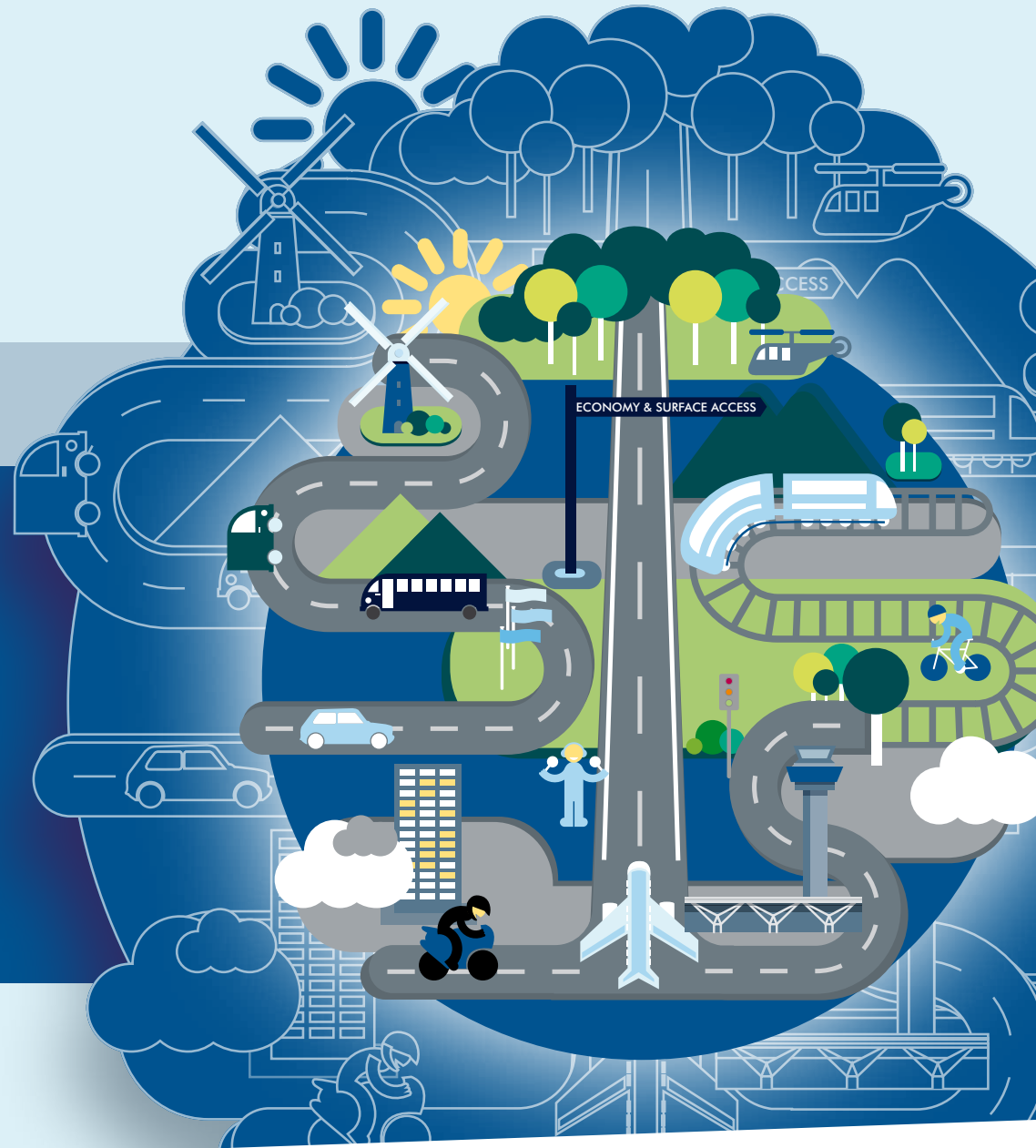


ECONOMY AND SURFACE ACCESS

# SUSTAINABLE DEVELOPMENT PLAN 2015





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### INTRODUCTION

The Stansted Airport Sustainable Development Plan (SDP) is an important document for our airport. It sets out our vision for Stansted's growth of its single runway capacity and addresses some of the key challenges we face in operating a successful airport.



The Stansted Airport Interim Master Plan was published in May 2006 by BAA, the previous owners and operators of Stansted. The Interim Master Plan set out the strategic direction for Stansted as a single runway airport up to 2015 by which time the airport was expected to be serving some 35 million passengers. Since the publication of the Interim Master Plan, the aviation industry and the wider economy have been through major changes. This has had an impact on the rate of aviation growth, both at a national level and at Stansted specifically.

Since acquiring Stansted in February 2013, Manchester Airports Group (M.A.G) has set out a new vision for the airport and we are committed to delivering sustainable growth in its activities. The new SDP is our framework and master plan for growth of the airport based on the capacity of its single runway. It sets out the strategic context for the business, as well as some of the key challenges that we face. A key purpose of the plan is to provide guidance and information to airport users, occupiers, developers, statutory agencies and the local community.

This version of the SDP has been finalised following extensive consultation carried out from June until November 2014. We produced a draft version for consultation with stakeholders and local communities as part of our commitment to engage fully within the region we serve.

The consultation responses and the comments of those who attended the Outreach events were generally positive in support of growth to the maximum capacity of the single runway within our current airport boundary.

Understandably, there were detailed points about the likely impacts of increased aircraft movements and in particular night noise. Concerns over congestion on local roads and quality of rail services were also commonly expressed.

Importantly, there was wide ranging support for our Economy and Surface Access Plan and our Community Plan. Our targets of improving rail connectivity to London and Cambridge and our focus on educational attainment and employment opportunities in the communities served by the airport were welcomed.

The majority of local authorities and stakeholders recognised Stansted's important contribution to the local and regional economy. Many responses supported our efforts to broaden the range of airlines and routes; our positive approach to partnership working; our community outreach programme; the renewed investment in airport facilities; and a positive change in management culture under M.A.G's ownership.

Details of the consultation process and its outcomes are contained within a separate document, the "SDP Consultation Review". This report covers the process, the responses and how we have dealt with the comments received. We are grateful to all those who have helped shape our SDP.



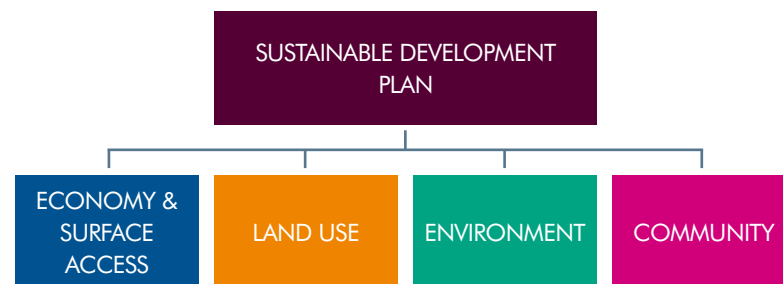
### INTRODUCTION



The SDP sets out the strategic objectives for the growth and development of Stansted. These were supported by stakeholders and run throughout the Plan and underpin our proposals. They are:

- To make Stansted the best London airport;
- Proactively plan for growth to make best use of existing capacity;
- Support economic growth in the region;
- Actively manage and contain environmental impacts;
- Be active and supportive partners in the local community; and
- Maintain Stansted's position as the best in the UK for public transport use.

The SDP comprises four detailed plans that cover the economic context and the surface access proposals for developing our single runway growth strategy, the land use implications and how we intend to develop our environmental and community programmes:



The SDP is a document that will evolve. As such, we will keep the SDP under review so that it remains relevant and reflects the evolution and the development of Stansted Airport. This reflects Government guidance in the 2013 Aviation Policy Framework. The review will be undertaken at least every five years.

### OUR ECONOMY AND SURFACE ACCESS PLAN

This Economy and Surface Access Plan is intended to identify how the airport can support the sustainable growth of the local, regional and national economy and how we can capitalise on and enhance the economic strength of the local area. It also sets our agenda with regard to maximising the connectivity of the airport ensuring that the airport is fully accessible for the catchment we serve.



It is vital that we maintain Stansted's position as a major transport hub, with high proportions of passengers and staff using public transport. We have an enviable level of public transport connectivity which is a key strength of the airport.

It is intended that the strategy outlined in this plan will provide up-to-date input into various long term plans prepared by other agencies and local authorities and support the growth of the region. Importantly, it is intended to provide guidance and information for the airport's users, occupiers, developers, statutory agencies and the local community.

This Economy and Surface Access Plan replaces the 2011-2015 Surface Access Strategy, which was also produced by the previous owners. In preparing this SDP we have reviewed those plans in the light of our new ownership, current airport activity, legal obligations, changes in airline operations and the prospects for future growth.

Stansted is the third largest airport in London and currently handles 20 million passengers per annum (mppa). The airport is firmly positioned as the market leader for low-cost short haul travel in the South East, serving more than 160 destinations in 30 countries. With a strong network of services, the airport provides London and the East of England with valuable international connectivity, predominantly to short haul European and North African markets.

Stansted is a key gateway for the UK and is an important point of entry for non-UK residents arriving by air. Over half of Stansted's passengers are foreign nationals travelling either on business, visiting friends and family or on holiday. This reinforces the important role the airport plays in providing international connectivity both to and from the region<sup>1</sup>.

Over 230,000 tonnes of cargo were transported through Stansted in 2014 helping to connect the economy of London and the region with the global marketplace. Stansted is the busiest airport for all-freighter traffic among the London airports, and is the most significant hub for express freight within the important London market. The airport's express freight market, anchored by key operators such as FedEx and UPS, is the second biggest in the UK.

Stansted is the largest single-site employer in the East of England employing over 10,000 people across 190 on-airport companies. The airport provides a wide range of employment opportunities and supports economic activity throughout the wider supply chain, both within the region and further afield throughout the UK.

# OUR ECONOMIC CONTEXT

## CATALYST FOR GROWTH

Stansted Airport is an important catalyst for growth and productivity in the East of England as well as the North and East of London. Our aim is to maximise our contribution to the economy; support local growth and maintain a fair and sustainable relationship with our supply chain and business partners. This Economic Plan sets out the steps we aim to take to achieve this as we grow the airport.



Today, Stansted already makes a significant contribution to the economic vitality of the East of England region and its wider catchment. As the airport grows towards the full use of the single runway, the scale of this contribution will grow significantly, not only in terms of the direct value of the economic activity at and around the airport, but also through the wider economic benefits associated with improved international connectivity. In this way, Stansted will play a key role in supporting the growth and development of key clusters of economic activity within its catchment.

Our ambition to be the best London airport means that we plan to attract new airlines, increase the range of destinations served and invest in our infrastructure to improve the passenger experience. Stansted will continue to be a major airport for passengers and freight. It is important, given the diverse range of services and destinations that will be provided, that the airport performs as a 'self-connect' hub for airlines. A hub of this nature naturally exploits the range of destinations and network of airlines that fly from our airport and maximises connectivity and reach.





### ECONOMIC GEOGRAPHY

The East of England region is a key driver of the UK economy, and over the last decade it has seen the highest levels of growth in any UK region outside of London.<sup>2</sup> The region has one of the highest employment rates in the country and is home to over 500,000 small and medium sized enterprises (third highest proportion in the UK) with a combined turnover of over £300million<sup>3</sup>.



Silicon Roundabout at the heart of Tech City in East London

Located in the west of Essex, Stansted is strategically placed in the region and at the centre of the burgeoning London-Stansted-Cambridge Corridor (LSCC) – a growth corridor which links the world’s best university with the world’s greatest city<sup>4</sup>. The Corridor is home to a rapidly expanding cluster of businesses in digital and bio-medical science. These businesses generate over £160 billion for the UK economy and with more knowledge-based industries moving in, the corridor is poised for significant growth and investment.

The LSCC Consortium brings together key stakeholders in the Corridor, including the four Local Enterprise Partnerships (London, Hertfordshire, South East and Greater Cambridge and Greater Peterborough) as well as major businesses, local authorities, universities and colleges.

The Corridor’s core characteristics define its future economic potential. For example, there is evidence of strong self-contained economic activity. Oxford Economics<sup>5</sup> estimates that some 8% of the UK workforce lives within the Corridor and it generates around 11% of UK Gross Value Added (GVA), making it a highly productive region in economic terms.

Further, the make-up of sectors within the Corridor align it to London’s economic characteristics more closely than with the East of England generally or the UK as a whole. The growing and innovative companies based in the Corridor compete and operate within international markets and require direct, fast and frequent connections to destinations across

the globe. With further investment, the Corridor has the potential strategic transport infrastructure – in terms of rail, road and air transport – to drive economic growth and productivity in the medium and long term.

### The London-Stansted-Cambridge Corridor (LSCC)



<sup>2</sup> Between 2001 and 2011, the population grew by nearly 8 % to 5.8m.

<sup>3</sup> Office of National Statistics, Regional Profiles: Economy – East of England, May 2012.

<sup>4</sup> LSCC.CO: An Agenda for Jobs, Growth and Improved Liveability, (January 2014, page 4).

<sup>5</sup> Economic Impact of Stansted Scenarios (2013), Oxford Economics.



### ECONOMIC GEOGRAPHY



The Corridor is home to key economic assets of international significance. For example, it contains one of Europe's most enterprising and advanced life sciences clusters, the centre of the UK's information communication and technology (ICT) industry in Cambridge, along with Europe's fastest growing ICT hub in Tech City in East London. Independent research shows the economic region is comparative in scale with the San Francisco Bay area known as Silicon Valley.<sup>6</sup>

Cambridge is a city internationally renowned for its world leading university, high tech cluster, and its ability to foster and develop a culture of learning and innovation. Residents are amongst the most highly qualified in the country with 46% of Cambridge residents educated to degree level, compared to 26% nationally. In the Centre for Cities Economic Outlook 2012, Cambridge is 2nd on the list of "Cities to Watch" based on the high percentage of knowledge workers, number of patents per 100,000 of the population and business start-ups per 10,000 of population (35.8). Cambridge has also been at the forefront of population growth, with a 12.7% increase in residents between 2001 and 2011 – the fifth highest increase in the UK.

#### KEY COMPONENTS OF THE LONDON-STANSTED-CAMBRIDGE CORRIDOR

- **CAMBRIDGE CLUSTER** – 1,500 technology companies located around Cambridge employing around 53,000 people and with a combined annual turnover of nearly £12 billion. Companies include: Astra Zeneca, Aurasma, Genzyme, Medimmune and ARM Holdings;

- **THE CITY OF LONDON** – the world's foremost financial centre employing up to 400,000 people;
- **TECH CITY** – 1,300 tech companies in East London (increase of 1,100 since 2009) including Google, Microsoft and Amazon;
- **HARLOW AND ALCONBURY ENTERPRISE ZONES** – key growth area for life sciences, medical technology and pharmaceuticals; and;
- **UPPER LEA VALLEY OPPORTUNITY AREA** – covers 3,884 hectares in North East London and is earmarked for over 20,000 homes by 2031.

The Harlow Enterprise Zone (EZ) in Essex is one of 24 nationally designated enterprise zones. Comprising two sites – London Road and Templefields, it offers the potential for significant economic growth in the key growth sectors of life sciences, advanced manufacturing and ICT. The enterprise zone sites offer opportunities to attract major inward investment and deliver an estimated 5,000 jobs over the next 25 years.

Key to achieving the successful development of the Harlow EZ is the provision of high quality, modern business space that meets the needs of businesses in the key growth sectors and improvements to site access and infrastructure including proximity to the airport.

<sup>6</sup> Combined Districts' population local to Stansted is approximately 10.5 million with an economy worth \$515 billion, which is on a par with the San Francisco Bay Area economy valued at \$535 billion, with a population of 7.15 million in 2011.

### ECONOMIC GEOGRAPHY



The airport is also a key node on the A120 strategic corridor within Essex that links to the Port of Harwich, known as the Haven Gateway. The key stated growth sectors in Essex County include advanced manufacturing; finance and business services; life sciences; and ports and logistics. The ports and logistics sector in this corridor has a turnover of £3bn per annum and employs over 32,000 people<sup>7</sup>. With investment, the economy could grow by £1.3bn<sup>8</sup>. It is a key part of Essex's economic potential in terms of economic and housing land supply as well as labour force. It will be a direct contributor to, and beneficiary of, the growth of the airport as a result.

It is clear from the above that the airport is located within an area which has strong economic capacity and significant future potential and it has a key role to play in providing international connectivity, which acts to both sustain and drive economic growth, inward investment and productivity.

At a more local level, a study by Oxford Economics<sup>9</sup> shows that the economic activity around Stansted is more evenly weighted between professional and industrial sectors than for the LSCC as a whole. There is also a low level of unemployment in the local authority areas around Stansted, with 3% unemployment within Uttlesford and 4% unemployment in East Hertfordshire<sup>10</sup>. However, there are also areas of high unemployment within Stansted's catchment, including Harlow, Enfield and Haringey.

In recognition of this potential, we are committed to working in partnership with other stakeholders across the region so that we maximise the value of Stansted's economic contribution in a sustainable and responsible way.

We believe this can be achieved by ensuring the benefits of Stansted are felt by those in the region who stand to benefit the most, particularly those living in areas of high unemployment or in need of economic regeneration.

#### CASE STUDY – EAST LONDON IS GROWING FASTER THAN WEST LONDON

Historically, West London has generated more economic activity than East London. However, independent research commissioned by M.A.G shows that between 1997 and 2011, the annualised growth rate for East London was 7% compared to 5.5% for West London.<sup>11</sup> This shift towards the east of the Capital has been driven by the regeneration policies associated with the 2012 Olympic and Paralympic Games and the success of the Canary Wharf business district. The Government has committed to capitalise on the Olympic legacy and over the next decade substantial population growth is forecast, with tens of thousands of new homes and jobs planned in key centres like Stratford, Barking Riverside and Royal Docks Enterprise Zone. As Stansted is the closest major airport to the East End with direct access via the M11, the airport is in a strong position to benefit from London's continuing growth to the East.

<sup>7</sup> Haven Gateway Partnership: Driving the Haven Gateway Forward- The Economic Impact of the Ports & Logistics Sector (2011).

<sup>8</sup> Haven Gateway Partnership: The Case for the A120 Enterprise Corridor, (2014).

<sup>9</sup> Economic Impact of Stansted Scenarios (2013), Oxford Economics.

<sup>10</sup> Other local authority areas with the LSCC show unemployment to 5%, Essex County to 8% and the national average is 7.4% (ONS, May 2014).

<sup>11</sup> Research undertaken by Oxera and Steer Davies Gleave and based on GVA per capita growth, 1997 – 2011.

### STRATEGIC RECOGNITION OF THE AIRPORT'S ROLE

Over the next decade, as London increasingly grows to the East, Stansted has a crucial role to play in driving economic prosperity across both the Capital and the East of England. Key stakeholders across the region, including local authorities and Local Enterprise Partnerships (LEP), have recognised Stansted's potential in recently published policy statements concerning economic growth.



We set out below a summary of how these organisations view Stansted's connection with the local and regional economies.

#### LOCAL ENTERPRISE PARTNERSHIPS

The airport is within two LEP areas: the South East LEP and the Greater Cambridge/Greater Peterborough (GCGP) LEP. A key element of growth for both LEPs is to strengthen the competitive advantage of strategic growth locations within the LEP areas; Stansted Airport is one such location.

The strategic growth plan for the South East recognises that 'in Stansted Airport, the LSCC has a key economic asset with significant potential to catalyse growth across the corridor and beyond'<sup>12</sup>. 'Growth opportunities astride the A120 corridor result in potential for the districts of Braintree, Colchester and Tendring. These arise as result of access to Stansted Airport and the ports of Harwich and Felixstowe'<sup>13</sup>.

As a result, the plan recognises that there is a need to commit to investment in infrastructure targeted at key sites within Essex's strategic growth corridors (including the West Essex M11 and A120)<sup>14</sup>. The GCGP LEP further promotes improvement to transport services and connections, and connectivity and access between transport modes to improve economic growth. It also recognises the opportunity to increase international reputation, investment and trade; Stansted being a gateway to such markets<sup>15</sup>.

To support this growth, the plan promotes a partnership approach to delivering major infrastructure, involving Highways England<sup>16</sup>, Network Rail, local authorities and M.A.G. It is envisaged that these parties should work together to determine the right package of infrastructure improvements required to support Stansted's development, which will underpin economic growth in the corridor and in Essex. We will seek to play our full part in this partnership.

The airport is also situated to the immediate east of the Hertfordshire LEP. This LEP area also forms part of the LSCC. Although the airport is not within the LEP's boundary, the Partnership recognises Stansted as an opportunity for the growth of east Hertfordshire<sup>17</sup>.



GREATER CAMBRIDGE  
GREATER PETERBOROUGH

ENTERPRISE PARTNERSHIP



<sup>12</sup> South East LEP: Growth Deal and Strategic Economic Plan 2014 (March 2014, page 124).

<sup>13</sup> South East LEP: Growth Deal and Strategic Economic Plan 2014 (March 2014, page 44).

<sup>14</sup> South East LEP: Growth Deal and Strategic Economic Plan 2014 (March 2014, page 114).

<sup>15</sup> Greater Cambridge Greater Peterborough Local Enterprise Partnership: Operational Plan 2013/14 (April 2013).

<sup>16</sup> From April 2015.

<sup>17</sup> Hertfordshire LEP: Perfectly Placed for Business, Hertfordshire's Strategic Economic Plan (March 2014, page 23).

### STRATEGIC RECOGNITION OF THE AIRPORT'S ROLE



#### ESSEX COUNTY COUNCIL – THE ECONOMIC PLAN FOR ESSEX (EPfE)

In April 2014, Essex County Council published its Economic Plan<sup>18</sup>, setting out its vision for the County's sustainable economic growth for the benefit of the local communities over the next seven years (2014-2021). This strategy is based on improving skills across Essex, establishing a pipeline of £1bn of infrastructure investment and enhancing productivity across five growth sectors.

The EPfE recognises that the development within this period will come from the private sector, with the public sector creating the right conditions for growth. In tandem with this, the location of Stansted Airport is acknowledged as having a direct and substantial impact on the economic growth potential, particularly as a result of allowing the airport to reach its full 'best use' potential in the short term.

Across the County, the EPfE poses key challenges: enhancing the workforce; unlocking growth on strategic corridors; enhancing productivity; developing the County's reputation; removing resistance to development and the capacity to support growth.

We believe that the airport can directly assist with many of these challenges. Specifically, we can help to improve the reputation of the County through maintaining and enhancing the airport as a key gateway to the County and beyond, assist in developing the workforce through our on-site Employment and Skills Academy (see below and also the Community Plan) and also playing a key role in the strategic LSCC.

Indeed, the EPfE recognises the airport as a "key economic asset with significant potential to catalyse growth along the corridor [LSCC] and beyond"<sup>19</sup>. We will ensure that the investment and

growth of the airport assists in developing the growth potential for Essex and the wider East of England region.

#### UTTLESFORD DISTRICT – ECONOMIC DEVELOPMENT STRATEGY 2012-2014

The airport sits within Uttlesford District. The Council's Economic Development Strategy 2012-2014<sup>20</sup> sets its intention to increase the percentage of Uttlesford businesses exporting; to promote and attract inward investment, including foreign direct investment and expansion of existing businesses; and increase tourism in Uttlesford. The Strategy acknowledges that the locational benefits of the airport in relation to the district are vital in meeting these aims and we are fully supportive of this objective.

The District's Strategy recognises that there is a local work force with high-level skills, a high employment rate, excellent connectivity and that the airport employs around 1 in 12 residents. Despite this, there is a comparatively low enterprise culture, economy size and businesses that trade internationally, which are threats to the district's economic future. In addition, an imbalance in the range and mix of skills, as well as rural geography limiting access to employment provide distinct local challenges.

We believe that the airport can have a positive impact on addressing these threats, particularly through providing on-site employment opportunities as well as being a gateway for trade and inbound tourism.

<sup>18</sup> Essex County Council: Economic Plan for Essex (April 2014)

<sup>19</sup> Essex County Council: Economic Plan for Essex (April 2014, page 45)

<sup>20</sup> Uttlesford District Council: Uttlesford Economic Development Strategy 2012-2014, (October 2012)



### STRATEGIC RECOGNITION OF THE AIRPORT'S ROLE



#### HARLOW ENTERPRISE ZONE

Harlow Enterprise Zone occupies a strategically significant site adjacent to the M11, with its proximity to Stansted making it a premier business location. The 51 hectare site is divided into three specific areas that focus on providing high quality, modern business space for the ICT, advanced manufacturing and life sciences sectors. By 2015, it will be the home of Anglia Ruskin University Med Tech Campus – one of the world's largest health innovation spaces, delivering research and development services to businesses working in the health and life sciences sectors.

Over the next decade the Enterprise Zone is looking to attract over 100 businesses and create 2,500 jobs with the potential to create 5,000 jobs over a 25 year period, driving inward investment along the corridor and West Essex sub region. The airport's connectivity to European life science clusters such as Gothenburg in Sweden and Lyon in France as well as express air freight facilities have been cited as key attractions to global companies looking to relocate to the UK<sup>21</sup>.

#### NORTH LONDON BOROUGH – UPPER LEA VALLEY OPPORTUNITY AREA PLANNING FRAMEWORK

The Upper Lea Valley Opportunity Area covers 3,884 hectares shared between the London Boroughs of Enfield, Haringey, Waltham Forest and Hackney and we believe that it is a key source of future employment for the airport. According to the planning framework<sup>22</sup> adopted in July 2013, the goals of the regeneration plan include development and redevelopment opportunities along the A10/A1010 Corridor, in particular the Tottenham High Road Corridor

and Northumberland Park in North East London; the creation of over 15,000 new jobs by 2031 across a range of industries; a green industrial hub creating greater learning and employment opportunities and over 20,100 new homes by 2031.

In June 2014, the Mayor of London also announced that Tottenham Hale – a key gateway to Stansted Airport – will become one of 20 new housing zones and benefit from additional funding to help kick-start housing on brownfield sites across London.

#### HAVEN GATEWAY PARTNERSHIP

Stansted Airport is a key member of the Partnership, formed to drive economic growth along the A120 corridor between the airport and the ports of Harwich and Felixstowe. The corridor has the potential to attract significant housing and business growth over the next decade and is highlighted as a key growth area in the South East LEP Strategic Economic Plan. The Partnership's A120 campaign<sup>23</sup> to dual key sections of the A120, will dramatically improve road access between the airport and ports to unlock wider growth in the region.

<sup>21</sup> [http://harlowez.org.uk/?page\\_id=243](http://harlowez.org.uk/?page_id=243).

<sup>22</sup> Upper Lee Valley Opportunity Area Planning Framework, (July 2013).

<sup>23</sup> Haven Gateway: A120 Driving Economic Growth.

### ECONOMIC IMPACT OF THE AIRPORT

Stansted is strongly positioned to act as a catalyst for economic growth within the region, and it can respond positively to the challenges identified above in the regional and local strategies. By working in partnership, we believe we can strengthen our own contribution as a source of economic benefit.



The scale of Stansted's economic contribution can be demonstrated with estimates of its economic impacts, the potential for direct interventions in the local economy, and through improvements to connectivity within the local and regional economy. The following sections describe these benefits and our approach to realising this potential.

The airport brings a range of economic benefits. These can be summarised into the following categories:

- **DIRECT BENEFITS:** providing direct employment on site, for the benefit of the local and wider population;
- **INDIRECT/SUPPLY CHAIN BENEFITS:** local, regional and national companies providing employment as a result of supplying goods to the airport and its partners;
- **INDUCED BENEFITS:** the spend within the local area and region as a result of direct and indirect employment and the acquisition of services and goods; and
- **SPIN OFF BENEFITS:** including tourism, foreign investment and support for local businesses as a result of the reputational advantages and connectivity that an international airport brings.

### SCALE OF BENEFIT

Stansted is the largest single-site employer in the East of England, employing over 10,000 people across 190 companies on site. This highlights its importance to the East of England economy and to Essex in particular where over half of the people working at the airport live. Stansted generates around £770m million in GVA, of which a substantial proportion is derived directly from activities associated with aviation and air transport. Other important sectors include construction, retail and hospitality, services and 'other' transport activities.

Stansted is an important gateway for inbound tourism. It is one of the UK's key gateways and an important point of entry for non-UK residents arriving by air. Over half of all passengers using the airport are foreign nationals travelling either on business, visiting friends and family or on holiday. Currently, the majority of airlines flying from the airport are short haul low cost airlines. A study by York Aviation identified that the liberalisation of the aviation market, and the resulting increase in low cost flights and connectivity, boosts local economies through the creation of jobs in the regions surrounding airports<sup>24</sup>. It also contributes to the stimulation of tourism and expenditure by enhancing the investment climate. Our competitive advantage of being the only London airport with spare capacity, alongside our ambitious plans for improvement of the airport's facilities, will enable us to attract key new routes (both business and tourist) and a broader range of airlines, including full service scheduled carriers.

<sup>24</sup> Social benefits of Low-Fare Airlines in Europe (2007), York Aviation, Section 4

### ECONOMIC IMPACT OF THE AIRPORT



The table below compares different measures of Stansted's economic impact in 2013 with those associated with passenger throughputs of 35mppa and 45mppa. The table shows that Stansted already facilitates significant benefits to the East of England and London regions, and that the scale of these benefits will increase as the airport grows towards the full capacity of its single runway.

#### CURRENT AND FUTURE ECONOMIC IMPACT OF STANSTED AIRPORT<sup>25</sup>

	2013	35 mppa case	45 <sup>26</sup> mppa case
Passenger numbers (mppa)	17	35	45
On-site employment	9,833	18,800	19,647
Economic contribution/ annum (£m)	774	1,546	1,980
Direct on-airport income (£m)	184	352	367
Direct off-airport income (£m)	4	7	7
Indirect income (£m)	91	174	182
Induced income (£m)	164	314	328

The table shows that the value of Stansted's economic contribution will grow in the future as traffic volumes increase. In particular, a doubling of on-site employment and over £1.5bn of added value.

Stansted's economic value can be expressed in terms of its net present value (NPV) to give an overall view of its future potential. The table below shows the NPV of the direct incremental output (i.e. only considering activities at the airport itself) associated with growth to the full capacity of the single runway.

#### DIRECT ECONOMIC IMPACT OF STANSTED UNDER DIFFERENT SCENARIOS

	35 mppa case	45 <sup>27</sup> mppa case
Passengers/Year	Growth to 35mppa by 2025	Growth to 45mppa by 2030
Total Direct GVA (£m PV, 2013–2040)	23,267	26,073
Incremental Direct GVA (£m NPV <sup>28</sup> , 2013–2040)	1,779	4,585

Source: M.A.G estimates

<sup>25</sup> Source: Stansted (2012), 'Draft Aviation Policy Framework – London Stansted Airport's Response', October 31st; Stansted website facts and figures; Tribal (2008), 'G2 Project: Economic Impact Report', November; Oxford Economics (2013), 'Economic Impact of Stansted Scenarios' November.

<sup>26</sup> For the purpose of the data in this table, the study used a figure of 45mppa. The exact maximum passenger throughput figure is likely to be between 40 and 45 million passengers a year and will be a product of our route network, aircraft size, the spread of traffic through the day and year and the capacity drivers described earlier (see Our Approach: Growing our Airport in the SDP Land Use Plan).

<sup>27</sup> See footnote 22.

<sup>28</sup> Net Present Value (NPV) is the comparison of present value today to the present value of money in the future, taking likely inflation into account.

# OUR ECONOMIC IMPACT

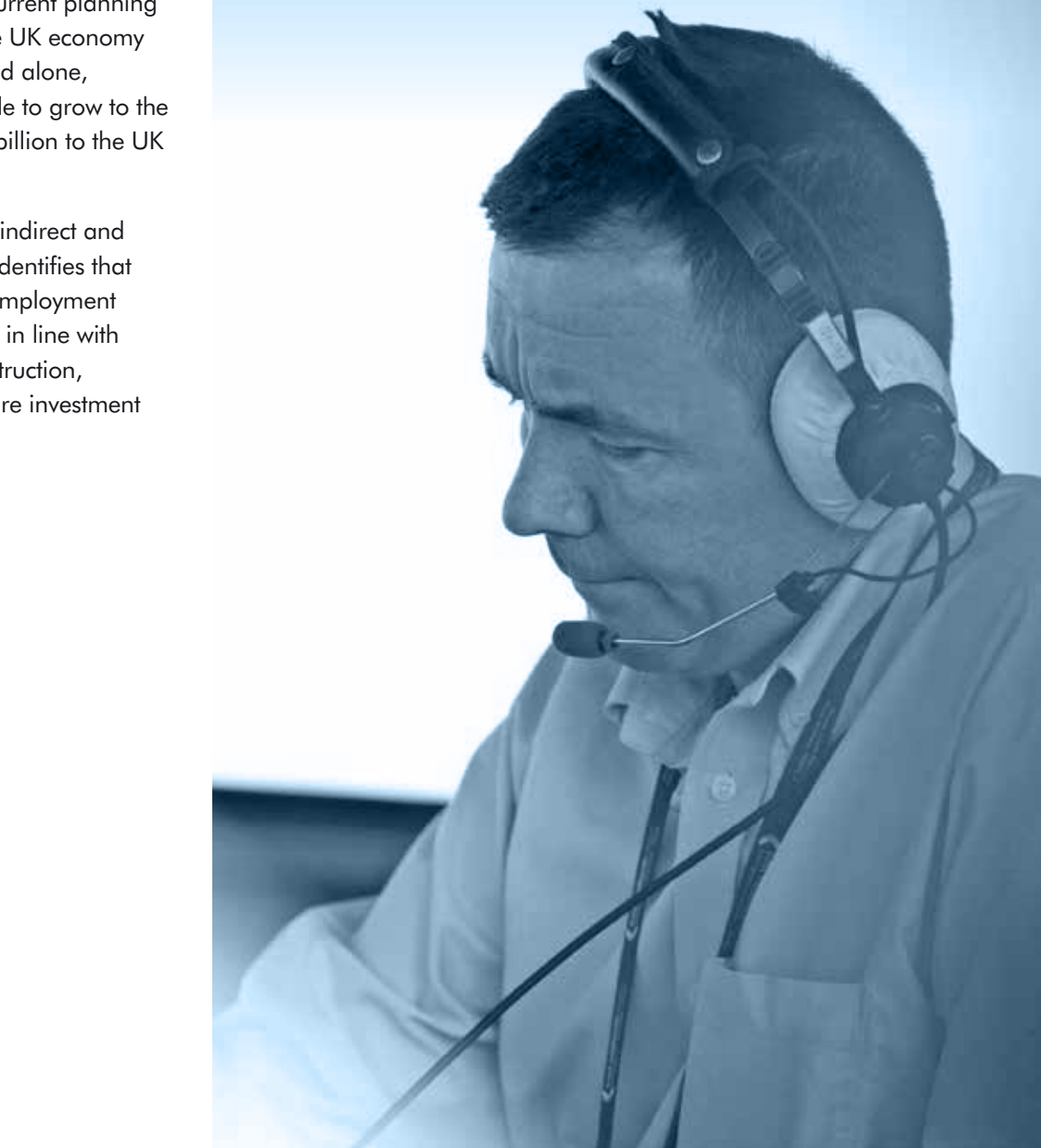
## ECONOMIC IMPACT OF THE AIRPORT



Thus, if Stansted was able to achieve 35mppa (the current planning cap) by 2025, this would be worth £1.7 billion to the UK economy in present value terms, through the impact at Stansted alone, compared to business as usual. If the airport was able to grow to the capacity of its single runway it would be worth £4.6 billion to the UK economy and an extra 10,000 jobs.

These estimates would be substantially greater if the indirect and wider effects are incorporated. Oxford Economics<sup>29</sup> identifies that growth of the airport would result in an increase in employment (both direct and indirect) across all sectors, with rises in line with passenger growth for virtually all sectors except construction, which would see peaks during periods of infrastructure investment at the airport.

SUSTAINABLE DEVELOPMENT PLAN  
ECONOMY





### ECONOMIC IMPACT OF THE AIRPORT



#### CARGO IMPACT

The transport by air of goods is of national significance and economic importance. HM Revenue and Customs reported air freight represented 43.3% of UK exports to countries outside of the EU by value in 2012. All regions of the UK need easy access to global air freight connectivity if they are to contribute to the Government's objectives of re-balancing the economy and promoting export-led growth. The principal routes for air freight in and out of the UK are the trans-Atlantic routes to the United States and also routes to the major Asian economies. The Asian air freight market is growing at around 19% annually. In the UK, express freight has grown over the last decade, both in total and as a proportion of air cargo and it is estimated that express freight represents 25% of the total UK air cargo market. The UK's principal express freight airports are East Midlands and Stansted.

The express freight sector is important to the UK and it is estimated to contribute some £2.3bn to UK GDP (2010) and to enable £11bn of UK exports annually<sup>30</sup>. Express services are used by a number of sectors of the economy but are used primarily to achieve the next-day delivery of goods and documents, allowing UK businesses to compete in the global market. These services have to be provided by air. Next-day deliveries are part of 'just-in-time' production systems and reduce the high cost of warehousing and enable businesses to achieve rapid, time-definite delivery of high value goods and documents across the world. Although the value of export shipments by the express freight operators is substantial, they do underestimate the true value of the goods carried. This is because they can be, for example, essential spare parts for a manufacturing process with a sale price of a few hundred pounds but without the part, lost production could carry costs of thousands or millions of pounds.

Maintaining a network of international connections is vital to UK business and to the UK economy. Surveys undertaken by Oxford Economics<sup>31</sup> have shown that 80% of the UK businesses surveyed stated that their business would be badly affected if international next-day deliveries were no longer available. UK businesses are more dependent on express services than those based in continental Europe. In part this is due to the UK's success in attracting foreign inward investment and may also reflect the fact that the UK is an island. These businesses operate international supply chains that also include just-in-time inventory systems. These processes rely heavily on express freight services. In their research Oxford Economics concluded that, should next-day delivery services not be available in the UK, then UK GDP would be reduced by £3bn annually. This is due to the disruption to the logistics network and the adverse effects on business investment.

As the express freight operators' product is next-day or guaranteed delivery, in the UK packages are generally collected at the end of the business day for delivery early the following day. For this schedule to succeed, the main part of the delivery and transportation process needs to take place during the night. Night flights will always be vital to UK express freight services and this is provided at Stansted Airport.

<sup>30</sup> Association of International Courier and Express Services (AICES) submission to the Airports Commission – Discussion Paper 2: Aviation Connectivity and the Economy 2013.

<sup>31</sup> The Economic Impact of Express Carriers in Europe: United Kingdom. Oxford Economics 2011.

# OUR ECONOMIC IMPACT

## ECONOMIC IMPACT OF THE AIRPORT



### EMPLOYMENT

Very low levels of unemployment in the immediate vicinity of the airport mean that the airport has the potential to be an important source of economic benefit to the wider region – providing jobs and opportunities for residents across Essex, North and East London and other parts of the East of England region.<sup>32</sup> In this respect, effective surface access connections to and from Stansted are necessary to ensure that the economic benefits are experienced regionally as well as locally. For example, Oxford Economics found<sup>33</sup> that the airport offers young people (in the 16-25 age group) proportionally greater opportunities compared to the opportunities available in the LSCC as a whole. For this reason it is important that Stansted offers young people accessible transport choices so that they can take advantage of employment opportunities at the airport.

<sup>32</sup> Office of National Statistics and Department for Work and Pensions data compiled by the House of Commons Library shows that in November 2014 jobseekers claimant rates were 0.9% in Saffron Walden and 1.1 % in Hertford and Stortford constituencies.

<sup>33</sup> Economic Impact of Stansted Scenarios (2013), Oxford Economics, paragraph 3.1.2.



### EMPLOYMENT AND THE STANSTED AIRPORT EMPLOYMENT AND SKILLS ACADEMY

**We are committed to playing our part in addressing the issues of youth unemployment, access to jobs and skill levels at all our airports. We take a responsible and considerate attitude to being an integral part of the communities we serve and we also take pride in making a positive contribution to regional prosperity and economic development.**



At a practical level, we have put in place a proactive education and employment programme that is designed to create more opportunities for local people and support the education and aspirations of the airport's future workforce. Our education programme focuses on engaging with young people, particularly those living close to the airport, through work experience and apprenticeship programmes, using the facilities of the Stansted Employment and Skills Academy to promote the breadth of opportunities that are available on-airport and an understanding of career pathways.

The Academy opened in March 2008 and is managed by Urban Futures, a skills and regeneration agency based in north London. The Academy is based adjacent to the terminal building and is continuing the best practices derived from the London Stansted Employment Partnership (LSEP). The Academy promotes opportunities for development, training and career progression at the airport across areas of north and east London, covering the London Boroughs of Haringey, Enfield, Waltham Forest, Newham, Tower Hamlets, Hackney, Havering and Redbridge. Locally within Essex, it works collaboratively with training providers including Harlow College, and others located within Uttlesford, Epping, Harlow, Braintree, Colchester and Chelmsford".

The Academy is also providing a service to individuals looking for employment at the airport, regardless of where they live, and a tailored service to meet the needs of airport employers. Urban Futures works closely with other key stakeholders, including Jobcentre Plus and local colleges and further education institutes to ensure there is a joined-up approach to identifying individuals and matching them to training and employment opportunities at Stansted. In 2013, 450 on airport jobs were filled via the Academy.

### IMPORTANCE OF CONNECTIVITY TO THE AIRPORT

Civil Aviation Authority (CAA) research found that 55%<sup>34</sup> of passengers use the cost and convenience of getting to an airport as a key reason for choosing it over other local options. This factor was ranked second only to the availability of services (chosen by 56% of passengers). This finding highlights the importance of surface access in the consumer journey and emphasises its importance in attracting passengers and employees to the airport.



Academic research consistently identifies clear linkages between the quality of transport connections and the level of economic development. When transport systems are efficient, they provide economic and social opportunities and benefits that result in positive multiplier effects such as better accessibility to markets, employment and additional investments. When transport systems are sub-standard in terms of capacity or reliability, they can have an economic cost such as reduced or missed opportunities and lower quality of life<sup>35</sup>.

In a similar way to the economic impact of the airport, transport connectivity has economic impacts that are direct, indirect and related:

- **DIRECT IMPACTS** (also known as induced) the outcome of accessibility changes where transport enables employment, added value, larger markets and saves time and costs.
- **INDIRECT IMPACTS** the outcome of the economic multiplier effects where the price of commodities, goods or services drop and/or their variety increases. Indirect value-added and jobs are the result of local purchases by companies directly dependent upon transport activity. Transport activities are responsible for a wide range of indirect value-added and employment effects, through the linkages of transport with other economic sectors (e.g. office supply firms, equipment and parts suppliers, maintenance and repair services, insurance companies, consulting and other business services).
- **RELATED IMPACTS** the outcome of economic activities and firms partly relying on efficient transport services for both passengers and freight. International headquarters or major firms as well as manufacturers and retail outlets and distribution centres, handling imported containerised cargo, rely on efficient transport and seaport operations.

Economies that have good connectivity and mobility – both domestically and internationally – are well placed to take advantage of economic opportunities.

<sup>34</sup> Better Information about UK Aviation: Consultation on the CAA's New Publication Duties (May, 2013), Civil Aviation Authority.

<sup>35</sup> See for example, Transportation and Economic Development: Dr. Jean-Paul Rodrigue and Dr. Theo Notteboom (2013).



# OUR ECONOMIC IMPACT

## IMPORTANCE OF CONNECTIVITY TO THE AIRPORT



Greater mobility is a catalyst for development, while reduced mobility impedes development and constrains growth. Mobility is thus a reliable indicator of development potential. Oxford Economics has acknowledged<sup>36</sup> that the growth of Stansted will have a wide range of spin-off benefits, as described above.

In particular, good connectivity will provide strong support for the growth of tourism across the Eastern region and London. In this respect, improving connectivity between London and Stansted through enhancements to the rail network will generate wider economic benefits by encouraging more tourists to use Stansted as their port of entry. Importantly, there is also clear potential for rail enhancements to benefit local residents in terms of reduced commuting times, and stimulating increased economic activity within the region.

Oxford Economics also recognise<sup>37</sup> that the combination of good rail connectivity and a well-connected airport would improve the economic attractiveness of the region as a place to live, work and do business. We are committed to ensuring that Stansted is effectively marketed to passengers and airlines, so that the airport's potential is maximised. We work in partnership with the local Chambers of Commerce network and the SME community to foster long term economic growth in the region. In turn, this will generate wider benefits for the local and regional economies.

<sup>36</sup> Economic Impact of Stansted Scenarios (2013), Oxford Economics, paragraph 5.2.

<sup>37</sup> Economic Impact of Stansted Scenarios (2013), Oxford Economics, paragraph 5.7.2.

## SUSTAINABLE DEVELOPMENT PLAN ECONOMY



### IMPORTANCE OF CONNECTIVITY TO THE WIDER REGION

Enhanced connectivity to Stansted will be a key factor in driving economic regeneration in some local areas around the airport. Employment opportunities at the airport are important for regeneration areas such as those south of the airport (Harlow, Upper Lea Valley) and along the A120 Corridor eastwards (Tendring and Braintree).



In conjunction with our Surface Access Plan objectives, we will aim to improve access to the airport so that jobs can be accessed by those residents. This will have a combined benefit of a larger labour pool for job vacancies arising at the airport, but importantly provide strong impetus for economic regeneration.

As summarised above in Strategic Recognition of the Airport's Role, there is emerging policy support for infrastructure investment from many independent bodies such as the LEPs and Essex County Council. Those bodies' respective Growth Plans and the EPfE recognise that the connectivity to the airport from and to the LSCC and the Haven Gateway areas is a key issue.

Their collective promotion of investment in several major infrastructure projects has resulted in the confirmation from Government of Growth Deal Funding of £442.2million. This will focus on transport schemes that will bring jobs and homes until 2021<sup>38</sup> and commitments to joint planning and delivery of accessibility schemes for the LSCC as well as the long term route planning for railways<sup>39</sup>.

Our experience shows that working closely with partners is crucial to ensure the delivery of mutually beneficial infrastructure. The importance of partnership working has been reinforced by the creation of LEPs, and there is now an overriding emphasis from Central Government that local government and businesses should work in partnership to create delivery and funding mechanisms to enable infrastructure projects to be delivered. We will draw on M.A.G's wider experience – particularly from Manchester and Bournemouth – to drive and assist these processes.

<sup>38</sup> [www.southeastlep.com/about-us/activities/our-growth-deal-and-strategic-economic-plan](http://www.southeastlep.com/about-us/activities/our-growth-deal-and-strategic-economic-plan).

<sup>39</sup> Cabinet Office and Deputy Prime Minister's Office – Policy Paper: South East: Growth Deal 2014 (July 2014).



### 2017 AIMS

- We commit to working in partnership with local authorities and LEPs, as well as regional bodies such as the London-Stansted-Cambridge Consortium and Haven Gateway Partnership, to attract funding for infrastructure to drive growth and job creation into the East of England;
- We will continue to work in partnership with the business community to attract inward investment to the region. As part of this, we will focus on attracting long haul and full service airlines to Stansted to provide direct services to Europe, the Middle East and USA, as well as connectivity to other long haul destinations via international hubs. We will also aim for a continuing expansion of our direct short haul network to key tourist and business destinations;
- We commit to an on-going programme of works to improving our facilities for both passenger and cargo traffic so as to maximise the airport's potential and therefore its direct contribution to the growth of the local economy;
- We will continue to enhance the Stansted Airport Employment and Skills Academy to help provide training and jobs for local people, with particular focus on attracting employees from disadvantaged areas in Harlow and Braintree and generally in Essex and North East London. By 2017 our aim is get 550 local people into work per year;

### 2017 AIMS

- As part of the commitment in our Community Plan, to inspire a generation of young people, we propose to establish an on-site education centre, the 'Aerozone', which would provide a flexible and inspirational learning environment, primarily aimed at children and young adults; and
- Our Surface Access Strategy will continue to target connections to key areas for our current and future workforce.

# OUR SURFACE ACCESS

## KEY PRINCIPLES

Stansted is a leading UK airport for public transport use and leads the field in developing sustainable employee travel. The skill, imagination and innovative approach applied to developing public transport accessibility have been recognised by a series of awards at international, european and national level.

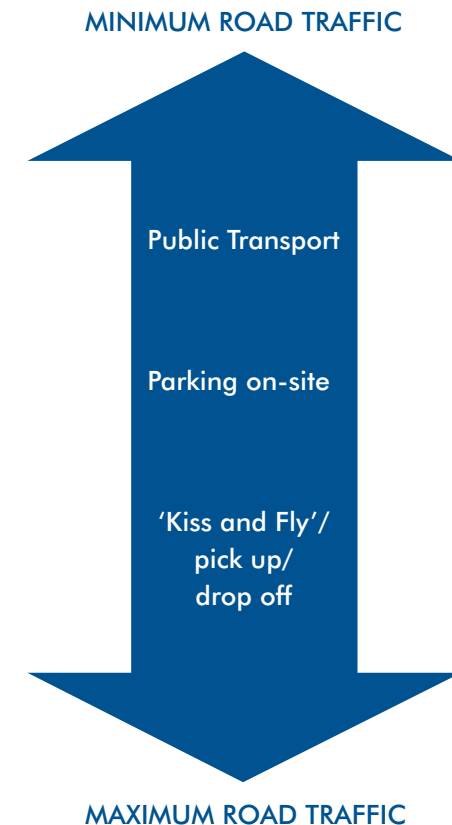


We are committed to delivering high quality and reliable transport infrastructure with sustainable travel choices for both passengers and employees. Enhanced surface access is a key element in our plans to attract more airlines and passengers to Stansted and to bring economic benefits to the area. It is also central to giving companies based at the airport access to the widest possible pool of labour and to ensure that local residents have access to jobs.

This Surface Access Plan seeks to build on our success in developing public transport to Stansted through joint working with our local authority and private sector partners. It also sets out how we will continue to manage the growth in airport-related road traffic in a responsible and sustainable way. We recognise the impact that airport traffic can have on the strategic road network around Stansted, particularly the M11 and A120, and we are committed to managing emissions from airport-related road traffic because of its contribution to local air quality. In this respect we are working jointly with our partners through the Stansted Area Transport Forum to support the delivery of national and local policies that seek to encourage travel by the most sustainable mode.

## SUSTAINABLE DEVELOPMENT PLAN SURFACE ACCESS

M.A.G is committed to sustainable transport at all its airports and we have developed a hierarchy of preferred means of access as shown in the diagram below:





## OUR PARTNERSHIP

### THE STANSTED AREA TRANSPORT FORUM

The Stansted Area Transport Forum (SATF) has been recognised nationally and internationally for the successful way in which it has delivered new transport initiatives, forged strong partnerships and changed the way that people travel.



It was set up in 1999 to establish a partnership approach to improving surface access to and from the airport. By looking at transport issues in an area-wide context, the airport has developed an integrated approach to transport initiatives that has yielded many benefits. The Forum is one of the UK's largest private/public partnerships.

It brings together commitment and expertise from local authorities, Government, transport operators, airport companies, Stansted Airport Consultative Committee (STACC) and other local businesses and interested parties. Over seventy organisations are now represented on the Forum. Government guidance sets three key objectives for Airport Transport Forums:

- identifying short- and long-term targets for increasing the proportion of journeys made to airports by public transport;
- devising a strategy for meeting these targets; and
- overseeing implementation of the strategy.



### THE STANSTED AREA TRANSPORT FORUM



The Forum is driven by a Steering Group which meets quarterly. It includes representatives from STACC, local authorities, Network Rail, Transport for London (TfL) and Highways England. The Steering Group acts as an executive board for the Transport Forum, setting objectives for the Working Groups and monitoring progress. The Steering Group and the Working Groups of the Forum have contributed to, and helped shape, this updated strategy and we will work together on its delivery.

The need for partnership working and collaboration is highlighted by the fact that the airport typically has relatively little direct control over the surface access infrastructure and services used by passengers and staff. Instead, our service partners are generally responsible for the maintenance and development of the airport's transport links, as shown in the table to the right.

Mode of Transport	Key partners
Strategic roads (eg M11)	Highways England <sup>40</sup>
Local roads (inc. A120)	Essex and Hertfordshire County Councils
Rail infrastructure	Network Rail and TfL
Rail services	Train operating companies (Greater Anglia, Cross Country) and Department for Transport – award of franchises
Coach services (long distance)	National Express, Terravision, EasyBus and TfL
Bus services (local)	Hertfordshire County Council, Arriva (TGM), First, Stephenson's of Essex, University Bus and Acme Travel
Green staff travel	Stansted Airport; on-site businesses
Taxis	24x7 (Stansted's authorised on-site provider and other private hire companies (pre book only))
Car Rental	Sixt, Avis, Budget, National, Enterprise and Hertz

# OUR PARTNERSHIP

## THE STANSTED AREA TRANSPORT FORUM



Our regional partners have identified a series of transport investment priorities, designed to support and stimulate economic and housing growth and improve access to Stansted. These are set out below:

- Improved capacity at the M11 Junction 8;
- Deliver in a timely and effective manner the M11 Junction 7a;
- M11 improvements between J8 and J9:
  - Short term – daytime HGV no overtaking ban
  - Longer term – improve access from the Cambridge area
- Deliver A14 major improvement scheme;
- Improvements to the A120 including:
  - access from the east and capacity improvements (Braintree to Colchester (A12))
  - Little Hadham Bypass
- Secure major improvements and ultimately 4-tracking the West Anglia Main Line (WAML) to Broxbourne, improving rail connectivity to London especially Stratford; and
- Protect the alignment of a second rail tunnel under the runway.



### POLICY

- We are committed to improving Stansted's connectivity and through our partnership working, support the delivery of the region's transport priorities.



### MODAL SHARE



#### PASSENGER MODAL SHARE

In collaboration with the SATF, we have been highly successful in expanding rail, coach and bus services over the last decade. Stansted is among the best performing airports in the UK and Europe for the percentage of trips by public transport. The latest full year CAA survey (2013) confirms the continuing increase in the use of public transport by air passengers, with 51% using bus, coach and rail services (around 8.7m passengers).

Air Passengers	2012		2013		2014*	
	Mode:	%	Actual	%	Actual	%
Bus/Coach		26.5	4,417,515	29.5	4,994,763	26.1
Rail		24.1	4,014,358	22.0	3,751,578	24.0
Kiss and Fly		31.5	5,236,192	32.6	5,505,745	31.0
Private Car (Airport parking)		14.2	2,367,778	12.6	2,144,404	15.1
Rental Car		2.8	460,558	2.4	409,369	2.1
No response		0.5	90,480	0.6	100,049	1.4
Other		0.3	57,625	0.3	54,018	0.3
Total Public transport		50.7	8,431,872	51.5	8,746,341	50.0

Source: CAA survey 2012, 2013 and 2014 [\*Data for first three quarters] (all data based on 'final mode' and excludes transfer passengers)

#### EMPLOYEE MODAL SHARE

A similar strong performance can be seen in the way that airport employees travel to work. Public transport use has increased from 7% to 23% in the last 10 years (up 3% in the last two years). Our latest survey (2013) shows the following:

- 10,200 employees on site in 190 companies;
- 54.3% of all employees live in Essex;
- 22.4% of all employees live in Bishop's Stortford;
- 54.6% of airport employees work in the terminal area; and
- 34.3% of employees working in the terminal use public transport.

Mode:	2002/3	2005	2007	2009	2011	2013
Car Driver	87.6%	78.6%	73.1%	71.7%	69.9%	68.8%
Car Passenger	4.1%	5.5%	6.3%	6.4%	7.1%	5.7%
Public Transport	7.0%	12.6%	16.4%	18.3%	19.8%	22.8%
Other	1.3%	3.2%	4.2%	3.6%	3.2%	2.7%



### REVIEW AGAINST TARGETS 2010-2015

For many years, Stansted has set itself an objective to increase the share of passengers and employees using public transport. Previous Surface Access Strategies have set a series of targets, and identified the measures to be taken to achieve them.



This approach has been formalised in the planning permissions that have been granted for development at Stansted. The two most significant are the permissions granted in 2003 (permitting growth to 25mppa) and in 2008 (permitting growth to 35mppa). Associated legal agreements (under S.106 of the Planning Act) contain various obligations governing our approach to surface access. Compliance is ensured through regular monitoring by the relevant planning and highway authorities.

Our previous Surface Access Plan in 2011 set the following specific targets for the period to 2015:

- to achieve and sustain a 43% use by air passengers of public transport by the time the airport reaches 35mppa; and
- to achieve and sustain a target of not more than 70% of all employees who drive to work alone by the time the airport reaches 35mppa.

The data for 2013 shows that we have outperformed the targets set in 2010.

As passenger numbers increase, we will work to ensure there is a commensurate increase in public transport use to maintain this level of performance. To achieve this, we will focus on addressing a number of key issues:

- the increasing levels of congestion on the strategic road network around the airport which have the potential to impact on the journey time and reliability of coach services, especially to London;
- the level of service – in terms of journey time and reliability – provided by train services on the WAML which have the potential to limit the ability of rail to meet the needs of passengers and staff; and
- the need to encourage more passengers from our local catchment area to use public transport, where at the current time coach and rail services either do not exist or are limited in scope and frequency.

### NEW TARGETS 2015-2019

A key component of our Plan is to set new challenges for surface access.



In order to ensure public transport use increases along with the airport's growth, we have set the following mode share targets for passenger and staff travel for the next 5 years.

2019

#### TARGETS

- Maintain at least 50% mode share to public transport and the sufficient capacity to facilitate growth to the end of 2019;
- Grow rail mode share from 22% to 25% by the end of 2019 and secure an enhanced timetable of services
- Reduce single car occupancy for staff travel to no more than 65% by end of 2019; and
- Reduce 'Kiss and Fly' to below 30% by 2019.

We believe these are challenging targets which will require concerted action by all the partners involved; by 2019, the airport could see around 12 million passengers utilising public transport. The measures that need to be taken to achieve our targets are covered in more detail in the following sections of this Plan, looking at each mode of travel.

#### REVIEW TIMESCALES

We will review this Plan no later than at the expiry of its targets; which covers the years 2015-19. We believe that the measures within this Plan will enable these targets to be met. In the event of any unforeseen circumstances that may cause a decrease in public transport mode share, a need for an earlier review would be discussed with the SATF.

### ROAD

Over six million airport users travel by car and for some it is their only practical means of getting to and from the airport. Our bus and coach operations also rely on an efficient, resilient and safe road network.



There are three main access points to the airport: A120 from the east, M11 Junction 8/A120 from the west, and M11 Junction 8a. These are the responsibility of Highways England. Thremhall Avenue provides a direct fast link from the M11 / A120 to the terminal complex and on site car parks. There are two local road access points at Coopers End (in the terminal area) and Bury Lodge Lane (serving long stay car parks and the northern sector). These are the responsibility of Essex County Council, whereas we manage some 23 miles of on-site roads. The Highways Working Group of the Surface Access Forum provides a means for all of the traffic authorities, including Highways England within the Stansted area to come together and exchange information.

### MANAGEMENT OF OUR ROADS

A number of improvements have been made to the road network serving Stansted. These include M11 capacity improvements, M11 J8-9 communications upgrade, M25 widening and A14 capacity improvements. The plans for local roads are set out in the current Essex and Hertfordshire Local Transport Plans. Previous planning permissions have required the airport to fund a number of road improvements.

Improvement	Status
M11 J8 Circulatory improvements M11 J8A Slip roads Installation of traffic monitoring sites on the airport road system	Substantially complete – funded by Stansted Airport
A120 – Bassingbourn roundabout – Priory Wood roundabout weaving section	Awaiting programme from Highways England
A120 Little Hadham by pass. Financial contribution from Stansted Airport of £250,000	In Herts County Council investment programme for completion by 2019

Our focus will be to manage the demand for road traffic, taking into account any planned improvements.

### ROAD



#### OFF-AIRPORT ROAD NETWORK

The most important strategic route to Stansted is the M11. To the south, this provides access to London and a direct link to the M25, and to the north it provides easy access to Cambridge and then to the A10, A14 and A1. These routes are becoming increasingly congested with limited resilience, particularly along key sections of the motorway to the north of the airport. This has led to increasing instances of delay and disruption. From an airport perspective, this has an adverse impact on passenger and employee journeys and it also has the potential to limit our ability to attract passengers from areas further away from the airport.

However, increasing the number of destinations from Stansted will reduce the need for local residents to use the M11 and M25 to access Heathrow and Gatwick for their flights. Flying from a local airport results in shorter and quicker journeys, lower emissions, and can help relieve pressure on the strategic road network.

As noted in an earlier section of this plan, there is increasing recognition and support for economic growth along the M11 London – Cambridge corridor. This potential, with the airport at a key location within the corridor, will only be fully realised if there is appropriate investment in the strategic road network.

Airport traffic relies on Junction 8 of the M11, which also links to the east – west A120 and serves Bishops Stortford, other local communities and a service area. There have been a number of improvements over the years, and it is now a complex, signal controlled junction. The junction is under stress, but there is some limited scope to make further changes to accommodate traffic growth.

Junction 8 was previously considered adequate to support airport development through to a throughput of 35mppa. A number of major new housing and employment sites are now planned in the wider area, many of which are likely to create additional demand at this junction and on other strategic routes. As such, we believe a strategic assessment is needed by the relevant agencies to assess the impact on this junction of this growth, the airport's growth and the area's long term access needs. Essex County Council has commenced such a study and we are providing input and support to the process.

Furthermore, we will work with the relevant highway bodies to identify the most beneficial improvements and, if appropriate, work together to promote alternative highway improvements in lieu of existing commitments.



## ROAD



### ROAD TRAFFIC FLOWS

We regularly monitor the impact of the airport on the local and strategic road network in conjunction with the Highways Working Group. A comprehensive area-wide traffic survey was undertaken in September 2004, backed up by permanent traffic counters and ANPR cameras.

A comparison was made with the 1999 survey. On Bury Lodge Lane, peak-hour traffic flow had remained stable since 1999. However, 60% of the traffic on this road was not airport-related but traffic using airport roads as a short cut. On Parsonage Lane at the Coopers End entrance, peak-hour traffic flow entering the airport had reduced substantially by 2004. Again, about 60% of trips were not airport-related.

We have assessed the likely growth in road traffic of Stansted operating at the capacity of the single runway. In the worst case, of no further improvement in public transport mode share (51%), we estimate that there would be 35,200 car trips on a typical August day. This compares to 31,500 car trips if Stansted remained capped at 35 million passengers. We will work with and alongside stakeholders in developing studies to analyse and understand traffic flows in and around the airport as our operations increase. This is particularly important as the background traffic, from housing and economic development growth, is very likely to increase in the future.

Schemes for highway improvements will be required as a result of all developments in the area. Currently, a number of improvements are planned for the local and strategic network. These will improve reliability and journey times and benefit passengers using Stansted. The schemes include:

- **A120 LITTLE HADHAM BY-PASS** – Herts County Council progressing; for opening in 2019 subject to approval;
- **A120 EAST** – Highways Agency Route Based Strategy<sup>41</sup> identifies a number of short and long term opportunities;
- **M11** – Overtaking ban for HGVs;
- **M11** – New J7a; and
- **A14 HUNTINGDON TO CAMBRIDGE** – Highways England progressing a major upgrade; planned to start in 2016.

<sup>41</sup>A12/A120 Route Based Strategy (March 2013), Highways Agency.

### ROAD



#### 'KISS AND FLY' TRIPS

Around 30% of passengers are dropped off by friends or relatives or use private hire taxis. These 'kiss and fly' trips are a significant proportion of our road traffic, as every return air trip generates four car trips. This is double the amount of car trips compared with parking on-site, and thus adds to congestion and increased CO<sub>2</sub> emissions. 'Kiss and fly' is an issue at airports across the UK. At Manchester Airport, for example, around 60% of passenger trips are in this category.

A number of measures have been introduced at Stansted to reduce this mode of travel. For example, a charge is now payable for drop off and pick up in the terminal zone; although a free set down/pick up service is provided in the Mid Stay car park using a shuttle bus to the terminal. New products (e.g. 'meet and greet' and valet parking) and competitive parking charges have also been used to encourage passengers to park rather than 'kiss and fly' or use private hire taxis.

The highest areas for 'kiss and fly' trips are:

- Cambridge;
- East Hertfordshire;
- Chelmsford;
- Colchester; and
- Basildon.

We will examine the scope to improve public transport links to these areas, while recognising the difficulties for passengers with early morning or late night travel times. Improved off peak rail services to Cambridge started in July 2014. We will continue to target 'kiss and fly' trips and seek to change behaviour to more sustainable forms of transport, such as public transport or park and fly.

#### ON-SITE ROAD NETWORK

We manage our internal road network in line with the Department for Transport (DfT) Design Manual for Roads and Bridges. A number of safety and other improvements have been carried out as part of our previous strategy. These include solar powered direction signs, automatic number plate recognition, security checkpoint on Thremhall Avenue and protection measures to the terminal forecourt and the terminal undercroft. To ensure resilience of the network, we work closely with other highway bodies, including special winter resilience arrangements.

#### MAKING BEST USE OF THE NETWORK

We will continue to make the best use of our existing infrastructure. This includes improved journey planning and 'real time' information for drivers using new technology. In 2014, dynamic signage was introduced on the airport road network to inform drivers of conditions in the Express Set Down area. We are also linked to the National Traffic Control Centre, and provide our transport operators and other companies with direct links to the Highways England database. This includes bus and coach, cargo, car hire and taxi operators, as well as airport hotels.

#### TAXI AND CAR HIRE

Most taxi use is via off-site private hire operators. These generate the same issues as 'kiss and fly' in terms of volumes of road traffic and emissions. There are a number of licensed concessionaires on-airport who operate taxi and car hire services. Stansted has quality contracts with these operators to ensure that customer service and vehicle quality is maintained.

# OUR POLICIES

## ROAD



2019

### AIMS

- To review and where deemed relevant implement the highway options for actively discouraging 'kiss and fly' traffic;
- We will make best use of our road network and work with others to identify the infrastructure needed to support increased demands for road access; and
- We will work with these parties to introduce capacity improvements as necessary, and in line with previous obligations agreed.



### TARGETS

- To deliver the highway-related planning obligations related to the permitted growth of the airport.

## SUSTAINABLE DEVELOPMENT PLAN SURFACE ACCESS



### BUS AND COACH

Nearly 30% of passengers use bus and coach services, making them the most popular form of public transport. In 2013, 5 million passengers used bus and coach services to and from the airport.



This reflects the extensive network of competitive services which has developed at Stansted, in response to the high demand for travel to London, and the high proportion of overseas visitors, who rely on public transport. Bus and coach services are flexible, adaptable and good value.

#### CURRENT PERFORMANCE

There are currently over 700 departures per day to over fifty towns and cities throughout the UK, including Birmingham, Nottingham and Oxford. At peak times there are 18 departures (2,500 seats) an hour to London – the main destinations being Victoria, Stratford, Old Street and Liverpool Street. A range of express services to key destinations has also been developed, providing a competitive alternative to the car and taxi.

The current London operators are EasyBus, National Express, and Terravision. These operators have invested in high-quality vehicles, customer service improvements and effective marketing which have led to a substantial increase in passenger usage from 7% in 2000, to 20% in 2007 and to nearly 30% in 2013. Currently there are over fifty charter or group travel coach movements per day, operated by a large number of bus and coach companies from across the UK.

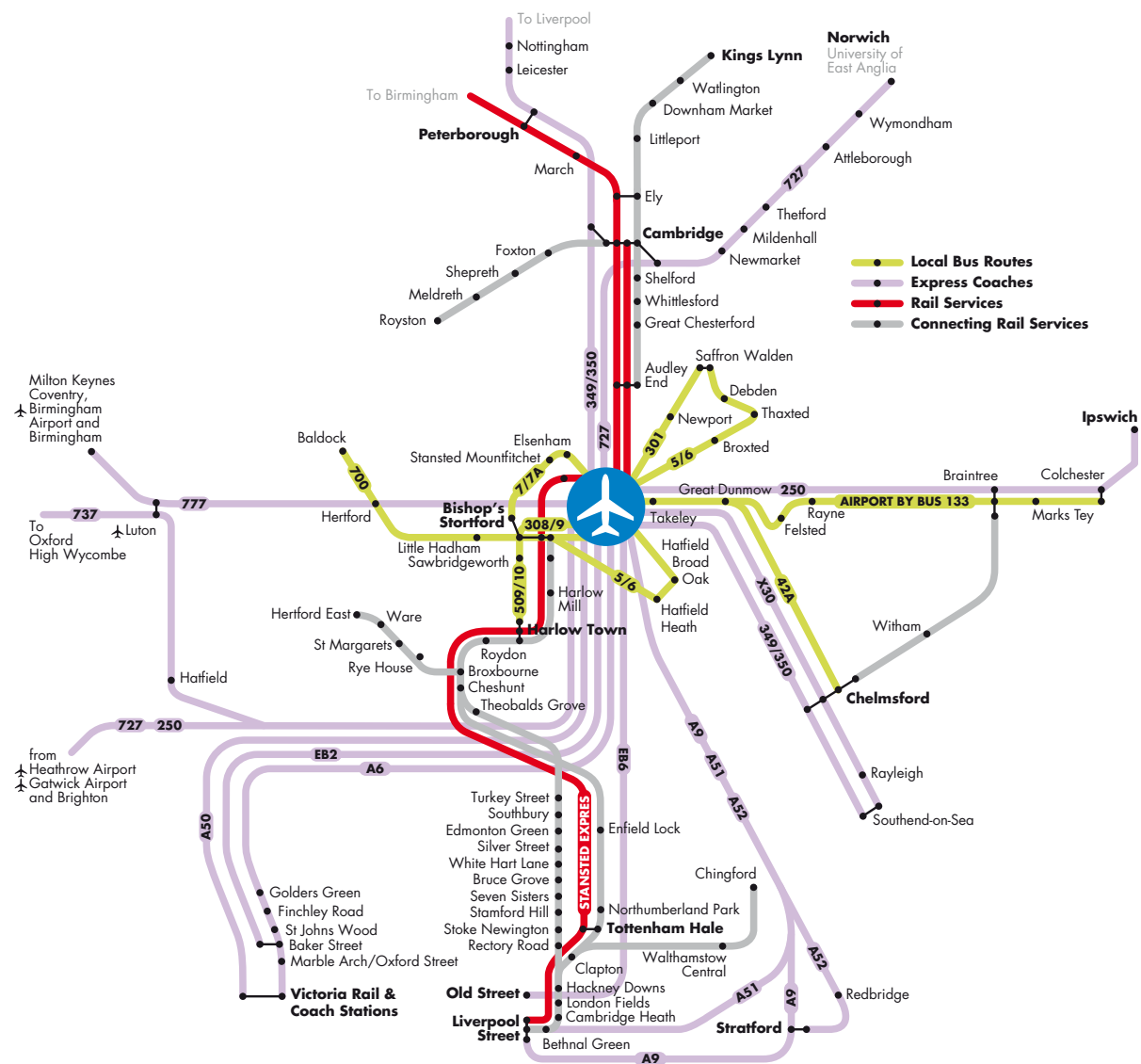
Local bus services can provide an effective alternative to the car for some passengers and employees. They are especially important for employee travel and also provide local bus connections for residents who enjoy enhanced frequency services. There are over 300 daily bus movements.

Five scheduled local bus operators provide nine services which connect to the main towns within the Eastern counties – Harlow, Bishop's Stortford, Great Dunmow, Braintree, Chelmsford, Colchester, Stevenage, Southend, Saffron Walden and Colchester. There is also one demand responsive service, the Stansted Flyer, which serves key towns in Essex and Kent.

The Arriva 510/9, 308/9 and 133 services and First X30 are the key connections for employees. Changes in vehicle quality, routes and timetables have increased both revenue and patronage. The 510/9 service was increased in 2013 to operate up to every 15 minutes, operating 365 days a year, 24 hours a day. The 308/9 service has been changed to improve reliability and reduce journey times.



## BUS NETWORK



### BUS AND COACH



#### BUS AND COACH OPERATIONS

We know that the choice of transport is as much about reliability, cost and service as it is about routes and networks. This requires a focus on the product and passenger experience.

Activities are centred on the bus and coach station, adjacent to the passenger terminal. This modern facility has significantly improved the passenger experience and incorporates the latest environmental technology. New waiting and ticketing facilities were introduced in 2007, and it now handles over 5 million passengers a year.

There are 39 bays for scheduled bus and coach services, hotel shuttle buses and charter coaches, plus a further 30 bays used as a layover area. An increasing number of charter coaches are now using Stansted. They drop off and pick up their passengers in the side bays of the bus and coach station. We will investigate ways of improving, or introducing, new infrastructure to improve the passenger experience for these customers. New driver facilities, offices for coach companies and a coach station management team have been introduced.

The significant growth in demand over recent years has increased the pressure on these facilities and additional capacity is going to be needed over the next five years. We will retain our bus and coach interchange in its prime location. Over time, as demand grows, it may be necessary to introduce remote parking for coach lay over and longer term waiting.

As is common across the UK, operators are charged for the use of the bus and coach station. This money contributes towards the capital and operating costs of the facilities. These charges are reviewed annually in consultation with operators.

The airport operates for 24 hours every day of the year. The main activity is from 04:00 to 01:00 hours. To meet demand requires extended operating hours for services, especially to meet the needs of early departures and late arrivals. The frequency of services is similarly important. This can pose a commercial challenge for operators. Our aim is that non-London express coach services should operate at least every two hours and local bus services should provide at least an hourly frequency. Services between London and the airport should offer a minimum of two services an hour.

### BUS AND COACH



The quality of the journey plays a big part in attracting passengers to switch from the private car. Some of our operators already operate the most modern vehicles, with air conditioning, leather seats and free Wi-Fi. We will encourage others to adopt these standards. Fares should be simple and clear for the passenger to understand. We encourage all operators to also accept payment in Euros.

Airlines and public transport operators have successfully worked together to integrate ticketing to enable air passengers to purchase their flight and coach ticket together. Public transport tickets are available at all stages of a passenger's journey – via the internet, telephone, on the aircraft or at the airport. This is one of the main factors behind the growth of coach patronage in the last five years.

A further improvement has been to offer the 'Visitor Oyster Card' for passengers travelling to London. Smart phone technology enables ticket purchases as well as journey planning and real time information. We see further potential as technology improves.

For employees, a number of fare initiatives have helped increase bus use. The Airport Travelcard offers an attractive incentive, with significant savings on standard fares. Over 1,400 Travelcards are sold each month, providing over £1 million of income per year to our bus, coach and rail operators. This assists the further development of services. A new carnet-style discounted ticket is attractive for employees who only use public transport occasionally. A book of prepaid, non-dated tickets can be exchanged for single journeys. It is currently available on the 308/9, 510/9 and 133 bus services.

In partnership with operators, marketing campaigns are regularly run to encourage passengers and employees to use public transport options to get to and from airport. These campaigns focus on new and improved services and also areas where we seek to build demand. Employee travel is promoted via regular communications across the site, and awareness raising campaigns.

### BUS AND COACH

#### AIRPORT TRAVELCARD ZONES

The Airport Travelcard gives unlimited travel in your price zone, plus any lower value zones, at any time.



New Travelcard Options

Monthly	3 Monthly	6 Monthly	Annual
£54.00	£150.00	£280.00	£540.00
£67.00	£190.00	£350.00	£670.00
£95.00	£270.00	£520.00	£950.00
£135.00	£390.00	£760.00	£1350.00

Prices at February 2015.



### BUS AND COACH



#### BUS AND COACH STRATEGY

This element of our Plan is overseen by the Bus and Coach Working Group of the Transport Forum. This brings together local authorities and the main operators. An updated strategy was launched in 2010 with the aim of substantially increasing bus and coach use.

It has three key elements:

- a. introduce new services where there is a business case;
- b. develop existing services; and
- c. increase patronage on all services to make the best use of available capacity and increase modal share.

##### **a. Introducing new services**

Over 40 new and enhanced services have been successfully introduced since 2001. From analysis of passenger data, and discussions with airlines and operators, key parts of our catchment area have been identified for new routes. These include:

- Peterborough;
- North Kent;
- Thurrock and Grays;
- Haverhill;
- Bury St Edmunds;
- Basildon;
- Epping Central Line shuttle; and
- Watford / Hemel Hempstead / Hatfield / St Albans / Welwyn Garden City.

We will work to ensure that the market is as competitive as possible, with as wide a range of services for passengers. We will continue to work with operators to develop services and serve more destinations. In some cases, where there is a carefully judged opportunity, a service may initially need some 'pump priming'. We will continue to enter into partnerships with operators and would expect any new service that is funded to be commercially viable within two to three years. This recognises that new services will take some time to establish themselves and develop mode share.

##### **b. Enhancements to existing services**

The existing network is continually evolving. We see scope to improve services as a result of growth with greater frequency to: Norwich, Oxford, Birmingham, Colchester and Cambridge; and London (including services extended into West London).

We will work closely with TfL and the London Boroughs as this will need to take into account availability of capacity at key London interchanges such as London Victoria. More widely, congestion and delays on the strategic road network impact on the performance of our services and could act as a constraint on future growth. We will continue to work with local authorities and TfL to address key bottlenecks.

We will seek to introduce more demand responsive services in areas with lower demand, or further away, when conventional scheduled services would not be financially viable. These services operate like a shared taxi and require pre-booking.

### BUS AND COACH



#### c. Increased patronage and modal share

We have identified a number of areas where we will seek to increase the patronage on existing public transport services. These include locations with a significant number of 'kiss and fly' journeys e.g. Cambridge, Chelmsford, Colchester, Southend, Ipswich, Harlow, Bishop's Stortford and Braintree.

We will continue to build patronage on bus and coach through:

- newer, high quality vehicles;
- use of SMART technology for journey planning; real time information, ticket sales and marketing; and
- innovative and imaginative marketing campaigns with operators and airlines.

2019

#### AIMS

- To work with bus and coach operators to identify opportunities for new and improved regional and local bus and coach services and provide financial support where justified;
- To improve the environmental performance of bus and coach services (including charter services) operating to and from the airport through the introduction of Euro 5 standard vehicles or alternatively fuelled vehicles;
- To encourage improvements in environmental performance through differential charging and Euro 6 vehicle introduction;

2019

#### AIMS

- To introduce a real-time information system for local buses to the Bus and Coach Station;
- To investigate the feasibility for passenger shelter and improved waiting facilities for the charter bus and coach bays; and
- Liaise with TfL and London boroughs to improve the passenger experience travelling by coach to and from London.



#### TARGETS

- To review and update the Bus and Coach Strategy in 2017;
- To work with operators to achieve a quality score in the Bus and Coach Station of 4 with a stretch target of 4.25 by 2015 (scale 1-5, where 5 is highest); and
- Develop and implement an airport customer service training package for coach operators during 2015.

### RAIL

Rail is the second most popular form of public transport for access to the airport, used by almost a quarter of passengers in 2013. Passengers benefit from frequent services to London and Cambridge on the West Anglia Main Line (WAML).



#### CURRENT OPERATION

Rail services connect the airport directly to London, Birmingham and transport interchanges at Cambridge and Peterborough. There are currently around 180 trains per day, with a maximum of five trains per hour in each direction.

The airport is served by a spur off the main line, which passes beneath the runway in a single bore tunnel. The rail station is directly linked to the passenger terminal by ramps, lifts and escalators. It offers catering, ticketing and waiting facilities. There are three platforms. Platforms 1 and 3 can accommodate trains of up to 12 x 20m-carriage length. Platform 2 handles four carriage Cross Country trains.

Abellio Greater Anglia (AGA) manages the station on behalf of Network Rail. Ticketing facilities are available on the station concourse, in the terminal, on the Stansted Express trains and at key stations. A number of improvements have been made which include new information displays, ticket machines and improved waiting facilities on Platform 2. Safety barriers now prevent baggage trolleys and pushchairs from being taken onto the escalators.

AGA was awarded the Stansted Express rail franchise in 2012. The original two-year contract has recently been extended to October 2016. A new long term franchise will be awarded from November

2016 and the airport will work closely with the DfT and potential bidders throughout 2015 to influence the scope and direction of the new East Anglia rail franchise.

The service runs from London Liverpool Street to the airport, with intermediate stops at Bishop's Stortford, Harlow and Tottenham Hale. Four trains per hour operate on a 15-minute frequency, with 8-car trains. Journey times vary between 47 minutes and one hour. The core daily services run between 05:00 (depart London) and (00:30 depart Stansted). Earlier and later services operate on certain days but this leaves many passengers on early or late flights unable to use rail to access or depart from the airport.

The airport is served by one of the newest sets of rolling stock operating at a UK airport. New class 379 trains were introduced in March 2011 and have greatly enhanced the passenger experience. This includes Wi-Fi, enhanced luggage space and power sockets. Multi-lingual announcements are made en route to the airport to prepare passengers for airport security.

Cross Country Trains operates from Stansted to Cambridge, Peterborough (link to East Coast main line) and Birmingham. Its franchise runs to November 2019. Cross Country Trains offer first class seating, refurbished trains and improved ticketing and customer service.

In July 2014, AGA introduced a new Cambridge-Stansted shuttle service. This service operates hourly between 09:00 and 16:00, with an additional journey in the evening off peak. Coupled with the existing Cross Country service, this provides a 30 minute frequency to Cambridge. Passenger demand for the new service is strong and throughout 2015, we plan to work closely with AGA and the DfT to look at introducing additional peak and weekend services.

## RAIL



### STANSTED'S RAIL VISION

Rail access is crucial to Stansted's future if it is to realise its potential and fulfil its role within the UK airport system. Rail is key to:

- attracting new airlines and passengers;
- providing competition with other airports;
- ensuring the London market is properly served;
- delivering the economic benefits of growth; and
- making full use of Stansted's spare runway and terminal capacity.

The 2012 Rail Vision has been reviewed and updated to take account of changes in the market and our long term aspirations for the airport. Our strategy has four main elements:

- a. extended operating hours on London services;
- b. capacity, performance and journey time improvements on the WAML;
- c. improved links to Cambridge and beyond; and
- d. passenger service improvements.

#### a. Operating hours

Early morning services out of London do not start early enough for air passengers to catch the first morning wave of flights, nor do trains start at a consistent time every day. Together, these factors inhibit greater rail use and cause uncertainty for passengers. The main impediment to longer operating hours is Network Rail's overnight maintenance regime for the line, where access to the track is required for a minimum period.





### RAIL



In August 2014, AGA introduced a 03:40 service from London Liverpool Street on Friday and Saturday mornings only. The service has been very popular with passengers and we will continue to work in partnership with Network Rail and AGA to secure this as a permanent, daily service in future timetables.

While the latest rail services out of Stansted to London serve the last arriving flights, passenger numbers are much lower than for the early morning flight departures. In order to provide services for the greatest number of passengers, we may explore the option to trade-off late night services to enable additional earlier trains to operate in the early morning.

#### **b. WAML enhancements**

The WAML is a busy and complex rail corridor, particularly between Liverpool Street and Cheshunt. Long distance, express and stopping commuter trains all compete for track access and capacity on what is largely a two track railway. The numerous stations, level crossings and infrastructure result in congestion and frequent delays.

Journey times between London and Stansted are relatively long and although operational performance has improved recently, service punctuality is still below other key airport express services. By contrast, Heathrow enjoys a 15 minute journey time to London Paddington on a dedicated line and Gatwick is only 30 minutes from London Victoria and London Bridge. The latter route has seen a major investment as part of Network Rail's £5.5 billion Thameslink Programme while both airports will also benefit further from improved rail connectivity provided by the new Crossrail line when it opens in 2018.

Evidence shows that inadequate rail connectivity and lengthy journey times deter passengers from using the airport and affect both the airport's ability to attract new airlines and our competitive position in the London market.

Although the current services provide sufficient rail capacity for the airport to be able to make full use of the single runway, journey time and quality improvements will strengthen Stansted's competitive position by making it more attractive to passengers and airlines.

Improved rail connectivity on the WAML will also be critical in supporting economic growth along the London – Stansted – Cambridge corridor, and enabling economic and housing growth in east and north east London. In addition, commuters from stations on the WAML would benefit significantly from reduced journey times to London.

These views were shared by the Airports Commission in their Interim Report, December 2013 and by the business group London First, who, in October 2013, produced an investment strategy for the WAML. This document set out a series of phased improvements with the aim to reduce journey times to the airport to around 40 minutes and secure four tracking on the key sections of the line between Copper Mill junction and Broxbourne.

In November 2014, Network Rail published the Draft Anglia Route Study, which sets out a number of options for improving the rail network in the East of England over the next decades, including links to the airport. Although the draft document did not include options for four tracking on the WAML, it did include options for journey time reductions of around 3 minutes and line speed improvements to both the airport and Cambridge.

# OUR POLICIES

## RAIL



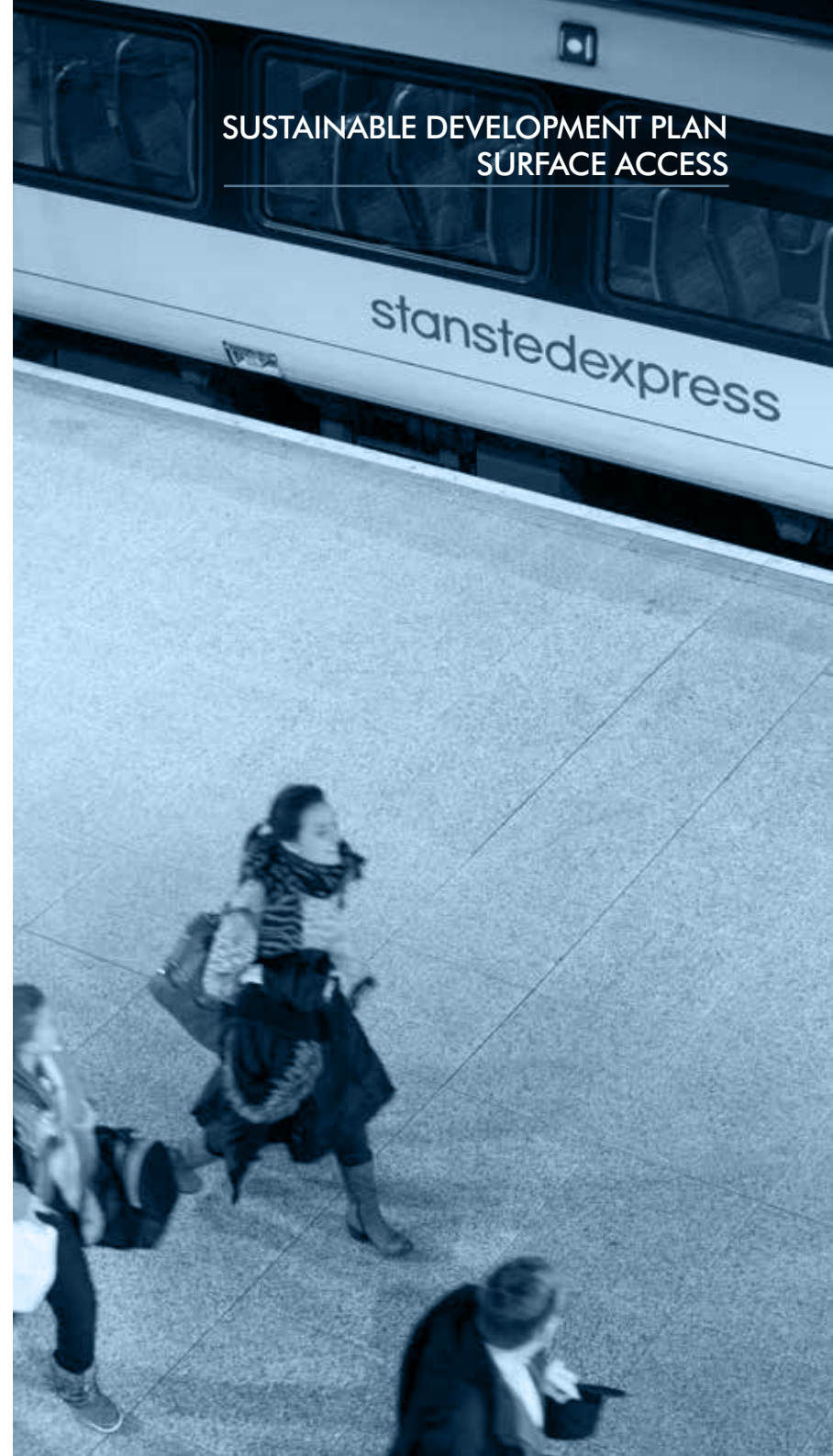
Over the course of Network Rail's Long Term Planning Process, we will continue to work closely with Network Rail, DfT and other partners to develop a more ambitious solution that will result in greater savings in journey times for all WAML users. Our aim would be to see the journey time to the airport reduced by 8 minutes to around 40 minutes and for this option to be taken forward through to the final study for delivery at the beginning of Network Rail's next control period in 2019.

In the intervening period, we will continue to work in partnership with business groups, Members of Parliament, transport providers and local authorities to build a robust business case for a phased, long term programme of infrastructure investment on the WAML. This programme should begin with the replacement of level crossings on the WAML and line speed improvements north of Tottenham Hale, leading to four tracking by 2025 and the full integration of Crossrail 2 services by the early 2030s.

At the airport itself, rail capacity is limited by the single track tunnel beneath the runway. At present, ten paths per hour are in operation. This will shortly increase to twelve paths per hour during certain periods with the introduction of a new off-peak service to Cambridge.

This infrastructure will be sufficient for Stansted's growth as it strives to make the full use of its single runway, as set out in this SDP. The key constraints to deliver this are away from the airport; capacity on the WAML and platform provision at London termini are both insufficient. Capacity at the airport station is sufficient following the lengthening of platforms in 2011-12. We will continue to protect the ability to lengthen platforms to accommodate longer trains and if required, in the future, a second rail tunnel.

## SUSTAINABLE DEVELOPMENT PLAN SURFACE ACCESS



### RAIL



#### c. Improved links to Cambridge and the north

In contrast to the 15 minute frequency to London, north bound services are much more limited. We welcome the new 30 minute frequency to Cambridge; a key growth area in our catchment.

Subject to the capacity constraints outlined above, we will support steps to introduce new services to towns and cities outside of London and improve services through to the Midlands and the East of England. This will help to broaden Stansted's catchment area, improve accessibility and help to support the development of new air routes, especially medium and long haul services.

#### d. Passenger service improvements

It is important that rail services continue to be competitive, offer good value and deliver high levels of customer service. We will continue to support and work closely with the train operators and other partners to offer new products and services and make the most of new technology.

Smart ticketing, such as Oyster Cards, better journey planning and real time information are areas where innovation can be expected. Integrated ticketing (linked to the airline ticket or holiday package) are other areas we will explore as part of our response to the East Anglia Rail Franchise consultation. Better waiting facilities, and catering for the needs of air passengers at key stations and on the trains themselves, can all help to attract new business.

#### CROSSRAIL 2

In our 2012 Rail Vision, the airport supported the need for a Crossrail 2 link to Stansted. We believe this would help to fully integrate rail and air transport modes at the airport while helping to utilise existing spare runway capacity at Stansted and attract new airlines to the airport. New airline customers, particularly of long haul, business or premium services need fast and direct rail connections to London.

An extension of Crossrail 2 to Stansted would provide vital new connectivity between the airport and Islington, Hackney, Tottenham and the Upper Lea Valley in North East London. It would help drive regeneration in these areas and bring employment opportunities at the airport closer to unemployment hotspots in North and East London.

A link would open up Stansted to new markets in South West London, Surrey and Hampshire, bringing direct connectivity to communities that are currently not within easy reach of the airport, while at the same time helping to relieve pressure on other congested airports in the South East.

### RAIL



#### PARTNERSHIPS

Our rail vision will only be achieved by continuing the strong partnership working we have established with key stakeholders.

Key partners include Government, the Mayor of London, Transport for London, Network Rail, train operating companies and the wide range of local authorities, businesses and Local Enterprise Partnerships.

We will remain an active member of the West Anglia Routes Group (WARG) which is a broad association of public and private sector organisations along the Upper Lea Valley corridor. We will continue to work with them and the London Stansted Cambridge Consortium to secure long and short term infrastructure and service improvements on the WAML.

The Rail Working Group of the Airport Transport Forum will continue to oversee and promote our vision and ambitions and co-ordinate our activity to secure improved connectivity and better rail access for airport users to support Stansted's growth.

2019

#### AIMS

- Secure Government commitment through the new West Anglia Task Force to deliver a significantly faster journey time from the airport to Central London, as the first phase in a long term programme of infrastructure investment on the WAML;
- Introduce earlier services every morning from Liverpool Street to Stansted to cater for increasing passenger demand during peak departure times (05:00 – 06:00). Ultimately introduce a 24 hour, 7 day a week rail service to Stansted;

2019

#### AIMS

- Work with train operators to improve the passenger experience;
- Introduce better rail connections to Cambridgeshire, and beyond including two trains per hour to the City of Cambridge;
- Support regional stakeholder aspirations to improve links from the WAML to Stratford, supporting regeneration in the Upper Lea Valley and opening up Stansted to new communities;
- Support the extension of Crossrail 2 to Stansted; and
- Improve the customer experience at the airport, Liverpool Street, Stratford, Tottenham Hale and Cambridge and provide improved on-train information for departing air passengers.



#### TARGETS

- Work with Network Rail and train operators on improving reliability with the aim of at least 93% of trains running on time by 2019 and 95% as a long term target with suitable long term investments on the network;
- Encourage the Greater Anglia franchise operator (Stansted Express) and Cross Country Trains to achieve a quality score of 4 with a stretch target of 4.25 by 2015 (scale 1-5, where 5 is highest); and
- Increase rail's mode share from 22% to 25 % by 2019.



### CYCLING

We aim to reduce car use by encouraging sustainable modes of transport. For airport staff living locally, and recreational use, we will improve cycle routes and facilities.



The previous Cycling and Walking Strategy (2008) led to improvements in routes from Braintree to the airport, including the Flitch Way. Essex County Council also obtained further developer funding for pedestrian and cycle crossings on the B1256. Hertfordshire County Council secured Community Infrastructure Levy Funding to provide cycle links between Harlow, Bishop's Stortford and the airport. This links to our on-site cycle network, with the Duck End Cycleway connecting Duck End Bridge across the M11 to Round Coppice Road. In turn, this links to the Long Border Road Cycleway. A new cycle/pedestrian route has been provided from Coopers End Roundabout to the Terminal via the short stay car park.

Eleven new cycle and motorcycle parking shelters have been introduced. These are located throughout the airport in locations such as the employee car parks and adjacent to the transport interchange.

Stansted joined the Government's Ride2Work scheme in 2007 and a large number of employees have been able to purchase new cycles at a discounted rate. We have secured a 15% discount on new cycles at Halfords stores for all airport employees.

### CYCLE STRATEGY

We will continue to seek improved, safe routes to key local settlements. Our priorities are:

- to the west and north to Bishop's Stortford, Birchanger, Stansted Mountfitchet and Elsenham;
- extend the Sawbridgeworth – Bishop's Stortford link; and
- Storage, shower and secure parking at key locations on site, including North Side.



### TARGET

- In 2013, c 0.1 % of employee trips were made by bike. Our target is to increase this to 0.5% by 2019.

### AIRPORT TRAVEL PLAN

Stansted has a successful track record of sustainable travel. It continues to be an example of best practice, with successive Travel Plans delivering behavioural change and a reduction in employee car use.



Effective partnerships have been forged with on-site businesses, the National Business Travel Plan Network (NBTN) and the Eastern Region Workwise Group. These help to share experience, best practice and raise awareness. For the last 4 years, Stansted has been recognised by Essex County Council's Gold Award for the Travel Plan and achievements in reducing employee car use.

#### AIRPORT COMMUTER CENTRE

This is our dedicated information service for airport employees and employers. It offers travel-to-work advice, and administers the Airport Travelcard and Car Share Schemes. Opened in 2007, it sells over 1,400 Airport Travelcards per month generating over £1 million of annual revenue for bus, coach and rail operators.

#### AIRPORT TRAVELCARD

The travelcard offers an attractive incentive for employees to use public transport, offering significant savings on standard rail, bus and coach fares. The price depends on an employee's home postcode. The fare zones in 2015 are £54, £67, £95 and £135 a month. The prices represent a combination of distance and mode, similar to the London Travel Card zoning system, and are reviewed annually to reflect inflation. Staff can also purchase 3, 6 or 12 month Travelcards at significant discounts.

Employees can save as much as £6,000 a year compared to driving to work every day by car. The Travelcard can be purchased 24 hours a day, 365 days a year, via the internet, phone or the Airport Commuter Centre. There has been sustained year-on-year growth of c.25% in Travelcard sales.

#### CARNET TICKET

A new carnet-style ticket was introduced in 2007. This book of prepaid non-dated tickets can be exchanged for single journeys. This is ideal for part-time employees that only use the bus once or twice a week. It is currently available on the 308/9, 510/9 and 133 bus services.

#### EMPLOYEE SHUTTLE SERVICES

The airport is a large and dispersed site, requiring effective connections between the main employment locations. A number of local bus services are routed via key employment areas and a free shuttle bus now operates between these areas and the North side, Monday to Friday, with a 30-minute frequency.

Our aim is to attract employees from areas of need and regeneration. More detail is set out in the Economy section of our Plan. We recognise that transport can be a barrier to accessing employment. We have been working closely with a number of agencies to align airport employment opportunities with affordable and reliable transport connections. The Stansted Night Run shuttle serves Tottenham Hale, Edmonton Green and Enfield and provides Airport Travelcard holders with a free service that arrives at the airport at 03:40 ready for a 04:00 shift time.

### AIRPORT TRAVEL PLAN



#### CAR SHARE SCHEME

The Airport Car Share Scheme, originally started in 2002, is a key element of our Travel Plan. The Scheme allows employees to be matched with those with similar work patterns and preferences. Members are provided with 150 designated car share bays located close to Enterprise House and have an emergency ride home facility if needed. Members also receive a variety of discounts. Regular reviews of membership are undertaken, as well as the reissuing of Airport Car Share passes. The scheme has continued to increase its membership with an average of 50 new members joining each month.

#### RECRUITMENT AND NEW EMPLOYEES

Travel planning is now an integral part of the induction process for new staff, so that sustainable travel becomes the preferred choice. Our marketing strategy aims to encourage employees to change their travel behaviour by focusing on the benefits to the individual. The programme reflects the diverse nature of the airport environment and utilises a range of techniques from large outdoor posters located close to car parks, internal advertising on notice boards, employee restaurants and rest areas, advertisements and articles in airport newspapers to leaflets, newsletters, websites and face-to-face visits.

Following the results of the 2013 employee travel survey, one of our key targets will be to continue to increase the awareness of the Airport Travelcard and Car Share Schemes.

#### JOURNEY PLANNING

An innovative approach that provides tailored travel information to employees is available from the Airport Commuter Centre. These plans pull together all specific travel information that an individual needs to make an informed choice based on times, frequencies, cost, and route.



#### TARGETS

- Review and update the Airport Travel Plan in 2015;
- Increase the number of companies signed up to the Airport Travel Plan to 90% by 2015;
- Undertake employee travel surveys in 2015, 2017 and 2019;
- Grow car sharing by 10% a year over the next 5 years; and
- Increase the awareness to over 90% of Airport Travelcard and Car Share Schemes over the next 5 years.

# OUR POLICIES

## ACCESSIBILITY

Our aim is to make the passenger terminal fully accessible to all users. In May 2008, we introduced a new service for passengers with reduced mobility (PRM) to assist them with their journey through the terminal.

### Express Set Down

SPACES

### Short Stay Parking

SPACES

### Mid Stay Parking

SPACES

New real-time signage including the new Express Set Down facility introduced in July 2014

We have worked very closely with surface access providers to ensure that passengers' journeys are fully connected and provide a great experience regardless of mobility difficulties.

Many transport authorities and companies are also improving accessibility, helping to provide clear and direct routes for passengers. We will work with them and encourage them to work with us through the Transport Forum to ensure passengers' journeys are connected and accessible.

Blue Badge spaces have been provided as part of the new Express Set Down area on the terminal forecourt as well as accessible drop off/pick up bays in the coach station for coaches who require to deploy their wheelchair lift. Help points are located throughout the car parks for passengers who require assistance.

## SUSTAINABLE DEVELOPMENT PLAN SURFACE ACCESS





### CAR PARKING

Despite the airport's very high public transport use, there is not always a viable or convenient alternative to the private car. Approximately half of our passengers still use the car. This includes passengers driving themselves, and parking, or being picked up and dropped off by others, or by taxi.



We need to provide adequate road access and an appropriate level of car parking within the airport boundary to meet future demand. We discourage on road parking for safety and security reasons.

#### CURRENT PROVISION

A range of high quality car parking products are provided to meet the different needs of users. As highlighted earlier, on-site parking generates half the road journeys of 'kiss and fly' or taxi trips. It can therefore help in managing road traffic and reducing congestion and carbon emissions.

There are currently just over 26,200 passenger car parking spaces on-site, all at surface level. The main facilities are:

- **SHORT STAY** – 2,300 spaces, in a surface car park adjacent to the terminal;
- **MID STAY** – 5,100 spaces at South Gate, adjacent to the A120; and
- **LONG STAY** – 18,800 'self park' and storage spaces, mainly in the north western sector off Bury Lodge Lane.

In July 2013, two new car park products were introduced. These were designed to compete on both convenience and price with 'kiss and fly' and taxis and also with unofficial off site car parks.

- **JET PARKS** – a competitively priced service. Passengers park in the long stay car parks and are ferried to the terminal by a regular free shuttle bus.
- **MEET & GREET** – enables drivers to park next to the terminal building; unload passengers and bags and depart. The vehicle is then moved to a remote storage area; but is moved back to the terminal pick up area ready for the passenger's return. This has proved exceptionally popular, matching the convenience of taxis and 'kiss and fly'.

Passengers use the different types of parking on the basis of convenience, price, length of stay and journey purpose.

The traditional forecourt access at airport terminals was restricted following a security incident at Glasgow Airport in 2007. However, in July 2014 we were able to reintroduce limited access with an Express Set Down facility on the Terminal forecourt that will improve service to passengers. A charge is made to utilise this area but a free set down area is provided at the Mid Stay car park. A free shuttle bus operates from this area to and from the Terminal.

### CAR PARKING



#### EMPLOYEE PARKING

There are a number of employee car parks across the site, related to the main employment centres. A total of 2,408 spaces are available for staff. A number of these are communal facilities, controlled by us. These are adjacent to Enterprise House (to serve the terminal complex), in the cargo area and at Coopers End Road.

As the terminal area becomes more intensively used, the long-term strategy may require the closure of some employee car parks and their relocation to the north side of the airport.

A charge is made to on site airport companies who request an employee space in our communal car parks. Some employers pass this cost on to their employees. Due to the success of the Airport Travel Plan, and incentives to use public transport, the growth in staff car parking has been at a lower rate than the growth in employee numbers.

#### PARKING STRATEGY

Sufficient parking, in convenient locations, will continue to be needed to meet passenger demand. As explained earlier, parking is an integral part of our overall transport strategy. In terms of road traffic, it sits between public transport and drop off (i.e. 'kiss and fly' and taxis) in our hierarchy of preferred modes of travel. In some cases, parking on site competes with public transport; offering choice and competition. In other cases, it is the only viable alternative to 'kiss and fly' and taxi. This is particularly true in the more rural parts of our catchment area, or for those communities without direct, or suitably timed, public transport services. We will continue to monitor passenger behaviour, demand and the volumes of road traffic to ensure we meet passenger needs.

The demand for the different types of parking varies by time of day and time of year. Also passenger demands are changing, as shown by the popularity of premium 'meet and greet' type services. Pricing is a key element in passenger choice. We will always ensure we have sufficient space on site to meet our peak demand. For long stay parking, this generally arises in the summer months and peak holiday times. For short stay, it fluctuates greatly, with daily peaks related to flight arrivals and departures as passengers get picked up and dropped off.

### CAR PARKING



**SHORT STAY** – This will continue to be provided close to the terminal building with easy pedestrian access. The current short stay car park is intensively used and reaching capacity. Our forecasts suggest an additional 4,000 spaces will be needed over the next 20 years. Surface level options around the Terminal are limited due to competing demands e.g. bus and coach parking. We will review the case for decked or multi storey provision, as is common at most major UK airports. BAA gained planning permission for multi storey parking (with a height limit) at the south west and north eastern ends of the current short stay car parks. We will review these options, along with locations to the side of the terminal, adjacent to the Radisson Blu hotel and Enterprise House. Any parking structure will need to be carefully located and sensitively designed.

**MEDIUM STAY** – We expect the distinction between medium and long stay parking to blur over time, as new products emerge. The main distinction is now between ‘self-park’ and ‘valet parking’. We will retain the current surface car park adjacent to South Gate services, but see scope to increase the density of parking and make more efficient use of the land while still screening it in the landscape. We expect it to remain a surface car park.

**LONG STAY** – The extensive surface car parks on Bury Lodge Lane will remain. This area will provide a mix of ‘self-park’ long stay and storage areas for ‘meet and greet’ cars. We again see scope to improve the efficiency and layout of this area and increase the intensity of use. There is additional land to the north which will be

our preferred option for the expansion of long stay capacity. We will also explore options for ‘meet and greet storage’ in other parts of the site, closer to the terminal so reducing the distance and volume of transfer trips. In the medium term (post 2020) we may have to consider one or two level decking of long stay car parks in order to handle the growth in demand and contain it within the current site. But this remains a more expensive solution, which risks on site car parking losing its competitive position against ‘kiss and fly’ and taxis.

Overall, we expect the current parking provision of just over 26,200 passenger spaces to increase to between 45,000 and 55,000 spaces. This range is likely to satisfy growth to both 35mppa and beyond to 40-45mppa. These will all be contained within the current site.

**EMPLOYEE PARKING** – We will continue with a mix of sites. Large, communal provision is most efficient and best suited to the terminal area, where there are the largest numbers of staff. As pressure on space increases around the terminal complex, we may need to consider more remote staff parking areas (served by a bus shuttle) or decking parts of the existing staff car park. Elsewhere, space will continue to be provided within individual employment sites e.g. in the maintenance area and North Side. In the long term, we expect the scale of staff parking to increase from the current 2,408 spaces to around 5,000 spaces at 40mppa.

### CAR PARKING



#### OFF-AIRPORT PARKING

As is common at most UK airports, there are a number of competitors that offer air passenger parking off-site. Examples are hotels and approved off-site car parks. However, there are a significant number of unauthorised off site operations. Some of these are 'self-park', with a shuttle transfer to the airport; more recently we have seen off-site storage by companies offering their own 'valet' type services. Some are in urban and residential areas, others in rural locations around Stansted. There is local community concern that these can cause harmful impacts in terms of amenity, noise, disturbance and vehicle trips on local roads. Estimates vary, and numbers fluctuate, but off-site parking could amount to between 1,500 and 2,500 spaces.

As part of our planning obligations we regularly monitor this activity, in conjunction with local authorities. They are then responsible for investigation and enforcement against unauthorised uses. We offer a telephone 'hotline' service for local residents to report concerns.

Results of the monitoring are regularly reported to the Highways Working Group. The most common areas are generally concentrated in the Bishop's Stortford and Stansted Mountfitchet areas. Essex County Council has introduced measures to prevent fly parking in Takeley. Initial results show that this has been very effective and the scheme was extended in 2010 to deal with verge side parking along Parsonage Road. Hertfordshire County Council has introduced a junction protection scheme in Bishop's Stortford. We will continue to commit up to £20,000 per annum to tackle the issues of off-airport car parking and fly parking in local communities. These form part of our obligations associated with the 35mppa planning approval. Furthermore, we will work with local authorities to ensure that their relevant local planning policies can be implemented.

### FUNDING TRANSPORT IMPROVEMENTS

To support our Airport Surface Access Strategy, we have created a transport fund. This provides the means to fund local transport development and increase public transport use by passengers and employees.



The Passenger Transport Levy was set up in July 1999 and provides £500,000-£700,000 per annum. This is funded from an average of 21p per public car parking transaction plus £10 per employee parking pass issued.

The use of the Transport Fund is overseen by our Surface Access Forum. It is used for a wide range of activities, including the work of the Transport Forum, supporting out of hours local bus services and employee shuttles, the Airport Commuter Centre, the Airport Travelcard and Car Share Scheme, new cycle and motorcycle shelters, as well as onward travel information and marketing.

In addition, we are committed to funding various specific transport infrastructure schemes. These form part of our two main planning permissions – growth to 25 mppa (granted in 2003) and growth to 35 mppa (in 2008). The main schemes have been referred to in the specific sections on road and public transport above. Our compliance against these obligations is monitored by the relevant planning and highway authorities.



#### TARGET

- To continue to monitor off-airport parking within a 5-mile radius of the airport in conjunction with local planning authorities and maintain a 'hot line' reporting system for unauthorised airport parking.









## HOW TO CONTACT US

The Sustainable Development Plan is an important document for us as it sets out what our aspirations are for development to the full capacity of the single runway at Stansted. There are many stakeholders who have an interest in the airport and the views and comments from Government, local authorities, neighbours, the business community and customers are an important part of the planning process.

We are committed to being open in sharing our vision for Stansted and the local area. Our plan reflects local views and ideas that were expressed during consultation on the draft version. We will continue to engage; to report our performance and review our plans in the light of changing circumstances. We expect to review and update this SDP at least every five years in line with current Government advice on airport master plans.

To obtain copies of the Sustainable Development Plan or contact us about its content:

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