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SECTION 77 TOWN AND COUNTRY PLANNING ACT 1990 – REFERENCE OF APPLICATIONS TO THE SECRETARY OF STATE FOR COMMUNITIES AND LOCAL GOVERNMENT

TOWN AND COUNTRY PLANNING (INQUIRIES PROCEDURE) (ENGLAND) RULES 2000

**APPENDICES TO THE
REBUTTAL PROOF OF EVIDENCE OF LOUISE CONGDON
BA (Soc Sci), MTD**

SOCIO-ECONOMIC CASE

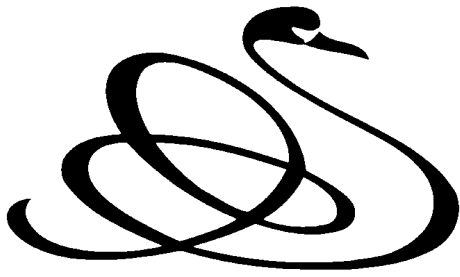
In respect of:

Planning Application Reference: Y06/1647/SH (New Terminal Building)

Planning Application Reference: Y06/1648/SH (Runway Extension)

relating to land at London Ashford Airport, Lydd, Romney Marsh, Kent, TN29 9QL





York Aviation

Originated by: Louise Congdon

Dated: 20th January 2011

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Dated:



York Aviation

**DEVELOPMENT OF A PASSENGER TERMINAL, A RUNWAY
EXTENSION AND IMPROVED ACCESS ARRANGEMENTS AT
LYDD AIRPORT, ROMNEY MARSH, KENT**

SOCIO-ECONOMIC REBUTTAL

APPENDICES

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**APPENDIX 1: STATEMENTS BY THE MINISTER OF STATE FOR
TRANSPORT, DECEMBER 2010**

Speech for Eversheds Aviation Seminar

Speech by: [The Rt Hon Theresa Villiers MP \(/press/ministers/theresavilliers\)](#)

Date delivered: 14 December 2010

Event: Eversheds Aviation Seminar

Thank you for that kind introduction

I'm delighted to be here today to set out some of the Government ideas on airports and aviation.

Events such as this one are always a useful reminder of the unique contribution the aviation industry makes to our economy and to our daily lives.

Our airports, airlines and associated industries generate billions of pounds worth of economic output for the UK.

They are a catalyst for growth, creating and supporting hundreds of thousands of jobs.

Aviation has broadened our horizons and shrunk our world...bringing people, communities and countries closer together than ever before.

Testing times

And it is beyond any question that aviation has been through testing times over recent years.

Grappling with fluctuating oil prices and the global recession is one thing

... but I suspect few in the industry could have predicted that an Icelandic volcano would add to their woes as Eyja-fyalla-yokull blasted ash into the atmosphere across Europe last April.

Add to that the long running and intense debate on the local and global environmental impacts of aviation ... and it's clear that the industry faces a formidable set of challenges.

I am certain no one here would dispute the fact that international travel provides a hugely positive contribution to the quality of life of millions of families in the UK.

But nor can there be any doubt that the local environmental impact of aviation ... such as noise ... can have a corrosive impact on quality of life for those under the flightpath.

The task we face today is to find a way to enable the aviation industry to deliver the benefits we want in a sustainable way ... with reduced environmental impacts.

With our decision to reject new runways at Heathrow, Gatwick and Stanted ... we need to start a new chapter in the history of aviation ...

... one that promotes a competitive industry ... supporting UK economic growth .. while recognising the need for restraint.

We need to find a way to create the right conditions for aviation to flourish within a capacity constrained environment.

Key to achieving that is making the best use of the capacity we have and improving the quality of the passenger experience at UK airports.

Environmental impact

On the environmental side ... I'm pleased to say that real advances are being made.

Airports, airlines, air traffic managers and manufacturers are working together to develop new ways to mitigate the environmental impact of aviation.

New aircraft are getting steadily quieter ... and more fuel-efficient.

Progress is being made on improving operating practices to reduce fuel consumption.

And research on sustainable biofuels is producing some striking results.

But the scale and urgency of action required means that multilateral measures like ETS also have a pivotal part to play.

APD reform can also help ...

... and let me make it clear that our goal on APD is to deliver the change we need without imposing excessive and disproportionate burdens on the industry or their customers.

But the Coalition will continue to press for the global action and global solutions we need to successfully address aviation's climate change impacts.

Three stages

Today I'd like to outline some of the key projects we are undertaking to deliver the new chapter in aviation policy we've promised.

I'll take three core stages in turn early priorities for the next few months then medium and longer term initiatives.

Early priorities - SEAT

To help us deliver early progress on some key aviation issues ... we have established the South East Airports Taskforce.

Its remit covers measures to improve the passenger experience at Heathrow, Gatwick and Stansted.

But I'd like to emphasise that while the Taskforce is focused on the big airports in the south east ... the Government fully recognises the vital importance of regional airports right across the country.

They can be vital economic drivers for the regions they serve providing crucial connectivity and helping to support local businesses.

A key part of our approach to aviation is to seek to create the right conditions for regional airports to flourish.

We believe that they have a valuable part to play in delivering the Coalition's commitment to rebalancing our economy and reduce the prosperity gap between north and south.

They also have the potential to help relieve overcrowding at south east airports.

Turning back to the Taskforce ... I'd like to consider three of its key workstreams:

... resilience and delays,

... border controls

... and security.

Resilience and delays

Clearly the decision we have made to reject new runways at Heathrow, Gatwick and Stansted makes it more important than ever that we use the capacity we have in an efficient way.

So I have asked the Civil Aviation Authority to work with Taskforce members to explore what further measures might be taken to improve the overall performance of these airports within their existing capacity limits.

Aspects of this work cover ... for example ... performance management issues such as scheduling and movement of aircraft on the ground.

The group is also looking at ways to use terminal capacity more efficiently to help improve flows through the airport.

Border controls

Another recurrent topic in the Taskforce is border control.

Industry representatives continue to express their concerns about long queues for people arriving in the UK.

I gather that these concerns were highlighted once again by Baroness Valentine in her speech earlier today.

Well let me make it clear that I understand these concerns and I believe it is very important that improvements are made.

Securing our borders is vital if we are to combat illegal immigration and turn away criminals seeking to come to Britain.

But we also recognise the importance of providing an efficient system for processing passengers.

Nor do we under-estimate the impact first impressions can have on visitors arriving in the UK.

So the Department is working with the Home Office and the Borders and Immigration Agency to find workable solutions here.

Technological advance provides real cause for optimism here.

For example, electronic gates that will accept the new generation of chipped passports have real potential to improve performance.

And the advance provision of electronic passenger information could allow whole flights to be cleared with only limited checks needed on arrival.

Security

A third key issue for the Taskforce is security ... working alongside the invaluable input from the Department's wider industry group the National Aviation Security Committee.

Now there are certainly a few political challenges to be negotiated in this context.

The tension faced by policy-makers is neatly illustrated by two quotes from the Sun newspaper from just a few weeks ago.

On 28th October ... in the wake of Martin Broughton's comments on security checks, the paper's editorial said:

"many will agree with BA chairman Martin Broughton, who says our airport security checks have got out of hand."

That was followed just three days later ... after the cargo bomb plot was uncovered, the Sun said:

"Stay strong: "this is not the time for police to heed the calls of disgruntled airline bosses or holiday-makers by relaxing airport checks."

There's no doubt that the recent cargo bomb plot provided yet another illustration of the ever-present threat posed by terrorists and the continuing Al Qaeda focus on aviation.

And I'd like to pay tribute to the people in our police and security services, in Transec and in industry who work tirelessly every day to keep flying safe and secure.

And let me make it clear ... security of passengers will always be paramount.

We will not compromise the high standards of security that are currently delivered.

However, the Coalition recognises that the aviation industry has been arguing for some time that the regulatory framework for aviation security needs reform.

We agree that changing the way aviation security is delivered could yield greater efficiency without compromising passenger security.

We inherited a system from the previous Government that mandates highly detailed processes for delivering aviation security standards.

We are working on a fresh approach ...

... one where the Government concentrates on setting rigorous security outcomes to be achieved ...

... but gives industry much more flexibility to devise the processes which will deliver those outcomes in the most efficient and passenger-friendly way.

In the safety field the aviation industry has achieved outstanding results in developing safe systems and inculcating a highly effective safety culture.

We believe we can draw on that experience in improving aviation security.

I believe a move to outcome-focused ... risk-based regulation will enable the industry, not just to maintain current high standards in security, but to improve them still further.

And I believe the new approach will enable these results to be delivered more efficiently with benefits for airlines, airports and passengers.

We propose to consult formally on reform proposals early in the New Year.

Consumer protection

The remaining issue I'd like to look at as part of our programme of work on early priorities is reforming consumer protection.

Protecting consumer interests is an important goal in itself but it's also the case that measures which enhance consumer confidence in international travel can have a positive impact on the aviation industry.

The Government believes that the ATOL scheme which is supposed to protect passengers if their tour operator or travel agent goes bust must be modernised.

Our aims are threefold:

... to adapt the scheme to catch up with the realities of today's complex holiday market.

... to provide much greater clarity to consumers on when they are protected ...

... and to secure the financial sustainability of the fund.

In particular ... we recognise the urgent need to address the loophole in the scheme revealed by the Travel Republic.

The result of this legal judgement is that products which look almost exactly like package holidays can be sold in such a way as to fall outside the ATOL scheme.

This leaves holiday-makers unprotected and the financial sustainability of the fund under threat.

We expect to be making an announcement early next year on how we propose to address this issue.

Turning to another aspect of consumer protection ... I recognise that EC261 is now operating in a way that was simply not foreseen when the legislation was adopted.

In particular, the Sturgeon judgment that equates a 3 hour delay with a cancellation and consequently mandates high pay-outs is difficult to reconcile with holding a fair balance between industry and customer.

My colleague, the Secretary of State, raised this at his very first attendance at the Council of Ministers ...

... and the Department is continuing to work with the Commission on a way forward on this.

That said ... the slow pace of legislative change in the EU means that this issue is one that blends into the next section of my speech ... namely medium term projects.

But there can be no doubt that change is needed.

Medium term

Our medium term priorities include progress on the Single European Sky project which has significant potential to cut down on delays, improve resilience and see our airports working better.

But the centre-piece of our medium term work is modernisation of the framework for economic regulation of airports.

We signalled our intention to legislation in this area in the Queen's speech.

The current airport economic regulation model was established back in the 1980s.

Both the industry and the CAA agree it is out-dated and in need of reform.

So we want to replace the existing framework for setting price caps at regulated airports with a more flexible system.

Rather than focusing the bulk of regulatory action on a single price review every few years ... we want to give the CAA the powers it needs to become a more responsive regulator throughout the regulatory control period.

Whether it's security queues, passenger facilities, or aircraft stands ...

... the licence based system we propose should enable to regulator to become much more activist in intervening where an airport is failing its customers.

New enforcement powers including financial penalties should enable the CAA to tackle poor performance more effectively.

As well as encouraging improvements to the way airports operate ... we believe the new regime should incentivise investment in the right kind of new facilities ...

... such as better baggage handling equipment and terminal improvements that are in tune with what passengers want.

A key part of our reform package involves giving the CAA a new primary duty to promote the interests of passengers.

But let me emphasise that this does not mean that the voice of airlines will go unheard or disregarded by the regulator.

I fully recognise the importance of ensuring that the reformed system is responsive to the concerns of airlines as the direct users of airports.

It's crystal clear to me that protecting the passenger interest will often be best served by listening to the airlines whose business it is to give their customers what they want.

I know the airline community is concerned about the decision to focus the new regulatory system on passengers ... ie the end-user of airports ...

... but this is consistent with the regime in operation in other regulatory contexts ...

... and I really don't think it is unreasonable to ask the regulator to give priority to passenger interests in the limited range of cases where the interests of airlines and their customers are not aligned.

And we have listened to industry concerns on Labour's proposal to give a role to Passenger Focus.

Instead we are working with the CAA to build on the work of the long-standing Air Transport Users Council ... to create enhanced advocacy for passengers alongside a stronger consumer focus within CAA.

Longer Term/Conclusion

In my concluding remarks this afternoon, I'd like to outline our longer term plans for delivering a successful and sustainable aviation industry.

Next Spring, the DfT will issue a scoping document setting out the key issues we are seeking to address in our overall strategy for aviation ...

... a strategy to support economic growth, protect Heathrow's status as a highly successful global hub and addresses aviation's environmental impacts.

We will then open up a dialogue with a wide range of stakeholders to seek their views and to draw on their knowledge and experience.

Our intention is to publish a draft policy document for formal consultation early in 2012 ... with a view to adopting our new aviation strategy in 2013.

Across the board on aviation ... the Coalition is already engaging on multiple levels and in many different ways with a range of stakeholders ... including the airports, aviation and aerospace industries.

As we move forward in developing our more detailed strategy ... your input will be invaluable ... alongside that of a host of interested parties who care passionately about the decisions we will be making ...

... like community groups, environmentalists, local authorities, business organisations and passengers.

We want this to be a very open and inclusive process.

Input from all of these diverse interests and perspectives will be hugely beneficial in helping us get the right answers on aviation ...

... answers which improve connectivity, generate prosperity and continue to provide millions of people with the benefits that travel abroad can bring ...

... but do so in a way which does not impose an unacceptable cost in terms of our environment or our quality of life.

I do not under-estimate how difficult this task will be but it is vital that we achieve it.

And let's remember that it's barely a hundred or so years since the Wright brothers first risked life and limb by taking to the skies in box shaped bi-planes made of spruce and kept aloft with 12 horse power engines.

During that period ... Britain's world beating aviation and aerospace industries have solved many seemingly intractable problems.

I have every confidence that by working together ... we can do so again.

Thank you.

(This speech represented existing departmental policy but the words may not have been the same as those used by the Minister.)

Archive: Article[return to list](#) | ◀ article 1 of 1 ▶**UK Govt mulls APD hike on flights from airports in the south east**

Kerry Reals, London (15Dec10, 09:54 GMT, 154 words)

Air passenger duty (APD) in the UK could be raised on flights from congested airports in the south east as part of a differential levy plan under consideration by the new Government.

"It is not inconceivable that our tax reform might look at a higher tax to fly from congested south east airports," UK minister of state for aviation Theresa Villiers said yesterday at the New Direction for Aviation Policy conference in London.

Charging a higher rate to fly from airports in the south east, such as London Heathrow or Gatwick, would create more of a balance between these airports and the UK's regional airports, says Villiers.

"A key part of our approach is to create conditions for regional airports to flourish, and this also has the potential to help relieve overcrowding at south east airports," she adds.

The Government said earlier this year that it would consider replacing APD with a per-aircraft tax.

Source: Air Transport Intelligence news

[Contact the author](#)

Related Stories

UK Govt to outline new aviation policy plans next spring	(Flight Int'l: 16Dec10, 269 words)
UK Govt to outline new aviation policy plans next spring	(ATI News: 15Dec10, 10:30 GMT, 297 words)
UK Govt to look at replacing APD with per-aircraft levy	(ATI News: 22Jun10, 16:14 GMT, 214 words)
UK airports pressing for rethink on APD successor	(ATI News: 07Jul08, 11:53 GMT, 308 words)
Tour operators mull next move after APD appeal fails	(ATI News: 03Jul08, 13:56 GMT, 198 words)

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**APPENDIX 2: EXTRACT FROM SERAS STAGE TWO APPRAISAL
FINDINGS REPORT 2002**

The predominance of business related traffic would restrict the passenger numbers to a low figure of approximately 100,000.

- The runway availability in Option 2 accommodates the largest business jets, which are simply variants of commercial airliners such as the B737-based BBJ and similar Airbus types. It would therefore be feasible under this option to support commercial passenger services on European routes in the scheduled, low cost and low volume charter markets. Constrained by land availability north of the runway, the optioneering capacity was determined at 6 mppa.

4.8.15 With both options being accommodated within the existing site boundary, the principal constraint to development would be airspace interaction with Heathrow and Gatwick and a high noise impact with Option 2 on the south westerly heading.

Lydd

4.8.16 With the exception of a twice-daily scheduled Lydd-Shoreham-LeTouquet service operated by Skytrek, the predominant activity at Lydd is GA and training flights. There is little commercial activity apart from a small aircraft maintenance and modification business and a number of flying schools. The former owner, Atlantic Bridge, established a ten year development plan which built on an initial phase to 'prove' the market for small scale scheduled services through to a final phase targeting the potential growth generated by continuing pressure on the main London airports. However, in view of the general absence of physical constraints both on and around the site, optioneering aimed at exploring the potential for large scale passenger and freight operations. Three options were developed, based on increasing levels of runway capability:

- Option 1 would restrict operations to BAe 146 sized aircraft, mainly serving the shorter haul domestic and European scheduled and low volume charter services. Maintaining current levels of maintenance and support facilities, capacity would be constrained by land availability to approximately 2 mppa.
- Option 2 would widen the runway to 45m and allow the facility to extend beyond the current site boundary. Similar markets to Option 1 would be served but over longer sectors and at higher loads. To handle a throughput of 5mppa a rail link to Ashford with connections elsewhere via CTRL is included.
- Option 3 exploits surrounding land to yield maximum practical capacity. A full code 4D facility with a runway length of 2450m would be provided for a high target throughput of 25 mppa. Using aircraft up to B767 or A310 size, accessible markets would be east coast USA and the Middle East. Additionally, to take

advantage of a potential 24 hour operating period, a freight capacity of 200,000 tonnes per year is assumed.

- 4.8.17 Options 1 and 2 have relatively little land take impact but Option 3 requires extensive land acquisition. With relatively low noise impact, except in Option 3 where properties to the east would be significantly affected, the principal impediment to development potential would be the remote location of the airport relative to target markets.
- 4.8.18 Forecasts identified passenger demand of approximately 130,000 at 2030 with 1,500 annual ATMs carrying 15,500 tonnes of freight, mostly to and from north west Europe on freighter aircraft.

Manston

- 4.8.19 To reflect the absence of significant physical constraints and the current owners' development plans to expand the former military base to take advantage of the perceived lack of capacity at the region's main airports, optioneering focused on large scale passenger and freight development potential. Two options were explored, one to handle 10mppa and the other 30mppa, but both with the added capability of accommodating 0.5 million annual tonnes of freight and major aircraft maintenance facilities. Both would target the full spectrum of air services, including long haul scheduled and charters utilising a range of aircraft up to the B747.
- 4.8.20 Similar in configuration to the current proposals, Option 1 aims to maximise capacity within the current site boundary, extending the runway by 450m to 3200m with a full parallel taxiway. The whole of the available land with airside frontage is developed for passenger terminal/ apron and freight facilities, whilst land to the north is used for aircraft maintenance hangar development.
- 4.8.21 Option 2 is developed from Option 1, with the aim of matching terminal capacity to runway capacity. With extended terminal, apron and parking areas the passenger capacity is raised to 30 mppa. Although freight and maintenance areas are kept at the same level, this option would require a significant amount of additional land, taking a number of residential and commercial properties and the whole of the RAF facilities. A rail link would be provided, which would connect to Ashford and the London/CTRL services.
- 4.8.22 The principal constraint to development would be an increase in noise exposure at the new levels of activity, particularly on the approach path over Ramsgate to the east. Although there are no local airspace restrictions, Manston lies beneath some of the busiest cross channel airways giving access to Europe and so movements would need to share airspace capacity with heavy traffic flows to and from the main London airports.
- 4.8.23 Stage One forecasts indicated that Manston could support domestic, EC and non-EC scheduled and non-scheduled services, including long haul. Passenger numbers are forecast to rise from

13. Small Sites Summary

13.1 Introduction

- 13.1.1 [Chapter 4](#) explains the background to the inclusion of the small sites in Stage One of SERAS and gives a brief overview of the options addressed and the principal constraints at each site. For further detail, the two reports referenced in that Chapter should be consulted.
- 13.1.2 This Chapter presents the conclusions drawn in the Demand and Impact Appraisal report, and sets them in the context of the Stage Two findings. The small sites examined are; Biggin Hill, Cambridge, Farnborough, Lydd, Manston, Norwich, Shoreham, Southampton and Southend.
- 13.1.3 The options appraised at London City Airport in Stage One have also been summarised in [Chapter 4](#). That Chapter indicated that the airport is one of the most constrained sites in respect of future development potential, and therefore for completeness of analysis it has been included here.

13.2 Development Potential

- 13.2.1 All of the sites studied have the potential for a degree of capacity development. Equally, all are constrained in one way or another; by physical limitations such as land availability and surrounding development, or by the potential impact of increased capacity and activity on their surroundings.
- 13.2.2 In physical terms, Lydd and Manston are probably the least constrained. Manston has a long runway and a sizeable land holding. There is sufficient undeveloped land around Lydd, if it could be acquired, for substantial development. At the other end of the spectrum, the sites at Shoreham and Southend are strongly constrained by surrounding development, roads, rail lines or environmentally sensitive areas.
- 13.2.3 The potential for capacity development at London City and Southampton Airports was assessed at the Stage One optioneering work, to a similar level of detail as applied to the major airports. In both cases a number of development options were examined, yielding various amounts of additional capacity, within existing or expanded site boundaries.
- 13.2.4 At Southampton, existing site boundaries are strongly defined by a main rail line, a motorway, a river and a country park. Runway length is constrained by the motorway and commercial and residential development. While the runway may not be a constraint on the domestic and short

haul traffic likely to favour the airport, a limit would be set by the amount of land available for terminal, apron and supporting development. With the runway on its present alignment, the only practical axis of site expansion would be eastwards across the River Itchen and into the adjacent Itchen Valley Country Park. An option for runway realignment and extension, with greatly expanded terminal and apron capacity was also considered. None of the options for major expansion beyond the existing site boundaries was considered viable, mainly due to their potential impact on environmentally sensitive areas and features.

13.2.5 Similarly detailed study was applied to London City Airport. Options were examined for runway extension on the existing alignment and revised alignments designed to avoid limits imposed by aeronautical obstacles in the area. Various locations and layouts for expanded terminal, apron and access facilities were also examined. A significant increase in runway length is severely constrained by tall buildings and other structures on approach and departure paths. These cannot be entirely avoided, even with major changes of runway orientation or location. Land for facility expansion is limited by surrounding residential and commercial development, and by the extent of the tidal dock basin in which the airport is located. It was concluded that a degree of expansion is feasible, given some additional land and further extension over the dock, to enable passenger and aircraft handling capacity to better match the potential capacity of the existing runway.

13.2.6 In practice, as the following discussion of demand indicates, the viability of development at all the small sites, and at London City and Southampton, is likely to be determined, in the first instance, more by their ability to attract traffic than by their physical potential for expansion.

13.3 Likely Demand

13.3.1 Different approaches to forecasting the demand for commercial air services at these sites have been followed. Consultants were appointed to give an initial estimate of the maximum potential market demand for services at these airports (excluding London City) and the potential interest of airlines in providing different services at these airports respectively. This advice had to recognise the principal constraints surrounding increased activity and development at these sites and deal with the difficulties imposed by:

- the long, 30-year SERAS planning period;
- alternative scenarios of constraint at the major South East airports, ranging from highly constrained (no new capacity of any sort) to making maximum use of existing runways in the South East and to relatively unconstrained scenarios with additional runways, with the small airports making a greater contribution to meeting demand the greater the constraint at the main airports;

- estimating the ability of the smaller airports to generate their own services serving local catchments, and the destinations, aircraft types and frequencies of these services; and
- estimating the ability of these airports to compete for overspill traffic from the main south east airports with larger, more distant, regional airports (eg, Bristol, Birmingham, East Midlands) which would have a wider range of higher frequency services.

13.3.2 The broad findings from this initial assessment are summarised in [Table 13.1](#) for passenger forecasts, and [Table 13.2](#) for ATM forecasts. The great majority of traffic envisaged as being displaced from the major airports to the small sites is on domestic and EU area routes, mainly scheduled services but including some charter. Some long haul charter and low cost airline operations were forecast. The total passenger forecast at all of these sites taken together (excluding Farnborough, which is assumed not to cater for commercial aviation, and London City) was in the range of 6 to 9 mppa in 2015 and 11 to 15 mppa in 2030.

13.3.3 Three of these airports – London City, Southampton and Norwich – are included in the SPASM model, and forecast use of these airports has therefore been made within all the SPASM runs undertaken for SERAS. In this chapter, forecasts at these three airports are summarised for two scenarios: one of constraint (no new runways) at the principal South East airports and one scenario which includes new runway provision at Heathrow, Gatwick and Stansted.

London City

- 13.3.4 Table 13.3 presents passenger forecasts at London City from SPASM runs for a constrained scenario (Package 3) and a less constrained scenario (Package 15). Assumed capacities in both scenarios are 73,000 ATMs and 3.5 mppa to 2004 and 5 mppa from 2005.
- 13.3.5 In 2000 London City served 1.6 million passengers on 50,000 passenger ATMs. In both forecast scenarios, London City passengers are forecast to increase to over 2 million by 2005 and 4 million by 2010. By 2010, London City is constrained by its assumed ATM capacity of 73,000 ATMs.
- 13.3.6 In the constrained scenario (Package 3) London City ATMs continue at capacity with some increase in passengers to 5 million by 2030 as passengers per ATM increase from 58 in 2010 to 73 in 2030.
- 13.3.7 In the less constrained scenario (Package 15) London City loses about half of its total 2010 demand, so that in 2015, with an additional runway at Heathrow, it is serving only 2 million passengers.

Table 13.3: London City Forecasts

	2000 actual	2005	2010	2015	2020	2025	2030
SE Capacity Constrained Scenario (Package 3)							
Passengers, mppa	1.6	2.1	4.3	4.3	4.8	5.1	5.1
Passenger ATMs, '000	50	44	74	72	72	71	69
Passengers per ATM	32	46	58	59	66	71	73
SE Less Capacity Constrained Scenario (Package 15)							
Passengers, mppa	1.6	2.1	4.1	2.0	4.0	4.2	4.8
Passenger ATMs, '000	50	44	71	40	67	69	74
Passengers per ATM	32	46	57	48	60	60	65

Note: Figures in **bold** are capacity-constrained forecasts

Southampton

- 13.3.8 Forecasts for Southampton in a constrained scenario (Package 3) and a less constrained scenario (Package 15) are summarised in Table 13.4. Assumed capacities in both scenarios are 150,000 ATMs per year and 2 mppa to 2003 and 6 mppa from 2004.
- 13.3.9 In the constrained scenario (Package 3) growth is forecast in mainly short haul passengers to 2.8 mppa by 2015. After 2015 there is more growth in short haul scheduled services increasing total passengers to 6.3 mppa by 2020 and 7.1 mppa by 2030. After 2020, forecasts are constrained by the assumed ATM capacity.
- 13.3.10 In the less constrained scenario (Package 15), growth in short haul services is altogether slower. Total passengers increase to 2.2 mppa by 2020 and 3.0 mppa by 2030. Capacity constraints do not come into play.

Table 13.4: Southampton Forecasts

	2000 actual	2005	2010	2015	2020	2025	2030
SE Capacity Constrained Scenario (Package 3)							
Passengers, mppa	0.9	1.2	1.7	2.8	6.3	7.2	7.1
Passenger ATMs, '000	28	37	49	70	134	150	146
Passengers per ATM	30	32	34	40	47	48	49
SE Less Capacity Constrained Scenario (Package 15)							
Passengers, mppa	0.9	1.2	1.6	1.6	2.2	2.5	3.0
Passenger ATMs, '000	28	37	48	45	55	60	70
Passengers per ATM	30	32	34	35	39	42	44

Note: Figures in **bold** are capacity-constrained forecasts

Norwich

- 13.3.11 [Table 13.5](#) summarises forecasts at Norwich in constrained (Package 3) and less constrained (Package 15) scenarios. ATM capacities are assumed to increase from 150,000 to 225,000 by 2020. Passenger capacities are assumed to be 1 mppa to 2010 and 12 mppa from 2011.
- 13.3.12 In the constrained scenario (Package 3), forecast demands increase from 0.4 mppa in 2000 only to 0.7 mppa by 2015, equally split between scheduled and charter. After 2015 there is a forecast increase particularly in short haul scheduled traffic pushing the passenger total up to 1.6 mppa by 2020 and 4.4 mppa by 2030.

- 13.3.13 In the less constrained scenario (Package 15), this post-2015 growth does not happen and there are only 0.7 mppa by 2030.

Table 13.5: Norwich Forecasts

	2000 actual	2005	2010	2015	2020	2025	2030
<i>SE Capacity Constrained Scenario (Package 3)</i>							
Passengers, mppa	0.4	0.5	0.6	0.7	1.6	1.8	4.4
Passenger ATMs, '000	17	6	8	8	20	21	54
Passengers per ATM	22	76	80	83	77	84	80
<i>SE Less Capacity Constrained Scenario (Package 15)</i>							
Passengers, mppa	0.4	0.5	0.6	0.5	0.6	0.6	0.7
Passenger ATMs, '000	17	6	6	6	7	8	8
Passengers per ATM	22	76	79	73	78	72	77

Summary

- 13.3.14 The SPASM forecasts for Southampton and Norwich differ considerably between the constrained and less constrained scenarios. The London City forecasts are more robust to alternative assumptions about runway development at the principal airports. It was concluded for the SPASM modelling that the potential contribution of London City, Norwich and Southampton to meeting demand in the South East is of the order of 15 mppa or somewhat more in a capacity constrained scenario in the South East, even though much the larger part of traffic spilled over from capacity-constrained South East airports is forecast to use regional airports. In addition, there may be some contribution from other sites.
- 13.3.15 From an airport capacity viewpoint, it should be possible to continue to accommodate GA and Business Aviation activity at these sites, even with anticipated growth in these sectors. At the busiest sites it might prove necessary, in time, to reduce the recreational flying element during peak periods.

13.4 Air Freight

13.4.1 A total of about a quarter of a million tonnes of air cargo may be carried to and from the nine small sites by 2030. About 70% of this is anticipated as being carried on freighter aircraft at Manston, mainly on long-haul routes. Freight traffic is also anticipated at Lydd, but on a smaller scale. The remainder is expected to fly predominantly as belly cargo on passenger services at the other six airports (excluding Farnborough). The freight throughput at the small sites is unlikely to be greatly affected by spill from major South East airports due to poor accessibility and environmental concerns.

13.4.2 [Table 13.6](#) shows demand forecasts for freight.

13.5 Impacts and Constraints

13.5.1 The impacts of development to support the anticipated levels of demand vary widely across the nine sites, reflecting the differences in their situations. Following are the key points arising from the qualitative impact appraisal.

Local planning

13.5.2 Development in strategic planning 'gaps' would be an issue of concern at four sites; Biggin Hill, Cambridge, Norwich and Shoreham. Impact on heritage property or valuable landscape areas is potentially an issue at Manston and Southend. London City development options would have relatively low impacts on heritage and townscape, but medium to high impacts on land-use.

Safety

13.5.3 Third party risk arising from aircraft operations, as represented by the extent of Public Safety Zones, is unlikely to be a significant concern at the anticipated levels of activity, except possibly at Shoreham, Southend, and for a reorientated runway at London City (Option 3), where impact is assessed as medium.

Noise

13.5.4 Aircraft noise can be expected to be a significant factor potentially constraining development at Biggin Hill, Cambridge, Manston, Southend, and for any reorientation of the runway at London City. It would be of moderate concern at Shoreham and Southampton, and could become an issue at Norwich if residential development is allowed to continue close to the airport. Concerns over noise have already resulted in a constraint on future aircraft movements at Farnborough.

Air quality

- 13.5.5 Moderate to high air quality impacts of capacity development may be expected at three sites; Cambridge, Norwich and Southampton. These arise from a combination of proximity to residential areas and probable increased congestion on local roads. At London City, Development Options 1A & 1B have the least impact in terms of air quality, whereas Option 3 has the most impact.

Surface access

- 13.5.6 Quality of surface access to these sites varies widely, as does the practicality of improvement measures. Good access to high-capacity roads is available at all except Biggin Hill, Lydd and Norwich. Upgrading of local roads or a new link from the M25 to Biggin Hill would be costly. Lydd is remote from the regional road network and extensive upgrading of existing routes would be required to make access times attractive. Norwich suffers from its main access being via a City Ring Road that is very congested at peak times; upgrading would be a far-reaching and costly process.
- 13.5.7 London City has no direct rail access, but an extension of the DLR to the airport has recently received planning consent. The airport has also benefited from the Jubilee Line extension. Southampton has a very well located rail station and Southend has imminent plans to construct a station close to the terminal area. A station on the South Coast line immediately adjacent to Shoreham Airport is feasible but there are no firm proposals for such a development at present. Rail access could be provided at Cambridge, either by dedicated bus link to the nearby city centre station on the main line, or by construction of a new station on an adjacent, connecting line. The remaining sites, Biggin Hill, Farnborough, Lydd, Manston and Norwich have no rail access point. Provision of a direct rail link would be very costly at all except Farnborough. There however, due to the nature of the air market served, a rail connection would be of significant value only to the airport workforce.

- 13.5.8 [Table 13.7](#) shows the principal impacts and constraints at each of the sites.

13.6 Airspace

- 13.6.1 Impact in relation to airspace needs to be considered from two standpoints; the effect of increased traffic at the small sites, and the effect on operations at the small sites if there was to be significant development of capacity at any of the major airports.
- 13.6.2 In the first case, some changes to existing airspace structure and management may be anticipated to efficiently accommodate increased numbers of Instrument Flight Rules (IFR) movements. The degree of change would depend on the specific configuration of local airspace and level of interaction with other traffic streams. Although detailed analysis of each case would

be required to define the necessary measures precisely, and significant changes would be needed in some cases, it is not anticipated that the requirements would be a major obstacle to the scale of operations envisaged at any one site.

13.6.3 An initial review of the potential impact on the small sites of capacity development at the major airports indicates that airspace capacity could be a significant issue in a number of cases. Sites most peripheral to the London Terminal Area are least likely to be affected in this way, including Lydd, Norwich, Shoreham and Southampton. Cambridge is likely to be significantly affected only by development at Stansted. IFR operations at Manston would be constrained significantly by development at Cliffe. Continued operations of any sort at Southend would probably be impractical if Cliffe was developed and, because of the airport's proximity to very busy airways into Europe, it would also be constrained by substantial growth at any of the existing major airports. Because of its proximity to the central area, Farnborough would be impacted by development at any of the major sites, and severely affected if that development was to be at either Heathrow or Gatwick. Similarly, Biggin Hill is almost certain to be severely affected by traffic growth at any major site, and particularly so by development at either Gatwick or Cliffe.

13.6.4 [Table 13.8](#) shows the airspace related impacts on small sites of major airport development.

13.7 Summary

13.7.1 The nine small sites reviewed in these studies have the potential to make a contribution to meeting future commercial air service demand in the South East and East in circumstances where capacity at the main South East airports is heavily constrained, and to support the GA and business aviation sectors. London City's demand is more robust to alternative assumptions about runway development at the principal airports.

13.7.2 Capacity development to meet anticipated traffic levels at any of the sites would have varying degrees and types of local impact, which could constrain their ability to accept the forecast traffic. Aircraft noise, surface access or land-related impacts are the key constraints in many cases.

13.7.3 Airspace capacity is likely to be a major factor affecting the ability of those small airports closest to the London area to realise the traffic levels anticipated in this study.

Table 13.1: Demand Forecasts, Passengers

Site	Actual passengers '000	Forecast passengers* '000		Comments
	2000	2015	2030	
Biggin Hill	6	300 – 500	500 – 800	Domestic and EC scheduled and non-scheduled.
Cambridge	20	1,600 – 1,900	3,400 - 3,200	Domestic and EC scheduled (including low-cost airline), possibly domestic and EC non-scheduled.
Farnborough	-	-	-	General and business aviation only
Lydd	2	0 – 70	0 – 130	Possibly a low level of EC scheduled and even lower level of domestic and EC non-scheduled.
Manston	8	550 - 1,600	1,000 - 2,700	Domestic, EC and non-EC scheduled and non-scheduled (including long-haul).
Norwich	367	600 - 1,100	1,100 - 1,800	Domestic and EC scheduled, EC non-scheduled, possibly some domestic and non-EC non-scheduled.
Shoreham	1	300 – 500	400 – 700	Mainly domestic and EC scheduled with a much lower level of EC non-scheduled and possibly domestic non-scheduled.
Southampton	857	1,800 – 2,400	3,000 - 3,700	Domestic and EC scheduled, a much lower level of EC non-scheduled and possibly some domestic non-scheduled.
Southend	4	900 - 1,200	1,900 - 2,000	Domestic and EC scheduled (including low cost airlines) and a much lower level of domestic and EC non-scheduled.
TOTAL		6,000 – 9,300	11,200 – 15,400	

* Forecast values have been rounded from the original data, totals may not add.

Table 13.2: Demand Forecasts, ATMs

Site	Actual ATMs	Forecast ATMs*		Comment
	2000	2015	2030	
Biggin Hill	1,323	6,900	9,400	Mainly Regional jets. A significant number of Business and GA aircraft are not included in the totals.
Cambridge	1,643	28,000	37,500	Mainly B737 type aircraft. Some larger aircraft using the runway in connection with the Marshall maintenance operation
Farnborough	-	-	-	General and business aviation only
Lydd	267	1,000	1,500	Mainly freight aircraft.
Manston	984	15,000	20,400	Mainly Regional jets with a few charter aircraft of B757 type.
Norwich	16,951	16,500	21,500	Regional jets and B737 type aircraft.
Shoreham	665	12,000	17,300	Limited to commuter aircraft and Regional jets. Major airport for GA (not included in totals)
Southampton	28,134	33,800	43,700	Regional jets.
Southend	874	17,900	24,200	Mainly B737 types subject to runway extension to 1750m. Business and GA movements in addition.
TOTAL	50,841	131,000	175,600	

* Forecast values have been rounded from the original data, totals may not add.

Table 13.6: Demand Forecasts, Freight

Site	Actual freight Tonne		Forecast freight Tonne		Comment
	2000	2015	2015	2030	
Biggin Hill	1	2,500	3,500		Carried on passenger aircraft.
Cambridge	43	12,500	18,500		Carried on passenger aircraft.
Farnborough	-	-	-		General and business aviation only
London City	-	-	-		Passenger aviation only
Lydd	6	9,500	15,500		To and from NW Europe on freighter aircraft.
Manston	32,239	118,000	168,000		Mainly on long-haul freighter aircraft.
Norwich	144	11,000	15,500		Carried on passenger aircraft.
Shoreham	13	1,000	1,500		Carried on passenger aircraft.
Southampton	260	11,000	16,500		Carried on passenger aircraft.
Southend	780	5,000	8,000		Carried on passenger aircraft.
TOTAL	33,486	170,500	247,000		

Table 13.7: Impacts and Constraints

Site	Planning Impact	3rd Party Risk	Noise	Rail Access	Road Access	Air Quality	Airspace	Principal Constraints
Biggin Hill	Development in Strategic Gap. LA strongly opposed on noise and road access grounds	Low	High Impact	Poor. No direct rail link	Poor. Current access roads of low standard; upgrading would be difficult. Improved access to M25 would be required	Low to medium impact	Major interaction with LHR, LGW, STN and potential new site	Airspace Surface Access Noise
Cambridge	Development in Strategic Gap.	None	High Impact	Reasonable access could be provided	Good access via ring road. Some would access through Cambridge City	Medium to high impact	Interaction with STN	Noise
Farnborough	Recent agreement on number of movements for GA and BusAv	None	Medium Impact	No direct rail link	Good access	Low impact	Major interaction with LHR, LGW	Airspace Recent agreement on role of airfield
London City	Parts surrounding area to NE & W classified as Metropolitan Open Land, Green Space	Low	Low/Med Impact	No direct rail link, but DLR branch planned.	Good access to Canary Wharf and City of London	Low to medium impact	Major interaction with LHR, LGW	Surrounding physical constraints
Lydd	LA in favour from employment perspective	None	Low Impact	Remote. Unreasonable cost to provide a service	Remote from market. Higher quality road access needed	Low impact	None	Location relative to market
Manston	Landscape impact but LA generally in favour	None	High Impact on housing to east of runway	Rail access difficult and costly	Good but fairly remote from market	Low to medium impact	Interaction with potential new site	Noise Distance from market

Site	Planning Impact	3rd Party Risk	Noise	Rail Access	Road Access	Air Quality	Airspace	Principal Constraints
Norwich	LA in favour of additional jobs but concerned if development required in Strategic Gap	None	Impact on housing being built at east end of site	No direct rail link	Road access poor. Ring road congested	Medium to high impact	None	Surface Access Limited catchment
Shoreham	Development in Strategic Gap. LA not in favour of development	Low to Medium Impact	Medium Impact	Rail access possible	Good access to south coast towns	Low to moderate impact	None	Runway length
Southampton	Development within airport boundary not an issue	Not significant	Medium Impact	Good	Good except for local congestion	Medium to high impact	No significant problems	Runway length
Southend	Runway extension needed for low cost services would take listed church and other properties	Medium Impact	High Impact	Good. Airport station planned	Good except for immediate access	Medium impact	Major interaction with potential new site	Noise Property take for runway extension

Table 13.8 Airspace related effects on operations at small sites due to development at the major airports

Site	Type of Activity*	Major airport development scenario					Cliffe site developed
		No new runways, ex. Capacity maximised	Additional runway at LHR	Additional runway at LGW	Additional runway at STN		
Biggin Hill	VFR	✓	✓	limited	✓	limited	limited
	IFR	Limited	limited	✗	limited	✗	✗
Cambridge	VFR	✓	✓	✓	✓	✓	✓
	IFR	✓	✓	✓	limited	✓	✓
Farnborough	VFR	✓	limited	limited	✓	✓	✓
	IFR	Limited	✗	✗	limited	limited	limited
London City	IFR	✓	limited	limited	✓	limited	limited
	VFR	✓	✓	✓	✓	✓	✓
Lydd	IFR	✓	✓	✓	✓	✓	✓
	VFR	✓	✓	✓	✓	✓	✓
Manston	VFR	✓	✓	✓	✓	limited	limited
	IFR	✓	✓	✓	✓	✓	✓
Norwich	VFR	✓	✓	✓	✓	✓	✓
	IFR	✓	✓	✓	✓	✓	✓
Shoreham	VFR	✓	✓	✓	✓	✓	✓
	IFR	✓	✓	✓	✓	✓	✓
Southend	VFR	✓	✓	✓	✓	✓	✗
	IFR	Limited	limited	limited	limited	limited	✗

* VFR (Visual Flight Rules) is intended to denote GA and most Business Aviation; IFR (Instrument Flight Rules) denotes commercial scheduled and large-scale charter traffic. London City traffic is assumed to be all IFR

“limited”, indicates that this category of activity at the small airport would be limited by competing demands for available airspace capacity

✓ indicates little or no restriction beyond that seen today

✗ indicates that this category of activity would not be viable to any significant level

Table excludes Southampton, where no significant interaction is envisaged.

APPENDIX 3: AIRPORT FINANCIAL AND TRAFFIC DATA

FY	2004/5	2005/6	2006/7	2007/8	2008/9
Pax					
Blackpool	269,559	452,132	578,313	488,000	439,420
Bournemouth	501,723	916,447	983,092	1,087,537	1,058,845
Cardiff	1,536,269	1,772,121	2,000,403	2,099,118	1,983,236
Durham Tees Valley	844,000	898,597	862,288	758,533	573,089
Exeter	670,690	873,869	997,197	823,000	950,347
Humberside	532,777	462,272	521,261	466,955	431,489
Inverness	526,411	619,450	677,298	703,371	655,884
Leeds/Bradford	2,449,917	2,600,604	2,808,833	2,878,622	2,746,735
Newquay	257,897	341,400	340,763	352,548	415,488
Norwich	447,306	583,639	772,666	681,215	555,300
Plymouth	115,434	100,836	74,749	84,000	117,823

Operating Profit/Loss (000s)

Blackpool		-2,953	-4,248	-4,780	-3,603
Bournemouth	2,879	2,951	3,122	3,360	2,853
Cardiff	7,525	5,953	6,671	7,462	5,347
Durham Tees Valley	-1,054	-2,715	-2,158	-2,327	-3,986
Exeter	1,634	1,019	384	-533	1,623
Humberside	1,547	642	679	589	173
Inverness	-3,934	-2,758	-1,497	-2,156	-2,526
Leeds/Bradford	1,613	1,357	1,478	-1,698	-2,557
Newquay					
Norwich	761	563	-212	63	-264
Plymouth	-722	-616	-821	-899	-765

Charter as % of Pax

Blackpool	11%	6%	2%	1%	0%
Bournemouth	37%	19%	18%	15%	13%
Cardiff	53%	47%	48%	48%	45%
Durham Tees Valley	29%	28%	31%	29%	19%
Exeter	44%	32%	27%	27%	28%
Humberside	63%	56%	53%	53%	48%
Inverness					2%
Leeds/Bradford	20%	16%	14%	11%	10%
Newquay					1%
Norwich	50%	37%	26%	31%	35%
Plymouth	0%	0%	0%	0%	0%

Profit per pax

Blackpool		-£6.53	-£7.35	-£9.80	-£8.20
Bournemouth	£5.74	£3.22	£3.18	£3.09	£2.69
Cardiff	£4.90	£3.36	£3.33	£3.55	£2.70
Durham Tees Valley	-£1.25	-£3.02	-£2.50	-£3.07	-£6.96
Exeter	£2.44	£1.17	£0.39	-£0.65	£1.71
Humberside	£2.90	£1.39	£1.30	£1.26	£0.40
Inverness				-£3.07	-£3.85
Leeds/Bradford	£0.66	£0.52	£0.53	-£0.59	-£0.93
Newquay					£0.00
Norwich	£1.70	£0.96	-£0.27	£0.09	-£0.48
Plymouth				-£10.70	-£6.49

