

The Report

Open Access Rail

Connectivity, community, cost

Stuart Jones Embedding open access in the heart of national rail strategy

Symposium The case for increased competition across UK railways

Kim McGuinness Rail reform as an engine for economic growth

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 **HullTrains**

Despite its relatively small share of the network, open access has a big impact on UK railways



A track record of success

Regional investment

Open access operators Lumo and Hull Trains are generating a combined £1.4bn in economic benefits across existing routes.



£1.4bn

Cutting carbon

Between London and Edinburgh, the proportion of journeys made by rail rather than air has grown significantly since 2019. London-Glasgow, with no open access services, has seen a 4 per cent rise in rail vs air in the same period.



+44%

Newer, cleaner trains

Open access accounts for over a quarter of all new rolling stock investment over the last five years, despite having a footprint that covers less than 1 per cent of the railway.



28%

+6m



Populating the network

The Edinburgh to London line has seen six million additional journeys made by rail since the commencement of Lumo services less than five years ago.

94%



Raising standards

Lumo's arrival forced LNER to up its game, with customer satisfaction jumping 7 per cent from its pre-2021 level of 87 per cent.

+35%



Improving infrastructure

From October 2025, Lumo will pay over a third more per train mile on some lines than franchise operators. It is contributing more than its share to fixed network costs.



Stuart Jones
Managing director,
First Rail Open Access

“Communities are clear that they strongly value the benefits that open access can bring”

Open access rail may once have been seen as a niche part of the UK network, but today it has proved itself as a vital engine of choice, competition and growth. Open access is not just a viable part of the rail mix in the UK – it is essential if we want rail to serve more people, more sustainably, and at better value.

We have already demonstrated what the model can achieve. Hull Trains showed as

long as 25 years ago that open access can restore links that franchised services had left behind, reconnecting communities and growing the overall market. More recently, Lumo has shown how a new entrant, with no subsidy and no legacy obligations, can attract record numbers of passengers and take meaningful market share from domestic aviation, all at lower cost to the customer and the taxpayer.

Open access brings fresh thinking into rail. It encourages all operators to innovate, whether in pricing, digital technology, customer experience or sustainability. It helps us test new ideas quickly and learn what works. Most importantly, it grows the market, attracting people who otherwise would have driven or flown. That is exactly the kind of behaviour change we need if rail is to meet its full potential in decarbonisation and economic growth.

First Rail Open Access is pushing forward with new proposals, enhancing existing services, launching new ones such as our planned Euston-Stirling connection, and looking at ways to serve more towns and cities that want and deserve direct connectivity. The demand is there. Communities have made clear how strongly they value the benefits that open access could bring. The challenge is ensuring the regulatory and policy framework gives these ideas a fair chance.

As Great British Railways takes shape, government has an opportunity to fully embrace open access as part of the future railway. That means a level playing field on access to capacity, transparent decision-making, and recognition that new operators strengthen rather than threaten the system. Open access is not about taking customers from others – it is about expanding the pie, bringing investment into the sector through new services and train orders, and giving people another reason to choose rail.

And we can't afford to underestimate the wider benefits. Every new service we launch creates jobs, stimulates local supply chains, and helps drive tourism and business travel. Every affordable ticket sold helps more people see rail as a realistic option. Every train that replaces a car or a plane journey brings us closer to net zero.

The task ahead requires perseverance, but the direction of travel is clear. Open access has proved a valuable and important part of the rail mix. Now we must build on that success and embed it into national rail strategy, so that innovation, affordability and sustainability are not optional extras but core to how we move the country forward. ●

A call for greater connections

We asked five champions of open access rail: What is the strongest case for more competition on the UK's railways?



The Passenger Railway Services (Public Ownership) Act 2024 marked a turning point for Britain's railways. Since receiving Royal Assent last November, services have begun the process of transferring into public ownership.

The government has said that all franchised passenger services will move into public hands by the end of 2027, as existing contracts expire.

Within this reshaped landscape, the future of open access rail has come under closer scrutiny. These are the operators that run services commercially, without subsidy. Ministers have stated that even in a system returning to public control, open access retains a role, so long as it “adds value and capacity to the network”.

That principle has already been tested. Over the past year the Office of Rail and Road (ORR) has approved extensions to existing rights, allowing operators to add stops, run more frequent services and secure track access agreements stretching well into the 2030s.

These decisions suggest confidence that open access can broaden the market and attract new passengers. Other applications, however, have been refused. The regulator has cited congestion, risks to punctuality, and the potential



impact on publicly contracted operators. The balance between competition and protecting public services is under active debate.

Policy guidance is evolving too. In January, the Transport Secretary set out how open access should fit within a largely nationalised system.

While the ORR's statutory duties remain, the expectations are clear: applications must demonstrate benefits by opening new markets or adding capacity, without putting extra pressure on already busy parts of the network. Revenue "abstraction" – the risk of diverting income away from public operators – will be scrutinised closely.

The ORR has updated its own guidance as well, refining how costs and benefits are assessed and revising the "not primarily abstractive" test, which asks whether a service generates more new revenue than it takes from others. These changes create a more demanding environment for new entrants.

In this symposium, five advocates of competition set out their arguments for open access, ranging from lowering fares and supporting regional economies to improving reliability and sustainability.



Jo White MP
Member of Parliament
for Bassetlaw

In my constituency, we know better than most that rail connectivity is not just about timetables and trains – it is about opportunity, community and the future of our local economy.

Open access has shown us what is possible when new services are introduced with ambition and purpose. Without Hull Trains, for example, Hull would be left with just one nationalised service a day to London. It has been a lifeline to my area as well – giving businesses, families, and visitors the ability to thrive, and ensuring left behind areas are connected once more.

Direct rail services mean so much more than quicker journeys. They are catalysts for growth. In Bassetlaw, where over 10,000 new jobs and new homes are already being built, a direct service to London would be transformative, allowing people to stay in the place they call home and be able to access opportunities across the country.

Too often, people feel they must leave in search of prospects. Open access shows that the opposite can be true: opportunity can and should come to us. By investing in direct, affordable and sustainable connections, we can create thriving local economies, attract new residents, and keep our towns and communities strong. That is why I believe open access must be part of the conversation about economic growth and investing in the future of places like ours.



Darren Price
Leader, Carmarthenshire
County Council

A planned Paddington to Carmarthen service will benefit people across west Wales.

This open access service – scheduled to introduce five daily return services from December 2027 – will provide direct, affordable and fast links between Carmarthen and London, calling at key interchanges including Newport and Cardiff, and intermediate stations such as Gowerton and Llanelli.

Competition has a proven capacity to drive down fares and expand choice. And a low-cost approach will introduce price pressure and service options that legacy operators have struggled to deliver alone.

For Carmarthenshire this means more accessible labour markets, stronger business-to-London links and a boost to its visitor economy. There is potential to provide concrete contributions to local productivity and jobs.

Transport is the backbone of economic and social opportunity, and this service dovetails with Wales's National Transport Delivery Plan ambitions to improve connectivity, cut car dependence and support decarbonisation through modal shift.

Beyond immediate travel benefits, open access services can act as catalysts for wider social and economic benefits, opening new opportunities for residents in Carmarthenshire and across Wales.



John Thomas
Policy director, ALLRAIL

Open access competition on the East Coast Main Line has delivered lower fares, more choice, and some of the highest levels of customer satisfaction in the rail sector. Crucially, it has reconnected underserved communities – such as Hull, Bradford and Sunderland and many intermediate stations that would otherwise remain relatively neglected – with direct services to London.

It has shifted significant traffic away from aviation on the London–Edinburgh corridor, bringing both environmental benefits, creating new jobs and attracting large-scale private investment. All of this at no cost or risk to the taxpayer.

Open access has grown the overall market and delivered new revenue streams that would not otherwise exist, while open access operators reinvest the majority of their income into the services that they provide – rather than into shareholder pockets.

Soon, long-overdue competition will arrive on the West Coast and Great Western routes. Passengers can expect more trains to more destinations, a better service, and more affordable fares.

The evidence is clear: open access operators bring in private capital, increase train frequency, raise standards and keep prices down. This is the model that works. This is a model that should be championed by the government and an integral component in the future of Great British Railways.



Dr Liz Cameron
Chief executive, Scottish Chambers of Commerce

Having long championed an inclusive, future-focused transport network, the advent of open access rail is accelerating Scotland’s journey.

Operators are not only broadening choice for passengers but are also driving economic growth – delivering benefits for our businesses, people and communities, forging stronger links between Scotland and key economic hubs across England.

That connectivity underpins growth across Scottish enterprise – helping businesses access new markets, enabling our hospitality and tourism sectors to welcome more visitors, and placing our food and drink, cultural and creative industries firmly on the national and international stage. With affordable fares, open access democratises travel, unlocking opportunities for more people to live and work in Scotland while building careers across the UK.

Over £500m of private investment in new electric Hitachi trains is securing high-value jobs across the UK supply chain, while cutting emissions by up to 95 per cent. It is a model of economic growth aligned with our net zero ambitions.

With new open access routes planned to Glasgow and Stirling, we’re poised to ensure more of our towns and cities are directly linked to opportunity. Scotland wants more: more investment, more connections, more growth. Open access is helping us deliver it.



Peter Darrant
Chair, Out North East

It comes down to three things: price, reliability, and community. Right now, you can fly to Europe from the north-east for less than it costs to get to London. That tells you something is wrong. Open access operators have shown that they can challenge the status quo by putting on affordable services without cutting quality. When tickets are priced fairly, people use rail more often – and that’s better for the economy, for the environment, and for passengers.

Reliability is just as important. I don’t need to get to London half an hour quicker but I do need to know the train I’ve booked will get me there on time, in comfort, and at a price I can afford. When rail works properly, it’s one of the best ways to travel. It’s when services fail that people lose faith. The idea of bringing it all under government control terrifies me. We can’t seem to build anything on time or to budget. More competition means everybody ups their game.

And then there’s community. In our region, open access operators want to be part of the region, not just run trains through it. They’ve supported Pride, worked with grassroots groups, backed local food suppliers and artists, and given charities like mine a seat at the table. That isn’t just sponsorship – it’s partnership, something they have far more incentive to build than the established big players. This creates local champions for rail, and makes services feel rooted in the places they serve.

Comment



Kim McGuinness
Mayor of the North East

“Open access is about more than services and fares. It’s also helping to retain high-value jobs”

I was elected to make our region the home of real opportunity, a place where everyone can truly thrive. Our interim Local Growth Plan sets out a bold ten-year vision to create good jobs, tackle child poverty and raise living standards in every community.

Achieving this depends on a transport system that works well for residents. This is why I welcome the government’s commitment to rail reform. Putting Great British Railways

(GBR) at the heart of the national network and giving mayors the tools to ensure local priorities are reflected through rail partnerships are steps in the right direction. Combining national coordination with local accountability is a credible way forward from the failed rail model which has been in place for decades.

As we build the new rail industry, we need to be careful not to lose the value and innovation that open-access operators bring. The government has said they should have a continued role. That commitment must be matched by the protections needed to help these vital services thrive.

In many instances, people I speak to have been priced off the rail network entirely. That needs to change to allow everyone more access to opportunities. We need more competitive pricing across the board, and operators are leading the way. Lumo’s fares from Newcastle to London offer a quality service at a price that makes travel by rail much more affordable.

Sunderland is another powerful example. For a city of its importance to our regional economy, it has been shockingly underserved by national rail. Grand Central provides the only rail services from Wearside to London, vital for supporting the ambitious programme we are undertaking with Sunderland City Council. The recent decision to extend access rights until 2038 – backed by a new fleet of bi-mode trains – is exactly the sort of long-term commitment the city, and our region, needs.

Open access is about more than services and fares; it’s also helping retain high-value jobs in the region. When FirstGroup invested in a new fleet of Hitachi trains, that meant more orders for the Hitachi factory in Newton Aycliffe and its hundreds of skilled workers. I’ve met the workforce and know the site well, and I have seen the pride, expertise, and opportunity that this investment supports. It’s creating apprenticeships, strengthening the supply chain, and keeping world-class manufacturing alive and thriving right here in the north east.

This is what successful railways do: connect our communities, support local industry and give people real choices. The government has made the right commitments. Let’s protect rail services that matter, whoever provides them, encouraging pricing that works better for people and our communities, and ensuring that open access continues to play a vital role in the north east’s transport and our exciting economic future. ●

taking you further



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Glasgow Dec 2025
Stirling Spring 2026