



REPORT

Advancing EU rail passenger rights

The status of European passenger rights, opportunities in the EU Passenger Package and what is needed to protect rail passenger rights across the EU.

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Foreword

Robin Loos, Head of Transport and Mobility at BEUC

The train and its passengers have a long-standing love-hate relationship. Who has never dreamed of a beautiful, long train journey for their holidays? And at the same time, who has never cursed a delay or a missed connection during an already stressful workday?

This naturally raises a third question: can we solve all the problems of rail travel and keep only the dream? Probably not. But if there is one area where policymakers can act right now, it is passenger rights.

For more than 20 years, air passenger rights have provided consumers with broad protection, sparing them a considerable mental burden.

The same cannot (almost) be said for rail travel. Rail passengers' rights are extremely limited, vary across different regions of Europe, or depend on the goodwill of railway companies. Worse still, [19 Member States](#) apply exemptions to rail passenger rights, covering a large majority of rail services across the EU.

The European Commission's recent proposal (aptly named the '*Passenger Package*') aims to put cross-border passengers back in a comfortable seat: one where they can be confident of receiving assistance, rerouting, or accommodation in the event of a problem, regardless of whether they are travelling with different operators.

The intention is commendable, and the proposal is ambitious. Yet more is needed. Under the proposal, passengers' rights will be guaranteed if they purchase their tickets on the same platform and in a single transaction. In practice, however, many barriers remain. Making access to rights conditional on a single purchase does not reflect the reality faced by many passengers. Likewise, the protection of these rights should extend to the entire journey.

The consequences of the current situation, though not always visible, are very real for consumers: abandoning rail travel in favour of air travel or driving, unresolved complaints, and exorbitant costs for purchasing a new ticket or finding accommodation. Based on BEUC's estimates, these costs range from [€100 to €200 on average](#), while complaints often go unanswered (when consumers even bother to file them).

We may be on the verge of a major European success story, much like the abolition of roaming charges or the implementation of air passenger rights. One day, European consumers may be able to travel across Europe by train with complete peace of mind. At a time when massive investments in rail infrastructure and rolling stock are being announced, let us hope that railway operators welcome the Passenger Package enthusiastically. Then the love-hate relationship between Europeans and rail travel may finally become a true passion affair.

Executive summary

When passengers combine several operators in one journey, they are often not guaranteed full passenger rights. Yet, more and more companies are operating rail services in the EU. The regulations proposed in the EU Passenger Package in May 2026 represent a major opportunity to fix this situation, but there is more work to do to guarantee full passenger rights are secured across the EU.

Our report demonstrates that, currently, European rail passengers are not sufficiently protected and are still exposed to financial burdens when they miss a rail connection between operators. We show that, despite European regulation and industry schemes, passengers missing a connection still have to buy expensive last-minute tickets or pay for their accommodation themselves. Harmonised EU regulation is needed to guarantee rail passenger protection across a broad range of journeys involving several operators.

The EU Passenger Package represents a major step forward in passenger rights protection.

These proposals aim to guarantee protection for passengers who hold a '*single ticket*', including assistance for food and accommodation costs, reimbursement, rerouting and compensation. This would apply to both international and domestic journeys, including those involving multiple operators. This is a major win for passengers.

However, the package has shortcomings for passengers. The proposed regulations define a *single ticket* as a **journey booked in a single transaction. Passenger rights are therefore directly tied to the booking possibilities on ticketing platforms.** The '*hosting obligations*' from the EU Passenger Package will mandate dominant ticketing platforms to display or resell tickets from any operator running services in the country where they are dominant. [Previously](#), we showed that booking possibilities from market-dominant platforms were currently insufficient. Our new analysis reveals that due to a limited geographical scope, **the hosting obligations will barely improve this situation:** 43% of the rail equivalents of Europe's most flown routes will remain difficult or impossible to book as a single ticket on these platforms, **limiting the coverage of improved passenger rights.**

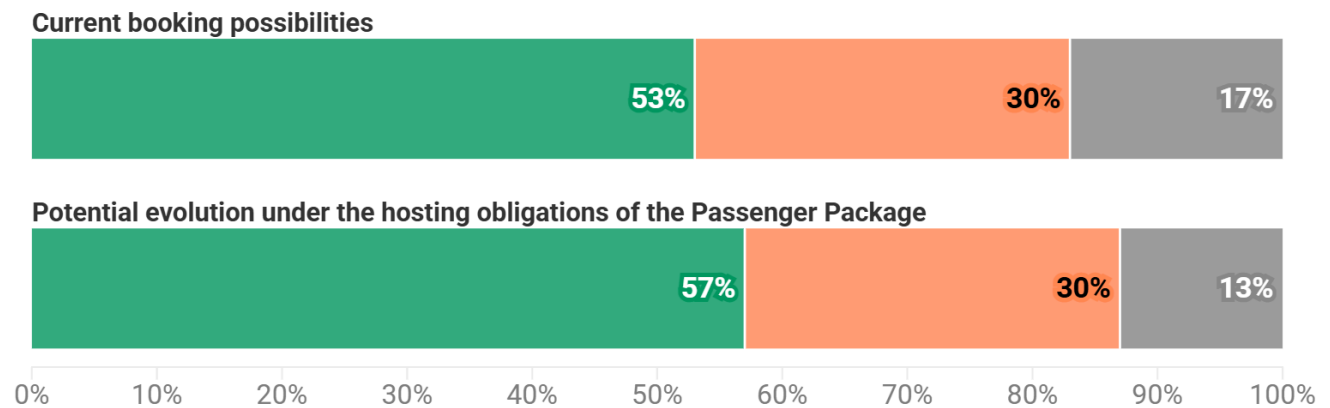
For these new regulations to fully deliver, we call for expanding the geographical scope of the hosting obligation from the EU Passenger Package. Expanding this scope would in turn expand passenger rights coverage and encourage modal shift. We also call on EU institutions to extend the definition of a single ticket to journeys booked via a single platform, rather than strictly limiting the definition to a single transaction. **Otherwise, there is a risk that these new regulations will create unharmonised, unequal rights for passengers,** depending on where and when they book their tickets.

The Passenger Package would not guarantee passenger rights on nearly half of the rail journeys reviewed

New requirements on major ticketing platforms will barely change booking possibilities. This will limit access to single tickets, the prerequisite for passengers' full protection

The journey can be booked in one transaction on:

- Booking engines from the rail operator of the departing and arriving countries
- Only one booking engine
- None of the booking engines



Source: T&E, OAG • Rail booking possibilities for the 30 most flown EU cross-border air routes where rail equivalent journeys are under 1500 km. Booking projections assume dominant platforms will receive booking requests from other operators and not just display their services



Key findings

- 01 **40%** of rail alternatives to the 30 busiest cross-border aviation routes currently have no guaranteed passenger rights (under European regulation or industry schemes).
- 02 If the hosting obligations were implemented in their current form, **43%** of the rail alternatives for the top 30 most flown routes in the EU would still be impossible or difficult to book on major operator websites as a single ticket, therefore **limiting access to full passenger rights**.
- 03 **88%** of rail travellers who responded to an online questionnaire were not aware of the Agreement on Journey Continuation (conducted with Que Choisir Ensemble).
- 04 **55%** is the average cost increase passengers face when missing a connection on the international routes we investigated

Recommendations

01

Expand the geographical scope of hosting obligations on major rail operators to increase the availability of *single tickets*. This will extend passenger rights and encourage modal shift on the EU's most heavily flown and driven routes.

We recommend that EU institutions mandate major operators to sell tickets for journeys where high passenger demand is clearly demonstrated. This demand can be evidenced by aviation data, road traffic volumes, search queries, transport studies, or other market indicators.

02

Improve public awareness of passenger rights through mandatory communication from ticketing platforms regarding passenger rights to compensation, assistance, rerouting and reimbursement, as well as through public awareness campaigns and uniform application at ticket offices and on board.

03

Mandate all transport operators to share greenhouse gas emissions data under the Multimodal Booking Regulation. This data must be shared with ticketing platforms so they can display the carbon footprint of each journey directly to passengers. This will enable informed, sustainable travel choices.

What other factors are important to consider for the upcoming EU ticketing regulations?

Discounted or flat-rate passes such as Climate Tickets use different booking mechanisms due to their subscription model. It is essential that these are **included in this legislation to ensure passenger rights** associated with Single Tickets are enjoyed by passengers benefiting from other rail initiatives.

We welcome new proposals on booking horizons (i.e. how far in advance tickets can be bought). However, we recommend a minimum of 6 months to help passengers book a single ticket in one transaction with full rights.

If you would like to read more about our other demands regarding the EU Passenger Package, please read our report [Modernising the EU's rail ticketing regulation](#) from April 2026.

1. Introduction

The loopholes within current passenger rights coverage

Current European regulation and initiatives from the rail industry are not delivering enough protection for rail passengers in Europe.

1.1 How are rail passenger rights currently covered in the EU?

Passenger rights protection **is insufficient for journeys involving different operators.**

- **Rail Passenger Rights Regulation (EU) 2021/782.** Article 12 sets the obligation to provide **through-tickets** to passengers that purchased rail tickets in a single commercial transaction from the same railway undertaking. Such through-tickets should also be delivered where long-distance and regional rail passenger services are operated by a single railway undertaking. Other articles further define obligations of compensation and assistance to passengers in case of a missed connection guarantee by through-tickets.

This regulation is limited, as passengers often have to combine services from different rail operators, as we demonstrate in [section 3.1.1](#). These journeys do not fall in the current definition of through-tickets and **are therefore not covered by European regulation.**

- **Agreement on Journey Continuation (AJC).** [This multilateral agreement](#) aims to cover the gaps left by the EU regulation. It proposes that rail passengers who have missed a connection between two different rail operators jump on the next available train, free of charge if the operator is signed up to the AJC.

However this scheme has severe limitations. First, **the majority of rail operators** (especially new entrants) **are not yet part of the AJC.** Second, the AJC is a **non-binding** scheme, based on commercial gestures from rail operators. This means that it is not **automated**, and that passengers need to be aware of the existence of this programme beforehand. Finally, the AJC **only covers international travel**, and **does not offer food or accommodation assistance** to passengers that need to catch a train the next morning.

- **Hop On The Next Available Train (HOTNAT).** [This agreement](#) has the same limitations. It **only covers seven rail operators, applies only to high-speed rail services, and is restricted to specific major hubs.**

- **National initiatives** such as [Resplus tickets](#) in Sweden provide rail passengers with **protection in case of a missed connection between different rail operators**. Recently the [French Senate](#) has also proposed a law that aims to legally protect passenger rights across France between domestic operators, including rerouting, compensation, reimbursement and assistance for food and accommodation costs. Such national regulations are extremely positive and pave the way for better passenger protections. However, isolated initiatives are insufficient to build a strong, uniform and connected European rail network where passengers could be guaranteed the same rights.

1.2 Aim of the study

In our previous report '[Modernising the EU's rail ticketing regulation](#)' we focused on the Rail Ticketing and Multi-modal Booking regulations proposed by the Commission by drawing an overview of rail ticket booking possibilities across the EU. In this new report, we focus on the third regulation from the EU Passenger Package: the Revision of the Rail Passenger Rights Regulation.

- **First, we study the potential impact of the EU Passenger Package:**
Passenger rights depend directly on single tickets under these new regulations. We first demonstrate that this proposal fails to fix the lack of *single-ticket* access on dominant platforms (see [section 2.2](#)). This analysis is based on the current scope of the hosting obligation, and assumes the sharing obligation will not be adopted by dominant platforms. Please refer to [section 2.1](#) for a definition of sharing and hosting obligations.
- **Second, we investigate the current limitations of passenger rights in the EU:**
We map the current state of rail passenger rights in Europe, especially exploring passenger protection in case of a missed connection. We study rail equivalents to the most flown routes in the EU to assess passenger coverage in case of a missed connection. We analysed the same 83 routes as in our [previous report](#) (all under 1500 km): 50 international routes, including the top 30 most flown cross-border routes, and 33 domestic routes (see [section 3.1](#)). Comparison with aviation allows us to challenge rail travel options with another popular travel mode for long distance in Europe.

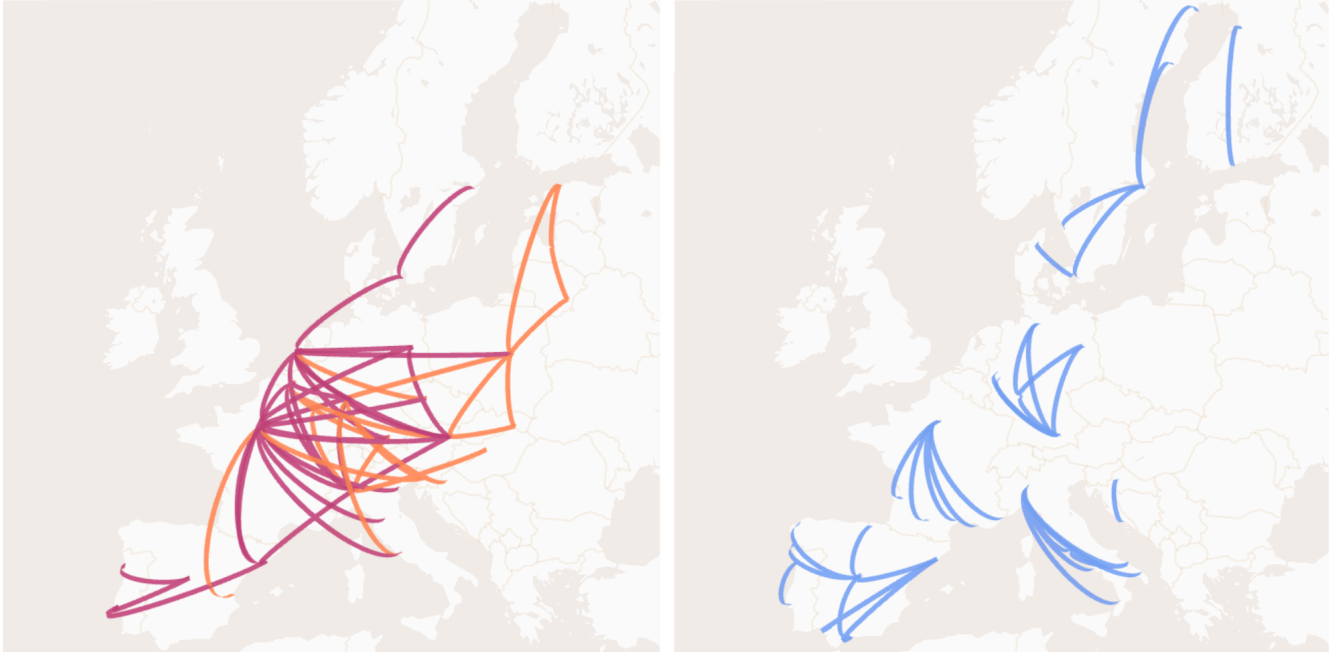
Next, we assess testimonials from an online questionnaire conducted with the French consumer organisation Que Choisir Ensemble. With this questionnaire we explore passengers' experiences with rail cross-border travel today (see [section 3.2](#)).

Finally, we show that passenger rights extension must also include domestic travellers in Europe (see [section 3.3](#)).

Geographical scope of the study

Routes studied cover 21 Member States

- Rail equivalent to the 30 most flown routes in the EU
- International rail routes added to the study to extend analysis scope
- Domestic rail routes among the most flown in the EU



Source: T&E • Based on rail equivalent to routes among the most flown in the EU.



2. Analysis - Evaluation of the EU Passenger Package

The EU Passenger Package has huge potential to improve passenger rights, but requires more ambition

On the 13th of May 2026, the [EU Commission proposed three regulations](#) to modernise rail ticketing and passenger rights: The Rail Ticketing Regulation, the Multi-modal Booking Regulation and the Rail Passenger Rights Regulation. These ambitious reforms aim to modernise rail ticketing. Yet, there is more work to do to ensure President Von Der Leyen's political guidelines are fully met.

Key data points - EU Passenger Package

Analysis of the EU Passenger Package on booking possibilities for rail alternatives to the 30 most flown EU cross-border routes:

2

Additional routes bookable as a single ticket on dominant platforms under the hosting obligation

43%

of the routes studied cannot be booked as a single ticket on dominant platforms. Passengers booking through these platforms are left unprotected in the event of a missed connection

97%

The share of routes where a single ticket is available on at least one platform. Most of this coverage comes from independent platforms, not dominant ones

2.1 What the EU Passenger Package covers

2.1.1 Improvements brought by the Passenger Package

We welcome the Single Ticket, which is defined as *"valid evidence, regardless of its form, of a through-ticket or of the conclusion of two or more transport contracts for a single journey purchased in a single commercial transaction from a railway undertaking, ticket vendor or tour operator"*. As our previous polling indicated, the hassle of booking a ticket deterred [61% of respondents](#) from travelling long-distance by rail. This measure has the potential to solve those difficulties, by promoting a more modern, convenient approach to ticketing and strengthening passenger rights. The EU Passenger Package allows **single tickets to be booked from all booking platforms**. Journeys that can be sold as a single ticket can no longer be split into separate transactions.

When offering tickets, railway undertakings, ticket vendors and tour operators shall not segment or sell under separate commercial transactions any journey which can be sold under a single ticket (Proposal for an amending regulation on passenger rights 2026/0114, Article 1).

The **new hosting obligation** on major operators to sell competitors' tickets where requested is a positive proposal. In the absence of a request from their competitors, dominant operators will have at least the obligation to display their services. This will give passengers the opportunity to view all available journeys and tickets, including the cheapest options.

The **'sharing obligation'** presents a huge opportunity for any operator or independent platform to request to sell any tickets across the EU. This can substantially improve access to single tickets and subsequent passenger rights. Any ticketing platform could hypothetically sell tickets across the EU, including tickets departing from or entering the EU, as a single ticket. This is a golden chance for rail actors to boost the rail market and modal shift. Now, the onus is on industry to grasp that opportunity.

Hosting obligation

An indispensable railway online ticketing service provider shall conclude a commercial agreement with a requesting railway service provider for the purpose of displaying, re-linking, reselling or distributing the rail products of that provider for rail passenger services that are operated, or have their origin or destination, in the Member State in which the railway undertaking that is vertically integrated with the online ticketing service provider has significant railway market presence [...]

Independently of any request [...], an indispensable railway online ticketing service shall display and include in relevant search results, all available railway services that are operated or have their origin or destination, in the Member State in which the railway undertaking that is vertically integrated with the online ticketing service provider has significant railway market presence (Proposal for a Regulation on rail ticketing 2026/0115, Article 5).

Sharing obligation

A railway service provider shall conclude a commercial agreement with a requesting online ticketing service provider for the purpose of providing content for the display, re-linking, resale or distribution of its rail products. The agreement shall not cover tickets that allow their holders to travel on multiple transport modes, provided that tickets for the relevant railway service are made available and can be purchased as a stand-alone rail product (Proposal for a Regulation on rail ticketing 2026/0115, Article 4).

We see the EU Passenger Package as a huge leap forward for passenger rights. **Passengers with single tickets are eligible for full protection**, including assistance for hotel or food costs, reimbursement, rerouting and compensation in case of a missed connection. These regulations also cover regional, domestic services. This is a win for passengers across the EU, given that domestic train travel covers 90% of all journeys across the EU.

Under the proposal, holders of single tickets for multi-operator journeys will receive protection (assistance, reimbursement, re-routing, compensation) if a delay or cancellation of an earlier service causes a missed connection (Proposal for an amending regulation on passenger rights 2026/0114, context of the proposal).

We welcome the Multi-Modal Booking Regulation proposals. It is however crucial for all transport operators, in and outside the rail industry to be mandated to share their greenhouse gas emissions with platforms. Passengers would then be able to make an informed decision about the carbon footprint of their journey. We also call on EU institutions and national bodies to ensure that subscriptions and public transport passes such as the Deutschland ticket are included in this proposal. This will ensure that holders of such offers can also benefit from full passenger rights.

2.1.2 Limitations of the Passenger Package

The Passenger Package suffers from several flaws. The main one is the limited geographical scope of the hosting obligation.

The hosting obligation will mandate dominant ticketing platforms (i.e. vertically integrated platforms of incumbent operators), on request from other operators, to resell or display tickets from any other operator running services in the country where the platform is dominant. This will also apply to cross-border services arriving in, or departing from the country where they have market dominance. But no further. If the hosting obligation were implemented as currently proposed, **43% of rail journeys studied would still be difficult or impossible to book** on major operators' ticketing platforms (see [section 2.2](#)).

The sharing obligation can further improve booking possibilities on dominant platforms. Based on [CER's response](#) to selling other operators' tickets, we can assume that dominant platforms are unlikely to seize this opportunity. **This is a concerning issue.** As outlined in [our previous report](#), the majority of passengers rely on these platforms for their booking. **If they are unable to access single tickets on the most used ticketing platforms, passengers will not benefit from full protection.**

President von der Leyen stated in her [political guidelines](#) that "To achieve our climate objectives, we also need to make it easier for people to shift to more sustainable options". The Commission's hosting obligation falls short of this commitment. Expanding the geographical scope of the

hosting obligation would extend passenger rights on incumbent operators' platforms and encourage passengers to switch to rail.

Finally, we believe that single tickets and the associated **passenger rights should not be limited to those buying tickets in a single transaction. Defining a single ticket as any journey booked on the same platform** would give passengers more flexibility, allowing them to add a connecting leg later without losing their rights, for instance.

2.2 Impact analysis of the EU Passenger Package

2.2.1 Effect on possibilities to book rail tickets from dominant platforms

Of the 30 busiest cross-border aviation routes with rail equivalents under 1500 km, **only two** will be changed by the hosting obligation: Barcelona-Paris and Madrid-Porto.

On the Barcelona-Paris route, it is currently possible to book a TGV ticket on SNCF Connect. It is impossible to book the same journey on Renfe. Under the hosting obligation, soon Renfe will have to at least display these TGV services on its booking engine, and potentially resell it if SNCF requests it. This is **because a direct service connects the two cities**. On the Madrid-Porto route, the journey is currently bookable in two separate transactions on Renfe's website. Thanks to the EU Passenger Package, Renfe will have to sell this journey as a single ticket. Comboios de Portugal (CP) will not be mandated to do so, as the Madrid-Vigo leg of the journey is located in Spain, where they have no significant market presence.

The hosting obligation will not improve booking possibilities on routes such as Paris-Rome. To travel by rail between these two cities, passengers can currently book this journey as a through-ticket on Trenitalia's website, with a change in Milan. It is impossible to book this same journey on SNCF Connect. The Milan-Rome leg of this route is in Italy, where SNCF Connect is not market dominant. The hosting obligation only applies where a platform is market dominant: SNCF Connect has no obligation to sell the Milan-Rome leg. However, the EU Passenger Package will increase the visibility of TGVs on Trenitalia, and increase the visibility of Frecciarossa trains on SNCF, offering more booking options to travellers between Paris and Milan.

Our research demonstrates that for other routes, **booking possibilities on major rail operators' websites in Europe will not be improved by the hosting obligation from the EU Passenger Package.**

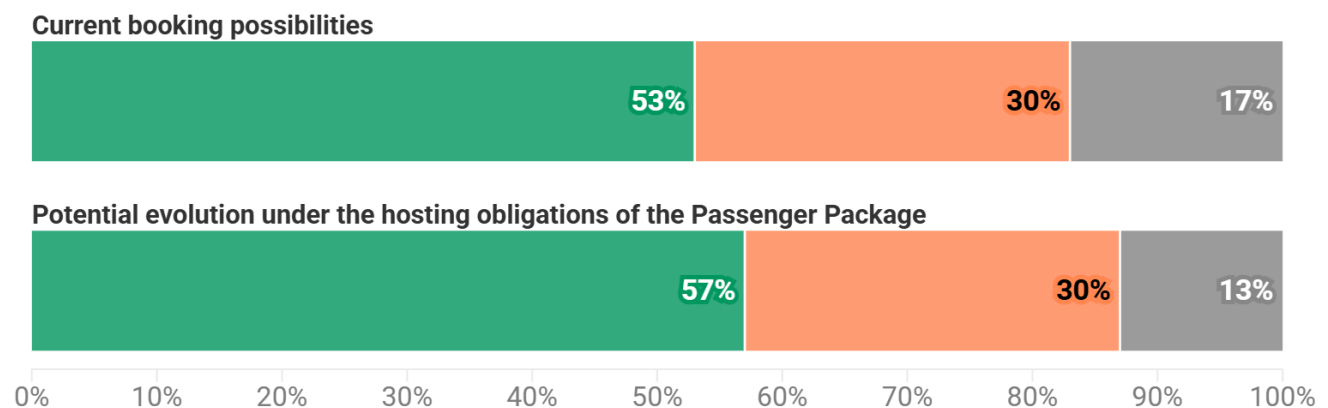
Our analysis focuses on the impact of **hosting obligations** on booking possibilities from dominant operator ticketing platforms. Assessing the effect of the **sharing obligation** is beyond the scope of this analysis.

The Passenger Package would not guarantee passenger rights on nearly half of the rail journeys reviewed

New requirements on major ticketing platforms will barely change booking possibilities. This will limit access to single tickets, the prerequisite for passengers' full protection

The journey can be booked in one transaction on:

- Booking engines from the rail operator of the departing and arriving countries
- Only one booking engine
- None of the booking engines



Source: T&E, OAG • Rail booking possibilities for the 30 most flown EU cross-border air routes where rail equivalent journeys are under 1500 km. Booking projections assume dominant platforms will receive booking requests from other operators and not just display their services



2.2.2 Impact on passenger rights protection

The upcoming regulations will make single tickets available across all types of ticketing platforms. On **97% of the cross-border rail journeys** studied, passengers will be able to find a single ticket **on at least one of the ticketing platforms assessed**. This means that on these routes, passengers have **at least one** booking option to be **fully covered for passenger rights**.

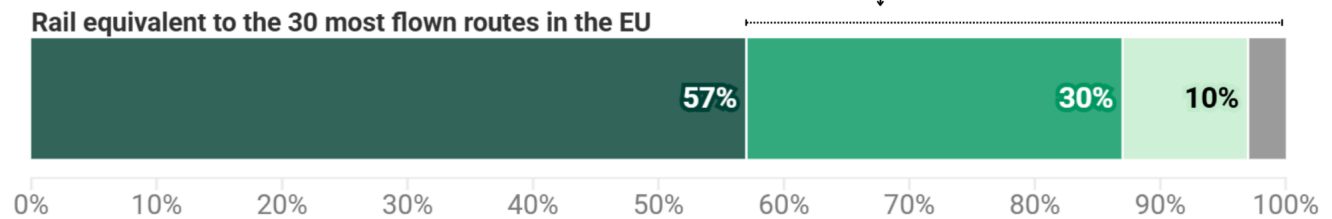
However, passenger rights being directly linked with booking possibilities of single tickets may create disparity among travellers. In our previous study, we showed that independent platforms are more likely to offer long distance rail journeys. Under the sharing obligation introduced in the EU Passenger Package, independent ticketing platforms will have easier access to rail operators' catalogue, and will be able to offer single tickets with full passenger rights. Despite vertically integrated platforms (SNCF Connect, DB's website...) being the **dominant actors** in this market, they may be **reluctant to integrate other operators' services** without a clear mandate to do so. Passengers opting for these platforms might find fewer booking options than those choosing independent platforms. As shown below, passenger rights coverage will directly depend on the ticketing platform passengers choose.


European rail passengers risk facing unequal rights under the EU Passenger Package

While full rights require a single ticket, not all platforms are mandated to offer them, meaning passenger protection will vary depending on the platform used

Single tickets will potentially be available on:

- Both incumbent operators and independent platform(s)
- Only one incumbent operator and independent platform(s)
- Only independent platform(s)
- No single ticket



Source: T&E • Research performed August 2025 - May 2026, on incumbent operators' booking engines from departing and arriving countries of routes studied and 4 independent platforms 

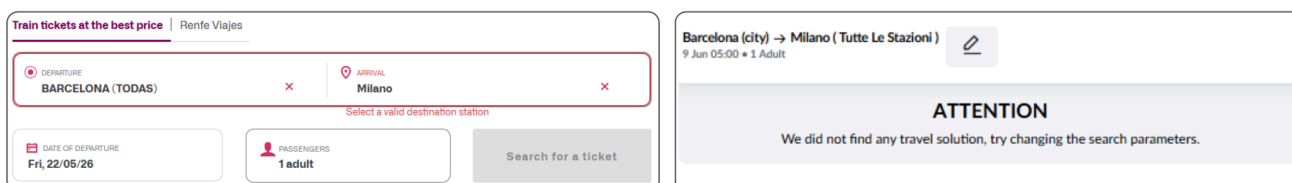
As explained, Barcelona to Milan journey cannot be booked in a single transaction from Renfe or Trenitalia. It is possible to book the first leg on Renfe, and the second leg on Trenitalia, separately. As this would not be a single transaction, this cannot be considered a single ticket under the new regulations. **Passengers choosing this option would not be covered in case of disruption.**

Alternatively, it is possible to book this journey on Trainline in a single transaction. Under the EU Passenger Package, this will be considered a single ticket, and will therefore be covered with full passenger rights. When booking on Trainline, only SNCF trains are displayed, and the journey is **1.4 times more expensive than booking separately** on Trenitalia then Renfe. This journey also appears on Omio, and the price is the same as buying in two parts on Renfe and Trenitalia (excluding booking fees). This example highlights an essential point: finding the cheapest and best-protected deal requires **navigating four different websites**. Under these conditions, even with the EU Passenger Package proposal as it stands, hassle for rail travel remains unnecessarily complex.

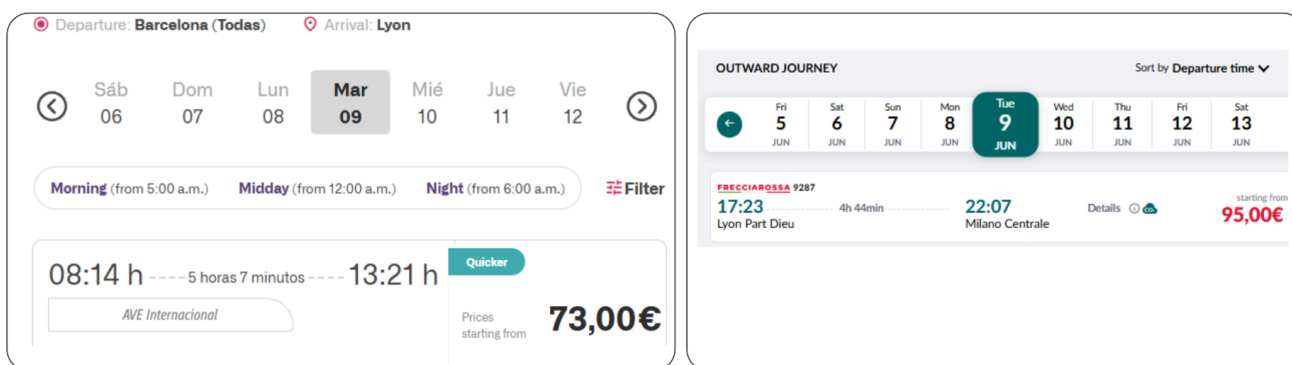
Limiting full passenger rights to single tickets will create disparity among European passengers

Example for Barcelona-Milan

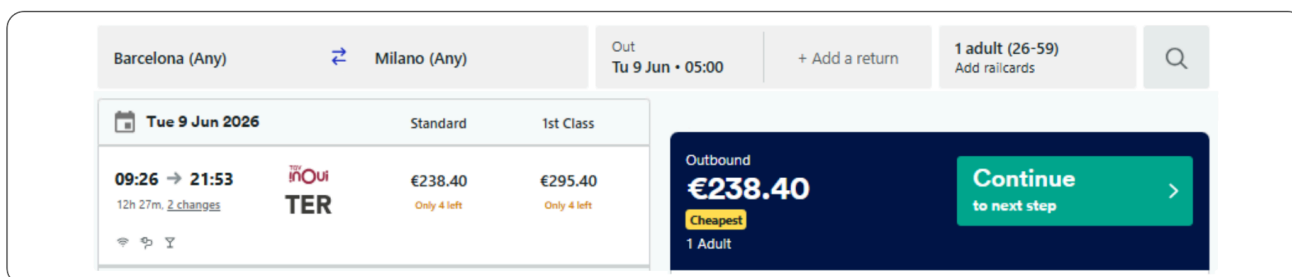
From Trenitalia's and Renfe's websites, the journey cannot be booked in one transaction. Hosting obligations from the Passenger Package will not change this situation.



Passengers can book this journey in two separate transactions on Renfe's and Trenitalia's websites. However, this will not be considered a **single ticket: no passenger rights guaranteed**.



On Trainline, the journey can be booked in one transaction. Passengers choosing this option will have access to a single ticket, **and their rights will be fully covered**.



Source: T&E • Research performed on Renfe, Trenitalia and Trainline websites in May 2026



3. Analysis - Current passenger rights coverage

Currently there is not enough protection for European rail passengers

The current European regulation in place covers passengers travelling with through-tickets with one operator, leaving passengers combining different operators unprotected. Schemes such as the AJC aim to fill this gap, but offer insufficient protection and do not cover domestic travel or key aspects of passenger rights such as assistance.

Key data points - current state of passenger rights

40%

Share of routes where rail passenger rights are not guaranteed (based on the 30 EU most flown cross-border routes)

1.6 times

Total cost increase in case of a missed connection and buying a new rail ticket

88%

Share of respondents to an online questionnaire who were unaware of the AJC

3.1 Rail passenger rights for international travel: where do we stand?

3.1.1 Combining services operated by different rail carriers

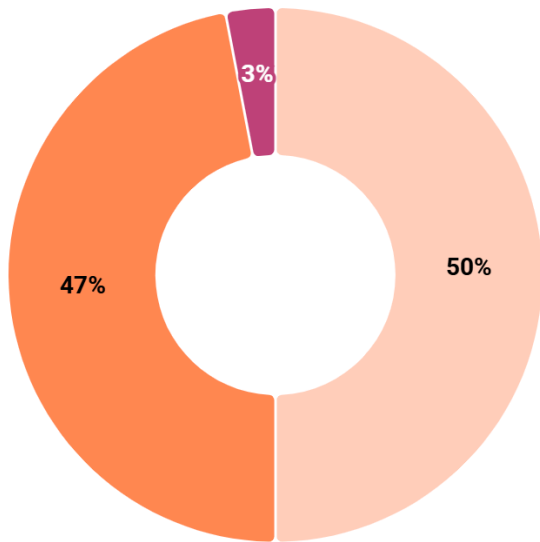
Our analysis shows that on **half of the rail equivalent journeys of the 30 most flown routes in the EU, passengers have to combine several services operated by different carriers**. Extending the scope of the study to 50 routes increases this share to 60%. EU regulation 2021/782 sets no assistance obligations for missed connections between services from different operators, **leaving more than half of the journeys we studied unprotected**.

On more than half of international journeys studied, passengers need to combine different operators

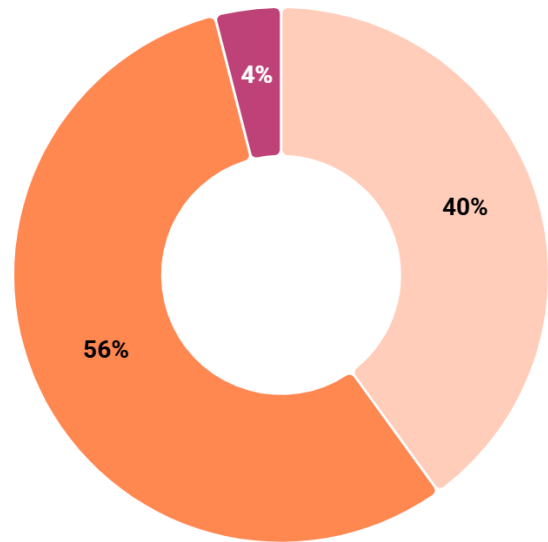
Current EU regulations do not offer protection to passengers who miss a connection between multiple operators

Number of connections between services operated by different carriers 0 1 2

Rail equivalent to the 30 most flown routes in the EU



Extended scope: rail equivalent to 50 routes among the most flown in the EU



Source: T&E • Research performed August 2025 - April 2026, on incumbent operators' booking engines from the departing and arriving countries of the routes studied.



To estimate the number of services operated by different carriers on routes studied we evaluated the most direct itineraries connecting origin and destinations, involving the fewest operators. For instance, to travel from Amsterdam to Milan, we considered Amsterdam-Paris-Milan, with Eurostar and Trenitalia France, or Eurostar and SNCF. In these two cases, the minimum number of services operated by different operators is two. See the [methodological note](#) for further details.

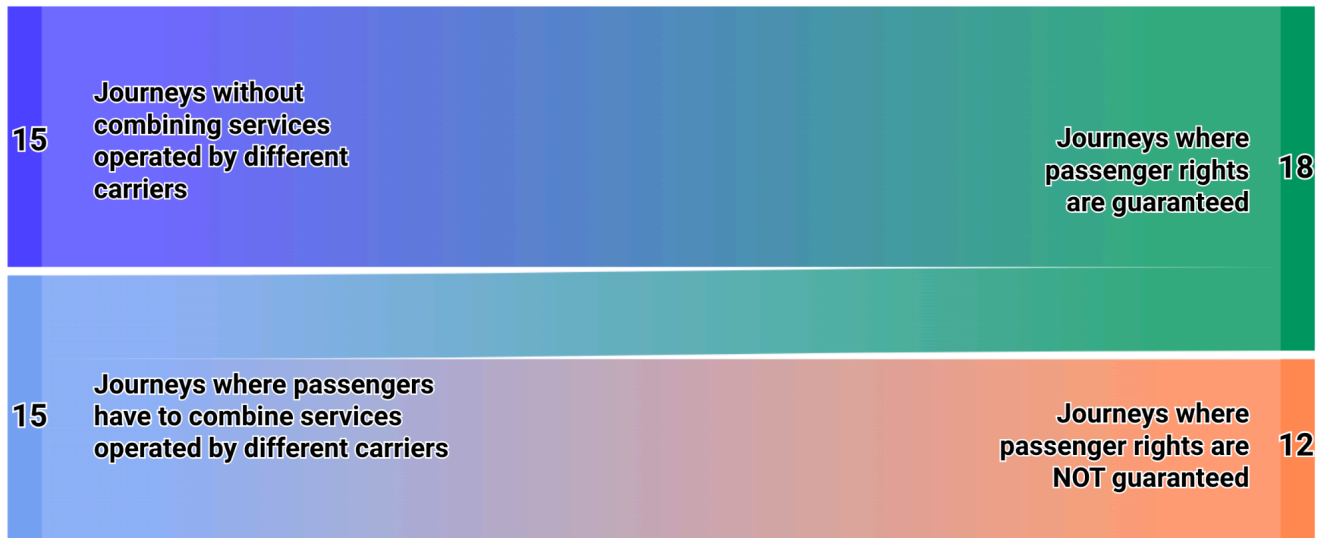
3.1.2 Passenger rights coverage on international routes


Passenger rights are not guaranteed on **40% of the rail equivalent journeys to the 30 most flown cross-border routes in Europe passenger rights**. Without a through-ticket, current EU regulation does not cover passengers in case of a missed connection. The AJC aims to fill this gap by allowing passengers to board the next available train at no extra cost when missing a connection between two signatory operators. Yet our investigation shows it does not cover all booking options available to passengers.

For instance, Paris-Vienna passengers can travel with SNCF to Stuttgart, then DB to Munich, then ÖBB to Vienna. All three operators are AJC signatories, so passengers should be covered for a missed connection. A more direct option exists: taking Westbahn from Stuttgart directly to Vienna. However, Westbahn is not an AJC signatory. Passengers choosing this route have no rights protection.

Passenger rights are not guaranteed on 40% of routes investigated

This is due to multi-operator journeys being insufficiently protected

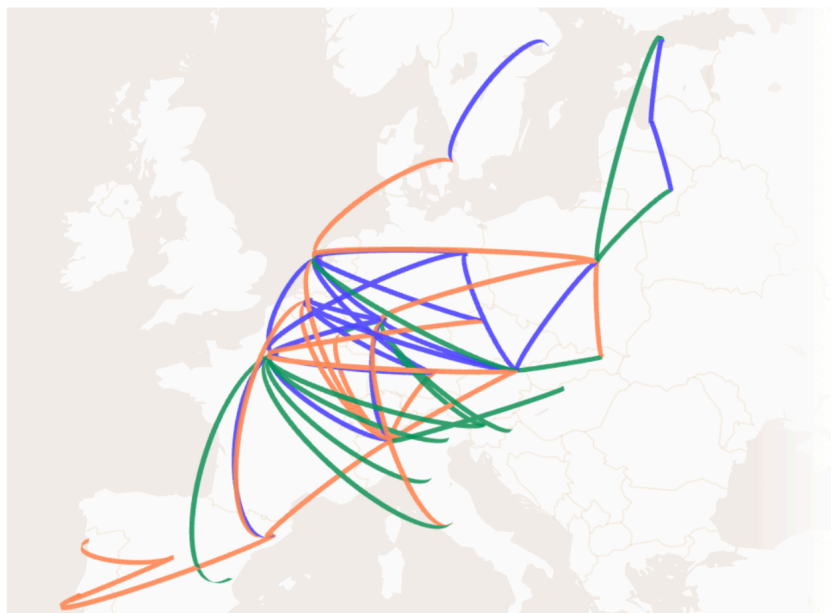


Source: T&E • Based on EU's 30 busiest cross-border aviation routes with rail equivalents under 1500 km. Considers EU 2021/782, AJC, HOTNAT, national regulations. March–April 2026. 

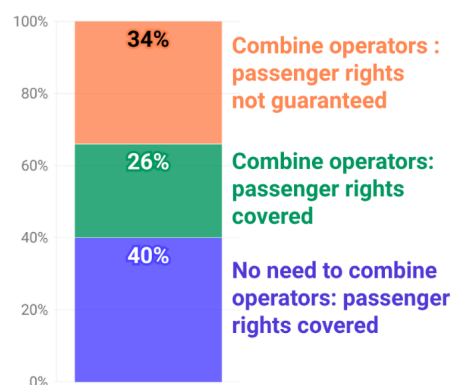
When extending the scope of our analysis, the conclusion remains: **for a third of rail equivalent journeys to 50 of the most flown routes in the EU, passenger rights are not guaranteed in case of a missed connection.**

On over a third of the routes investigated, passenger rights are not guaranteed

- No need to combine different operators - passenger rights covered
- Possibility to combine different operators - passenger rights covered
- Possibility to combine different operators - passenger rights not guaranteed



Percentage of international routes



Source: T&E • Based on 50 cross-border aviation routes with rail equivalents under 1500 km. Considers EU 2021/782, AJC, HOTNAT, national regulations. March–April 2026.



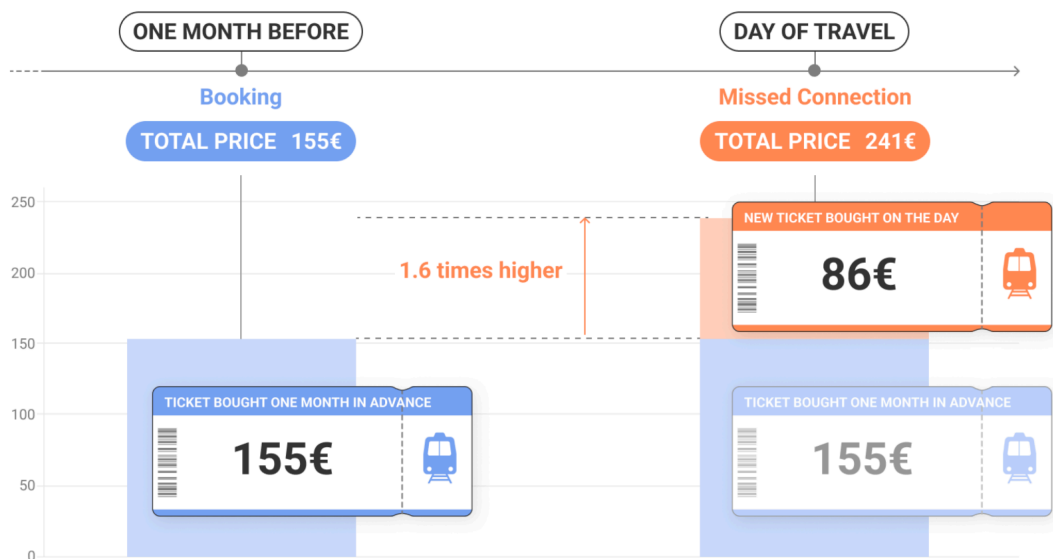
To assess routes where passenger rights are guaranteed we used the same itineraries and operators as in [section 3.1.1](#), investigating whether passenger rights were guaranteed based on current EU regulation, the AJC, HOTNAT, and bilateral or regional agreements between operators.

3.1.3 The cost of missing a cross-border connection

Missing a connection can be extremely costly. On the 12 routes where passenger rights are not guaranteed, we estimate **the average additional ticket cost from a missed connection increases the journey price by a factor of 1.6 (+ €86)**. This excludes accommodation and meals, though **in 50% of cases studied, a missed connection would require overnight accommodation.**

Missed international connections in Europe can increase overall travel costs by more than half

Regular journey Missed connection



Source: T&E • Average prices of a missed connection based on EU's 30 busiest aviation cross-border routes with rail equivalent under 1500 km where passenger rights are currently not covered. Prices were collected in April and May for trains departing in May.



Expanding the scope of our analysis to 50 international routes confirms this finding: On the 17 routes where passenger rights are not guaranteed, missing a connection increases the journey cost by a factor of 1.6 (+ €92) on average. In 38% of cases, passengers would also need to pay for overnight accommodation.

To estimate the price of a missed connection, we collected ticket prices for whole journeys for a trip departing in a month. We then collected ticket prices for the last leg of these journeys, but on the day of departure, to simulate the supplementary costs of buying a new ticket on the day of travel when missing a connection. For this analysis we did not take accommodation costs into account. Refer to the [methodological note](#) for further details.

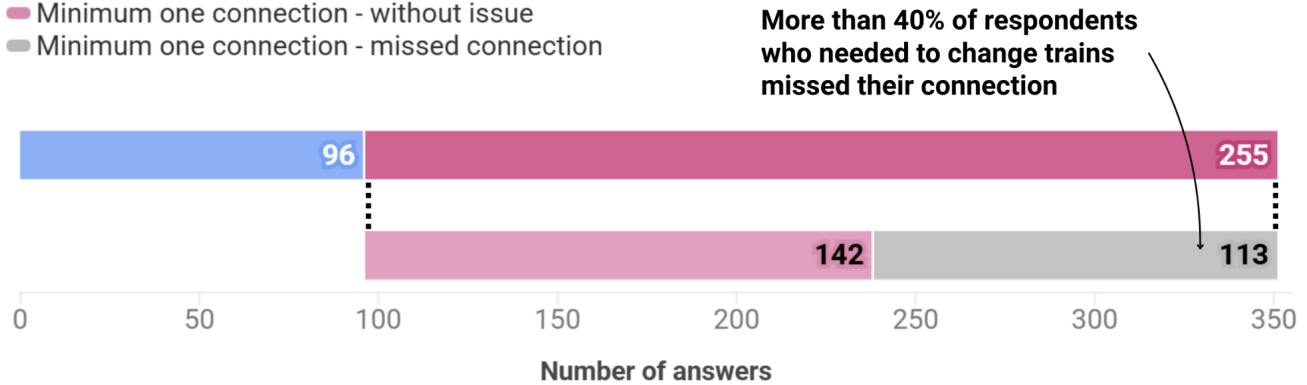
3.2 What are people's experiences with international rail travel?

In collaboration with Que Choisir Ensemble, we ran an online questionnaire on cross-border rail travel experiences, receiving more than 350 responses. **Over 100 participants (32%) reported missing a rail connection in Europe**, confirming that connection issues are a common part of long-distance rail travel.

Changing trains remains a challenge in Europe

A third of respondents missed a connection

- Travelled with no connection
- Minimum one connection
- Minimum one connection - without issue
- Minimum one connection - missed connection



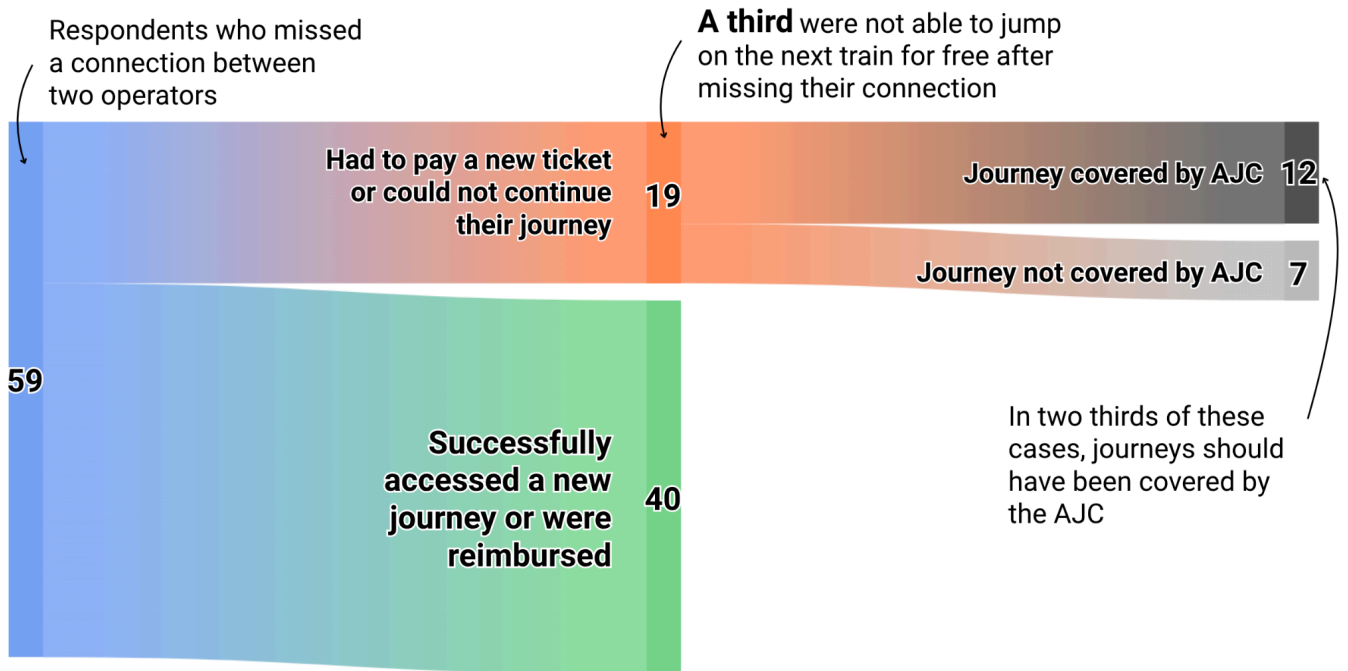
Source: T&E, Que Choisir Ensemble • Based on 351 answers from an online call for testimonials



While these answers should not be considered as a representative survey, it clearly shows examples where catching a rail connection represents a risk for rail travellers.

Among these passengers experiencing travel disruptions, 59 respondents (17% of all responses) reported missing a connection between two different rail operators, a situation not covered by the current European regulation. Of these 59 respondents, 40 were offered options to continue their journey at no extra cost. The other third of respondents who missed a connection between different operators **had to pay out of pocket or could not continue their journey**. In 12 of these testimonials, **passengers should have been covered by the AJC**.

Passengers risk not being covered in the case of a missed connection



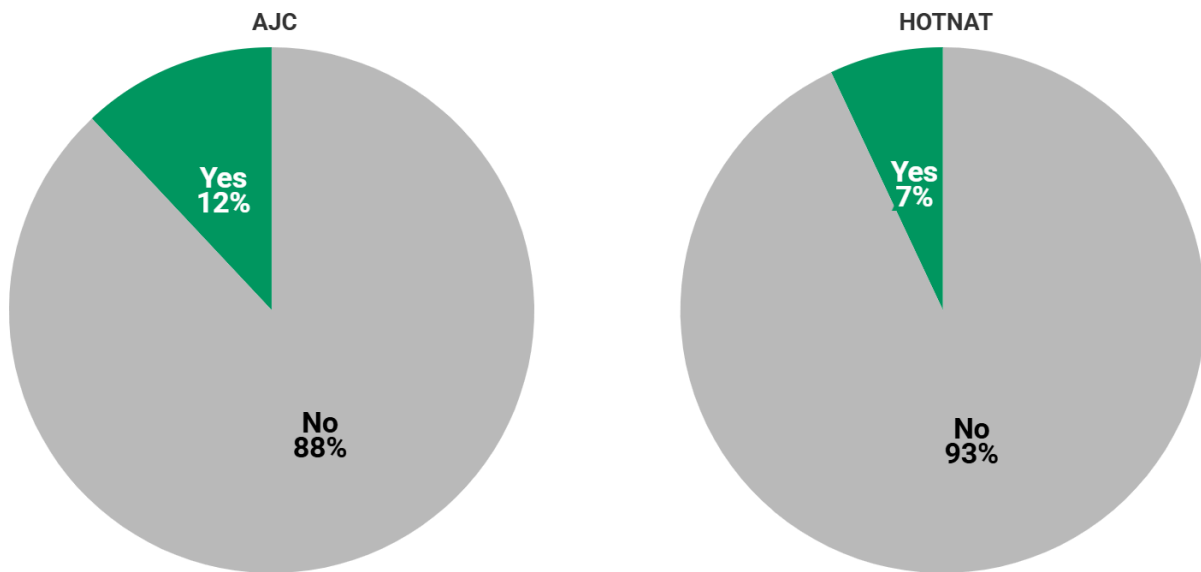
Source: T&E, Que Choisir Ensemble • Based on 351 answers from an online call for testimonials



These 12 passengers did not board the next available train at no extra cost, despite being entitled to do so under the AJC, likely because **none were aware of the scheme**. Of the total 352 respondents, **only 12% knew the AJC existed**. The AJC is not automated: if station or onboard staff are also unaware of it, passengers are far less likely to receive a replacement ticket. Only 7% of respondents were aware of HOTNAT.

The AJC and HOTNAT: a well-kept secret

Respondents' awareness of the AJC and HOTNAT



Source: T&E, Que Choisir Ensemble • Based on answers from an online call for testimonials (352 and 350 answers for the AJC and HOTNAT respectively)

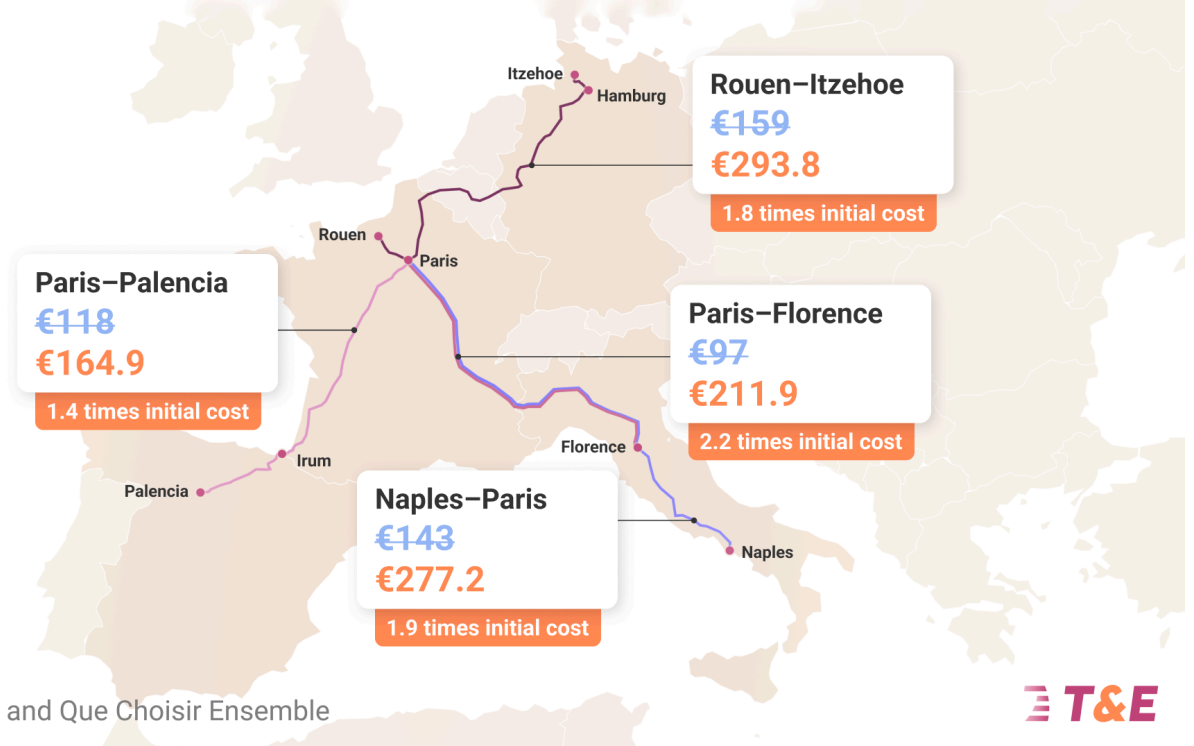


As we highlight in [section 3.1.3](#), missing a rail connection can lead to significant additional costs for passengers. The testimonials confirm our analysis. We contacted five respondents who reported a missed connection in which they had to buy a new ticket themselves, and asked for more details about their journeys. As highlighted in the two infographics below, across these five cases, **missing a rail connection almost doubled the price of the journey on average.**

The cost of a missed connection: insights from real travellers

■ Initially planned ■ Supplementary cost

Routes ■ Rouen–Itzehoe ■ Paris–Palencia ■ Paris–Florence ■ Paris–Naples



A respondent reported that while travelling between Seville and Paris they missed their Iryo connection in Madrid. This passenger had to pay a new ticket to reach Barcelona for **€69** and a hotel night for **€50, increasing their total journey cost by 40%**. They were never reimbursed for this new ticket or the hotel night.

Four out of five passengers had to pay accommodation themselves to catch a train on the next day, for costs **up to €124**. These testimonials highlight the importance of covering accommodation costs in the upcoming passenger rights revision.

Breaking down the costs of missing a connection in Spain: a traveller's story

■ Initially planned
 ■ Supplementary cost
 ■ Reimbursed cost
 — Route Paris–Seville



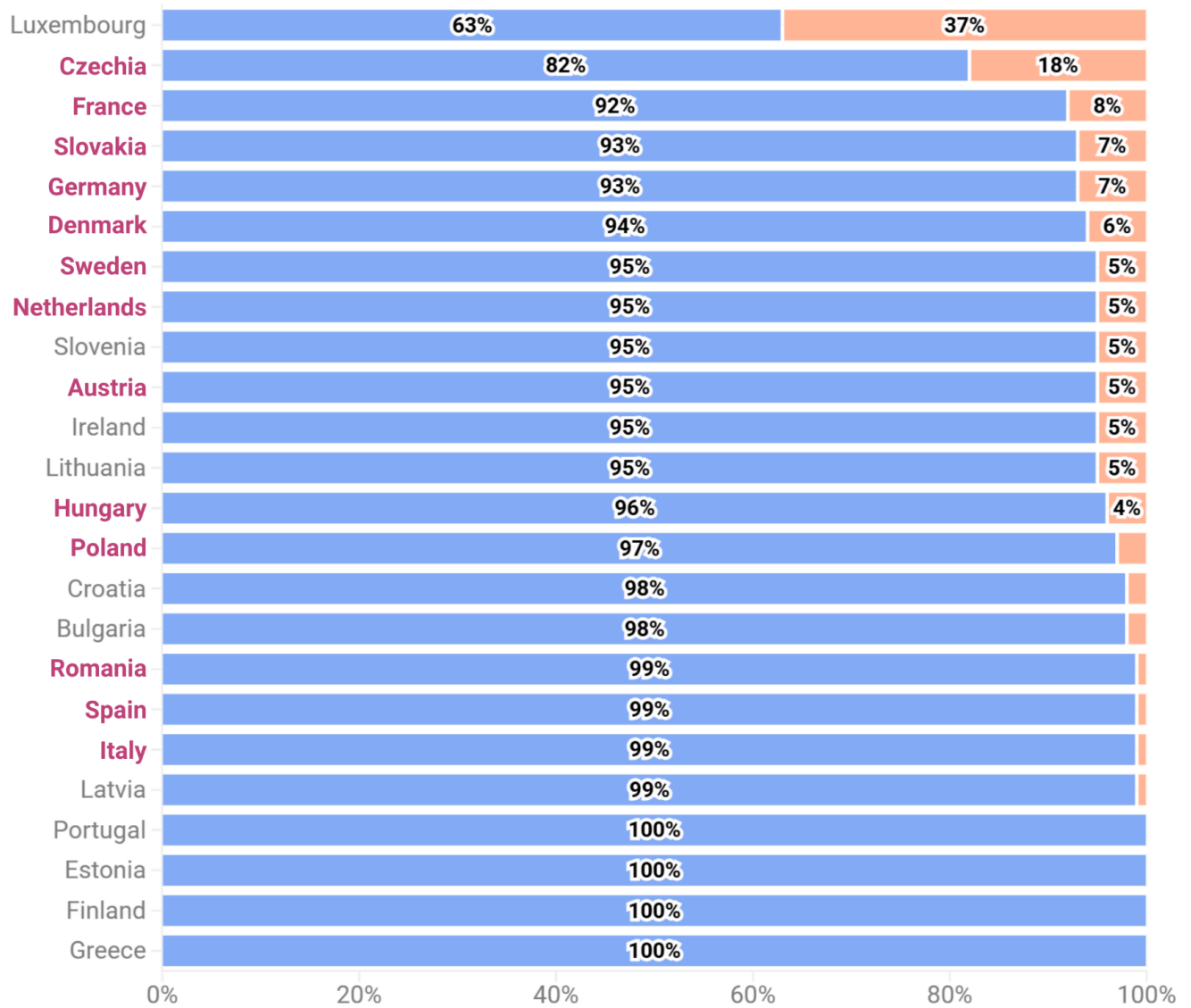
3.3 Why domestic passengers should not be left behind

Current EU regulation and the AJC do not cover domestic journeys, yet 95% of rail travel in Europe is domestic, according to Eurostat.

Most rail travellers are domestic, yet the AJC does not cover domestic travel and EU regulations leave multi-operator journeys unprotected

Passenger rights need to guarantee protection when combining multiple operators on a domestic journey, as domestic rail competition is already a reality for **13 Member States**

■ % of domestic passengers ■ % of international passengers



Source: T&E, Eurostat • Based on 2024 passenger data (in pkm), and domestic competition status as of June 2026. Belgium data are not publicly available



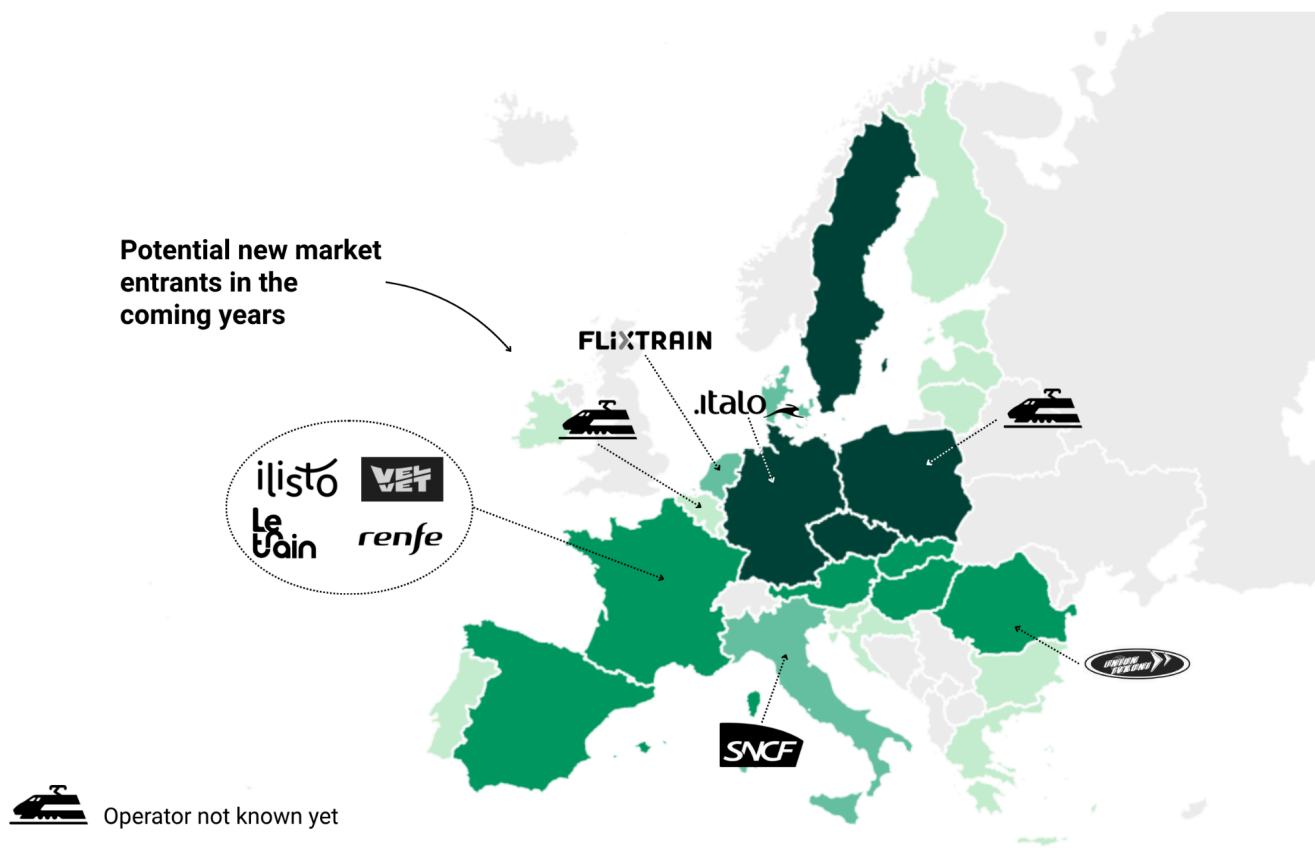
Competition in the rail market is already active in 13 Member States, and is increasing across the EU. The lack of passenger protection when combining operators might therefore increasingly become an important issue for passengers. Several rail operators are planning to launch operations on European domestic networks in the coming years.

Despite a growing number of operators on domestic markets, rail passengers are not protected when combining operators

Passenger rights need to be extended to fit a new era for Europe's railway sector

Number of passenger rail operators active in domestic markets as of 2026

One Two Three Five



Source: T&E • Not accounting for regional/local rail operators

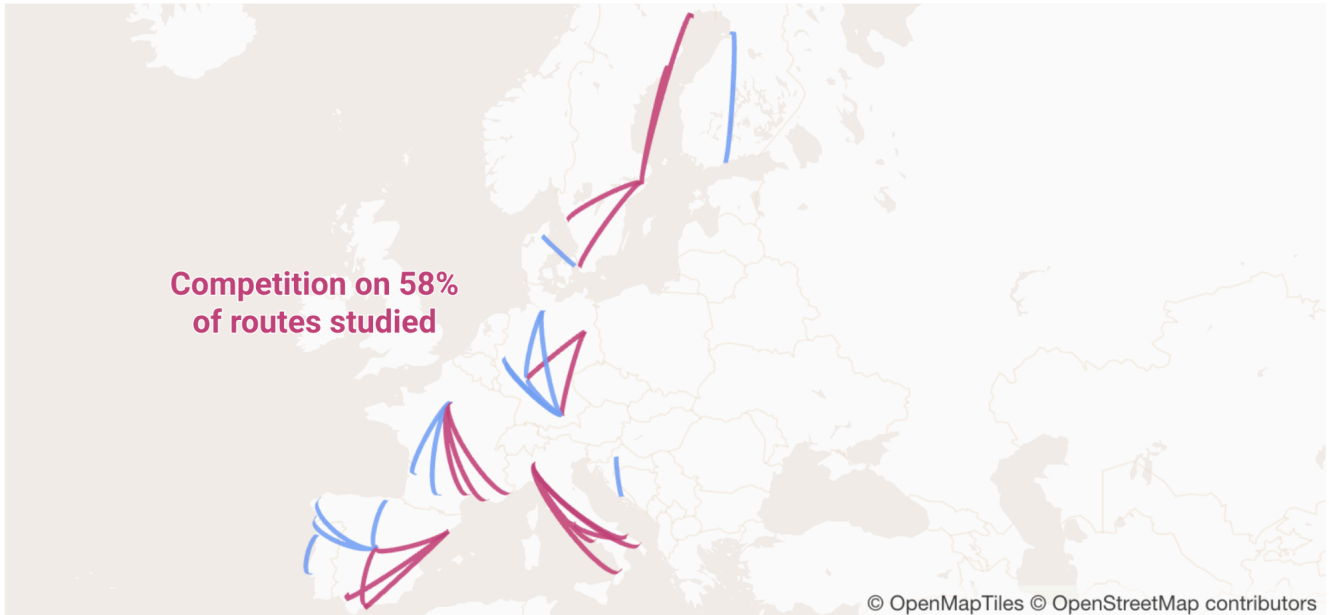


Our [previous report](#) showed that on rail equivalent routes to the busiest domestic aviation routes in the EU, passengers can already choose between operators. **On 58% of these routes, at least two operators run services on the same line for at least part of the journey.**

Several operators are active on more than half of the domestic routes studied

Current EU regulation does not cover passenger rights for journeys involving multiple operators

- Routes with a single operator
- Routes with several operators



Source: T&E • Based on rail equivalent to 33 domestic routes among the most flown in the EU. Research conducted between March-April 2026



Thanks to the EU Passenger Package, major rail operators will have at least to display all rail services operating in countries where they are dominant. This measure will increase the visibility of new entrants' services for passengers, opening up more opportunities to travel by combining several rail operators for domestic journeys. But how much would it cost to buy a new ticket for a missed connection on these routes where there is currently no passenger rights protection? As we highlight in the two case studies below, **paying an extra ticket on the day to reach a destination can cost up to 2.5 times the initial travel cost.**

Missing a domestic connection across two operators can be expensive

■ Initial cost ■ Supplementary cost



Source: T&E • Case studies based on two domestic routes where passengers can combine incumbent and new entrant operators. Prices collected in April and May for trains departing in May.



Rail competition gives passengers more travel options and lower prices. When Italy pioneered opening its high-speed rail market to competition in 2012, ticket prices fell by 30% and passenger numbers more than doubled. If the EU wants to reinforce passenger trust in rail travel, it must ensure that all passengers are protected in case of travel disruption, no matter how many rail operators they combine for their travel, whether abroad or within the same country.

4. Conclusion

It is undeniable that the EU Passenger Package is a huge step forward for passengers. Improvements on current conditions are worth defending as the EU Passenger Package moves through the EU Parliament, Council and Commission negotiations.

However, President von der Leyen's commitment to improving climate friendly cross-border rail travel will not be fully realised with the limitations of geographical scope on the hosting obligation proposal of large operators. To make it easier for people to book climate friendly journeys with full passenger protection by rail, EU decision makers must first focus on the need to expand the geographical scope of obligations on major operators. Decision makers must ensure single tickets can be booked on a single platform, and avoid limiting access to single tickets to a single transaction booking. Finally, we highlight the importance of ensuring that holders of existing public transport passes such as the Deutschland ticket can book single tickets so that other modal shift initiatives are harmonised.

5. Methodology

Data collection and analysis

5.1 Data review with operators and right of reply

All data collected for the research on booking possibilities and passenger rights coverage were shared with the relevant rail operators. This review process allowed them a right of reply to our claims, and to confirm or correct the information collected. Data shared with operators included:

- The itinerary considered to connect each city pair (one itinerary per city pair, as direct as possible, see [section 5.3.1](#)).
- The operators identified as operating passenger rail services for the given itineraries, and the minimum number of connections between services operated by different operators.
- Passenger rights coverage of each route.

From the 23 operators contacted, only Italo and Leo Express did not provide any feedback. Any developments in booking policies, service operation or passenger rights protection introduced after 1st of May 2026 were not considered in this research.

5.2 Selection of most flown routes in Europe

5.2.1 Selection process

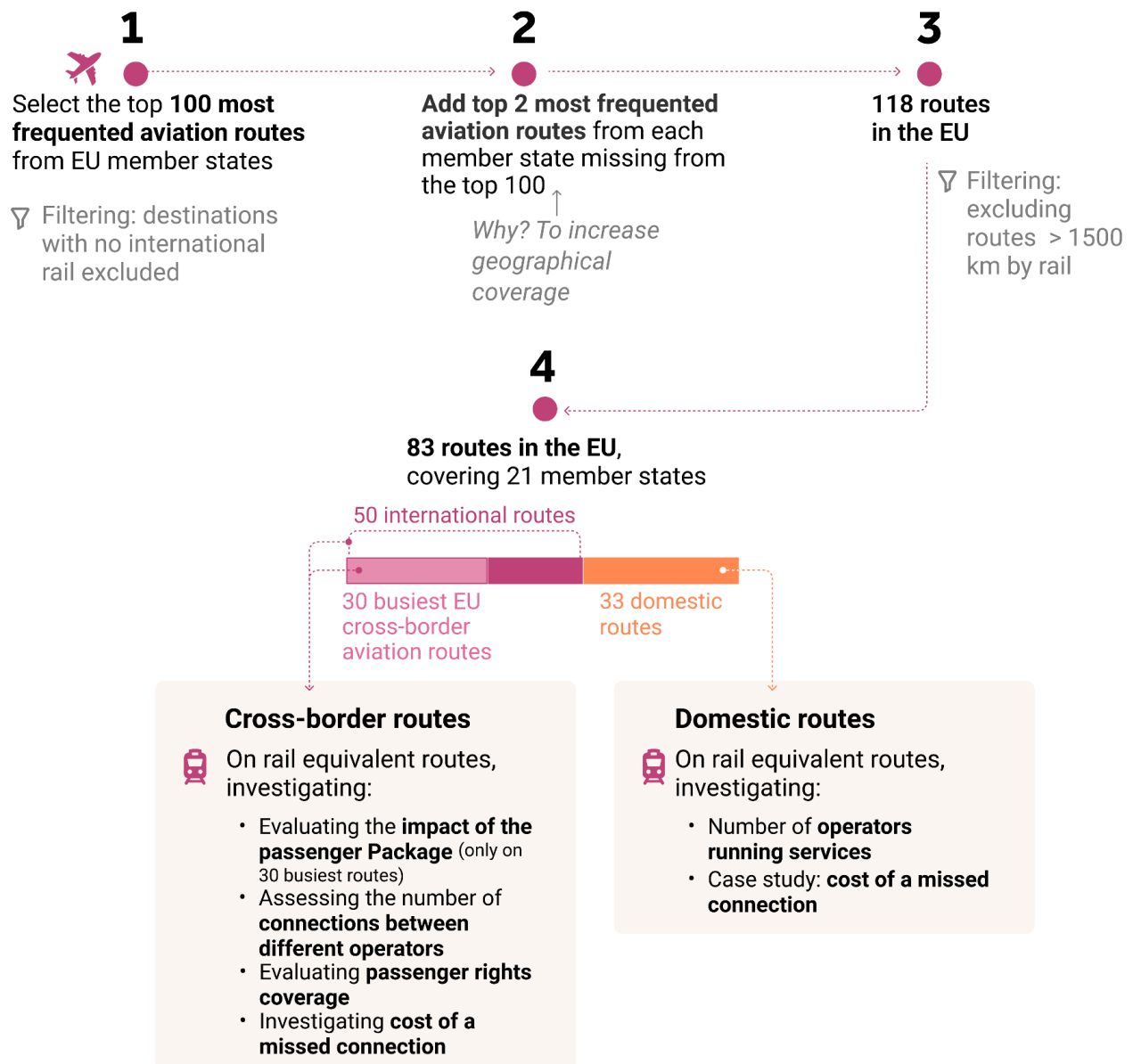
We used the same routes analysed in our [previous report](#) on the single ticketing package. These routes were selected based on flight frequencies. Using [OAG](#) data, we aggregated flight frequencies from 2024 per city pairs in the European Union. As shown on the infographic below, we first extracted the top 100 frequented EU routes (between Member States only), and excluded destinations that are impossible to reach by international rail. The list of excluded destinations is: EU Outermost regions; Cyprus; Ireland; Malta; Greece; Corsica; Sicily and Dubrovnik (Dubrovnik has no passenger rail station).

Since these top 100 routes are based on most connected hubs, it is *de facto* centred on Western Europe. To increase our geographical coverage, we identified Member States that were not represented in the top 100 routes, and added to our selection the top 2 destinations departing from each of these countries (applying the same exclusion criteria as above). After this step, our selection totalled 118 routes within the EU.

Finally we filtered our 118 routes based on rail journey distance, to exclude all journeys above 1500 km. We estimated rail journey distances using Google Maps Distance API. This resulted in a list of 83 routes within the EU, including 33 domestic and 50 international routes and covering 21 Member States. Due to this filtering, two Member States with international rail connections are not covered in our analysis: Bulgaria and Romania. The list of city pairs is available as an annex to this report.

Route selection and analysis process

Starting from the busiest aviation routes in the EU to investigate passenger rights coverage on rail equivalent journeys



Source: T&E, Aviation data from OAG (2024)



5.2.2 Analysis scopes: top 30 aviation routes vs extended geographical scope

All our analyses on cross-border routes were conducted on two route samples. First, we focused our research on a subset of 30 routes, which corresponds to the 30 cross-border routes that are the most frequently flown in the EU, and for which international rail equivalents are below 1500 km. In a second step, we extended our research to cover all the other international destinations identified thanks to our route selection process (see the above infographic). The impact analysis of the Passenger Package regulations was conducted only on the subset of the 30 busiest aviation routes.

5.3 Research process

All data analysed in this report was collected between March and April 2026. The final threshold date considered for data collection was the 1st of May 2026.

5.3.1 Itineraries selection and identification of active operators

Cross-border routes

For each city pair we selected a single itinerary, to represent the most direct travel option using only rail services. To select the most direct itineraries, we prioritised routes with the fewest connections and the fewest services operated by distinct rail carriers. Where a journey between two cities could be completed under a single operator or operator group, we systematically selected that option. For instance, to travel between Paris and Rome we considered Trenitalia France (Paris-Milan) and Trenitalia (Milan-Rome), as both services are operated by the same group. Alternative combinations such as SNCF for the Paris-Milan leg or Italo for the Milan-Rome leg were excluded. Such options would introduce an additional operator without reducing the number of connections.

Where no single-operator solution to connect city pairs was identified, we investigated all relevant operator combinations for each leg of the journey. In such cases at each intermediate city we considered all services available to passengers. For example, travelling from Milan to Vienna requires more than one operator and a change, typically in Venice. The Milan-Venice leg is operated by ÖBB, while onward services from Venice to Vienna are available with either Trenitalia or Italo. Both options are therefore retained, and two operator combinations were considered for this itinerary: ÖBB, Trenitalia and ÖBB, Italo.

Domestic routes

For domestic journeys, the most direct travel option always involves a single operator. We consequently adopted a different approach, drawing on [data from our previous analysis](#) on single ticketing. For each domestic route, we identified where competition between several operators was taking place. This allowed us to capture all operators active on a given corridor and consider the full range of travel options that passengers may face for their domestic journeys.

5.3.2 Passenger rights coverage on cross-border routes

For each cross-border route, based on selected itineraries, and identified operators, we assessed passenger rights coverage based on the following schemes:

- [EU 2021/782 regulation](#)
- Agreement on Journey Continuation ([AJC](#))
- Hop On The Next Available Train ([HOTNAT](#))
- Potential national schemes (such as [Resplus](#) in Sweden)
- Bilateral agreements or individual initiative from rail operators

We considered a route as covered where at least one of these schemes applied across all travel options. Conversely, where at least one travel option existed for which none of the above schemes applied, we considered passenger rights as not guaranteed for that route. It is important

to note that on the selected cross-border routes, we did not encounter any cases where HOTNAT applied without the AJC.

5.3.3 Price of a missed connection

Cross-border routes

For routes where we identified that passenger rights are not guaranteed, we conducted ticket price research to estimate the potential cost passengers could face in the event of a missed connection. Prices were collected directly from each rail operator's website. Research was carried out for journeys in both directions (e.g. both Barcelona-Brussels and Brussels-Barcelona), and was performed between one month to three weeks in advance of a hypothetical travel date. Hypothetical travel dates were set between 12 and 22 May and hypothetical booking dates between 15 and 23 April. For each route, we collected the price of the originally planned journey as well as the cost of rebooking the final leg on the day of travel following a missed connection. We then calculated the average cost of a journey booked in advance and the total final cost due to a missed connection. For each route, we also assessed whether a missed connection would require passengers to have an overnight stay to catch a train the next day (without collecting data for accommodation costs).

Domestic routes

For domestic routes, we conducted ticket price research based on two case studies: Brindisi-Milan for a travel with Trenitalia and Italo, and Berlin-Munich for a travel with DB and Flixtain. For each route, we identified the cheapest available option to connect the two cities, then collected the price of rebooking the missed connection on the day of travel. Price collection was carried out on 30 April for trains departing on 22 May. Prices were collected on rail operators' websites.

5.3.4 Impact of the Passenger Package regulations

Booking possibilities

Our analysis of the impact of the Passenger Package regulations focuses on hosting obligations, as the implications of sharing obligations are virtually impossible to forecast. Sharing obligations indeed depend on the willingness of ticketing platforms to incorporate individual operators.

The hosting obligation will mandate dominant ticketing platforms to resell, or display, tickets from any operator running services in the country where the platform is dominant. For our analysis we considered that operators will introduce requests for their service to be sold on dominant platforms. The hosting obligation indicates that the services that should be integrated in dominant booking platforms are the direct services arriving to or departing from the country where they hold market dominance, but no further. The legislation also indicates that when selling tickets, platforms shall not segment or sell under separate commercial transactions any journey which **can be sold under a single ticket**.

To assess whether a route would be affected by the upcoming regulations, our first step was to evaluate whether it is currently bookable on market-dominant platforms. To do so, we updated [our previous analysis](#) to incorporate recent developments on booking possibilities.

For routes that are currently not bookable from dominant platforms, we determined whether the scope of regulations would have any impact based on information described above. We considered a route to be covered by the scope of the regulations if the connection between the two cities consists of a direct service, arriving or departing from a country where the market-dominant platform is not currently proposing tickets for such journeys. The two examples below detail the situation of routes covered, or not covered by the current hosting obligation scope:

- Barcelona-Paris will be impacted by the regulations. SNCF operates direct services between the two cities. Tickets can currently be booked on SNCF connect, the dominant platform in France. However it is impossible to book these tickets on Renfe. Thanks to the hosting obligation, Renfe will be mandated to show SNCF services, and potentially propose them for booking if SNCF requests it.
- Paris-Rome will not be impacted by the regulations. There are no direct options for this journey, which requires a change in Milan. It is currently possible to book the whole journey as a through ticket on Trenitalia, the dominant platform in Italy. But it is impossible to do so on SNCF connect. It is currently possible to book SNCF TGVs that are stopping in Milan, but it is not possible to book the last Milan-Rome leg. The current scope of the hosting obligation will not mandate SNCF to sell (or display) the whole journey, as SNCF is not market dominant in Italy.

A route is also considered impacted where the journey is already bookable on a dominant platform, but only with separate transactions rather than as a single ticket.

Passenger rights coverage

Under the Passenger Package, travellers holding a single ticket will be entitled full passenger rights for their entire journey. Single tickets will be available for booking on rail operators' own booking engines and independent platforms. To assess which routes would have at least one booking option offering full passenger rights, we combined our forecast of booking possibilities from dominant rail operators' platforms under hosting obligations (as explained above) with booking possibilities across four independent platforms: Trainline, Omio, Rail Europe, and Kombo. Booking data for independent platforms is based on [our previous analysis](#).

5.4 T&E - Que Choisir Ensemble joint call for testimonials

In collaboration with the French consumer organisation Que Choisir Ensemble, we published an online call for testimonials on their website. Any user could participate and answer a questionnaire about their international rail experience. The call was online from 25 February to 02 April 2026.

The questionnaire contained 18 questions. The following are analysed in this report:

- Describe your journey (dates, departing and arriving cities/countries)

- Which rail operators did you travel with?
- During your journey, did you make at least one connection?
- If you missed your connection, how did you continue your journey?
 - I was able to board another train without needing a new ticket
 - I had to purchase a new ticket myself and was subsequently reimbursed
 - One of the operators provided me with a free new ticket
 - I had to purchase a new ticket myself and was not reimbursed
 - I was unable to continue my journey
 - Other
- If you missed your connection, was it a connection between two different rail operators?
- Do you know what the agreement on journey continuation, also known as AJC, is? (i.e. an agreement between several European rail operators entitling passengers to a free replacement ticket in the event of a missed connection)
- Do you know what the Hop On The Next Available Train scheme, also known as HOTNAT, is? (i.e. an agreement between several European rail operators entitling passengers to a free replacement ticket in the event of a missed connection)

Respondents were also allowed to provide a written answer to detail their travel. Data was cleaned to exclude duplicates and invalid answers. Invalid answers include for instance journeys outside of Europe, which are beyond the scope of this analysis.

While these testimonials represent invaluable examples of the situations that rail passengers are currently facing while travelling abroad, it is important to note that they cannot be generalised to all European rail travellers, as the pool of respondents cannot be considered a representative population sample.

We contacted five respondents who reported having missed a connection between two different rail operators and had not been provided with a free new ticket. We asked them to provide further details about their experience, information about the initial cost of their journey, the additional cost of their replacement ticket, and any potential accommodation expenses.

5.5 Share of domestic and international travellers among Member States

Percentages were based on millions of passenger kilometres for domestic and international travellers in each Member State, drawn from [Eurostat data](#). Belgian data were unavailable due to confidentiality.

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