

Transport Strategy Summary 2025





Photo: Emma Varley

Introduction

This is the Transport Strategy for South East England, prepared by Transport for the South East (TfSE), the region's Sub-national Transport Body.

The South East of England is Britain's gateway to the world. Its dynamic economy, scenic landscapes, rich cultural heritage, and proximity to London and mainland Europe make it one of the most prosperous and desirable regions for living, working, and visiting in Britain.

This strategy outlines a vision for the South East to be recognised globally for achieving sustainable prosperity and the highest quality of life. It builds on the previous strategy that was published in 2020 and is underpinned by over seven years' extensive technical work.

Its mission-driven approach sets a route map for achieving this vision through improving strategic connectivity, strengthening resilience, enhancing integration, decarbonising the transport system, and unlocking sustainable growth.

This strategy focuses on areas needing urgent action, where TfSE is uniquely positioned to drive change. Recognising financial constraints, TfSE's approach emphasises practical, achievable solutions, aiming to maximise the impact of available resources.

Developed through **rigorous evidence gathering and stakeholder engagement**, this strategy presents a framework for action to meet the region's most pressing transport challenges.

In addition to the strategy, an **Integrated Sustainability Appraisal** has been conducted to assess the strategy's impact on sustainability objectives, including biodiversity, habitats, carbon, health, access, and equity.

Our Role

Established in 2017, TfSE's mission is to grow the South East's economy by delivering a safe, sustainable, and integrated transport system.

TfSE brings together 16 local transport authorities, as well as representatives from district and borough councils, national agencies, and protected landscapes, harnessing a wide range of local and regional expertise.

TfSE and its partners aim to boost productivity and competitiveness, enhance the quality of life for residents, and protect the region's natural and built environment.

TfSE aspires to transform the quality of door-to-door journeys for residents, businesses, and visitors across the South East. As a strategic body, TfSE plays a crucial role in adding value by ensuring that funding and strategic decisions about transport in the South East are informed by local knowledge and priorities.

Its comprehensive governance structure, combining political leadership, technical expertise, and stakeholder engagement, ensures that **TfSE is well-placed to deliver for the region.** This structure enables it to speak with one voice on behalf of the region, making a compelling case for investment.

TfSE members and partners



Our Region



7.8m
Residents
(2022)



3.8m
Jobs (2022)



£230bn
GVA per annum



2 National
Parks

7 National
Landscapes

Key to map

1. Reading
2. Wokingham
3. Windsor and Maidenhead
4. Bracknell Forest
5. Southampton
6. Portsmouth

- Key port
- International rail stations
- Key airport



18%

UK freight tonnage served
by South East ports,
excluding London (2023)

13m
Ferry passengers
(2023)

18m
Channel tunnel
passengers (2023)

Mode share of trips



70% Car
21% Foot or cycle
5% Bus or taxi
4% Rail



381
Rail stations



327
Miles of
motorway



40m
Gatwick Airport
passengers (2023)

Case for Action

Since TfSE published its first Transport Strategy in 2020, the context has evolved significantly.

National and local policy changes, intensified decarbonisation efforts, post-Brexit trade dynamics, and shifts in travel behaviour due to the pandemic all present new challenges.

Additionally, **TfSE's expanded evidence base has provided critical insights into the region's transport needs**, informing this strategy's updated priorities.

This research has identified several key challenges that need to be tackled if the region is to succeed.

Productivity



UK productivity has flatlined – Productivity per hour worked grew just 5% between 2010-20 – half the rate seen in Germany and the USA.

Decarbonisation



Transport accounts for 40% of carbon emissions in the South East (2022) – by far the largest contributor across all industries.

Housing affordability



The **house price to earnings ratio is over 10:1** in the South East – higher than any other region outside London.

East-West connectivity



The average speed of passenger rail services on most East-West corridors is under **40mph** – compared to **60mph** on most London corridors.

International trade



Trade volumes through Dover are down around 20% since the UK left the EU, and **Eurostar no longer serves** Ebbsfleet and Ashford.

Climate resilience



There were more than **4 times** as many delays to rail services in the South due to extreme heat in 2018 than in the 2000s.

Equitable prosperity



The **Gross Value Added (GVA) per capita** of less well-connected areas is **less than half** that of well-connected areas and many residents are at risk of **Transport Related Social Exclusion (TRSE)**.

Congestion



The M25 carries over 220,000 vehicles a day – making it the busiest and one of the most congested roads in Europe.

Vision and Goals

Our vision is for the South East to offer the highest quality of life for all and be a global leader in achieving sustainable, net zero carbon growth.

To achieve this, we will develop a resilient, reliable, and inclusive transport network that enables seamless journeys and empowers residents, businesses, and visitors to make sustainable choices.

We will deliver this vision by driving strategic investment and forging partnerships that deliver sustainable transport, integrated services, digital connectivity, clean energy, and environmental enhancement.

Our vision is supported by three goals that reflect the three pillars of sustainable development.

Economic Goal

Improve productivity and attract investment to grow our economy in a way that is sustainable, inclusive and resilient.

Social Goal

Improve health, safety, wellbeing, quality of life, and access to opportunities for everyone.

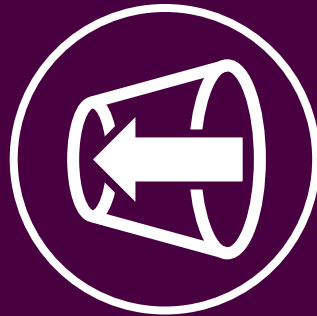
Environmental Goal

Protect and enhance the South East's unique natural and historic environment, while supporting a just transition to net zero.

Our strategy is built on **six principles** that guide us toward our vision and goals. These principles have been applied across many aspects of this strategy and help us stay focused on delivering the best possible outcomes for the South East. These principles are outlined on the following page.

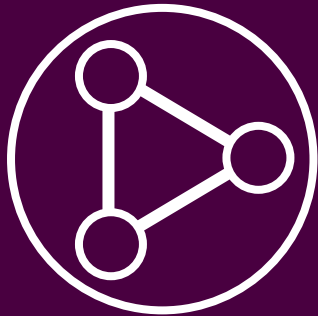
Vision and Validate

Instead of planning based on current travel trends, this approach envisions a desired future and creates the transport system to achieve it, focusing on long-term sustainability and resilience.



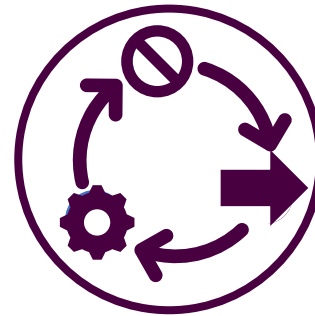
User Hierarchy

By prioritising pedestrians, cyclists, and public transport over cars, this principle promotes safer, more sustainable urban environments by designing infrastructure to reflect these priorities.



Triple Access Planning

This principle expands accessibility by considering not only physical transport but also digital and social factors, ensuring a more inclusive and connected transport system.



Avoid – Shift – Improve

A strategy to reduce transport carbon emissions by avoiding unnecessary travel, shifting to lower-carbon transport modes, and improving the efficiency of remaining high-carbon modes.

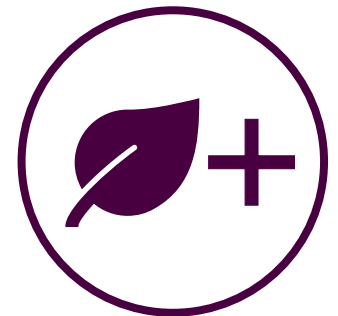
Movement and Place

Roads and streets are designed not only for efficient transport but also to enhance the surrounding areas, balancing the needs of movement with creating vibrant, liveable spaces.



Environmental Net Gain

New transport developments should leave the environment better off than before by enhancing biodiversity, using sustainable design, and integrating green solutions into infrastructure projects.



Missions

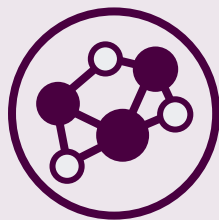
TfSE has prioritised five missions to drive progress toward its vision. Each mission serves as a clear call to action, emphasising tangible outcomes, setting direction, and aligning with national and local priorities.

The missions have been carefully chosen to address key areas where the South East risks lagging behind without decisive action, focusing on issues where TfSE can play a strategic, impactful role.

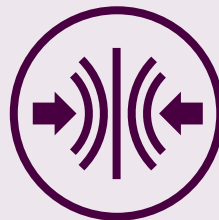
Each mission follows a structured route map that clarifies the path forward, including a mission statement, desired outcomes, and priorities for the short and longer term.

This approach ensures that **each mission is robust and adaptable** to different scenarios, enabling TfSE and its partners to respond effectively to emerging needs while driving meaningful progress across the region's most pressing transport challenges.

The five missions are:



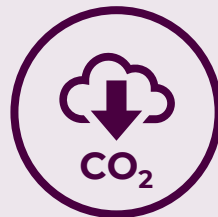
**Strategic
Connectivity**



Resilience



**Inclusion and
Integration**



Decarbonisation



**Sustainable
Growth**

Strategic Connectivity Mission



We will boost connectivity in the South East by enhancing strategic regional corridors to ensure all communities and businesses have access to high-quality, convenient and resilient transport links and key services, for people and goods.

We will have succeeded when:

- ▶ The connectivity of all the South East's strategic corridors – in terms of journey times and reliability – is comparable to those corridors that serve London.
- ▶ Our key towns, cities, and international gateways are as accessible by public transport as they are by car, and rail freight is as competitive as long-distance road freight.

Short Term Priorities

The immediate focus is on improving the existing network to better serve both passengers and freight by:

- ▶ Enhancing incentives for long-distance public transport by optimising fares, ticketing, and on-board amenities.
- ▶ Refining timetables to support fast-growing markets like leisure travel and rescheduling maintenance to reduce disruption.
- ▶ Reinstating international rail services from Ebbsfleet and/or Ashford to relieve capacity at St Pancras.
- ▶ Providing adequate rail capacity and connectivity to support growth at Gatwick and Southampton airports.
- ▶ Safeguarding critical areas and aligning planning policies to enable future improvements.

Long Term Priorities

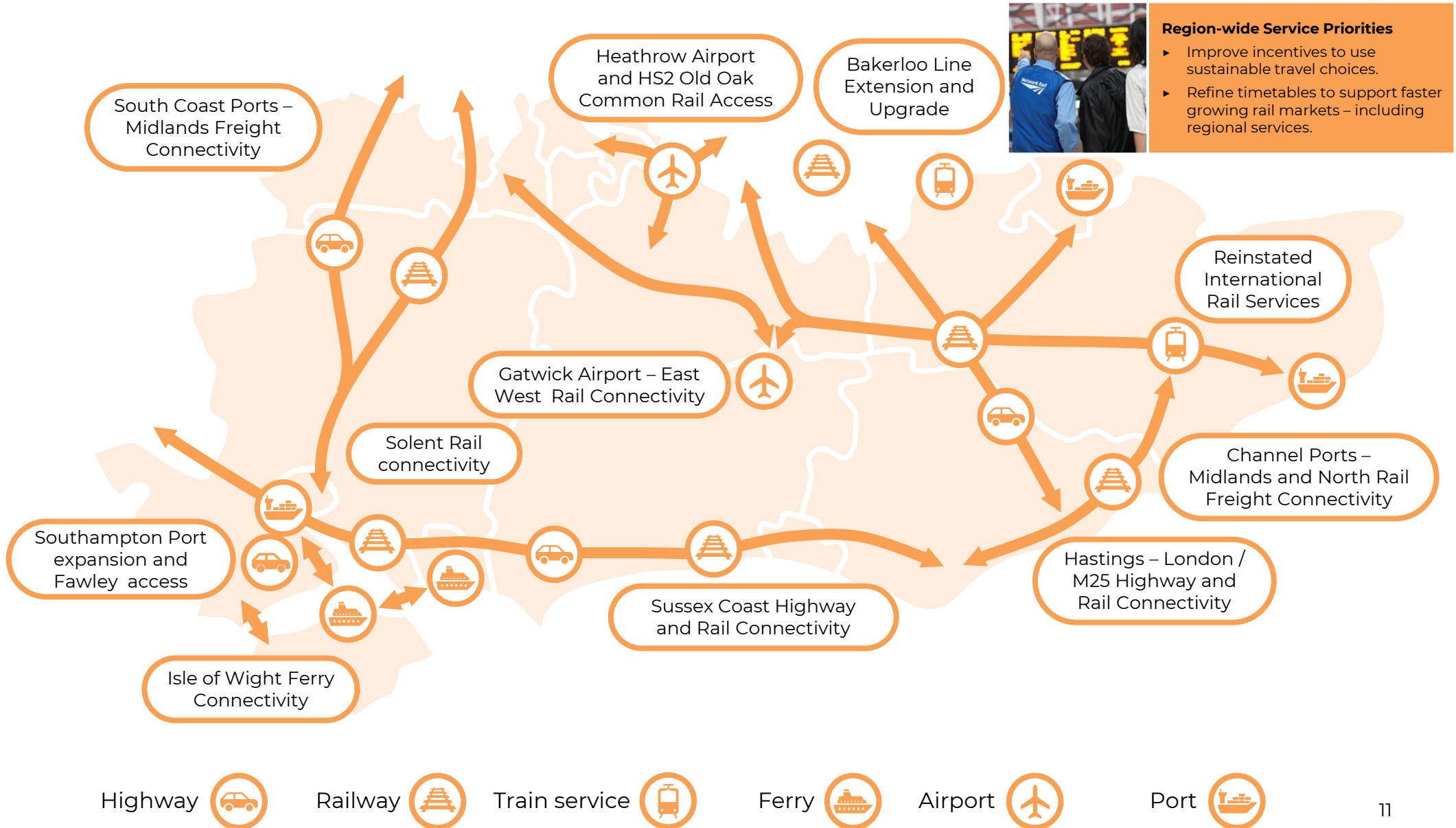
In the longer term, efforts will focus on major upgrades and expansions to address bottlenecks and improve connectivity by:

- ▶ Upgrading the South coast's highway and rail corridors between Brighton and Southampton to strengthen economic ties between the region's two largest built-up areas.
- ▶ Reducing journey times between London and the region's "left-behind" coastal communities
- ▶ Enhancing ferry access to islands, including the Isle of Wight.
- ▶ Strengthening freight corridors from Southampton and Channel Ports to the Midlands and North.
- ▶ Developing new rail connections to international gateways, including links to Heathrow and Gatwick.
- ▶ Reviewing regional rail connectivity to leverage opportunities presented by the opening of Old Oak Common and creation of HS2.



Photo: Network Rail

Strategic Connectivity Priorities





We will safeguard the South East's connectivity and work to maintain and enhance the reliability and resilience of our transport systems for future generations. We will do this by anticipating risks, taking preventative measures, enhancing recovery and adapting in the face of uncertain future risks.

We will have succeeded when:

- ▶ The transport network delivers comfortable, reliable journeys between key towns, cities, and international gateways.
- ▶ The transport network has the capacity and agility to manage, absorb, and recover from major disruptions quickly, including disruption arising from associated power and digital networks.
- ▶ The risk of major failures occurring on the transport network is reduced.

Short Term Priorities

Immediate efforts will strengthen the current network's resilience against both planned and unplanned disruptions by:

- ▶ Evaluating the economic impact of road disruptions and seeking sustainable funding to enhance road maintenance.
- ▶ Establishing a long-term funding pipeline for infrastructure renewals.
- ▶ Strategically planning for future risks – including climate, land use, and technology – to ensure the network can anticipate and adapt to potential threats.
- ▶ Advocating for consistent funding for critical maintenance and preventative projects.
- ▶ Coordinating with utility providers on roadworks planning to complete essential maintenance with minimal disruption.

Long Term Priorities

In the longer term, efforts will focus on major upgrades and expansions to address bottlenecks and improve connectivity by:

- ▶ Reducing bottlenecks in key areas like Croydon and Woking to improve service reliability on major rail corridors.
- ▶ Developing secondary corridors, such as the Uckfield – Lewes line, to offer alternative routes and ensure continuous connectivity.
- ▶ Implementing the Kent Bifurcation Strategy – including improving Operation Brock and Operation Stack to relieve pressure on existing Thames crossings and strengthen strategic connectivity and resilience between Channel ports and the M25.
- ▶ Addressing pinch points on highways to improve flow for all users, including buses, and making key infrastructure more resilient to future risks.

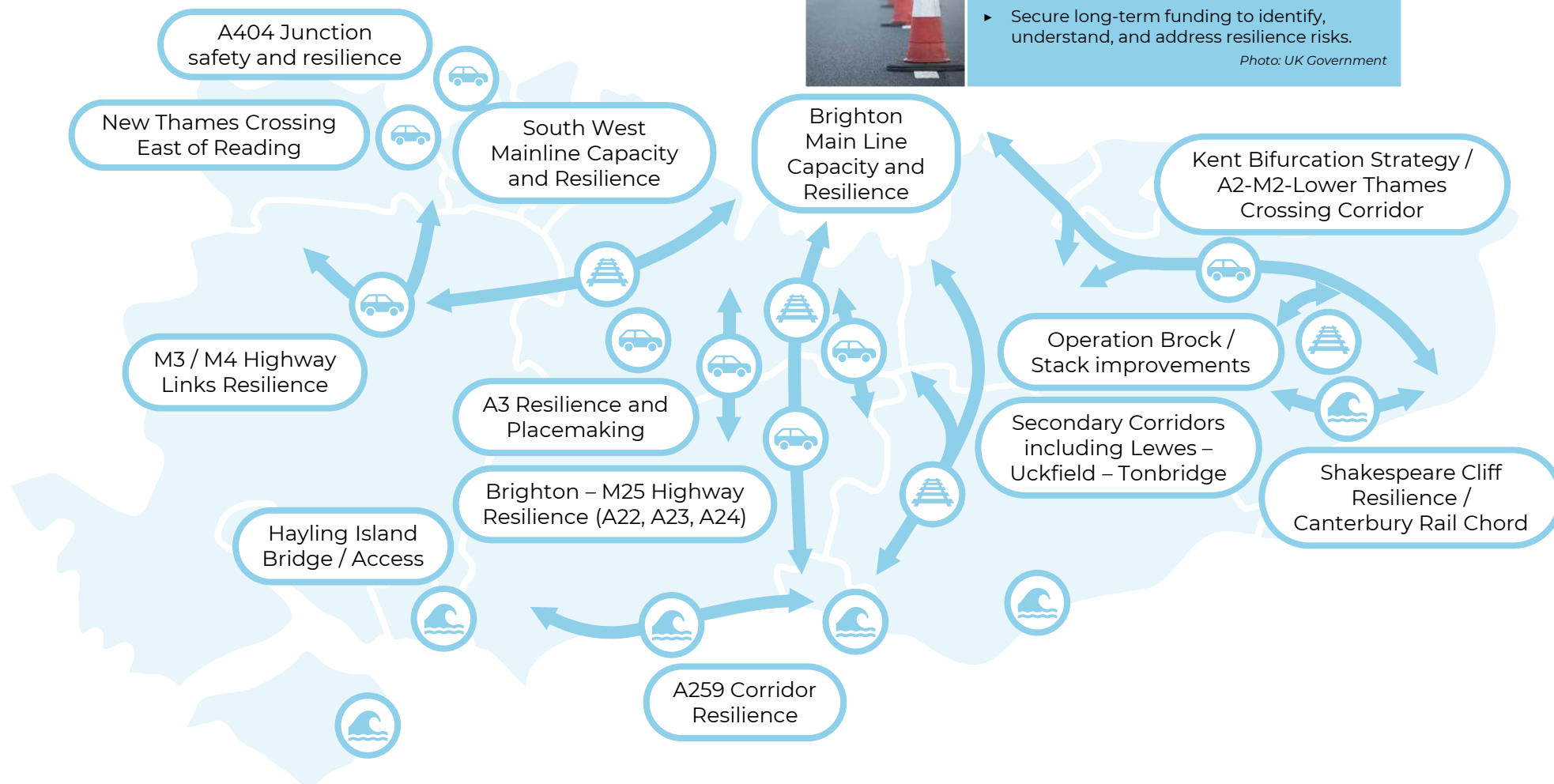
Resilience Priorities



Region-wide Maintenance Priorities

- ▶ Reduce the maintenance backlog and improve roadworks management.
- ▶ Secure long-term funding to identify, understand, and address resilience risks.

Photo: UK Government



Highway



Railway



Coastal erosion/flooding risk

Inclusion and Integration Mission



We will create an inclusive and integrated transport network in the South East that enables affordable, safe, seamless, door-to-door connectivity for all users – including those currently underserved by the transport system.

We will have succeeded when:

- ▶ Everyone can affordably travel where they need to go when they need to go.
- ▶ Customer satisfaction with all aspects of the transport network is high across every section of society.

Infrastructure Priorities

Delivering these outcomes will require targeted infrastructure upgrades, with priorities including:

- ▶ Designing infrastructure using inclusive design principles that cater to socially excluded groups, enhancing accessibility for those with disabilities and limited mobility through improved lighting, wayfinding, and public spaces.
- ▶ Improving connectivity in areas at risk of social exclusion, focusing on North and East Kent and coastal East Sussex to ensure that residents have reliable access to key services.
- ▶ Upgrading interchanges and step-free access at transport hubs, facilitating smooth connections and enhancing passenger comfort with better signage, seating, and safe, comfortable waiting environments.

Fares, Ticketing, and Service Priorities

Interventions to improve affordability and accessibility include by:

- ▶ Delivering affordable fares and concessions for low-income residents, students, the elderly, and other vulnerable groups.
- ▶ Improving fares and ticketing by simplifying journeys and lowering costs with a unified ticketing structure across modal and institutional boundaries.
- ▶ Delivering socially necessary transport services (potentially demand responsive) to connect isolated communities with essential services.
- ▶ Delivering Bus Service Improvement Plans (BSIPs) and exploring models like franchising to meet community needs.
- ▶ Enhancing connectivity to islands and peninsulas, particularly the Solent and Medway areas.



Inclusion & Integration Priorities



Region-wide Fares/Ticketing Priorities

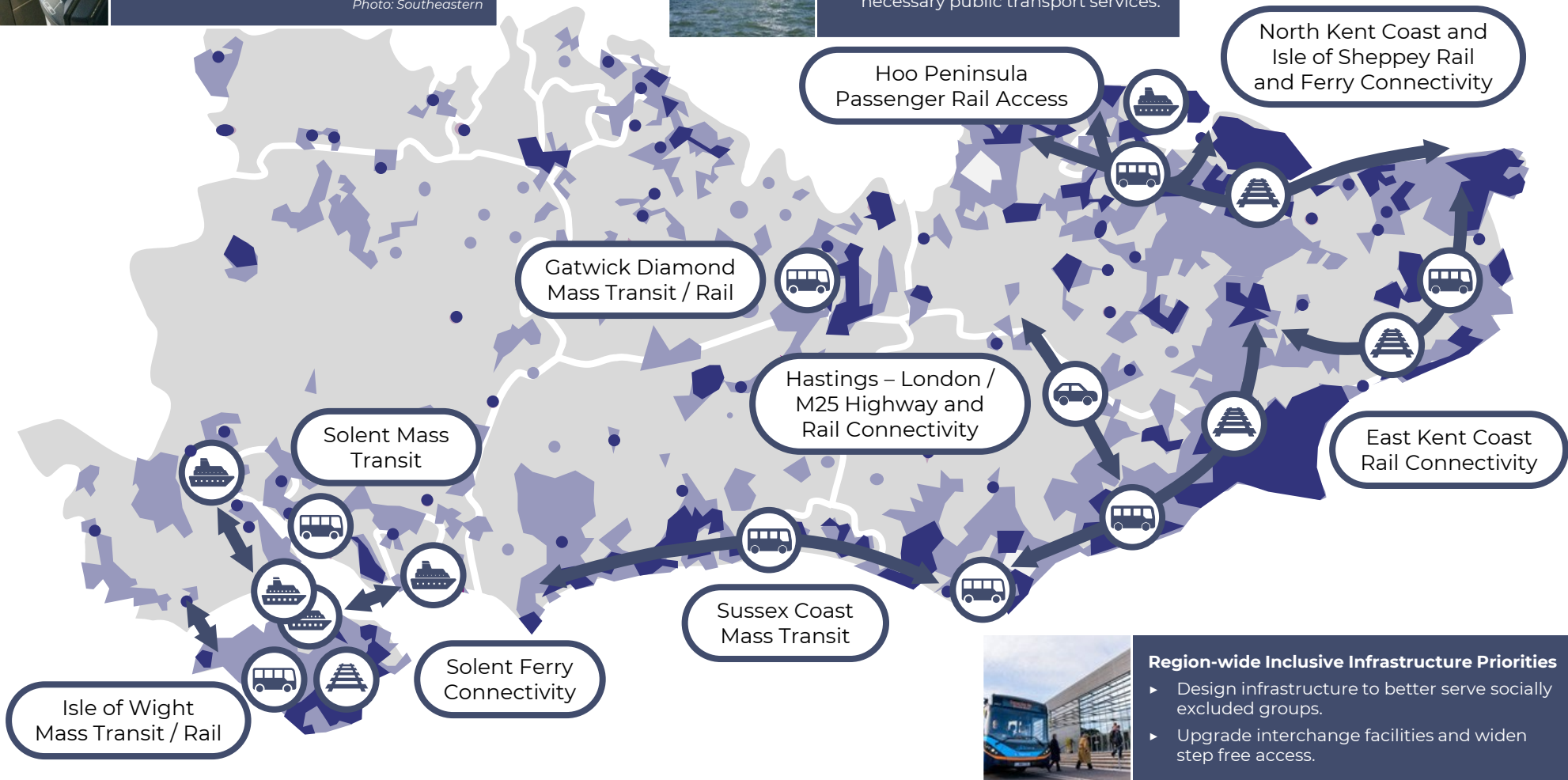
- ▶ Offer affordable fares and concessions.
- ▶ Implement integrated fares and ticketing systems.

Photo: Southeastern



Region-wide Service Priorities

- ▶ Deliver BSIPs and leverage new bus service delivery models.
- ▶ Provide and enhance socially necessary public transport services.



Region-wide Inclusive Infrastructure Priorities

- ▶ Design infrastructure to better serve socially excluded groups.
- ▶ Upgrade interchange facilities and widen step free access.

Medium risk
of TRSE



Higher risk
of TRSE



Railway



Highway



Mass transit



Ferry



Decarbonisation Mission



We will support the South East's transition to net zero by 2050 by enabling the shift to cleaner transport, promoting sustainable travel choices, and adopting new technologies that reduce emissions and improve the environment and quality of life.

We will have succeeded when:

- ▶ The South East makes meaningful progress towards decarbonising transport, in line with national policy and the public's expectations.
- ▶ All surface transport trips made across the South East are net zero emission by 2050 (at the latest).
- ▶ We have not exceeded our carbon budgets for surface transport by 2050.
- ▶ The transition to cleaner transport is affordable, fair, and accessible – ensuring no communities are left behind.

Short Term Priorities

We will accelerate the transition to low-carbon transport by:

- ▶ Rolling out EV charging infrastructure to support rapid EV adoption.
- ▶ Supporting uptake and recycling of cleaner vehicles and batteries.
- ▶ Making public transport more affordable and appealing, especially buses.
- ▶ Helping operators transition to zero-emission fleets.
- ▶ Expanding walking, wheeling, and cycling routes.
- ▶ Promoting liveable neighbourhoods that reduce car dependency.
- ▶ Addressing affordability barriers to low-emission transport.

Long Term Priorities

We will solidify the transition to a zero-emission system by:

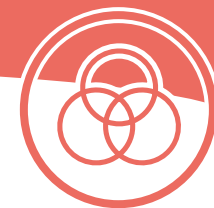
- ▶ Decarbonising rail through electrification and clean fuel technologies.
- ▶ Developing new rail and mass transit schemes to support modal shift.
- ▶ Ensuring power networks are clean, resilient, and ready for transport electrification.
- ▶ Reducing the levels of embodied carbon in transport infrastructure.
- ▶ Exploring fair, future-ready approaches to road user charging.
- ▶ Supporting alternative fuels for sectors harder to electrify, such as aviation and freight.

Decarbonisation Priorities



 Rail decarbonisation interventions are shown in this map – other rail and public transport interventions that promote modal shift are highlighted in Strategic Connectivity and Sustainable Growth missions

Sustainable Growth Mission



We will champion transport interventions that unlock investment opportunities, enable sustainable growth, and create healthy, vibrant, and well-connected communities.

We will have succeeded when:

- ▶ Population growth and economic development in the South East is underpinned by sustainable transport and infrastructure.
- ▶ The South East has created well-connected, liveable communities with easy access to key services and employment opportunities.

Transport Intervention Priorities

The mission also prioritises essential transport projects to support sustainable growth by:

- ▶ Expanding concessionary fare schemes to make public transport more affordable.
- ▶ Developing mass transit and Bus Rapid Transit systems in major centres.
- ▶ Upgrading suburban rail services, particularly in the Solent and Sussex Coast.
- ▶ Embedding walking and cycling infrastructure into new developments and local plans.

Enablers

Achieving these goals requires sustainable funding sources and regulatory support, including:

- ▶ Using funding tools like value capture and road user charging to forward-fund transport projects.
- ▶ Implementing fair demand management tools, such as workplace parking levies or clean air zones.
- ▶ Strengthening local planning capacity to ensure timely, effective decisions.
- ▶ Aligning with emerging planning reforms to support environmental net-gain alongside growth.



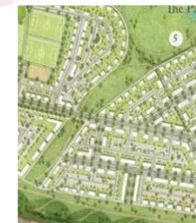
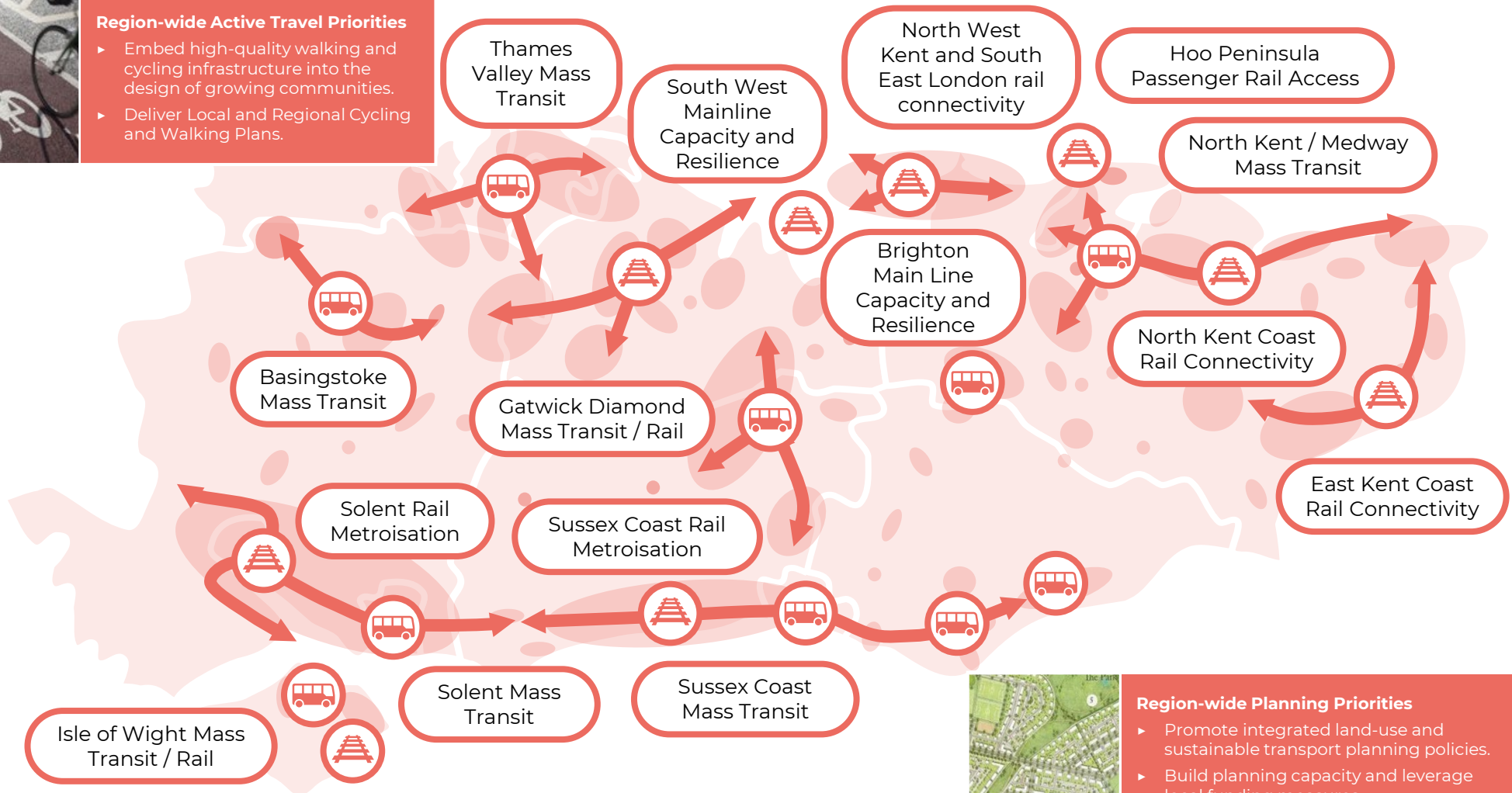
Photo: John Collins

Sustainable Growth Priorities



Region-wide Active Travel Priorities

- ▶ Embed high-quality walking and cycling infrastructure into the design of growing communities.
- ▶ Deliver Local and Regional Cycling and Walking Plans.



Region-wide Planning Priorities

- ▶ Promote integrated land-use and sustainable transport planning policies.
- ▶ Build planning capacity and leverage local funding measures.

Photo: South East Faversham

Highway 

Railway 

Mass Transit 

Growth area 

Delivery

TfSE is committed to turning its ambitious vision for the South East into action, building on the foundation provided by its Strategic Investment Plan (SIP) and Delivery Action Plan. TfSE is committed to keeping its strategy relevant and effective. Following this refreshed strategy, the SIP will be updated to align with the new missions. TfSE also plans to refresh the Transport Strategy every five years, ensuring its approach remains adaptable to evolving challenges and opportunities.

TfSE recognises the successful delivery of this strategy relies on collaboration across various stakeholders. TfSE will therefore drive policy prioritisation, stakeholder engagement, scheme development, and advocacy, while supporting local partners to build capacity in preparation for evolving governance structures, including the formation of strategic authorities. Local transport authorities will also play a crucial role, especially in delivering highway and public transport projects, while national infrastructure managers (Network Rail and National Highways) will lead major interventions on the railway and strategic road network. Private sector entities, including bus and rail operators, are also essential partners in delivering services and innovations.

Delivering meaningful change requires overcoming significant challenges, including financial constraints, fragmented resources, and increasing demand for public services. TfSE and its partners must embrace innovative solutions such as "beneficiary pays" models, greater devolution, and rail reform to secure sustainable funding. Where demand management tools are proposed, TfSE will work with partners to ensure these are fair and proportionate. Collaboration across all levels of government, transport operators, and the private sector is essential to achieve the region's goals.

TfSE will support its partners with tools such as scheme development funding, the Centre of Excellence, and its enhanced Analytical Framework, which underpins all major decisions from decarbonisation to freight planning. Regular updates to the Delivery Action Plan and the biennial State of the Region Report will ensure its strategies remain adaptable and focused on delivering tangible benefits.

Through this approach, TfSE is working to create a resilient, inclusive, and sustainable transport network – unlocking economic growth, enhancing accessibility, and tackling climate change for the benefit of the South East and its communities.

TfSE's Role

These are the key actions that TfSE and its partners will take to deliver this strategy.

 **Strategic Connectivity** 

- ▶ Develop business cases for schemes.
- ▶ Deliver freight transfer initiatives.
- ▶ Develop a coherent infrastructure pipeline for transport and utilities.
- ▶ Work with National Highways and Great British Railways to set priorities.
- ▶ Secure funding for first / last-mile connections to transport hubs.
- ▶ Improve connectivity to international gateways like ports and airports.
- ▶ Deliver the South East Rail Strategy

 **Resilience** 

- ▶ Identify TfSE's role in enhancing the resilience of the transport network.
- ▶ Develop an evidence base on key resilience risks (e.g. extreme weather).
- ▶ Make the case to government for consistent maintenance funding.
- ▶ Target investments in operational resilience across road and rail networks.
- ▶ Explore nature-based solutions to improve resilience of networks to extreme weather.

 **Inclusion and Integration** 

- ▶ Ensure impacts of TRSE are embedded in scheme design.
- ▶ Deliver best practices through the Bus Forum and South East Rail Partnership.
- ▶ Further develop evidence on interventions reducing social exclusion.
- ▶ Prioritise engagement with groups at risk of social isolation in policy and scheme development.
- ▶ Share best practice on integrated ticketing and fares.

 **Decarbonisation** 

- ▶ Embed the Carbon Assessment Playbook in scheme assessment.
- ▶ Accelerate freight decarbonisation and roll out EV infrastructure.
- ▶ Support the electrification of commercial vehicle fleets.
- ▶ Develop combined transport-energy investment opportunities.
- ▶ Work with Network Rail on rail decarbonisation solutions.

 **Sustainable Growth** 

- ▶ Identify forward funding opportunities for sustainable growth.
- ▶ Adopt the 'Healthy Streets' approach more widely across the region.
- ▶ Advise on impacts of new technology on transport and society.
- ▶ Provide case studies on land-use and transport integration.

 **Delivery and Enablers** 

- ▶ **Funding:** Develop a "beneficiary-pays" funding playbook.
- ▶ **Advocacy:** Advocate for increased, consistent funding from government.
- ▶ **Address delivery challenges:** Strengthen local planning through the Centre of Excellence and TfSE Analytical Framework.

Next Steps

TfSE is committed to keeping its strategy relevant and effective.

Following this refreshed strategy, the Strategic Investment Plan will be updated to align with the new missions.

TfSE also plans to refresh the Transport Strategy every five years, ensuring its approach remains adaptable to evolving challenges and opportunities.







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TRANSPORT FOR THE
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