketing platforms, however, ALLRAIL is concerned that it will **not achieve the intended purpose**.

Neutral Display Filters

The obligation to use neutral display filters as laid out in Article 7 (5) is a rather prescriptive. This would force ticketing platforms to filter and display results in the exact same fashion regardless of the passenger, preventing them from tailoring the results to the passenger's need.

More accurately, **a non-self-preferencing obligation is needed**, the criteria laid out in the Article do not adequately achieve this aim.

Moreover, the downranking of railway services when ghg and CO2 emissions are not reported is burdensome on small operators who have limited personnel to dedicate to reporting.

An effective alternative: non-self-preferencing

ALLRAIL calls for **a robust non-self-preferencing obligation** in the Rail Ticketing Regulation. This principled obligation is in line with **the precedent set by the DMA** and would more effectively protect the interests of smaller parties.

Furthermore, it would allow independent ticketing platforms to more effectively **innovate** and tailor their services to passenger needs.



The commercial interest of independent ticketing platforms is quite simply to sell as many tickets as possible, whereas a vertically integrated ticketing platform is structurally incentivised to sell its own services ahead of those of a competing operator. This **structural conflict of interest** is best addressed by a non-self-preferencing obligation rather than a prescriptive neutral display obligation.

Paid promotion

ALLRAIL considers the limits to **paid prominence, as currently proposed by the European Commission, to be excessively restrictive** for independent ticketing platforms. Paid prominence remains a valid business model for independent ticketing platforms to generate revenue. The current regulation and transparency requirements for this type of content remain suitable for the protection of passengers, whilst allowing innovation and competition in the digital distribution market.

However, **to ensure that all offers remain visible across all mobility platforms**, measures should be taken to ensure that the size of the promoted content should not prevent customers from seeing normal (non-paid for) content on the first page of search results.

Nevertheless, restrictions on paid prominence as contained in the original proposal should remain in place for vertically integrated ticketing platforms. Account separation between the rail operator and its ticketing platform is already a considerable issue; this should not be exacerbated by allowing such platforms to easily promote own-content. This would allow a circumvention of the non-self-preferencing obligation and disadvantage passengers from seeing the services that truly suit their needs

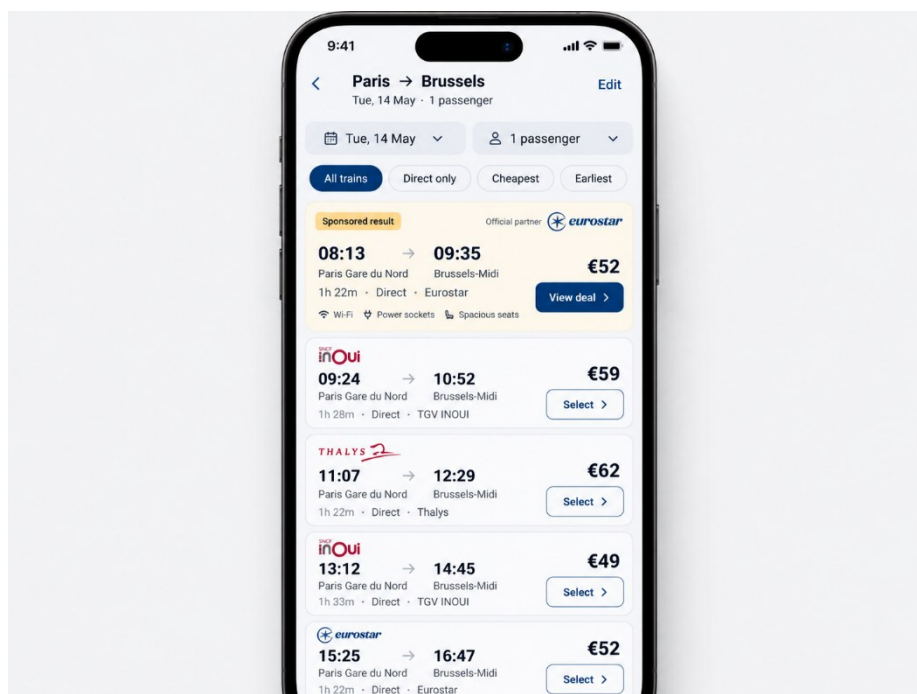


Figure 1 – Example of how paid promotion should be displayed in a search result

