

DRAFT

# 2014 | SUSTAINABLE DEVELOPMENT PLAN SUMMARY



### FOREWORD by Andrew Harrison – Managing Director

Stansted is a great airport, with strong traditions and a really bright future. Our airport sits at the heart of the London-Stansted-Cambridge corridor, one of the most exciting economic regions in the world – generating over £160 billion for the UK economy. We will also have an important part to play in supporting London's continued growth to the east, providing airport capacity and employment opportunities to help drive this development.



We have ambitious plans for Stansted, and following M.A.G's acquisition of the airport just over a year ago we have set our sights on making it the best airport in London. We've made good progress already, with traffic growing again for the first time in seven years. Over the years ahead, a reinvigorated Stansted will be one of the fastest growing airports in the UK, and with our existing runway we can more than double the number of passengers we are serving today.

The airport's potential for growth will be of enormous value to the UK as it strives to develop its international connectivity to support increased trade and investment. The Government appointed the Airports Commission in 2012 to advise it on how to maintain the UK's leading position in the global aviation market. The Commission's Interim Report, published in December 2013, recognised the importance of Stansted's role in providing new capacity to meet increased demand for air travel, particularly as London's other airports become ever more constrained.

The Commission's Final Report, due in 2015, will recommend to Government what steps should be taken to ensure that existing airport capacity makes the biggest possible contribution to meeting demand. To help the Commission address these issues in relation to Stansted, we have prepared this draft Sustainable Development

Plan (SDP), setting out how Stansted will grow to the capacity of its existing single runway, along with an assessment of the associated benefits and impacts.

This plan provides a framework for sustainable growth of the airport on its single runway. So it does not just concern itself with capacity and land use, it also sets out how we will support economic growth in the region; how we will improve our transport links and how we will manage the impacts of a growing airport and bring positive benefits to local communities.

The Airports Commission has identified Stansted as an important long term option for new runway capacity. This reflects the long term economic potential of Stansted's catchment, and the continuing increase in the desire to travel. At the appropriate time, the case for new runway capacity will need to be considered by all stakeholders, but these issues are not addressed as part of this document.

We are committed to working closely and openly with local people and our other stakeholders. This consultation is part of that on-going dialogue. This Sustainable Development Plan has been written for everybody with an interest in the airport, not just those with technical expertise in airport planning. We have also divided the different topics into four more detailed documents; making it more accessible and easier to see our approach. Our aim is to encourage comment and stimulate discussion on the key issues. I hope that you will read the documents with interest, and I would encourage you to share your views with us during the consultation to help us shape our ideas and prepare the final version of the plan.

**ANDREW HARRISON**

Managing Director, Stansted Airport



### INTRODUCTION

M.A.G acquired Stansted at the end of February 2013 with a clear vision for the future. Stansted is a superb, modern airport with room to grow and the best on-time performance of any major airport in the UK. We were confident that we could build on these strengths by improving customer service and attracting new airlines and passengers, and by doing so, make Stansted the best airport in London, measured in terms of customer service and value to airlines.



Our strategy for Stansted is based on four key principles:

- Building on positive airline relationships
- World class facilities and service
- Improving our competitive position
- Taking a long term view

We knew that we needed to move quickly to make Stansted strong and competitive and to start delivering benefits for airlines, passengers and the local community as quickly as possible. Since February 2013, we have made good progress in implementing our plan, including:

- reversal of the long-term decline in Stansted's traffic that started back in 2008;
- agreement of new long term growth deals with airlines;
- completion of the first phase of an £80 million plan to transform the terminal;
- creation of new partnerships locally and nationally to develop a shared vision for the airport and the region;
- buy-in from our service partners; and
- setting the agenda for delivering significant improvements to our rail services.

These are just the beginning of our plans. We are confident that our approach to operating and developing Stansted, based on delivering excellent customer service and value to airlines, will succeed in a market where airports across the UK and Europe are competing to attract new business. We will build on our experience and relationships to attract new airlines and develop profitable new routes, and we will work with long-haul carriers, full service carriers and our existing low cost airlines to secure growth.

Despite strong and growing demand for air travel from our region, the majority of passengers from our current catchment have had to travel to other airports for the services they need. Looking forward, we are aiming to attract a greater share of passengers from central London, from key marginal areas around London, and from our own local catchment area where there is significant scope to improve the range of services that Stansted offers.

### THE OPPORTUNITY FOR GROWTH AT STANSTED

From 2007, Stansted's throughput fell from 23.7 million passengers per annum (mppa) to 17.4mppa in 2012. This decline was driven by a number of factors including the recession, protracted uncertainty over the airport's ownership, disputes between BAA and major airlines and stronger competition from other airports. This has left Stansted with significant spare capacity and in a unique position among London airports. Thus it is well positioned to make a significant contribution to meeting growth in passenger demand in London and the South East over the next 15 years.

### INTRODUCTION



#### PLANNING FOR THE FUTURE

In September 2012, the Government established the Airports Commission, led by Sir Howard Davies, to make recommendations on the steps needed to maintain the UK's global hub status. The Commission published its Interim Report in December 2013, setting out amongst other things a series of recommendations on short and medium term measures to optimise the use of existing airport capacity. The Commission recognised the important contribution that Stansted was likely to play in meeting demand in the period before any new runway capacity could be delivered.

The Commission is due to publish its Final Report to Government in 2015. The Final Report is likely to contain further recommendations to Government on the steps that should be taken to ensure that existing airport capacity makes the biggest possible contribution to meeting demand. We are keen to ensure that the Commission's recommendations are informed by up-to-date assessments of the capacity of Stansted's single runway.

To assist the Commission, this draft Sustainable Development Plan (SDP) sets out how Stansted can grow to the capacity of its existing single runway, along with an assessment of the benefits and impacts of using that capacity.

Looking further ahead, we recognise the value that local communities and stakeholders attach to having a clear view of our long term plans. Over the long term, sustained growth

in economic activity in Stansted's catchment will generate a substantial increase in demand for air travel. Stansted represents a significant asset in this respect because its single runway has considerable spare capacity to accommodate additional demand. The Airports Commission has identified Stansted as an important long term option for additional runway capacity. At the appropriate time, Government policy will need to consider the case for the development of additional runway capacity.

This document is focused solely on the development of Stansted up to the capacity of its existing runway. It does not address issues relating to the development of additional runway capacity. It does provide a framework for Stansted's sustainable growth by identifying M.A.G's approach to community engagement and managing the airport's impacts. Our guiding principles in preparing the draft SDP have been to:

- support Stansted in becoming the best London airport;
- proactively plan for growth to make best use of existing capacity;
- support prosperity and 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.



### STANSTED AIRPORT

Stansted is London's third largest airport, handling over 18m ppa. The airport serves around 150 destinations across 30 countries, providing London and the East of England with international connectivity, predominantly to short haul European and North African destinations. Stansted is firmly positioned as a market leader for low-cost short haul travel.



We have been recognised globally as the World's Best Low-Cost Airport in the SKYTRAX World Airport Awards for the last four years.

The airport is a key international gateway for the UK and it is the busiest point of entry for non-UK residents arriving by air. More than two-thirds of passengers using Stansted are foreign nationals either on business, visiting friends and family or on holiday in the UK. Stansted is also located at the centre of a thriving economic corridor, positioned between London and Cambridge, amongst clusters of high growth industries and surrounded by growing population centres.

The airport has the highest volume of dedicated freighter traffic among the London airports: over 200,000 tonnes of cargo were transported through the airport in 2013 which helped connect the economy of London and the region with the global marketplace.

We have the ability to grow the use of our single runway through more efficient utilisation of runway slot capacity across the day and throughout the year. We have planning permission to grow to 35m ppa and 243,500 passenger air transport movements and 20,500 cargo air transport movements per annum.

In the next ten years, we forecast that the airport will be approaching its current planning cap of 35m ppa. This level of throughput can be accommodated with our existing infrastructure or new infrastructure for which we already have planning permission. Beyond that, we estimate that the airport could grow to handle in the region of 40-45m ppa within the current boundaries and physical constraints, as a result of improvements to the way in which we operate and use our facilities. The exact capacity will be a product of our route network, aircraft size, the spread of traffic through the day and year and the capacity drivers described in our Land Use Plan.

There is also potential for the cargo capacity at the airport to increase, potentially doubling the current throughput of cargo on dedicated aircraft to around 400,000 tonnes per annum.

This draft SDP sets out how we intend to develop Stansted so that it operates in the most efficient way to achieve its full single runway capability. We also set out the assumptions on Stansted's market potential and the air traffic forecasts we have used for the purposes of guiding the development of the SDP. These provide an appropriate reference point for assessing development requirements and the consequences of growth rather than a firm guide to the future rate of growth at Stansted. The draft SDP also sets out our analysis of the effects on local people, on the environment, and the need for new facilities associated with full use of the runway.



### ECONOMY AND SURFACE ACCESS

Stansted Airport is an important catalyst for growth and productivity in the East of England and North and East London. Our aim is to maximise our economic contribution, and maintain a fair and sustainable relationship with our supply chain and business partners.



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 can play a key role in supporting the growth and development of the regional economy, helping attract investment and sustain employment.

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 regional economy; and to Essex in particular where over half of the people working at the airport live. Stansted generates around £770 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.

We project that the growth of Stansted to 35mppa (the current planning cap) by 2025 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. Beyond that, further growth of the airport up to 45mppa by 2030<sup>1</sup> would be worth £4.6 billion to the UK economy and generate an extra 10,000 jobs.

We take a responsible and a 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.

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. The Stansted Airport Employment and Skills Academy opened in March 2008 and helps those looking for employment at the airport.

A well connected airport improves the economic attractiveness of the region as a place to live, work and do business. M.A.G is committed to ensuring that Stansted is effectively marketed to passengers and airlines, so that the airport's potential is maximised. We will work in partnership with the local Chambers of Commerce and the small-medium enterprise community to foster long term economic growth and inward investment in the region. In turn, this will generate wider benefits for the local and regional economies.

<sup>1</sup>45mppa used for assessment purposes. Single runway capacity lies between 40 and 45mppa.

### ECONOMY AND SURFACE ACCESS



Enhanced connectivity to Stansted will be a key factor in driving economic regeneration and productivity in some local areas around the airport. Employment opportunities at the airport are important for regeneration areas such as those south and east of the airport, particularly along the Upper Lea Valley.

We will work in partnership with local authorities and Local Enterprise Partnerships (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. Our partnership with the business community will help attract inward investment to the region. We will focus especially on attracting long haul and full service airlines to Stansted to provide direct services to the Middle East and USA, as well as connectivity to other long haul destinations.





### SURFACE ACCESS

Stansted Airport is a leading UK airport for public transport use and is a pioneer 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 building on this platform to deliver high quality and reliable transport infrastructure with sustainable travel choices for both passengers and employees. Improved access is a key element in our plans to attract more airlines and passengers 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.

Our previous Surface Access Plan in 2011 set the following 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.

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

Through a collaborative approach, led by the airport's Transport Forum, Stansted has been highly successful in expanding its rail, coach and bus services over the last decade. It is among the best performing airports in the UK and Europe for the percentage of trips by public transport. The latest CAA survey (2013) confirms the continuing increase in the use of public transport by air passengers, with 51% using bus, coach and rail services.

As passenger numbers increase, we will work to ensure there is a commensurate increase in public transport use. To achieve this, we will focus on 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 need to enhance the quality of rail access to Stansted from London, Cambridge and other key markets, particularly in terms of journey times and value for money, to maximise the potential 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 current coach and rail services either don't exist or are limited in scope and frequency.

Specifically, we will maintain at least 50% modal share of public transport to the end of 2019; look to grow rail modal share from 22% to 25% by the end of 2019; and reduce single car occupancy for staff travel to no more than 65% by end of 2019.

### LAND USE

We will make the best and most efficient use of our land; providing a safe, efficient and commercial operation to allow our business and those of our tenants and partners to develop and grow.



International airports are large and complex sites, with a wide range of buildings and facilities to meet the needs of passengers, airlines and service providers. Stansted benefits from being an extensive, modern and well planned airport. It was originally designed to accommodate steady and progressive development. This means much of the core infrastructure is already in place – a runway, terminal, cargo centre and road and rail system. Supporting facilities, such as maintenance hangars, hotels and car parks have been developed as the airport has grown.

The draft Land Use Plan identifies the land, uses and facilities required to support the airport up to the capacity of its single runway, which we assess to be between 40 and 45 million passengers a year. Our current planning permissions limit our growth to 35 million passengers. We believe the additional throughput can be handled within the constraints and limits of our planning permission and without major new facilities. Importantly, our development requirements can be met within the existing airport boundary and in line with planning policies for the region.

These factors make Stansted unique among the major South East airports. Our current site has the capability to handle a doubling of traffic. By comparison, Heathrow and Gatwick are virtually full, and have limited scope to grow without new runways and terminals.

The basic layout of the site will remain as it is today. Within each land use zone we expect to see change, investment and improvement as the needs of passengers and service partners continue to evolve and new opportunities arise. At the same time, we will manage and contain our environmental impact – ensuring that we retain the strong landscape setting that helps mitigate impacts on local communities.

Our runway and airfield are modern and fully capable of handling all types of aircraft. Minor additions to the taxiway system may be needed in order to achieve maximum runway capacity. Space has been reserved to add additional aircraft stands – both for passenger aircraft (adjacent to the terminal and served by new piers) and for cargo aircraft (around an extended freight terminal).

We are currently spending £80 million transforming the passenger terminal. A new, larger security area has now opened and the new airside departure lounge will be completed by 2015. This will provide additional capacity and a much improved passenger experience. The terminal is designed in a modular form; with space reserved to add one or two bays to the east and west.

The terminal area is the most intensively used part of the site, containing our major transport facilities (bus, coach and rail station) and short stay car parking. Additional office and hotel accommodation is planned for this area, within easy reach of the terminal and public transport.

## LAND USE



Away from the terminal area, there is room to expand the existing maintenance, cargo and support activities (e.g. car hire and roadside facilities). On the north side of the runway is where the airport originally developed. This is an area ripe for change and in need of investment and redevelopment; with an inefficient layout and some old and out-dated buildings and facilities. It will remain home to our modern general aviation facilities and some essential operational uses. However, as proposed in the draft Uttlesford Local Plan, there are around 18 hectares of land that can be used to meet economic and employment needs in the wider area. We are preparing a more detailed master plan for this area.

We expect our long stay car parking areas to remain in their current location – around Southgate and off Bury Lodge Lane. We will need to increase the capacity on site; in line with our transport strategy of providing enough space on site to meet demand and reducing the amount of ‘kiss and fly’ and taxi use. These generate a higher number of road trips than either public transport use or parking on site.



### ENVIRONMENT

We recognise the operation and development of our airport has environmental impacts ranging from a global level to those experienced more locally in relation to aircraft noise, local air quality and landscape. M.A.G places great emphasis on reducing our impact on the environment and balancing our operations as a commercial airport operator.



Successful environmental management incorporates every area, so as well as reducing carbon emissions and noise impacts, we also work hard to manage and control our impacts relating to water, waste, ecology and land use.

In order to achieve this, we will:

- develop and grow our business in a managed and sustainable manner optimising the economic and social benefits of the airport, whilst limiting the impact on the environment;
- work across all business areas to engage the combined skills and energy of all our employees;
- facilitate a constructive and open dialogue with all stakeholders, including local communities;
- maintain an environmental management system that targets key areas and audits and monitors performance in a challenging and critical way; and
- comply with the requirements of environmental legislation and other requirements at all times and to prevent pollution and reduce our contribution to climate change.

To manage the impact of climate change we will aim to make our airport operations carbon neutral. To achieve this we are working together with our on-airport business partners to reduce the airport's energy consumption. We will prioritise and increase our take-up of renewable fuels as part of our drive to reduce the airport's carbon emissions.

Air quality continues to be an important issue for communities around airports. Our analysis shows that air quality standards will be met in the areas around the airport as it grows to the full use of the runway. We will continue to take measures to minimise emissions that impact on local air quality and also ensure that concentrations of pollutants continue to be below the relevant national thresholds. To help reduce emissions we are improving air quality assessment and monitoring, influencing airlines to cut emissions from aircraft, and reducing emissions generated by ground vehicles.

For those living closest to the airport and its flight paths, aircraft noise can be intrusive and disruptive. Our analysis shows that noise impacts will remain well below the limits previously established as part of the planning permission for Stansted to grow to 35mppa. We will work with partners including community groups, airlines, air traffic control and Government to seek to understand and minimise the impact of all aspects of noise and drive forward change where possible. Our aim and commitment is to manage, and reduce where possible, the number of people affected by noise as a result of our operations.

## ENVIRONMENT



We manage waste in accordance with the principles of the waste hierarchy, which is to reduce waste generation, re-use, recycle, recovery, and then, as a last resort, to dispose of waste to landfill. We have set ambitious targets of sending zero waste to landfill and recycling 70% of waste by 2020.

We are committed to improving our water efficiency and preventing pollution and will continue to look for opportunities to reduce our water use and to encourage other on-site companies to do the same.

The airport is surrounded by a number of ecologically diverse habitats including the medieval Hatfield Forest. Within the constraints imposed by the normal operation of the airport, we promote the development of rich and varied habitats, seeking to integrate the airport within its rural setting and promoting access to the airport site.



### COMMUNITY

By building enduring relationships with our local communities, we will seek to understand the issues that are important to them, to understand how our operations affect them and to use our combined skills and resources to work together for our mutual benefit.



M.A.G recognises that airport operations have both positive and negative impacts on the communities around the airport. The draft Community Plan sets out where we propose to focus our engagement with local communities so that we contribute to the social and economic well-being of those living around Stansted. As part of the plan we will continue our proactive approach to working with our neighbours so that we can better understand their needs and their concerns. Following discussions with key stakeholders, we have highlighted five priority areas for our community plan:

- Education and employment
- Investing in the community
- Community and local business engagement
- Employee engagement
- Managing local impacts

Engaging with young people, particularly those living in areas close to the airport, is a vital part of our work. We want to encourage and inspire young people to think about what the airport does, why it does it, and the career opportunities that are available to them now and in the future. With this in mind we propose to create a new education centre, designed to provide a flexible and inspirational learning environment for children and young adults.

We also plan to develop further our work experience programme and improve the on-site Employment and Skills Academy to be an even more valuable resource to help young jobseekers into employment.

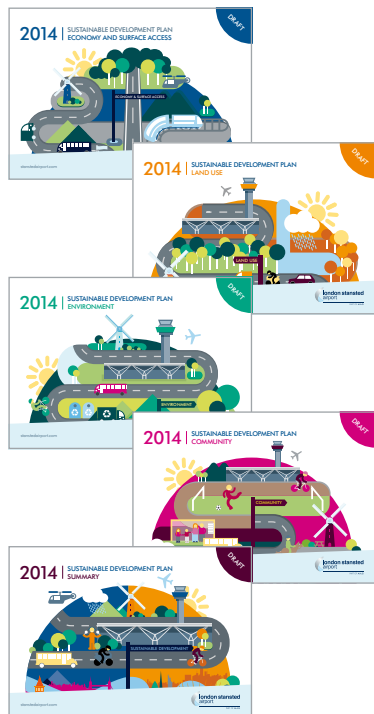
Community and business engagement is also vital to the success of the airport. As Stansted grows, we commit to increasing our outreach in the local community through regular information events and employee volunteering, while at the same time ensuring we play an active role in supporting the businesses community to grow and flourish.

Finally, we recognise the importance of managing our impacts on the community. Stansted is the third biggest airport in London and aircraft noise is a significant concern for our neighbours. To help mitigate some of those concerns we propose a wide ranging review of our sound insulation schemes while at the same time ensuring we have a robust complaints procedure in place.



### CONCLUSION

The purpose of this draft SDP is to set out our provisional view on how Stansted will develop to the capacity of its single runway, which we believe is in the range of 40-45mppa. This information will help inform the Airports Commission's consideration of the implications of Stansted's growth to the capacity of the single runway.



Stansted has planning permission to grow to a passenger throughput of 35mppa. As part of this permission, there is a package of commitments relating to the airport's impacts, including aircraft noise, air quality and surface access. M.A.G remains committed to honouring these conditions.

We recognise that growing to the capacity of the runway represents a significant increase in throughput compared with the current level of 18mppa. We see the value in providing local communities and other stakeholders with a clear view of what this level of growth will entail, in terms of airport infrastructure, environmental and economic impacts, surface access requirements and community engagement.

The analysis contained in this draft Plan shows how growth to the capacity of the single runway can be contained within the current, well defined airport boundaries by making better use of our existing core infrastructure. Importantly, our analysis shows that growth up to the full capacity of the runway can also be contained within the existing environmental limits agreed as part of the 35mppa planning permission. For example, modelling of future noise impacts shows that growth up to the full use of the runway can be accommodated within the existing contour cap.

Our draft Plan also shows how the road infrastructure and rail services serving the airport would need to develop to support the airport's growth to the capacity of its runway. The SDP sets out how the value of Stansted's economic contribution will rise, and its increasingly important role in the successful delivery of local and regional economy growth objectives. We have also set out how we propose to develop our engagement with the local community to ensure the benefits of growth are felt by those living around the airport.

The existing planning permission continues to provide the appropriate framework for Stansted's growth to 35mppa, and there is no immediate need for us to seek a lifting of the current planning cap to enable growth beyond that level. At the appropriate time, we would need to amend that cap to enable us to make maximum use of the capacity provided by the existing runway. As part of the consultation process we would like to hear stakeholder views on the appropriate timing for addressing this issue to see if there is consensus on the most appropriate way forward.

Throughout the consultation period we will be giving those with an interest in Stansted's future an opportunity to talk to us, discuss the issues set out in this draft and share their views. Towards the end of this year, we intend to produce a final version of this Plan which will take account of the views we receive and provide a clear view of how we plan to make use of Stansted's existing capacity.

# OUR CONSULTATION PROCESS

## CONSULTATION PROCESS AND HOW TO CONTACT US



The draft Sustainable Development Plan is an important document for us. It helps set out what M.A.G's 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. The airport is committed to being open in sharing this vision for Stansted Airport and the local area. The plan looks to where possible, reflect local views and ideas.

Neighbours, stakeholders and a wide range of organisations in the region are to be consulted to obtain their views. This will include public events, informal and formal briefings. The draft Sustainable Development Plan documents will be made widely available.

In each of the four topic Plans are some specific questions relating to that topic. But we also want to hear views more generally on our approach, the issues and the various targets and policies we propose.

The closing date for comments is Friday 7th November 2014. After that, we will carefully consider all the comments we receive. We expect to publish a final version of the Plan in late 2014.

### HOW TO CONTACT US

To obtain copies of the draft Sustainable Development Plan:

Visit: [stanstedairport.com/developmentplan](http://stanstedairport.com/developmentplan)

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