

UKTRAM Light Rail at a Turning Point

Helping turn National ambition into reality
James Hammett – Managing Director



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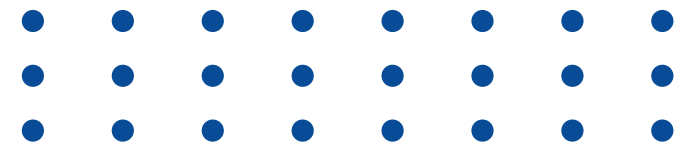


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INTRODUCTION

UKTram is the recognised trade body and authoritative voice for the light rail sector in the British Isles. As a not-for-profit membership organisation, it represents all light rail and other guided transport systems across England, Wales, Scotland, Ireland and the Isle of Man.



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UKTram's Remit

UKTram covers the need of our members across all aspects as listed below:

- Promoting Trams, Light Rail, Metro's, VLR & Other Guided Transport Systems
- Government Lobbying & Liaison
- Group and Industry Best Practice
- Centre of Excellence
- Training, Competency and Development
- Knowledge & Experience transfer & sharing
- Academic Development & Training
- European & International Liaison
- Innovation
- Research and Development

Light Rail Safety and Standards and looked after under the remit of our Sister Company, the Light Rail Safety and Standards Board (LRSSB).



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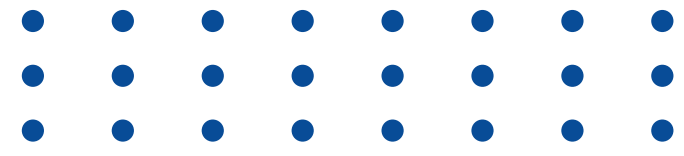
UK Position

- **Transport policy** is undergoing a fundamental shift toward integrated, outcome-led systems rather than modal silos.
- **Light rail sits at the centre** of this transition, not as a mode, but as a system enabler
- Record Government Investment
- **However**, ambition is not yet translating into delivery



Positively Positioned





Investment overview

Light Rail Investment Overview (UK & Ireland) – 2026 Snapshot

- Over £8bn of devolved and national transport funding is now influencing light rail development, but effective deployment depends on scheme readiness and delivery capability.



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Investment Snapshot



- 1) West Midlands Metro - Fully funded extensions (295m+) via CRSTS & WMCA
- 2) Manchester Metrolink - CRSTSbacked pipeline; tram -train under development
- 3) Sheffield Supertram - CRSTS supporting tram -train expansion and innovation
- 4) Tyne & Wear Metro - £362m+ fleet replacement & upgrade programmes
- 5) Docklands Light Railway - £900m fleet & £1bn+ Thamesmead extension (planned)
- 6) London Tramlink - Fleet renewal within constrained TfL funding
- 7) Nottingham Tramlink - New devolved funding unlocking future expansion
- 8) Blackpool Tramway - £23m extension delivered; further options unfunded
- 9) Edinburgh Trams - £200m+ Newhaven extension delivered; future pipeline
- 10) Glasgow Metro (SPT) - £2bn+ long -term programme (early development)
- 11) LUAS Dublin - €500m+ capacity upgrades via NTA & Green Line Extension



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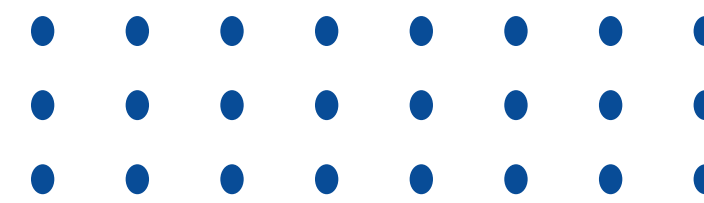
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From Modes to Systems



DfT Better Connected Strategy (2026):

- Integration, reliability, accessibility, decarbonization

Shift to:

- Seamless journeys
- Place-based growth
- Outcome -driven investment



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»»»» The Sector Challenge ««««



The Gap Between Ambition and Delivery

Core Issue: The sector struggles to convert ambition into funded, deliverable schemes

Barriers: Fragmented funding, Weak scheme pipeline, Limited local delivery capability, Complex approvals (TWAO, business case attrition).



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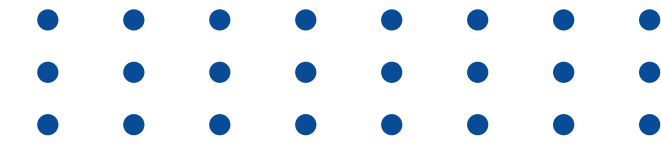
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UKTram's Strategic Position



Shift in Positioning:

- Not: 'Promoting trams'
- But: 'Supporting integrated, high -capacity, reliable urban transport systems'

Core Capabilities:

- System integration expertise
- Centre of Excellence
- Knowledge and innovation leadership
- Cross-sector convening power



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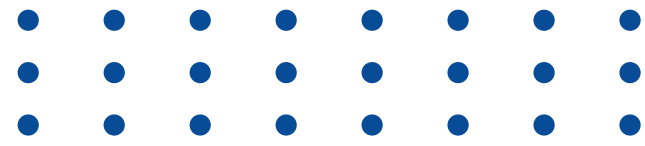


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Enabling Smarter Investment

UKTram Role:

Supporting DfT & Treasury through:

- Evidence-based business cases
- Pipeline development
- Value-for-money frameworks



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Strengthening Local Delivery Capability

Challenge:

Only ~54% confidence in delivery capability
(UK context)

UKTram Solution:

Centre of Excellence:

- Business case support
- Scheme development guidance
- Best practice dissemination

Ensuring Devolved Funding is Spent Wisely



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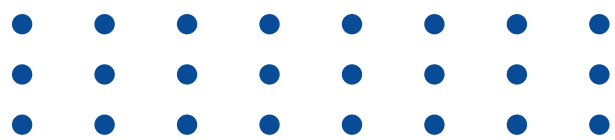


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Strategic Priorities Moving Forward

Five Priorities:

- Strengthen scheme pipeline
- Improve funding models
- Build local capability
- Embed innovation systems
- Align with integrated transport policy



The Strategic Opportunity

Key Message:

- The UK light rail sector has never been more aligned with national policy
- but alignment without delivery is wasted opportunity.

UKTram's role is to:

- Bridge policy and delivery. Enable smarter investment. Help deliver integrated, high -capacity transport



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THANK YOU



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