

Press Release 06/2026

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## **AdC identifies constraints to the effective liberalisation of the rail sector in Portugal**

The Portuguese Competition Authority (AdC) has today launched a public consultation on the preliminary version of the study “Competition in the rail passenger and freight transport sector in Portugal”, in which it identifies constraints to the effective liberalisation of the sector and sets out 14 recommendations addressed to the Government, Infraestruturas de Portugal (IP), the Mobility and Transport Authority (AMT) and railway undertakings.

### **The study**

The study, carried out in a context of significant public investment — notably in the construction of high-speed lines and the renewal of rolling stock — concludes that substantial barriers to competition persist, particularly in rail passenger transport. It highlights, in particular, the absence of competition for the market through competitive tendering procedures for the award of public service contracts.

Among its key recommendations, the AdC advocates limiting the extension of the public service contract awarded to CP – Comboios de Portugal to the period strictly necessary for the amortisation of the announced investments. Upon expiry of that period, an international public tender should be launched for the award of new public service contracts. In the same vein, the AdC recommends that the current public service contract of Fertagus should not be further extended, in order to promote competition for the market.

The study further identifies obstacles relating to access to essential facilities and inputs for rail operations, namely rolling stock and skilled human resources, stressing that access to such inputs on fair, reasonable and non-discriminatory terms will be critical to ensuring effective competition in future tendering procedures. The AdC therefore puts forward concrete recommendations aimed at securing such access.

According to the AdC, the specific characteristics of the national rail network exacerbate barriers to entry, notably due to the need for rolling stock compatibility with the Iberian gauge and the CONVEL signalling system.

Barriers are also identified in relation to access to rail infrastructure and to ancillary services necessary for the provision of competitive commercial services, in particular in long-distance passenger transport and freight transport. In this context, the AdC issues an additional set of recommendations to mitigate such constraints.

The study also underlines the importance of ensuring effective and non-discriminatory access to ticketing data by alternative platforms, addressing recommendations to the Government and setting out best practices for passenger rail operators.

The AdC notes that the experience of rail liberalisation in several EU Member States has delivered benefits for users, including in terms of lower prices, improved quality of service, increased supply and innovation.

## **The public consultation**

The public consultation will run for a period of 20 working days, until 30 March 2026. Interested parties may submit comments or observations to the following email address: [consultapublica@concorrencia.pt](mailto:consultapublica@concorrencia.pt).

## **Recommendations**

The AdC's recommendations are as follows:

### To the Government

1. Adoption of a Rail Sector Code.
2. Review of the regime governing the validity of licences and reassessment of civil liability coverage requirements.
3. Limitation of the extension of CP – Comboios de Portugal's public service contract to the period strictly necessary for the amortisation of the investments carried out.
4. Launch, upon expiry of that period, of an international public tender for the award of new public service contracts.
5. Termination of the extension of Fertagus' public service contract, ensuring competition for the market.
6. Establishment of mechanisms to guarantee effective and non-discriminatory access to rolling stock, notably in the context of future public tenders.
7. Adoption of measures to facilitate the mobility of qualified human resources within the rail sector.
8. Ensuring effective and non-discriminatory access to ticketing information by alternative platforms.
9. Review of capacity allocation criteria.

### To Infraestruturas de Portugal (IP)

10. Adoption of best practices in the design of procurement procedures for railway rolling stock.
11. Review of capacity allocation criteria.
12. Adoption of best practices in the conclusion of framework agreements for capacity allocation.

### To the Mobility and Transport Authority (AMT)

13. Adoption of best practices in the conclusion of framework agreements for capacity allocation.

### To passenger rail operators

14. Adoption of best practices in the contracting of third-party ticketing services.