Campaign for Better Transport

Tunnel vision:

Seizing the international rail opportunity

November 2026



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Executive summary

The value of international rail

International rail plays a vital role in connecting the UK with mainland Europe, supporting tourism, business travel, trade and regional economic growth. The Channel Tunnel is a major strategic asset, offering passengers a convenient city-centre-to-city-centre alternative to flying, while providing businesses and the wider economy with an important route for international freight. Expanding international rail to more direct destinations would make it more affordable and accessible, delivering substantial benefits for passengers, businesses, the environment and the wider economy.

International rail journeys also produce up to 96% fewer emissions than equivalent flights. Shifting more passenger and freight journeys to rail would reduce transport emissions, reliance on fossil fuels and exposure to volatile aviation fuel prices. With growing demand for sustainable international travel, renewed support for closer UK–EU relations and increasing pressure on airport capacity, there is a compelling case for making greater use of the Channel Tunnel and strengthening the UK's international rail connections.

What our previous reports showed

Campaign for Better Transport's 2023 report *Plane Speaking: Moving journeys from air to rail*, demonstrated that travelling by rail for near-Europe journeys is not only much more environmentally friendly than flying but also in many cases cheaper, faster and more economically productive.

Then the 2025 report *Runways to Railways: Unlocking the potential of the Channel Tunnel*, demonstrated the considerable untapped potential of international rail. It found that less than half of the Channel Tunnel's passenger capacity and just 10% of its freight capacity was being used. It estimated that there was potential for passenger numbers to grow to 28.5 million per year by 2040, if new direct destinations were opened. However, the report also highlighted significant barriers to growth, including high fares, limited direct routes, inadequate station and depot capacity, lengthy border and security processes, and poor integration with domestic rail services.



The announced expansion plans could lead to

28 million

annual passenger journeys by 2040

A wave of progress

Since *Runways to Railways* was published, there has been a significant wave of progress towards expanding international rail services between the UK and Europe. Eurostar has announced plans to grow its fleet and to open up new direct services to Geneva and Frankfurt. New operators have advanced plans to enter the market, creating the prospect of increased competition, more frequent services and lower fares. Freight is also progressing with a Government-backed agreement to develop Barking Eurohub into an international logistics hub.

Political and diplomatic momentum has strengthened. Bilateral agreements and discussions with Germany and Switzerland have established new commitments to improving cross-border connectivity and addressing technical and regulatory barriers to direct services. HM Treasury and the Mayor of London have backed opening up Stratford station to international services. These developments demonstrate growing confidence in international rail and represent meaningful progress towards realising the Channel Tunnel's potential.

Realising the potential

Eurostar carried 11.8 million passengers through the Channel Tunnel in 2025, exceeding pre-pandemic levels. This report found the announced expansion plans by existing and potential new operators could lead to 24.5 million annual passenger journeys by 2031 and 28 million journeys by 2040 – getting us close to the 28.5 million we forecast in *Runways to Railways*.

This includes millions of passengers that could potentially shift short-haul air journeys to rail, thanks to increased frequencies to existing destinations and new direct connections. Expanding the international rail network, for both passengers and freight, could reduce pressure on airport capacity, while supporting the UK's climate commitments.

Barriers to growth

The prospect of new operators, additional routes and substantial investment in rolling stock demonstrates the potential for significant growth in both passenger and freight traffic. Yet this is far from guaranteed, as several interconnected barriers continue to constrain expansion:

- Depot capacity remains a critical obstacle for new entrants, while London St Pancras faces significant space and processing constraints.
- The continued closure of Ashford and Ebbsfleet to international services limits regional access and opportunities for economic regeneration.
- Border control and security checks add significant amounts of time, reducing international rail's journey time advantage to flying.
- High fares, fragmented ticketing and limited rail connections for onward journeys make travelling internationally by train more difficult for passengers outside London.
- International freight faces additional challenges, including incompatible loading gauges, limited consolidation facilities and insufficient terminal infrastructure.
- Rising business rates on international rail infrastructure and the unequal taxation treatment of rail and aviation risk undermining investment and the shift towards lower-carbon travel.

Recommendations

There needs to be stronger strategic coordination between Government, infrastructure managers, operators and European partners to convert recent investment and political commitments into an increased volume of operational services for both passengers and freight.

The Government and rail industry must now turn this wave of progress into a coherent programme for expanding international passenger and freight rail. This requires:

1. **aligning a strategic approach to international rail with the work of Great British Railways through the forthcoming Long-Term Rail Strategy**
2. **expanding and developing depot and station capacity, and investing in required network upgrades**
3. **developing proportionate and efficient border and security arrangements**
4. **improving onward connections and integrated ticketing across mainland Europe**
5. **supporting the growth of international rail freight**
6. **addressing the financial and tax imbalance between rail and aviation**

With the right policies and investment, the UK can make international rail a more affordable, accessible and attractive choice for passengers and businesses, supporting economic growth, stronger European connectivity and progress towards its climate objectives.



In 2025

less than half

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10%

of its freight capacity were used

Introduction

International high-speed rail has the potential to offer a more viable alternative to short-haul flights between the UK and mainland Europe.

Since services through the Channel Tunnel began in 1994, rail has grown to become an important mode of passenger travel and freight transit between the UK, France, Belgium and the Netherlands. Yet, despite this advance, there remains much potential for growth.

In 2023, Campaign for Better Transport published *Plane Speaking: Moving journeys from air to rail*, which made the case for demand management and modal shift from plane to train to reduce emissions from aviation.[1] It examined the top 23 domestic and near-Europe flights with a direct rail equivalent to see how they compare on cost, journey time, productivity and carbon emissions. It found travelling by rail is not only much more environmentally friendly than flying but also in many cases cheaper, faster and more economically productive.

This was followed by *Runways to Railways: Unlocking the Potential of the Channel Tunnel* in 2025.[2] It laid out the economic, social and environmental benefits of expanding international rail and the barriers preventing its growth.

We found that:

- Less than 50% of the Channel Tunnel's passenger capacity and 10% of freight capacity is currently being used
- When rail's door-to-door travel time is up to one hour longer than that of air travel, it can achieve a market share of 50% or higher
- By 2040, there is potential for rail passenger numbers to grow from the current 11.2 million to 28.5 million per year (i.e. 17.3 million additional passengers) to European cities (including Cologne, Frankfurt, Geneva, Zurich, Lyon and Marseille), if direct services were provided
- This could translate to over £1 billion visitor tourism spend in the UK alone per year

To fulfil this potential, the report recommended that:

- The Government should develop an international rail strategy
- The Office of Rail and Road (ORR) and Government should attract prospective new operators
- The UK Government and industry should work with the EU and European governments and industry partners to enable direct services to more European cities
- Infrastructure managers, supported by the Government, should facilitate the reopening of Ashford and Ebbsfleet stations and deploy Stratford International
- The Government should work with EU partners to streamline security and border control checks
- UK-based and European train operators should collaborate to improve integrated connections and ticketing for onward travel
- The Government and industry should improve UK rail connectivity and pricing
- The Government should tax aviation fairly

A year on, the international rail landscape has shifted significantly; in some respects, faster than many anticipated. Several new passenger operators are preparing to enter the market, bilateral discussions on services with Germany and Switzerland are advancing, and investment in new rolling stock has been confirmed.

At the same time, the growing urgency of the need to reduce carbon pollution from transport and to boost economic growth, as well as uncertainty over energy security and jet fuel price volatility, have strengthened the case for making rail available to significantly more people as the first choice for international travel.

Yet some of the structural barriers remain. Without action, recent momentum will not generate the increased service levels and extended route capacity forecast.

This paper draws on data analysis and the insights from two roundtables bringing together senior representatives from rail operators, infrastructure providers, regulators and government. It takes stock of what has changed, reviews the progress on our previous recommendations and outlines the next steps required for international rail to help the UK meet its economic growth and carbon reduction ambitions.

Recent developments

Since the publication of our previous report, *Runways to Railways*, several significant developments have started reshaping the international rail landscape.



New operators are entering the market

The entry of new international rail operators in the UK could lead to expanded services, higher standards and lowered average fares, helping the whole international rail market grow at the expense of short-haul flights. There are examples of this happening across Europe. For example, in Italy, when Italo entered the market, rail prices fell by 40% and passenger numbers increased overall, and in France since Trenitalia began operating along the Paris-Lyon-Milan route, prices have dropped by 43%.[3]

So far, the following announcements had been made from existing and new operators:

- The ORR has granted new operator Virgin Trains (formerly known as VTE Holdings Limited) access to Eurostar's depot at Temple Mills and pre-approved a new framework track access agreement between HS1 Limited and Virgin Trains.[4] Virgin Trains aspires to operate up to 20 new daily return services between London and Paris, Brussels or Amsterdam between 1 October 2030 and 31 December 2040. Virgin has confirmed they would stop at Ashford and Ebbsfleet, if stations there are operational, and is also considering Stratford as a possible destination.[5]
- Trenitalia, Italy's state railway, is planning to run a Paris-London service from 2029, having secured depot space in Maisons-Alfort Pompadour, southeast of Paris. Trenitalia aspires to operate up to ten new daily return services between London and Paris from December.[6]
- Gemini Trains is working with Siemens, Rock Rail and Uber to pursue running services between London, Paris, Brussels and Cologne. At present, they do not have a depot or track access, but have been exploring options for new depot sites in Kent.[7]
- Existing operator Eurostar is also planning route expansion. It has signed a Memorandum of Understanding (MoU) with Deutsche Bahn committing to pursue direct high-speed services (four services daily) linking London with Cologne (in four hours) and Frankfurt (in five-plus hours) in the early 2030s. Eurostar has also signed a similar MOU with Swiss operator SBB to pursue services between London and Switzerland; three times a day to Geneva, which will take five hours and 20 minutes.[8]



Rolling stock and infrastructure investment is accelerating

- Eurostar has committed to up to 50 new Alstom Avelia Horizon trains (with 30 firm orders placed). These will replace existing rolling stock and provide capacity for growth. Delivery of the units is scheduled for January 2031 with commercial operation beginning in May of that year.[9]
- Virgin Trains is procuring 12 Avelia Stream trainsets.
- Trenitalia has ordered 19 Hitachi Frecciarossa 1,000, ten of which will be used on the Paris-London route and the others on the French domestic market and the Paris-Milan route.
- Freight has also seen progress: in a Government-backed deal, Network Rail and its property development company Platform4 have taken long-term control over the Barking Eurohub site in east London. There are plans for around £15 million of investment to transform it into an international logistics hub, which will support regular freight trains through the Channel Tunnel.[10]



Political and diplomatic momentum

- Memorandums of Understanding between the UK and Germany, and the UK and Switzerland, have established bilateral taskforces exploring new routes and addressing technical barriers including border controls and safety certification.
- In July 2025, the UK and Germany signed the Kensington Treaty, which states both parties' commitments to enhance transport connectivity, with specific commitments to seek to facilitate direct long distance rail passenger services between both countries. The treaty also states commitment to promoting smoother border processing.[11]
- The UK is engaging with the EU on wider discussions on 'resetting' relationships over issues including business travel and professional qualifications recognition, defence and security and E-gates. The restoration of the Erasmus programme signals willingness for greater UK–EU collaboration, despite uncertainty over other core issues and timetabling for expected deals. Roundtable participants identified the potential for international rail travel to benefit from quicker and less resource-intensive border processes, which is key to supporting connectivity between the UK and European partners.
- In the Autumn 2026 Budget, HM Treasury backed a £20 million plan by the Mayor of London to enable international rail services to stop at Stratford.



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The growth potential

International rail services run through the Channel Tunnel on the HS1 High Speed line from London St Pancras International – currently the sole active UK rail terminal for international services.

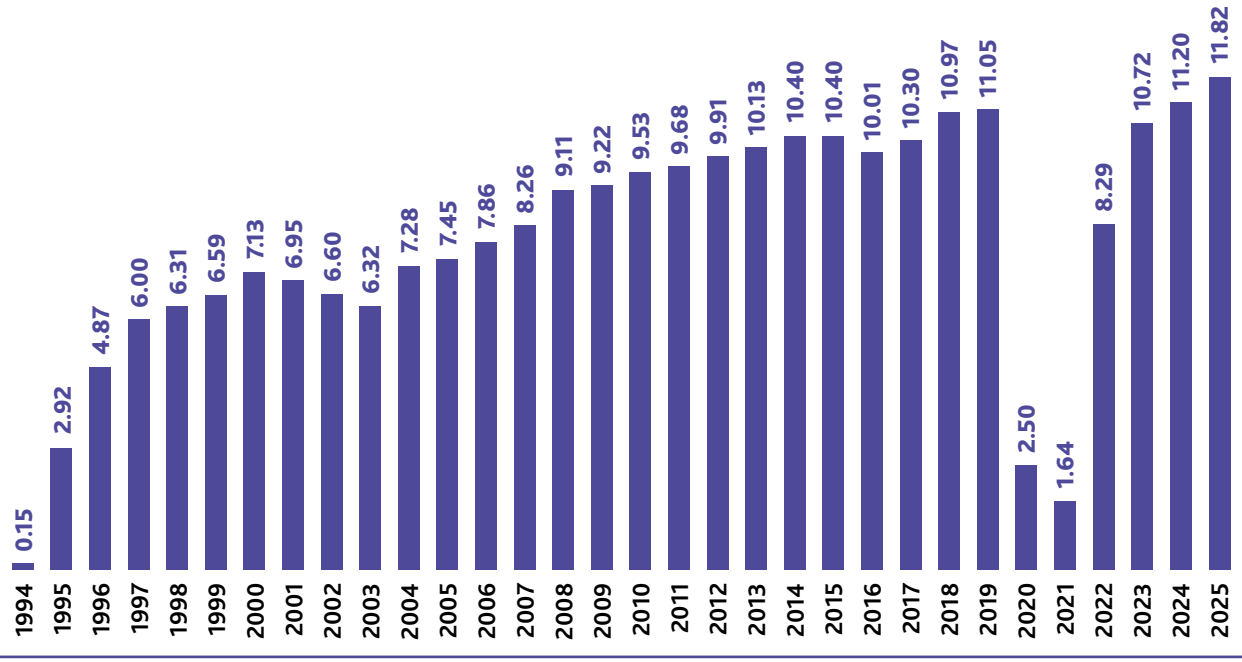
Both London St Pancras Station and the HS1 line are owned by the government and managed under a concession until 2040 by the company London St Pancras Highspeed (formerly HS1 Ltd). The tunnel is managed and operated as a concession by Eurotunnel, a subsidiary of Getlink (formerly Groupe Eurotunnel).[12] The ORR acts as the independent economic and safety regulator, and in a joint capacity for the tunnel.

Eurostar is currently the only operator running international passenger services through the Channel Tunnel and using the Temple Mills depot in Leyton, East London – the only depot in the UK currently able to stable and maintain rolling stock used for international passenger fleets. Prior to 2020, Eurostar services stopped at two additional stations, Ashford and Ebbsfleet in Kent, but these were closed during the pandemic. Stratford was also constructed as part of the HS1 project to accommodate future international trains, with construction completed in 2006. However, international services have yet to stop there.

Since the start of international rail services, passenger journeys have steadily grown, with the exception of major disruption periods such as the pandemic. Some direct services (such as to Disneyland Paris, Lyon, Avignon and Marseille) and the intermediate Kent stops at Ebbsfleet and Ashford International were suspended as a result. Nevertheless, passenger numbers on Eurostar services through the Channel tunnel increased from 11 million passengers in 2019 to 11.8 million in 2025 (see Figure 1).[13] This represents a 7.3% increase in passengers compared to pre-pandemic and a compound annual growth rate of approximately 2%. Prior to the pandemic, annualised growth averaged 2.3% between 2000 and 2019.

The London-Amsterdam route experienced substantial growth in 2025, with passenger numbers increasing by 18.3% compared with 2024. This followed the reopening of direct services from Amsterdam Centraal in February 2025, with capacity further expanded through the introduction of a fifth daily service in December 2025.

Figure 1: Annual cross-channel Eurostar passenger numbers (millions)[14]



The Channel Tunnel is also an important freight route, serving customers including the automotive and consumer goods industries. In 2000, approximately three million tonnes of cargo was carried through the tunnel. However, freight has not seen the same upward growth trajectory as passenger volumes (see Figure 2), due to challenges explored in the next chapter.

Based on announced plans, there is potential for

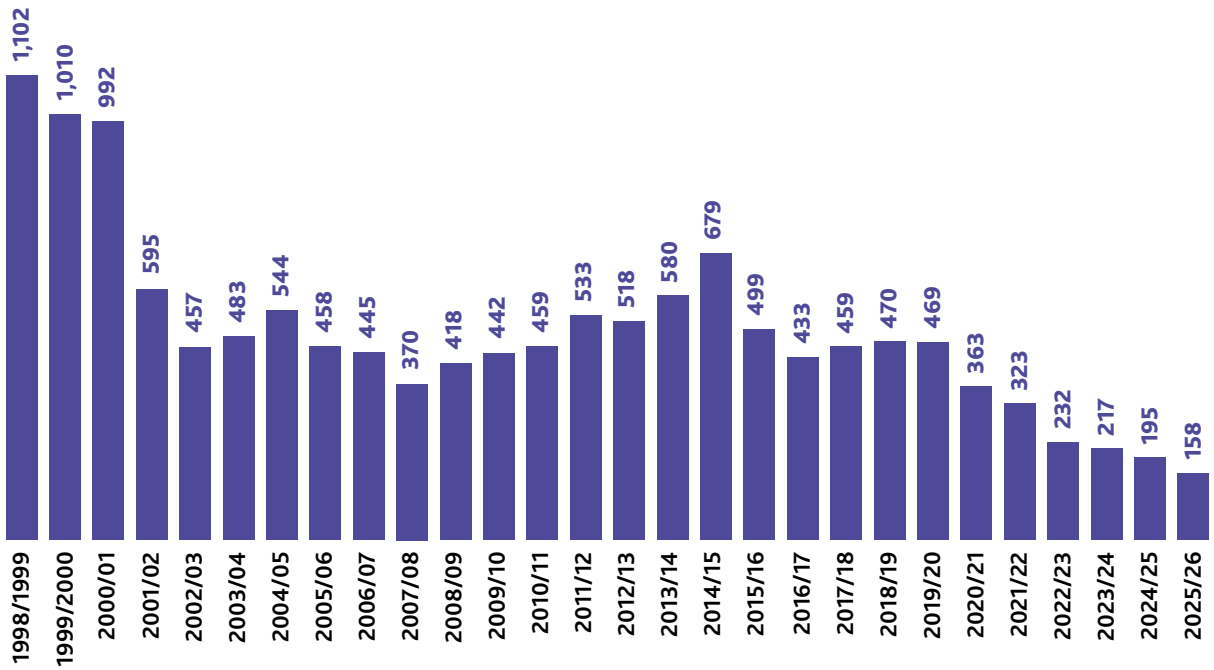
24.5 million

passenger journeys through the Channel Tunnel by 2031 and

28 million

by 2040

Figure 2: International freight moved (million net tonne kilometres)[15]



1. Potential passenger journey growth

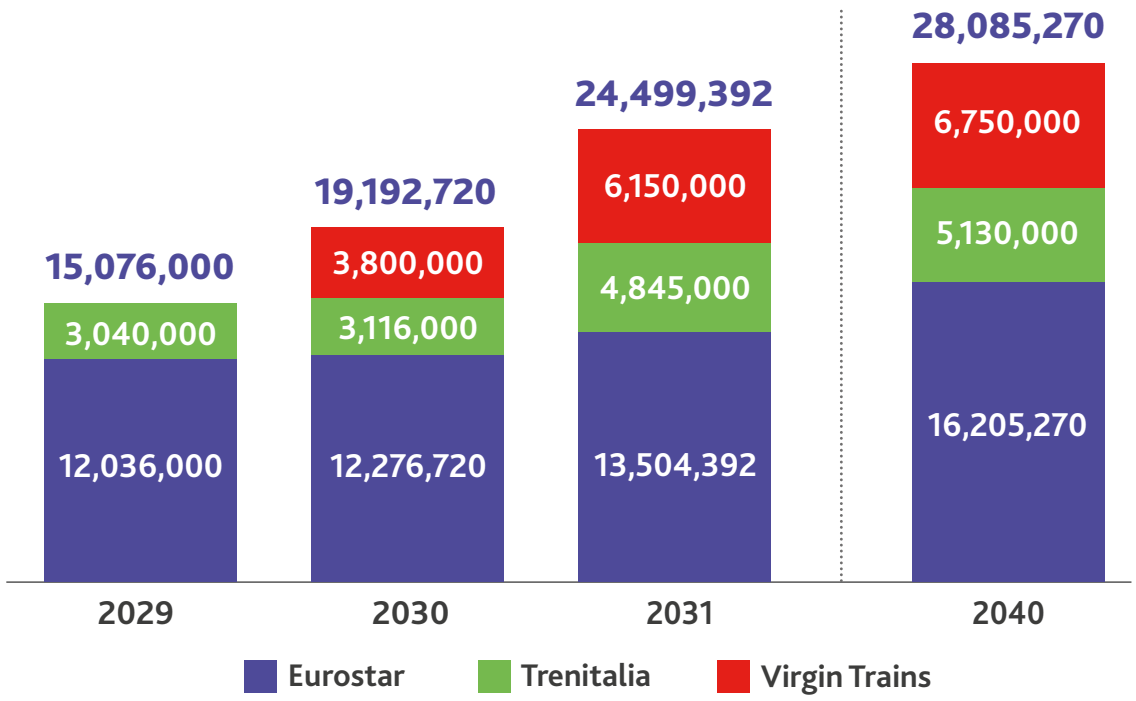
The entry of additional operators into the market serving more destinations, and the investment in new fleets by both existing and new operators, has the potential to substantially increase the number of passengers travelling through the Channel Tunnel.[16] Based on rolling stock orders and announcements of planned services from operators, the available seats per year could grow substantially.

Seating capacity will increase gradually as operators bring services into operation. For example, Trenitalia's rolling stock for the Paris-London service will be delivered progressively from the second half of 2029, with 2031 being the first year of operation at full capacity. From that year onwards, they expect to offer approximately 5.7 million seats annually on the Paris-London route. Similarly, Virgin Train services are expected to commence in 2030, with capacity increasing progressively thereafter until full operations are achieved.[17] Gemini has developed proposed timetables, engaged with infrastructure managers, identified rolling stock requirements and outlined an ambitious international route network. However, the operator is yet to secure depot space or place rolling stock orders.

Our calculations, based on announced plans by existing and potential new operators, suggest that by 2031 there would be potential for 24.5 million passenger journeys through the Channel Tunnel (see Figure 3) – more than double the 11.8 million carried in 2025 – **and 28 million by 2040**. This is on par against our previous report's estimate for 28.5 million by 2040.

However, the ability to reach this potential will depend on many factors including: potential new operators' ability to overcome commercial, financial and regulatory hurdles to fulfil their plans, operational and infrastructure constraints, and the routes available. None of the three potential new operators have yet formally proposed any new destinations. Subsequent chapters examine ways to overcome any known barriers to growth.

Figure 3: Projections for annual passenger numbers on planned cross-Channel services[18]



2. Potential business travel growth

Business travel plays a vital role in the economy. There were 6.8 million inbound business visits to the UK across all transport modes in 2024.[19] While aviation continues to accommodate substantial volumes of international business travel,[20] international rail provides a more sustainable alternative for journeys between London and major European cities. Eurostar estimates that its services generated approximately 150,000 additional inbound business trips to the UK in 2025 that would not otherwise have taken place, supporting an estimated £115 million in additional annual expenditure in the UK.[21] With additional services planned, there is substantial potential both to attract passengers from aviation and to stimulate additional business travel.

Providing direct city centre to city centre connections, rail compares favourably to having to travel to and from the airports at both ends. Rail also offers a productivity advantage, with business travellers able to work online for the duration, compared to needing to switch to offline mode on planes. Eurostar estimates that in 2025, working time available on board, combined with travel time savings on some routes, generated £339 million in productivity benefits, saving the equivalent of 332,000 additional working days compared to air travel.[22]

Our 2023 report *Plane Speaking* called for businesses and government departments to adopt a 'rail first' corporate travel policy for employees, recommending that business organisations promote rail travel as best practice.[23]

Over recent years, many large businesses have begun to implement sustainable travel policies prompted by the need to measure and reduce the environmental footprint of business travel. A survey of European travel managers found that 30% of organisations have policies that encourage modal shift from planes to trains where feasible.[24]

Campaign organisation T&E produces an annual Travel Smart Ranking, a benchmarking exercise that assesses major companies on their efforts to reduce emissions from corporate air travel. Their reporting shows that many large global companies, such as Fidelity International, Abrdn, AstraZeneca and Lloyds Banking Group, all set targets for reducing transport related emissions by prioritising rail, and have achieved substantial reductions over the last five years.[25] However, there remains substantial progress to be made towards transitioning international business travel from air to rail. According to a 2026 international study by Areka Consulting, air travel accounted for 81% of CO_2 emissions associated with business travel booked through travel management companies, compared with approximately 2% from rail.[26]

Our research and best practice examples suggest that pivoting towards a successful 'rail first' travel strategy requires the following measures:

1. **Decision makers in place** – Many businesses have created a dedicated travel or sustainability director who identifies obstacles, oversees the implementation of new booking tools and monitors their success.
2. **Effective data management** – Businesses must be able to clearly view data on employee travel patterns, enabling a clear interpretation of the impact of travel policies and procedures.
3. **Communicating with staff** – Campaigns to communicate the value of sustainable travel initiatives and how employees can adapt their travel practices to meet organisational goals are essential for maintaining engagement.
4. **Effective booking tools** – booking platforms should be able to display the range of options available for travel, clearly identifying ways in which rail can be used for single and multi-trip travel. This will provide the same confidence employees have when booking air travel.

Case Study: Arcadis

Arcadis, a global design and engineering consultancy employing approximately 34,000 people worldwide, has around 10,000 frequent business travellers, representing approximately 30% of its workforce. Its travel policy stipulates that any journey of less than 700 kilometres, where rail options are available, should be made via rail.[27] Other measures included carbon budgets for travel, tools to forecast emissions pre-trip, and a 'zero-based' travel carbon budgeting tool, which combines cost and emissions data to optimise travel planning in line with the company's net zero objectives. This enables Arcadis to generate detailed reporting on environmental progress against internal targets, down to project level. Supporting employees to shift travel choices was key to the policy working. Arcadis developed the Travel Sustainability Hub, a central source of information on carbon accounting methodologies, calculators and resources for low-carbon travel.

Case Study: ABN AMRO

In 2018, ABN AMRO set their first target to reduce the number of flights by 50% by 2025. They established a 'rail over air' policy which mandated that trips up to 700 km within Europe should be taken by rail as much as possible, and in 2025 applied a maximum carbon budget for business travel for each department. Seventy per cent of all trips between the Netherlands and London are now by train.[28] To successfully enact this, the organisation developed tools for management and staff - including a decision tree, online dashboard and booking system. They now aim to reduce 91% of total scope 1, scope 2, and business travel emissions by year end 2030.[29]

Case Study: Fidelity International

Fidelity International provides investment management services including mutual funds, pension management, and fund platforms to private and institutional investors. In 2019, Fidelity set a target to achieve Net Zero greenhouse gas emissions by 2030 for their corporate operations, including business travel. By the end of 2025, they had reduced the emissions associated with their business travel by 68%. This progress has been achieved through a combination of internal policies and promoting sustainable decisions, including a robust approval process for travel particularly focusing on non-client facing roles, customising booking tools with messaging to highlight sustainable options, and encouraging employees to combine multiple purposes into a single trip with their 'travel less, stay longer' approach. Throughout all of this, Fidelity's global travel management team has worked collaboratively with the sustainability team to ensure alignment of strategy, aims, and overall objectives.

Examples of governments showing leadership for sustainable travel

Spain's Sustainable Mobility Law requires organisations to develop measures to encourage collective and low-emission transport, active mobility, and teleworking options as well as submit biannual progress reports.

The French government asks its staff to take the train instead of the plane for journeys that can be made in less than four hours by train as from January 2024 (the threshold is expressed in terms of rail journey time rather than total door-to-door travel time), aiming at a reduction of 20% of outbound journeys by air compared with 2019. The ambition of this target increases to a reduction of 30% by 2027.[30]

3. Potential freight growth



Freight is essential to the UK economy, but domestic goods movement remains heavily reliant on road haulage. According to the ORR, 17.6 million tonnes of goods were transported by rail in Great Britain between April and June 2026, representing 4.135 billion net tonne-kilometres of freight movement. Rail accounted for approximately 8% of total domestic freight moved in 2024, compared with 82% transported by road and 10% by water.[31] As part of the Railways Bill, the UK government has now set a target that domestic rail freight should grow by 40% by 2040.[32]

Analysis in 2022 found that international rail freight accounted for only 1.6% of all rail freight moved in Britain, the lowest proportion since the Tunnel opened.[33] On average, just four freight trains pass through the Channel Tunnel every day.[34] There is a substantial gap between the potential role of rail in cross-Channel logistics and its current use. Unlocking the barriers to growth can see international rail contribute towards the freight growth target.

The importance of expanding international rail

Campaign for Better Transport's *Runways to Railways* report clearly outlined the case for expanding international rail capacity. Yet, its importance has increased even since then, with several factors now making action particularly urgent.

1. Good economic growth



The Channel Tunnel offers an important avenue for economic growth, supporting tourism, business travel and job creation in the UK. In 2024, the UK received around 42.6 million visits from overseas, including approximately 6.5 million from France, Belgium and the Netherlands, the three main countries directly served by Eurostar. Around 3.2 million of these visitors arrived by air, compared with 2.3 million through the Channel Tunnel, including by Eurostar and vehicle shuttle services.[35]

International rail also helps generate tourism that might not otherwise take place. Research commissioned by Eurostar estimates that its services result in an additional 500,000 tourist visits to the UK each year, generating £370 million in additional spending in London and beyond.[36]

Reopening of stations that were closed during the pandemic could extend this growth. Return of international services to Ashford is estimated to generate between £126 million and £315 million in additional visitor spending each year for the local economy (depending on passenger number assumptions).[37]

Furthermore, international rail connectivity can prompt substantial urban redevelopment, regeneration and growth. One in 20 businesses near London St Pancras cite the international terminal as a factor in choosing to locate to the Kings Cross St Pancras area; and the number of jobs in the area has trebled from around 8,700 to 27,700 between 2009 and 2019.[38] Similar growth could be seen at Stratford, Ebbsfleet and Ashford, if international services were to run there. Improved feeder services to these stations would open international travel to passengers and extend freight potential across other regions, alleviating road capacity constraints.

2. Energy security



The ongoing conflict in the Middle East has created significant disruption to both road vehicle and jet fuel supply chains. Global jet fuel prices rose by 121% year-on-year between April 2025 and April 2026.[39] Compared to other countries, the UK has seen the highest additional jet fuel import costs.[40] While the present situation may be temporary, it has strengthened the case for alternative modes of international travel which are better protected against such volatility.

Some identify Sustainable Aviation Fuel (SAF) as a partial solution to energy price volatility and security. However, despite a growing number of SAF production projects, global SAF output is a fraction of total jet fuel demand.[41] Furthermore, such projects have extensive development timelines, require large capital expenditures and have a high environmental and biodiversity cost, which undermine the case for SAF being a robust and long-term solution to energy security concerns.

Using international rail for a greater proportion of passenger and freight movements reduces exposure to road and jet fuel price volatility. Transporting freight by air uses approximately nine times more fuel than road and 23 times more

fuel than rail.[42] Rail freight across the EU currently saves the equivalent of 144,000 barrels of oil per day compared with transporting the same goods by more oil-intensive modes, while passenger rail saves a further 220,000 barrels per day – amounting to approximately 133 million barrels of oil equivalent annually.[43] For context, these savings are equivalent to around 5% of the EU's total annual transport energy consumption.[44]

3. The climate imperative



International journeys account for an outsized proportion of carbon emissions from travel. The average number of flights per person in England (2.9 flights a year) is less than 0.4% of overall trips, but this is responsible for 55% of their annual transport emissions.[45] Yet 39% of people in the UK (aged 16 and over) did not take a single international flight last year.[46] Overall, fewer than 3% of UK residents accounted for 30% of all flights taken, and frequent flyers accounted for 63% of the growth in passenger traffic at UK airports over the preceding two decades.[47]

Despite the climate imperative, emissions from flying are forecast to grow. The Climate Change Committee predicts that aviation's proportion of UK greenhouse gas emissions will increase from 7% in 2022 to 11% in 2030 - posing a risk to the UK's emissions targets.[48]

International rail produces 96% lower emissions per journey than an equivalent flight.[49] As *Runways to Railways* demonstrated, if new direct international rail destinations are introduced with more competitive pricing, many short-haul flights will be easily substitutable by train, displacing high-emission flights at the scale demanded by the UK's climate obligations.

4. The policy opportunity



Great Britain's rail sector is undergoing a substantial process of reform. A new body, Great British Railways (GBR), will act as a single 'guiding mind' for the railways and the taking of passenger service operations under public control. A new Long-Term Rail Strategy will set out the strategic objectives for the railway over a 30-year period and inform the priorities of GBR and is expected to be published in autumn 2027. This presents a unique opportunity to consolidate the national and international rail agendas. *Runways to Railways* called on the Government to also develop an International Rail Strategy to support the long-term certainty required to encourage investment and innovation.

5. Passenger demand



The demand for international rail travel is growing, with the number of passengers travelling across the Channel Tunnel with Eurostar increasing by 7.3% compared to pre-pandemic. Campaign for Better Transport's 2025 report revealed a strong appetite for increased international rail travel, based on research among our supporters, especially if cost was more competitive and more direct destinations were available.[50] More recently, a poll by T&E UK and Clean Cities found that three times as many people (44%) prefer increasing international rail services by opening more stations over increasing air services by expanding airports (12%).[51] Support is particularly prevalent among young people, with two thirds (66%) of 18-24-year-olds stating international rail should be a priority. This aligns with growing public support for closer economic relations with the European Union.[52]

6. The airport capacity challenge



For some time, the Government has been considering allowing Heathrow Airport to build a third runway in order to expand capacity for more flights, claiming this will boost international trade and economic growth. However, the Climate Change Committee has warned that "there is no credible pathway for Heathrow Airport expansion within the UK's climate commitments under current policies" and, even without Heathrow expansion, aviation emissions are projected to increase by 2050.[53]

The economic benefit claims have also been discredited. The Department for Transport has revised its own projections of the national economic impact of a third runway down to just 0.03–0.05% of GDP by 2056, with impact focused on London and the South East, extracting 15,200 jobs from other regions.[54] In fact, research suggests that the recent growth in outbound flights focused on leisure, rather than business travel, means that expanding Heathrow would contribute to a 'tourism deficit' which contributes to the decline in many once-thriving domestic coastal tourist destinations.[55]

For several years, Campaign for Better Transport has been calling on the Government to support international rail expansion as a more cost-effective and sustainable alternative to aviation capacity growth.[56] International rail has successfully grown its share of journeys between London and the European destinations currently served. However, significant potential remains to switch journeys currently undertaken by air to an expanded rail offering. There are over 12.6 million passengers travelling between Heathrow and countries which are, or could soon be, adequately connected by rail. This potential almost doubles to 24.8 million, if other London airports are included (see Figure 4). Switching a proportion of these journeys to rail would free up some airport capacity, making the case for a third runway even weaker.

Figure 4: Number of passengers travelling to and from London airports in 2025[57]

Destination Country	Heathrow	Gatwick	Stansted	London City	Luton	Southend	Total
France	2,704,124	2,563,709	1,385,681	99,403	662,964	47,165	**7,463,046**
Germany	5,394,316	559,172	1,927,471	420,390	73,739	5,067	**8,380,155**
Belgium	570,834	301	629	0	505	0	**572,269**
Switzerland	2,498,541	1,180,780	90,457	383,962	432,275	13,240	**4,599,255**
Netherlands	1,469,288	537,782	517,162	697,673	491,214	73,265	**3,786,384**
Total	12,637,103	4,841,744	3,921,400	1,601,428	1,660,697	138,737	**24,801,109**

Further areas for action

This section explores the remaining barriers to growing international rail for passengers and freight, and identifies avenues for progress.

1. Capacity



Depots

Temple Mills International Depot in East London was purpose-built for Eurostar and is currently the only HS1 connected UK depot capable of accommodating rolling stock built against the European loading gauge.[58] This presents a substantial barrier for expansion of both Eurostar fleets and services, and of new market entrants. In 2025, the ORR determined that there was capacity for an additional operator to use the site.[59] Following a review of applications from several potential operators, the ORR granted Virgin Trains access. The relevant contracts were signed in September 2026, and this means that all the identified capacity at Temple Mills is now committed.

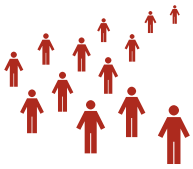
It is possible for new operators to utilise depot space on the European side of the Channel. For example, in early 2026, Trenitalia France signed a 35-year lease with infrastructure manager SNCF Network for a depot site at Maisons Alfort-Pompadour, from which it plans to operate services. However, additional UK depot capacity would be required for other operators. Adapting existing depot facilities to accommodate international fleets, or developing a new facility, is an extensive process, which could take up to a decade from planning to operation. But several suitable sites have already been identified as possible locations, including Ashford, Ripple Lane, Dollands Moor, and Fawkham Junction chord (also referred to as the Fawkham Link).[60]



Our recommendations:

Infrastructure managers should work with the Government to develop a comprehensive assessment of potential depot sites to enable further competition and fleet investment.

This depot capacity review should be accompanied by a coordinated review of infrastructure and coordination between infrastructure managers on how to unlock further capacity.



Capacity at London St Pancras

London St Pancras International already faces space constraints, which would be increased by additional operators serving the station. Expansion at the station is planned, with initial upgrades to the international area and connection to the main concourse, followed by further potential remodelling. This aims to increase capacity for the number of passengers per hour with a long-term ambition of 5,000 per hour compared to the current 2,000 per hour.[61]

Roundtable participants underscored the importance of a neutral station operator, independent of any train operating company, to provide fair, open access for new entrants. They also highlighted the challenge posed by the length of London St Pancras Highspeed's concession at the station and the challenge for investing in station upgrades before the concession ends in 2040.

Our recommendations:

The Government should support a more ambitious approach for expanding capacity at St Pancras. This includes exploring ways to ensure the concession structure can support and encourage investment in the station.

Station reopening

Eurostar withdrew services from Ebbsfleet and Ashford International Stations in Kent in March 2020, due to low demand during the pandemic, and it has not been commercially viable to reopen them since then. The termination of services to Kent stations has had a substantial economic impact on the region; with a 2024 survey of 500 Kent businesses finding that 89% had lost trade since the station closures.[62] Reopening them, as well as commencing services from Stratford International, would add resilience, regional connectivity, and additional capacity. It would also support local regeneration, which was at the heart of initial aims for HS1 and the situation of stations in the Kent area.[63]

Organisations including Bring Back Euro Trains have campaigned for services to return to Ebbsfleet and Ashford, highlighting the readiness of the Kent stations to support cross-channel routes and the benefits of restarting services for the local economy. T&E polling has found substantial public support for reopening both Ashford and Ebbsfleet and introducing international services at Stratford International.[64]

Commencing international services from Stratford International has also recently received backing from the Minister for Rail and the Mayor of London.[65] In October 2026, the Mayor unveiled a £20 million plan for enabling international trains to stop here, which was backed by a commitment in Budget 2026 to create a Business Rates Retention zone to unlock the funding.[66]

The main barriers to operating trains from additional stations are the operational complexity from post-Brexit border requirements and the added dwell time to any stop reducing the attractiveness of the service for through passengers. For this to be considered, there needs to be an agreement over financing responsibility for border control and security at the stations.

Ashford International (which cost £80 million to build with a further £10 million invested to upgrade the signalling and platforms to accommodate Eurostar trains), is widely regarded as the best candidate for initial station reopening due to its substantial 850 passengers per hour capacity – equivalent to Brussels and higher than Amsterdam. Estimated capital cost of reopening is between £2 and 3.5 million with annual Border Force staffing costs of £1.15-1.4 million.[67] In October, the Prime Minister indicated that the Government would explore options for reinstating services.[68] Stratford International presents another commercially attractive option, given its Elizabeth line connectivity, albeit with Stratford's lower capacity than originally planned of 250 passengers per hour.

The benefits of reopening each station are many:

Ebbsfleet

- ☑ Serves a large and growing population in north Kent and the Thames Gateway, a strategically significant regeneration corridor. Approximately 15,000 people live in Ebbsfleet and neighbouring new homes in Swanscombe and Northfleet.
- ☑ Direct access to the Dartford Crossing and M25, as well as substantial parking infrastructure (the station hosts a 6,000-space carpark) makes it well-positioned as a major interchange hub. Two and a half million people live within a 30-minute drive of Ebbsfleet, and ten million within a 60-minute drive.
- ☑ Infrastructure is already built and operational, minimising the capital investment needed to restore services.

Ashford

- Positioned close to the Channel Tunnel entrance, making it a natural stop for international services at minimal additional operational cost.
- Can accommodate 850 passengers in the international terminal (in contrast to 250 at Ebbsfleet) - almost half the passenger capacity of the current facilities at London St Pancras.
- Has substantial domestic rail connections with South East England to enable the station to serve as a gateway for inbound European tourists exploring rural and coastal Kent, including Canterbury, Margate, Hastings and Eastbourne.
- Core infrastructure is already built and operational, minimising the capital investment needed to restore services. In 2019, £8.5 million was invested in upgrading signalling at Ashford to enable Eurostar trains to stop at the platforms.
- Restoring connections would support economic growth and job creation for the area. Several global companies with major UK operations, including Coty Rimmel and Givaudan, have premises in Ashford.

Stratford

- Gemini Trains—which has announced its intention to run services from 2030—has stated its desire to use Stratford International.
- High transport connectivity, served by the Underground, DLR, Elizabeth line, Overground, and National Rail, offering access to a vast catchment across London and the wider region.
- Would relieve congestion at St Pancras and provide a more convenient departure and arrival point close to the east of London.
- Situated in a major regeneration zone, activation of international services could support significant economic and commercial investment in east London.
- High volume of existing through passengers. Stratford saw 128 million total passenger movements in 2019 – up from 40 million in 2006. It is predicted that this will increase by a further 60% by 2041.[69] Capacity for international travel depends on any interventions (such as the layout of future security) and assessments that would need to be undertaken by an operator/facility manager.
- Could deliver a boost to east London of between £2 billion to £3 billion over 60 years as the area becomes more attractive for offices and other services.[70]

Our recommendations:

Government should commission a cost benefit analysis to demonstrate the case for reopening Ebbsfleet and Ashford, as well as commencing services from Stratford. This would build on the working group London St Pancras Highspeed has convened (involving the Department for Transport and other stakeholders), to examine the barriers to reopening Ashford and Ebbsfleet International stations.

Infrastructure managers and the Government should release a sequenced opening plan for the prioritised stations with firm timelines. This should set a clear vision for capacity and routes serving these stations, aligned closely with GBR's vision for rail connectivity across the country. Kent stations should be prioritised, alongside progressing plans for Stratford.

In the Autumn 2026 Budget, the Treasury backed a

£20 million

plan by the Mayor of London to enable international trains to stop at Stratford



Rail freight

The challenge for growing international rail freight is not simply a lack of demand. Freight operators also face commercial barriers, a shortage of suitable terminals and restrictions on the rail network. One important problem is the size of the trains and loads that some British railway lines can accommodate. This is known as the loading gauge. Much of mainland Europe allows taller or wider freight wagons than parts of Britain's older rail network.

This matters on the routes between Dollands Moor, near the Channel Tunnel, and Wembley in London, which link the Tunnel to the wider British freight network, including the West Coast Main Line. Their restricted loading gauge means that many standard European freight wagons cannot use them. Operators must instead use specially designed wagons with lower floors to keep loads within the permitted height. These wagons can cost more to maintain, are in limited supply and can make less efficient use of train capacity.

Upgrading these routes to accommodate larger loads would make it easier to move containers and other freight between Europe and inland Britain without changing wagons or transferring goods. The estimated savings in operating costs for UK businesses are between £206 million and £763 million over 60 years.[71] More international rail freight could also benefit regions beyond London and the South East: 63% of the additional jobs estimated to arise from increased exports could be in the East Midlands, Yorkshire and the Humber, and the North West.[72]

Another obstacle is the shortage of freight consolidation centres. Rail works best when it carries large quantities of goods over long distances, but many businesses trading with Europe do not have enough goods to fill a train. Consolidation centres bring together smaller shipments from different businesses so that they can travel by rail as a larger load. More suitable centres would make rail a practical option for more importers and exporters.

There is a growing case for tackling these barriers. Road congestion, shortages of lorry drivers, rising haulage costs and the need to cut transport emissions all strengthen the case for shifting suitable freight from road to rail. Rail will not be cheaper for every journey, but modelling suggests it can offer lower costs for some shipments when the whole journey—including collection and final delivery—is taken into account.[73] Allowing larger European freight loads to use more of Britain's network would improve its competitiveness further.

Planned improvements at Barking Eurohub in east London show what investment could achieve. The terminal connects to High Speed 1 (HS1), which can accommodate larger European freight wagons, and provides access to road distribution networks and logistics businesses in the Essex Thameside area. Rail freight at the site is forecast to grow by at least 3% a year until 2033.[74] However, more work is needed to address limits on terminal capacity and the complicated movements required to rearrange trains and wagons.

Our recommendations:

The Government should work with infrastructure managers and the other sector stakeholders to develop a gauge enhancement scheme and the investment needed to deliver the necessary connectivity and drive growth in the international rail freight market.

Freight operators and the logistics sector should work together to create strategic solutions to combining shipments, and the Government should provide targeted financial support to help establish these solutions.

2. Passenger experience

Security and border controls

Security check and border control processes add significant amounts of time, reducing international rail's journey time advantage to flying, and depressing passenger numbers. They also require dedicated station staff and facilities, adding costs and capacity constraints for operators. Capacity is particularly an issue at St Pancras – a Grade I listed building with severe space and practical limitations, limiting the number of operators and destinations that can be served.

The security regime for Channel Tunnel services was designed in the 1990s, and mirrors airport standards. Post-9/11, aviation security was dramatically expanded. While there are security requirements directly linked to travel through the Channel Tunnel, security procedures have generally continued to track those of aviation. Unlike most domestic rail passengers, people travelling through the Channel Tunnel must undergo airport-style security screening before boarding. Making international rail more attractive will require a review of whether security requirements for international rail are still proportionate to the risks involved and compared to aviation.

Border controls for European Union travel and the resumed requirement for full passport checks post-Brexit are also a limiting factor. They were a central consideration in the decision for Eurostar to withdraw services from the Kent stations.[75] At St Pancras, the Entry/Exit System (EES), which came into effect in October 2025, and the infrastructure required to operate this system, created financial and logistical challenges.[76]

Resolving border regime requirements will be essential for accommodating increased passenger flows and for commencing services to new routes including Germany and Switzerland, which will struggle to operate under the current border procedures. Any change to the border control regime requires agreement from the UK-France Joint Security Committee under the Treaty of Canterbury.

Our recommendations:

Government should commission a formal risk assessment for Channel Tunnel rail security and deliver a proportionate security regime for Channel Tunnel services, rather than replicating airport style procedures.

Government should work with operators to determine fair financing arrangements for security and border controls at new stations and review the opportunities for new technology to provide a more automated and streamlined passenger experience.

Taskforces involved in MOU commitments with Germany and Switzerland should publish roadmaps with milestones and clear commitments on border controls and infrastructure.

Integration with domestic rail services

Delays and cancellations of domestic rail services and poor integration between operators can make it difficult for people living in other regions of the UK to choose rail for travelling internationally.

The creation of GBR will consolidate track and train, fares and ticketing, and timetabling, as well as lead to the development of the Long-Term Rail Strategy, which seeks to improve the railway's capacity to meet customers' needs. These changes present an opportunity to improve coordination between domestic routes and international services, making cross-Channel rail travel more accessible for people living across the UK.

Our recommendations:

The Government should set an international rail strategy as part of the Long-Term Rail Strategy, containing a clear vision for capacity and routes.

The Government should ensure that the Long-Term Rail Strategy includes a strategic plan to grow the proportion of cross-Channel freight and passenger travel. This should include a clear approach to connecting regions beyond London to HS1 interchange points.

Fares and ticketing

Travelling by rail internationally can be more expensive, particularly when compared to budget airline flights outside of the peak seasons. This can be a major barrier, especially for families and people booking at short notice. Trainline research found that 74% of British adults would be more likely to travel to Europe by rail if fares were lower.[77]

However, a fair comparison of city-to-city trips with flying needs to include the full cost of getting from one city to another, including airport transfers and baggage charges. Our 2023 report found that, on 57% of the routes, travelling by train was cheaper or there was no significant price difference with flying.[78] Taking a specific example, a Eurostar fare of £78 for London-Paris in November is higher than a comparable £26 flight from Luton; however, airport transfers at both ends and any extra baggage and seat charges would make flying more expensive.[79]

More competition between Channel Tunnel train operators could offer passengers a wider range of fares and departure times. For example, there has been a 40% fall in high-speed fares in Italy, and around 50% fall on key Spanish routes after new operators commenced services.[80]

UK passengers who want to continue across Europe beyond the destinations served directly can also find it difficult to plan and book train tickets, particularly when passengers need to change between different rail companies. If the whole journey cannot be booked in one go, passengers may have to find and buy separate tickets for each part of the trip. Research by T&E shows how widespread the problem is. It examined international rail journeys in Europe over 900 km, and more than half could not be booked in one transaction through major rail operators' booking platforms.[81] Independent ticket websites sometimes offer more options, but prices can vary considerably. Making it easier to find, compare prices and buy tickets for a complete journey would help rail compete with flying.

The European Commission proposed changes to rail ticketing and passenger rights in May 2026. The proposals aim to make it easier for booking websites and train companies to show and sell tickets from other operators.[82] This could help passengers book a journey involving several trains and companies in one transaction, rather than having to buy separate tickets along the way. Critically, this includes tickets departing from or entering the EU, as a single ticket. Therefore, in practice if Trenitalia, Virgin or Eurostar requested to buy onwards journeys from DB or SNCF, or independent ticketing retailers, they could then sell a whole ticket from London to Berlin. The proposals are not yet law, and the final rules may change during negotiations.

Passenger rights are just as important as booking. When a journey involves separate tickets from different rail companies, passengers may not be guaranteed help if a delayed train causes them to miss a connection. They could have to pay for a replacement ticket, food or overnight accommodation themselves. The proposed EU rule changes would improve protection for journeys involving more than one rail operator (including rights to help with onward travel, refunds and, where applicable, food and accommodation after disruption), but only if a 'single ticket' was bought in one transaction. T&E found that, currently, 40% of the rail alternatives to the 30 busiest cross-border flight routes do not have guaranteed passenger rights. It argues that passengers who book all parts of a journey through the same website should also be protected under the new regulations, even if the website processes them as separate purchases.[83]

T&E also warns that the proposals do not go far enough to make through-booking possible. Its analysis suggests that the proposed requirements on major booking platforms would make only two additional routes bookable as a single ticket among the 30 busiest cross-border air routes studied. Even after the changes, 43% of the equivalent rail journeys could remain difficult or impossible to book as a single ticket on major operators' websites.[84] Broader ticket-sharing requirements and stronger passenger rights would make international rail a simpler and more reliable choice.

The proposals still need to be negotiated and agreed by EU institutions. Their eventual start date and final scope are not yet settled.

Our recommendations:

UK Government and operators should work with European counterparts to develop affordable, combined ticket options that rival the cost and efficiency of flying, while streamlining the booking processes and accompanying passenger rights.

3. Pricing signals

Business rates

Recent substantial increases in business rates on international rail infrastructure are a significant issue for infrastructure managers and operators, and are a major deterrent against investment in growth projects.[85] Following the Valuation Office Agency's increase in the assessed value of the Channel Tunnel infrastructure used to calculate its rates bill, Eurotunnel has seen a rise in its rateable value from £40 million a year to £118 million a year.[86] A proportion of business rates are passed through to train operators, and for Eurostar, this rise will result in £30 million per year in pass-through costs.[87]

This rise has caused Eurotunnel to cancel several well-progressed expansion projects including investments in Barking freight terminal and instigating a direct freight service to and from Lille.

Roundtable participants expressed concern that such unpredictable changes in financial levies on businesses driving green growth – such as the rail sector – prevent investment and are inconsistent with the government's Modern Industrial Strategy which positions 'Creating a pro-business environment' as a key aim.[88]

Our recommendations:

The Government should examine the impact of business rates on Channel Tunnel infrastructure, and act to prevent rapid and substantial rises in business rates for companies investing in international rail and modal shift alternatives. It should consider what concessions might be possible for businesses supporting modal shift – as it has done for hospitality.

The aviation-rail tax imbalance

Fulfilling international rail's potential to substitute short-haul flights to mainland Europe requires addressing the current taxation regime, which makes the relative cost of air travel more favourable compared to rail. Indeed, the number of low-cost airlines running flights between London and Paris has risen, from occupying just 12% of the market in 2010, to 41% in 2019.[89] This suggests that low-cost services are sustaining the demand for this air travel on this route.

In the UK, airlines are not liable to pay any duty on aviation fuel, even though the post-Brexit UK-EU Air Service Agreement permitted the UK to tax fuel used on routes to EEA destinations.[90] Furthermore, Air Passenger Duty (at £15 for most passengers travelling 0 to 2,000 miles) has risen by just £5

since 1997 and has not kept pace with inflation. Meanwhile, the Government halved duty on domestic flights in 2023.[91] This runs directly counter to UK climate objectives, and is impeding a modal shift from short-haul aviation to rail on routes where trains are already faster or comparable.

In 2019, aviation was responsible for approximately 39 million tonnes of the UK's greenhouse gas emissions, compared with around two million tonnes from rail. This means aviation had an effective carbon price of minus £26 per tonne of emissions, compared with over £350 for rail.[92] Introducing a kerosene tax, a frequent flyer levy and higher rates of Air Passenger Duty for private jets would address this imbalance and raise revenue to invest in international rail.

Our recommendations:

The Government should implement a tax on aviation fuel, a frequent flyer levy and a 'super' Air Passenger Duty rate for all private jet passengers. This should form part of a wider examination of the UK's current approach to taxing sustainable transport infrastructure and its alignment with the Government's growth and green transport objectives.

Conclusion

The international rail landscape has changed considerably since our report *Runways to Railways* was published, and the direction of travel is encouraging.

New operators, new rolling stock investment, prospective routes to Germany and Switzerland, and renewed investment in freight demonstrate that the market is capable of significant growth. At the same time, the economic, environmental and energy-security case for shifting appropriate journeys from air to rail has become even more compelling. International rail can strengthen regional economies, support resilient freight connections and provide a substantially lower-carbon alternative to aviation.

However, the opportunity is not yet being matched by the policy and infrastructure framework required to realise it. The UK's international rail offer remains constrained by limited depot and station capacity, border and security arrangements, fragmented ticketing, an unfavourable aviation-rail tax imbalance and the absence of a clear overarching international rail strategy. These barriers risk limiting the benefits of new market entrants and investment before they can deliver the scale of modal shift that the UK needs.

The priority now must therefore be to convert momentum into delivery. Government should establish a clear strategic framework for international passenger and freight rail, integrate it into the Long-Term Rail Strategy, provide certainty for investment, enable new operators and routes, and work with European partners to remove operational and border barriers. It should also ensure that taxation and financial policy do not continue to favour aviation over lower-carbon rail.

The Channel Tunnel is a major piece of existing infrastructure with considerable untapped capacity; unlocking it would allow the UK to make better use of an asset already in place while supporting economic growth and progress towards its environmental objectives.

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