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Developing a sustainable framework for UK aviation – The Mayor of London's response

MAYOR OF LONDON

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Mayor's foreword

Even before I became Mayor of London, it was clear to me that expanding Heathrow was not the solution to the Capital's aviation problems. A constrained site too close to thousands of homes was never going to provide us with the full-service, round-the-clock, multiple-runway hub airport that so many of our neighbours and competitors now boast. So I welcomed the Government's early decision to take the third runway at Heathrow off the table.

Saying no to a bad idea does not excuse us from working to come up with the right ideas. The Government has now embarked on a two-year programme to develop a new aviation policy framework and I am convinced that the outcome of this process must address the urgent need to find a long-term, sustainable solution for London's most serious and pressing aviation problem – a chronic lack of capacity at its hub airport.

Heathrow is already incapable of responding adequately to the emergence of new business destinations in Asia and elsewhere, and rivals such as Paris Charles de Gaulle and Frankfurt are stealing a lead. If we do not act, London will soon be surpassed by cities which in the past could not match its aviation offer and become a destination on the end of a branch line instead of the main hub it has always been. It will consequently face losing out in the competition for international business, tourism and trade. If this happens it will not only be London's prospects which suffer, but those of the rest of the UK as well.

Boris Johnson
Mayor of London

Introduction

In March 2011, the Government published a scoping document called 'Developing a sustainable framework for UK aviation'. It covers a wide range of subjects, including the role of the aviation sector, international connectivity and hub airports, regional airports, and global and local environmental issues.

This summary provides the Mayor of London's response to the document and sets out his position on a number of the most important issues. A comprehensive response to the 49 questions posed by the Government is set out in the main body of the Mayor's response, which is available on the Greater London Authority website at www.london.gov.uk.

Working towards the success of the Capital is an important part of the Mayor of London's job. His vision is for London to excel among global cities, with expanding opportunities for all its people and enterprises. While the Mayor is not directly responsible for national aviation policy, he is accountable for other essential elements of London's transport system that facilitate the movement of people and goods throughout the Capital, and he has a strong interest in ensuring that this system develops in the best interests of London and the UK.

It is from this perspective that he welcomes the opportunity to respond to the Government's scoping document for a sustainable aviation framework and the new national air passenger demand forecasts. Both of these publications shed light on one of the Mayor's key concerns, namely that current Government policy regarding the development of aviation capacity falls short of meeting London's – and the UK's – long-term aviation needs.

Aviation is strategically important for the UK, and particularly so for London. In 2009, 47 per cent of the UK's population flew at least once. According to the Department for Transport's (DfT's) forecasts, by 2030 London's airports will be full. While the Mayor has some concerns about the methodology and detailed outputs of this work, the principal issue emerges clearly – there will be no room for growth at London's current airports in less than 20 years time. The Mayor's position is that an ambitious strategy is needed for aviation in the UK to deal with the capacity gap that will exist. This is urgent if the Capital is to avoid the damaging consequences of thwarted aviation development. In the absence of such a plan the appropriate short and medium-

term measures that are also needed cannot be adequately formulated.

We would like to thank York Aviation, Volterra Consulting, SKM Colin Buchanan, Professor Peter Tyler and Andy Rumfitt for providing advice and guidance upon a range of technical issues.

Key messages

The aviation sector plays an important role in the UK economy

The aviation sector is of vital importance to the whole of the UK. The UK is home to Europe's largest aerospace industry, and after the USA, the second largest in the world. Globally, more than 600 airlines use engines built in Britain, and the wings on every Airbus aircraft are also British-made. In the southeast of England commercial aviation is a major employer. The region's airports employ approximately 130,000 people directly (around one job per thousand annual passengers). There are also thousands of jobs in the supply chain and the induced demand which the sector generates.

Above all, however, commercial aviation plays a profound enabling role in the wider economy, by enabling the flow of people, goods and capital within the UK, and between the UK and the rest of the world. London's global air links support its role as a world city and serve the needs of its highly international population. Aviation has transformed the character and nature of London's economy, enabling it to generate far more wealth than it would otherwise have been able to.

London is a £265bn a year economy, accounting for more than one-fifth of the UK's Gross Value Added (GVA). It is ranked second on many global city indices, which take account of economic, political, cultural and infrastructure characteristics. It is also the most productive region in the UK, outperforming the UK as a whole by around 33 per cent, and this high level of productivity benefits the rest of the UK. For example, London and the South East have historically paid substantially more in taxes to the Exchequer than they have received in services and transfers, while the reverse is true for all other regions. This pre-eminent position has developed over a long period of time and it is important not just for the Capital, but for the UK, that this status is maintained.

London's success is built on its connections

For several decades people and businesses based in the South East have had access to direct flights to more places and at greater frequencies than other regions. Businesses that have been heavily dependent on aviation have consequently been attracted to London and formed highly productive clusters there, most notably in the financial and business services sectors. As a result, London's service sector is bigger, more productive and more export-orientated than those in other UK regions. For example,

according to Ernst & Young's European Investment Monitor, as reported by UK Trade & Investment, the UK has attracted the vast majority of European headquarters in recent years. These decisions are made on the basis that London has good links to international networks of company facilities, access to highly skilled staff and specialised business services.

As a result, London's economy has become highly aviation intensive. This degree of integration between the economy and aviation is not found in other UK regions, where aviation is much more orientated towards outbound tourism, which contributes to the UK's tourism deficit. In the absence of evidence to suggest that the character of London's economy is likely to change substantially, the UK's long-term success is clearly linked to London preserving and enhancing its global competitiveness and status. No other UK city could play the role that London does and it is vitally important that its function in the global economy continues to be supported.

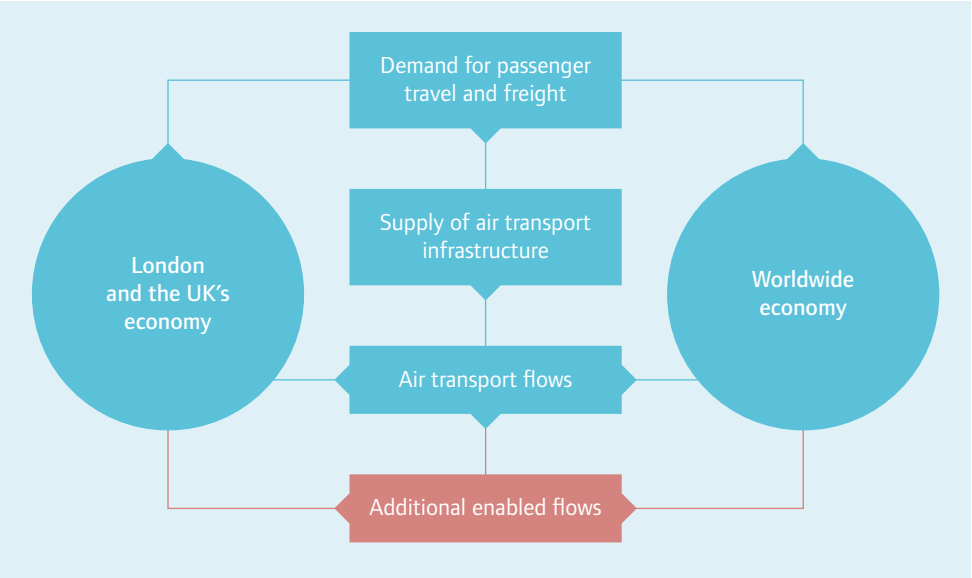
Aviation has a vital enabling role

Other than for leisure purposes within the general aviation sector, people do not generally fly for its own sake, but rather use it as a means to an end. Most demand for aviation, whether it is business, tourism, personal travel or cargo-related, is therefore derived from the demand for the activities which aviation enables. These activities generate new flows which, in turn, produce further demand for aviation, as shown in Figure 1.

Business travel brings a whole range of economic benefits, boosting productivity and profits for the organisations involved. For example, it enables collaboration within multi-national firms, which in turn produces 'social network' effects and improvements in firm performance and productivity. It also helps attract capital flows from overseas. It is estimated that foreign direct investment contributes more than £52bn each year to London's economy.

The overall skill levels of London's workforce are also significantly higher than those of every other English region. It seems likely that this is largely attributable to its ability to attract more highly skilled workers, rather than greater attainment by those in education in London than elsewhere. The Capital's highly skilled labour force contributes to the Capital's outperformance of the UK as a whole in terms of productivity.

Figure 1: 'Virtuous circle' between aviation links and the wider economy



Source: Mariya A. Ishutkina and R. John Hansman, MIT International Center for Air Transportation, 2009

Inbound tourism plays an important part in the UK economy and supports jobs and investment. London remains the UK's most attractive international tourist destination, attracting 20 million overseas visitors in 2010. The city acts as a crucial gateway for overseas tourists who go on to visit other regions. Visitors spend around £16bn in the UK annually, of which approximately £10bn is in London.

Air freight also has an important economic role. It enables access to markets and can help develop demand for goods for which speed adds value and facilitates more efficient production practices. In 2005, air freight accounted for approximately 25 per cent of the UK's total visible trade by value.[1] At this time it accounted for 55 per cent of the value of UK manufactured exports to non EU countries.[2] Air freight is

[1] Focus on Freight, DfT, December 2006

[2] The Economic Contribution of the Aviation Industry in the UK, Oxford Economic Forecasting, October 2006


Arrival

also used for fast delivery of high value-to-weight manufactured goods with short product life cycles, such as perishable foods and pharmaceuticals (71 per cent of the UK's pharmaceutical exports to countries outside the EU travelled by air in 2005). Highlighting the importance of fast delivery, UPS claims that overall the express cargo sector contributes £1.3bn of economic activity and facilitates £10bn of UK exports.

Aviation supports social inclusiveness in London

Alongside the competitiveness arguments for London maintaining pre-eminent global links there are also some reasons arising from its role in promoting social inclusiveness in the city. One third of London's population was born overseas and many other residents have family links outside the UK. Furthermore many Londoners come from relatively disadvantaged minority ethnic groups. It is important that aviation policy does not result in restrictions in people's ability to maintain their social and family ties by making flying too expensive and difficult to access.

Aviation's enabling role is crucially dependent on London having a competitive hub airport

In the decades after the Second World War London built an international network of aviation links of unparalleled quality that allowed it to act as a 'world hub' through which passengers across the globe were funnelled and connected. As a key node in this aviation network, Heathrow combines point-to-point and hub traffic and achieves a much higher level of connectivity than any other UK airport.

Many of the benefits of aviation to the UK derive from the fact that the Capital has the busiest hub airport in the world. Hub airports are vital to the economics of the airline industry. They allow many destinations across a network to be connected via a single airport. Many more city pairs can be served and at a higher frequency than would be offered otherwise. This results in a model that optimises the efficiency of the airlines' operations while maximising options for passengers.

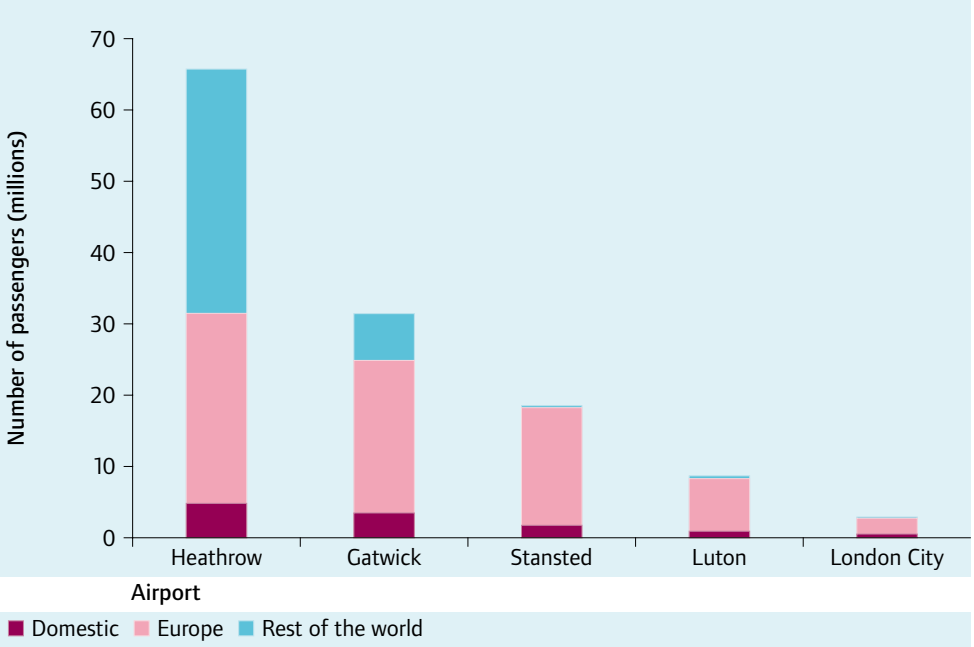
While London's five principal airports accommodate 60 per cent of UK demand, Heathrow is the only hub. Gatwick, Stansted, Luton and City focus on providing point-to-point services, like every other UK airport. Heathrow therefore plays a special role. Its hub status has a major influence on the services it can offer. Heathrow accommodates approximately 35 per cent of all passengers using UK airports to

travel overseas and 70 per cent of those travelling outside Europe. Figure 2 highlights the importance of Heathrow in meeting the UK's long haul aviation needs in particular.

The global reach of Heathrow's direct services is very valuable for London as the UK's main business location. Access to a network of direct long haul destinations is important for many businesses and they tend to cluster in the relatively small number of world cities that can offer this. Business travellers place a premium on the flexibility of high frequency flights and the convenience of direct ones. The unique role of Heathrow in meeting this need is illustrated in Figure 3 which shows the business connectivity of London's airports, measured by the number of weekly flights to a selection of key international business destinations.

Although London probably generates more international business passengers than almost any other city in the world, this

Figure 2: Destinations served by London's five principal airports, by total passengers, 2010



Source: CAA, Annual Airport Statistics, 2010

Figure 3: Business connectivity at London's five principal airports

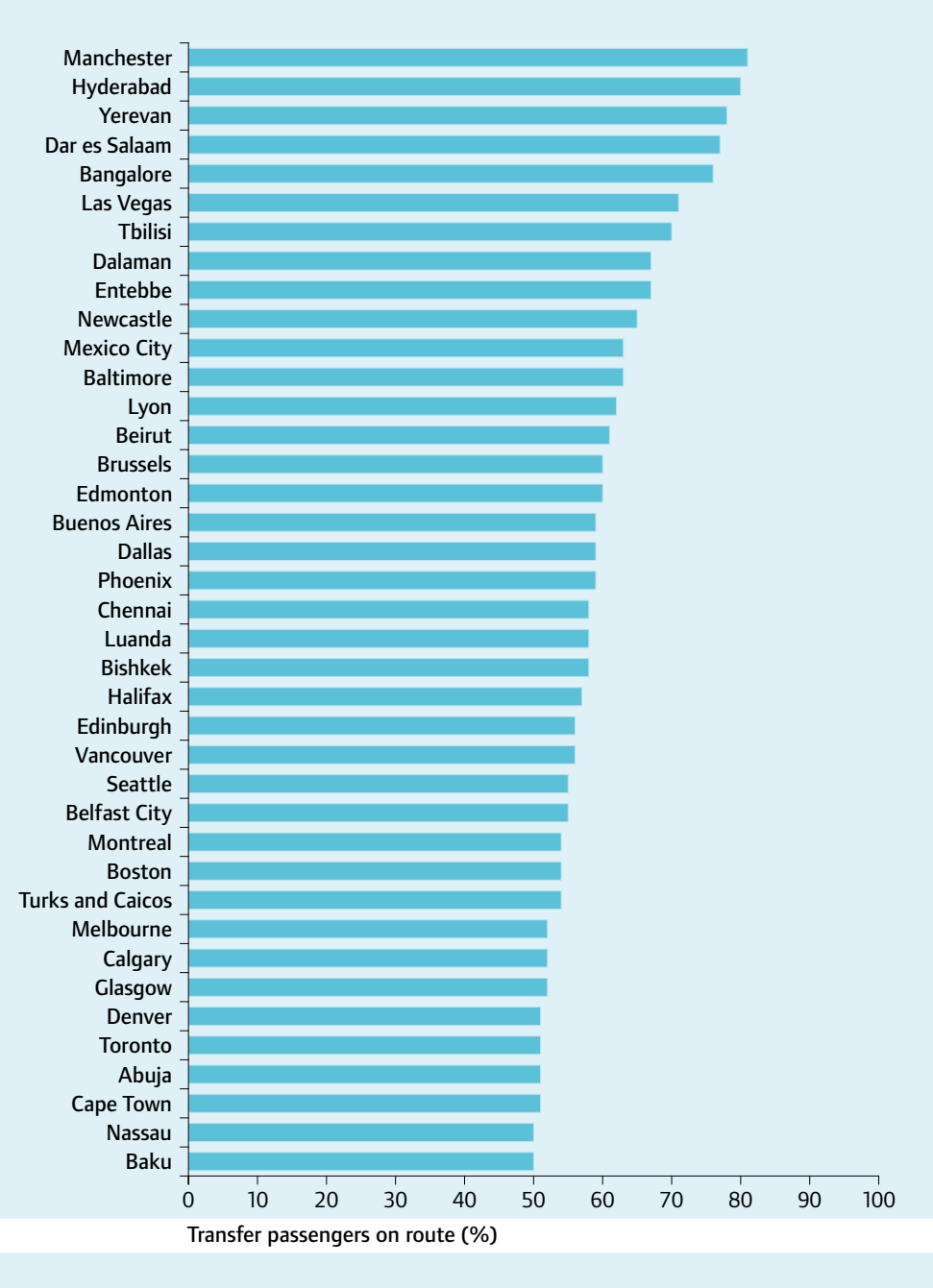
Source: York Aviation

demand alone could not justify the levels of service upon which they depend. These services are reliant to a great extent on revenue generated through the consolidated demand of leisure passengers, including those originating elsewhere and transferring. This works because leisure passengers are more willing to fly indirectly than business passengers, particularly since airlines price indirect flights more attractively. Leisure demand for long haul destinations can therefore be consolidated at hub airports. Belly-hold freight is also important and on some routes can constitute 15 per cent of revenues.

Approximately one third of Heathrow's passengers transfer between flights. This enables a far broader range of long-haul destinations to be served directly and higher frequencies than could otherwise be offered. The routes which have the highest share of transfer passengers are shown in Figure 4.

In economic terms this means that leisure passengers are effectively

Figure 4: The importance of transfer passengers in supporting use of Heathrow as a hub



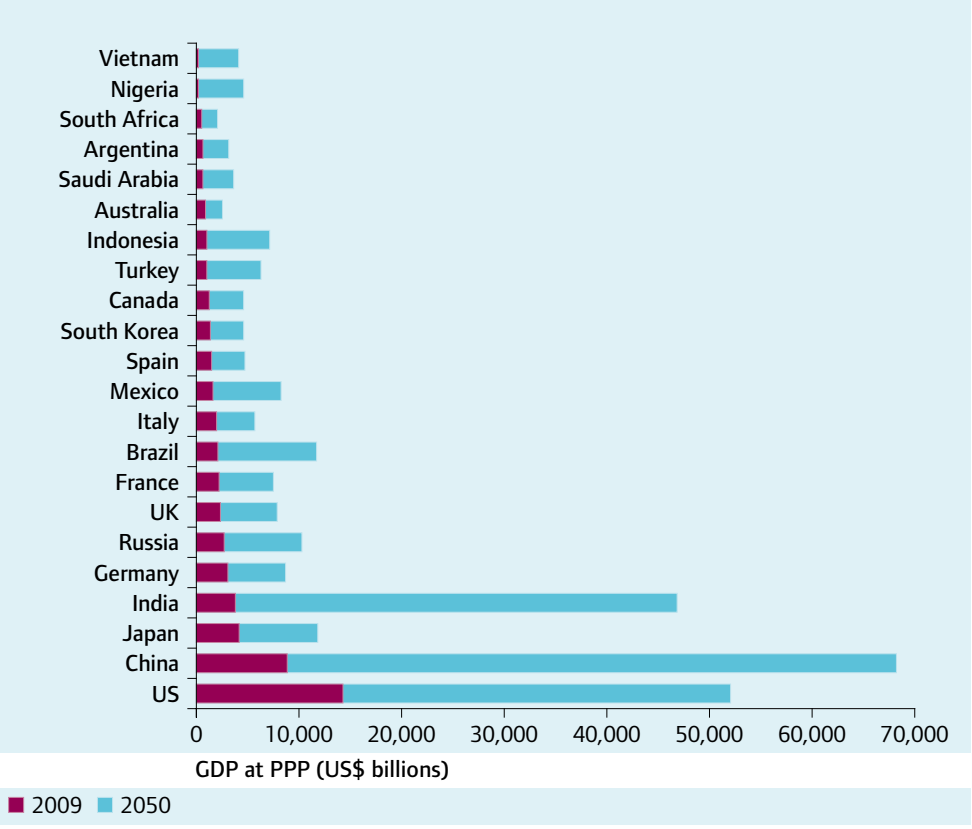
Source: York Aviation, 2011. Derived from (CAA) survey data, 2010.

generating 'positive externalities' to other passengers, including business passengers, which help correct the market failure associated with the high fixed costs of operating direct long distance air services. The strategic importance of a hub is its role in facilitating this commercial model. Without the hub operations, many of the routes available from Heathrow that help generate economic and other benefits would simply not be viable.

The world is becoming increasingly competitive

It is essential to consider the international circumstances in which the UK economy will be competing in the future. Over the course of the next 40 years or so a much higher proportion of the world's population

Figure 5: Growth in GDP of leading world economies, 2009-2050



Source: PricewaterhouseCoopers, The accelerating shift of global economic power: challenges and opportunities, 2011

can be expected to be participating in the global economy, meaning that the UK will be competing for both resources and markets in an increasingly tough, fast-changing world. It is forecast that by 2050 China and India will have overtaken the USA. Each will have much bigger economies than the USA has today. Argentina, which is currently ranked 20th, will have an economy larger than that of the UK today. This changing economic order is illustrated in Figure 5.

One of the strengths on which the UK must build over the coming years is London's status as one of a small handful of truly global cities. The country also needs to move from a position in which the Capital generates wealth to support other regions to one in which the UK's

regions participate more fully in the wealth creation opportunities that London offers, including its global connections.

In this rapidly changing world, London needs to be better connected than ever. While it has good connections to many established markets and traditional trading partners, such as those in North America, the UK's hub no longer has enough spare capacity to respond to market opportunities. As a result new direct services are often established more quickly at competitor airports. This may well have wider economic consequences for the UK, particularly in the case of important emerging economies such as China. The significance of this can be seen in Figure 6 which shows that between 2007 and 2025 a number of Chinese cities are expected to enter the world's top 25 by GDP, ending the current dominance of North American and European cities in the ranking.

The rise of Asia's relative economic importance is further highlighted by consideration in the world's top 25 cities for growth in GDP between 2007 and 2025, which are shown in Figure 7.

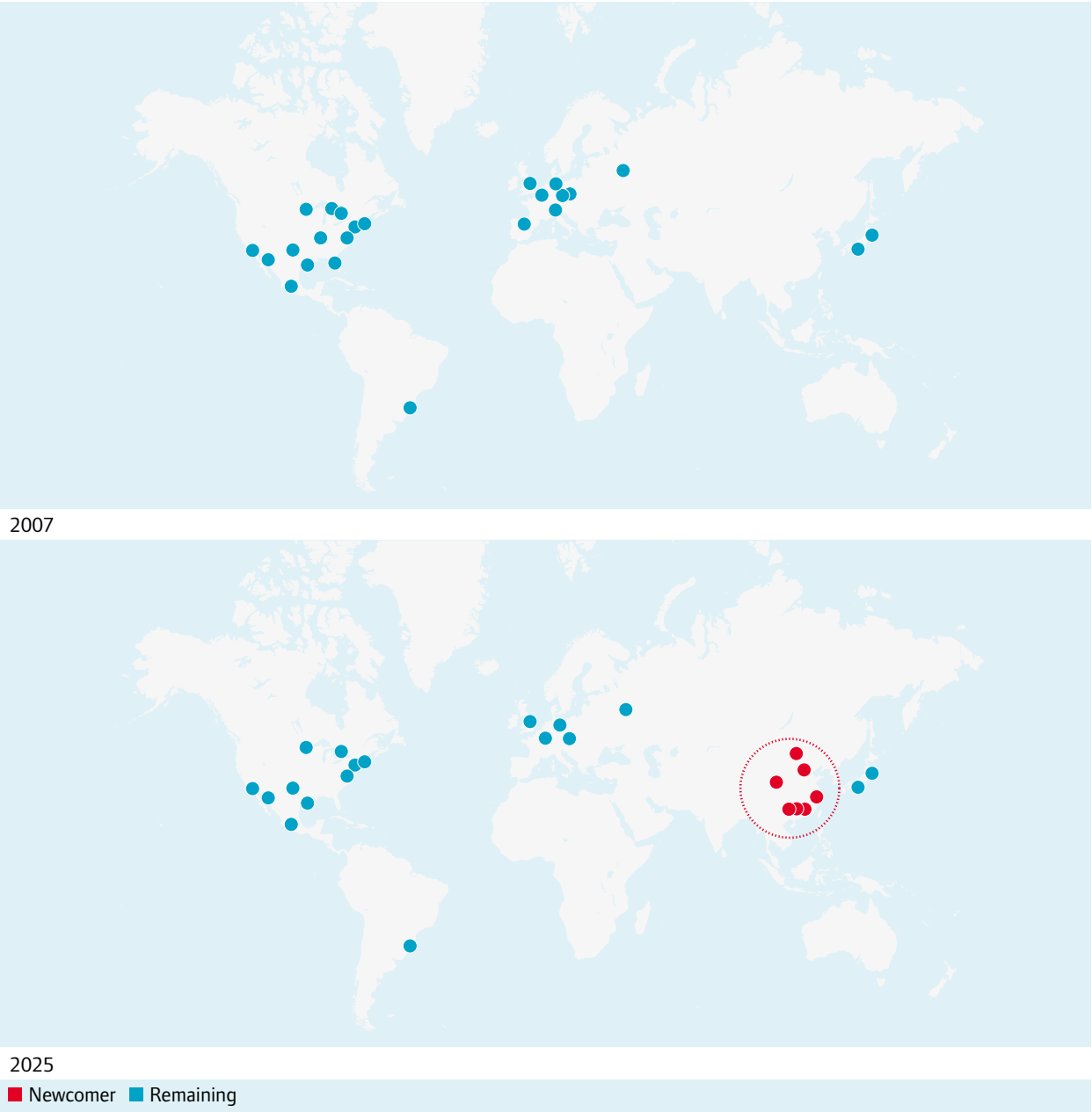
Heathrow is almost full and its performance is suffering

London's and the UK's economy is crucially dependent on access to an effective hub airport that can give it the range and frequency of flights needed to respond to this challenge. Heathrow's performance is already suffering because of its lack of spare runway capacity, which is illustrated in Figure 8.

This results in peak-time delays and very poor resilience when disruption occurs. At busy times, aircraft can spend 30-40 minutes in stacks awaiting a landing slot. There can also be on-ground delays owing to constrained runway and terminal capacity. Taxi out time (time between push back and take-off) at Heathrow is on average 18 per cent longer than at Paris Charles de Gaulle, 31 per cent longer than at Amsterdam and 40 per cent than at Frankfurt[3]. Despite current efforts to improve its infrastructure, these issues will remain and the fundamental environmental problems it poses for large numbers of Londoners will continue, largely unaddressed.

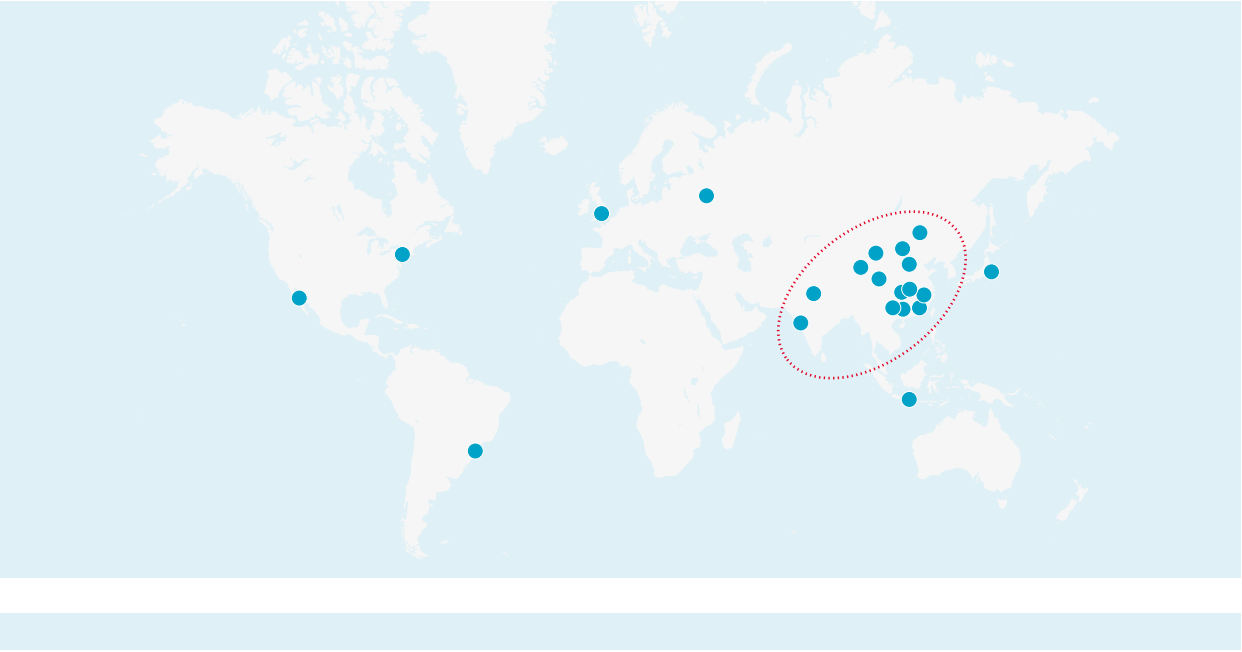
[3] Eurocontrol, ATM Airport Performance Framework, 2009.

Figure 6: Expected change in leading 25 megacities between 2007 and 2025, by total GDP



Source: McKinsey Global Institute, Urban world: mapping the economic power of cities, 2011

Figure 7: Fastest growing cities in terms of total GDP growth between 2007 and 2025



Source: McKinsey Global Institute, Urban world: mapping the economic power of cities, 2011

Heathrow is not responding well to its new challenges

As Heathrow reaches the limits of its capacity, its pre-eminence among international hub airports will be increasingly challenged by European rivals. Indeed, it is important to recognise that, should Heathrow lose transfer passengers and with them routes and frequencies, these flows will not move to other UK airports, but will picked up by the major continental European hubs. For example, industry sources suggest that Munich airport, the newest of Europe's major hubs, would not exist in its current form as a hub airport were it not for the capacity constraints that prevent Heathrow expanding.

This problem manifests itself in the way that Heathrow's lack of capacity affects the UK's ability to modernise bilateral agreements with other countries. London is lagging behind other European cities with hub airports in terms of its links

Figure 8: Comparison of major European airport infrastructure capabilities

Airport	Runways	Current max flights/hour	Future max flights/hour	Current runway utilisation	Destinations served, June 2011
Heathrow	2	87	87	98.5%	192
Amsterdam	6	110	120	70%	277
Paris	4	114	120 (2015)	73.5%	257
Frankfurt	3*	83	126 (2015)	74.5%	291
Madrid	4	98	120	n/a	191

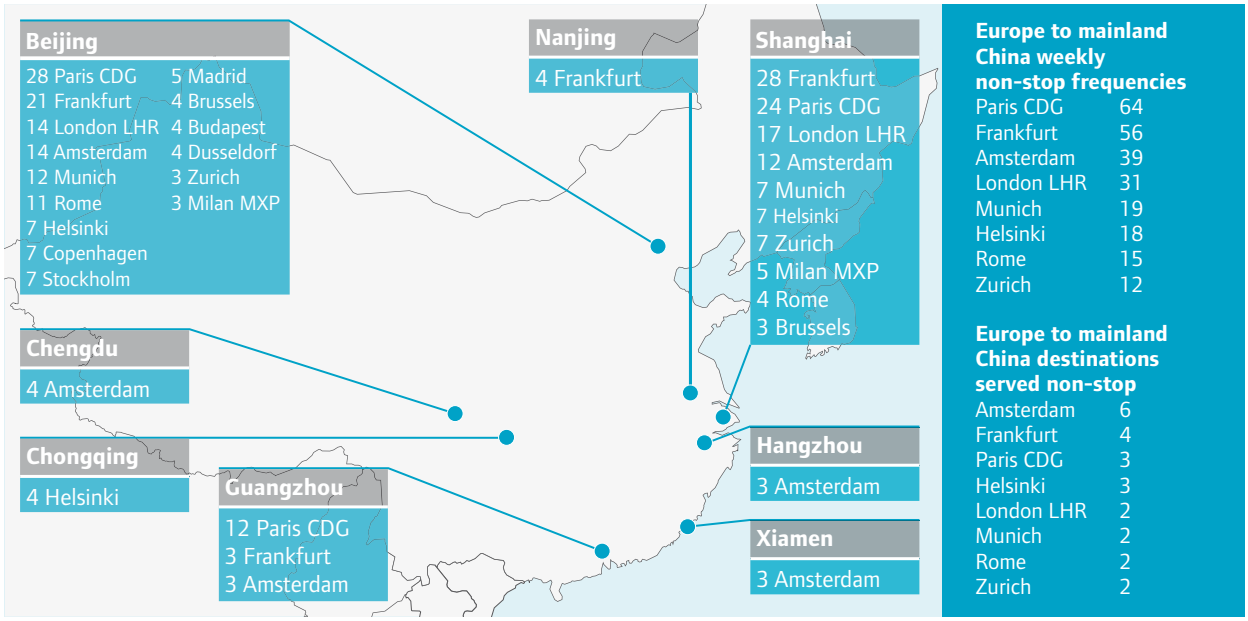
*4th runway being built and due to open in October 2011
Source: Various operators, compiled by TfL

with China. China's biggest airline, China Southern, does not serve the UK, citing poor access to Heathrow as the reason. Given the increasingly important role cities like China will play in the future, this inflexibility and resultant lack of connectivity will have severe consequences for the UK's global competitiveness.

This picture is reinforced when the number of weekly seats is considered. While Frankfurt, Paris Charles de Gaulle and Amsterdam Schiphol offer approximately 17,500, 15,000 and 11,000 seats a week to mainland Chinese airports respectively, Heathrow only offers 9,000. With these airports operating at around 70 per cent runway utilisation, and Heathrow at 98 per cent, it is likely that Heathrow will play a diminishing role in providing access to this rapidly expanding part of the world in the absence of new capacity.

Furthermore when there are very high opportunity costs associated with landing slots, as is the case at Heathrow, there is little incentive for established airlines to take risks with new and untested routes. In the case of China, European rivals have been better placed to set up new routes and gain first mover advantage. Heathrow's position relative to that of other European hubs is shown in Figure 9. It is not the case that there are flights at Heathrow that could be readily relocated without affecting the airport's interrelated network of routes. For example, in summer 2011, cargo-only flights accounted for just 0.5 per cent of slots at Heathrow (using an average of seven of the 1,400 arrival and departure slots per day). Furthermore, the vast majority of these were at the least busy times of day – arriving mid-afternoon and departing late evening.

Figure 9: Current and planned weekly non-stop frequencies from Europe to mainland China



Source: Various airline/airport timetables, June 2011

This will impact not only direct business links but also tourism, with the UK's competitors, such as France, being able to establish valuable visitor markets more easily. In total, France earns £1.3bn per year from Chinese tourist spending, compared to the UK's receipts of £115m from Chinese tourism. Maximising tourism links with countries such as China, which have rapidly expanding middle classes is essential. A range of responses is required to address the UK's disadvantages, including the problems which arise as a result of the UK sitting outside the Schengen zone.

Growing Heathrow is not an option

An early decision of the Coalition Government was to rule out the construction of a third runway at Heathrow. The Mayor welcomed that decision. Even with the additional

[5] Not including flights to and from EU 10 or European part of CIS.

capacity it would have provided, Heathrow would likely be operating at close to capacity again by 2030. Furthermore the other problems it faces would have worsened.

The local environmental and noise consequences of growth would be too great. Already, too many areas are blighted by the noise and other local impacts caused by aviation at Heathrow. Its location is such that more than 250,000 people are significantly affected by noise in excess of 57dB (this compares to 4,800 at Gatwick and 2,500 at Stansted)[6].

Surface access networks are already under stress and would not be able to cope with further growth. While Heathrow has good public transport links with central London, the majority of passengers are travelling from other areas to the airport using private transport. There is severe road congestion around Heathrow owing to the high numbers of private vehicles and taxis used to access the airport and its related activities. Around 25 per cent of vehicles on the M4 and at least 15 per cent of vehicles on the M25 are travelling to and from Heathrow.[7] These roads have the worst delays and reliability record in the UK. Even if demand management tools were implemented to discourage vehicle use, with increasing passenger numbers, congestion would be likely to continue or worsen. If Heathrow were to grow it is clear that its fundamental shortcomings as a location for a major hub airport would only become more pronounced.

Regional airports cannot address the fundamental question of London's constrained hub capacity

In August 2011 the DfT published a new set of aviation demand and carbon emissions forecasts which look forward to 2030 and 2050. They offer an insight into the potential impacts of current government policy, which is to oppose expansion at Heathrow, Gatwick and Stansted, and to maximise use of the UK's existing airport infrastructure.

As a result of current government policy, the DfT foresee that all growth will be at the UK's regional

[6] BAA, Corporate Responsibility Report, 2008.

[7] BAA, Working towards a sustainable Heathrow, 2010

airports beyond 2030. Airports in London and the South East will be full. By 2050, 42 million people a year will be forced to travel from the South East to airports in other regions, while millions of others will be deterred from flying altogether. In fact, demand is concentrated in the South East (60 per cent of all flights in the UK are from these airports), and regional airports are ill-placed to offer airlines a commercially desirable alternative. The argument fails to recognise the commercial importance of a hub airport in serving long haul business demand. In particular London would lose vital business connectivity which is only currently available because of the enormous volume of demand which feeds through Heathrow.

As stated above, while London and the South East are easily Europe's pre-eminent business regions, the business demand they alone generate is still insufficient to justify a network of frequent flights to a wide range of long haul destinations. Airlines rely on the additional revenue provided by leisure passengers (and cargo) to make the network of routes which suits international businesses viable, with adequate frequencies. At Heathrow this includes the huge leisure demand from the London and South East market and a large amount of international transfer passengers. In 2010 there were 39 routes at Heathrow on which more than 50 per cent of passengers were transferring.

If London's hub was to lose large numbers of leisure travellers to other UK and European airports, both from its home market and those transferring, the hub system which supports the network of routes would no longer work. It is clear that no other UK city has the critical mass of demand to support a hub airport and the UK would be left without such a facility. Consequently it would also lose the vital international business connectivity on which its economy depends.

Given the importance of aviation to London's economy, and the UK, a fully functioning hub needs to be located in the South East. Owing to London's pre-eminent position in the national and global economies, the Mayor does not believe that any airport outside of the South East could take on a world-leading hub role.

In other parts of the UK aviation is less integrated in the economic system.

Constraints on aviation connectivity in the South East will therefore have a more complex and profound effect in London than in other regions. The overwhelming reason that airports in the South East are busier is that the population base and economic strength of the region stimulates significant demand for aviation.

For these reasons, the Mayor believes the Government must consider options for providing new effective hub capacity in the South East.

The Government's long-term strategy must plan for an increase in hub capacity in the South East

It is clear that the UK needs a fully functioning international hub that can accommodate the projected number of passengers permitted within environmental limits, and an alternative to Heathrow must be sought. The following requirements would need to be met:

- An efficient, resilient operation that allows rapid recovery from major disruption
- Sufficient runway and terminal capacity to support an extensive route network, including a renewed domestic network between London and the UK regions, and the ability to concentrate flights into 'waves' of arrivals and departures
- Sustainable, high-quality surface access, including connections to both London and the regions, maximising use of public transport and high-speed rail in particular
- A high quality experience that not only provides an appropriate gateway to the UK but is also able to create a favourable impression to transferring passengers
- Adequate convenience and speed of transfer for interlining passengers including competitive connection times

A proposed solution, which is worthy of examination, is that London's airports work together as a 'virtual hub'. It would be a 'world first' and need to overcome considerable technical challenges. A workable method for speedy and convenient transfer, which addresses issues about passenger security and transferring baggage would need to be found. Also, while this proposal might improve the allocation of runway capacity in the South East, it would not in itself increase this capacity.

It should be noted that high-speed rail does not offer a solution as an alternative to aviation. While it can complement air connectivity, it cannot replace the need for it. There is scope for high-speed rail to reduce some of the passenger demand at Heathrow (TfL estimates around 10 per cent). However, for a significant proportion of journeys, including all long and medium haul trips, aviation is the only viable mode of transport.

There are no easy answers as to how London and the UK's long-term hub capacity needs are provided for, but it is clear that something must be done. An optimal hub, offering the level of connectivity necessary, would require at least four runways and meet all the criteria listed above.

The Mayor believes that the Government should develop a long-term strategy for increasing aviation capacity in London and the South East that includes an examination of options for a new hub airport, including a four runway international hub airport in the Thames Estuary.

An airport in the Thames Estuary would provide the economic catalyst that the Thames Gateway has been missing and could be a key part of the UK growth plan. As a major 'spatial economic transformer' the airport would act on a scale not yet seen in the Thames Gateway. The airport offers the potential to develop an airport city in a planned fashion, and in a way not yet seen in the UK, which has always expanded airport capacity on an incremental basis. This contrasts with many of the UK's and London's competitors that have developed strategic, long-term plans for their aviation sectors. This has been to their great advantage, and during a time of profound global economic and social change has enabled access to emerging economies in a way the UK is unable to do.

A Thames Estuary airport would be a long-term high volume, high-capacity hub for the UK. It would resolve the South East capacity issues that will clearly inhibit the UK's competitiveness if it is not provided and provide enormous economic benefits. This new hub would present the opportunity for the UK to create a prestigious new international gateway and demonstrate its capability to deliver ambitious and innovative engineering projects.

Substantial aviation growth can be environmentally sustainable, but local environmental impacts require careful planning

The Mayor fully acknowledges the negative impacts of aviation, especially on climate change, local noise, and air quality. The UK should continue to be at the forefront of efforts to make aviation more sustainable but without shackling the country's economic potential. It is right that aviation demand growth is checked by its environmental consequences and while it is clear that unconstrained passenger growth cannot be accommodated, the Government's Committee on Climate Change has demonstrated that there is still considerable aviation passenger growth permissible within climate change targets.

The DfT's most recent national demand forecasts refer to the EU's Emissions Trading Scheme (ETS) as the mechanism by which aviation demand should be managed in response to the climate change challenge.

The Mayor supports aviation's inclusion in the EU's ETS.

If effective capacity to support London and the UK's demand is not provided, foreign hubs such as Frankfurt, Amsterdam and Paris will grow instead. This leakage would do nothing to combat climate change and would instead severely damage the UK's global competitiveness and UK jobs.

Aircraft noise is destined to remain a significant problem for many years to come. Much progress has been made in recent years, resulting in quieter arrivals, departures and ground operations, but the rate of progress is slowing. Aviation's impacts on air quality and noise are substantial and are an essential consideration in setting future policy.

Given the enormous wider economic benefits associated with London's hub airport and in particular the need for direct international business connections to be maintained and improved, there is a strong case for prioritising hub airport development. Concentrating growth at an effective hub airport would reduce the numbers of

people affected by the noise and air quality impacts of aviation as well as reducing carbon emissions through more efficient activity (eg reduced need for stacking).

A long-term strategy for increasing aviation capacity in London and the South East that focuses on effective hub development would not only concentrate growth at one location. It could also achieve a hub around which development, surface access and housing could be designed to maximise aviation benefits while reducing its environmental impact.

Conclusion

London requires new capacity that can facilitate effective hub operations

Aviation is strategically vital for the UK. The benefits it generates are significant, supporting trade and investment, promoting growth, attracting a highly skilled labour force and connecting people with relatives and friends. A central part of this aviation network must be a fully functioning hub – without this, the benefits of the aviation industry cannot be maximised.

For London to maintain its global position and for the UK economy to thrive, effective hub capacity in the South East is required. Heathrow is unable to provide sufficient capacity to fulfil the requirements of a global city. The UK's only hub is already losing out to its competitors, and if it cannot function effectively, its service offer and all the benefits associated with this will continue to be eroded.

A piecemeal approach that sees flights spread across the country to wherever there is capacity does not recognise the essential role that a hub airport plays and will not work – the commercial viability of many routes would be removed. The Mayor believes the Government must develop a long-term strategy for increasing aviation capacity in London and the South East, and this includes an examination of options for a new hub airport.

This hub airport could allow more flights within the permitted climate change ceiling since it would be much more efficient than Heathrow. By ensuring that the Capital continued to have enough direct flights to an expanding network of globalised cities, it would realise the maximum proportion of the enormous potential economic benefits associated with London's global city role. By having excellent rail and air connections to the rest of the country it could also be a true UK hub airport. It would spread the benefits of London's global links across the country and help people and businesses UK-wide forge new links to build a strong, competitive and inclusive British economy.

In autumn 2011 the Mayor will release A New Airport for London Part 2; demonstrating the economic rationale for new hub airport capacity in the South East. This document will build on the arguments presented in A New Airport for London Part 1, and set out in detail the case for a new hub airport to address the capacity gap and maintain the UK's global competitiveness.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Chinese

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Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন্ নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

Urdu

اگر آپ اِس دستاویز کی نقل اپنی زبان میں چاھتے ھیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız veya adrese başvurunuz.

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

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