Transport for the East Midlands

Board Meeting
15th December 2025
3.00pm to 4.30pm

Virtual Meeting via Microsoft Teams

AGENDA

1. Introductions and Apologies

2. Minutes & Actions of Board Meeting 29th September 2025*

3. Presentation by East Midlands Airport
    - Miles Pattison, External Affairs

4. Government Update*
    - 2025 Autumn Budget
    - Local Authority Bus Grant
    - Midlands Connect

5. East Midlands Rail Collaboration
    - Update from East Midlands Railway
    - Report of the Head of Rail Improvement*

6. TfEM Shared Priorities Update*

7. Any Other Business

8. Date of Next Meeting:
    - 9th March 2026: 11.00am – 12.30pm

*Paper enclosed

TfEM Terms of Reference

- To provide collective leadership on strategic transport issues for the East Midlands.

- To develop and agree strategic transport investment priorities.

- To provide collective East Midlands input into Midlands Connect (and other relevant sub-national bodies), the Department for Transport and its delivery bodies, and the work of the National Infrastructure Commission.

- To monitor the delivery of strategic transport investment within the East Midlands, and to highlight any concerns to the relevant delivery bodies, the Department for Transport and where necessary the EMC Executive Board.

- To provide regular activity updates to Leaders through the EMC Executive Board.

TfEM Membership

TfEM will comprise elected members nominated by the LTAs - to be determined by each authority but with an expectation it would the relevant portfolio holder. Senior representatives of the Department for Transport, National Highways and Network Rail will be invited to attend as ex-officio members.

Transport for the East Midlands

Board Meeting
Monday 29th September 2025

Virtual Meeting via Microsoft Teams

Minutes

Present:

Mayor Sir Peter Soulsby (Chair)	Leicester City Council
Cllr Chris McGiffen (Vice Chair)	North Northamptonshire Council
Cllr Charles Whitford	Leicestershire County Council
Cllr Gale Waller	Rutland County Council
Cllr Richard Butler	West Northamptonshire Council
Cllr Carmel Swan	Derby City Council
Cllr Linda Woodings	Nottingham City Council
Cllr Michael Cheyne	Lincolnshire County Council
Cllr Charlotte Hill	Derbyshire County Council

In attendance:

Verna Bayliss	Derby City Council
Surendra Wanza	North Northamptonshire Council
Penny Sharp	Rutland County Council
Daniel Pearman	Leicester City Council
Ann Carruthers	Leicestershire County Council
Chris Carter	Nottingham City Council
Donna Adams	East Midlands Railway
Laura Etheridge	East Midlands Railway
Will Rogers	East Midlands Railway
George Selby	East Midlands Railway
Andrew Hudson	Network Rail
Gavin Crook	Network Rail
Ian Doust	National Highways
Kamaljit Khokhar	National Highways
Mike Bull	Midlands Connect
Sarah Spink	Midlands Connect
Jackie Reay	DfT (Rail)
Andrew Pritchard	East Midlands Councils
Kyle William Butterworth	East Midlands Councils

Apologies:
None Notified

		ACTION
1.	**Introductions and Apologies**	
1.1 1.2	The Chair asked everyone to introduce themselves. There were no apologies notified	
2.	**Minutes & Actions of Board Meeting 10th June 2025**	
2.1 2.2	The Draft Minutes were agreed as a correct record There were no matters arising not on the agenda	
3.	**Appointment of Chair and Vice Chair**	
3.1	Members agreed the nominations of: • Chair of TfEM: Sir Peter Soulsby (Leicester City Council) • Vice Chair of TfEM: Cllr Chris McGiffen (North Northamptonshire Council)	
4.	**Presentation by National Highways**	
4.1 4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9	The Chair welcomed Kam Khokhar Head of Planning & Development (Network) for National Highways in the Midlands. Kam provided some background on the work of National Highways and the importance of the Midlands Strategic Road Network to the country as whole. In terms of resources, it was confirmed that Government had allocated just under £25b for the next Roads Investment Strategy period, which will run from April 2026 to March 2031. A number of commitments were announced following the Spending Review, including the A46 Newark Bypass and A38 Derby Junctions. Further details on these and other schemes will be available when the final Roads Investment Strategy (RIS) and National Highways' Delivery Plan are published in early 2026. However, Kam highlighted that the next RIS would have a greater emphasis on repairs and renewals, reflecting the age of existing assets and the number structures on the network. Finally, Kam drew attention to the Government's National Infrastructure Strategy and the work of the new National Infrastructure and Service Transformation Authority (NISTA), which aims to the improve the delivery and resilience of infrastructure. Cllr Gail Waller highlighted the condition on the A1 in the East Midlands which is inhibiting growth and undermining safety. Cllr Linda Woodings endorsed these concerns, recalling a family bereavement on the road. Kam acknowledged these concerns and highlighted recent safety improvements including 'gap closures'. Ian Doust from National Highways emphasised the number rights of way across the A1 and the need to address the basic condition of the road first in order to build the case for a more strategic enhancement at a future date. The Chair thanked Kam for his update.	

		ACTION
5.	**2025 Spending Review: Implications for the East Midlands**	
5.1	Andrew Pritchard provided an update on announcements made following the Spending Review, including confirmation of funding for the A511 (Leicestershire) and the North Hykeham Relief Road (Lincolnshire).	
5.2	Andrew also highlighted the Government's decision to pause indefinitely the electrification of the Midland Main Line (MMLe) - although noting recent positive comments made by the Prime Minister, and the lack of any new rail infrastructure investment in the East Midlands	
5.3	The Chair expressed his extreme disappointment at the pausing of the MMLe, which was endorsed by Cllr Waller and by Cllr Woodings.	
5.4	Cllr Woodings highlighted the impact on air quality in central Nottingham and analysis by East Midlands Councils highlighting the lack of transport investment in the region, concluding that it remained important to make the case to Government for the scheme.	
5.5	Andrew provided a brief update on other seven TfEM-Midlands Connect Shared Priorities: ▪ Nottingham-Leicester-Coventry Rail Connectivity ▪ Midlands-Leeds & North East Rail Connectivity ▪ A46 Growth Corridor & Newark ▪ A50/A500 Growth Corridor ▪ A5 Growth Corridor ▪ Improving Safety & Reliability on the A1 ▪ M1 Junction 24 & Surrounding Area	
5.6	It was reported that Catherine Atkinson MP secured a backbench debate on regional transport inequalities in the House of Commons which took place on the 11th September (further details at: Regional Transport Inequality - Hansard - UK Parliament).	
5.7	The debate took place following the most recent PESA release from the Treasury, which confirmed that transport spending per head in the East Midlands is now just 54% of the UK average and 52% of that of the West Midlands.	
5.8	Finally, it was reported that following the Spending Review, that the DfT has decided to cense funding Sub-National Transport Bodies (including Midlands Connect) at the end of March 2027, with limited transitional funding only available for 2026/7.	
5.9	The Chair expressed disappointment at the decision to cease funding for Midlands Connect, particularly for those areas which do not yet have Mayoral Combined Authorities, a point endorsed by Cllr Waller.	
5.10	Board Members noted the outcome of the 2025 Spending Review, and progress on the eight TfEM-Midlands Connect shared priorities and endorsed TfEM efforts to secure their delivery.	

		ACTION
6.	**East Midlands Rail Collaboration**	
6.1	Will Rogers, MD of East Midlands Railway provided an update on the following: ▪ **Fleet - Auroras:** Crew training is now well underway, and a phased roll-out of the new trains will start at the end of 2025 and continue throughout 2026. However, five existing Meridian trains will be cascaded to Lumo prior to the full Auroa roll-out, with three units being handed back by early December, resulting in some temporary short-forming. Seat reservations will be suspended on some services and ticket prices adjusted to manage demand. EMR will also put in place robust contingency plans and a command structure to manage the transition. ▪ **Fleet - Regional & Connect Refurbishments:** A second 158 unit is being refurbished in Bristol and work is also due to start shortly at Eastcroft Depot in Nottingham. A fourth refurbished 170 is expected to enter service shortly and the scope of works has been extended to include vestibule painting. Refurbishment of the first 360 unit has commenced. ▪ **December 2025 Regional Timetable Change:** The new timetable will be introduced on Sunday 14th December. Core element will be a doubling of Lincoln-Nottingham services from Monday to Saturday (2,000+seats per day), but also wider improvements across regional routes. The new timetable will generate +£1m pa revenue and +£2.4m social value pa. ▪ **Autumn 2025 Timetable:** Minor timetable changes will operate between 27th October and 29th November on the Skegness-Nottingham and Nottingham-Lincoln lines to mitigate the impact of leaf-fall. ▪ **Business Update:** EMR continues to sit above the national T-3 target and revenue is up +3.2% year on year across the last 3 periods. From 14th September EMR will introduce new penalty fare routes to reduce ticketless travel. Access to platforms via the Nottingham Central Footbridge is now restricted between 7.00pm and 6.00am – although the public right of way across the Station will remain open 24/7. The digital 'pay as you go' pilot between Nottingham, Derby and Leicester is on-going. EMR generated over £232m in Social Value in 2024/25. ▪ **Political Engagement:** The 158 first in class refurbished unit was launched at Nottingham Station on the 24th July and EMR welcomed Baggy Shanker MP to the Etches Park Depot. ▪ **Community Engagement:** EMR is the first English TOC to secure 'Investor in Volunteer' status and EMR undertook a number of activities during 'Rail Safety Week'.	
6.2	Cllr Waller reported that she had experienced difficulties reading the details of an Advance Purchase ticket she had downloaded and then printed off due to a sight impairment. Will Rogers agreed to look into the issue. Cllr Waller also sought clarity on the timescales for completing the 360 refurbishments.	
6.3	Cllr Woodings raised concerns the impact of short-forming and suspended seat reservations on people with restricted mobility and on those travelling with children and questioned why EMR rolling stock was being transferred to an open-access operator to the detriment of services on the Midland Main Line - a point reinforced by the Chair. Will Rogers responded by noting that the rolling stock cascade to Lumo was subject to a commercial agreement, but that EMR would be actively managing the situation to limit the short-term impacts on EMR passengers.	

		ACTION
6.4 6.5 6.6 6.7	The Chair thanked Will for his update Kyle Butterworth provided an update on quarterly activity under the Rail Collaboration Agreement. In particular, he highlighted a draft document ('Keeping Pace') which sets out the strategic case for sustaining and improving rail connectivity to Lincoln. Members agreed to authorise officers to finalise 'Keeping Pace' and then to launch and communicate the document as appropriate. Finally, Andrew Pritchard described how the Rail Collaboration Agreement would likely terminate when GBR is established in April 2027, but that there were sufficient resources to continue current activities until March 2027 based on 2025-6 partner contributions only.	**EMC/ GLCCA**
7.	**Any Other Business**	
7.1	None notified	
8.	**Dates of Future Meetings**	
8.1	Monday 15th December 2025: 3.00pm - 4.30pm	

Transport for the East Midlands
15th December 2025
Item 4: Government Update

1. Introduction

1.1 This paper provides a brief update on recent Government announcements from a transport perspective, including the Chancellor's Autumn Budget.

2. Autumn 2025 Budget

2.1 The only major infrastructure announcement in the Budget related to the Lower Thames Crossing. The Government has committed a further £891 million to complete the publicly-funded works, the final tranche of government support to enable the private sector to take forward construction and long-term operation. The Government's preferred financing option at this stage is the Regulated Asset Base (RAB) model. The project will be taken forward on that basis, with formal market engagement launching in 2026.

2.2 There were two announcements related to vehicle taxation:

- The introduction of an electric vehicle excise duty (eVED), a new mileage-based charge for electric vehicles and plug-in hybrid cars, from April 2028. The Government said eVED would not initially apply to vans, buses, motorcycles, coaches and HGVs. It added an average electric vehicle driver would pay around £240 per year in eVED, raising £1.1bn in 2028/29, £1.4bn in 2029/30 and £1.9bn in 2030/31; and

- Extending the 5p fuel duty cut until the end of August 2026 with rates then gradually returning to March 2022 levels by March 2027. The planned increase in line with inflation for 2026-27 will also be cancelled.

2.3 In relation to rail, the Government is introducing a one-year freeze of regulated rail fares for the first time in 30 years. Whilst this is clearly good news for passengers, it is not clear if there will be any knock-on impacts for services due to lower than planned for levels income for train operating companies.

3. Local Authority Bus Grant (LABG)

3.1 LABG allocations were published on the 5th December 2025. Figures for the East Midlands are summarised below.

LTA	2025-26	2026-27	2027-28	2028-29
EMCCA	£21,656,441	£21,848,207	£21,848,207	£21,848,207
GLCCA	£9,357,680	£11,214,192	£11,214,192	£11,214,192
Leicester City	£4,287,220	£5,359,025	£5,359,025	£5,359,025
Leicestershire	£5,008,357	£4,757,939	£4,757,939	£4,757,939
N Northants	£2,615,187	£2,747,301	£2,747,301	£2,747,301
Rutland	£496,418	£471,597	£471,597	£471,597
W Northants	£2,770,286	£3,277,286	£3,277,286	£3,277,286
Totals	**£46,191,589**	**£49,675,547**	**£49,675,547**	**£49,675,547**

3.2 Local transport authorities will have the flexibility to use LABG funding to meet local needs, whether by reducing fares, introducing new routes, investing in zero-emission buses or improving bus stops and stations.

3.3 As a condition of receiving LABG funding, local authorities will be asked to use a proportion of their allocation to participate in Transport Focus' 'your bus journey' annual survey. This will enable the survey to be expanded, helping provide passengers with a consistent view of their local bus services.

4. Sub-National Transport Bodies

4.1 The Government has confirmed that funding for Sub-National Transport Bodies including will cease in March 2027 with only transitional grant at a 'substantially reduced' rate available in 2026-7

4.2 The Midlands Connect Strategic Board met in the 27th November 2025 and agreed a Transition Plan and Budget for 2026-7 as the basis for a submission to DfT for transitional grant to be submitted in the first week in December. DfT will look to confirm the level of grant awarded early in 2026.

4.3 In addition, WMCA and EMCCA have commissioned consultants to undertake an 'independent review' of opportunities for pan-regional collaboration in the period post March 2027. Initial findings will be discussed at the next meeting of the Strategic Board in March 2026.

5. Recommendation

5.1 Members are asked to consider this report and direct officers accordingly.

Key Contact
Andrew Prtichard
Andrew.pritchard@emcouncils.gov.uk

Transport for the East Midlands
15th December 2025
Item 5b: Report of the Head of Rail Improvement

1. Introduction

1.1 This report updates members on the implementation of the Rail Collaboration Agreement[1] between TfEM and Department for Transport across Policy, Rail Operations, Rail Enhancements, and the TfEM Officer annual rail workplan.

2. Government and Policy

2.1 The Passenger Rail Services legislation gained assent in late 2024. This legislation could enable the East Midlands Railway (EMR) National Rail Contract to be terminated at the end of its core term in October 2026, with CrossCountry following in October 2027. West Midlands Trains who operate services inclusive of Northamptonshire in the East Midlands will be nationalised in February 2026[2].

2.2 The second phase of rail reform legislation, 'The Railways Bill 2026', commenced in Parliament on November 5th 2025[3], and sets out the power for the Secretary of State (SoS) to set up the body Great British Railways (GBR) – a new publicly owned company, which will bring together the management of passenger services and rail infrastructure. In tandem, the government's response to the consultation on the forerunner document 'A railway fit for Britain's future' was published[4]. They confirm that new 'Business Units' will form the regional structure of the organisation; but exact geographic boundaries were left unconfirmed. The anticipated 'statutory role' for MSAs was clarified at its most simple interpretation as: 'provision of views on GBR strategy and plans', whilst also legally making provision for GBR to: "*...enter into arrangements with a relevant local government body about the exercise...of its statutory functions ...in the body's area*". The government also reaffirmed its commitment to publish its rail strategy for GBR and to consult on the first GBR licence. Whilst this is a major milestone, the Transport Select Committee chair Ruth Cadbury MP said: "When all is said and done, what difference will passengers notice?"[5] and this will take some time to be revealed.

[1] https://www.gov.uk/government/news/greater-voice-for-rail-passengers-in-new-collaboration-between-government-and-east-midlands transport-leaders
[2] https://www.modernrailways.com/article/west-midlands-trains-enter-public-ownership
[3] https://publications.parliament.uk/pa/bills/cbill/59-01/0325/240325.pdf
[4] https://www.gov.uk/government/publications/a-railway-fit-for-britains-future-government-response
[5] https://committees.parliament.uk/committee/153/transport-committee/news/210085/railways-bill-transport-committee-launches-new-inquiry-into-govts-landmark-legislation/

2.3 Separately but in tandem with the GBR legislation, the Governments roadmap for improving rail accessibility through GBR was published[6]. This is largely an amalgamation of all the existing workstreams on rail accessibility and some additional narrative on ambition. Whilst not committing anything new for the East Midlands, it did identify that nationally *"approximately 56% of stations and around 66% of the 1.3 billion journeys that take place on the network nationally have step-free access to platforms.....level-boarding (street-to-seat independence) is rare, present at just 4% of stations"*. The document states that *"the long-term strategy for rolling stock and infrastructure, which the government expects to publish in 2026, will include our approach to improving level boarding"*.

2.4 The Budget at the end of November[7] provided no additional details for rail in the East Midlands above what was previously published at the Spending Review in the Spring[8]. Nationally a new commitment to freeze regulated fares for a year was confirmed[9]. Transport department budgets were largely static for both capital and revenue; but 'Total Managed Expenditure' has been increased in this Budget, so Transport now makes up a lower proportion of state investment than it did prior.

3. Operational Update (Note: Members will receive a briefing from EMR at the Meeting)

EMR Strategy and Fleet Replacement Programme

3.1 The first new intercity Hitachi Aurora trains, originally scheduled for passenger service into the East Midlands in 2022, are being introduced to initial passenger services from December 2025. Existing Meridian units are being progressively taken out of service, with EMR operating their intercity service with a shortfall of rolling stock and capacity. EMR have commenced their plan to minimise the impact on passengers through short forming trains during this time. Any *further* delays to receipt of high-performing trains beyond the latest plans will risk increasing the shortfall of units for EMR even further still.

3.2 Following the launch of EMRs refurbished class 170 and class 158 regional train units, we anticipate the launch of the first refurbished class 360 unit. EMRs refurbishment programme will continue for at least two more years. Achieving a tipping point when East Midlands regional customers are more likely than not to be served by a refurbished unit will be a big benefit to the perception of rail travel in this region.

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6 https://assets.publishing.service.gov.uk/media/6909e9a17a88fd270a95fd55/Our_roadmap_to_an_accessible_railway.pdf
7 https://www.gov.uk/government/collections/budget-2025
8 The 2025 Spending Review confirmed no new rail investment through central capex (RNEP) for the East Midlands for the rest of the Parliament.
9 https://www.gov.uk/government/news/first-rail-freeze-in-30-years-to-ease-the-cost-of-living

3.3 Looking ahead, December sees a significant regional timetable restructure for EMR. It will see the TfEM priority of two-trains-an-hour delivered between Lincoln and Nottingham on weekdays between 0600 and 1800. EMRs timetable restructure in December will be in union with the restructure of operating patterns on the East Coast Mainline.

3.4 With the disappointing decision to pause any further electrification of the Midland Mainline, EMR will need to revisit their previous plans for long term fleet replacement as previous proposals assumed electrification of the MML would be in place. Given the long lead times to agree a business case and deliver a rolling stock cascade for a fleet replacement, decisions about what follows the current regional fleets in the next decade should be decided in the next planning cycle. In the absence of any alternative industry or governmental plans for rail improvement in the East Midlands, the TOCs own strategy for looking at this horizon in the East Midlands is pertinent.

3.5 CrossCountry published a short-term sustainability strategy which included a commitment to establish targets for 'connectivity reporting' by December 2026[10]; although it is unclear as to what this is in practice, or what these measures will mean for poorly connected locations in the East Midlands. It also proposes to provide supporting evidence (such as costs) to introduce a fleet in 2035 to replace the current Voyager diesel units, one that: ".... meets the latest environmental and emissions standards".

<u>Performance</u>

3.6 For period 8 (12th October – 8th November), EMR performance was 71.7% for T-3 punctuality against an 81.4% national average[11] so 9.7 percentage points worse than the national average.

3.7 EMR offered 1.5% of TOC on Self cancellations against an NRC upper target of 1.9%. The ToS cancellations is within a context of a 2.2% all-cancellations period score which is what customers experience.

3.8 In period 8, EMR offered short formations of 1.2% against an upper tier target of 0.9%.

3.9 ORR quarterly data identified that 451 million journeys were made by rail passengers in Britain from April to June 2025 – up 7% on the previous year's equivalent quarter. Journeys rose across all operators, with seven TOCs up more than 10% year on year. Revenue reached £3.1 billion - a 6% real-terms increase.

[10] https://www.crosscountrytrains.co.uk/sites/default/files/accessible/CrossCountry%20Sustainability%20Strategy%202025.pdf
[11] https://www.networkrail.co.uk/who-we-are/how-we-work/performance/railway-performance/

Q1 FY2526 for EMR observed 8m passenger journeys, a 6% increase on last year, and up 23% from 6.51m in the equivalent quarter pre-pandemic[12].

4 Rail Enhancement Projects Update

TfEM Shared Priorities (Rail)

4.1 The 'TfEM Shared Vision'[13] for transport investment priorities will be refreshed for a 2026 re-launch. With the change in funding status of Midlands Connect it is not clear whether these will again be 'shared' with Midlands Connect, a new regional transport body, or confined to the shared ambitions of TfEM member authorities.

4.2 With regard to updating the priority for rail-led improved city connectivity: HS2 to the region has been cancelled, and the safeguarding of the land lifted. HS2 Phase 1 continues in construction and includes a seven-platform station at Birmingham Curzon Street and junctions east of Birmingham that were designed to accommodate previous plans for HS2 Phase 2 services from Birmingham to the north. Options could now include how it might be possible to use this HS2 infrastructure to enable Midlands Rail Hub (MRH) outputs instead of the previously proposed platforms at Moor Street. In parallel, Network Rail are still developing a Programme-wide MRH Outline Business Case (OBC) using Moor St. Relevant to this emerging picture, new modelling for TfEM in 2025 identified that the top priority for most principle East Midlands cities was indeed to improve generalised rail journey times to Birmingham.

4.3 The Midlands Connect sponsored Coventry-Leicester-Nottingham service reinstatement proposal is seeking a further £5m from current DfT RNEP provisions for development of the next stage of the design, estimate and business case. The proposals would almost halve today's journey times between Leicester and Coventry[14].

Industry Enhancement Strategic Planning:

4.4 Network Rail are completing their MML route study, looking at the horizon for coping with forecasted growth, and also the opportunities for improvement; essentially refreshing the comprehensive study last maintained in 2016. With the recent decision to pause the electrification of the MML there are now no committed rail infrastructure improvements for the East Midlands, so this Network Rail advice could now be viewed with renewed importance. It is anticipated that any Midlands Rail Hub outputs for the East Midlands would need to be recommended through future GBR 'Strategic Advice'; specifically from that

[12] https://dataportal.orr.gov.uk/media/mf4hzaeb/passenger-rail-usage-apr-jun-2025.pdf
[13] https://www.emcouncils.gov.uk/wp-content/uploads/2024/04/TfEM-Shared-Vision-2024.pdf
[14] Now 56mins vs proposals for ~30mins.

which currently aligns to the North West & Central route of Network Rail which advises on the strategy for Birmingham stations.

4.5 The Network Rail Strategic Planning team continue their workstream looking at the East Coast Mainlines constrained capacity, including locations that could see a change to their existing services, such as Lincoln.

Other Infrastructure

4.6 On 22nd October, the new train crew accommodation at Station House in Lincoln was handed over to EMR.

4.7 The East Midlands Combined County Authority (EMCCA) has approved the commencement of their 12-week Local Transport Plan (LTP) consultation, with initial materials published in the period[15]. This identifies the EMCCA LTP ambition as: "*By 2040, people in the East Midlands will have easy and reliable ways to travel and stay connected, whether by improved transport or digital connections like the internet*". For rail this means: "*It is our ambition to create an integrated, sustainable, and accessible rail network that connects all East Midlands residents efficiently to railway stations, supporting economic growth, reducing carbon emissions, and promoting social inclusion*". The top three transport priorities are proposed as:

1. To make travelling by public transport easier and more affordable.
2. To connect all our communities by giving people travel choices that go beyond reliance on the car.
3. To bring our highways into a good state of repair, so they can offer reliability despite changing travel demands and a changing climate.

The draft EMCCA LTP does not propose commitments to fund any specific rail intervention at this stage.

5 TfEM Rail Work Programme

5.1 Due to the details that were proposed in the Devolution White Paper, the existing TfEM Rail Collaboration Agreement has been briefed to Members and Officers as subject to transition to Mayoral Strategic Authorities (MSAs) when GBR is established in 2027.

[15] https://democracy.eastmidlands-cca.gov.uk/documents/s2511/Item%205b%20-%20Mayors%20Transport%20Plan%20-%20Executive%20Summary.pdf

5.2 The launch of 'Keeping Pace: Enhancing Lincoln City's rail connectivity, both now and in the near future'[16] occurred with Mayor Dame Andrea Jenkyns, Cllr Sean Matthews, TfEM Chair Mayor Sir Peter Soulsby all quoted in press. (See APPENDIX A).

5.3 In the period, TfEM Officers have finalised with their consultant Systra their East Midlands city connectivity modelling results. The exercise indicates (when caveating the assumptions that underpin the exercise), that improving rail connectivity between Derby, Leicester and Nottingham to Birmingham and the wider Black Country is the largest economic opportunity, with Yorkshire and the North-West consistently in second and third place as priorities for each of Derby, Leicester and Nottingham. The exception is Lincoln, where improving rail connectivity to London and then Yorkshire the economic priorities. This evidence will feed into the process for revising the TfEM 'Shared Vision' for transport priorities document in 2026.

5.4 This period TfEM Officers and Systra are sharing with other LTA Officers the initial draft of 'The 360° Agenda of Transport for the East Midlands' ahead of the wider review with external stakeholders. (See APPENDIX B). The intention is that a summary of this document will be issued publicly as part of a timely TfEM response after the governments 'Integrated Transport Strategy' is published.

5.5 In the next period, TfEM Officers and Systra will be moving on to commence the final documents within the rail workplan, both on multimodal freight and on whole-region messaging to GBR.

6 Recommendations

6.1 The TfEM Board are invited to:

- Note the quarterly board report and appendices.

Key Contact:
Kyle William Butterworth, Head of Rail Improvement
Kyle.Butterworth@emcouncils.gov.uk

Appendices:

- APPENDIX A – Keeping Pace: Enhancing Lincoln City's Rail Connectivity
- APPENDIX B – WORKING DRAFT: 'Routes to prosperity: The 360° Agenda of Transport for the East Midlands'

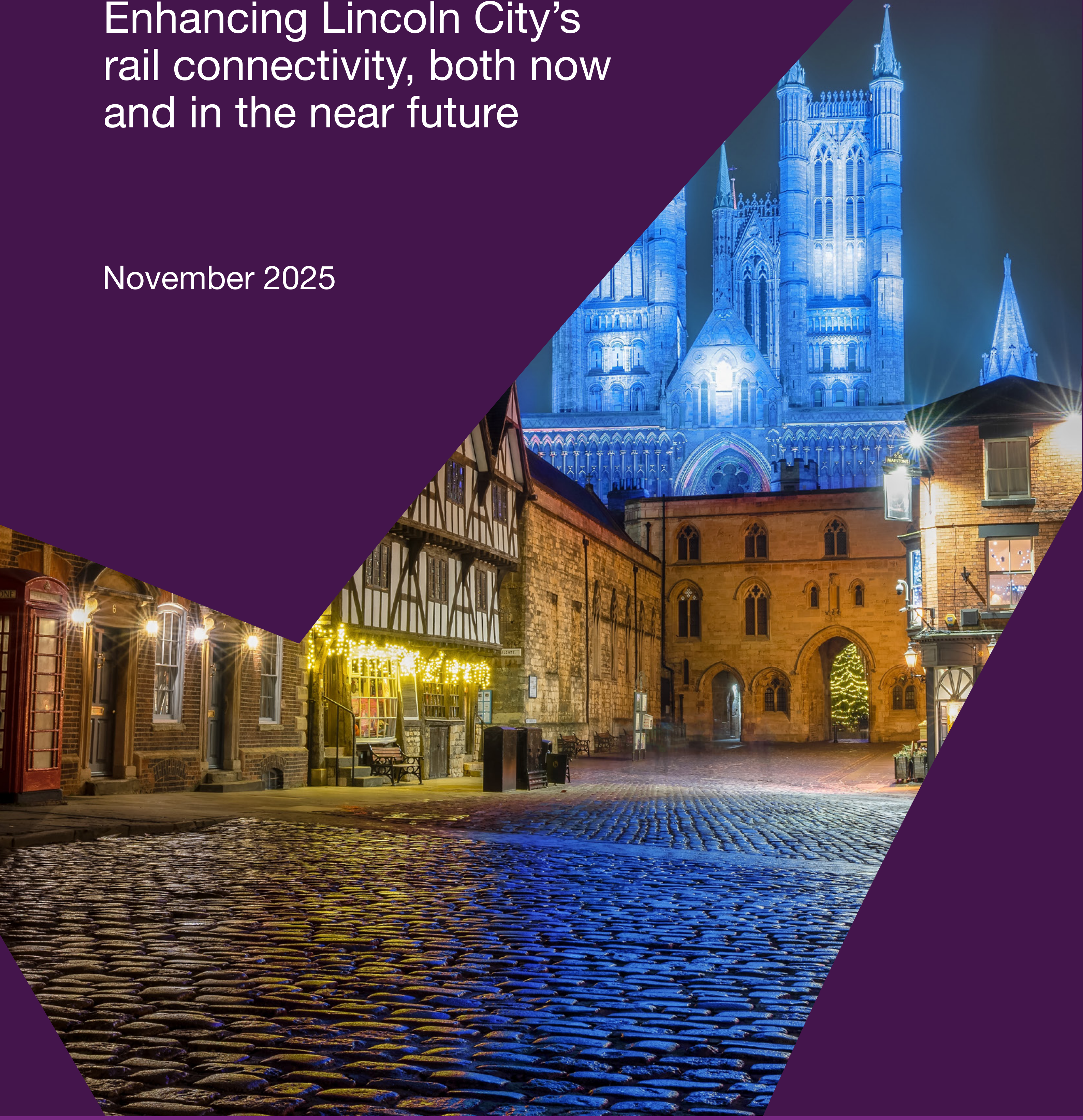
[16] https://www.emcouncils.gov.uk/lincoln-rail-uplift-welcomed-as-leaders-set-out-higher-ambitions-for-future-connectivity/

Transport for the East Midlands

KEEPING PACE:

Enhancing Lincoln City's rail connectivity, both now and in the near future

November 2025



FOREWORD: Keeping Pace with Growth

Lincoln is an ambitious city with a young and rapidly growing population. Lincoln's diverse economy spans agrifood, tourism, logistics and manufacturing, and its cultural and historic offer attracts millions of visitors each year. New homes and jobs are being created at pace, and the city is already home to two universities with a combined student population of over 20,000[1].

But while Lincoln has moved forward, its rail services have not kept pace. Councils and local partners have long campaigned for better connections, recognising both the importance of frequent services to Nottingham and direct links to London.

That persistence is starting to pay off. From December 2025, services between Lincoln and Nottingham will double from hourly to half-hourly, a long-awaited breakthrough that will strengthen the city's role within the wider East Midlands economy. Together with the two hourly daily direct London services, this timetable should now be seen as the baseline level of connectivity that Lincoln requires.

As Lincoln grows, further investment in infrastructure and trains will be essential. Regional links made more convenient and resilient for passengers, faster journey times, and the removal of capacity constraints are all needed to match the scale of Lincoln's growth and ambition.

Transport for the East Midlands (TfEM) and the Greater Lincolnshire Combined County Authority (GLCCA) have a shared vision that sees a better-connected Lincoln City as a priority for the East Midlands transport network and the East Midlands economy.

Mayor Sir Peter Soulsby: Chair Transport for the East Midlands

Dame Andrea Jenkyns: Mayor of Greater Lincolnshire Combined County Authority

Cllr Sean Matthews: Chair of GLCCA Transport Board, Chair East Midlands Councils and Leader Lincolnshire County Council

Cover: Michael Oddi: Shutterstock.com

Lincoln City: In Profile

100,000+
population and one of the fastest-growing cities in the East Midlands

12,000
new jobs by 2036

3 million
visitors a year

31,000
new homes expected by 2045

£264 million
of economic activity

A young, ambitious city whose future success depends on reliable, frequent, and fast rail services

As Lincolnshire's only city - and its principal economic and administrative centre - Lincoln plays a critical role in driving the county's future. Regional partners see stronger transport links with Lincoln as essential to unlocking both the city and the county's full potential.

Lincoln's population increased by 11%[2] between 2011 and 2021 to more than 100,000 people, making it among the top five fastest-growing local authorities in the East Midlands. It has a young demographic, with 13% of residents classed as young adults, including over 20,000 students[3] studying at the University of Lincoln and Lincoln Bishop University.

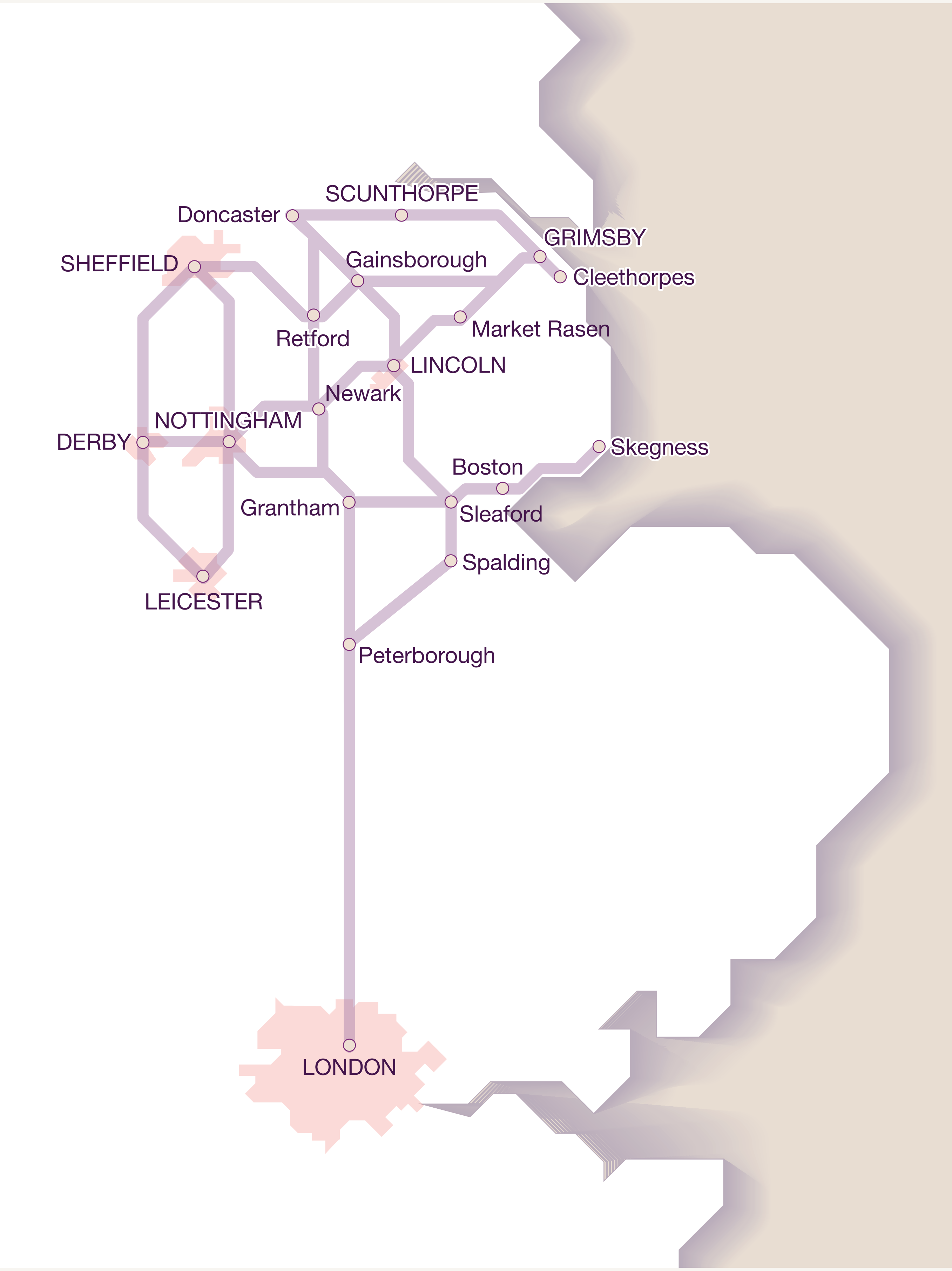
The city's economy is diverse, with strengths in agrifood, tourism, logistics, and manufacturing, and employment opportunities are on the rise; a projected 12,000 new jobs[4] are planned by 2036, with a Government expectation of 31,000 new homes in the Lincoln housing area by 2045. These are particularly focused around Charterholme, an intensive growth corridor to the west of the city centre, close to the Castle Line, which links Lincoln with Newark and Nottingham.

Despite these positive trends, Lincoln faces challenges related to transport and productivity. More than a quarter (28.38%[5]) of its households do not have access to a car or van, creating clear transport disadvantages. Those who do, remain heavily reliant on car travel due to limited rail connectivity, contributing to high emissions and limiting progress on decarbonisation.

Rail has not kept pace with the city's growth, leaving tourism and business at a disadvantage. As a historic cathedral city with a strong independent retail scene, Lincoln attracts over 3 million visitors annually, generating £264 million for the local economy[6]. Yet it competes with better-connected cathedral cities such as Durham and York who, in the case of York, enjoy around 40 trains per day to London and a fastest journey time of under two hours.

Furthermore, the city's relative isolation has resulted in lower-than-average productivity and economic growth, as measured by GDP and GVA[7], even as new initiatives like the Lincoln Science and Innovation Park point to its potential. Some important labour market opportunities also remain limited: Lincolnshire sits among the lowest third of local authorities for opportunities for 16-29-year-olds, and the bottom quarter in terms of promising prospects for 25-44-year-olds[8].

With the right transport investment, Lincoln has the opportunity to change this trajectory and strengthen its role as a dynamic regional hub.


SCUNTHORPE
Doncaster
GRIMSBY
Gainsborough
Cleethorpes
SHEFFIELD
Retford
Market Rasen
LINCOLN
Newark
NOTTINGHAM
DERBY
Skegness
Boston
Grantham
Sleaford
Spalding
LEICESTER
Peterborough
LONDON

A Steep Hill: Lincoln's Rail Ambitions

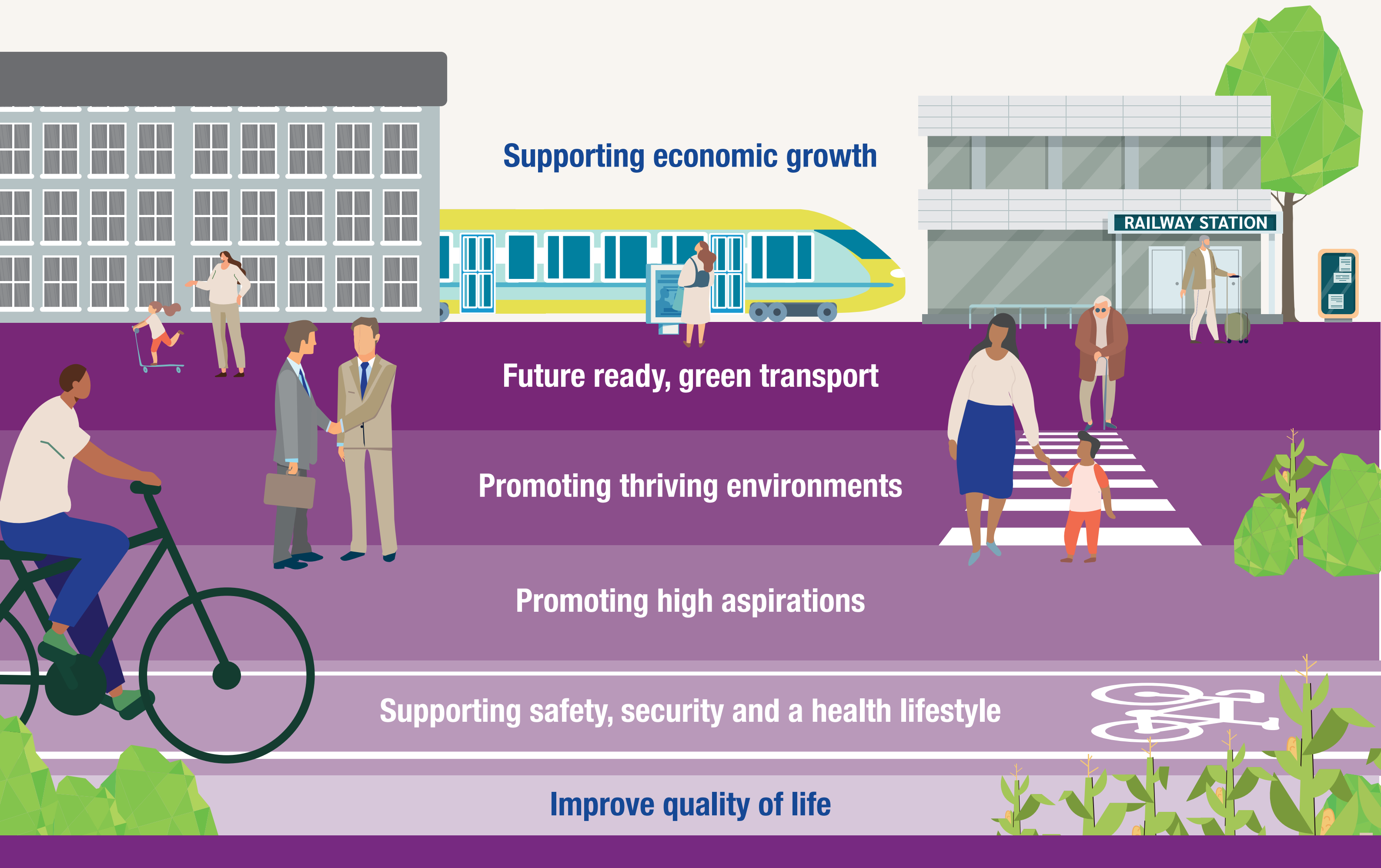
A Regional Priority

Right now, train services from Lincoln to most major destinations are simply not good enough - they're too infrequent, too slow, and too often overcrowded, making driving the default choice for many.

This has direct consequences for the A46 corridor towards Nottingham and Leicester, with around 19,000 car and van trips daily creating unreliable journey times, and the corridor predicted to be approaching capacity at key junctions by 2035[9]. Commuters and leisure travellers are forced to compete with freight and agricultural traffic, compounding delays and unreliability. Improving the Lincoln-Nottingham rail corridor is a priority identified for both TfEM and Midlands Connect[10].

Investing in better rail doesn't just mean faster and more reliable trains - it means connecting more people to jobs, education, and leisure across the region - making Lincoln a vibrant, accessible place to live and work within the wider region.

Upgrading Lincoln's rail links directly supports the goals of the Lincolnshire Local Transport Plan[11]:



Slow Progress

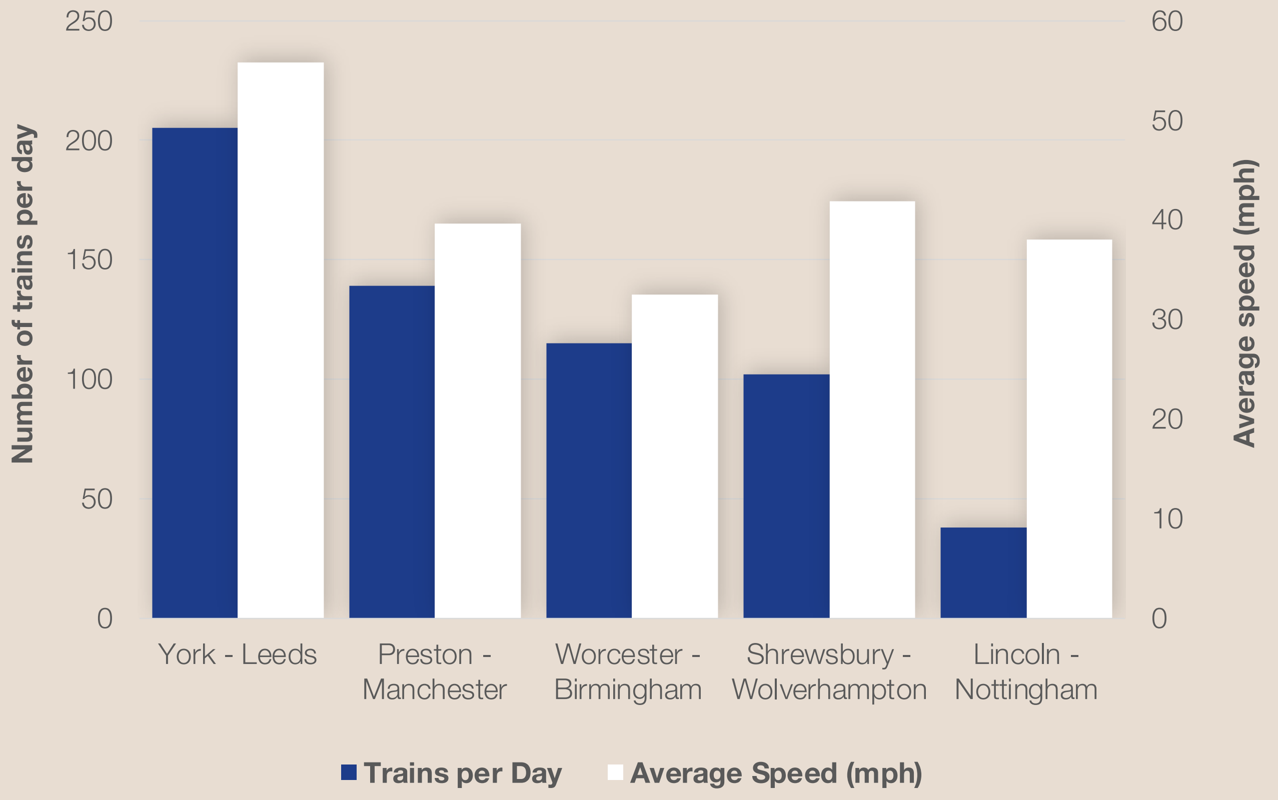
Yet, with some market shares stuck below 10%[12], meaningful progress has been slow. The East Midlands as a whole has seen less government investment in rail than most other regions for nearly two decades[13], and this reality is reflected in the rail service quality at Lincoln - slow journey times and a poor frequency of direct services. Trying to secure real improvements to rail for the city and wider region has often felt like a struggle against long-standing underinvestment.

Setbacks

Lincoln's rail service has at times lost ground, losing direct trains to key economic centres in the Midlands like Birmingham, and also its faster regional services to places such as Sheffield. Many promised regional link improvements for Lincoln from previous rail franchises, like those in the East Midlands operators' 2019 agreement, have never materialised. In the years following the pandemic a number of Lincoln's rail services were also chosen to be paused for extended periods before being only partially reinstated[14]. Even this year, a scarce and economically significant direct London Sunday service is being cut from December 2025. These setbacks indicate that the true potential of Lincoln's growing market continues to be underestimated and underserved by the rail industry - a missed opportunity both for the industry and for the city's economy.

An example of how Lincoln is underserved is demonstrated in the graph[15] below, illustrating that Lincoln-Nottingham services, as an example, have lagged behind other regional city pairings for both service levels and average speeds.

Figure 1 Number of trains per day and average speed (mph) between comparable inter-city locations



Jayne Wingad: Lincolnshire County Council

Building From a Low Base

Despite these challenges and low modal share, Lincoln has shown resilience. While rail passenger numbers across the UK between 2019/20 and 2023/24 dropped by 6%, demand at Lincoln actually grew, climbing 4.7% from 1.96 million to 2.05 million[16].

Councils and local partners, such as the Nottingham to Lincoln Stakeholder Board, did secure some important service improvements between 2015-2018 that stepped up the timetable between Nottingham and Lincoln and at weekends, which led to a sustained increase in use.

The Castle Line is now seeing strong growth again, with over 1.1 million customer journeys in 2024, a rise of 21% compared with 2023. By 2030, passenger growth at Lincoln station is forecast to have increased by 11% compared to 2019[17]. This underlines the strength of local demand and signals to latent demand to be unlocked. Lincoln is well-positioned to capture further growth in leisure travel and tourism by rail[18], but this potential can only be realised if the current gaps in connectivity are addressed and services are brought up to modern standards.

Closing the Gap

Breakthrough

The East Coast Main Line crossing at Newark-On-Trent has been a long-standing constraint to the East Midlands regional network to Lincoln. Now, planned changes to the East Coast Main Line this year have created a window of opportunity for local operators to be able to in-tandem rethink the Lincoln-Nottingham corridor. From December 2025, the hourly service will double to half-hourly, Monday to Saturday. With Nottingham being the largest economic hub of the East Midlands, and Lincoln ranking as the region's fifth largest city, these stronger rail links can promise to contribute to connectivity and economic opportunity at a regional scale.

Improvements on Track

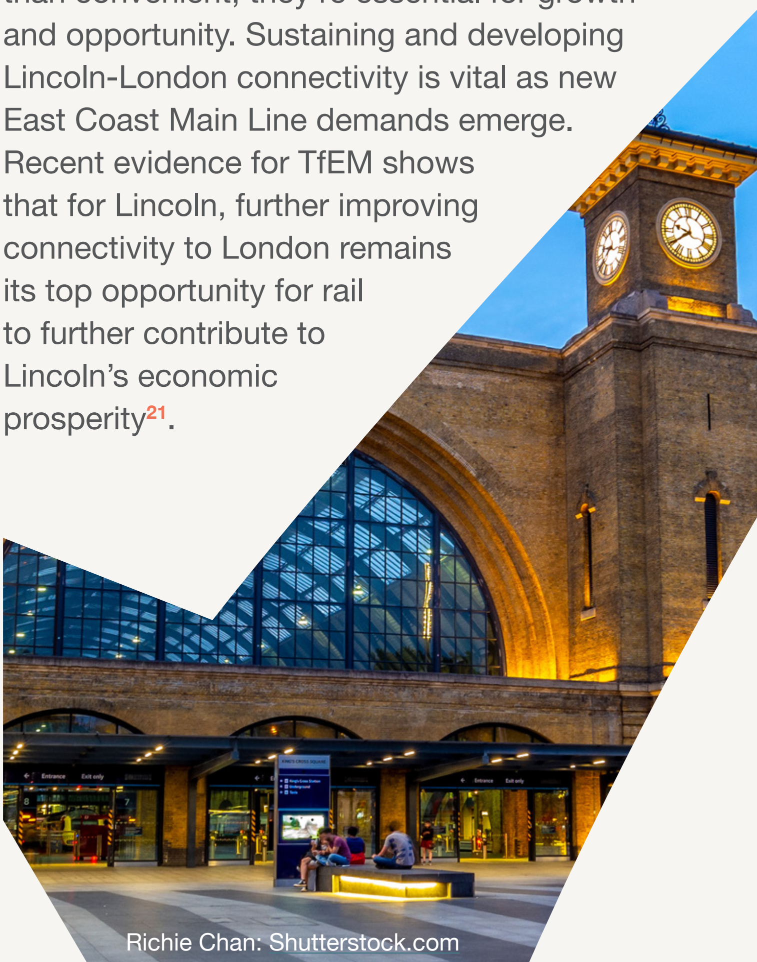
This uplift of the service will add 12 additional daily services in each direction between Nottingham and Lincoln and more than 2,000 extra weekday seats. It will make turn-up-and-go travel more attractive, reduce waiting times, and ease overcrowding. More frequent calls at route stations and new direct links, including to Derby, will also make many longer onward trips via one change more readily accessible. Analysis for TfEM conservatively estimates £8.4 million in economic benefit directly for users and 1 million additional passengers over 15 years for journeys from Lincoln, with other parties indicating the opportunity is even higher still.[19]

Coupled with the investment for the A46 announced in the 2025 Spending Review, this provides the basis for a transport future that will finally bring this key regional corridor up to speed.

Capital Gains

The transformation of Lincoln's London services shows what targeted investment can achieve. Until recently, Lincoln was one of the only English cities with a population over 100,000 without regular direct trains to the capital. Introducing six daily direct services led to a 51% surge in travellers to London, compared to just a 4% rise at many other East Coast Main Line destinations in the same period. London is now Lincoln's foremost, and fastest growing, rail destination[20].

For Lincoln, direct London links are more than convenient; they're essential for growth and opportunity. Sustaining and developing Lincoln-London connectivity is vital as new East Coast Main Line demands emerge. Recent evidence for TfEM shows that for Lincoln, further improving connectivity to London remains its top opportunity for rail to further contribute to Lincoln's economic prosperity[21].



Richie Chan: Shutterstock.com

Keeping Pace

For Lincoln's rail services to keep up with the city's momentum, the recent promises for better rail services mustn't be just initially delivered; they need to become lasting improvements. Local partners may still need to play an active role in the coming years to ensure that the changes are made to stick.

TfEM's ambition is to see Lincoln City's rail services improved further still, such as faster journey times and improved frequencies. It is clear that these can only be achieved by building on the foundation of the service levels in place from December 2025.

Fragile

The planned doubling of services between Lincoln and Nottingham is welcome, but these valuable service commitments could yet be threatened. The uplift coincides with a complex and long-awaited restructure of the timetable on the East Coast Main Line. The concern is that previous major timetable changes have led to subsequent disruption and triggered immediate operational trade-offs, ultimately to scale-back committed plans. If tough decisions have to be made on how the network is performing overall, it could be all too easy for Lincoln's improvements to be vulnerable to cutbacks, such as the decision to cut the direct London Sunday service from December 2025.

There are wider risks too. The cancellation of HS2 to the Midlands and the north could threaten existing services over the longer term, including Lincoln's direct trains to London. This is because the rail industry still has the ambition to improve its long-distance rail services between London and the North; but is now forced to plan these using largely existing congested rail infrastructure. Ambitions to improve long-distance services from London to alternative destinations further north using the East Coast Main Line, could see Lincoln's direct London service made vulnerable to being eroded by a reallocation of the East Coast Main Line's constrained capacity.

Unlike other ECML cities like Bradford, Harrogate, or Middlesbrough, alternative routes to London from Lincoln are unattractive - adding extra time, cost, and complexity. Cutting Lincoln's direct link would be a disproportionate blow to its connectivity, as demonstrated by the alternatives currently available to passengers in Table 1.

Table 1 Existing journey options to Lincoln from London (December 2024 timetable)

Route	Frequency	Time (average)	Distance
Direct service on the ECML to Lincoln via Newark Northgate	Six trains per day	1hr 48 mins	137 miles
Interchange at Newark Northgate	Four pre-1200 and one late evening service	2 hr 03 mins	137 miles
ECML to Newark Northgate, then walk to Newark Castle[1] for service to Lincoln	Hourly	3hr 0mins	138 miles
Interchange at Peterborough for service to Lincoln via GNGE	Hourly	2 hr 15 mins[2]	131 miles
MML London St Pancras service to Nottingham, interchange onto train to Lincoln	Two direct southbound AM services followed by hourly Nottingham-Lincoln[3]	2 hr 42 mins	160 miles

1 Interchange walking allowance of 23 minutes.
2 Journey opportunities not available in every hour.
3 Planned to rise to two trains per hour from December 2025.

Crossed lines

Lincoln needs industry drive towards a bold, long-term solution; one that tackles the real barriers holding rail services back. Chief among these is the Newark Flat Crossing - where the East Coast Main Line crosses the Castle Line at ground level. This outdated piece of infrastructure continues to limit trains on both lines, stifling Lincoln's existing low-frequency links (e.g to Newark Northgate to access the ECML in the hours that the direct London service does not operate), and constraining the potential of future direct services. Relieving the crossing would have resilience benefits that would ripple across the whole ECML to places far afield that are nationally significant. Investing in 'grade separation' (aligning a junction of two or more lines at different heights) at this junction would transform what is possible on the network and enable trains to operate across both lines unimpeded.

Newark Flat Crossing

J.Hannan-Briggs

Full speed ahead

The trains that will operate between Lincoln and Nottingham will be refurbished over the next couple of years. These trains are capable of sustaining up to 100mph speeds where the infrastructure allows; yet stretches of the track are restricted to just 50mph. Boosting the line speeds in these sections between Lincoln and Nottingham is a further long-overdue improvement.

In part, the outdated Signalling has held progress back. Network Rail has already mapped out a plan to increase the speed provision of the Signalling system to 75mph; but delivery has been delayed. The commitment remains to deliver this awaited Signalling renewal this decade within Network Rails current Control Period.

With an additional £18 million investment (a modest sum in rail terms), Midlands Connect has shown some journey times could be cut by up to five minutes, with a benefit-cost ratio up to 2.0[22], reflecting a 'high' value for money. This is an affordable, deliverable scheme that could bring immediate benefits if Network Rail is given the tools to finish the job.

Line speed improvements would offer both the passenger service and existing freight services improved resilience. The measurable benefits that arise from the investment could also now be forecast to increase. This is because both more trains and passengers are to be positively impacted than when the speed benefits were modelled under previous lower-frequency assumptions.

Another key Lincoln inter-urban service that is prime for speed or journey time improvements is the Lincoln - Sheffield link, which averages just 35mph. Some welcome progress was achieved in 2018 through the delivery of an express service, but this was removed during the pandemic with no sign of return. Restoring and improving this connection should be a clear priority.

Class 170 in EMR livery

Unattractive

"Stakeholders do not seek metropolitan frequencies, just hourly trains that inter-connect."

(Modern Railways, 2016, with reference to Lincoln's rail network during the East Midlands Franchise Tender process)

"The new Greater Lincolnshire Combined County Authority is committed to working with the rail industry to improve rail services across the area. For Lincoln, rail services need to be more frequent and attractive to tourists, visitors and businesses alike. Despite promises made nearly ten years ago during the last rail franchise planning - such as better Sunday services - Lincoln's regional rail connections still fall short of providing hourly service every day and lack proper integration across the network."

Dame Andrea Jenkyns DBE, Mayor of Greater Lincolnshire

Despite progress on some corridors, many regional services through Lincoln will remain patchy. The current regional timetable is sparse through Lincoln to places such as Peterborough, Sleaford, Doncaster or Grimsby, and is not yet in any industry plan to be enhanced to hourly all day - every day. Until it is, it's tough for people to see rail as a real alternative to driving.

Reliability on these lines, although exhibiting amongst some of the stronger metrics for local routes, is also a challenge when set against what customers should expect from their transport fare. Punctuality on lines in the East Midlands is weaker than the experiences enjoyed on rail in most other English regions, compounding the challenge to passengers posed by the infrequent service timetables, and undermining confidence in rail to its prospective passengers.

Some frequency improvements for these regional links were committed to as part of the last East Midlands franchise in 2019, such as to Sunday services, but these plans have not progressed. Other than the welcomed Nottingham improvements, there is no delivery plan for bringing Lincoln's wider regional rail links up to even these modest service level aspirations, which are seen as a minimum for rail to be more consistently viewed as an attractive choice.

A New Agenda

But there's hope for change. In the next few years, new organisations such as the Greater Lincolnshire Combined County Authority (GLCCA), and Great British Railways (GBR), and new collaborative frameworks for joined-up thinking on the railways, will all potentially bring a fresh approach.

In the coming years, Lincoln's case should consistently be heard at the highest level. The local plan for rail should be more tangible and integrated with interfacing national programmes, meaning integrated plans for the future, targeting: longer trains, traction decarbonisation and improved accessibility - such as renewal of the current Lincoln station platform footbridge, which is overdue for modernisation.

Also, new enthusiasm in planning 'beyond the horizon', such as enhancing the direct London service (including extending these trains to Cleethorpes), restoring Lincoln's direct links with Birmingham, and even creating new connections to York and Cambridge could all be properly reviewed by GBR hand-in-hand with the Local Authorities.

A Shared Vision for Lincoln and the East Midlands

Transport for the East Midlands and the Greater Lincolnshire Combined County Authority have a shared vision that sees better connecting Lincoln City as a priority for the East Midlands transport network and the East Midlands economy.

Lincoln has changed and now stands as a dynamic and even more regionally important city, and it should be well-connected for economic links - not just with Nottingham and London, but with more surrounding regional hubs. After years of watching other cities move ahead, Lincoln's time has come to be prioritised for rail improvement.

The upgrades coming in December 2025 are a welcome example of what's possible when 'can-do' thinking by industry drives real change, also reflecting the tireless advocacy of Councils and local partners. But this must be just the beginning. These gains cannot be allowed to slip away - they need to be protected and serve as the foundation for future improvements.

Strong local organisations will be around the table with newly integrated industry decision makers as they make early strides to ensure this year is just the first chapter. Authorities will use new devolved arrangements to lead on advocating for rail improvements to Lincoln, whilst still leveraging strong collaboration across the whole East Midlands region.

We're making sure Lincoln's case is amplified. To **keep pace** with Lincoln's growth, it now needs further investment in infrastructure and rolling stock: faster lines, longer trains, and more frequent services, to make the railway a true match for the city it serves.

Endnotes

1 Lincoln City Profile – City of Lincoln Council

2 https://www.ons.gov.uk/visualisations/censusareachanges/E07000138/

3 https://www.lincoln.gov.uk/council/lincoln-city-profile

4 Lincoln Transport Strategy 2020-2036

5 https://www.ons.gov.uk/census/maps/choropleth/housing/number-of-cars-or-vans/number-of-cars-3a/no-cars-or-vans-in-household

6 https://www.lincoln.gov.uk/downloads/file/1984/vision-2030

7 Office for National Statistics, 2021 (GDP) and 2017 (GVA)

8 Social Mobility Index, 2023, https://social-mobility.data.gov.uk/

9 Midlands Connect, A46 Corridor Study, 2020

10 https://www.emcouncils.gov.uk/wp-content/uploads/2024/04/TfEM-Shared-Vision-2024.pdf

11 https://www.lincolnshire.gov.uk/downloads/file/7200/local-transport-plan-5

12 Midlands Connect, 2025, 'The Castle Line: Connecting Commuters between Nottingham, Newark and Lincoln'

13 https://www.emcouncils.gov.uk/official-statistics-show-10-8-billion-funding-deficit-in-east-midlands/

14 Examples across: Lincoln<>Newark North Gate reductions, Sheffield<>Gainsborough Central - withdrawn, Sheffield<>Cleethorpes via Brigg route: Now only Saturday, SHF<>LCN reductions

15 Data extracted from the September 2025 Wednesday service pattern using National Rail Enquiries and Realtime Trains (including impact of current Transpennine Route Upgrade works). Services to/from Worcester include Worcestershire Parkway.

16 ORR station usage data, 2019/20 and 2023/24 (https://dataportal.orr.gov.uk/statistics/usage/estimates-of-station-usage)

17 https://www.emcouncils.gov.uk/wp-content/uploads/2023/12/EM_Rail_and_Growth_Study.pdf

18 TEMPro estimates the growth in leisure-related rail trips in Lincoln to be up to 5% over the next 10 years.

19 East Midlands Railway estimate the economic benefit of the improvements to be £2.4 million per annum.

20 Source: ORR Origin-Destination Matrix 2018/19 and 2023/24

21 SYSTRA city connectivity modelling with Miranda 2025 for TfEM

22 Midlands Connect, 2023, Nottingham-Lincoln Strategic Outline Business Case

Transport for the East Midlands

East Midlands Councils

ROUTES TO PROSPERITY – TRANSPORT AND THE ECONOMY IN THE EAST MIDLANDS - WORKING DRAFT

Transport for the East Midlands

SYSTRA

WORKING DRAFT

CONTENTS

1. INTRODUCTION

1.1 Who is Transport for the East Midlands?

Transport for the East Midlands (TfEM), supported by East Midlands Councils (EMC), is made up of the ten local transport authorities across the East Midlands. The TfEM terms of reference are:

- To provide collective leadership on strategic transport issues for the East Midlands.
- To develop and agree strategic transport investment priorities.
- To provide collective East Midlands input into Midlands Connect (and other relevant sub-national bodies), the Department for Transport and its delivery bodies, and the work of the National Infrastructure Commission.
- To monitor the delivery of strategic transport investment within the East Midlands, and to highlight any concerns to the relevant delivery bodies, the Department for Transport and, where necessary, the EMC Executive Board.
- To provide regular activity updates to leaders through the EMC Executive Board.

TfEM is chaired by Sir Peter Soulsby, Mayor of Leicester, and comprises elected members nominated by its constituent authorities.

1.2 Recent history

Transport in the East Midlands, like much of the UK, has undergone significant change in the last 30 or so years. Rail privatisation in the mid-90s led to the emergence of distinct operators for the region such as East Midlands Railway CrossCountry and, following national trends, rail passenger traffic experienced significant rises into the 2000s and 2010s, influenced by a strong economy and increased road congestion in towns and cities.

In that time there have also been some successes in terms of rail investment. Both Nottingham and Derby stations have benefited from major schemes to improve capacity and operation, whilst Midland Mainline electrification, although only partially delivered between 2015 and 2024, has delivered some benefits.

East Midlands Airport, now the second-busiest UK airport for freight traffic, is part of a major freight hub in the region, incorporating the rail-served East Midlands Gateway. East Midlands Parkway station was opened in 2009, and the freight hub is now an established Freeport and continues to attract investment.

The road network has also undergone changes. Investment in strategic corridors has been significant, particularly the M1, A1, A46 and A52, and more local schemes such as the Lincoln eastern bypass and the A453 Nottingham-M1 link have delivered better connectivity for residents to employment and have unlocked development.

The Nottingham Express Transit, the city's tram network, first opened in 2004 with expansions in 2015 doubling the size of the network. The latter investment was part-funded by the city's workplace parking levy, and has been a successful example of locally generated revenue levering in greater central government investment to the benefit of local public transport journeys.

The region has also been impacted by the truncation of HS2. Initially to be delivered through a new station at Toton on a route through to Leeds, and then via direct High Speed services between Birmingham and Nottingham as part of the Integrated Rail Plan, it has left a sizeable gap in committed major rail schemes for the East Midlands. Midland Mainline electrification meanwhile has been paused in the Comprehensive Spending Review.

In 2015, Midlands Connect, the sub-national transport body for the Midlands, was established as part of a nationwide trend to devolve strategic transport policy-making and leadership to the regions. It aims to bring together into one voice a range of partners to drive investment in the region's transport priorities, and has been successful in securing funding towards projects such as Midlands Rail Hub and North Hykeham Relief Road. However, the position of the sub-national transport bodies, including Midlands Connect, is under threat after the Department for Transport's decision to withdraw their funding from 2026.

This decision has been partly brought about by the move in England to devolve transport funding and decisions to mayoral combined authorities. In the East

Midlands context, Combined County Authorities covering Greater Lincolnshire and the authorities in Derbyshire and Nottinghamshire have already been set-up. The other areas of the region are at various stages along the devolution journey. The English Devolution and Community Empowerment Bill, which at the time of writing is currently making its way through the UK parliament, will establish a new framework for the devolution of powers, potentially instigating an acceleration of the process in these remaining areas.

1.3 About this document

This document serves as a core ‘anchor’ document, collating data across demographic, economic and connectivity indicators for the East Midlands region (and its sub-regions within)[1]. Its aim is to identify the challenges and opportunities for the region, and provide the evidence to make the case for investment in transport connectivity to enhance the region’s economic performance and prosperity. As noted in the TfEM & Midlands Connect Shared Vision for the East Midlands:

> “The East Midlands has a strong track record in delivering high levels of housing and employment growth in the national interest. But with better connectivity we could do so much more.”

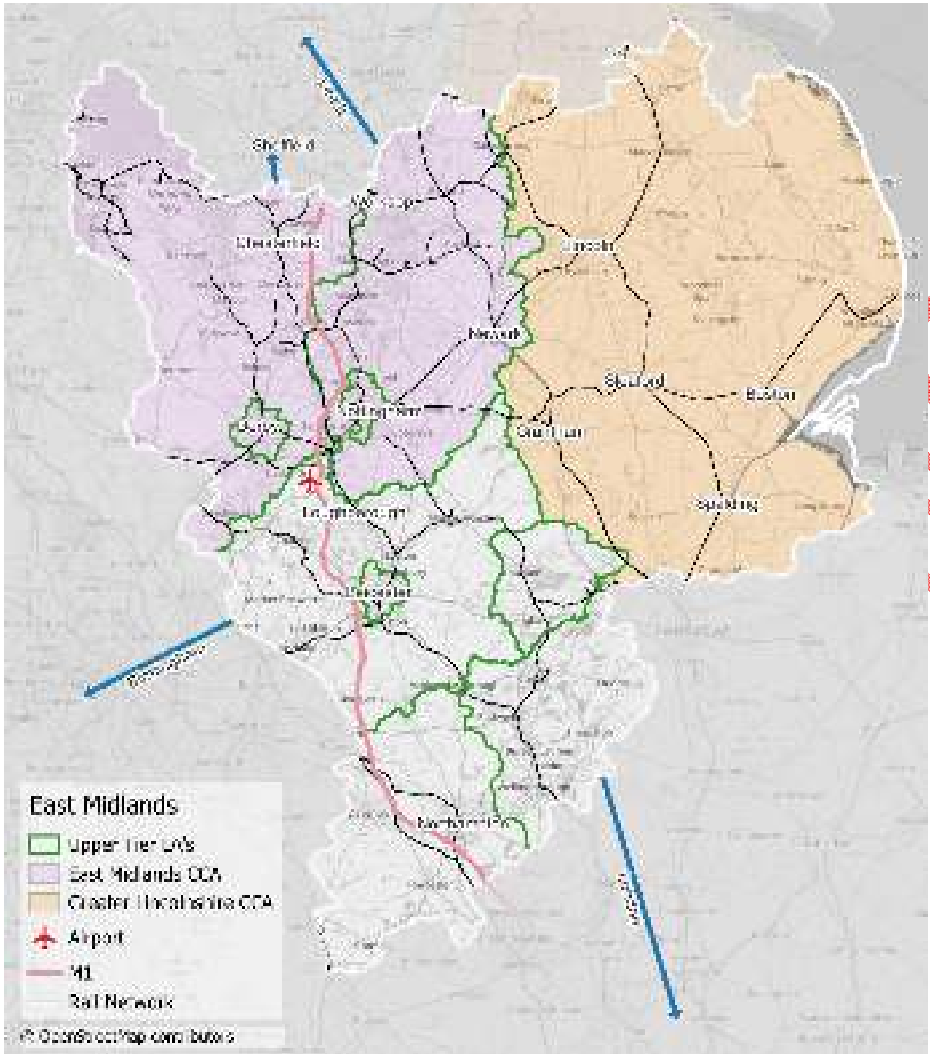
The structure of the document continues as follows:

- The East Midlands – an overall profile of the region and its people.
- The spatial economy – the region’s key economic indicators, industries and trends.
- Transport and connectivity – the transport network of the region, and how people and businesses move around.
- Inside the East Midlands – a deeper dive into the sub-regional profiles.
- Key themes and insights – xxx
- Conclusions - xxx

[1] When considering the presentation of data in this document at a local authority level or lower, it is important to note that the local government reorganisation in 2021 abolished Northamptonshire County Council and its seven district councils, and created two new unitary authorities, North Northamptonshire and West Northamptonshire Councils. Therefore, much of the data prior to 2021 is only available at a Northamptonshire-wide level and, where possible, has been presented as such, combining data for North and West Northamptonshire from 2021 onwards. In some datasets, it has not been possible to combine the data, and therefore the different incarnations of the local government structure have been presented separately.

2. THE EAST MIDLANDS

2.1 Overview



The East Midlands is diverse; in its geography, its economy, its population and its transport network. The large rural areas of the Peak District National Park in the north-west of the region, across to the Lincolnshire Wolds and Lincolnshire Coast in the east, contrast with the polycentric nature of its urban areas. Nottingham, Derby, Leicester and Lincoln are its cities, with the former three being its most populous urban centres, alongside a number of market

and commuter towns such as Northampton, Mansfield, Boston and Loughborough.

The East Midland is strategically located in the centre of the country, with two of the UK's primary transport corridors, the M1 motorway and the East Coast Mainline, running through its heart. East Midlands Airport, as well as the emerging East Midlands Gateway and Freeport, are situated between Derby, Leicester and Nottingham.

The region is the fourth largest English region, behind the South West, East and South East, covering 12% of England and 6% of the UK.

As noted previously, the region currently has two Combined County Authorities with elected mayors, as follows:

- East Midlands Combined County Authority – created in 2024 as the UK's first combined county authority, comprising the four local authorities of Derby, Derbyshire, Nottingham, Nottinghamshire.
- Greater Lincolnshire Combined County Authority – created in 2025, comprising the local authority of Lincolnshire in the East Midlands, plus North East Lincolnshire and North Lincolnshire in Yorkshire and the Humber.

The other areas of the region are at various stages along the devolution journey. The councils of Leicester, Leicestershire and Rutland agreed in 2023 to enter into negotiations for a non-mayoral deal, which have yet to conclude. The two unitary authorities of North and West Northamptonshire also do not currently have a devolution settlement. As an alternative to a future deal between the two East Midlands authorities, there has been a potential option mooted to include the neighbouring authorities of Bedford, Central Bedfordshire, Luton and Milton Keynes within a wider 'South East Midlands' combined authority.

Overview statistics	
Population (2023)	4.9m (7.1% of UK population)
Urban/rural split[2]	77% urban, 23% rural
Ethnic composition (2021)	White (all groups) – 83% Asian/Asian British – 8% Black/African/Caribbean/Black British – 3% Mixed/multiple groups – 4% Other ethnic groups – 2%
Employment rate (Q1 2024)	76.2%
Unemployment rate (Q1 2024)	3.8%
Median gross weekly pay (2023)	£630

LOCAL TRANSPORT POLICY

Given the uneven progress of the devolution process across the region, the local transport policy context is a mixture of emerging Local Transport Plans (LTPs) at a Combined County Authority level and adopted LTPs from the local highway authorities. Based on a review of the plans and policies available, the themes and priorities common across all were:

- Generating improved economic opportunities through transport investment
- Improving the connectivity across and between communities
- Protecting the environment
- Supporting the development of healthy lifestyles and places

[2] Defined by the Department for Environment, Food & Rural Affairs rural-urban classifications and the 2021 Census.

Table 1. Local transport policy summary

Authority transport plan	Vision	Themes	Notable strategic schemes/priorities
East Midlands LTP (emerging)	By 2040, communities in the East Midlands will benefit from reliable, inclusive and sustainable connectivity, through integrated transport and high-quality digital infrastructure, broadening access to opportunity and reducing reliance on private cars, while driving investment across the region.	• Increase modal choice • Better connect communities • Create better economic opportunity • Protect our environment	• Trent Arc - urban network linking Derby, Nottingham, the Freeport and Infinity Investment Zone • Canal Corridors - connecting growth around Chesterfield station and Investment Zone sites to the Supercluster • Supercluster - development of three former coal-fired power stations
Greater Lincolnshire LTP (emerging)	Supporting the creation of a sustainable transport system that will connect communities to create good lives, with independence, wealth and good health.		• Rural bus pilot - demand responsive transport • Rail infrastructure and services, including line speed improvements between Cleethorpes and Doncaster, Lincoln and Nottingham, and more direct links to major cities. • Development of a Key Route Network, and investment in key routes such as A1, Grimsby Western Relief Road, and A46 Newark Bypass • Implementation of multi-modal freight strategies
Leicester City Council LTP (draft)	The transport vision for Leicester is for a carbon neutral, growing, healthy, accessible and connected city, with clean air supporting a high quality of life and travel experience for people and a vibrant local economy.	• Connected corridors and hubs • Connected healthy neighbourhoods • Managing demand for car use	• Transformed Leicester station • Workplace parking levy • New P&R sites
Leicestershire County Council LTP4 (adopted)	Delivering a safe, connected and integrated transport network which is resilient and well managed to support the ambitions and health of our growing communities, safeguards the environment whilst delivering economic prosperity.	• Enabling Health and Wellbeing • Protecting the Environment • Delivering Economic Growth • Enhancing our Transport Networks Resilience • Embracing Innovation	

Rutland County Council LTP4 (adopted)	A transport network and services that support sustainable growth, meet the needs of our most vulnerable residents and help improve health and wellbeing.	o Population growth o Working in Rutland o Learning in Rutland o Living in Rutland o Visiting and enjoying Rutland	o Highway network management plan o Reducing car dependency o Reducing deaths and injuries on local roads
North Northamptonshire LTP (emerging)	None currently identified, draft Baseline Report drafted and final version being prepared.		
West Northamptonshire LTP (adopted)	West Northamptonshire has moved rapidly to achieve a net zero emissions transport system by 2045. Working together with our communities we have made travel by active modes like walking and cycling the natural first choice for short trips, travel by public transport has become increasingly attractive and accessible, and communities are less dependent on private cars. Our transport system is both safer and cleaner, benefitting our health and the environment, and supporting the access needs of everyone in our community to foster social inclusion and wellbeing. More resilient infrastructure and services increase opportunities for people to live their best lives by facilitating vibrant town and local centres, and a thriving local economy.	o Connecting people better o Shaping healthier places o Mobility enabling prosperity	o New Rugby Parkway station o New stations at South Northampton and Weedon Bec/Daventry o New rail service between Northampton and Old Oak Common o Improved Northampton loop services o Extended East-West Rail services to Northampton o Weedon Fast Line freight loops A43 dualling o A5 Towcester relief road

2.2 Demographics

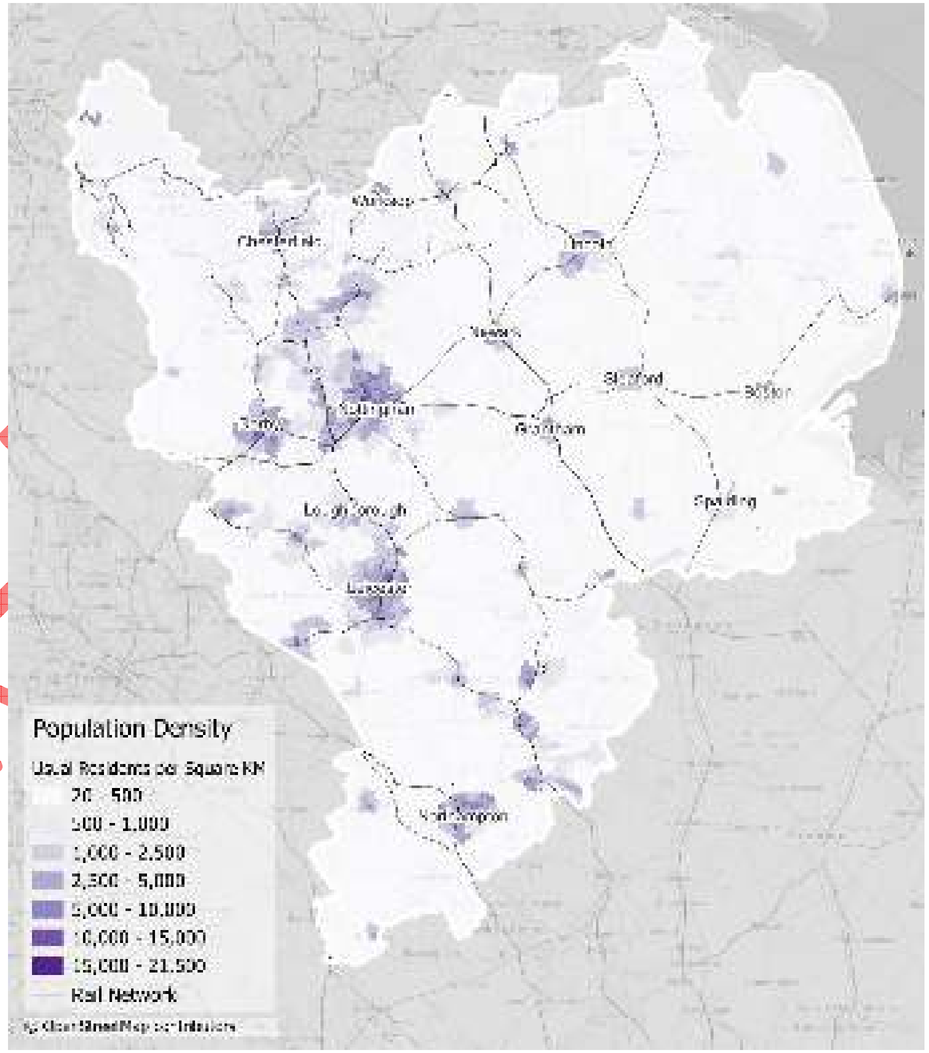
POPULATION DENSITY

The East Midlands as a region has a lower population density (measured by usual residents per square kilometre) than England – 312 residents compared to 434, equivalent to 72% of the England average.

At a local authority level, the densest populations are around the urban centres of Derby, Nottingham, Lincoln, Leicester and Northampton, as well as the A52 corridor between Derby and Nottingham, and towards Chesterfield and Mansfield, in close proximity to the M1 and ECML corridors.

Other pockets of population density include Skegness on the Lincolnshire Coast, a few locations around Loughborough and Coalville, and the closely clustered Northamptonshire towns of Corby, Kettering and Wellingborough.

> Compared to the national average, population density in the East Midlands is over a quarter lower. The region's population is primarily focused around the urban centres in Derby, Nottingham and Leicester, along with the wider M1 corridor.



POPULATION GROWTH

Over the last 20 or so years, population growth has been mostly in the south and west of the region, particularly in the local authorities of South Derbyshire, Leicester and Harborough, where the growth has been as much as a third since 2004. The Northamptonshires, Boston, Charnwood, North Kesteven and Lincoln have also seen population growth in excess of one fifth.

By contrast, the more rural authorities such as High Peak, Derbyshire Dales and Erewash have grown by less than 5% above 2004 levels. East Lindsey, making up much of rural Lincolnshire, has grown by just 8%. Chesterfield is perhaps the outlier, being a relatively urban district but with population growth of only 5% since 2004.

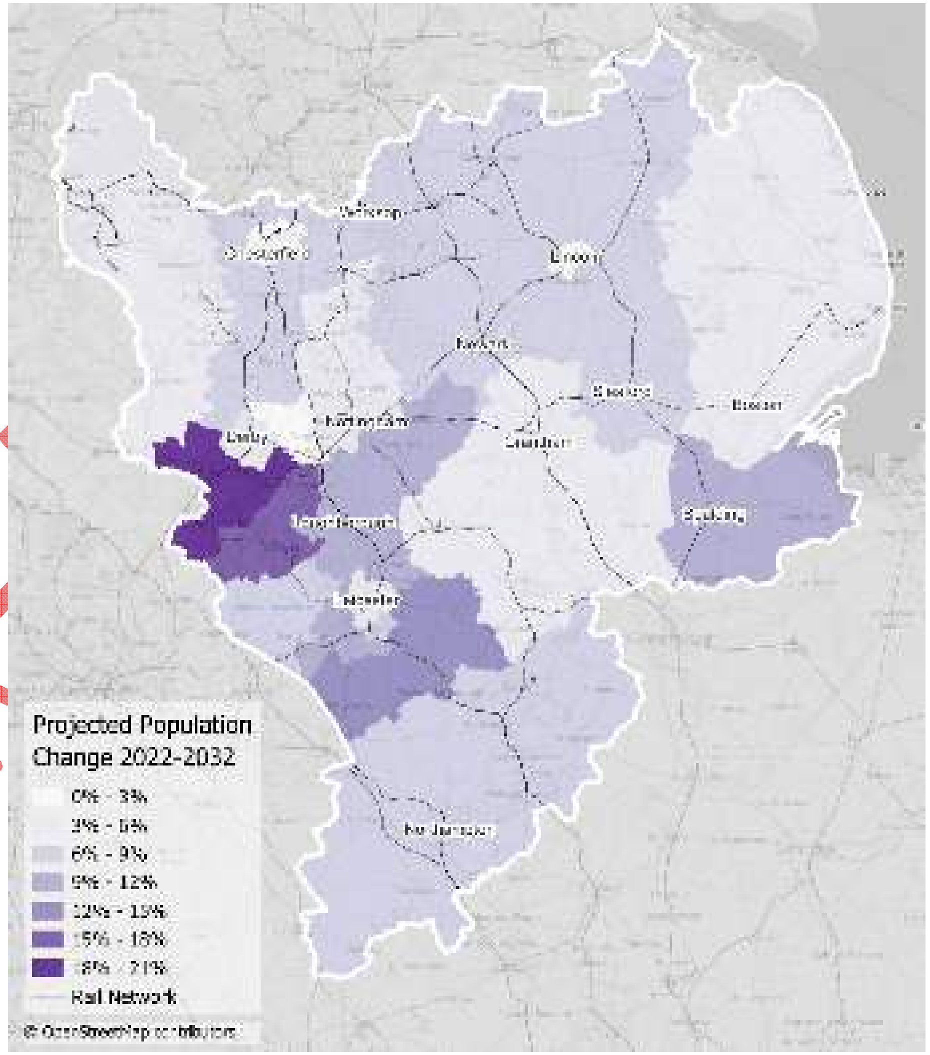
The population projections to 2032, released in 2025 by the Office for National Statistics, estimate that the East Midlands will increase on average by just under 6.9%. This is slightly more than the national average of 6.4%

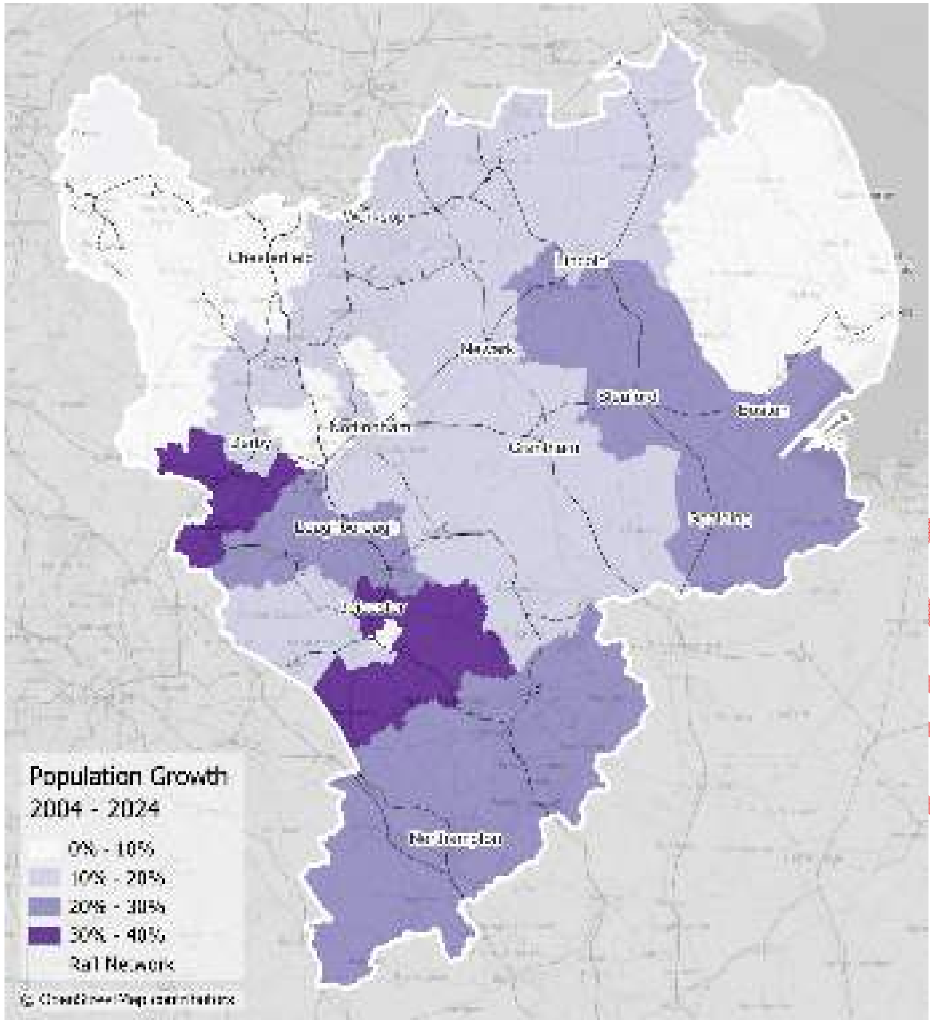
South Derbyshire, North West Leicestershire and Harborough will have the most significant population growth of between 15% and 20%. Indeed, South Derbyshire and North West Leicestershire are both amongst the top five local authorities in the country by percentage population change, with South Derbyshire only behind City of London and Tower Hamlets. By contrast, Erewash, Lincoln and Chesterfield have the lowest projected increases in the region, of below 3%.

Historic population growth has been clustered around the urban centres in the south and west of the region. The rural areas of Lincolnshire and the Peak District have grown at a much slower rate, some by as little as 3% over 20 years.

Population projections to 2032 follow a similar geographical pattern, with the areas immediately outside the urban centres of Leicester, Derby and Nottingham experiencing the largest projected increases. South Derbyshire is in the top three local authorities in the country for projected population growth, behind two Greater London districts.

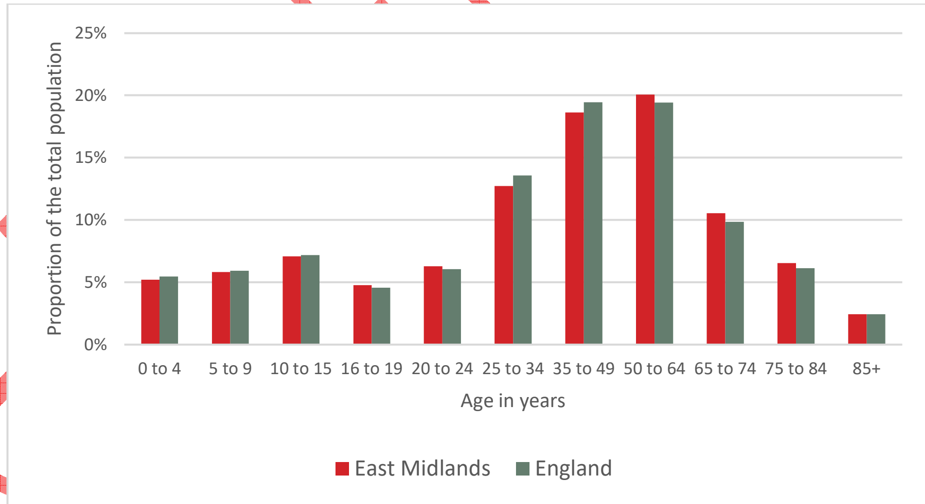
These patterns, both historic and projected, potentially suggest an overall movement out of urban centres into more suburban or semi-rural areas.





POPULATION AGE

The proportion of the population at working age in the East Midlands is 62.4%, slightly below that of England at 63%. This gap in the working age population is seen in the 25-49 age group, with those aged between 16 and 24 slightly above the national average.

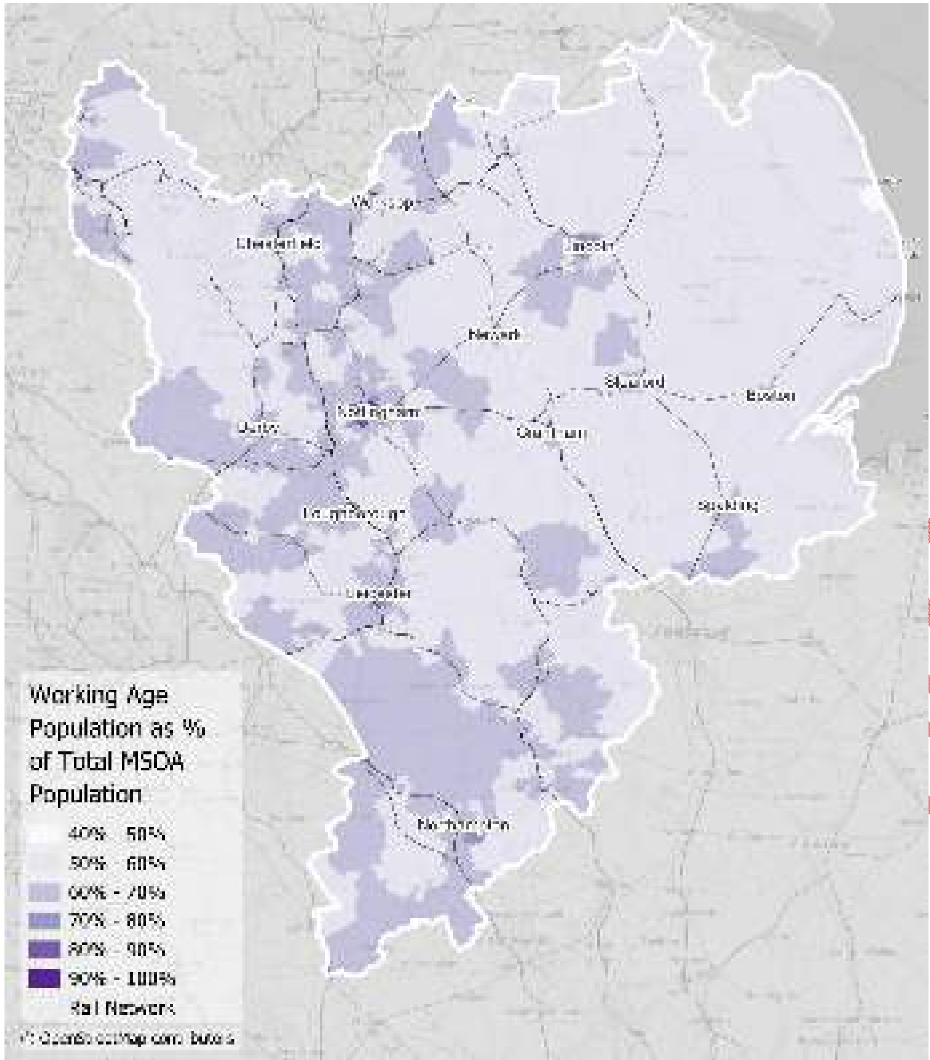


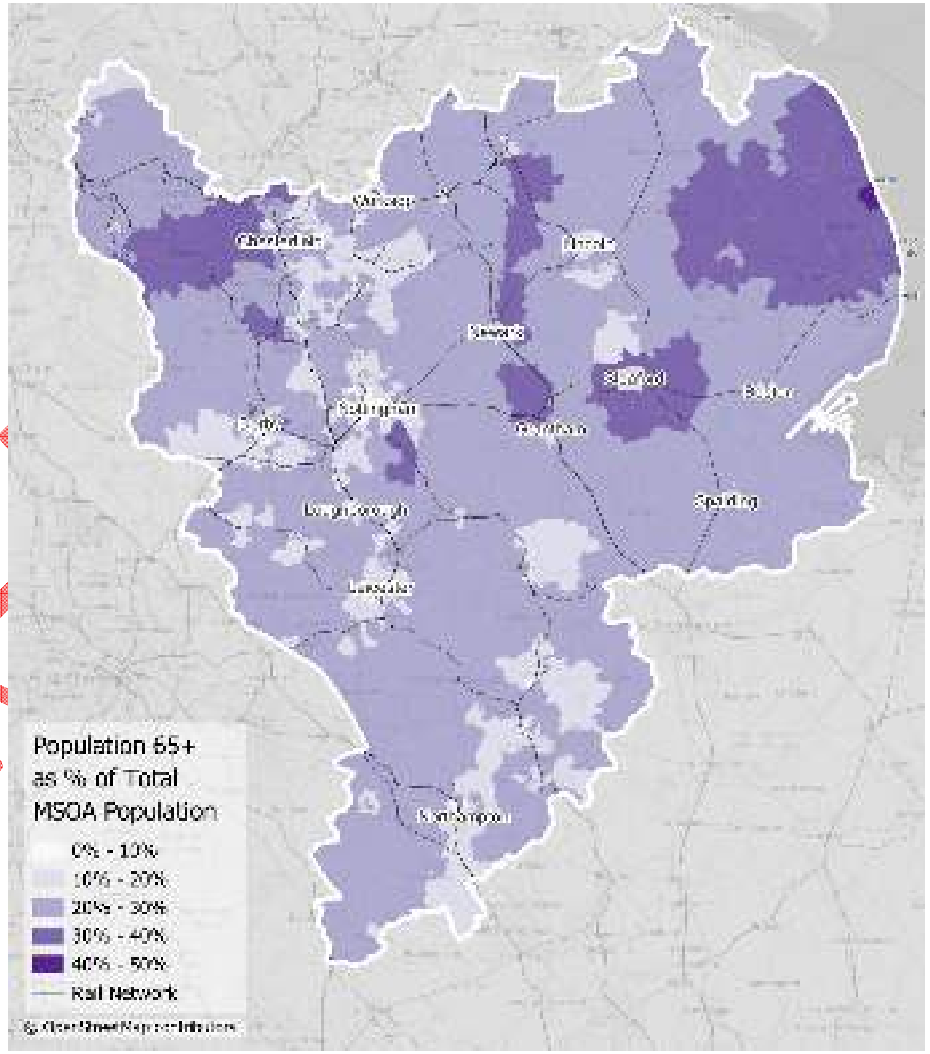
The highest concentrations of working age people can be found close to the urban centres, particularly Nottingham (70%) and Leicester (67%), with more people aged 65 and over around the Lincolnshire coast and rural Lincolnshire (23%), and in the Peak District (High Peak – 22%).

In terms of the location of the future workforce, the highest proportions of people aged 15 and under are in Leicester (21%), Derby and North Northamptonshire (both 20%).

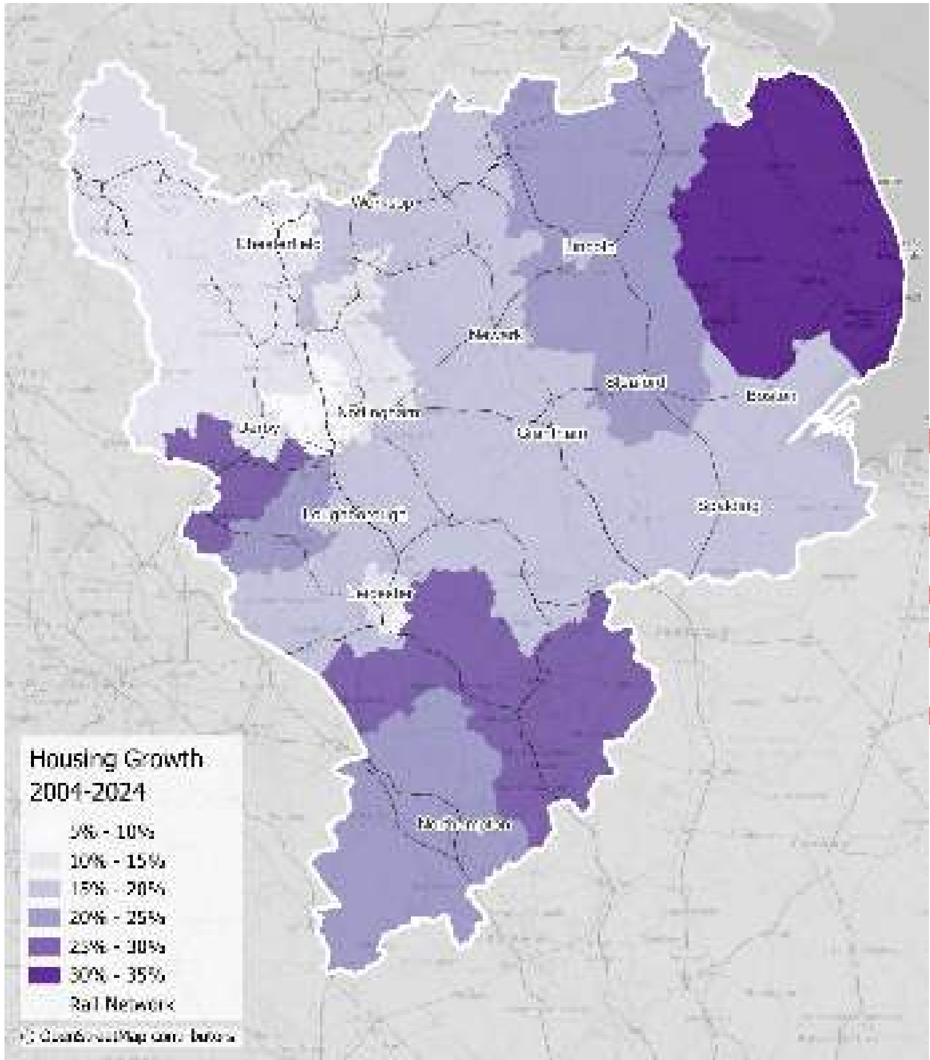
The East Midlands population is slightly older than the national average, although it has a larger than average population between the ages of 16 and 24 years old.

The working age population is most highly concentrated in Nottingham and Leicester, whilst the region's rural areas (such as Lincolnshire and parts of Derbyshire) are generally older.


Working Age Population as % of Total MSOA Population
40% - 50%
50% - 60%
60% - 70%
70% - 80%
80% - 90%
90% - 100%
Rail Network


Population 65+ as % of Total MSOA Population
0% - 10%
10% - 20%
20% - 30%
30% - 40%
40% - 50%
Rail Network

Housing



Over the last 20 years, housing growth in the region has been proportionally greatest in South Derbyshire, North West Leicestershire, Northamptonshire and the Lincolnshire Coast, which have all grown by over a fifth over the last two decades. The lowest percentage growth in the region is in Chesterfield, Erewash and Oadby and Wigston, all of which have grown by less than 10%.

Housing growth broadly matches the pattern of population growth over the last 20 years, with common areas including South Derbyshire, North West Leicestershire and Northamptonshire. The exception to this is on the Lincolnshire Coast – the population in East Lindsey, which covers much of the Lincolnshire coastline as well as some market towns inland, has grown by just 8% over two decades, whilst housing has grown nearly one third.

In comparing housing growth to the population projections, it is notable that East Lindsey is only projected to grow by 6% to 2032, whilst areas such as South Derbyshire and North West Leicestershire (with historically strong housing growth) have more buoyant population growth estimates of 15-20%.

DEPRIVATION

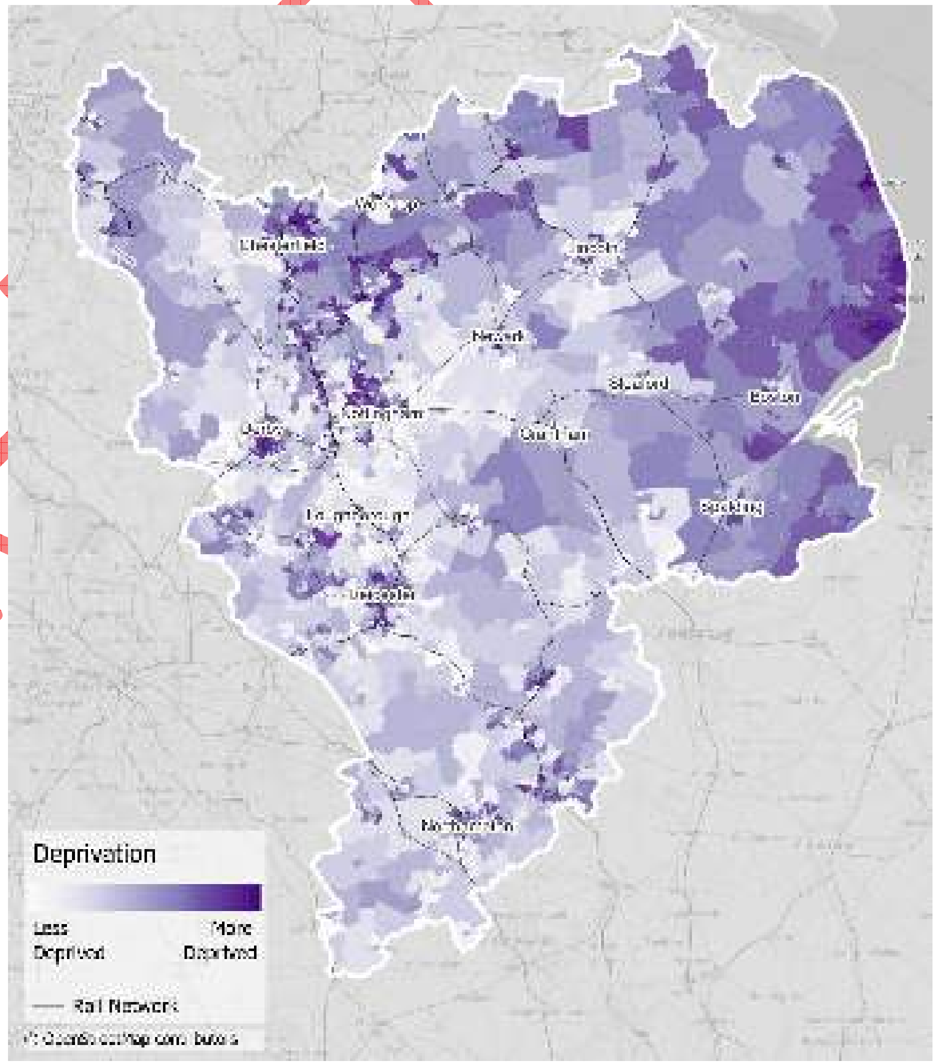
At a regional level, the East Midlands has a greater proportion of its population in the 10% most deprived deciles in the country than the national average in two domains (and two sub-domains) of deprivation:

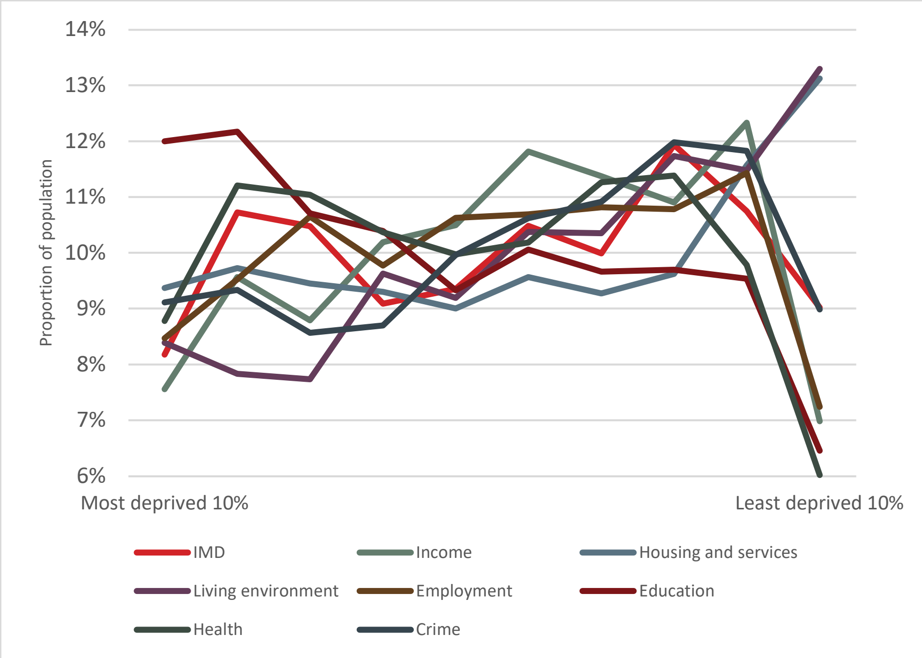
- **Education, skills and training** – 12% of its population. Measures the lack of attainment and skills in the local population. Within this domain, there are two sub-domains where the region had a relatively high proportion of the population in the most deprived decile:
  - **Children and young people** – 10%. Incorporates attainment, entry to higher education, and pupil absence.
  - **Adult skills** – 10%. Incorporates qualifications and the ability to speak English.
- **Geographical barriers** (within the housing and services domain) – 14%. Includes a connectivity score, measuring travel time to retail, education, health, employment and leisure/entertainment destinations by walking, cycling and public transport.

In terms of the 10% least deprived deciles in the country, the region has the greatest proportion of the population in these deciles in two domains (and two sub-domains):

- **Barriers to housing and services** – 13%. Measures the physical and financial accessibility of housing and local services. Within this domain, there is one sub-domain where the region has a relatively high proportion of the population in the least deprived decile:
  - **Wider barriers** – 26%. Incorporates housing affordability, household overcrowding, homelessness, broadband speed and patient-to-GP ratio.
- **Living environment** – 13%. Measures the quality of the local environment. Within this domain, there is one sub-domain where the region had a relatively high proportion of the population in the least deprived decile:
  - **Indoors** – 15%. Incorporates the conditions, energy performance and private outdoor space of housing.

At a local authority level, for the overall index of multiple deprivation, Nottingham (28%), Derby (22%) and Leicester (20%) have the largest proportions of their population in the most deprived decile in the country. At the other end of the scale, the districts of Rushcliffe (41%), Broxtowe (both in Nottinghamshire, 25%) and Harborough (in Leicestershire, 23%) have the largest proportions of their population in the least deprived decile.





Compared to national averages, the East Midlands is more deprived in the domain of education, skills and training, and the sub-domain of geographical barriers, the latter incorporating a transport connectivity score to key destinations.

The region has relatively more of its population in the least deprived deciles for barriers to housing and services (despite skewing towards more deprived in the geographical barriers sub-domain) and the living environment (with indoor conditions in particular skewing towards least deprived).

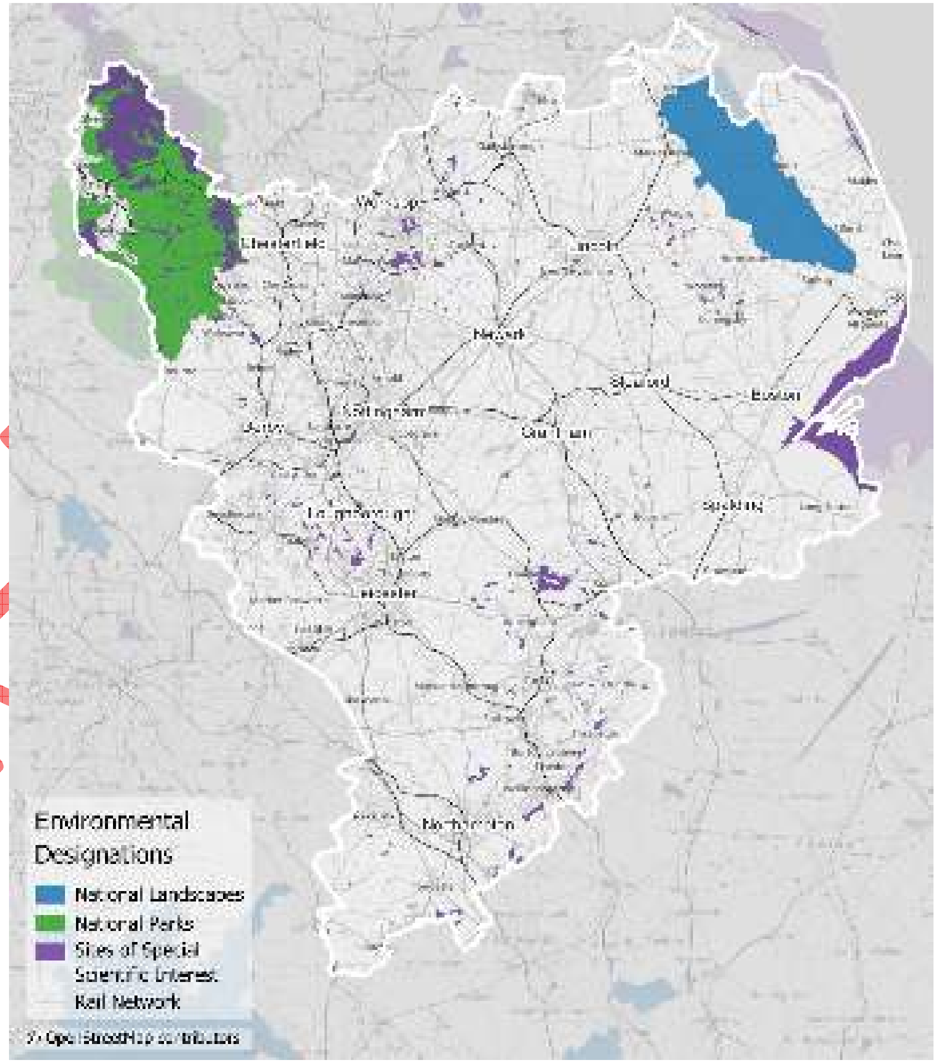
The urban centres of Nottingham, Derby and Leicester tend towards greater deprivation, particularly in the domains of education, skills and training; income; and crime.

2.4 The environment

ENVIRONMENTAL DESIGNATIONS

The East Midland features a number of environmental designations and protected landscapes. These include the Peak District National Park in the north-west of the region, which also includes a number of sites of special scientific interest (SSSIs). There are also clusters of SSSIs on the Lincolnshire Coast, rural Nottinghamshire, The Wash, and around Rutland Water.

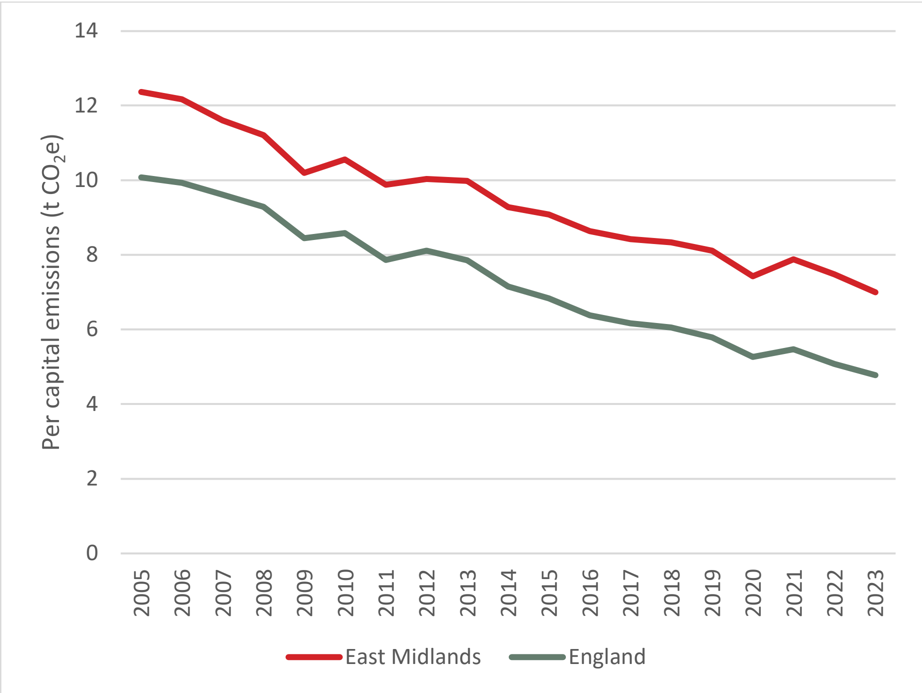
The Lincolnshire Wolds is a designated National Landscape (formerly known as an Area of Outstanding Natural Beauty).

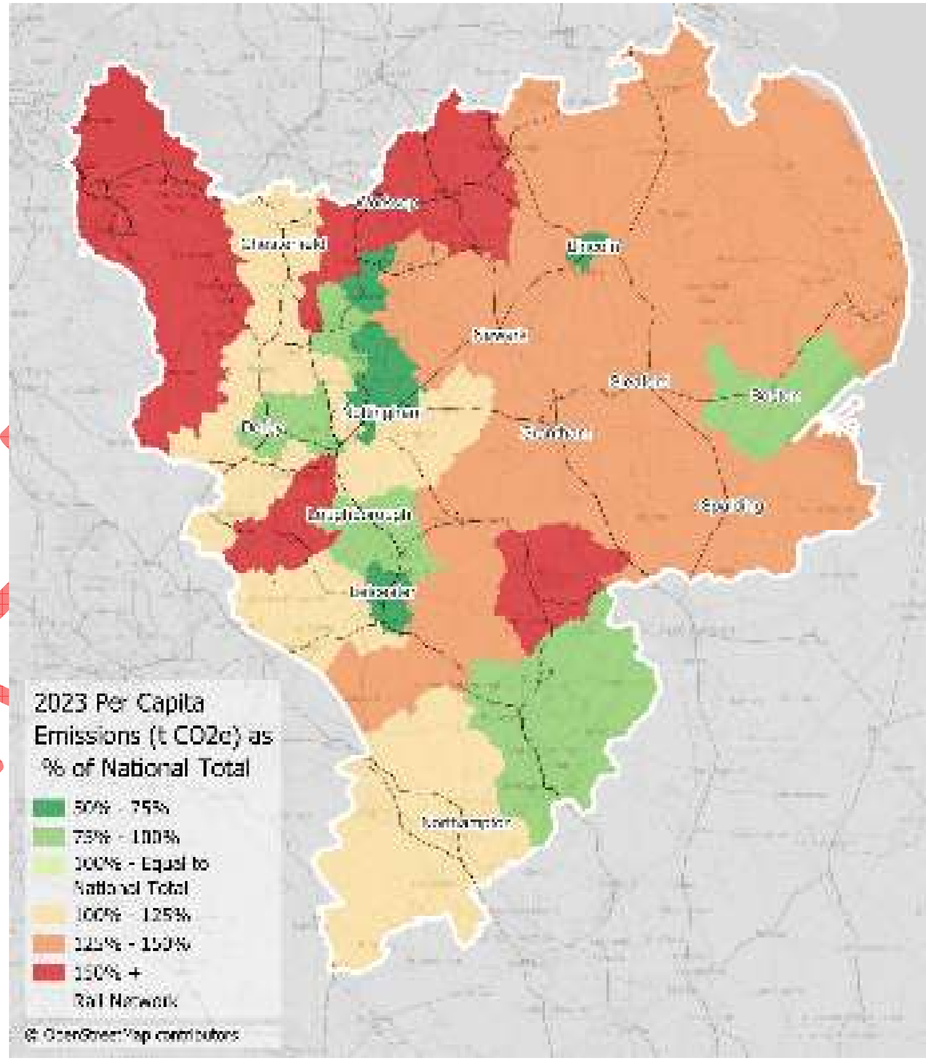


GREENHOUSE GAS EMISSIONS

On a per capita basis, the East Midlands has continually tracked above the national average for greenhouse gas emissions. The gap narrowed between 2005 and 2009, before gradually widening up until 2021. Since 2021, the gap has slightly narrowed again but remains over two tonnes of CO_2e per capita greater, 117% of the national average.

In terms of the distribution across the region, the cities of Derby, Leicester and Nottingham emit on a per capita basis around three-quarters to two-thirds of the national average. As might be expected given the larger distances and more fragmented transport network in rural areas, the parts of the region with the highest per capita emissions are in High Peak, Rutland, Bolsover, the Derbyshire Dales, and parts of rural Lincolnshire.





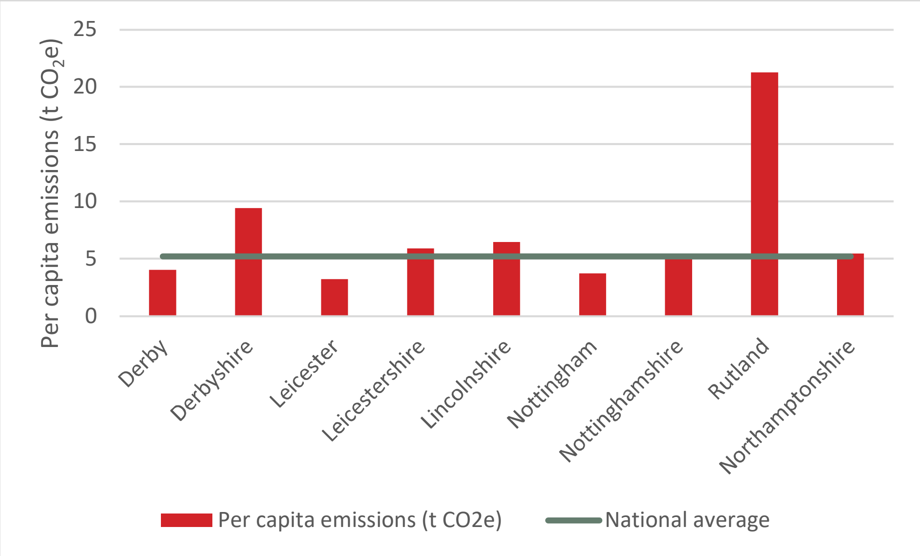
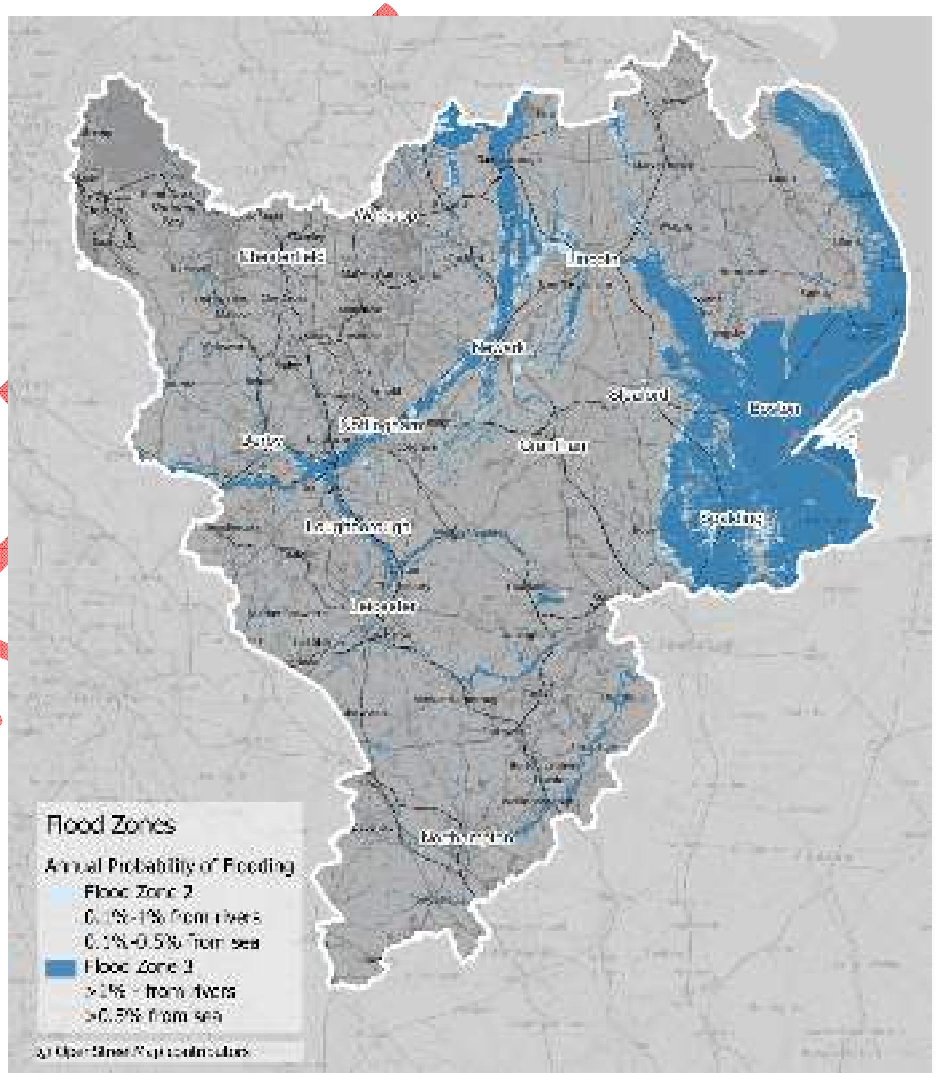


Figure 1. Per capita emissions (2023) (t CO_2e)

At a regional level, the East Midlands produces more CO_2 emissions per capita than the national average, although this gap has been narrowing slightly since 2021. The parts of the region with the highest per capita emissions are in its rural areas, such as Derbyshire, Rutland and Lincolnshire. The region's cities emit less than the national average per capita.

FLOOD ZONES



[Commentary on data e.g. x% of the East Midlands is within 'Flood Zone 2' for fluvial and coastal flooding, with xx properties and xxx people living in flood risk areas. Analysis on this in progress, data is challenging to handle.]

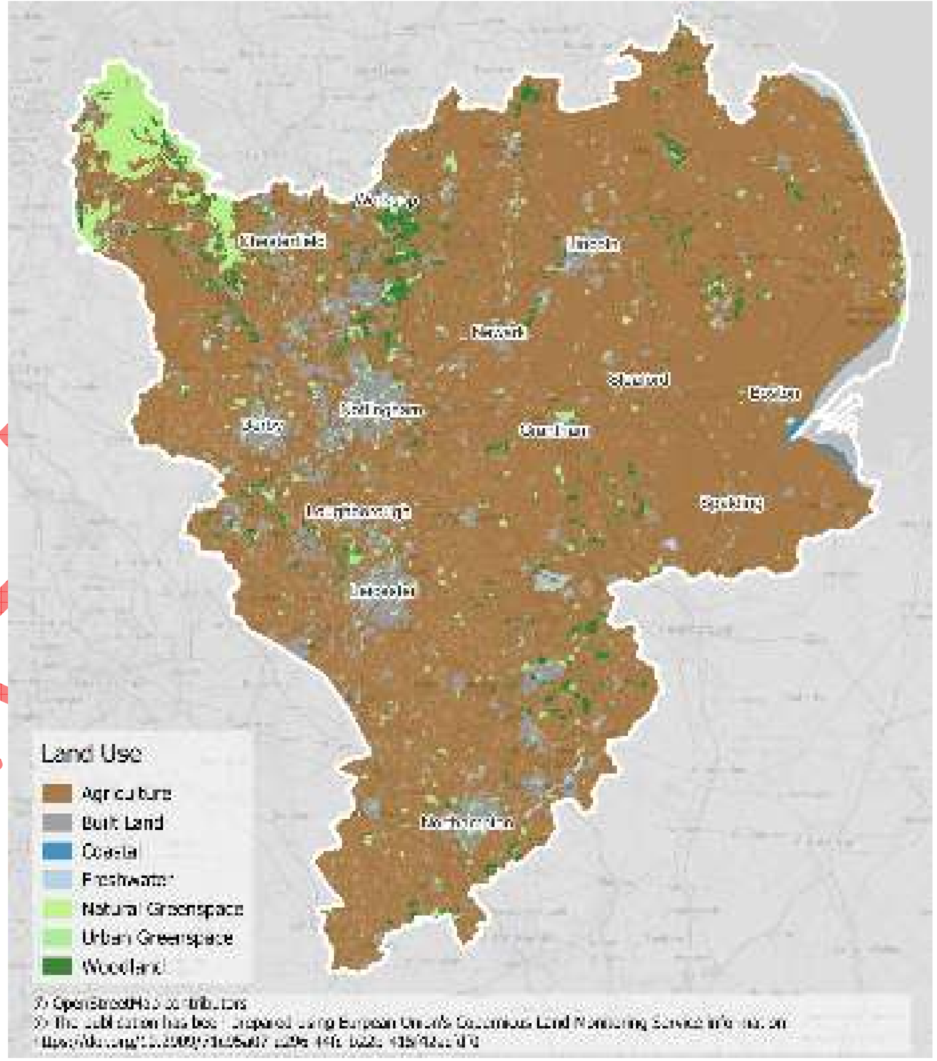
LAND USE

The East Midlands is primarily made up of agricultural land (over 80%), with the remaining fifth primarily built land, woodland and natural greenspace.

Table 2. Regional land use proportions

Land use category	% of total land
Agriculture	81%
Natural Greenspace	2%
Woodland	3%
Coastal	1%
Freshwater	1%
Built Land	9%
Urban Greenspace	2%

There are notable differences in the make-up of land uses within the region. Lincolnshire has a much a higher proportion of agricultural land, at 92%, with only 4% of land built on. By contrast, the EMCCA area is only 71% agricultural land with 13% designated as built.



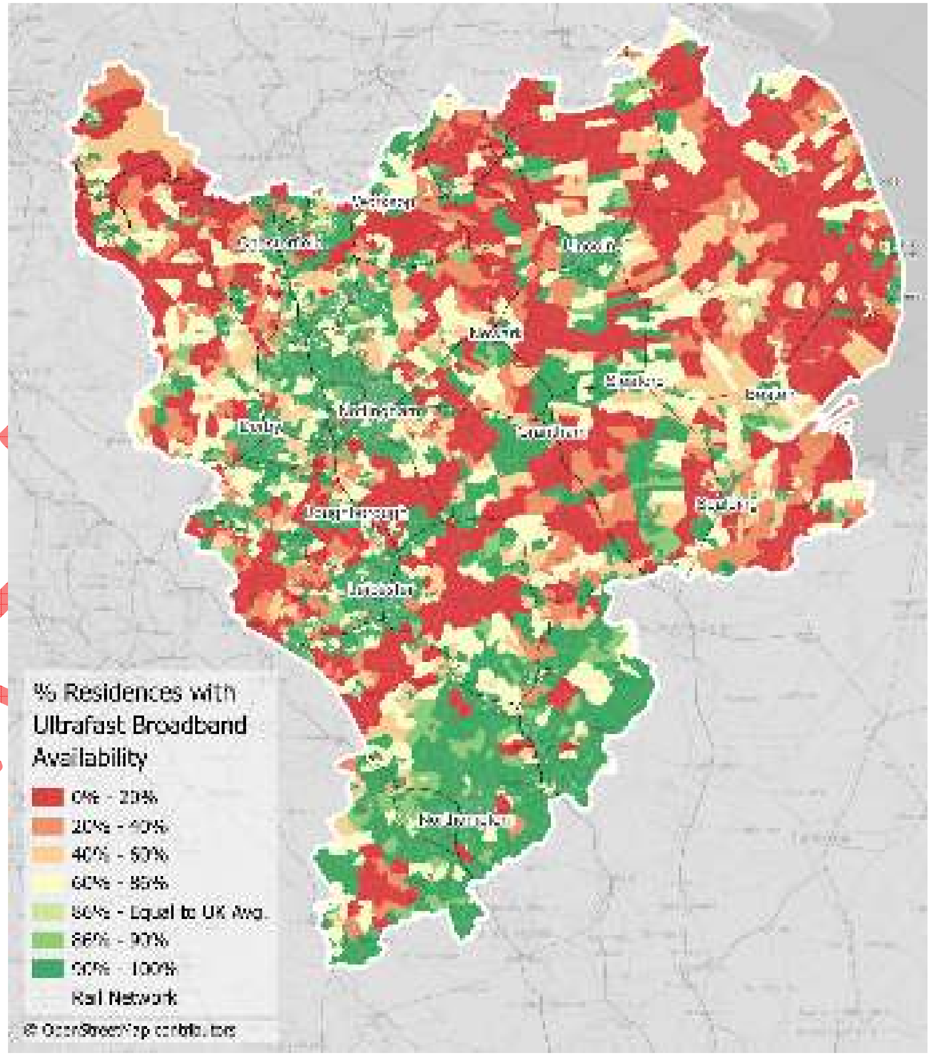
2.5 Digital connectivity

The UK average for access to ultrafast broadband (UFBB) (defined as a data service or connections that delivers a download speed of greater than 300MB/s) is 85% of residences. Across the East Midlands, the average is slightly above this, at 87%.

There is a clear gap in provision between urban and rural areas. The cities of Derby, Leicester and Nottingham all have over 96% of residences with UFBB, where as Lincolnshire are below 75%. Other pockets of poor coverage include rural Derbyshire, Nottinghamshire and Leicestershire.

The picture is similar for commercial premises. The East Midlands average (86%) is significantly above the UK average (69%), with region's cities offering the best coverage and its rural areas suffering from significantly more connectivity black spots.

Sub-region	Ultrafast broadband availability	
	Homes	Premises
East Midlands Combined County Authority	89%	87%
Greater Lincolnshire Combined County Authority	76%	75%
Leicester, Leicestershire and Rutland	88%	87%
North and West Northamptonshire	95%	94%
UK	*86%*	*69%*



At a regional level, the East Midlands has good provision of ultrafast broadband services, particularly for commercial residences, compared to the national average. However, there are significant pockets of poor connectivity in the region's rural areas.

2.6 Social mobility

The social mobility index encompasses four composite measures of social mobility. Each region is then graded from least to most favourable against each of the composite measure. The composite measures are:

- Promising Prospects – the most 'promising prospects' for 25 to 44 year olds – measured by levels of education, professional work, and earnings. The index measures how well young people from similar socio-economic backgrounds do in education and the labour market.
- Conditions of childhood – measured by childhood poverty, and the qualifications and occupation levels of parents. This index captures whether the conditions children grow up in are good for promoting social mobility.
- Labour market opportunities for young people – labour market opportunities for 16 to 29 year olds across the UK, measured by their occupation level and unemployment rate. This index shows which areas offer more or less favourable employment opportunities for young people.
- Innovation and growth – which local authorities in the UK offer more or less favourable conditions to help promote innovation and economic growth – this is measured by each area's broadband speed, business spending on research and development, and percentage of residents with postgraduate qualifications.

At a regional level, the East Midlands falls within the 'middle' group for most measures and across most local authority areas. The exceptions to these are:

- Leicester – least favourable for conditions of childhood.
- Lincolnshire – unfavourable for innovation and growth.
- Nottingham – unfavourable for conditions of childhood.
- Rutland – favourable for conditions of childhood.

Digging deeper, the East Midlands ranks the lowest of all regions in the country (at 22%) in the percentage of people whose parents did not have a degree but have a degree themselves, demonstrating low educational mobility and a low proportion of people who are able to educationally outperform their parents. By way of contrast, the proportion is 26% for the West Midlands, 30% for the North West and 39% for London.

In terms of housing mobility and linking home ownership between people and their parents, the East Midlands ranks 4th in the UK in the percentage of people who own a home who parents do not (48%). This demonstrates the relative ability of residents in the East Midlands to achieve upward housing mobility compared to their parents, outperforming regions such as London (35%), Yorkshire and the Humber (44%) and the North East (45%).

Considering occupational mobility, Derbyshire, Nottinghamshire, and Lincolnshire rank in the lowest 20% in the country in upward mobility (achieving a higher occupational class than your parents), whilst Leicestershire, Rutland and Northamptonshire rank in the highest 20%.

At a regional level, the East Midlands, like much of the much of the country, is broadly near the average in terms of social mobility. However, there are some notable exceptions, such as conditions for childhood, which are unfavourable in Leicester and Nottingham, and favourable in Rutland. Lincolnshire is also unfavourable for innovation and growth.

It is worth noting that East Midlands is bottom of all UK regions in terms of educational mobility, with a large proportion of its residents unable to educationally outperform their parents. The region ranks higher when considering upward housing mobility, behind only the South West, Wales and Scotland.

3. THE SPATIAL ECONOMY

3.1 Structure and scale of the economy

The East Midlands economy generated £140bn of economic value in 2023 – around 6.6% of the English total. The region hosts 2.2m employees and 75,000 working owners of companies such as directors, partners and sole traders.

Over the 25 years to 2023, the region's economy grew by 43% in real terms – considerably slower than growth in England as a whole.

The economy is polycentric – characterised by multiple mid-sized urban economies rather than one dominant core. The regional economy is also spatially asymmetric with economic activity clustered primarily in the broader M1 corridor which serves the industrial core. The three cities of Derby, Leicester and Nottingham account for around a quarter of all regional economic output, with other market towns in this corridor such as Loughborough, Mansfield and Chesterfield contributing to economic density in this western part of the region. Further poles of activity around Northampton in the south, more sparsely distributed market towns across the west (such as Lincoln, Grantham, Newark and Sleaford), and at the Lincolnshire coastal periphery complete the polycentric picture.

A large, diverse, well-located economy – but spatially fragmented, and underperforming in growth terms.

3.2 Economic performance and productivity

Economic output per head in the East Midlands lagged 24 percentage points behind England in 2023. A better measure of productivity is output per hour worked which shows a shortfall of 16% compared to England as a whole. Over the last 25 years the region has fallen further behind. Output per hour worked is similar to peers in the North East and West Midlands but lagging behind the North West.

UNDERSTANDING PRODUCTIVITY IN THE EAST MIDLANDS

There are many way to express outputs and inputs and each can help understand the reasons for the East Midland's economic performance. This section breaks down different measures of inputs and outputs and explores the reasons for gaps between the East Midlands' economic performance and that of its peers.

Simple measures of productivity are based on output per head. This simply captures the total economic output and the total number of residents in a region. The GVA per head of the East Midlands is 76% of the UK average. A small part of the shortfall is explained by demography and the employment rates. The region has a slightly smaller share of working age people and a slightly lower share of these people who are actually in work. Together these close the gap by around 2%.

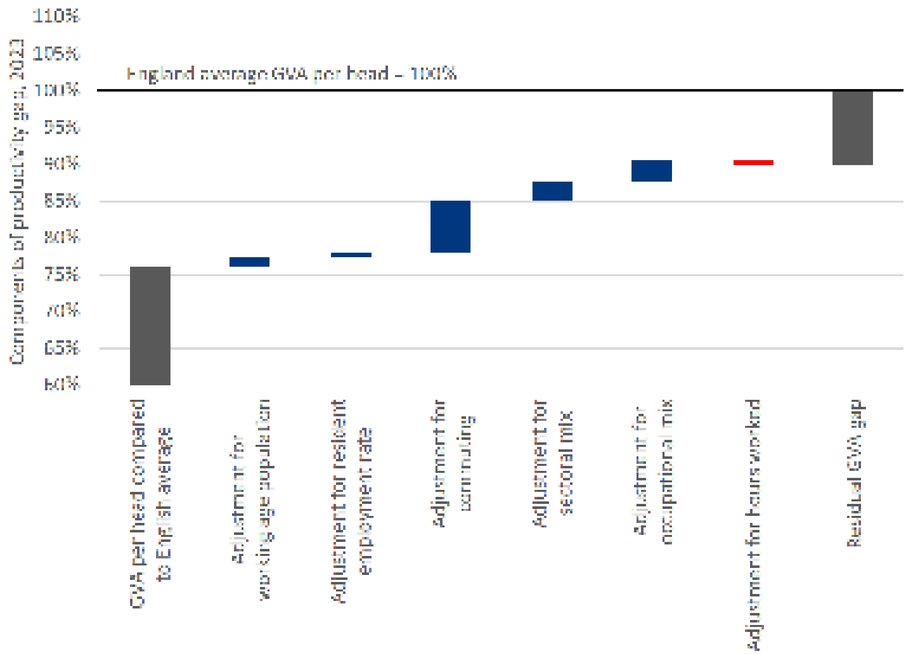
More instructive measures of productivity compare total output with the total number of people working in the region. This shifts the basis of the calculation away from residents to reflect commuting into and out of the region. This makes a big difference because around 107,000 people commute into the region each day while 146,000 commute out of it to jobs elsewhere. Output per filled job in the region is 85% of the English average. Adjusting for commuting narrows the gap with the English average by seven percentage points to 15 points.

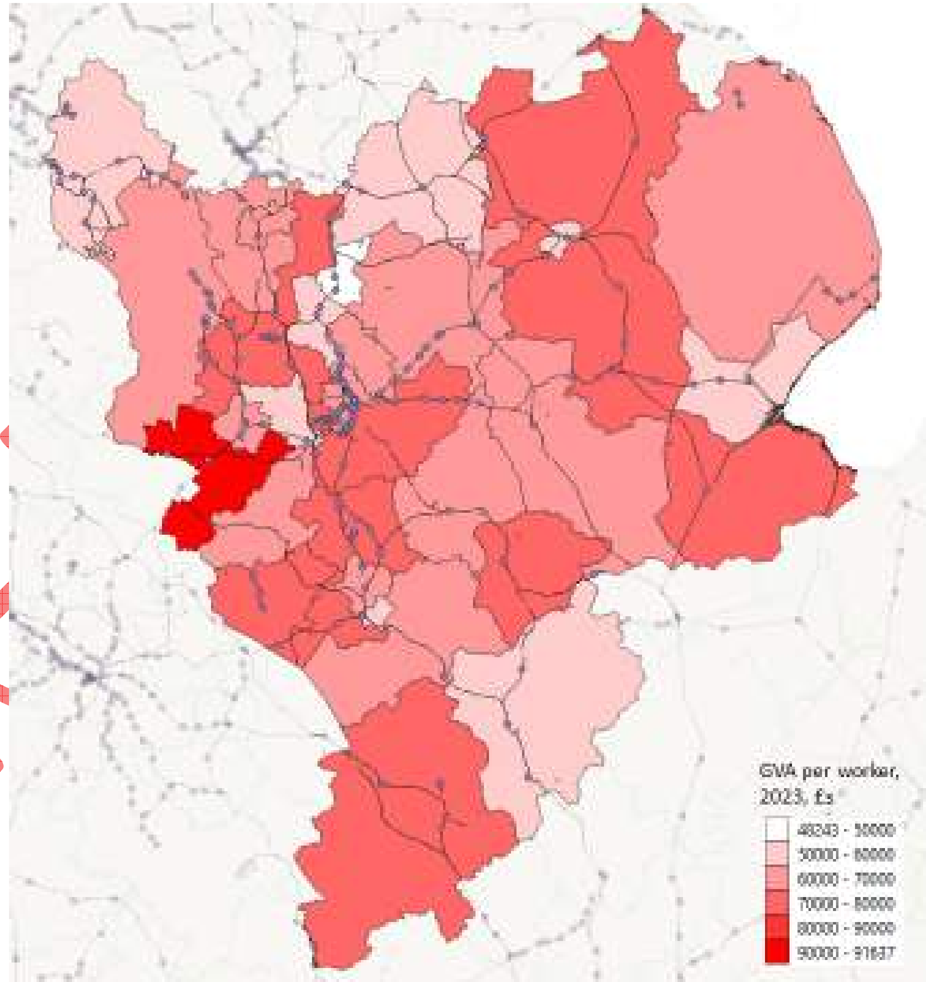
This difference can further be broken down by exploring the influence of the sectoral mix, the occupational mix and the number of hours that people work. East Midlands industries are skewed towards less productive activities such as transport and storage. Jobs are also skewed towards less productive occupations such as sales, customer service and elementary occupations. Each of these effects account for around 3% of the productivity gap. Output per hour worked is around 90% of the English average once these factors are accounted for.

Workers in the East Midlands keep quite similar hours to their English peers, working around 1% fewer hours per worker. Adjusting for this means that the gap between output per worker is slightly bigger than the gap between output per hour.

After taking account of all of these factors, the residual productivity gap between the East Midlands and England as a whole is around 10%. Some of these factors point to opportunities to boost economic output – for example by shifting the nature of activities in the region or reducing local unemployment – but also points where structural factors (like local demography) may contribute to a persistent gap.

Figure 1: Decomposing the East Midlands' productivity gap





SOURCE: CONNECTED ECONOMICS ANALYSIS

SUB-REGIONAL PRODUCTIVITY

[Productivity map shows surprising results. Need to dig into it further.]

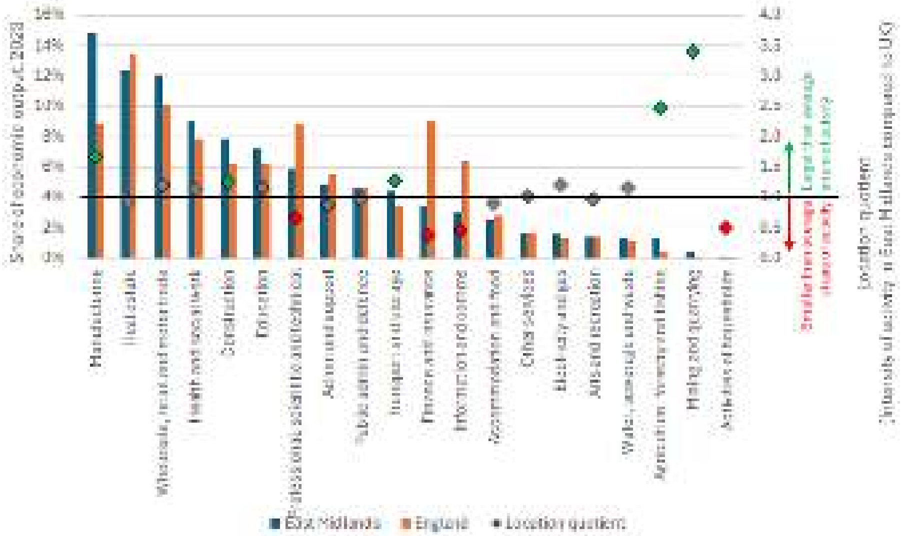
Productivity lags around 16% behind the national average, hampered by the mix of jobs and activities – and it is falling further behind.

3.3 Industrial and sectoral structure

In 2023, the East Midlands generated £140bn of economic output. The economy grew by 11.8% over the preceding ten years. Growth has been slower than in the UK overall which saw 16.8% real growth over the same period.

The largest sector of the East Midlands economy is manufacturing, accounting for 15.6% of economic output. This is followed by wholesale, retail and the motor trade (12.7%), and then real estate (11.6%) and health (9.2%).

This pattern is quite different from the average across England as a whole. Manufacturing makes up a much larger share of output in the East Midlands – as shown by the green diamond in the chart. Other sectors like agriculture, forestry and fishing, and transport and storage are also overrepresented compared to the UK average. Other sectors are significantly under-represented in the region – notably finance and insurance, information and communications and professional, scientific and technical activities.

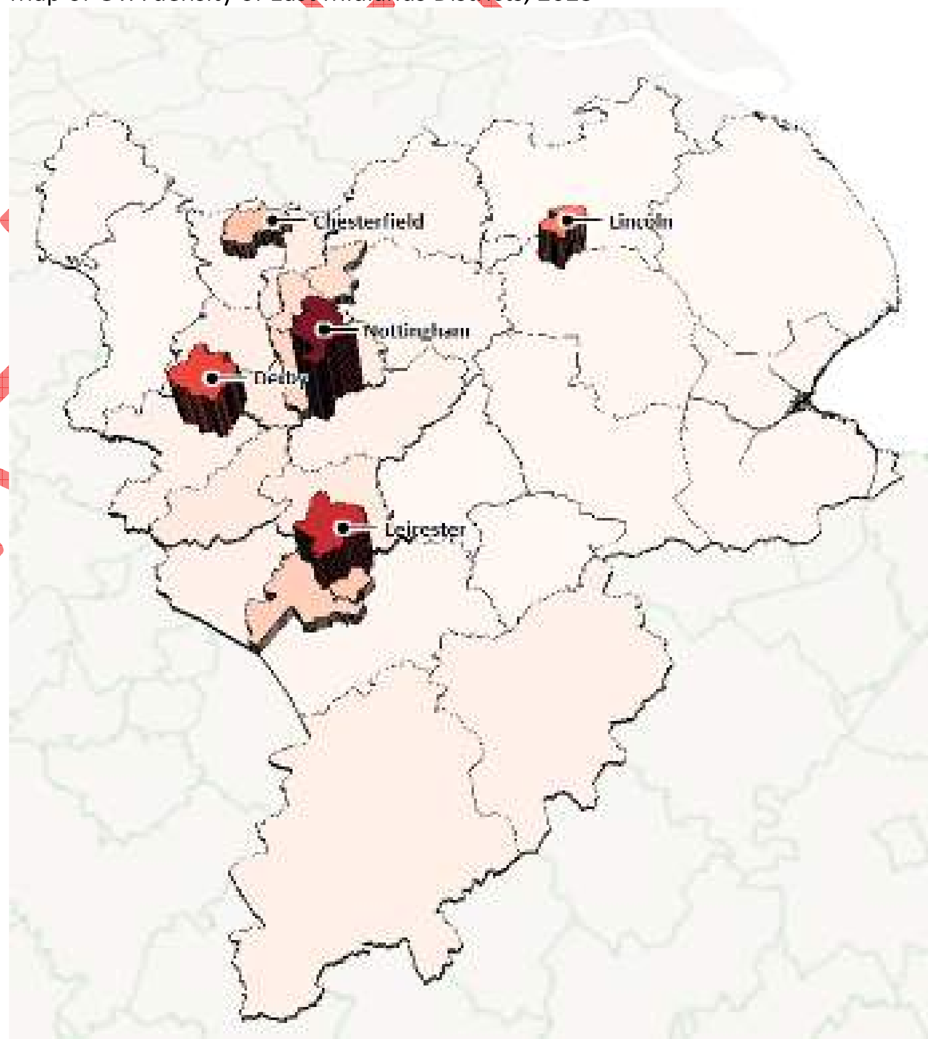


The East Midlands is a manufacturing powerhouse, but under-developed in finance and IT and other professional and technical activities.

3.4 Clusters, hubs and growth poles

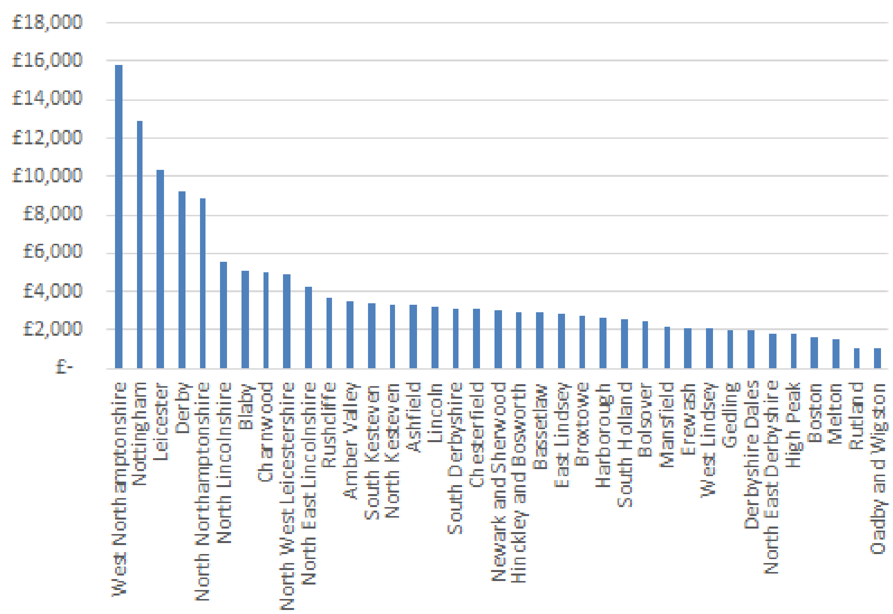
Geographically, economic activity is concentrated in the three largest cities of Nottingham, Leicester and Derby – each accounting for more than £9bn of economic output.

Map of GVA density of East Midlands Districts, 2023



Smaller towns of Chesterfield and Lincoln also stand out for their concentrations of activity. However, West Northamptonshire and North Northamptonshire are also large economies – together generating around £25bn of economic activity.

GVA of East Midlands Districts, 2023, £m

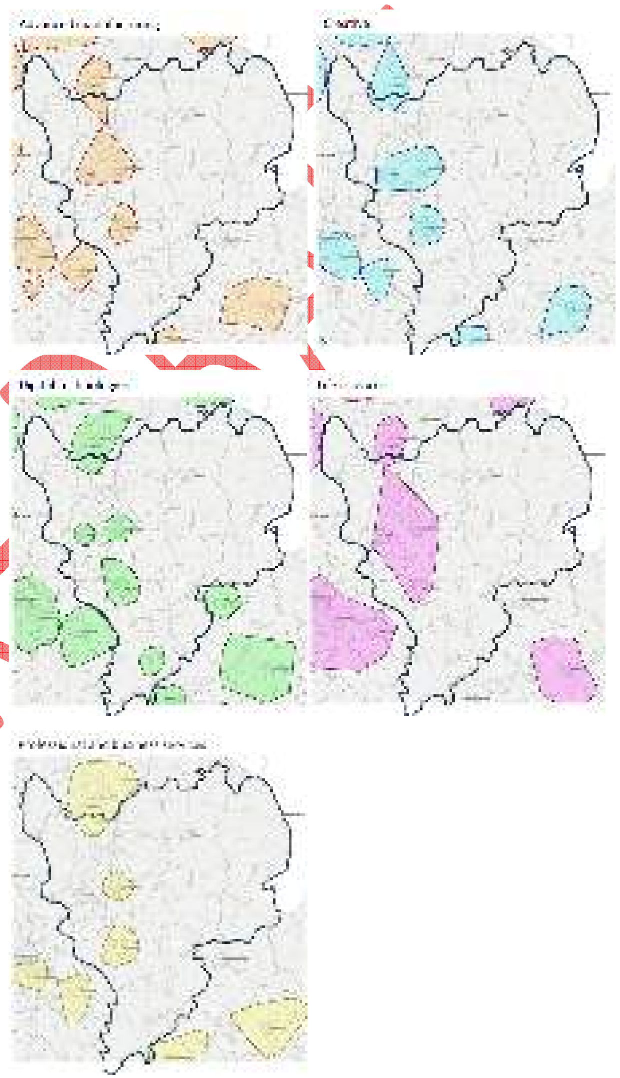


[Note on more local specialisms – e.g. food and drink and textile manufacturing in Leicester, retail in Nottingham, engineering in Derby and agriculture in Lincolnshire. Is this better in text or shown on a map?]

Spatial concentrations of high-value activity:

- Manufacturing/engineering: Derby, Nottingham, Loughborough corridor.
- Freight and logistics: East Midlands Gateway, M1 corridor.
- Clean energy & innovation: Ratcliffe-on-Soar, Freeport, Institute of Technology.
- Tourism and leisure: Peak District, Lincolnshire coast.

Cluster maps of Industrial Strategy sectors



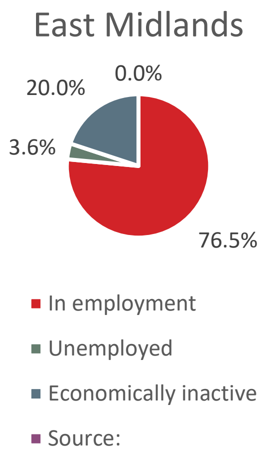
Many of the growth sectors in the industrial strategy have clusters in the East Midlands – all close to the M1 corridor and particularly focused on Leicester, Nottingham and Derby. The notable exception is financial services which does not have a local cluster.

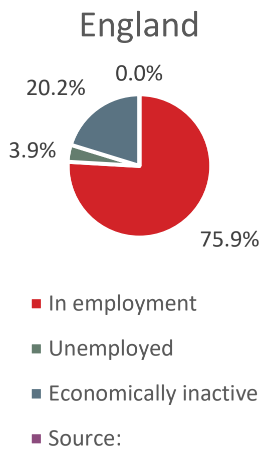
Clusters are powerful but dispersed—transport integration determines how well they function as a system.

3.5 The labour market and workforce

LABOUR SUPPLY AND ECONOMIC ACTIVITY

Of the 4.9m people that live in the East Midlands, around 3m are of working age and 2.5m are employed. The share of economically active people in employment is slightly higher than in England (76.5% compared to 75.9%). This is because of both a lower unemployment rate and lower levels of economic inactivity.

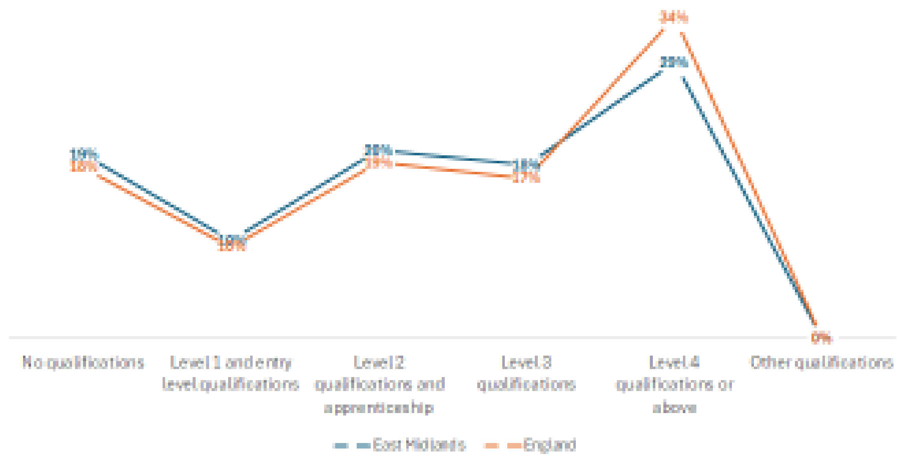




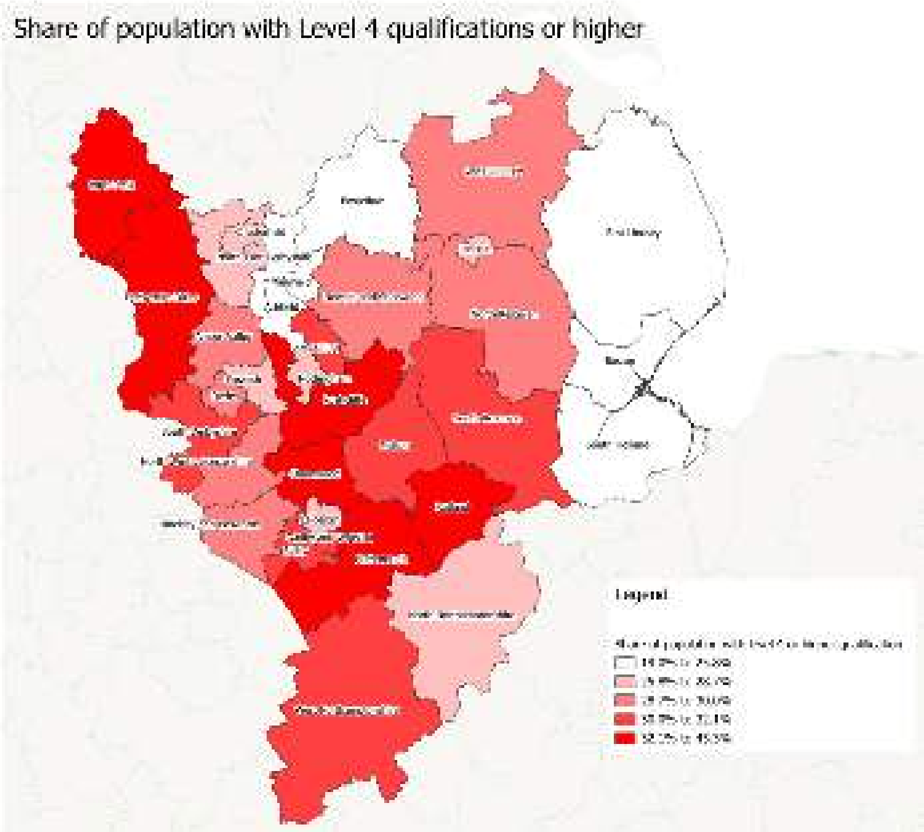
A key reason for inactivity is health. The region has nearly 200,000 long-term sick – a higher share than England – equating to 30% of all economically inactive people. The excess rate equates to 12,000 additional people long-term sick in the East Midlands and around £800m in lost economic output.

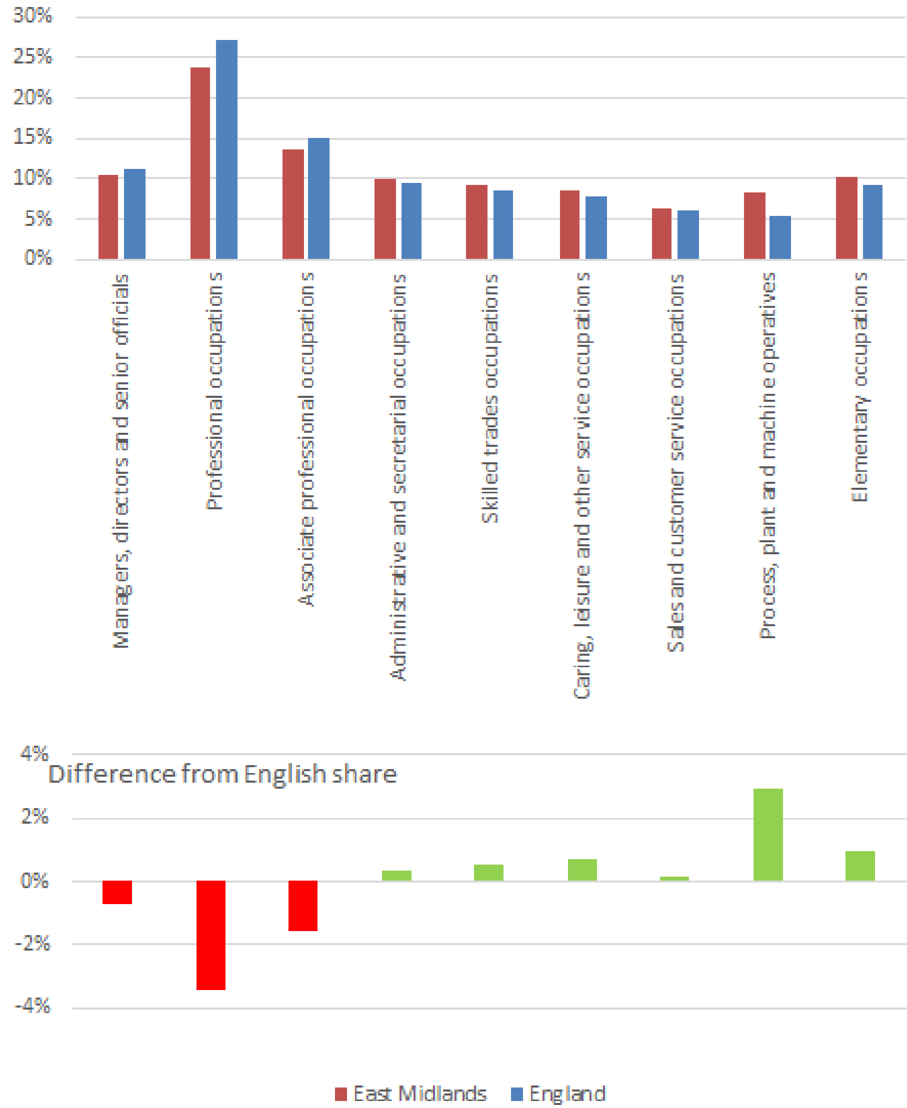
Males in the West Midlands can expect to live five months less than people in England as a whole, and females four months less. However, there is a larger difference in the time spent in poor health. Males can expect 13 months less healthy lifetime and females 20 months. In the region, life expectancy is higher in rural areas and lower in the cities. The mortality rate from COPD is the same as England while obesity levels are higher (29.1% compared to 26.5% for England as a whole).

Residents of the East Midlands have a notable deficit in the highest levels of qualifications. Only around 29% have a degree level qualification or above compared to 34% of the English population. Within the region, Leicester shows a high level of people with no qualifications while Rutland has a high share of degree qualified residents or higher.



Highly qualified residents are concentrated in the hinterlands of Leicester and Nottingham and in the north-west of the region. Fewer well-qualified residents live in the Lincolnshire coast area.





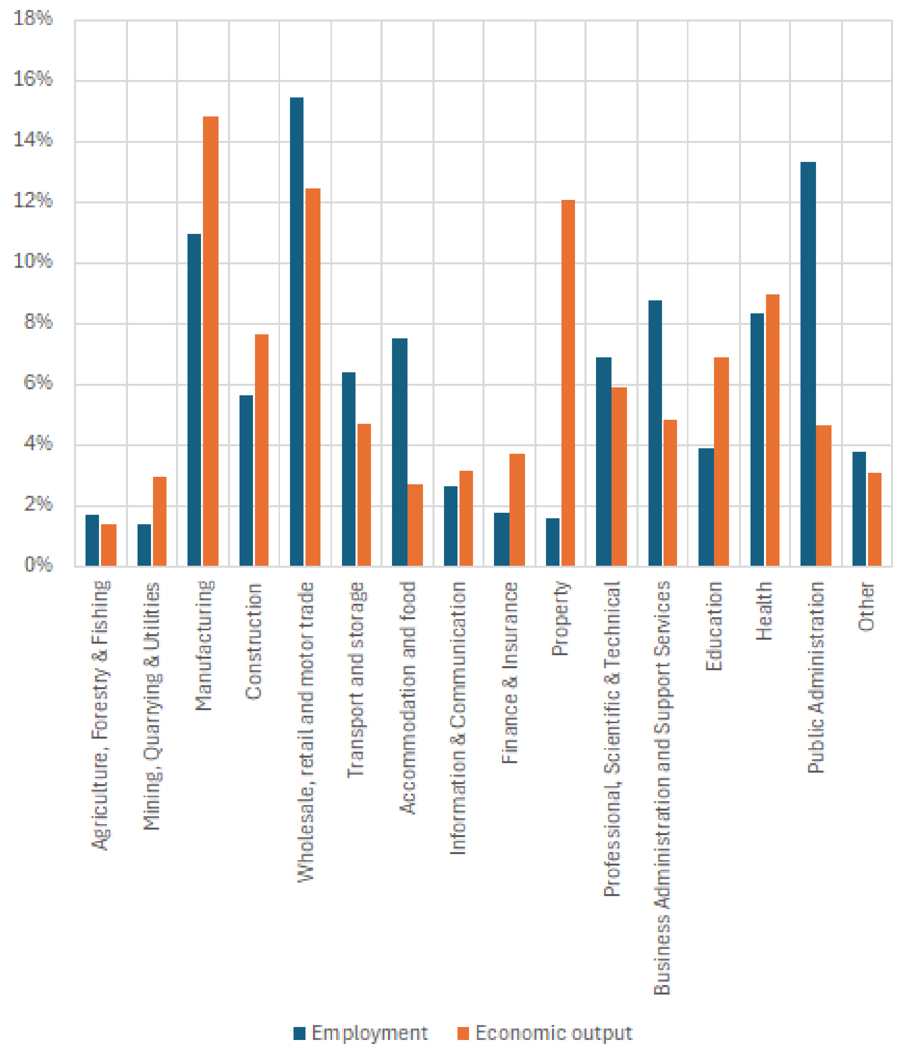
LABOUR SUPPLY AND OCCUPATIONAL MIX

The occupational mix shows that professional occupations are under-represented in the East Midlands compared to the English average while process, plant and machine operatives are over-represented.

LABOUR DEMAND

The economic activities of the East Midlands support around 2.5m workforce jobs.

Share of employment and economic output in the East Midlands, 2022



Workforce jobs are concentrated in wholesale, retail and the motor trade (346,000 jobs, 15.4% of jobs), public administration (299,000 jobs, 13.3% of jobs), and manufacturing (246,000 jobs, 14.8% of jobs). The labour productivity of different sectors can be seen in the difference between employment shares and economic output shares. Manufacturing, for example has high labour productivity and its share of output is higher than its share of employment, while the wholesale, retail and motor trade sector has relatively low labour productivity and needs 15.4% of regional employment to generate 12.4% of regional GVA. (Note that this assessment of labour productivity does not capture differences in full and part time jobs and hours worked, so should be treated as indicative.)

[Chart of growth in employment over time in EM and UK – indices]

SPATIAL LABOUR DEMAND AND TRAVEL TO WORK

[Map of workplace employment density in East Midlands]

1.47m commuters live in the East Midlands with the remainder of the workforce working from home or having no regular place of work. Leicester, Nottingham and West Northamptonshire have the highest numbers of resident commuters – each with over 100,000 – while Rutland has the fewest, reflecting its smaller population.

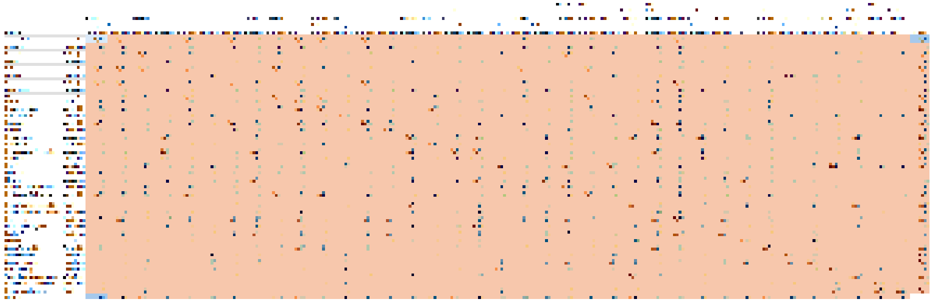
Jobs in the East Midlands are difficult to come by. Job density is a measure of the number of jobs per person aged 16 to 65, and measures only 0.79 in the East Midlands – lower than peer regions such as the West Midlands (0.82) and the North West (0.83), but higher than the North East (0.74). In London job density is 1.07. This forces residents to look beyond the region for jobs. Of the 1.47m commuters, 146,000 (9.9%) go to jobs outside the region.

Overall, 107,000 people or 7.5% of people that work in the East Midlands commute in from neighbouring regions. The region therefore sees significant net outward commuting or around 39,000 people. (Note that this data is drawn from the 2021 census which was affected by the COVID-19 pandemic. This will have affected the scale of commuting and could also have affected the patterns of it.)

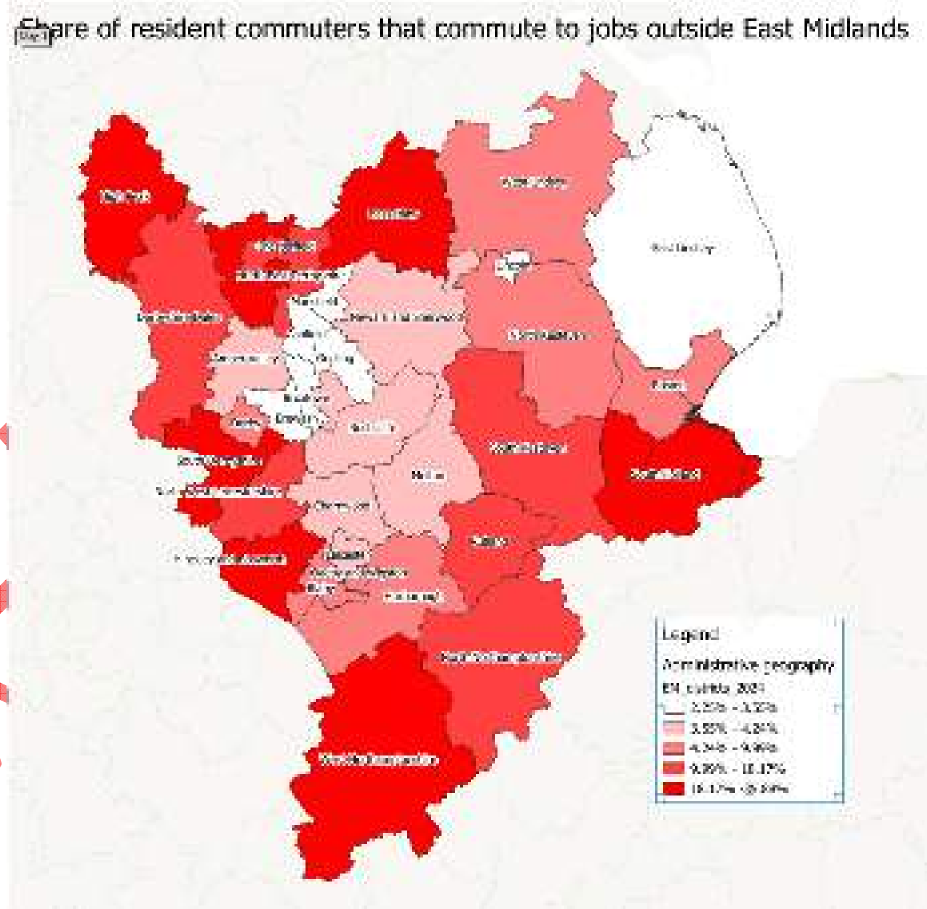
Commuting is very different in different areas. By far the largest net in-commuting is seen in Nottingham with around 54,000 people commuting in and 30,000 commuting out, leaving net inward commuting of around 24,000. Other significant net attractors of labour are North West Leicestershire, West

Northamptonshire, Derby and Leicester. The most residential areas that see the most net outward commuting are North Northamptonshire, North East Derbyshire and Gedling in Nottinghamshire.

[Can we map commuting flows using flow lines in GIS? I have extracted the data from Census JTW…]

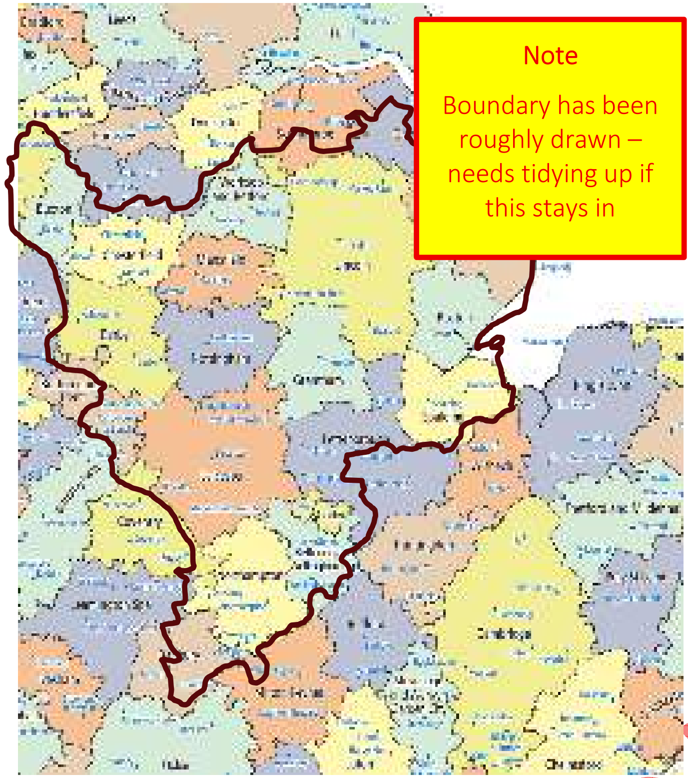


Commuting flows beyond the region are significant. More than one third of High Peak residents that commute go to places outside the region (mainly Manchester) while for Gedling in Nottinghamshire this is only 2%. Almost all districts show net out-commuting from the region with only three out of 37 showing low levels of net inward commuting (Harborough in Leicestershire, Chesterfield, and North Kesteven in Lincolnshire). The largest numbers of net out-commuters are seen in North Northamptonshire and High Peak in Derbyshire.



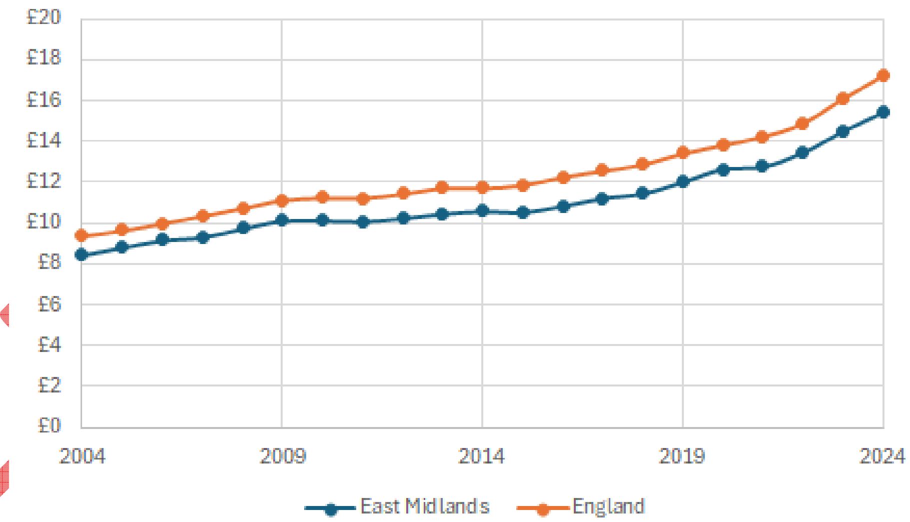
There are 15 defined travel to work areas that sit within the East Midlands, and several more that cross its boundaries such as Peterborough and Banbury to the south, Burton-upon-Trent to the west and Grimsby to the north.

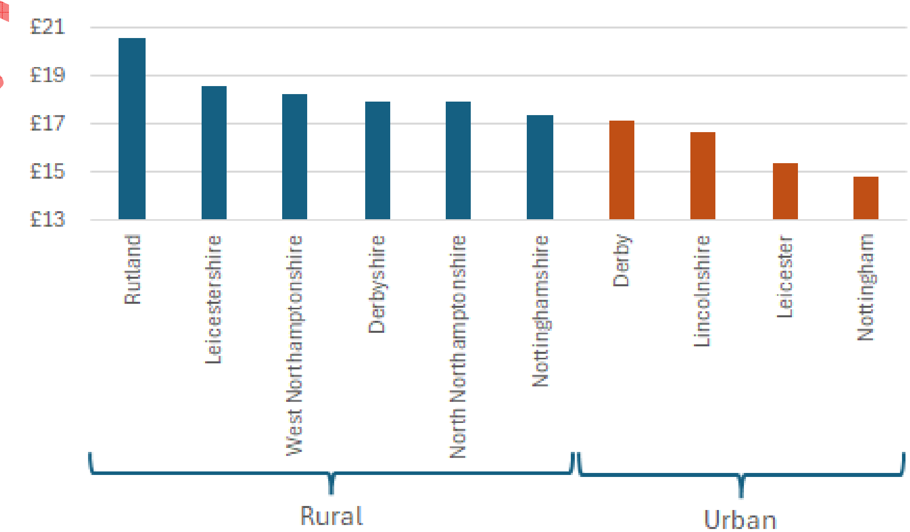
Map of TTW areas



LABOUR MARKET OUTCOMES

Gross hourly pay, 2004 to 2024





With few jobs in the region, a relatively unskilled workforce and an economy skewed to lower value occupations and sectors, wages in the region are relatively low – consistently around 10% below the English average.

While pay is lower, it follows same trajectory as England – showing that the same national macroeconomic forces tend to drive changes in it.

Pay is lowest in Leicester and Nottingham and highest in rural areas – Rutland, Leicestershire, Derbyshire and the South (Northamptonshire). (Is this workplace based or residence based?).

Message: With relatively few jobs around, and skewed to lower value activities, regional wages are low. Labour markets are regionally fragmented with many workers loking outside the region for employment. Better transport enlarges employment search areas and opportunities and helps rebalance labour suply and demand.

2.6 Trade, connectivity and economic linkages

The East Midlands is a trading economy. The total value of exports of goods and services in 2020 were £114bn – or around 103% of the value of the region's economic output. (Goods can be traded multiple times as parts move through supply chains. Trade values may therefore count the value of the same good or service more than once – so trade values can be larger than the value of economic output.)

Around a quarter of trade is international and three quarters domestic.

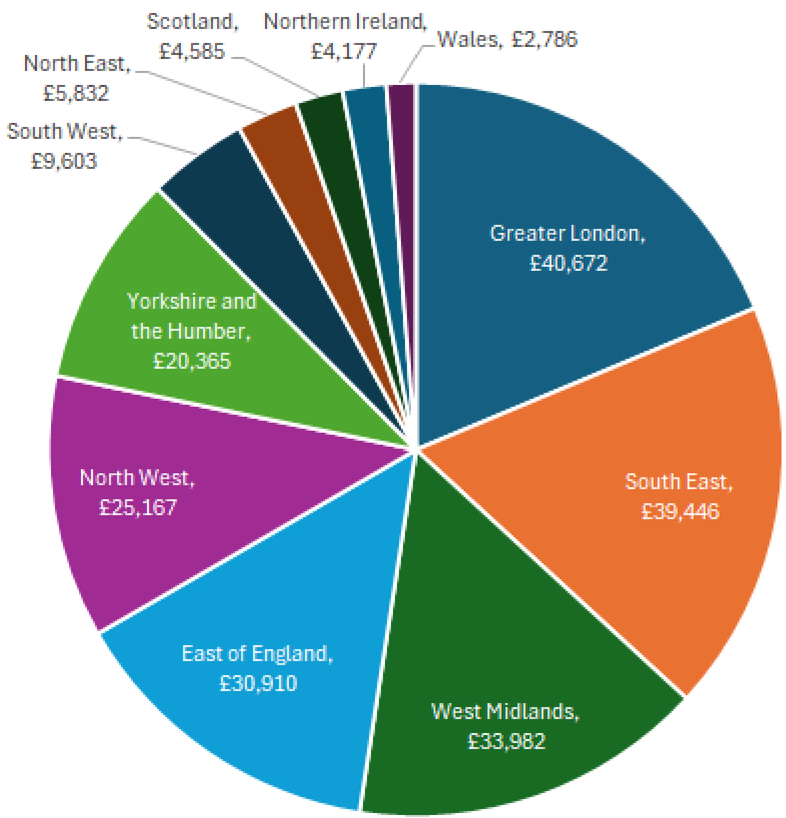
DOMESTIC TRADING RELATIONSHIPS

The total value of exports of goods and services to other regions of the UK in 2020 were £84.5bn and international exports – or around three quarters of the value of regional economic output. Note that these interregional trade statistics are experimental and should be treated with caution.

Domestic exports of goods and services are of similar magnitudes with goods exports of £44bn and services exports of £41bn. Three quarters of goods trade is in wholesale, retail and the motor trade with most of the remainder in the manufacturing sector.

The main domestic trading partners are Greater London, the South East and the West Midlands, which together account for more than half of interregional trade.

Value of trade in goods and services by regional partner, £m, 2019-2020



INTERNATIONAL TRADE

While domestic trade is balanced between goods and services, international trade is dominated by goods – which make up around 80% of international exports from the region. The main global trading partners are

Two thirds of international goods exports are in the manufacturing sector and the remainder mainly in wholesale and the motor trade.

Trade and the transport network [does this live more naturally in the next section?]

- Mapping inter-regional trade flows
- Mapping East Midlands hubs of activity (manufacturing, freight, distribution) and transport nodes (e.g. East Midlands Airport)

The East Midlands punches above its weight in goods movement but below in value creation.

3.7 Summary and implications

Synthesis of key insights:

- Strengths: location, industrial base, logistics excellence.
- Challenges: productivity gap, skills, fragmentation, under-investment.
- Opportunities: leveraging connectivity to integrate markets and drive higher value growth.

To unlock these strengths and address these gaps, transport investment is a direct lever for raising the region's productivity and competitiveness.

4. TRANSPORT AND CONNECTIVITY

4.1 The importance of transport connectivity to economic performance

[This may be more appropriate sitting further up.]

Regions and their settlements interact through a web of economic relationships that extend far beyond their administrative boundaries. These inter-regional linkages take several forms — including shared labour markets, supply-chain and business-to-business connections, access to shared assets such as airports and universities, and the movement of people for leisure and consumption. Together, they underpin patterns of specialisation, collaboration and productivity across the national economy.

Transport connectivity plays a role in facilitating, sustaining and deepening these relationships by providing reliable and cost-effective links between economic centres. In most contexts, speed and low costs in transport and communication provide a direct substitute for physical proximity. Agglomeration, the effect of bringing businesses and workers closer together, can bring economic benefits to these areas, providing a wider access to suppliers, clients, and infrastructure; efficiently matching workers to jobs and consumers with suppliers; and learning from each other within dense networks of connected businesses. Larger and denser labour markets may allow for more efficient allocation and division of workers, or an incentive to invest in skills.[3]

SEGRO Logistics Park East Midlands Gateway and the emerging East Midlands Freeport are examples of the benefits of clustering businesses and infrastructure, with improved transport connections enhancing this clustering. The proximity of East Midlands Airport, the M1, the Strategic Rail Freight Interchange, and 4.5m sq ft of logistics development can aggregate freight and logistics demand across the region, nationally and internationally.

4.2 A regional transport heritage

- *The transport sector as an employer in the EM/regional transport heritage:*
- *Strategic location as a cross roads for nationally significant sectors/employers*
- *Rich industrial history in railways and engineering, esp Derby – home to rolling stock companies and research centres, Alstom, EMR*
- *Bus – Trentbarton (Notts), Nottingham City Transport*
- *Manufacturing e.g. bicycles in Nottingham/Leicester*
- *Historic vehicles – transport museums, preserved railways*
- *EMA as major freight/passenger hub, logistics*
- *Derby HQ for Midland Railway*

4.3 Public expenditure in transport

Public expenditure on transport in the East Midlands is low compared to the rest of the country, and has remained so despite the growing levels of investment outside London since the COVID-19 pandemic. Regions such as the North West, North East, and Yorkshire and the Humber have seen their spending per head since 2019/20 increase by 50-60%, whilst spending in the East Midlands has only grown by 23% over the same period. In 2023/24, it was the region with the lowest spending on transport per head in the country and was the second lowest in terms of growth in spending since 2019/20, ahead of only the South East.

A similar story is true when considering spending on railways only. The East Midlands had the lowest spending on railways per head in 2023/24, dropping below the South West. Spending on railways in the region has only increased by

[3] Daniel Graham & Patricia Melo, Advice on the Assessment of Wider Economic Impacts: a report for HS2, March 2010.

47% since 2019/20, significantly outstripped by the increases in the North East (138%), North West (81%), Yorkshire and the Humber (72%) and the West Midlands (66%).

As well as spending per head, it is also interesting to consider spending per rail passenger journey alongside an average rail trip rate. In 2023/24, the East Midlands ranked fourth in England for railway spending per passenger journey (£27 per passenger journey), behind the North East (£43), West Midlands (£38) and the North West (£28). However, the average trip rate for the East Midlands (seven trips per person per year) was ahead of only the North East, and under half that of the West Midlands (13) and the North West (16). It is also significantly below the national average, although this is significantly skewed by London. Removing the effect of London, the average rail trip rate for the East Midlands is still under half the non-London average.

This, coupled with the underinvestment demonstrated in the regional per head expenditure data, potentially demonstrates that this underinvestment may be playing a role in constraining rail demand and causing the region to be underrepresented in terms of rail demand.

Table 3. Public expenditure on rail per passenger journey (public expenditure, HM Treasury, and ORR regional rail usage)

Region	Average public expenditure on rail per rail passenger journey (per annum)
North East	£43
West Midlands	£38
North West	£28
East Midlands	**£27**
South West	£20
Yorkshire and The Humber	£19
East	£14
South East	£12
London	£10
England average	*£14*

Table 4. Rail trip rates (ORR regional rail usage and ONS population data)

Region	Average rail trip rate (per person per annum)
London	107
South East	27
East	25
North West	16
West Midlands	13
Yorkshire and The Humber	12
South West	9
East Midlands	7
North East	6
England average	*30*
Non-London average	*16*

Table 5. Proportion of internal rail trips (ORR regional rail usage, 2023/24)

Region	Proportion of internal rail trips
Scotland	88%
North West	70%
London	64%
Wales	63%
West Midlands	62%
Yorkshire and the Humber	57%
South West	50%
North East	40%
South East	29%
East Midlands	27%
East	20%

Bringing further context to the data above is the proportion of rail trips that are internal to the East Midlands, which is markedly low compared to the other regions (apart from the East, areas of which lie within the wider London commuter belt, and would therefore have strong flows to the capital). What is notable is that, for the East Midlands, flows to London are most equal to that of internal trips. This is not the case for regions such as Yorkshire and the Humber, the West Midlands and the North West, where the London market is between 12% and 23% of the internal market.

On a per head basis, spending on transport (and particularly railways) in the East Midlands is low compared to the rest of the country. Increases in spending since the pandemic in regions such as the North East, North West, and Yorkshire and the Humber, partly an illustration of the effect of integrated settlements for longer established mayoral combined authorities, have dwarfed that of the East Midlands.

The data also demonstrates that while spend per rail passenger journey is relatively high in the region, the regional rail trip rate is low, further illustrating the low levels of investment and the latent demand that could be released through investment.

Further analysis demonstrates that almost three-quarters of rail trips in the East Midlands are with origins or destinations external to the region. This dominance of outward flows is potentially partly a symptom of the underdeveloped regional network, supporting the points around underinvestment above, coupled with good services to the capital from the cities in the region, but is certainly something of an outlier compared to most other regions of the UK.

Table 6. Public expenditure on transport (£ per head, sorted by 2023/24) (public expenditure, HM Treasury)

	2019/20	*2020/21*	*2021/22*	*2022/23*	*2023/24*
London	827	1,410	1,244	1,279	1,313
North West	455	595	629	676	729
West Midlands	466	592	626	648	706
South East	529	797	646	584	628
East	468	692	609	556	599
North East	361	568	469	541	541
Yorkshire and The Humber	331	525	419	432	495
South West	338	479	405	387	429
East Midlands	299	459	369	349	368
England	*487*	*736*	*652*	*651*	*693*
Scotland	*683*	*858*	*866*	*877*	*763*
Wales	*418*	*536*	*471*	*494*	*566*
Northern Ireland	*348*	*495*	*479*	*421*	*484*
UK	*496*	*729*	*656*	*655*	*687*

Table 7. Public expenditure on railways (£ per head, sorted by 2023/24) (public expenditure, HM Treasury)

	2019/20	*2020/21*	*2021/22*	*2022/23*	*2023/24*
London	653	925	842	952	1,047
West Midlands	288	388	473	510	477
North West	243	338	352	384	440
East	233	433	363	320	359
South East	249	446	328	321	327
North East	111	201	183	213	264
Yorkshire and The Humber	130	240	228	206	223
South West	148	230	195	163	178
East Midlands	119	213	190	185	175
England	*275*	*427*	*388*	*403*	*432*

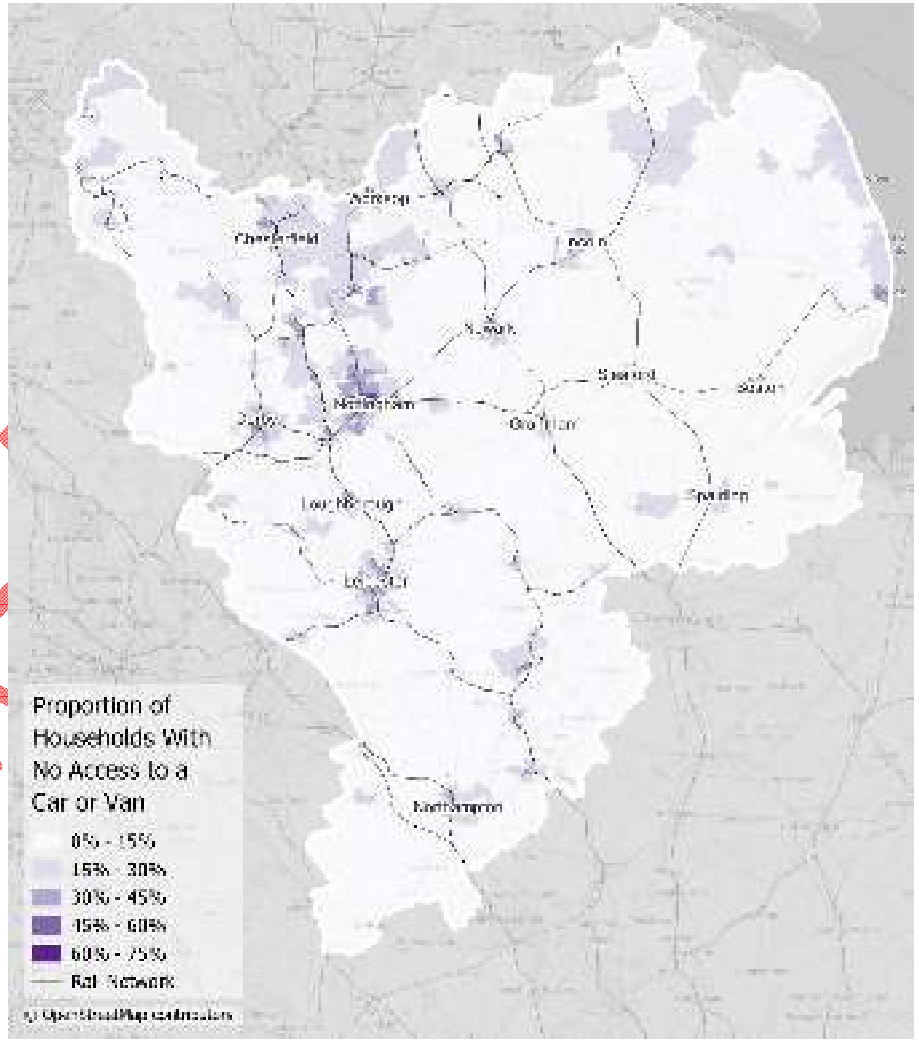
4.4 Demand and travel patterns

CAR OWNERSHIP

Across the East Midlands, there is a higher proportion of homes without access to a car (24%) compared to England as a whole (19%). There is a slightly higher proportion of homes with one car compared to nationally (41.3% compared to 40.9%), and lower proportions of homes with two or three or more cars.

The areas with the highest concentration of no car or van availability are in large part clustered around the urban centres and the key rail lines. Out of all the sub-regions, the EMCCA area has the highest proportion of households without cars, with North and West Northamptonshire the lowest. This partly reflects the greater public transport availability in the cities of Derby and Nottingham, compared to more rural areas of the region.

North and West Northamptonshire has the highest proportion of households with three or more cars, at 12% (10% nationally). This could indicate a higher number of households in higher income groups in this area.



TRAVEL TO WORK MODE SHARE

In using the 2021 census to assess the travel to work mode share across the East Midlands, there needs to be some caution and context provided. Data for the 2021 census was collected during the COVID-19 pandemic when there still restrictions in place in terms of travel and a resultant much larger propensity to work from home. Therefore, in the analysis presented, those that stated they work from home have been excluded from the results. Therefore, it is likely that the census data does not capture a travel to work picture that is truly representative of today, given that those who travelled to work at the time of the census were more likely to be key workers or in roles that could not be carried out remotely. Nevertheless, it is a useful indicator in terms of the differences within the region.

The areas of the East Midlands with the lowest car mode share for commuter journeys in the data are, as might be expected given the higher public transport availability, in the cities of Leicester and Nottingham. There are some notable more rural areas with quite low car mode share, such as the Derbyshire Dales and Bolsover, but these are potentially being skewed by the quite large work from home proportions in these areas.

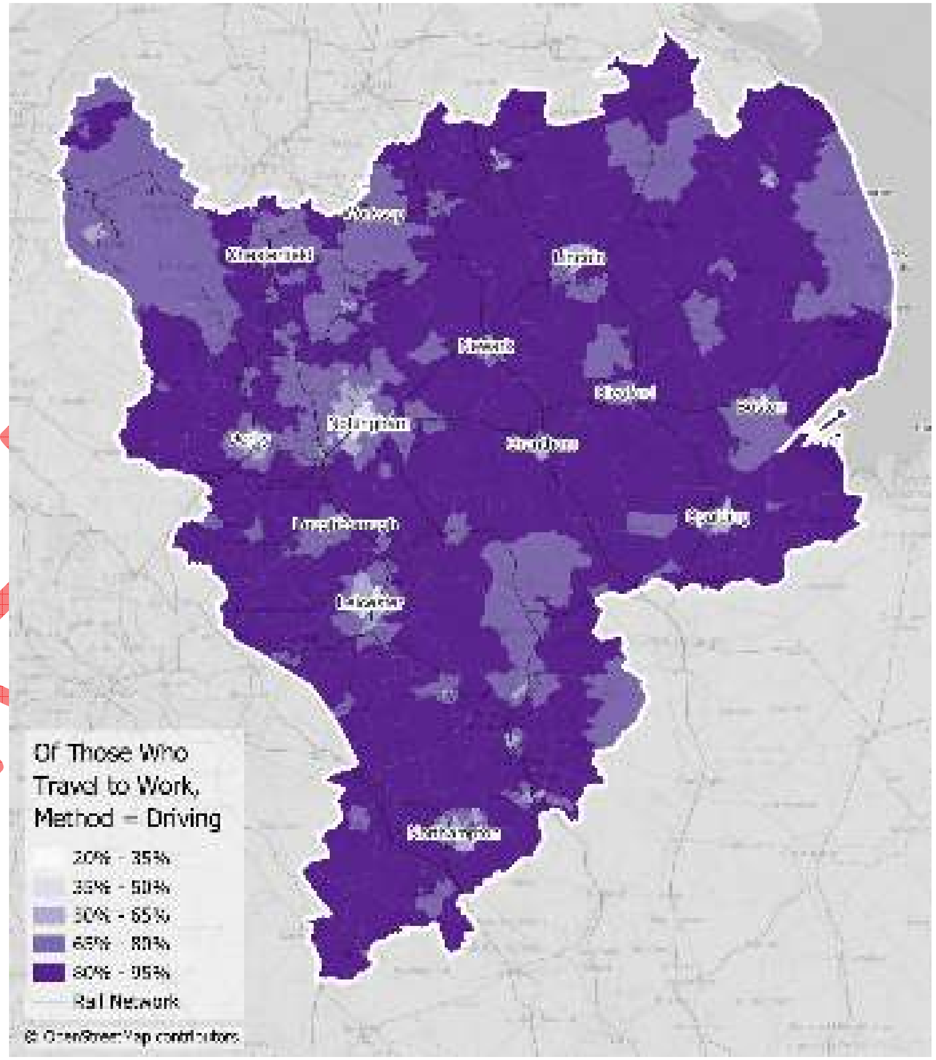


Figure 2. Method of travel to work = driving (excluding work from home) (2021 census)

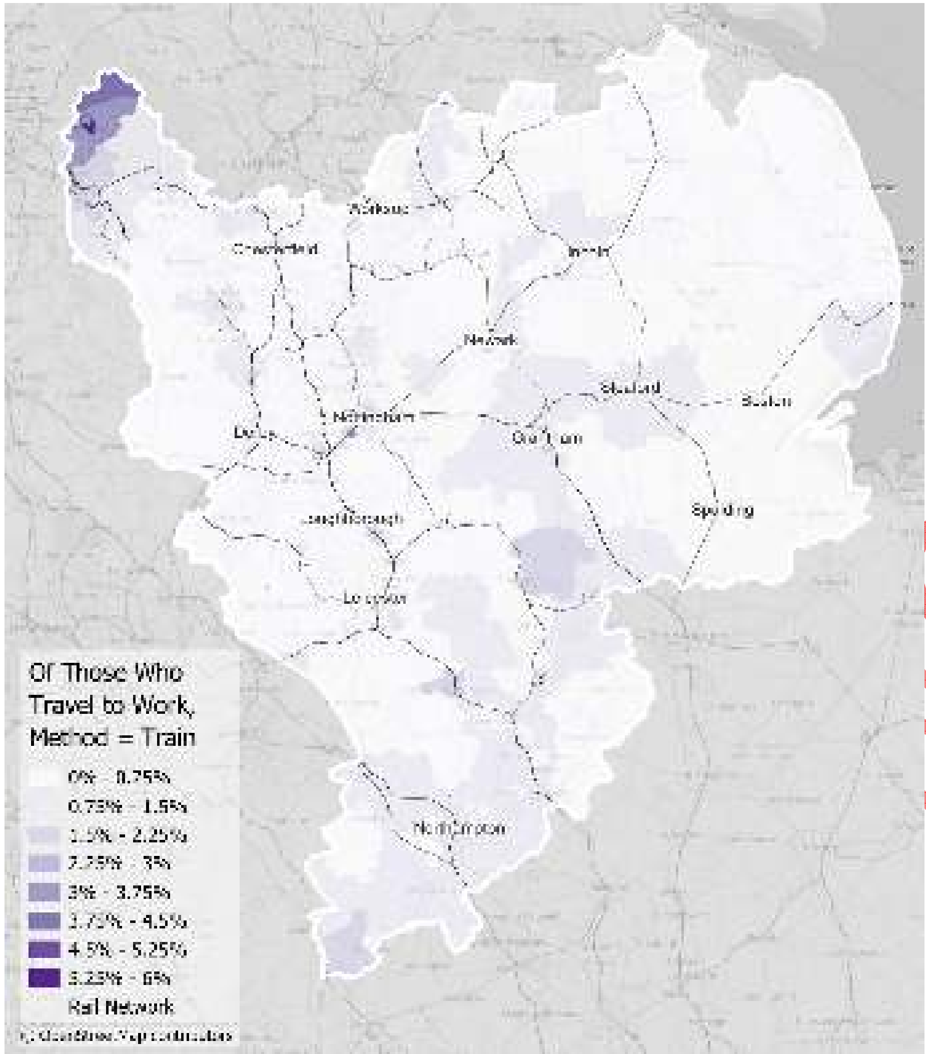


Table 8. Method of travel to work = rail (excluding work from home) (2021 census)

VEHICULAR TRAFFIC

At a regional level, all vehicular traffic has increased by 1% since 2019, returning to pre-pandemic levels. Out of all highway authority areas, Derby and Leicester have seen the largest increases since 2019, at 6% and 7% respectively. Nottinghamshire and Rutland have not returned to pre-pandemic traffic levels, and were both 2% down in 2024 compared to 2019.

Since 2014, the largest increase has been in Lincolnshire, and the lowest in Nottinghamshire.

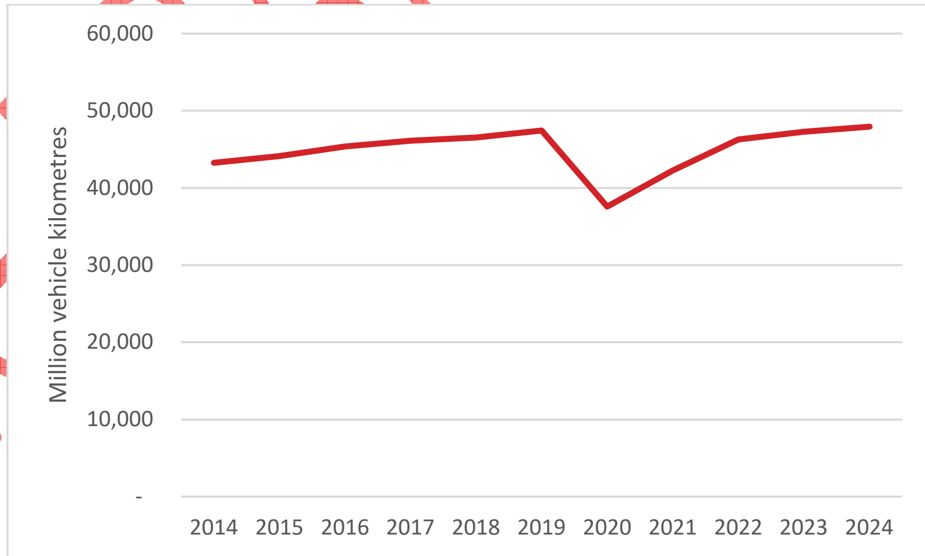


Table 9. Increases in total motor vehicle kms (DfT road traffic statistics)

Highway authority	Increase since 2019	Increase since 2014
Derby	6%	13%
Derbyshire	1%	11%
Leicester	7%	12%
Leicestershire	1%	9%
Lincolnshire	1%	15%
Northamptonshire	2%	14%
Nottingham	1%	11%
Nottinghamshire	-2%	6%
Rutland	-2%	14%
East Midlands	*1%*	*11%*

Derby, Leicester, Nottingham are all consistently below regional and national averages for freight traffic as a proportion of all traffic. Meanwhile, Leicestershire, Lincolnshire, Northamptonshire and Rutland are all above these same comparators.

Over the last 5-10 years, Rutland is consistently top of the region in terms of freight vehicle proportions. Consistent with the national picture, there was a noticeable jump in freight traffic following the COVID-19 pandemic (an increase in four percentage points between 2019 and 2020), which has subsequently fallen back slightly in the intervening years.

All areas of the region are still above 2019 levels for freight vehicle proportions, although Derby and Leicester are only fractionally so. Derby, Leicester and Nottingham all have lower freight proportions than in 2014. Across both five- and ten-year periods, Northamptonshire has had the largest increases in proportion of freight.

When considering freight traffic on its own, rather than as a proportion of all traffic, the number of freight vehicle kms has increased in all areas of the East Midlands. At a regional level, it has increased by 9% since 2019 and by over a fifth since 2014. Again, Derby, Leicester and Nottingham display the smallest increases, with Northamptonshire displaying the largest.

Table 10. Increases in freight vehicle kms (LGVs and HGVs) (DfT road traffic statistics)

Highway authority	Increase since 2019	Increase since 2014
Derby	8%	7%
Derbyshire	9%	23%
Leicester	9%	4%
Leicestershire	7%	20%
Lincolnshire	8%	23%
Northamptonshire	12%	30%
Nottingham	7%	8%
Nottinghamshire	6%	18%
Rutland	4%	24%
East Midlands	*9%*	*21%*

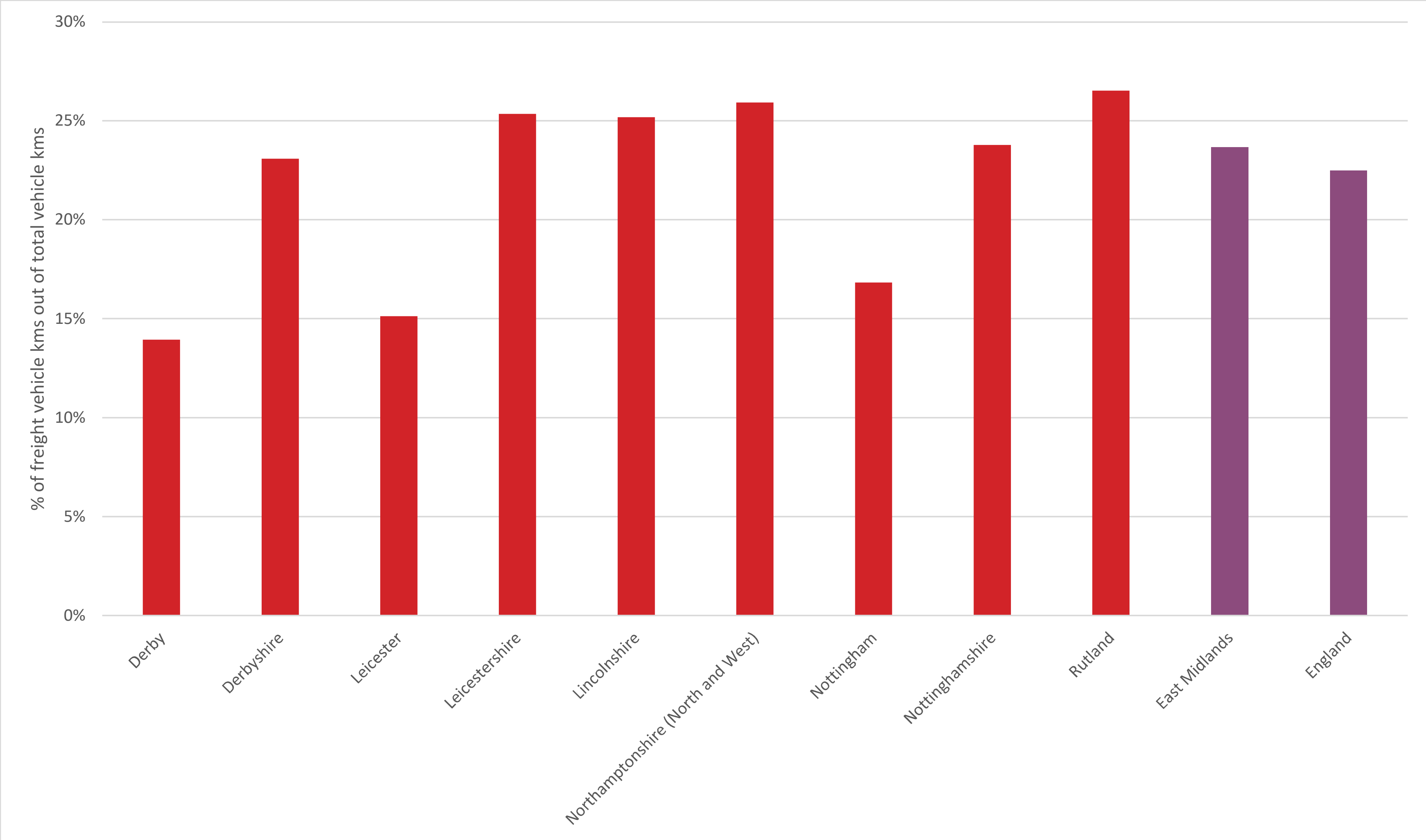
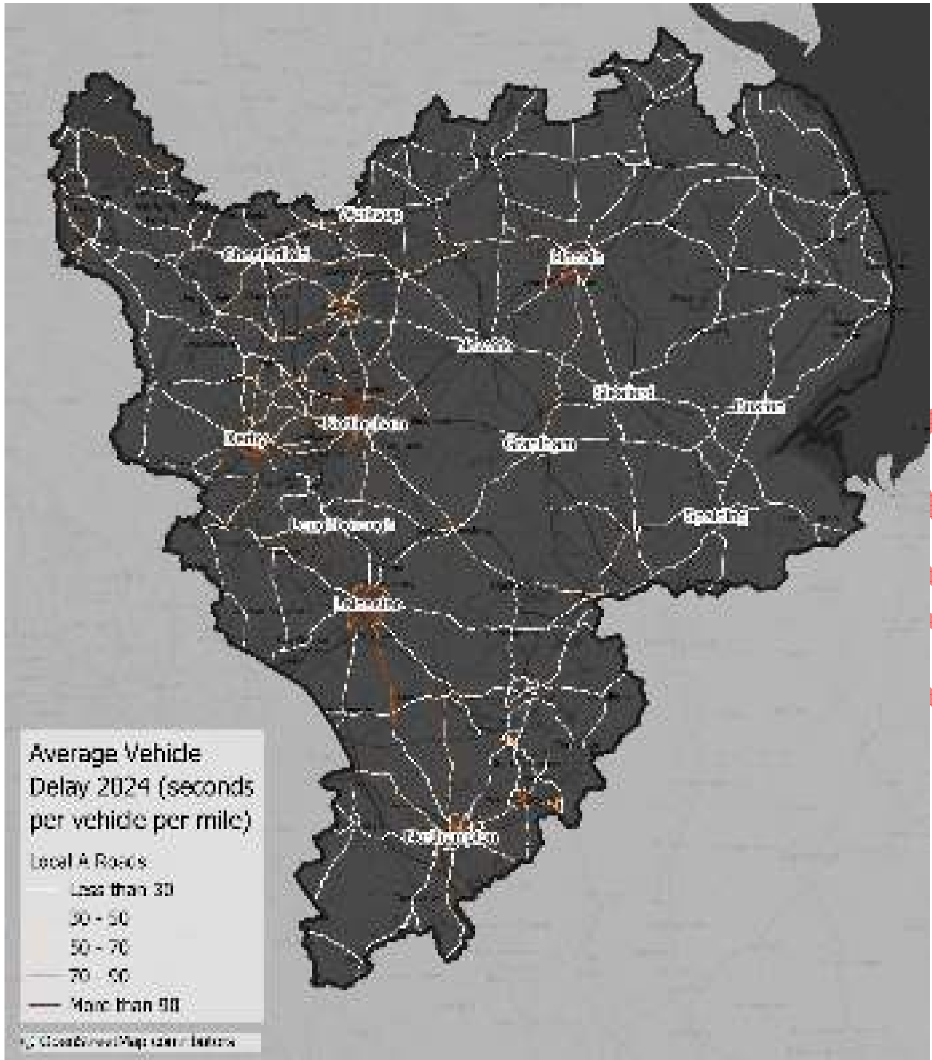
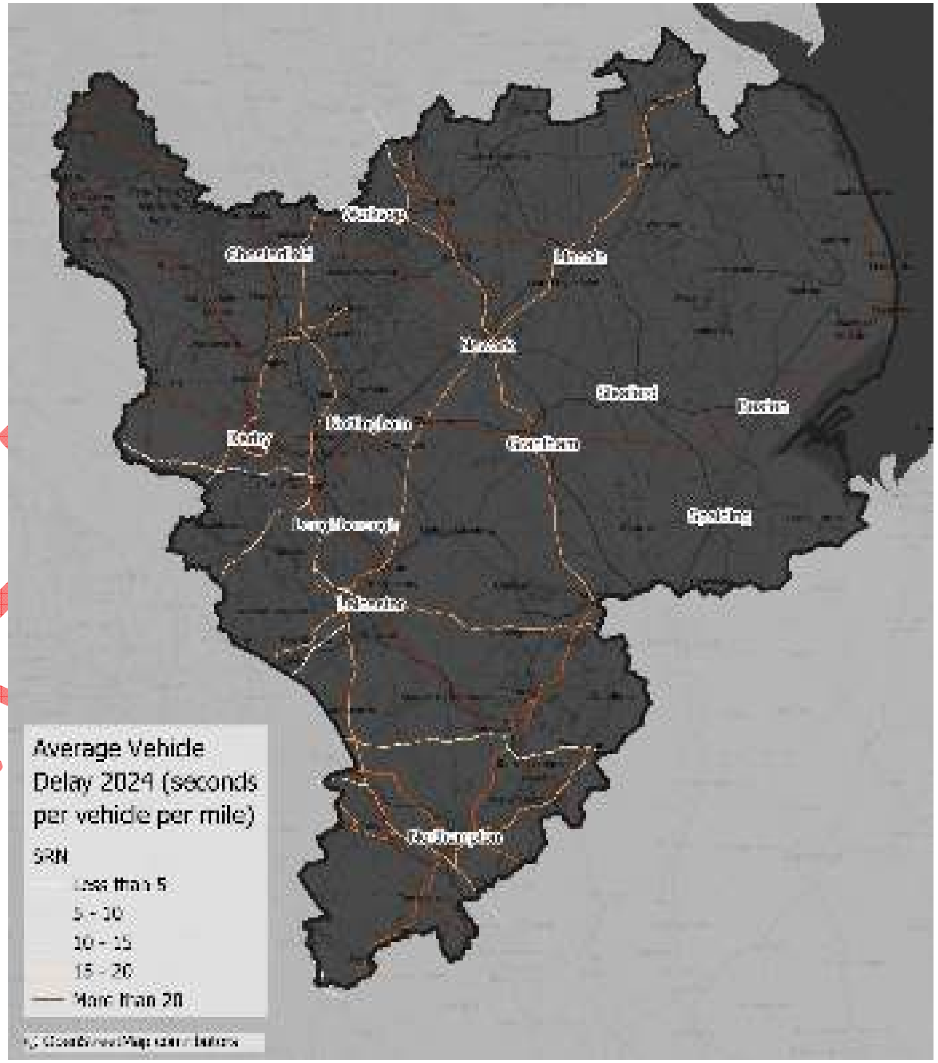


Figure 3. Proportion of freight vehicle kms out of total vehicle kms (DfT road traffic statistics

VEHICLE DELAY

[Narrative to add]





BUS PASSENGER JOURNEYS

[Narrative to add]

[Add in national comparisons]

Table 11. Bus passenger journeys per head (2024) (Department for Transport)

Local authority	Passenger journeys per head
Nottingham	126
Leicester	59
Derby	49
Nottinghamshire	28
West Northamptonshire	28
Derbyshire	23
Lincolnshire	17
Leicestershire	14
North Northamptonshire	11
Rutland	3

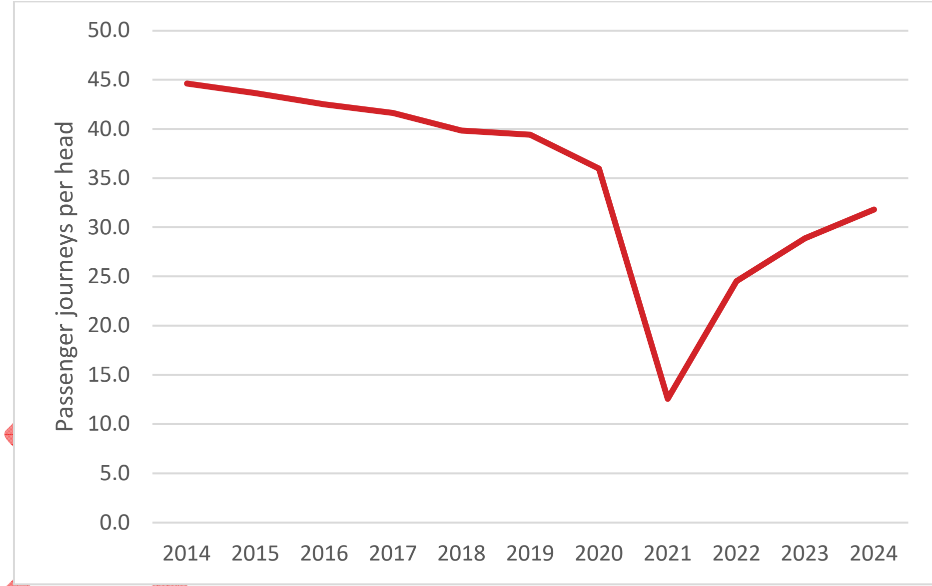


Figure 4. Bus passenger journeys per head in the East Midlands (Department for Transport)

RAIL PASSENGER JOURNEYS

[Narrative to add]

Table 12. Top 10 stations in East Midlands by entries/exits (2023/24)

Station	Entries/exits	Main origin or destination station
Nottingham	7.14m	London St Pancras International
Leicester	5.30m	London St Pancras International
Derby	3.50m	London St Pancras International
Northampton	2.63m	London Euston
Lincoln	2.06m	London King's Cross
Chesterfield	1.54m	Sheffield
Loughborough	1.29m	Leicester
Grantham	1.28m	London King's Cross
Kettering	1.06m	London St Pancras International
Newark Northgate	0.96m	London King's Cross

Table 13. Top 10 stations in East Midlands by % growth in entries/exits since 2013/14

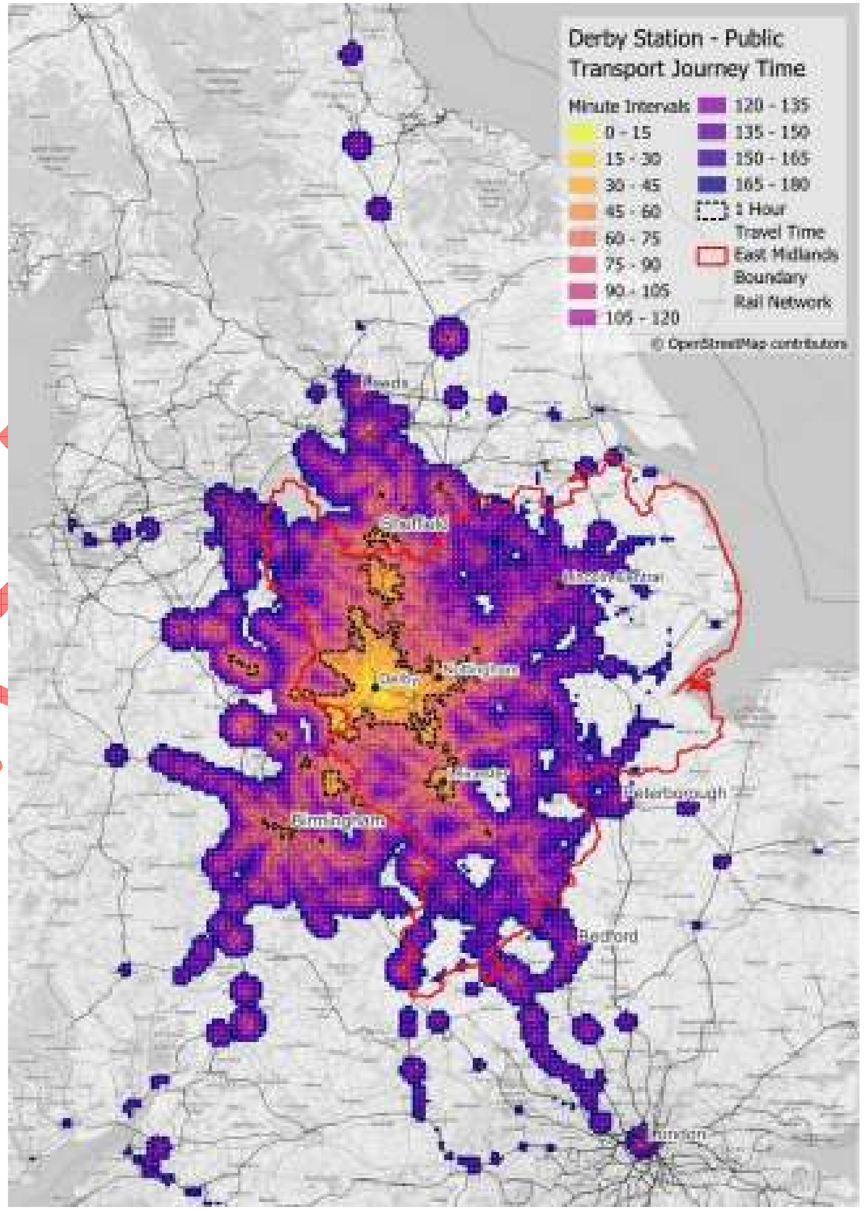
Station	Increase in entries/exits since 2013/14	% increase
Hykeham	117,006	292%
Rauceby	4,210	222%
Havenhouse	420	151%
Bamford	41,210	148%
Hubberts Bridge	472	141%
Newark Castle	308,514	128%
Collingham	62,808	113%
Carlton	22,822	112%
Burton Joyce	5,712	108%
Edale	75,308	107%

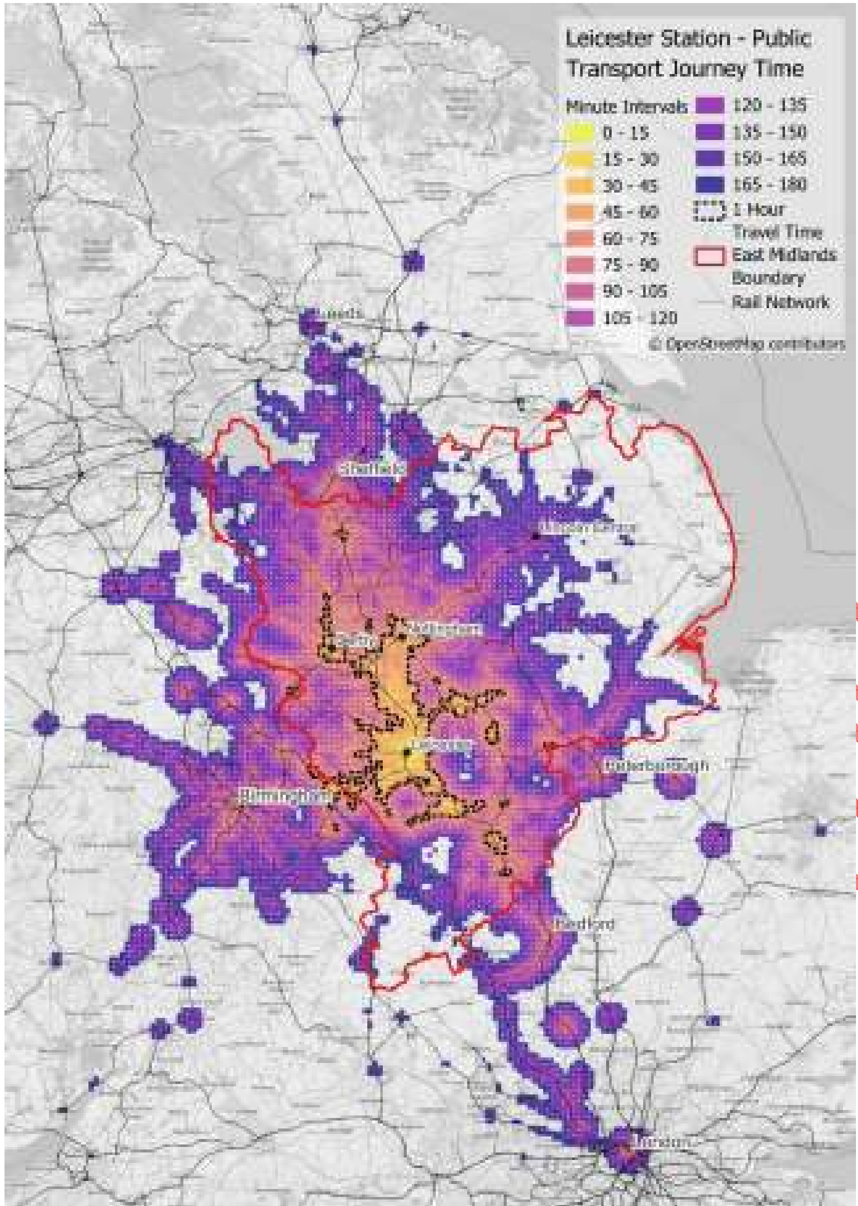
Table 14. Top 10 stations in East Midlands by absolute growth in entries/exits since 2013/14

Station	Increase in entries/exits since 2013/14	% increase
Nottingham	1.04m	17%
Lincoln	474,284	30%
Leicester	449,922	9%
Newark Castle	308,514	128%
Corby	242,786	95%
Hykeham	117,006	292%
Retford	114,670	27%
Market Harborough	84,708	11%
Grantham	80,047	7%
Edale	75,308	107%

PUBLIC TRANSPORT ACCESSIBILITY

[Narrative to add]




Leicester Station - Public Transport Journey Time
Minute Intervals
0 - 15
15 - 30
30 - 45
45 - 60
60 - 75
75 - 90
90 - 105
105 - 120
120 - 135
135 - 150
150 - 165
165 - 180
1 Hour Travel Time
East Midlands Boundary
Rail Network
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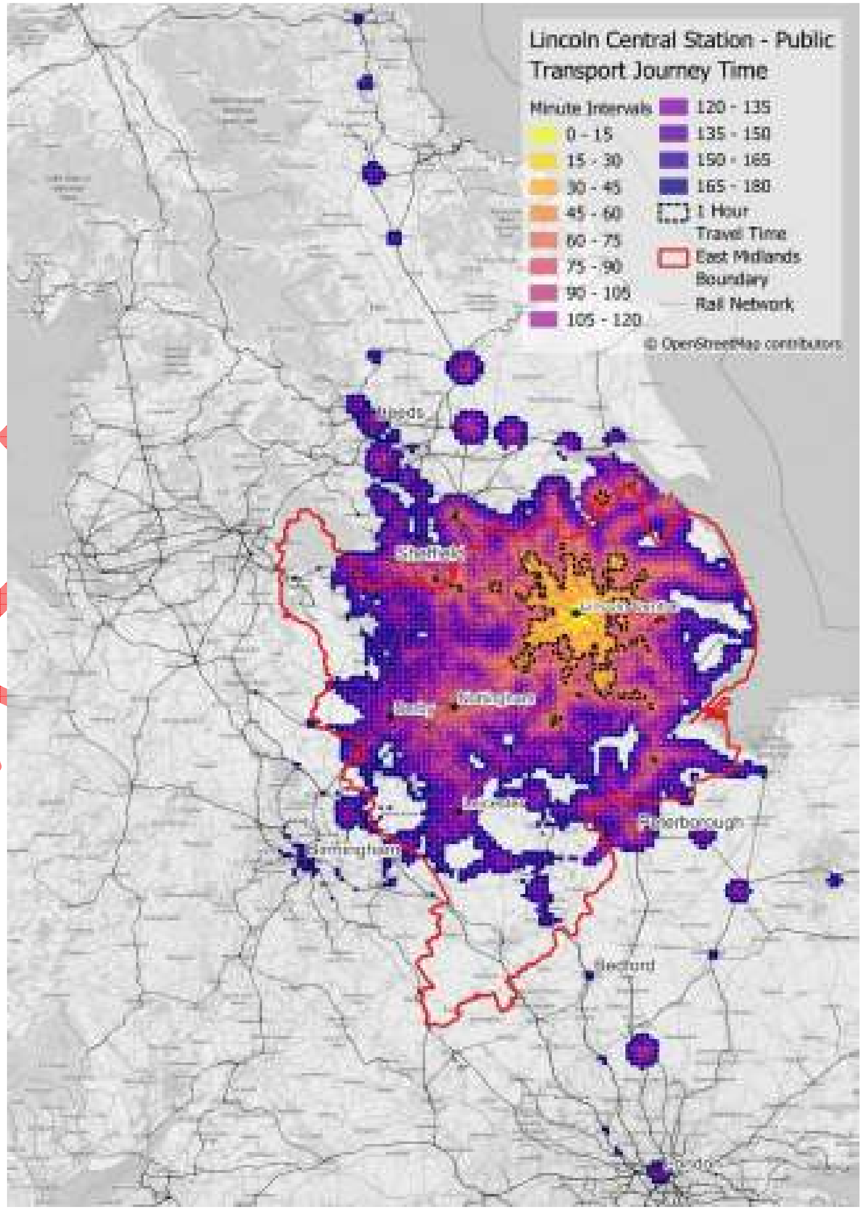
Sheffield
Nottingham
Derby
Leicester
Birmingham
Peterborough
Bedford
London


Lincoln Central Station - Public Transport Journey Time
Minute Intervals
0 - 15
15 - 30
30 - 45
45 - 60
60 - 75
75 - 90
90 - 105
105 - 120
120 - 135
135 - 150
150 - 165
165 - 180
1 Hour Travel Time
East Midlands Boundary
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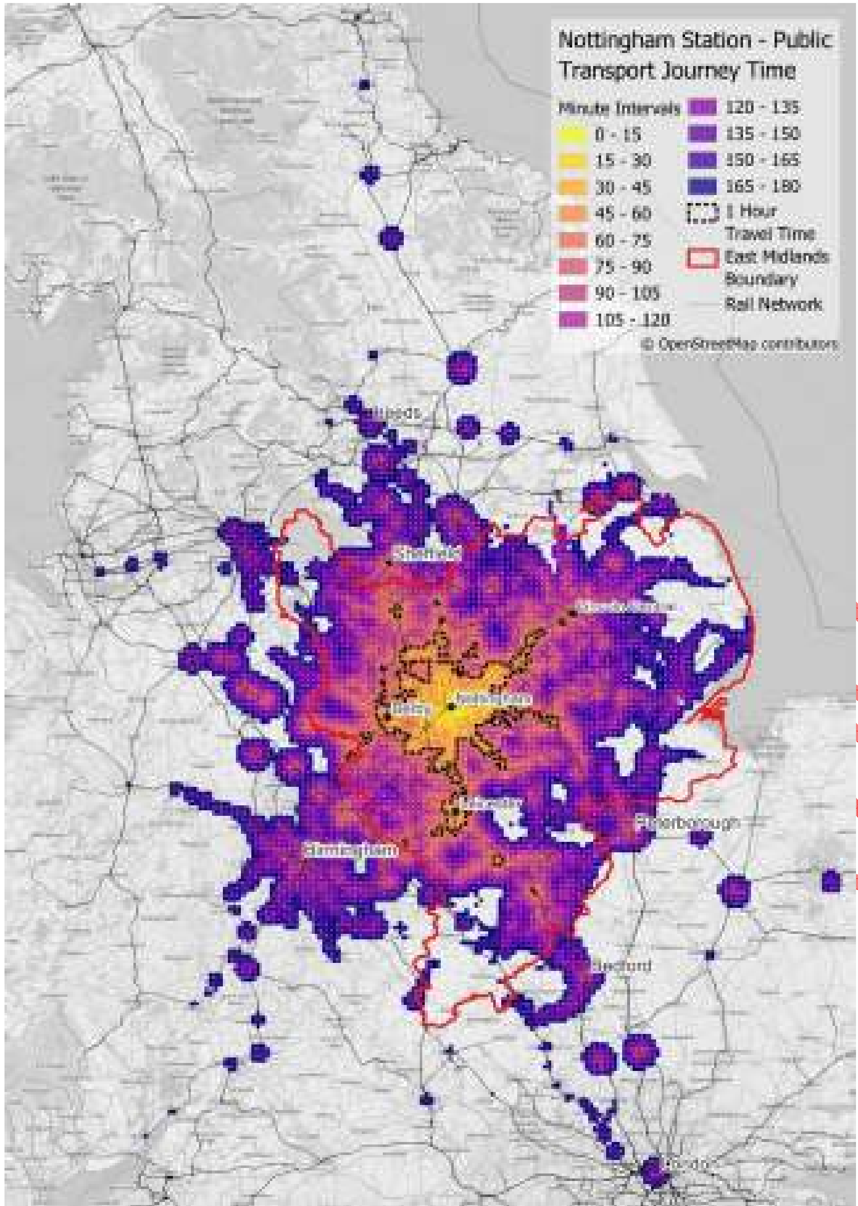
Nottingham Station - Public Transport Journey Time
Minute Intervals
0 - 15
15 - 30
30 - 45
45 - 60
60 - 75
75 - 90
90 - 105
105 - 120
120 - 135
135 - 150
150 - 165
165 - 180
1 Hour Travel Time
East Midlands Boundary
Rail Network
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WORKING DRAFT

5. INSIDE THE EAST MIDLANDS

5.1 Overview

Overarching map of the sub-regions, highlighting sub-regional specialities.

Recognise local transport plans - summarise what they have to say in common collectively about the region

Two page sections on each sub-region, with a zoomed-in, standardised map of each and supported by key information specific to the sub-region drawn from previous sections.

5.2 East Midlands Combined County Authority (EMCCA)

As noted previously, the EMCCA was the UK's first combined county authority and was created in 2024 involving the four local authorities of Derby, Derbyshire, Nottingham, Nottinghamshire.

Quick facts

Population:	2.26 million (2023)
Employed residents:	1.05 million
Workplace employment:	0.95 million
Economic activity (GVA):	£61.6 billion
GVA per worker:	£64,663
GVA per hour worked:	£38.23
Key sectors:	[xxx]

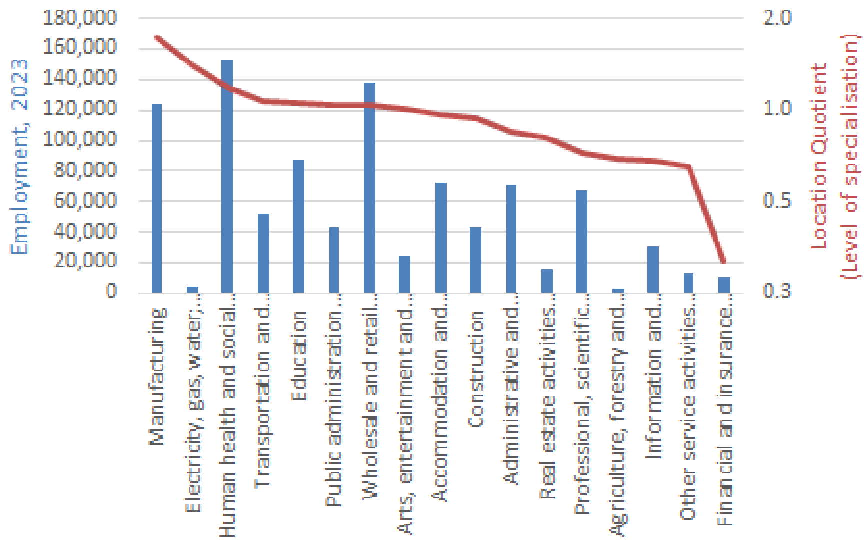
Geography

The central economic core of the subregion lies in the relatively flat region between the Peak District and Sherwood Forest. This economic heartland developed on coal seams and now contains the M1 corridor, the Midland Mainline, the Erewash Valley route and the Robin Hood Line.

[Etc. describing key features of the geography and elements pointed out on the map.]

Economy

The main sectors of the economy are health and social work, wholesale, retail and motor trades, and manufacturing. The economy is most specialised in manufacturing with nearly twice the share of manufacturing jobs as England as a whole – matching the specialisation pattern of the wider East Midlands.



[This is not quite the right chart, but something like this which can be drawn consistently for each subregion will form the anchor of the economy section]

Transport and connectivity

[xxx]

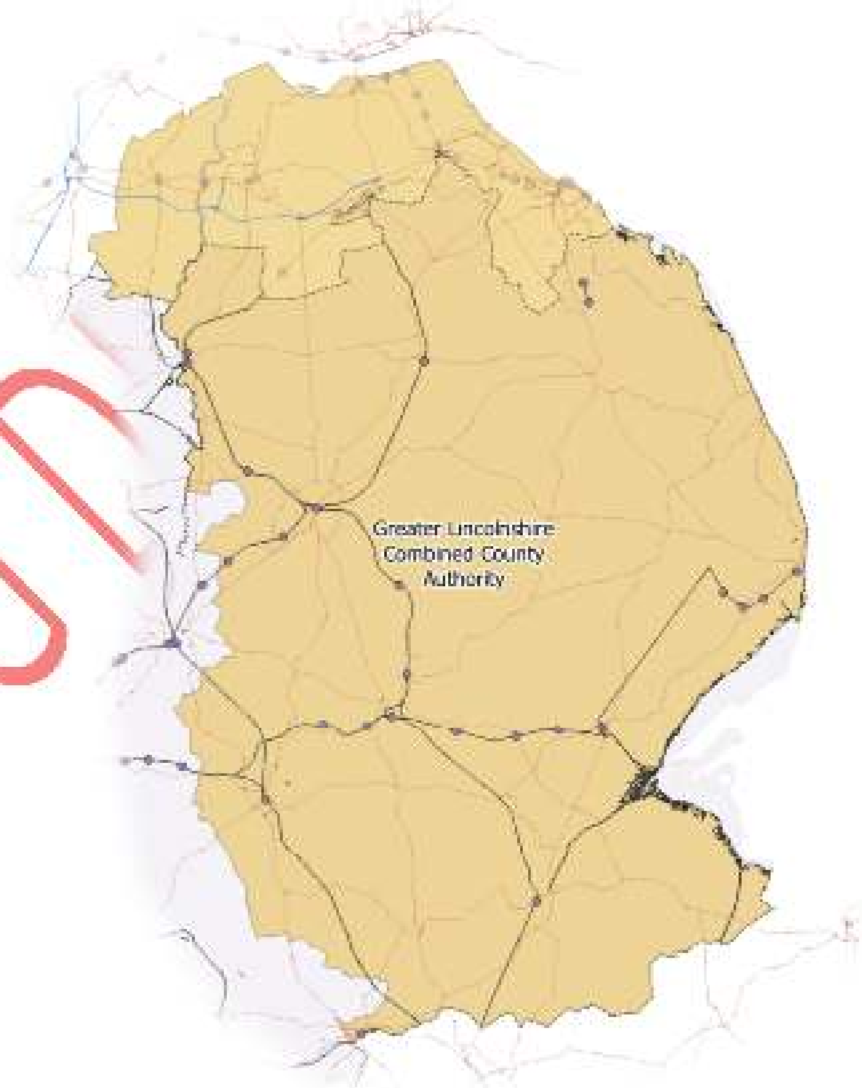
Key points….

5.3 Greater Lincolnshire Combined County Authority (GLCCA)

In 2023, a mayoral combined county authority was agreed for Greater Lincolnshire, comprising the local authority of Lincolnshire in the East Midlands, plus North East Lincolnshire and North Lincolnshire in Yorkshire and the Humber.

Quick facts

Population:	1.11 million (2023)
Employed residents:	0.49 million
Workplace employment:	0.43 million
Economic activity (GVA):	£28.9 billion
GVA per worker:	£66,771
GVA per hour worked:	£38.06
Key sectors:	[xxx]



Geography

Economy

[xxx]

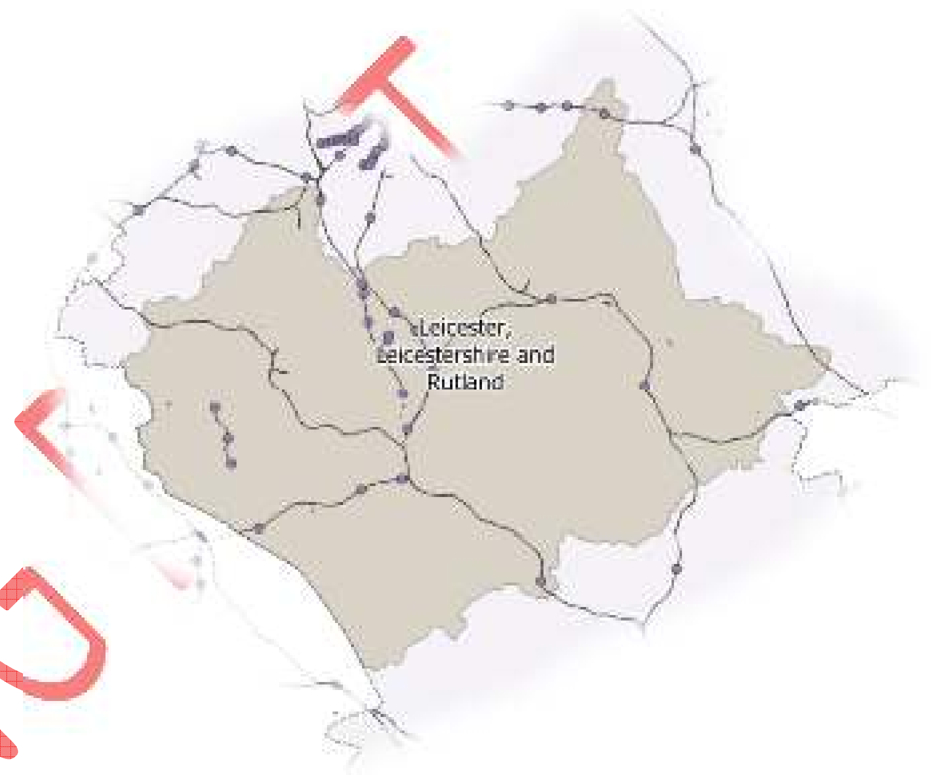
Transport and connectivity

[xxx]

Key points….

5.4 Leicester, Leicestershire & Rutland

The area covering Leicester, Leicestershire and Rutland currently lacks a devolution deal, although the three councils agreed in 2023 to enter into negotiations for a non-mayoral deal, which have yet to conclude.



Quick facts

Population:	1.16 million (2023)
Employed residents:	0.55 million
Workplace employment:	0.51 million
Economic activity (GVA):	£34.4 billion (2023)
GVA per worker:	£67,532
GVA per hour worked:	£38.23
Key sectors:	[xxx]

Geography

Economy

[xxx]

Transport and connectivity

[xxx]

Key points….

5.5 North Northamptonshire and West Northamptonshire

The two unitary authorities of North and West Northamptonshire do not currently have a devolution settlement. As an alternative to a future deal between the two East Midlands authorities, there has been a potential option mooted to include the neighbouring authorities of Bedford, Central Bedfordshire, Luton and Milton Keynes within a wider 'South East Midlands' combined authority.

Quick facts

Population:	0.81 million (2023)
Employed residents:	0.40 million
Workplace employment:	0.36 million
Economic activity (GVA):	£24.6 billion (2023)
GVA per worker:	£67,456
GVA per hour worked:	£37.61
Key sectors:	[xxx]

Geography

Economy

[xxx]

Transport and connectivity

[xxx]

Key points….

6. KEY THEMES AND INSIGHTS

Potential for separate chapters on key emerging themes, to be drawn out of the data and policy context. Need for these chapters depends on depth of analysis of earlier chapters and how strongly these themes have been already brought out. E.g.:

6.1 Strengths and opportunities?

e.g. freight and logistics, future economic drivers, regional/sub-regional strengths

6.2 Transport and connectivity constraints?

6.3 Future priorities/principles for success?

7. CONCLUSIONS

- *Summarise key headlines which can be any of: Opportunities, threats, open questions, problem statements*
- *This is where we can put a press release headline point such as "Opportunity to grow GVA by £xxxx by 2050 if invest in EM transport" (OR something similarly eye catching but with a basis)*

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OTHER LOCATIONS:

France:
Bordeaux, Lille, Lyon, Marseille, Paris

Northern Europe:
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Asia Pacific:
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Africa:
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Australasia
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Latin America:
Belo Horizonte, Belém, Bogotá, Lima, Medellin, Mexico, Rio de Janeiro, Santiago, São Paulo

North America:
Bloomfield, Chicago, Los Angeles, Montreal, Newark, New-York, Philadelphia, Sacramento, San Francisco, Toronto, Washington

Transport for the East Midlands
15th December 2025
Item 6: Shared Priorities Update

1. Introduction

1.1 This report provides a status update on the TfEM-Midlands Connect Shared Priorities, last updated in 2024 and available at: Our Shared Vision for the East Midlands Our Shared Vision for the East Midlands

2. Status Update as of December 2025

2.1 A progress update against all eight priorities is set out below.

Full Electrification of the Midland Main Line

2.2 Following the termination of original electrification scheme at Bedford back in the early 1980s, the proposal to extend northwards through the East Midlands to Sheffield was given the go-ahead by Government in 2012, paused in 2015, reinstated then cancelled in 2017 and again reinstated in 2021. During this time, electrification was initially extended to Corby/Kettering, then Market Harborough and then South Wigston. The wires south of Bedford were also upgraded from 100mph to 125 mph in anticipation of new Aurora 810 bi-mode rolling stock being introduced in 2025.

2.3 A Full Business Case decision was expected in mid-June 2024 on proposals to electrify through Leicester to Trent Junctions (south of Nottingham) and for detailed design to Nottingham, Derby, Chesterfield and Sheffield. In anticipation of this TfEM coordinated a letter of support from key political and business leaders across the north and midlands, including the Chair of TfEM and the EMCCA Mayor.

2.4 EMR also developed a business case to transition to a new fleet of regional battery-electric regional rolling stock to replace the existing fleets of c170, c360 and c158 trains in due course.

2.5 However further electrification was 'indefinitely paused' by DfT following the Spending Review and the East Midlands will remain the most 'diesel dependant' railway region in the UK for the foreseeable future.

Improved Rail Connectivity between Nottingham, Leicester, and Coventry

2.6 Midlands Connect launched a revised Strategic Outline Business Case (SOBC) for the project in Coventry of the 28th of February with the Chair of TfEM, the Leader of Coventry City Council and a number of MPs (mc-publications-design-breaking-down-barriers-v3.pdf).

2.7 Subsequent work led by Network Rail has confirmed that the cost of progressing to Outline Business Case would be in the region of £5m, although as yet there has no financial commitment from Government though the Rail Network Enanacement Pipeline (RNEP) towards the scheme.

Improved Rail Connectivity between the Midlands, Leeds, and the North East

2.8 Following the cancellation of HS2 East the Government has initiated the Midlands to Yorkshire & the North East (MYNE) Study to consider lower cost options for improving rail connectivity along the former Eastern Leg corridor.

2.9 Initial work has focussed on the costs and benefits of serving the East Midlands through making use if redundant platform capacity at the new Birmingham Curzon Street Station under construction, compared to the delivery of Midlands Rail Hub (MRH) East. A programme-wide business case for Midlands Rail Hub (including benefits for the East Midlands) is nearing completion.

2.10 A decision about how (if at all) to take this work forward has yet to be made by Ministers.

Improvements on the A46 Growth Corridor including delivery of the A46 Newark Northern Bypass

2.11 The Development Consent Order (DCO) for the A46 Newark Northern Bypass was approved in October 2025 and the Government confirmed in the Spending Review that funding is available to deliver the scheme. However, as yet no start date has been confirmed and there is concern that this could slip from the previously published date of 2027. As a result, the Chair of TfEM and the Chair of EMC wrote to the Secretary of State highlighting the need to expedite the scheme. The exchange of correspondence is set out in Appendix 1.

2.12 In relation to the Castle Line (Lincoln-Newark-Nottingham), at present there has so far been no DfT funding identified to deliver the line speed improvement scheme promoted by Midlands Connect (All change: The Castle Line).

2.13 However, EMR is set move to a half hourly service between Lincoln, Newark and Nottingham on the 14th December 2025 as part of the 'Project Abraham' timetable enhancements, which will add an extra 2,000 seat a day along the route.

2.14 TfEM and GLCCA highlighted the strategic importance of this this rail corridor in the recent 'Keeping Pace' publication: Keeping Pace: Enhancing Lincoln City's Rail Connectivity.

Improvements to the A50/A500 Growth Corridor

2.15 Derbyshire County Council is continuing to progress a LUF funded access road from the A50 to the East Midlands Intermodal Park adjacent to Toyota's manufacturing facility. However, any further strategic improvements to the corridor in the East Midlands will require funding through the RIS3 process (2025-2030), which will be confirmed by March 2026.

Improvements to the A5 Growth Corridor

2.16 Although National Highways have undertaken work to develop a strategic enhancement to the A5 between the M69 and the M42 (Hinckley and Tamworth), delivery of any scheme will need to be funded through RIS3. The same is true for the improvement to the junction between the A5 and A426 at Gibbet Hill identified by Midlands Connect and the roundabout at Dodwells – although both these schemes appear small enough to have a chance of delivery.

Improving safety and reliability on the A1

2.17 National Highways has delivered a programme of improvements to road signage and lane markings along the route in the East Midlands. In addition, National Highways is progressing an initial phase of eight 'gap closures' along the route to improve safety and consistency with the rest of the SRN. However, there are currently no plans to develop any strategic enhancements for delivery in RIS3.

Improving capacity around the M1 Junction 24

2.18 National Highways has commissioned a strategic study to assess options for increasing capacity along the M1 between Junction 23a and Junction 25 of the M1 to accommodate planned growth, including that arising from the Freeport. However, delivery of any infrastructure improvements though the RIS process are unlikely before the early 2030s.

2.19 The Freeport has been engaging with a consortium of local developers to progress a private sector solution to allow some development to progress. Segro has commenced statutory public consultation on a Development Consent Order Application for an expansion on its operations at the East Midlands Gateway Freight

Interchange which includes proposed improvements to M1 Junction 24: consultation-leaflet.pdf.

3 Recommendations

3.1 Members are asked to note progress on the eight shared priorities and direct officers accordingly.

Key Contact:
Andrew Pritchard
andrew.pritchard@emcouncils.gov.uk

Transport for the East Midlands

East Midlands Councils

Secretary of State for Transport
Department for Transport
Great Minster House
33 Horseferry Road
London
SW1P 4DR

9th October 2025

Sent by email

Dear Secretary of State

DELIVERY OF THE A46 NEWARK BYPASS

We are delighted that the Spending Review confirmed funding for the A46 Newark Bypass and that the necessary Development Consent Order has now been issued.

As you will be aware, the scheme is vital not just to the town of Newark-on-Trent, it forms a key part of a wider 'trade corridor' linking the Humber Ports and East Midlands Freeports with key cities across the Midlands, and with the A1.

Consequently, the A46 Newark Bypass has been TfEM's top strategic road investment priority for the last decade.

With all the key elements now in place, we are keen to secure prompt delivery by National Highways of this long overdue scheme.

The last published estimated start date was 2027 with completion within the RIS3 period. It is vital that this timetable is not allowed to slip. Any delay will lead to further cost increases and traffic congestion and undermine delivery of planned large-scale housing and employment development across the East Midlands.

The indefinite 'pausing' of Midland Main Line Electrification was a bitter blow for the region and the latest Treasury figures published this July confirmed that the East Midlands remains rooted to the bottom of the league table for transport investment - just 54% of the UK average per head.

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Turning this situation around after years of neglect by successive Governments will take time.   As we hope that you will agree, kickstarting delivery of the A46 Newark Bypass represents an essential first step.

Yours sincerely

Sir Peter Soulsby
Chair of Transport for the East Midlands

Cllr Sean Matthews
Chair of East Midlands Councils

Copied to: James Naish MP (Rushcliffe), Chair of the All Party Parliamentary Group for the East Midlands

Department for Transport

From the Parliamentary
Under Secretary of State
Simon Lightwood MP

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Web site: www.gov.uk/dft

Our Ref: MC/00050709

Sir Peter Soulsby
Chair of Transport for the East Midlands

Councillor Sean Matthews
Chair of East Midlands Councils

14 November 2025

Dear Sir Peter and Councillor Matthews,

Thank you for your letter of 9 October to the Secretary of State regarding the A46 Newark Bypass scheme. I am responding as the Minister responsible for this policy area.

I appreciate and acknowledge your comments on the importance of the A46 Newark Bypass, not only for Newark-on-Trent, but also as a vital part of the wider 'trade corridor' linking the Humber and East Midlands Freeports with key cities across the Midlands.

Following the Spending Review, the Secretary of State announced on 8 July 2025 that the government has set aside funding for the A46 Newark Bypass scheme. As you note, the necessary Development Consent Order has now been granted.

We continue to work with National Highways to identify the most efficient cost and delivery timelines, more information on delivery will be available as part of next year's RIS3 publications.

Looking ahead, I can assure you the Government remains committed to maintaining and renewing the road network to ensure that it works for all residents and businesses who use it.

Thank you again for taking the time to write to the Secretary of State about the A46 Newark Bypass scheme.

Yours sincerely,

SIMON LIGHTWOOD MP
MINISTER FOR ROADS AND BUSES