

## **Airports Commission – Proposal for providing additional airport capacity in the longer term**

### ***Response by Kent County Council endorsed by Medway Council***

#### **Summary**

Kent County Council (KCC) and Medway fully support growth in UK aviation in order to improve the UK's connectivity and competitiveness thus supporting economic growth and job creation<sup>1</sup>. KCC and Medway advocate that the best solution to the UK's aviation hub needs in the longer term is to utilise, improve and expand existing airports. Provision of additional capacity at some existing airports, together with improved surface access by rail will facilitate better strategic use of the London/South East multi-airport system.

A 'dispersed hub' model or 'airport systems' approach will deliver the UK's connectivity requirements, provide much needed suitable capacity and could be delivered within the shortest possible timescale. Better utilisation of regional airports such as Kent's International Airport at Manston, Lydd Airport and Southend Airport, for point to point flights, will also release extra capacity and complement the main London airports that provide 'hub' operations.

KCC and Medway are of the belief that there is no sound evidence for a new hub airport in the Thames Estuary or off the Kent coast. There are many economic, social and environmental reasons against such a development; one of which would be the forced closure of Heathrow and the devastating impact this would have on the west of London economy. This would be harmful to the UK's global connectivity and be to the detriment of the national economy.

In KCC's previous submission to the Airports Commission on how to make the best use of existing airport capacity in the short and medium term, we outlined the significant spare capacity at the London airports of Stansted and Luton, and the significant potential for growth at the South East's regional airports of Southend, Manston and Lydd in Kent. There is also the potential for Birmingham airport to serve the London and South East market, especially with High Speed 2 (HS2) rail from 2026. We estimated that there is spare capacity for around 60 million passengers per annum (mppa) within the existing airport system in the short term; and the potential to increase this to its theoretical maximum of 112mppa in the medium term, using existing runways. Immediate action is also needed to correct the UK's competitive disadvantage in terms of Air Passenger Duty (APD).

In the longer term, with the additional runways outlined in this submission, we estimate that 210mppa could be accommodated by the existing London airports; and this could be increased to 280mppa if Birmingham Airport serves

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<sup>1</sup> 'Bold Steps for Aviation', Kent County Council, May 2012 with revisions July 2012, <https://shareweb.kent.gov.uk/Documents/News/Bold%20Steps%20for%20Aviation%20May%202012.pdf>

the London/South East market with HS2 connection. With better utilisation of regional airports in the South East and the applicable short and medium term measures to increase capacity at existing airports; system wide capacity is 318.5 million passengers per annum. This additional capacity and the connectivity that it provides, would meet the UK's aviation needs without a new hub airport and can be delivered in a much shorter timescale, as in the interests of the national economy the need to act is now.

KCC and Medway welcome the Airports Commission's call for proposals for providing additional airport capacity in the longer term and advocate the following strategic approach to providing the UK's aviation connectivity needs:

- Immediate action and a long term commitment to keep UK airports competitive with European airports in terms of Air Passenger Duty (APD). This currently has a negative impact on the UK's global connectivity and is therefore damaging UK business and tourism; especially to long haul and emerging economies as the UK loses out to its European competitors.
- A second runway at Gatwick to be delivered soon after the 2019 planning agreement ends. Gatwick is approaching its capacity limit for a single runway airport and additional runway and terminal facilities in the mid 2020s will allow the airport to grow and compete as a 'hub' airport with Heathrow; therefore providing increased long haul connectivity for the UK.
- A second runway at Stansted to be delivered when the need arises, most likely in the 2030s when all London airports (with their current capacity) are forecast to be full.
- Encouragement of competition between the London airports of Heathrow, Gatwick and Stansted, each with two runways, so that a 'dispersed hub' model with a total of six runways spread across the London multi-airport system provides resilience, improved choice, better value and convenience for passengers.
- Consideration of a second runway at Birmingham Airport if the need arises, as a way of relieving demand on the London airports. The delivery of HS2 by 2026 will bring Birmingham Airport within 38 minutes of London.
- Better utilisation of regional airport capacity in the South East at Southend, Manston and Lydd airports in Kent, for point to point flights, complementing the main London airports that provide hub operations.
- Improved rail connectivity to airports to create an integrated air-rail transport system for London and the South East that facilitates sustainable surface access to the growing airports; and provides the potential for better integration of the London/South East multi-airport system.
- UK airports able to compete with European airports for global aviation with internationally agreed carbon emission limits that apply equally to all countries, therefore not disadvantaging the UK.

This submission is at a high level looking at the merits of a strategic approach to airport capacity. It satisfies the Airports Commission's sift criteria for long term options; although it is anticipated that individual airport operators in their own submissions will comprehensively assess all the factors in the Airports Commission's Guidance Documents for any proposed capacity increases at their individual airports.

To assist with our analysis for this submission, KCC commissioned research from the specialist aviation consultancy, Alan Stratford and Associates Ltd (ASA). Our submission in part contains extracts from their reports<sup>2</sup>, although all recommendations given are those of KCC and not necessarily those of ASA.

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<sup>2</sup> ‘Examination of possible short and medium term options to improve capacity at UK airports’, Alan Stratford and Associates Ltd, May 2013; and ‘Examination of possible long term options to improve capacity at UK airports’, Alan Stratford and Associates Ltd, June 2013

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## Immediate action and a Long term commitment to keep UK airports competitive with European airports in terms of Air Passenger Duty (APD)

Table 1 shows the difference between APD for flights from the UK from 1 April 2013 as compared to other airports in Germany and the Netherlands.

**Table 1 Comparison of APD – UK, Germany and the Netherlands**

From	To Band A destinations - up to 2,000 miles, e.g. Europe		To Band B destinations - 2,001 to 4,000 miles, e.g. northern Africa, Middle East, North America		To Band C destinations - 4,001 to 6,000 miles, e.g. southern Africa, Caribbean, South America, India, Far East – India, China		To Band D destinations - over 6,000 miles, e.g. Australia, New Zealand	
	Reduced rate (lowest class)	Standard rate (any other class)	Reduced rate (lowest class)	Standard rate (any other class)	Reduced rate (lowest class)	Standard rate (any other class)	Reduced rate (lowest class)	Standard rate (any other class)
UK*	£13	£26	£67	£134	£83	£166	£94	£188
Germany**	To Europe, Russia, parts of northern Africa		To northern and central Africa, Middle East		To the rest of the world			
	€7.50 (£6.41)		€23.43 (£20.03)		€43.18 (£36.91)			
Netherlands***	Abolished APD							

\*source: Notice 550 Air Passenger Duty, March 2013, HM Revenue and Customs

\*\*source: [http://en.wikipedia.org/wiki/German\\_air\\_passenger\\_taxes](http://en.wikipedia.org/wiki/German_air_passenger_taxes) (accessed 22/05/13) and converted to £sterling at XE Currency Converter ([www.xe.com](http://www.xe.com)) on 23/05/13

\*\*\*source: <http://www.atab.org.uk/our-campaigns/air-passenger-duty/> (accessed 22/05/13)

Table 1 shows that APD in Germany is considerably lower than in the UK. The Netherlands after a period of APD increases decided to abolish the tax. The result is that with significantly lower taxation; flights to and from Amsterdam and Frankfurt are more attractive to business and leisure passengers than Heathrow. It is especially the case to and from long haul destinations where the difference in APD is most pronounced. Many of the world's emerging economies are long haul and UK needs to improve its connectivity to these destinations. The net result is that UK business and tourism are negatively impacted, with inbound passengers lost to other European countries and outbound passengers either paying higher air fares or being deterred from travel.

A report by Parsons Brinckerhoff (2012) into 'Greater South East Airport Capacity' for the South East Local Enterprise Partnership (SELEP) states that according to World Travel Tourism Council, 91,000 jobs are being lost in the UK each year due to high APD and argue that by removing the tax it would result in £4.2 billion added to the economy within twelve months. Parsons Brinckerhoff agree that by reducing or removing the tax it would put the UK

back on an even footing with our European competitors and lead to a rise in seat availability<sup>3</sup>.

Correcting the UK's competitive disadvantage compared to its European competitor airports in regards to APD needs to be done immediately as urged in Kent County Council's submission to the Airports Commission on short to medium term measures. There also needs to be a long term commitment to keep APD in the UK competitive with Europe so that we do not continue to lose business to our European rivals. This issue, which significantly impacts on the cost of air travel, needs to be addressed along with the UK's airport capacity disadvantage compared to European hub airports.

### **Recommendation**

**Kent County Council recommends that the Government acts immediately and makes a long term commitment to keep UK airports competitive with European airports in terms of Air Passenger Duty (APD). APD currently has a negative impact on the UK's global connectivity and is therefore damaging UK business and tourism; especially to long haul and emerging economies as the UK loses out to its European competitors.**

### **Second Runway at Gatwick**

In 2012, Gatwick Airport handled some 34.2 million passengers with a total of some 240,000 air transport movements (ATMs). It is the second largest airport in the UK with almost twice the traffic levels of the third and fourth airports, Manchester and Stansted.

Whilst there is some slot availability in off-peak times, the airport is at capacity for much of the day. During such periods, the only option for increased passenger throughput is through the use of larger aircraft, although this may not be economically viable for airlines. It is the busiest single runway airport in the world and the airport's estimate of its absolute capacity, which would be reached in the mid-2020s, is around 45 million passengers per annum. Until 2011, Gatwick was part of BAA plc, however, following an investigation by the Competition Commission, the airport was sold to Global Infrastructure Partners (GIP), a US-based private equity company specialising in the infrastructure sector.

In 1979, the then British Airports Authority (which subsequently became BAA plc) signed an agreement with West Sussex County Council (WSSCC) under which the airport operator undertook not to construct a second runway at Gatwick before 2019. As such, it was analysed but not taken further in the South East Regional Air Services (SERAS) second edition study in 2003<sup>4</sup>,

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<sup>3</sup> 'Airport Study for the South East Local Enterprise Partnership: Research Study – Greater South East Airport Capacity', Parsons Brinckerhoff, May 2012

<sup>4</sup> 'The Future Development of Air Transport in the United Kingdom: South East. 2<sup>nd</sup> Edition', Department for Transport, February 2003

which led to the White Paper, 'The Future of Air Transport in the UK' (2003)<sup>5</sup> which recommended new runways at both Heathrow and Stansted.

Despite this, Gatwick Airport's Interim Master Plan (2006)<sup>6</sup> dealt in some detail with a scenario in 2030 in which Gatwick would be enlarged with a second runway and full range of supporting airport facilities, whilst recognising the 2019 legal constraint. Two possible options were considered; a narrow spaced and a wide spaced runway to the south of the existing runway; with the wide spaced runway the more preferable option. As such, BAA plc took measures to safeguard the relevant land against possible development.

Under its current ownership by GIP, in their 2012 Master Plan<sup>7</sup>, Gatwick Airport stated that they had no current plans for a second runway and reiterated that they were fully committed to the 1979 legal agreement with WSCC precluding the construction of a new runway before 2019. Nevertheless, while the focus of the 2012 Master Plan was firmly on improving the existing single runway airport, they believed that there was a possibility that a second runway may be needed sometime in the future. Gatwick Airport would therefore continue to safeguard land for future expansion because they believe it to be sensible business practice.

Since the publication of the 2012 Master Plan, Gatwick has formally declared its intent that it plans to provide detailed evidence to the Airports Commission on its case for a second runway. Gatwick's CEO, Stuart Wingate, has also presented its case to the House of Commons Transport Select Committee<sup>8</sup> as part of its inquiry in the options for new airport capacity in the UK. It should however be noted that there is currently little information on the airport's latest plans in the public domain so further assessment will be needed by the Airports Commission.

### Runway Layout Options

The current preferred option is a wide spaced runway to the south of the existing runway with a least 1,035 metres between the two runways. Whilst both a narrow spaced second runway would be preferable to a wide spaced runway on environmental grounds, it would not provide the full capacity benefits given by independent mixed mode operations, when both runways can handle a combination of arriving and departing aircraft. This separation is, however, relatively narrow when compared to other airports, for example, the current arrangement at Heathrow (1,460m separation) and that originally proposed by BAA for a second runway at Stansted Airport (2,200m separation). The two runway airport wide-spaced layout as shown in the consultation document<sup>9</sup> for the 2003 White Paper is shown in Figure 1.

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<sup>5</sup> 'The Future of Air Transport', Department for Transport, December 2003

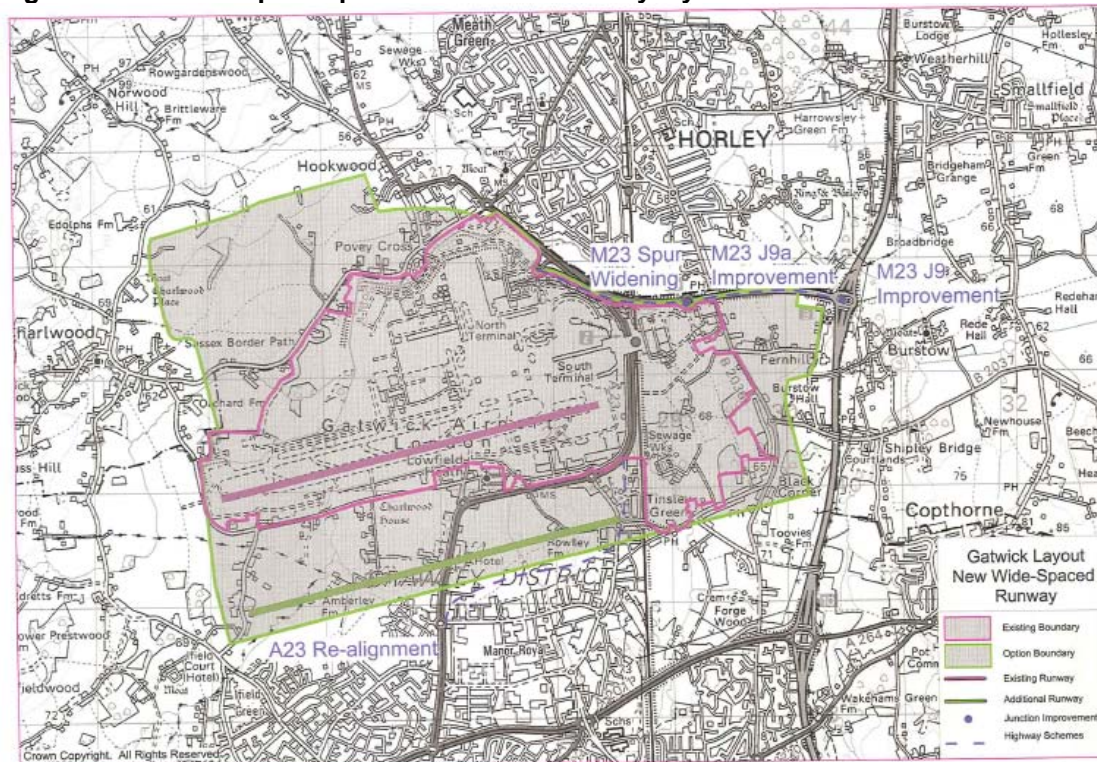
<sup>6</sup> 'Gatwick Airport Interim Master Plan', BAA, October 2006

<sup>7</sup> 'Gatwick Master Plan', Gatwick Airport Ltd, July 2012

<sup>8</sup> 'House of Commons Transport Select Committee – Oral Evidence', 3 December 2012

<sup>9</sup> 'The Future Development of Air Transport in the United Kingdom: South East. Second Edition', DfT, February 2003

Figure 1 Gatwick Airport – potential second runway layout



Source: *The Future Development of Air Transport in the United Kingdom: South East. Second Edition*, DfT, February 2003.

The airport currently proposes that a third passenger terminal is built between the two runways. The area for landside airport facilities to the east of the railway would need to be substantially extended to accommodate a transport interchange, including areas for coach parking, car rental, car parks and front-line ancillary facilities such as offices and hotels.

### Local Environmental Impacts

It is believed that construction of the second runway would require the demolition of some 17 listed buildings, including the Church of St Michael's and All Angels in Lowfield Heath and Gatwick's original 'Beehive' terminal. Some of these buildings might be dismantled and rebuilt elsewhere in the vicinity. In any event, this impact is arguably less than that of a third runway at Heathrow, where a larger residential area (the village of Sipson) would need to be demolished. It would also require the re-alignment of the A23 and the southern runway would be some 400 metres from the residential boundary of the town of Crawley at Manor Royal, whilst the airport boundary would be just 100 metres from this residential boundary. Inevitably, this proximity has caused some concern to local residents.

Whilst Gatwick is still undertaking its own detailed assessments, studies by Boeing<sup>10</sup> and by FTI Consulting<sup>11</sup> suggest that the noise impact of a second

<sup>10</sup> 'Point to Point: Financial Trends in Commercial Aviation', Boeing, December 2005

<sup>11</sup> 'The Importance of Aviation Infrastructure to Sustainable Economic Growth', FTI Consulting, October 2011



runway would be less than that for a third runway at Heathrow. Boeing has forecasted that just 13,200 people would be within the 57 dBA noise contour in comparison to some 304,000 people at Heathrow. If stricter measures are used, eg 54 dBA, the numbers of people affected at Gatwick rises to 29,600 in comparison to 710,600 people at Heathrow. The size of the area concerned is 138.6 sq km at Gatwick rather than 254 sq km at Heathrow. These figures however reflect the fact that Heathrow would have three rather than two runways as at Gatwick.

The Aviation Policy Framework<sup>12</sup> states that the Government's overall policy on aviation noise is to limit and, where possible, reduce the number of people in the UK significantly affected by aircraft noise. However, inevitably a new runway will mean that more people are affected by noise or the same people who are affected now will be subjected to more noise or more frequent noise. It is therefore imperative that measures are taken to minimise and mitigate this impact. Where this is not possible, compensation should be given to those affected. This must be applicable to noise impacts generated by both arriving and departing aircraft.

Studies have not yet been undertaken on other environmental impacts, although Gatwick maintains that, unlike the option of a third runway at Heathrow, a second runway would not breach NOx emissions limits.

### Climate Change Impacts

As far as CO<sub>2</sub> emissions are concerned, the impact is related to the additional traffic generated by any new runway and is not therefore specific to particular options. This is described further in a later section looking at climate change impacts for all airport runway options.

### Economic Impacts

A second runway at Gatwick would provide jobs and economic growth to west Kent, Sussex, Surrey and South London, particularly through improved surface access links to London and other parts of the UK. Gatwick Airport<sup>13</sup> estimate that with two wide spaced runways at full capacity in 2050, the potential employment generation might be expected to increase by some 18,800 to 61,000 (low productivity case) and add up to £1.66 billion (high productivity case) in GVA in the region.

### Surface Access Improvements

Road access into Gatwick is generally good via the M23/A23 and to the wider South East region via the M25. Hard shoulder running currently being implemented on the eastern section of the M25 towards the Dartford Crossing (junctions 5 to 7) should complement the existing dual four lane western

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<sup>12</sup> 'Aviation Policy Framework' Secretary of State for Transport, March 2013

<sup>13</sup> 'Airports Commission update', Gatwick Airport Ltd presentation, June 2013

section, although it is acknowledged that additional airport traffic would put increased pressure on the already congested M25.

The A23 to the south of the airport would need to be diverted and it is likely that Junction 9 of the M23 and the M23 Spur or the Airport Way link to the A23 would need to be improved. The capacity of the M23 between Junction 10 (Crawley) and Junction 9 (Gatwick Airport) is likely to need increasing due to weaving pressures from long distance traffic conflicting with airport traffic northbound in the morning peak; in addition to increased capacity needed on the long section between Junction 9 and 8 (M25), the cost of which would be significant, although hard shoulder running could be a solution<sup>14</sup>. Road connections into Central London via the A23 would also need to be upgraded.

Rail capacity between Gatwick and Central London, is also limited by the four track section between Purley and Windmill Bridge Junction just north of East Croydon. Over this four mile section, four other routes join the London to Brighton Line (LBL). To the north of Windmill Bridge Junction there are four tracks each on the routes to Victoria and London Bridge. If two extra fast tracks could be provided over this section it should provide significant extra capacity for fast services on LBL including those serving Gatwick. To achieve this it would be necessary to tunnel two additional tracks for part or all of this section. The above enhancement could also increase capacity on services from Gatwick to the South Coast as it would allow additional services to be provided. Also the current hourly South Croydon to Milton Keynes service could be extended to Gatwick if possible with an enhanced frequency to provide direct access to West Coast Main Line (WCML) corridor.

It would be beneficial to increase the frequency of the service between Gatwick and Reading from one train per hour (tph). This could be done initially by extending the existing 1 tph stopping service from Reading to Redhill to go onto Gatwick. As this service calls at all stations, it would be beneficial to increase the frequency of the current fast Reading to Gatwick service to 2 tph or more. These services need to reverse at Redhill to access Gatwick. To facilitate this service increase it may be beneficial to grade separate some of the movements at Redhill.

It would be possible to provide a service between Gatwick and mid Kent (Tonbridge and/or Maidstone or Ashford) with a reversal at Redhill. This should be considered if there is sufficient demand. This may require grade separation of the movements at Redhill and/or an additional platform. Network Rail has included the provision of an additional platform on the west side of Redhill Station in its initial plans for 2014-2019 (Control Period 5). If approved, this would facilitate both western and eastern access to Gatwick via Redhill. KCC's 'Rail Action Plan for Kent' (2011)<sup>15</sup> states that an hourly Ashford – Tonbridge – Redhill – Gatwick service would be beneficial. The business case for the service is being developed by KCC, with support from Gatwick Airport Ltd, to be a requirement of the new Thameslink or South Eastern Franchise.

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<sup>14</sup> 'Airport Study for the South East Local Enterprise Partnership: Research Study – Greater South East Airport Capacity', Parsons Brinckerhoff, May 2012

<sup>15</sup> 'Rail Action Plan for Kent', Kent County Council, 2011

The further enhancement of services at Gatwick Airport may require additional platform capacity over and above the currently planned seven. This could be achieved either by providing more platforms at Gatwick, or by providing train turning facilities further south, e.g. at Three Bridges.

There is also a long-term issue of station capacity as the Brighton side of Victoria which serves Gatwick is likely to be at capacity around 2020. One method of partially alleviating this is through the CrossRail 2 Option B regional scheme.

As identified by Transport for London (TfL), CrossRail 2 Option B regional scheme would link the West Anglia Main Line (WAML) at Tottenham Hale, with the South Western Main Line (SWML) at Wimbledon. In the central area there would be stations at Angel, Euston/St Pancras, Tottenham Court Road, Victoria and Kings Road Chelsea. The north-eastern section of this route is ideal for providing enhanced capacity to Stansted. However, the south-western section would require some modification to provide additional capacity to serve Gatwick. This modification would be a short link to access the London to Brighton Line (LBL) fast tracks south of Clapham Junction. This would relieve the capacity problems at Victoria and on LBL through Clapham Junction and allow services to run between Gatwick and Stansted. This would make efficient use of rolling stock tailored for airport access operations and would improve the connectivity between the two airports. Also, through the interchange with CrossRail 1 at Tottenham Court Road, it would provide access to Heathrow from Gatwick and Stansted.

TfL estimate the cost of CrossRail 2 Option B to be between £13 million and £16 million. If TfL decides to proceed with this scheme and funding is available, it is projected that it could open around 2033.

### Feasibility and Deliverability

There is little doubt that a second runway is technically feasible although it would be subject to planning permission. Its cost is estimated at between £4 billion and £5 billion, which is likely to be considerably less than a third runway at Heathrow (estimated at some £10 billion in the 2002 SERAS study). A second runway is an affordable solution and would be provided entirely by private finance, should the airport's owners conclude that it is a worthwhile investment and national policy support is given for an expanded Gatwick. Inevitably there would be some opposition from local residents (e.g. the Gatwick Area Conservation Campaign) and other national groups.

In terms of passenger throughput, Gatwick Airport Ltd believes that the new runway would need to be built in the mid 2020s and the earliest it could be built is 2025. It would increase its overall capacity to some 70 million passengers or 500,000 ATMs per annum. It is geographically well placed in relation to London and the main South East regional conurbations and could develop as a second London hub airport to compete with Heathrow.

## **Recommendation**

**Kent County Council recommends that a second runway at Gatwick is delivered soon after the 2019 planning agreement ends. Gatwick is approaching its capacity limit for a single runway airport and additional runway and terminal facilities in the 2020s will allow the airport to grow and compete as a hub airport with Heathrow; therefore provides increased long haul connectivity for the UK. Investment in surface access infrastructure will also be required in order to facilitate passenger growth.**

## **Second Runway at Stansted**

In 2012, Stansted handled 17.5 million passengers with some 131,000 ATMs. Given the theoretical capacity of a single runway airport (approx. 40-45 million passengers per annum), this suggests that is operating at around 44% of its total capacity.

Despite rapid growth between the late 1990s and in the early part of the 2000s due to the low cost carriers, Ryanair and easyJet, traffic reached a peak of 23.8 million passengers per annum in 2007, but has declined annually since this date. This is due both to the current economic recession and the fact that these two low cost carriers now spread their operations more widely across all London airports.

A new runway at Stansted was proposed by the Government in its 2003 White Paper and remained BAA's policy as the Generation 2 (G2) proposals until these were formally abandoned on 24th May 2010.

The airport is now owned and operated by Manchester Airports Group (MAG), which also owns and operates three other UK airports. MAG agreed to buy the airport from Heathrow Airport Holdings, formerly BAA, on 18 January 2013, and the sale was completed for £1.5 billion on 28 February 2013. BAA had been required to sell the airport following a ruling originally made by the Competition Commission in March 2009.

MAG has publically stated that a second runway at Stansted is 'not a priority'. The Mayor of London however, is currently assessing an option of up to three additional runways at Stansted as an alternative to a Thames Estuary Airport in its own submission to the Airports Commission. The architectural firm, 'Make', has also funded its own study for a four runway airport and associated surface access infrastructure.

## **Runway Layout Options**

Stansted was designed by BAA plc to accommodate up to four runways. The layout shown in the 2003 White Paper<sup>16</sup> proposed a staggered wide spaced parallel runway to the East of the existing runway (see Figure 2). As both runways would operate independently on a mixed mode basis, they would

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<sup>16</sup> 'The Future of Air Transport', Department for Transport, December 2003

theoretically provide a total capacity of some 80-90 million passengers per annum.

**Figure 2 Stansted – potential second runway layout**



Source: 'The Future of Air Transport', 2002

### Local Environmental Impacts

From a noise perspective, Stansted has an advantage over the other London/South East airports (Heathrow, Gatwick, Luton and London City) in that aircraft would not fly over the congested London area. Apart from the town of Bishops Stortford to the southwest of the airport, the surrounding area has a lower population density than around the other London/South East airports. There are, however, concerns over blight, ancient woodlands and other areas of natural beauty.

### Climate Change Impacts

As far as CO<sub>2</sub> emissions are concerned, the impact is related to the additional traffic generated by any new runway and is not therefore specific to particular options. This is described further in a later section looking at climate change impacts for all airport runway options.

### Economic Impacts

A second runway at Stansted would potentially provide impetus to the economic development of the Lea Valley and the Cambridge corridors, particularly through improved surface access links to London and other parts of the UK.

### Surface Access Improvements

Stansted is connected to northeast London and Cambridge by the M11 motorway and to Braintree, Colchester and Harwich by the A120, which is dual carriageway until Braintree. The 2003 Air Transport White Paper<sup>17</sup> assumed that a two runway Stansted would require the capacity of the M11 south of the airport to be increased from three to four lanes with a new access to the airport from the motorway and new local access roads; therefore the G2 proposal promoted a new Junction 8b on the M11 and a new junction on the A120 to provide access to the proposed new terminal<sup>18</sup>.

In terms of rail access, Stansted Airport railway station is below the terminal building, with rail services to Cambridge, Leicester and the Midlands every 60 minutes operated by CrossCountry. The Stansted Express train runs to and from Liverpool Street station in London on the West Anglia Main Line (WAML) every 15 minutes and the journey time is 45 minutes to one hour. Stansted Airport<sup>19</sup> has estimated that if the rail journey time to London was reduced from 45 to 30 minutes (or there was an equivalent increase in service frequency) the airport could attract an additional 1.5 million passengers per annum.

The upgrade of the WAML between Broxbourne Junction and Coppermill Junction would provide for 8 tph to Stansted Airport from Liverpool Street and Stratford or from the proposed CrossRail 2, whose northern portal would probably be in the Coppermill Junction area.

To accommodate more than 8 tph on this route it may be necessary either to flight (group fast trains) services to avoid conflicts with services serving intermediate stations between Stansted and Broxbourne and/or increase capacity by widening to four tracks over all or part of this section (only the short section through Harlow Town Station is currently four track). Also to accommodate increases in service levels, it would probably be necessary to increase the number of platforms at Stansted Airport Station.

Further rail access improvement would be achieved through CrossRail 2 Option B regional scheme, which as previously described in the '*Second Runway at Gatwick – Surface Access Improvements*' section, would provide improved access to both Gatwick and Stansted. CrossRail 2 Option B regional scheme, would link the West Anglia Main Line (WAML) at Tottenham Hale, with the South Western Main Line (SWML) at Wimbledon. In the central area there would be stations at Angel, Euston/St Pancras, Tottenham Court Road, Victoria and Kings Road Chelsea. The north-eastern section of this route is ideal for providing enhanced capacity to Stansted. With some modifications, train services would also be able to run between Gatwick and Stansted. This would make efficient use of rolling stock tailored for airport access operations

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<sup>17</sup> 'The Future of Air Transport', Department for Transport, December 2003

<sup>18</sup> 'Airport Study for the South East Local Enterprise Partnership: Research Study – Greater South East Airport Capacity', Parsons Brinckerhoff, May 2012

<sup>19</sup> 'Airport Capacity in London', London Assembly, May 2013

and would improve the connectivity between the two airports. Also, through the interchange with CrossRail 1 at Tottenham Court Road, it would provide access to Heathrow from Gatwick and Stansted.

These enhancements would provide major benefits for domestic rail traffic in the relevant corridors as well as for airport access. In the meantime, the completion of CrossRail 1, projected for 2019, will greatly improve access to Liverpool Street particularly from the Thames Valley and Heathrow; and therefore will improve the rail accessibility of Stansted.

### Feasibility and Deliverability

A second runway at Stansted would be technically feasible although Alan Stratford and Associates Ltd believe that it would be more difficult to attract airlines to the expanded airport than to Heathrow or Gatwick. Historically Stansted has not been able to develop long haul services and it is not perceived as a major London airport by many non-UK originating passengers.

In terms of cost, G2 proposals for a new second runway and passenger terminal were estimated to cost in the order of £1.6 – 1.8 billion in 2007<sup>20</sup> (£2.0 - 2.2 billion at 2013 price levels), although this excluded major surface access improvements. It is currently unclear whether Stansted's new owners, MAG, would be willing to make the significant investment to double the airport's runway capacity, which already has significant room for growth on its existing single runway.

DfT forecasts indicate, a second runway would probably only be required between 2030 – 2040, dependent on provision of capacity at other airports and other possible measures.

### Recommendation

**Kent County Council recommends that a second runway at Stansted is delivered when the need arises, most likely in the 2030s when all London airports (with their current capacity) are forecast to be full.**

### **Competing London Dual Runway Hub Airports**

It has been suggested by Gatwick Airport Ltd that the main London airports of Heathrow, Gatwick and Stansted should be each be allowed to develop as two runway airports in order to maximise competition between them. In this way, the airports could develop on a 'level playing field'. Evidence was provided to the House of Commons Transport Select Committee<sup>21</sup> to suggest that Gatwick had attracted some long-haul services and that measures were being considered to integrate low-cost and other short-haul routes as feeders.

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<sup>20</sup> 'Review of the master plan options and costs of the Generation 2 proposals at London Stansted Airport', Alan Stratford and Associates Ltd, 2008

([www.alanstratford.co.uk/site/news.asp](http://www.alanstratford.co.uk/site/news.asp))

<sup>21</sup> 'House of Commons Transport Select Committee – Oral Evidence', 3 December 2012

It should however be noted that Gatwick's range of long-haul services is currently limited and primarily comprises services by Virgin Atlantic predominately to the Caribbean, by Garuda to Jakarta in Indonesia and Air China to Beijing. In Alan Stratford and Associates Ltd's view there is scope to expand this network, although they do not believe that a global alliance would be attracted to the airport, e.g. for transatlantic flights.

Alan Stratford and Associates Ltd state that it is debatable as to whether London could, or should, develop more than one hub airport. As previously indicated, there would be some reluctance for airlines and airline alliances to move from Heathrow, particularly as the main alliances are now, or will be, established on a terminal basis, e.g. BA/OneWorld in Terminal 5 (T5), Star Alliance in Terminal 2 (T2) and Skyteam in Terminal 4 (T4).

However, it is Kent County Council's view that by permitting a new runway at Gatwick and Stansted, coupled with improving the rail accessibility of those airports to open up the catchment areas to a wider market; it will present an opportunity for competition between airports that had not previously been possible.

British Airways (BA) holds the largest number of slots at Heathrow with 50.6% of the summer 2013 schedule<sup>22</sup>. This is the first summer season for which BA has held more than half of the slots and its increase from 44.1% in summer 2012 is due to the acquisition of bmi. This is matched by a significant growth in Virgin Atlantic's share, mainly due to the slot divestment for domestic services following BA's takeover of bmi. In summer 2001, BA held 36% of the slots and, by summer 2012, this had grown to 44.1%. BA's weekly slot holding in the summer season grew by 16% over the 11 year period; while capacity constrained Heathrow saw almost no growth in slots (less than 3%). Therefore BA and the Oneworld alliance dominate Heathrow.

Whilst the other alliances, Star and Skyteam, are investing significantly in Heathrow to operate out of their own terminals, the new T2 and refurbished T4 respectively, if their ability to grow is limited by a lack of runway capacity, with BA/Oneworld dominating the slots on the existing two runways; there is the possibility that in the future one or both of these other alliances may seek to relocate their hub operations to Gatwick (with a second runway) or even Stansted (with a second runway); where there would be available slot capacity. Given that most interlining passengers are intra-alliance transfers, airline alliances could base themselves at different airports in order to compete more effectively. This is very different to previously unsuccessful attempts to operate Gatwick as a hub airport with a single airline, British Airways, splitting its hub operations between Heathrow and Gatwick. A new competitive hub airline market would be created in the UK which could challenge the dominance of British Airways and Heathrow. Benefits to passengers arise through providing increased choice of airport which may

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<sup>22</sup> CAPA Aviation Analysis, Heathrow Airport's Slot Machine, May 2013



incentivise airlines and airports to drive down prices and improve customer experience.

Alan Stratford and Associates Ltd recognise that traffic demand at Gatwick within the next 10 years is likely to justify a second runway, for a combination of both point-to-point and hub traffic. This would provide some competition for Heathrow, particularly for non-aligned carriers. Indeed, Gatwick Airport Ltd's own vision for competition with Heathrow is not necessarily through attracting an airline alliance with a traditional hub and spoke model, but rather through attracting long haul carriers based on the strength of the London/South East origin-destination (O-D) market, without such a great need to supplement demand with transfer passengers from feeder traffic. Where this need exists and where there is demand, Gatwick are looking at ways of facilitating informal self made connections, i.e. low cost short haul to long haul connections. The airport is piloting 'Gatwick Connect', based on the 'ViaMilano' service at Milan Malpensa Airport, which allows passengers with self made transfers to check in and drop off their bags for their connecting flight in the arrivals baggage reclaim hall before proceeding landside and back through security; without the need to carry bags back through to departures and check in again. If there is demand, Gatwick have a long term vision to allow self-connecting passengers to remain airside<sup>23</sup>.

This type of competition between Heathrow and Gatwick does not necessarily need to detract Heathrow from being the UK's principal hub airport; rather it allows Gatwick to compete in the London airport market by catering for a different market segment. In terms of long haul, it may be possible that Heathrow focuses on the transatlantic North American routes and Gatwick on the Far East market. However, Gatwick does need to be able to expand, i.e. a second runway, for significant market growth to occur as the airport is close to its capacity limit for a single runway airport.

Only around a third of passengers at Heathrow are connecting passengers (33.6% in 2011<sup>24</sup>), compared to other hub airports with much higher levels of transfer traffic, e.g. Amsterdam Schiphol with 41% in 2012<sup>25</sup> and Frankfurt with approximately 54%<sup>26</sup> of passengers transferring in 2011. Therefore it could be argued that even Heathrow does not act as a 'true' hub, especially given that it only has two runways and therefore does not have the runway capacity to allow waves of arriving and departing flights with minimised connection times that 'true' hub airports can provide, e.g. Amsterdam has six runways and Frankfurt has four runways. Rather the origin-destination market, with London as a 'world city' and the high population of the South East region; supports the network of short and long haul services.

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<sup>23</sup> 'Making the best use of capacity in the short and medium term', Submission by Gatwick Airport Ltd, Ref Airports Commission: London Gatwick 006, 16 May 2013

<sup>24</sup> 'CAA Passenger Survey Report 2011', Civil Aviation Authority, 2011

<sup>25</sup> <http://www.schiphol.nl/SchipholGroup/Company1/Statistics/TrafficReview.htm> (accessed 18/06/13)

<sup>26</sup> [http://www.fraport.com/content/fraport/en/misc/binaer/press-center/facts-and-figures/jcr:content.file/zadafa-2012\\_e\\_lowres.pdf](http://www.fraport.com/content/fraport/en/misc/binaer/press-center/facts-and-figures/jcr:content.file/zadafa-2012_e_lowres.pdf) (accessed 18/06/13)

Cities such as Amsterdam and Frankfurt with hub airports have populations far less than London. Amsterdam has a population of only 821,000<sup>27</sup>, albeit serves a catchment area that encompasses one of the most densely populated countries in the world with the Netherlands population of over 16 million<sup>28</sup>. Frankfurt has a population within its metropolitan area of 2.6 million<sup>29</sup>, only Germany's fifth largest city<sup>30</sup>, although it is a hub airport for the most highly populated country in Western Europe. Compared to London however, with a population of 8.17 million, London is the most populous European city<sup>31</sup>, and there is double that population again, 8.6 million<sup>32</sup>, in the Greater South East region which the London airports serve. Therefore it could be argued that Amsterdam and Frankfurt are only able to support such dense route networks *because* they are hub airports with hub airlines. This is similar to Atlanta in the USA as Delta's hub; it is the busiest airport in the world with 89mppa in 2010<sup>33</sup> serving a metropolitan area with a population of 5.5 million<sup>34</sup>, but Atlanta is generally not regarded as a 'world city'. Dubai is rapidly becoming a major world hub for the state funded Emirates airline, but with an indigenous population of only around 2 million<sup>35</sup>, its growth is highly reliant on transfer passengers between Europe and Asia/Australasia connecting in Dubai.

It could be argued that London is a 'world city' that generates its own demand for flights and does not need a 'true' hub airport that is so dependent on transfer traffic to support its route network. This evidence would seem to support the vision of a dispersed model of multiple airports serving a major 'world city'. As well as providing competition and passenger choice, it also provides resilience with London less reliant on single airport, which is extremely disruptive when operations are restricted, for example in bad weather.

There are some examples of multiple airport systems in major 'world cities', although most of these involve non-competing airports. In the New York area, JFK is the largest airport with Delta and American Airlines, and whilst, there is some competition with Newark and its based airline United, for both international and domestic traffic, both airports primarily serve their own catchment area. New York's third airport, LaGuardia provides short haul services only. In the case of Tokyo, a second airport, Narita was built some 30 years ago to handle international traffic as the existing airport, Haneda had become full. Whilst Tokyo was once Asia's leading hub, it is now the seventh

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<sup>27</sup> <http://www.amsterdam.info/> (accessed 18/06/13)

<sup>28</sup> <http://www.amsterdam.info/netherlands/population/> (accessed 18/06/13)

<sup>29</sup> <http://www.aviewoncities.com/frankfurt/frankfurtfacts.htm?tab=population> (accessed 18/06/13)

<sup>30</sup> [http://goeurope.about.com/od/frankfurt/p/frankfurt\\_info.htm](http://goeurope.about.com/od/frankfurt/p/frankfurt_info.htm) (accessed 18/06/13)

<sup>31</sup> <http://www.londoncouncils.gov.uk/londonfacts/default.htm?category=2> (accessed 18/06/13)

<sup>32</sup> <http://www.ons.gov.uk/ons/rel/mro/news-release/census-2011-result-shows-increase-in-population-of-the-south-east/censussoutheastnr0712.html> (accessed 18/06/13)

<sup>33</sup> <http://www.aci.aero/Data-Centre/Annual-Traffic-Data/Passengers/2010-final> (accessed 18/06/13)

<sup>34</sup> <http://www.atlanta.net/visitors/population.html> (accessed 18/06/13)

<sup>35</sup> <http://www.dsc.gov.ae/EN/Pages/DubailnFigures.aspx> (accessed 18/06/13)

in terms of total traffic, which is largely due to the splitting of its airport operations.

However, there is academic research that supports multiple competing hubs that serve 'world cities' such as London and New York. De Neufville & Odoni (2003)<sup>36</sup> state that multi-airport systems exist in all the metropolitan areas that generate the largest amount of traffic, such as London and New York, and as a general rule multi-airport systems perform well for cities that are the largest generators of originating traffic, as can be seen with London's large origin-destination (O-D) market. They state that airports compete with each other for traffic and services; and the dynamics of this competition lead to concentration of traffic at the primary airports and volatile traffic at the secondary facilities. These effects can be seen in London with Heathrow as the main hub and the more volatile traffic, i.e. charter and low cost, at Gatwick, Stansted and then other secondary airports such as Luton and now more recently at Southend. However, until recently this was due to competition between airlines in their own markets, rather than competition between airports as Heathrow, Gatwick and Stansted were all owned by BAA. Since BAA was forced by the Competition Commission to break up the monopoly and sell Gatwick and Stansted, more competition between the airports is now beginning to be seen; and as previously described, could significantly change the airport market in London and the South East.

In addition, the latest technological advances in the aviation industry point to the fact that the shape of aviation operations could change in the future. The traditional hub and spoke aviation model may become less dominant with more point to point long haul services being provided by other airports. Such a scenario could operate to ensure UK connectivity remains amongst the highest in the world but without reliance on only one hub airport to provide this. The next generation of aircraft, such as the Boeing 787 'Dreamliner', a smaller plane (210-290 passengers) is capable of operating on long range routes. This means that non-hub airports, i.e. without significant numbers of transfer passengers, will be able to start to offer a full range of long haul destinations as the aircraft has sufficient range and requires just 210-290 passengers to fill its seating capacity. An aircraft of this size could achieve an economically viable loading from the large origin-destination (O-D) market of London through an airport such as Gatwick, without the aircraft being supplemented by passengers from feeder flights in a hub and spoke model, as is the case at Heathrow. This could enable long haul international connectivity to be provided at London airports other than Heathrow, i.e. at Gatwick and Stansted, and potentially across the country at regional airports if there is sufficient demand for long haul services from their catchment areas.

Heathrow's existing capacity of 70 million passengers per annum in combination with a two runway Gatwick, assuming that it could also handle 70mppa, gives a total capacity of 140mppa, equal to that of a new hub airport. In time, if Stansted also needs extra capacity, a two runway airport could

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<sup>36</sup> De Neufville, R. & Odoni, A. (2003) *Airport Systems: Planning, design and management*. McGraw-Hill, New York.

potentially add another 70 million passengers per annum, giving a total of 210mppa across three airports with a combined total of six runways.

### **Recommendation**

**Kent County Council recommends that in combination with Heathrow's two existing runways, a second runway at Gatwick delivered within the next decade, and a second runway at Stansted delivered in the 2030s, will give London three main airports with a total of six runways and a combined capacity of around 210 million passengers per annum. This is sufficient capacity to serve the London/South East area without the need for an entirely new hub airport located in the Thames Estuary or elsewhere. The advantages of a dispersed hub model spread across the London multi-airport system is that it provides resilience if problems occur at one airport; competition between airports to improve choice, and provide better value and convenience for passengers; and reduced environmental impact with growth at existing airport sites rather than an entirely new airport developed on land previously unaffected by aviation development.**

### **Second Runway at Birmingham Airport**

Birmingham Airport is situated some 6.3 miles southeast of Birmingham city centre in the West Midlands. It is the UK's seventh largest airport after Heathrow, Gatwick, Stansted, Manchester, Luton and Edinburgh airports. In 2012, it handled some 8.9 million passengers with some 84,000 ATMs, although traffic peaked at some 9.6 million in 2008. The airport primarily serves a catchment area covering the Midlands and the northern Home Counties, with some 10 million people living within 1 hour's drive time from the airport. It should be noted however, that in 2011, some 2.3 million passengers travelling to or from the Midlands area used one of the London/South East airports in preference to Birmingham or its nearby competitor, East Midlands Airport.

The airport has recently refurbished its passenger terminal by joining together the old T1 and T2 terminals into a single integrated unit. It is also currently in the process of extending its runway from 2,605m to 3,000m to increase the prospective range of destinations served. It was originally planned to build a tunnel for the A45 which crossed the extension (see Figure 3), although this road has now been diverted to the south of the extended runway.

The option for a second runway at Birmingham was assessed in the Government's 2003 White Paper, 'The Future of Air Transport in the UK'<sup>37</sup>, but was not taken forward. The Airport's Master Plan<sup>38</sup>, which was published in 2007 covered the period up to 2030 and did not envisage that a second runway would be required within this timescale. Since this date, some

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<sup>37</sup> 'The Future of Air Transport', Department for Transport, December 2003

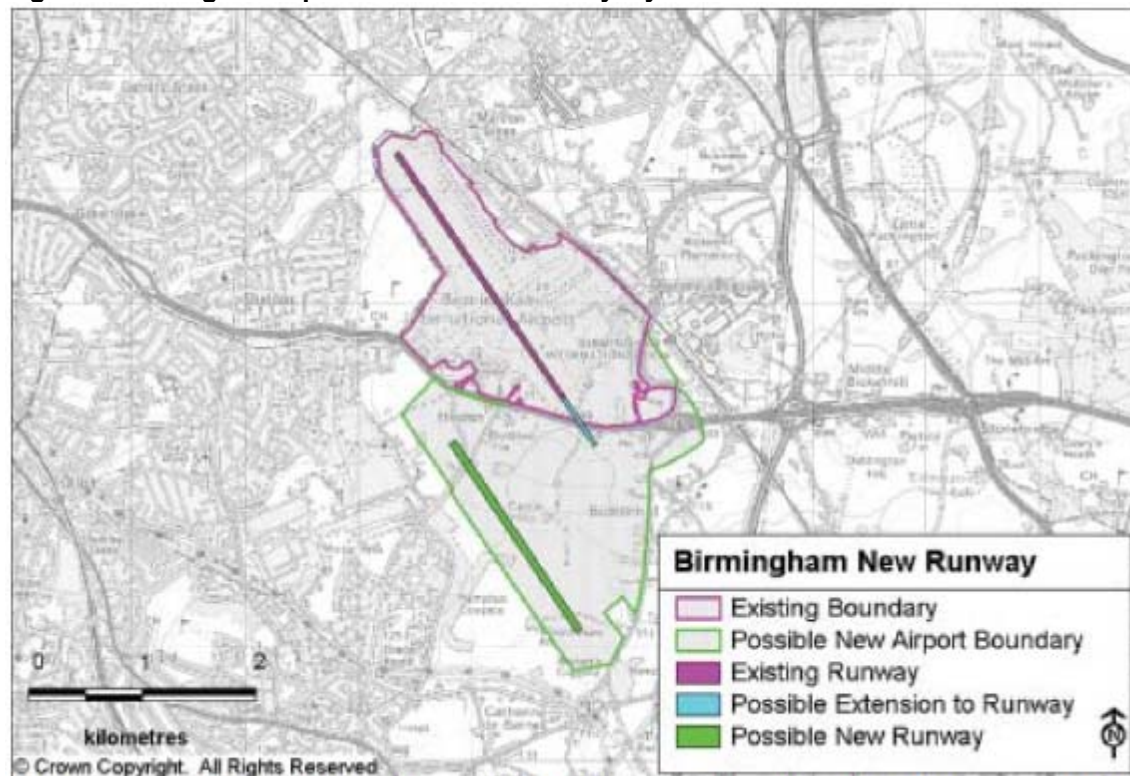
<sup>38</sup> 'Towards 2030: Preparing a sustainable future for air transport in the Midlands', Birmingham International Airport, 2007

Midland's MPs have suggested that this option should be reconsidered. It is not known whether the Airport will actively promote this option to the Airports Commission.

### Runway Layout Options

The proposed layout shown in the Government White Paper assumed that the second runway would be built to the south of the existing runway (see Figure 3).

**Figure 3 Birmingham – potential second runway layout**



Source: 'The Future Development of Air Transport in the UK: Midlands', 2002

### Local Environmental Impacts

The impact on people and on the natural and built environment would be significant. At its proposed location, the new runway would result in the loss of around 600 hectares of Green Belt land and 150 properties. Around 100,000 additional people would be forecasted to live within the 57 dBA noise contour as effectively there would be separate noise footprints for each runway.

### Climate Change Impacts

As far as CO<sub>2</sub> emissions are concerned, the impact is related to the additional traffic generated by any new runway and is not therefore specific to particular options. This is described further in a later section looking at climate change impacts for all airport runway options.

### Economic Impacts

With a second independent runway, the airport could theoretically handle about 70 million passengers per annum. In terms of economic impact, the 2003 White Paper consultation document<sup>39</sup> suggested that a new runway would be likely to provide around 15,000 more jobs than a 'maximum use' option for the existing runway.

### Surface Access Improvements

Road access is via the A45 dual carriageway road. The airport is close to Junction 6 of the M42 motorway, which links to the M1 motorway via the M6 and to the M40 for access to London and the South East. The 2003 Air Transport White Paper<sup>40</sup>, in the context of a new runway, stressed the need to improve public transport mode share and that road access, including capacity on M42 junctions 3 to 7 would need to be reviewed given both background and airport traffic growth. Congestion on the M42 has been addressed by Active Traffic Management / hard shoulder running and improvements to M42 Junction 6 were conditioned as part of the airport's planned runway extension; although the complex nature of this part of the M42 would make further additional capacity challenging<sup>41</sup>.

Rail access is through the elevated AirRail Link with Birmingham International railway station on the West Coast Main Line (WCML). London Midland and Virgin Trains currently operate from Birmingham New Street station to Birmingham International station approximately every 10 minutes (during the day time), with a journey time of 10 to 15 minutes. There are three services per hour to and from London Euston, the journey time being around 70 minutes. Birmingham New Street Station is currently being redeveloped in order to improve passenger facilities and increase rail capacity.

In the longer term, Birmingham Airport will be directly accessible via the HS2 high speed rail line. Phase 1 of HS2 between London and Birmingham is planned to open in 2026. This will include the Birmingham Interchange Station which will be around one mile from Birmingham Airport, to which it would be linked by a people mover. This will be served by 3 trains per hour (tph) from Euston with a journey time of 38 minutes including an intermediate stop at Old Oak Common to connect with CrossRail and Heathrow Express. Birmingham Airport<sup>42</sup> estimate that the first phase of HS2 could bring more than three million additional people who live within key population centres to be within one hour of the airport by rail; bringing a total of six million, or a doubling today's total catchment, within an hour's travel time by rail. A further 2 million, or a 163% increase, will be within an hour's travel time by rail when Phase 2 of HS2 opens in 2033.

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<sup>39</sup> 'The Future Development of Air Transport in the United Kingdom: The Midlands', DfT, 2002

<sup>40</sup> 'The Future of Air Transport', Department for Transport, December 2003

<sup>41</sup> 'Airport Study for the South East Local Enterprise Partnership: Research Study – Greater South East Airport Capacity', Parsons Brinckerhoff, May 2012

<sup>42</sup> 'Helping Birmingham Airport become more accessible by rail from across Britain', Birmingham Airport, report by Steer Davies Gleave, June 2013

A commitment has not yet been made on the detailed changes to the existing London to Birmingham services after HS2 is opened. It is likely that some of the existing intercity 3 tph would be retained to link intermediate stations, particularly Coventry. The economic appraisal of HS2<sup>43</sup> assumed that 2 tph would be retained, although with some additional stops while the slow services would be reduced to 2 tph. It is likely that any released train paths would be required for local services.

With HS2 Phase 1 therefore, Birmingham Airport is likely to be served from Euston by 3 tph from HS2, and 4 tph slower services via the existing line with journey times between around 80 and 120 minutes. HS2 is likely to have premium fares.

Phase 2 of HS2 will extend the line to Manchester and Leeds. This is programmed to be completed in 2033. This phase may also include a link to Heathrow Airport. Birmingham International would be served by 5 tph from Euston and 2 tph from Heathrow.

### Feasibility and Deliverability

There are no technical issues which would prevent the development of a second runway at Birmingham Airport, although it is unknown if the airport has the aspiration and ability to make the significant investment needed to double its runway capacity.

It is recognised that the airport will have potential for growth as the London/South East airports become increasingly capacity constrained over the next 15-20 years. HS2 will give the airport increased connectivity, although the use of premium fares on the high speed service could impact on whether it will be used by a high proportion of passengers based in the London/South East area. It may also struggle to attract passengers from the North West where Manchester already has a second runway and substantial scope for growth.

### Recommendation

**Kent County Council recommends that in the longer term consideration is given to a second runway at Birmingham Airport if the need arises, as a way of relieving demand on the London airports, which may become significant with the airport accessible from London within 38 minutes when HS2 opens in 2026.**

### **Utilisation of Regional Airport Capacity**

The UK has a substantial number of smaller regional airports which are underutilised. Whilst a number of these are currently unprofitable and will find it difficult to compete against larger airports as surface access links improve, there are some certain niche airports which can contribute towards the UK's

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<sup>43</sup> 'Updated Economic Case for HS2, Explanation of the Service Patterns', January 2013

capacity shortage in the longer term, particularly in the South East. The Aviation Policy Framework<sup>44</sup> states its support for airports across the UK and acknowledges the growth and importance of airports outside of London.

### **London Southend Airport**

The Stobart Group has invested significantly in Southend Airport since its acquisition in 2008 and was successful in attracting a based low cost carrier in 2012. It is an example of what can be achieved at a regional airport in the South East to cater for demand both locally and from the wider South East, despite sharing catchment areas with the major London airports; therefore is playing a valuable role to address the London/South East airport capacity shortage. Although limited by runway length (1,905m having recently been extended), Southend has developed a small network of European low cost services in just two years and is set to consolidate this market in the longer term, which takes the pressure off the other London/South East airports. London Southend Airport, which handled some 616,974 passengers in 2012, has the current capacity to accommodate up to 2 million passengers per annum, therefore currently has around 1.4m ppa of spare capacity. In the longer term, this capacity could be increased allowing the airport to handle a significant share of the short haul point to point low cost market.

### **Local Environmental Impacts**

The airport is situated on the edge of the large urban area of Southend and therefore will inevitably have issues with noise pollution as the air traffic increases. The airport has received over 1,000 claims for compensation over aircraft noise since flights at the airport increased significantly<sup>45</sup>.

### **Economic Impacts**

Over £100 million has been invested by the Stobart Group in Southend Airport since 2008 and has created more than 500 new jobs on site<sup>46</sup>. A £10million extension to the new terminal is set to open by December 2013. This will enable 300 new local jobs which will arise from the increase in Southend based aircraft over time; resulting in a variety of additional operational and service roles<sup>47</sup>.

### **Surface Access Improvements**

Road access is via the A127 dual carriageway that connects to the M25 at Junction 29. This section of the M25 in Essex has recently been widened to four lanes. However, through the urban area of Southend to the airport, the

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<sup>44</sup> 'Aviation Policy Framework' Secretary of State for Transport, March 2013

<sup>45</sup> <http://www.bbc.co.uk/news/uk-england-essex-22554104> (accessed 26/06/13)

<sup>46</sup> <http://www.southendairport.com/news/latest-news/london-southend-airport-helps-solve-the-south-east-air-capacity-shortage/> (accessed 26/06/13)

<sup>47</sup> <http://www.southendairport.com/news/latest-news/london-southend-airport-enjoys-its-busiest-year-ever/> (accessed 26/06/13)



A127 is an urban 40mph route. Local road improvements are likely to be required if the airport surpasses its planned growth of 2mppa.

Southend Airport is served by Southend Airport Station which was opened in 2011 and is adjacent to the new terminal building which opened in 2012. It is served by trains between Southend Victoria and Liverpool Street, which join the Great Eastern Main Line (GEML) just east of Shenfield. Trains call at all stations to Shenfield and then only at Stratford. There are 3 tph in the off-peak and 6 tph in the peak. Journey times to Liverpool Street are 53 minutes in the off-peak and 60 minutes in the peak.

When Crossrail opens it will take two of the four tracks on GEML between Shenfield and Stratford. The Rail Utilisation Strategy (RUS) notes that it is not practical to increase the number of trains between Shenfield and Liverpool Street beyond 24 tph, although it is planned to increase trains to 12 cars. In the longer term, the remodelling of Bow Junction should allow this to be increased to 28 tph.

The Southend Airport service could be enhanced by running the peak 6 tph, subject to sufficient paths being available on the GEML. To improve journey times the 3 additional trains could skip some of the other stops.

The completion of Crossrail in 2019 to Stratford and Liverpool Street will provide additional accessibility from west London via connections to Southend Airport services from those two stations. Interchange with HS1 at Stratford International also provides accessibility to St Pancras and north of London services; and to Kent with services to Ebbsfleet, North Kent/Medway Towns, Ashford and East Kent. With an HS1-HS2 link, passengers on high speed services from north of the capital could also access Southend via interchange at Stratford International/Stratford Regional.

The London Tilbury and Southend Line serves a large catchment in Essex Thameside. To provide access to this it would be beneficial to provide a bus link over the two miles between Southend Central Station and the airport.

### **Manston (Kent's International) Airport**

Manston airport, which has a full length 2,748m runway, is some 70 miles from London. It serves a well defined catchment area in North and East Kent and it is estimated that 1.3 million people live within one hour's drive time of the airport, with a substantially higher figure of 8 million passengers within two hours travel time from the airport<sup>48</sup>. Surface access would improve in the future with the introduction of a new rail station at Thanet Parkway. At present the airport operates a scheduled daily twice service to Amsterdam (KLM) and ad-hoc charters, although the recent successful development of Southend demonstrates that a similar type of model could be established at Manston.

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<sup>48</sup> 'Manston – Kent International Airport: Master Plan', Infratil Airports Europe Ltd, 2009

Manston Airport has the potential to make a significant contribution, through providing connections to European destinations. With its full length runway it is able to cater for all modern jet aircraft. The airport's master plan states that the airport can handle up to around 1mppa with the existing terminal subject to aircraft used, scheduling and a modest extension to the terminal; and plans for a new terminal to accommodate up to 3mppa which would then be extended to handle up to 6mppa over the next 20 years. The master plan forecasts 4.7mppa by 2033.

### Local Environmental Impacts

Manston Airport is located close to the urban area of Margate, Ramsgate and Broadstairs; therefore if air traffic is to increase, there will be environmental impacts that will affect an urban area. If air traffic increases in the future, aircraft must avoid flying over Margate and Broadstairs by keeping their path over the sea. However, as stated in its Master Plan<sup>49</sup> due to the orientation of the runway there will always be a requirement for aircraft to approach and depart over residential areas. The impact will therefore be increased noise pollution for local residents; although the Master Plan sets out a method for noise monitoring and noise contour mapping to identify which properties will require noise insulation in the future so that residents affected by noise will be assisted.

### Economic Impacts

Development of Manston as a regional airport would create employment opportunities in one of the South East's most disadvantaged areas, development for which is generally supported by the local community. Manston Airport<sup>50</sup> forecast that when the airport achieves 1mppa it would support approximately 1,000 jobs both directly at the airport, and with airlines, maintenance operations, supply contracts and induced in the tourism sector; with a Gross Value Added (GVA) of £11.4 million per annum from a total visitor spend of £48.6 million from 160,000 inbound tourist visitors due to the attractions of East Kent. The Master Plan forecasts total employment generated including direct, indirect, induced and catalytic to reach 2,800 jobs in 2018 (500 of which are direct jobs) with 2.2mppa and 6,150 in 2033 (of which 1,000 are direct jobs) with 4.7 million passengers per annum using the airport.

### Surface Access Improvements

Manston enjoys good strategic road links to London and the wider South East via the A299 dual carriageway which joins the M2 motorway. Local access has recently been improved with the completion of the East Kent Access Road. The Master Plan states that growth at Manston may result in increased surface access traffic congestion and air quality problems. With 1mppa 1,800 vehicle movements per day (departing and arriving) are expected, with 3mppa

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<sup>49</sup> 'Kent International Airport – Manston: Master Plan', Intrafil Airports Europe Ltd, 2009

<sup>50</sup> 'Manston – Kent International Airport: A Vision for the Future', 2011

5,400 vehicle movements per day and 10,800 vehicle movements per day if 6mppa were achieved<sup>51</sup>. Measures to improve road access into the site will be needed to mitigate congestion, along with a Surface Access Strategy to encourage sustainable surface access.

Manston is about two miles from Ramsgate station. In the off peak this route is served by 1 tph from Margate to St Pancras International via High Speed 1 (HS1), while in the peak this increases to 2 tph with a journey time of 76 minutes. Journey times will be reduced to around an hour with Network Rail's Journey Time Improvement (JTI) scheme between Ashford and Ramsgate. It is also served by 1 tph stopping train from Ramsgate to Charing Cross via Canterbury whose journey time from Manston is approximately 130 minutes, 1 tph to Charing Cross via Dover with a journey time of some 150 minutes and 2 tph to London Victoria via the North Kent Line with a journey time of around 120 minutes.

However these connections will need to be improved if Manston is to truly succeed as a regional airport. Research commissioned by KCC<sup>52</sup> through an EU funded project seeking to improve sustainable surface access to regional airports, reveals evidence that with a fixed rail link, passenger numbers increase as it enables a wider catchment of people to use the airport. A station (Thanet Parkway) near to Manston Airport served by high speed rail services to London will increase the attractiveness of the airport to airlines and passengers.

Line speed enhancements have been secured through a successful Regional Growth Fund bid for Phase 1 (Ashford to Canterbury) to be completed by 2016 and Phase 2 (Canterbury to Ramsgate) should be delivered by Network Rail by 2019. This will bring down journey times on high speed services between the airport and London to around an hour.

Work is underway to take forward the provision of the proposed Thanet Parkway rail station, linked to the airport by dedicated shuttle bus. KCC is seeking funding for this station to be delivered by 2017, which is estimated to cost some £12 million. The potential service frequency from the station to London would depend on which of the HS1 paths allocated to domestic trains could be used to serve Manston. It may be possible to provide a 4 tph service using the current 2 peak paths and extending the 2 peak trains from Ebbsfleet back to Ramsgate. This would be dependent upon whether demand at Ebbsfleet could be catered for. It is unlikely that a precise interval service could be offered as trains would probably need to be flighted in sets of two to avoid conflicts with the stopping services. The station would also be served by the Ramsgate to Charing Cross stopping services.

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<sup>51</sup> 'Kent International Airport – Manston: Master Plan', Inratil Airports Europe Ltd, 2009

<sup>52</sup> 'Public Transport Access to Small and Medium Sized Regional Airports', Mott MacDonald, 2011

### **Lydd (London Ashford) Airport**

Lydd Airport in the southwest of Kent has a single runway which is 1,505 metres in length. Planning permission has been given to extend the runway by 300 metres, thereby allowing Boeing B737 and Airbus A319 operations, and the construction of a new terminal building for up to 0.5 million passengers per annum. There is a future aspiration for 2mppa. At present the airport is only used for corporate and general aviation, although the planned new facilities and the fact that the airport's local airspace is outside the London TMA, provides a good platform for the airport to develop a small network of domestic and European services.

### **Local Environmental Impacts**

Very few people would be affected by noise due to the low population density of the surrounding area. However, the Romney Marsh is an important habitat for birds and there are designated sites that abut the airport boundary. The Royal Society for the Protection of Birds (RSPB) opposes the runway extension and is legally challenging the permitted expansion of the airport<sup>53</sup>.

### **Economic Impacts**

The airport estimates that with half a million passengers per annum using the airport, this would generate between 182 and 393 direct, indirect and induced jobs. This is in an area where job creation is much needed especially given the uncertainty around the long term future of Dungeness as a national energy generator.

### **Surface Access Improvements**

The airport is close to the A259 and A2070 single carriageway providing a link to Ashford and the M20 motorway (approximately 18 miles away) for onward travel to London and the South East. Local access road and junction improvements into the airport would be needed and potential upgrades to the A259 and A2070.

The airport is approximately 16 miles from the HS1 station at Ashford, so the potential total journey time to London St Pancras from the airport is approximately one hour (38 minutes from Ashford to St Pancras on HS1). A bus link could be provided to Ashford International station. Such a link plus improvements to taxi facilities and demand responsive bus services to serve the local demand were proposed in the 'Public Transport Access to Small and Medium Sized Regional Airports'<sup>54</sup> and 'Innovative Bus Services to Small and Medium Sized Regional Airports'<sup>55</sup> reports for KCC through the EU Interreg funded 'Green Sustainable Airports' project. A direct coach service from Central London was also proposed for the longer term. These reports also

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<sup>53</sup> Local Transport Today, Issue 623, page 9, 31 May – 13 June 2013

<sup>54</sup> 'Public Transport Access to Small and Medium Sized Regional Airports', Mott MacDonald, 2011

<sup>55</sup> 'Innovative Bus Services to Small and Medium Sized Regional Airports', Mott MacDonald, 2012

noted that to support further development some improvements would be required on the A259 and A2070.

### **Recommendation**

**Kent County Council recommends that there should be better utilisation of regional airport capacity in the South East at Southend, Manston and Lydd airports in Kent, for point to point flights, complementing the main London airports that provide hub operations.**

**Southend has the potential to handle 2mppa in line with its existing planning consent, but could potentially grow beyond that to cater for a significant share of the short haul point to point market. Manston has the potential to accommodate up to 5 to 6 million passengers per annum from the 2030s.**

### **Improved Rail Connectivity to Airports to create an Integrated Air-Rail Transport System**

The Aviation Policy Framework<sup>56</sup> states that in the medium and long term, airports need to be integrated into the wider transport network and that the Government will ensure that its national strategies for aviation and high-speed rail are aligned, thus providing a better travel offer to the UK travelling public. Improved rail connections across the UK as a whole and particularly the development of the high speed rail network will complement its aviation connectivity, although it should be noted that a high proportion of passengers still access many UK airports by car.

The potential improvements to the rail access at specific London/South East airports have been assessed. Faster rail journey times between the North/North West and the London/South East airports should reduce the level of domestic / short haul feeder flights at these airports. HS2 connection to Heathrow, initially through interchange with CrossRail at Old Oak Common in 2026 and potentially by direct spur in 2033, will reduce the need for domestic feeder flights into London's principal hub airport.

It is also anticipated that as the high speed rail network in Europe develops; many short haul flights, particularly those from the London/South East airports to Northern France, Belgium, the Netherlands and western Germany will transfer to high speed rail. A dedicated HS2 to HS1 link is essential to facilitate this modal shift.

The diagrammatic map in Figure 4 shows how selected existing, planned and potential new rail connections could facilitate better access to the South East's airports and could create an integrated air-rail transport system for London and the South East.

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<sup>56</sup> 'Aviation Policy Framework' Secretary of State for Transport, March 2013

The map in Figure 4 is intended to show rail connections between airports and interchange rail/metro stations. It is simplified and therefore does not show all rail connections or stations. The map is diagrammatical and therefore its geographical accuracy is limited and it is not to scale.

Figure 4 Potential Air-Rail connections in London and the South East

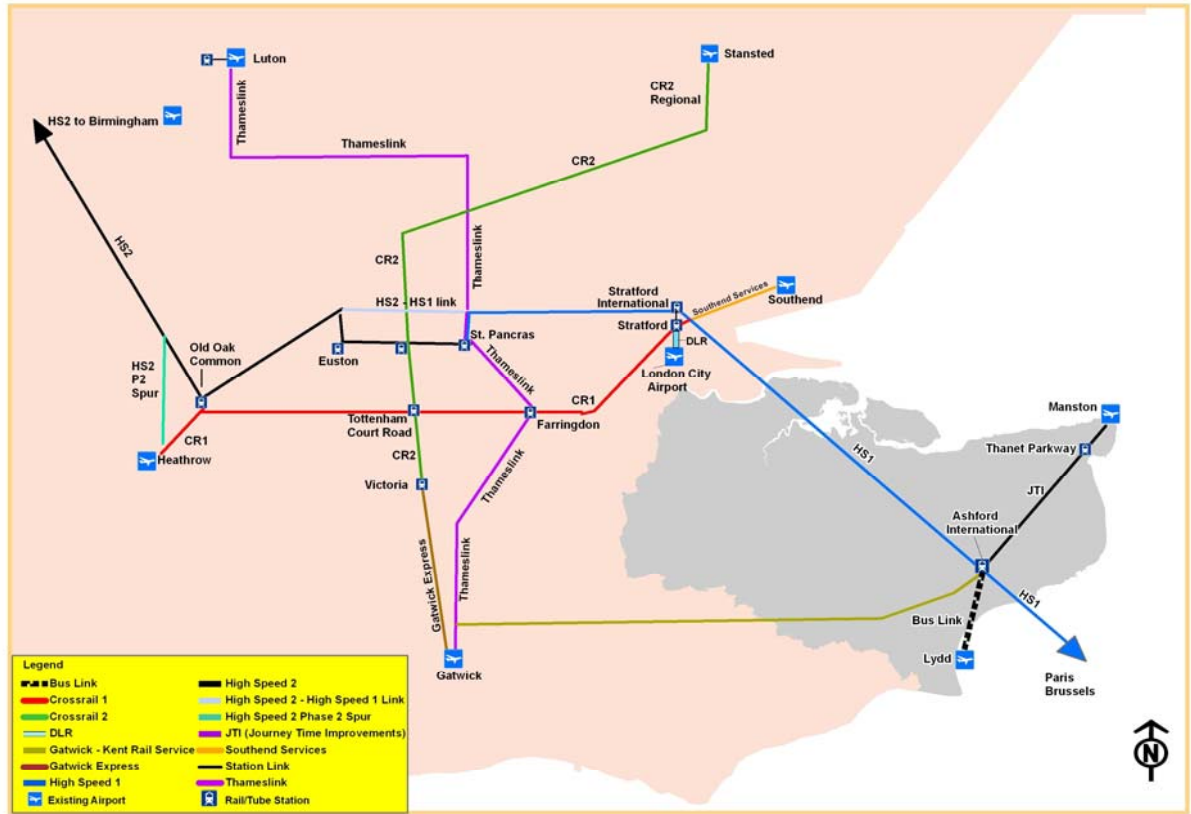


Figure 4 shows how all the main London and South East airports could be interconnected by rail. Heathrow is connected to Gatwick and Luton through CrossRail and Thameslink via interchange at Farringdon. The potential CrossRail 1 and CrossRail 2 interchange at Tottenham Court Road links Heathrow with Stansted if Option B for a Regional service goes ahead and services are extended to Stansted. CrossRail from Heathrow to Stratford (or Liverpool Street not shown in Figure 4) provides connections to services for Southend Airport. Docklands Light Rail (DLR) provides connectivity to London City Airport from Stratford. High Speed services from Stratford International via Ashford International and mainline with faster journey times from the Journey Time Improvements (JTI) scheme, provide connection to Manston Airport with a new Thanet Parkway station. A bus link between Ashford International and Lydd Airport also connects London Ashford Airport to the capital's rail network.

A service from Ashford International would provide connectivity to Gatwick from Kent. Thameslink connects Gatwick with Luton Airport and with interchange onto CrossRail at Farringdon also connects to Heathrow. The Gatwick Express provides fast direct non-stop service into Central London via

Victoria where interchange with the proposed CrossRail 2 provides connection to Stansted if the regional scheme is extended to the airport.

This proposed version of CrossRail 2 from Stansted with a Euston-St Pancras stop also provides access to HS1 at St Pancras with high speed services to Stratford International to connect to Southend Airport via Stratford Regional station; Ashford International for Manston and Lydd; and international services to Paris and Brussels. From Euston, HS2 via Old Oak Common connects to CrossRail and therefore Heathrow; and onward connection to Birmingham Airport, which with journey times of only 38 minutes from Euston, allows Birmingham to become part of the London/South East multi-airport system. An HS2-HS1 link provides the opportunity for through services from Kent to connect to Heathrow via Old Oak Common and CrossRail; or onward connection to Birmingham Airport.

Figure 4 shows that with CrossRail, which is under construction; the potential CrossRail 2 with the Option B regional service extended to Stansted; the planned High Speed 2 with proposed direct link to High Speed 1; the potential direct HS2 spur to Heathrow delivered in Phase 2; an improved Thameslink service; a new direct service between Kent and Gatwick; journey time improvements on mainline to Manston Airport served by a new Thanet Parkway station; and Lydd Airport connected to Ashford International by dedicated shuttle bus; together with enhanced service patterns on the existing services to airports; provides connectivity between airports via Central London stations and therefore an integrated air-rail transport system for London and the South East. This provides opportunities for passengers to connect between airports and therefore better integrates the London airports in the existing multi-airport system; and helps facilitate sustainable surface access to the existing airports as they expand.

### **Recommendation**

**Kent County Council recommends that in the longer term, significant investment is made to improve rail connectivity to airports to create an integrated air-rail transport system for London and the South East that facilitates sustainable surface access to the growing airports; and provides the potential for better integration of the London/South East multi-airport system.**

### **Climate Change Impacts of Additional Airport Capacity**

The carbon emissions impact of specific runway options is difficult to quantify without more detailed assessment. Therefore only a general commentary on the Climate Change impacts of additional airport capacity can be made.

Whilst there are currently no formal carbon emissions targets for aviation established on an international basis, the UK Government in 2005 set a target that total carbon emissions in 2050 should not exceed their current level of 37.5 MtCO<sub>2</sub> per annum. Forecasts for carbon emissions were produced by the Department for Transport (DfT) alongside their air traffic forecasts in January

2013. Their CO<sub>2</sub> forecasts for 2030 and 2050 by airport for a capacity constrained scenario, i.e. no additional runways, are shown in Table 2.

**Table 2 DfT CO<sub>2</sub> Emissions Forecasts 2030 and 2050 Central Constrained Case (MtCO<sub>2</sub>)**

Mppa	Base Year (2011)	Central Constrained Case (2030)	Central Constrained Case (2050)
Heathrow	18.8	21.4	18.2
Gatwick	3.9	4.7	4.3
Stansted	1.1	3.5	1.9
Manchester	2.2	3.2	5.3
Birmingham	.8	1.7	4.6
Other UK airports	6.4	9.0	12.7
<b>Total UK</b>	<b>33.2</b>	<b>43.5</b>	<b>47.0</b>

Source: DfT

By 2050, the UK's carbon emissions will exceed the Government's target by some 25%. It should be noted that whilst Heathrow contributes a high proportion of the UK's total carbon emissions, this also reflects the fact that many flights are significantly longer than those from other UK airports.

Clearly any development of an airport with new runway capacity and to operate as an additional hub will attract both increased passenger demand and longer flights. It can also be argued that transfer passengers at UK hub airports also contribute to the UK's carbon emissions levels. In practice, however, such passengers would probably fly from another international hub if a UK option were not available, so there would be no net global increase in carbon emissions from additional runways at UK airports.

### **Recommendation**

**Kent County Council recommends that additional airport capacity should be provided in the UK at selected airports, to ensure that UK airports can compete with European airports for global aviation. To restrict UK airport development on the basis of targets for UK emissions would not achieve net global reductions as there would be additional flights through non-UK hub airports. Internationally agreed carbon emission limits are needed for a global aviation industry that apply equally to all countries.**



## Conclusion – Satisfying the Long Term Options Sift Criteria

This high level proposal for additional airport capacity in the longer term, through a strategic approach, satisfies the sifting criteria for long term options as set out by the Airports Commission’s Guidance Document.

### Strategic Fit

The nature, scale and timing of the airport capacity is summarised in Table 3.

**Table 3 Summary of Proposals for Additional Airport Capacity in the Longer Term**

Airport	Additional Capacity	Timescale	Total Capacity (mppa)	Market	Connectivity
Heathrow	None	N/A	70	Hub – alliance network carriers, transfer and direct	Mix of short and long haul; long haul focus - transatlantic
Gatwick	Second Runway	2020s	70	Hub – compete with Heathrow – low cost carriers; ‘self-made’ transfers; point to point O-D market; potential alliance network base	Short haul with growing long haul; long haul focus – Asia; BRIC countries
Stansted	Second Runway	2030s	70	Point to point O-D; low cost carriers; potential competing hub if capacity constraints at Heathrow and Gatwick displace an alliance	Short haul; potential long haul development
TOTAL London Airports with Runway Capacity Added			210		
Birmingham	Second Runway	Long term horizon - post 2040	70	Point to point O-D; catchment extended to London with HS2	Short haul; potential long haul development
TOTAL including Birmingham (with extra runway) in the London system			280		
Utilise Regional Airport Capacity	N/A	Within next 5 years		Point to point O-D; low cost carriers; charter	Short haul
- Manston			6		
- Southend			2		
- Lydd			0.5		
Applicable Short and Medium Term Measures (including Luton Airport)*	N/A	Next 5 – 10 years	30	Applies to various market segments	Various connectivity benefits
<b>TOTAL</b>			<b>318.5</b>		

\* See ‘Proposals for making the best use of existing capacity in the short and medium term’, Response by Kent County Council to the Airports Commission, May 2013

Table 3 shows how this strategic approach will provide the UK's aviation capacity and connectivity needs over the coming decades. It provides more capacity than an entirely new hub airport whilst providing opportunities for competition between airports. Each market segment is addressed, i.e. low cost and network carriers and a range of connectivity needs are provided, i.e. short haul and long haul to existing and emerging market destinations. Building on the success of existing airports, it will enhance the UK's status as Europe's most important aviation hub; without the risk of this being lost while a new hub airport is being built and no investment takes place at existing airports given that they would be closed or significantly downsized.

As shown in Table 3, with an extra runway at Gatwick and Stansted, in combination with Heathrow's existing two runways, this provides capacity for 210 million passengers per annum; more than a new hub airport. With Birmingham included in the London/South East multi-airport system via high speed rail connection, this increases capacity to 280mppa. With better utilisation of regional airports in the South East and the applicable short and medium term measures to increase capacity at existing airports; system wide capacity is 318.5 million passengers per annum.

### ***Economy***

The advantages of this dispersed model for aviation growth is that the economic benefits are spread around London and the South East, and even to the Midlands with the option of an additional runway at Birmingham. Benefits are also spread to regional economies with growth at regional airports. This will help the Government's objective to re-balance the economy.

Jobs will be created directly and indirectly at each airport. Induced and catalytic jobs will be created through agglomeration as businesses locate near to the airports. It builds on the existing success of airport development in the South East, such as the agglomeration of businesses around Heathrow and Gatwick, rather than risk losing them if a new hub airport was built elsewhere.

Passengers will be given a greater range of choice as to what airport they use and competition between the airports will drive prices down for both passengers and airlines. This will be beneficial to the UK economy rather than all aviation activity being based at a single hub.

Overall the national economy will benefit as London will have six runways at three airports and will continue to be the best connected city in Europe and one of the best connected in the world. The London multi-airport system, rather than a single dominant airport, will be able to compete with the hub airports at Amsterdam, Paris and Frankfurt. It is essential that the UK has a level playing field with Europe in regards to Air Passenger Duty (APD), therefore action is also needed to correct this competitive disadvantage and a long term commitment is needed to ensure that UK airports are able to compete with their European rivals.

## **Surface Access**

Key to this proposal is improved surface access by rail. Investment is needed in existing infrastructure and alternations to service patterns in combination with planned new infrastructure, e.g. HS2 and CrossRail, to provide good connectivity to airports to create an integrated air-rail transport system. The rail proposals outlined will improve sustainable surface access to existing airports from London and the South East; and create excellent connections between airports. This will improve journey times from major business and population centres for users of aviation services and enhances existing transport corridors.

Although the rail improvements outlined will help to facilitate sustainable surface access to airports, and help to mitigate against increased road congestion from access traffic as the airports grow; improvements to road access will also be needed. As with the rail investment, improvements to the highway network, both strategic and local, will also provide significant wider economic benefits to regional and national economies in addition to directly enhancing accessibility to the South East's airports.

## **Environment**

Air quality and noise implications for expanding the airports in this proposal are far less than adding a third runway at Heathrow. There will be noise and air quality issues for all additional runways at all airports, therefore it is essential that the proposed airport expansions are only permitted with adequate mitigation measures and substantial compensation to affected local residents.

The proposed expansion of existing airports does far less environmental damage than constructing a new hub airport with new surface access infrastructure in the Thames Estuary or off the Kent coast, which would impact on many designated sites or local, national, European and international significance.

Climate change implications of new runways are negated as without new capacity at UK airports, UK passengers would use other European and international hubs to make their journeys; therefore is likely to result in a greater level of carbon emission than if UK passengers can fly direct from major hub airports in the South East with newly added runway capacity.

## **People**

Passenger experience in terms of choice, cost and accessibility will be improved as passengers will be able to choose which airport to use based on convenience for them; and through the enhanced competition that this model will create, lower fares should result.

The social impacts of airport expansion will be both positive, in terms of job creation and economic prosperity, and negative in terms of noise and health.

It is vital that communities feel the benefits with adequate new community facilities, schools, hospitals etc that will be needed for the increased population that will grow around the expanded airports. This will put pressure on local housing stock and create a significant need for new development; however this would be less than that required for a new hub airport built in an area that does not already experience these demands, such as a new airport in the Thames Estuary or off the Kent coast.

### **Cost**

A second runway at Gatwick could be delivered for around £5 billion. It would be financed by the private sector without any public subsidy. The airport's owners are already investigating the business case for making the investment, which is likely to be positive.

A second runway at Stansted has been estimated to be deliverable for around £2-2.5 billion, excluding surface access infrastructure. It is anticipated that the runway would be financed privately by the airport operator, however it is unknown whether the existing owners see this significant investment as part of their current business needs; although an additional runway at Stansted is not likely to be needed for a further twenty years.

Further work is needed to establish the cost and commercial viability of an additional runway at Birmingham Airport. This is a longer term option, unlikely to be needed before the 2040s.

Investment at regional airports, such as Manston, where significant capacity exists already, is minimal in comparison as the runways already exist. Terminal improvements would be needed but these would come online incrementally as the airports grow.

The cost of the surface access improvements needed to facilitate sustainable surface access by rail and create an integrated air-rail transport network needs to be more fully investigated. A lot of the works outlined are already planned as part of existing wider programmes and funding is already committed. Further enhancements that are needed, including road access infrastructure, could be financed by a combination of the public and private (airport operator) sector.

Both the airport developments (runways and terminals) and the required surface access infrastructure to the existing airports, is of far lower cost, more deliverable and more reliant on private sector rather than public sector funding, compared to a new hub airport in the Thames Estuary or off the Kent coast.

### **Operational Viability**

Although there would be some requirement to redesign airspace to accommodate the additional air traffic movements arising from new runways, these existing airports are already part of the UK airspace system and the

London Terminal Control Area (LTMA). This is unlike a new airport in the Thames Estuary or off the Kent coast, which would require a complete re-design of UK and Northern European airspace.

Operational resilience would be enhanced with multiple airports capable of handling the traffic that currently uses one principal hub, therefore maintaining the UK's connectivity in the event of disruption from bad weather or other unforeseen events.

### ***Delivery***

Gatwick Airport Ltd is likely to be able to deliver a second runway by the mid 2020s. It is needed imminently and the airport operator is keen to push ahead with plans. There is very little risk to this not being delivered as it would be entirely privately funded.

Additional runways at Stansted and Birmingham present a greater level of risk as their need, and therefore commercial viability, is much further into the future, i.e. the 2030s and 2040s. However, once a policy of incremental growth at existing airports is set by the Government, and as these airports reach full capacity on a single runway, the business case for delivery of additional runways will become apparent.

Regional airports, such as Manston, are already in a position to accommodate extra passengers but require airlines to take the commercial risk to run services.

The majority of the surface access improvements for rail schemes are already planned and funding is set aside, therefore negating the risk of non-delivery. The further improvements that are needed can also be justified on the benefits that they will bring for rail passengers, or road users, and their wider economic impacts in addition to supporting growth at existing airports; providing the backbone of the UK's transport infrastructure.

All of these proposals outlined in this submission are far more deliverable, affordable, less environmentally damaging and more economically beneficial than a new hub airport in the Thames Estuary or off the Kent coast, and will satisfy the UK's long term aviation needs.

In the interests of the national economy the need to act is now.

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David Brazier  
Cabinet Member – Transport and Environment

Kent County Council

19 July 2013