



Future Development of Air Transport in the UK: South East England

Airport Transport Forum

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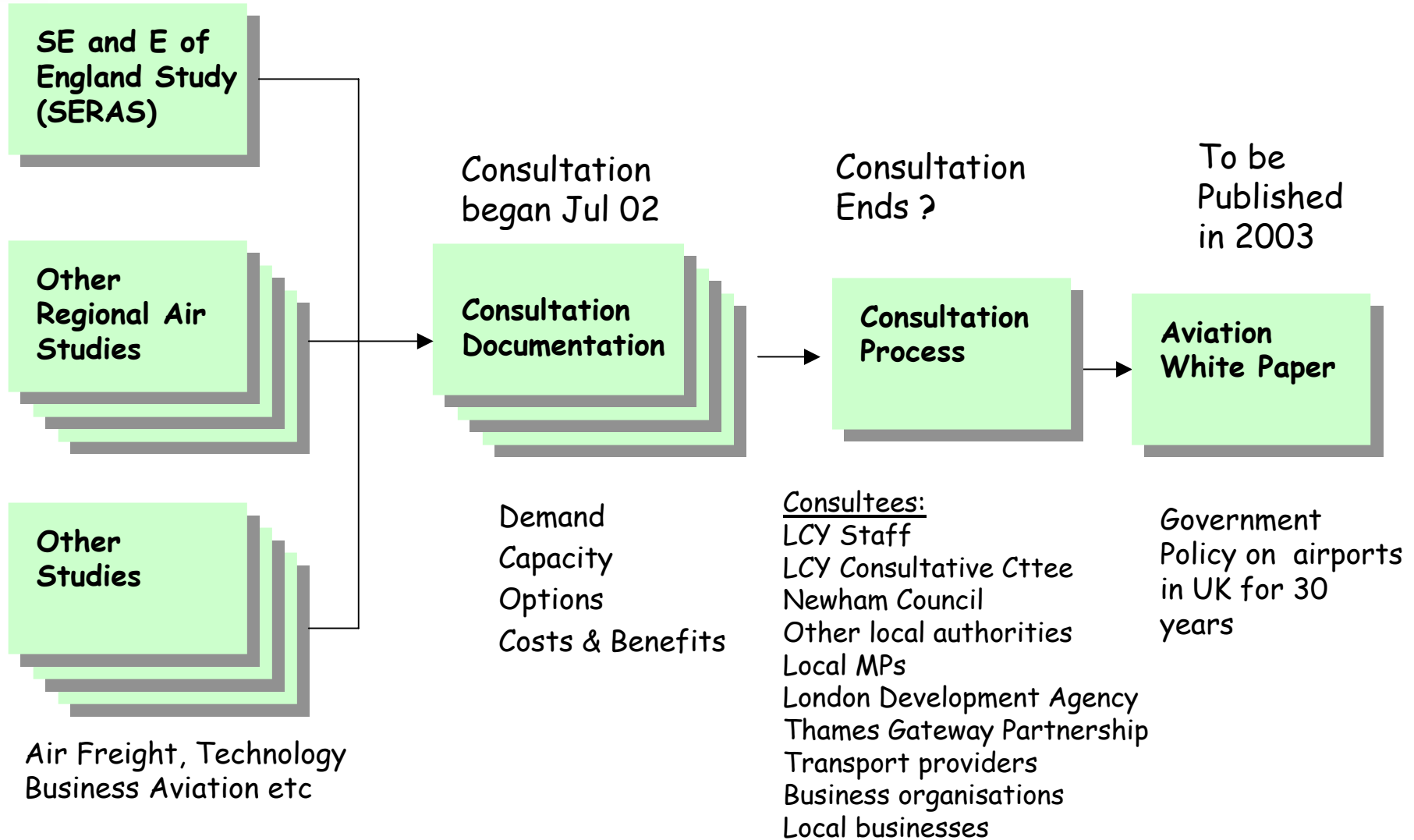
Aim

To:

1. Describe the Government's consultation process in relation to future airport capacity to 2030
2. Comment on the opportunities and implications for London City Airport
3. Highlight LCY's recommendations to Government



Setting UK Airport Policy - 'White Paper' Process and Timings





Long term Government Forecasts (million passengers per annum)

	<i>2000 actual</i>	2010	2015	2020	2030
United Kingdom	<i>181</i>	277	335	402	501
South East England	<i>117</i>	173	202	242	301



Airport Capacity Requirements in the South East

Government states that by 2030 in South East of England

3 more runways will be needed

(in addition to maximising the use of those that already exist at Heathrow, Gatwick, Stansted, London City and other South East airports)



The South East Options

Major South - East Options based on combinations of:

- 1) Heathrow
- 2) Stansted
- 3) Cliffe

Some Key Themes

- Full use of existing capacity first
- Environmental sustainability and mitigation measures
- Private sector funding of airport investment
- Surface access - use of public transport
- Importance and location of hub capacity for the SE
- Airspace congestion and reorganisation in the London Area



London City Airport Government's View

Categorised as a 'first tier' airport (along with Southampton & Norwich)

Govt expects LCY to continue to play an important niche role:

- Serving the local market
- Serving as a mainly business airport
- As a site for business aviation

Ability of LCY to attract and retain traffic in the long term is recognised by the Government *even if extra capacity is provided elsewhere in the SE.*



London City Airport Government's Assumptions

Retain existing runway with planned airside infrastructure developments

Retain similar aircraft sizes, types and services

Passenger Throughput of 5mppa by 2030 (2001 - 1.6mppa)

Maximum use of existing runway within current ATM limit of 73,000

Impacts and constraints on growth - airspace and surrounding land use



Government & LCY Forecasts for Passenger Throughput (million pax/annum)

	2000	2010	2015	2020	2025	2030
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Government Forecasts						
a) If 3 new runways built in SE	1.6	4.1	2.0	4.0	4.2	4.8
b) If no new runways built in SE	1.6	4.3	4.3	4.8	5.1	5.1
London City Airport Forecast	1.6	3.1	3.8	5.0	6.5	8.0



Current & Short - Medium Term Expansion Plans



Completed 2002 - Jet Centre Terminal & Apron, 3 additional scheduled aircraft stands

Operational Improvement Programme (Runway '28' Holding point, runway link and East Apron extension for 5 aircraft stands)



Making Better Use of Runway



Possible Future Expansion ? - Medium to Long-Term

- Additional stands and full length parallel taxiway to maximise use of runway,
- Additional terminal space
- NOTE THIS IS ONLY AN 'IMPRESSION', NOT A PLAN



LCY Recommendations to Government

LCY has the potential to grow beyond 5 mppa to at least 11 mppa over the next 30 years

....to support growth and regeneration in the Thames Gateway



Going beyond 5mppa How could we achieve this?

- More services to more destinations
- Higher frequencies on existing destinations
- Expanding services/frequencies - would require agreement to revise ATM limit above 73,000 ATM/year
- With surface access improvements - would support a Royals Crossrail station

“Make better use of the existing runway”



LCY Recommendations to Government

LCY can handle at least 21,000 corporate aircraft movements per year

....with new dedicated facilities - London City Airport Jet Centre





Corporate Aviation at LCY The Potential

- Large demand for corporate aviation in the South East
- Increasing pressure on corporate aviation at major SE Airports demand will exceed capacity at major London airports by 2005
- Most alternative airports have poor access to London, which reduces the advantage of corporate travel



LCY Recommendations to Government

Expansion at LCY would have a lower environmental impact compared with other South East airports



Environmentally Sustainable Why?

- No implications for Green Belt land
- Limited requirement for more land
- Docks have limited other uses
- No demand for night-time flying
- LCY maintains good record in community for noise mitigation
- No damage to conservation sites
- DLR link to airport. Will reduce proportion of pax using road. Crossrail to Royals even better!



Surface Transport Key to Growth at LCY

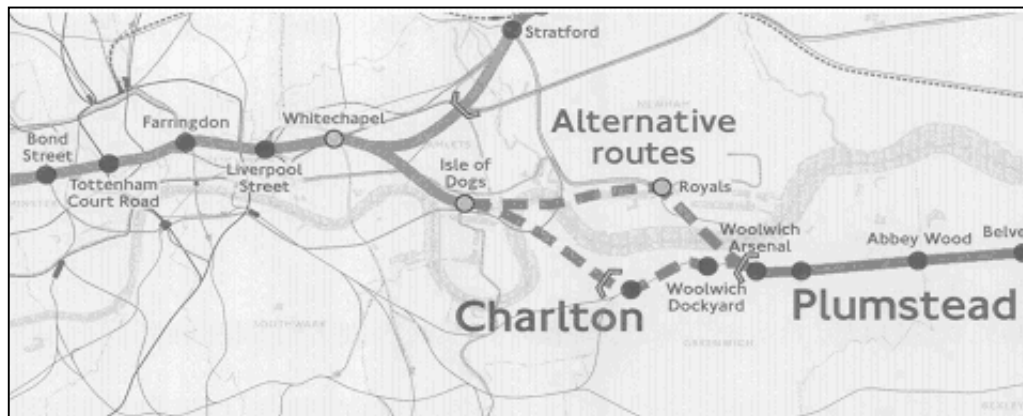
Docklands Light Railway (DLR)

Extension of the DLR to airport confirmed. Completion - 2005
Trains from LCY to Bank & Canary Wharf via Canning Town
Completion of Woolwich extension - 2007/8

Crossrail

Major East - West rail link currently being planned for London.

'Royals' Crossrail station would boost capacity of public transport to airport (needed when DLR reaches capacity)





LCY Recommendations to Government

London City Airport fulfils a key role, and will continue to do so in the future, in providing air services to London's finance & business services sector, contributing to local employment and regeneration



Growth in the East An Opportunity

THAMES GATEWAY

- 142,000 houses
- 255,000 new jobs

Isle of Dogs

150,000 jobs by 2016 (as identified in the draft London Plan)

Canary Wharf Estate

90,000 jobs at Canary Wharf by 2007/2008

The Royals

38,000 jobs by 2010,
67,000 with Royals Crossrail station





What is behind this Growth?

In the next 15 years (according to the draft London Plan).....

More Population

London's population will increase by 700,000

30+% expected to be accommodated in East London.

More Employment:

London jobs will increase by 636,000 of which 463,000 in financial and business services

More Homes

459,000 needed, many of which are planned to be in LCY's catchment area



LCY Recommendations to Government

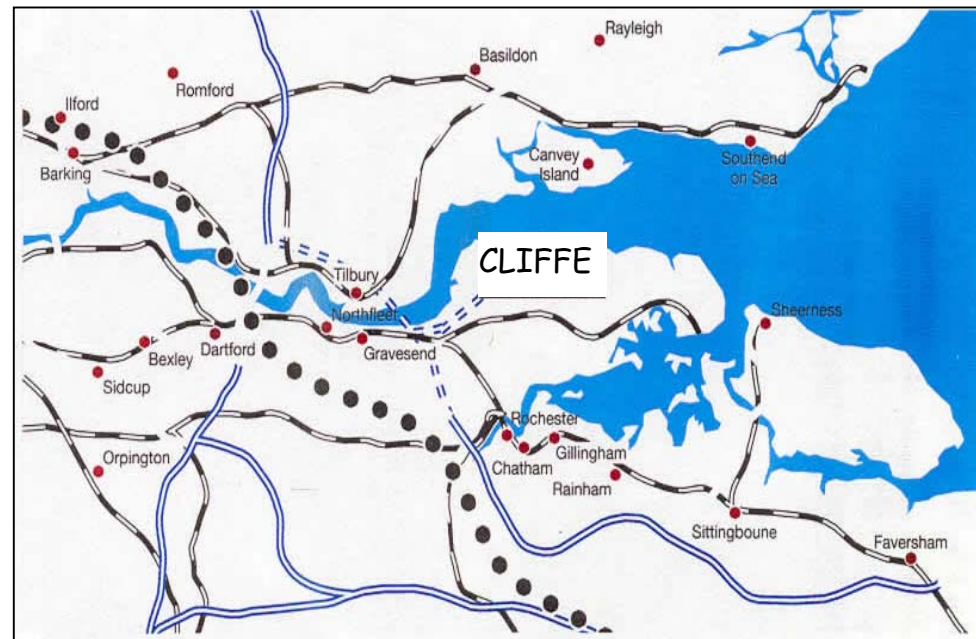
The current regulatory air transport movement cap of 73,000 per annum could be increased in future

73,000 movements is a planning constraint, not actual capacity of runway. It is possible to use the runway more intensively to "make the most of existing capacity"
(Alistair Darling MP)



LCY Recommendations to Government

Any plan to develop an airport at Cliffe, North Kent, would have severe airspace implications for LCY





LCY Recommendations to Government

Any plan to develop Cliffe would impose development blight on LCY and other South East airports

A policy decision in favour of Cliffe will undercut the economic viability of investment decisions made at all airports



LCY Recommendations to Government

LCY does not oppose an additional runway at Heathrow

LCY does not oppose an additional runway capacity at Stansted

LCY does oppose the construction of an airport at Cliffe

LCY believes that Gatwick should be included in the consultation



LCY Development Criteria

1. Should more capacity be provided?
2. Is it commercially viable?
3. If more capacity were to be provided, how much and when?
4. What measures would we need to take to minimise disruption to the local community and environment?



Questions or Further Information

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