



LONDON CITY AIRPORT MASTER PLAN

STATEMENT OF INTENT

December 2004

City Aviation House
London City Airport
Royal Docks
London E16 2PB
www.londoncityairport.com



CONTENTS

1. Introduction
2. Scheduled Passenger Traffic Forecasts for London City Airport
3. Corporate Aviation
4. London City Airport Master Plan Description
5. Going Forward



1. INTRODUCTION

- 1.1 The White Paper, *The Future of Air Transport*, published in December 2003 stated that the Government expects airport operators to produce master plans to take account of the conclusions on future developments set out in the White Paper in order that they can inform the content of Local Development Frameworks. In July 2004 after feedback from stakeholders for further clarity on this expectation, the Government published 'Guidance on the Preparation of Airport Master Plans'. This document helpfully details the purpose, scope, process and timetable for producing master plans.
- 1.2 London City Airport does not have an existing master plan that can be updated and therefore it has not been possible to produce a full master plan in the 6 months following the publication of the Guidance. During 2004 however, London City Airport has succeeded in further formulating its passenger forecasts and outline development proposals and is able to present them here in a high level statement of intent.
- 1.3 This statement of intent contains passenger forecasts for London City Airport detailing reasons why we believe the ultimate potential of the London City Airport site is greater than that suggested by the Government in the White Paper.



2. SCHEDULED PASSENGER TRAFFIC FORECASTS FOR LONDON CITY AIRPORT

INTRODUCTION

2.1 This section sets out long-term projections of demand for scheduled air services at London City Airport (LCY). Two different sources or approaches have been used to determine a Base Case Forecast for LCY:

- Government forecasts
- Forecast growth in the London working population particularly the finance and business services sectors based in LCY's key catchment areas, and the correlation between recent growth in London's finance and business services sector and passenger growth at LCY.

2.2 Factual information about the growth of East London and the Thames Gateway has further supported the final base case forecast for scheduled passenger traffic.

2.3 Demand, and forecasts for Corporate Aviation are discussed later in Chapter 3.

GOVERNMENT FORECASTS

Government Studies Informing White Paper Process (SERAS & RASCO)

2.4 In preparing its aviation White Paper, the Government completed a study of South East and East of England Regional Air Services (SERAS). In addition it published six Regional Air Services (RAS) studies covering Wales, Scotland, the South West, Northern Ireland, the Midlands and the North of England. The latter have been integrated within the over-arching Regional Air Services Co-ordination (RASCO) Study. The SERAS and RASCO studies were published with the White Paper consultation process launched in July 2002. These documents included the DTLR 2000 aviation forecasts updated to include in addition the years 2020 to 2030.

Forecasts by Market Segment

2.5 Key points from the DTLR 2000 forecasts are:

- Total passengers in 2020 is 400 million passengers per annum (mppa), split 330mppa international and 70mppa domestic
- Overall growth in air travel is predicted at 4.3% a year



London City Airport – Master Plan – Statement of Intent

- Short haul, international, business travel growth rates:
 - UK-originating to increase at 4.7% a year to 20mppa by 2020
 - Foreign-originating to increase at 9.1% a year to 25mppa by 2025
 - Overall growth rate in this segment 6.6%
- Short haul, international, leisure travel growth is predicted at 4% a year
- Domestic travel between London and the regions is predicted to increase at 3.3% a year

Overall Forecasts for South East England

- 2.6 The Government's headline prediction is that with steadily increasing GDP and propensity to travel, the demand for air travel in the South East of England will double by 2020 and reach 301 mppa by 2030.
- 2.7 The Aviation White Paper supports the provision of two new runways in the South East of England by 2030 to accommodate this demand although it is unlikely that the first, at Stansted airport could be delivered sooner than 2012. During this time LCY's main competitor, Heathrow, will have little if any spare capacity to accommodate growth in regional/short haul services.

SERAS Forecasts for London City Airport

- 2.8 The South-East consultation document considers London City Airport to be a 'first tier' airport of the South East alongside Southampton and Norwich airports. Each of these airports is considered to be able to play an important niche role in the future. LCY is identified as specialising as a mainly business airport.

- 2.9 The main consultation document states the following in relation to London City Airport:

Retention of the existing 1200m runway with a new runway holding area, apron extension and additional terminal capacity. This would continue to support services using aircraft of a similar nature to those used today and assumes maximum use of the existing runway within the current air transport movement limits. The terminal capacity of this option is around 5mppa.*

- 2.10 *The current air transport movement limits for London City Airport are 73,000 per year.

- 2.11 The DfT air passenger forecasting model presents forecasts for London City Airport under two different demand scenarios:



London City Airport – Master Plan – Statement of Intent

- (i) with no additional runway capacity in the South East but maximum use made of existing runways at the main airports (constrained case)
- (ii) one with three new runways at the main airports (high capacity).

Fig. 1.0 Government Passenger Forecasts for LCY (SERAS, 2002)

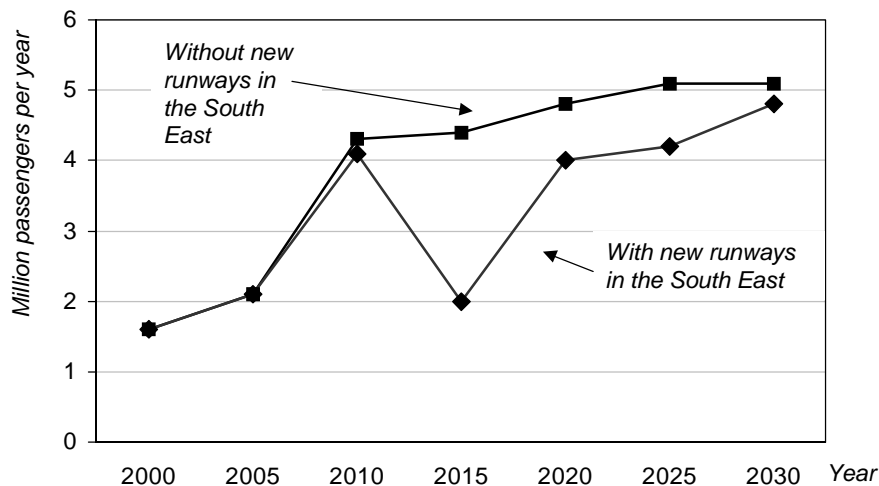


Table 1.0 – Government Forecasts for LCY (SERAS, 2002)

Scenario	2002	2005	2010	2015	2020	2025	2030
a) SE Runway Capacity Constrained	N/A	2.1	4.3	4.3	4.8	5.1	5.1
b) SE Runway Capacity Less Constrained	N/A	2.1	4.1	2.0	4.0	4.2	4.8

2.12 Both these forecasts show London City Airport attaining a passenger throughput of approximately 5mppa by 2030, after which growth is viewed as being capped by the current air transport movement limit of 73,000 movements per year.

London City Airport’s View on the SERAS Forecasts

2.13 London City Airport does not agree with these forecasts for the following reasons:

- Under both scenarios, the forecasts show that LCY would attract traffic quickly if there are capacity constraints elsewhere in the South East. If extra runways are provided in the South East, Government forecasts show that



London City Airport – Master Plan – Statement of Intent

London City Airport will retain much of its traffic in the longer term. LCY concurs with this statement. However LCY believes it is unlikely that an annual throughput in excess of 4 mppa will be reached by 2010 as this would require annual growth of 17% over each of the next 6 years.

- It is also unlikely that LCY will experience a dramatic fall in its passenger throughput in the years 2010 to 2015 even if runway capacity is provided at Stansted or Heathrow. This is due to the presence of strong local City and Docklands based demand that to date has proved loyal to LCY because of LCY's unique service features. It is also unlikely that a second runway could be provided in the South East by 2010. Indeed the White Paper acknowledges that a second runway at Stansted Airport is unlikely to be operational until 2012. The prospect of a third runway at Heathrow by 2015 is therefore also unlikely since the runway at Stansted is proposed to be built first.
- LCY believes that the Government's assumption that 5mppa could be achieved within 73,000 movements a year is optimistic as this implies 68 passengers per air transport movement (ATM), and thus larger aircraft and load factors than are likely to be achieved while London City Airport serves a primarily business-focused market. There is no sign that the Government's assumption of an average aircraft size of 100 seats at LCY is realistic.
- The Government has taken 73,000 ATMs as a finite physical capacity limit rather than a planning constraint.

2.14 When the Secretary of State for Transport, Alistair Darling, launched the Future of Air Transport consultation in parliament in July 2002, he stated that 'doing nothing is not an option' and that 'as a first step we need to do all we possibly can to make the most of existing capacity'.

2.15 It appears that this option proposed for LCY in the consultation document is at odds with the sentiment expressed by the Secretary of State since it refers to the current air transport limits imposed on LCY by the local planning authority, the London Borough of Newham.

2.16 The current annual air transport movement limit of 73,000 was granted in 1997 when the airport applied to double the previous limit of 36,500 ATMs in order to allow the maximum use of existing infrastructure and allow the economic benefits flowing from more air services to be secured by the local community. At no time has the ultimate physical capacity of the runway been assessed as limited to only 73,000 ATMs. Indeed single runways elsewhere can be seen to have significantly higher capacities, one example being Gatwick with 250,000 ATMs in 2000.



London City Airport – Master Plan – Statement of Intent

- 2.17 LCY believes that its future growth should not be artificially constrained by the current planning limit on ATMs. The White Paper acknowledges LCY's response to the consultation by recognising that with further development, a higher throughput than 5mppa could be achieved. LCY envisages long-term growth potential well beyond 73,000ATMs and 5mppa.

GROWTH IN LONDON

- 2.18 One of the reasons that LCY strongly believes that its growth potential extends beyond 5mppa is because of forecasts and strategic direction given by the Greater London Authority in its London Plan published in February 2004. This plan provides the economic, social and environmental framework to guide London's future development until 2020. The London Plan details the development strategy for five distinct sub-regions of the city: West, North, Central, South and East. Within each sub-region of the Plan, 3 types of area are identified with the scope for the most significant development or change. These areas are Opportunity Areas, Areas for Regeneration and Areas for Intensification.
- 2.19 Opportunity Areas are brownfield sites and places with potential for increases in density. These are primarily identified as being located in the east of London along the Thames Gateway. It is proposed that such areas would typically accommodate at least 5,000 jobs or 2,500 homes or a mix of the two. Areas for Regeneration - those prioritised for action and investment particularly in the fields of housing, education, employment, environment and health - are also concentrated in East London, north of the River Thames.
- 2.20 East London and the Thames Gateway are identified in the London Plan as the 'priority' sub-region because it has the highest number of the capital's Opportunity Areas and Areas for Regeneration. The document says '*much of the forecast growth should be accommodated in areas close to the City including the City fringe, Isle of Dogs, Stratford and along the Thames Gateway. In addition to a high level of economic development, East London should accommodate significant new housing*'. It goes on '*East London should become London's gateway to mainland Europe, building particularly on the Stratford International Railway Station, but also on access to City and Stansted airports, the Channel Tunnel and the Port of London.....Stratford should take advantage of its proximity to the Channel Tunnel Rail Link (CTRL) and the enhanced links this will bring to the wider South East region and Europe to promote itself as a home for European Business.*
- 2.21 We have extracted (below) some of the data from the London Plan that clearly identifies East London for future economic growth.



POPULATION GROWTH IN LONDON

- 2.22 The London Plan predicts a population increase in London of 800,000 people between 2002 and 2016. This is equivalent to a city the size of Leeds. London’s working age population is predicted to grow by 516,000 people over this time period.
- 2.23 To meet the planned population growth of 800,000 people, the London Plan forecasts that the number of households in London will need to grow by 336,000 to 2016. This is equivalent to 22,400 additional households per year.
- 2.24 Table 1.1 below summarises the spatial allocation of jobs and housing across London. This clearly identifies East London as the recipient of almost a third of all of London’s housing provision until 2016 and an even greater proportion of London’s jobs.

Table 1.1 Minimum homes and jobs targets for London’s sub-regions to 2016

Sub-Region	Housing Allocation	Proportion of Total (%)	Jobs Allocation	Proportion of Total (%)
Central London	140,000	30.5	239,000	37.5
East London	142,000	31	249,000	39
West London	60,000	13	86,000	13.5
North London	60,000	13	26,000	4
South London	57,000	12.5	36,000	6
TOTAL	MINIMUM OF 459,000	100	MINIMUM OF 636,000	100

Source: The London Plan GLA 2004

EMPLOYMENT GROWTH IN FINANCE AND BUSINESS SERVICES SECTORS AND IMPACT ON DEMAND FOR LCY

- 2.25 Projections for the Mayor’s London Plan suggest that total employment in London will increase by 636,417 jobs between 2001 and 2016. As Table 1.2 shows, the largest volume (69%) of the total increase in employment over this period will come from the Business Services sector (accountancy, law, management consultancy, corporate finance advice, telecommunications, advertising, marketing services and new media). The greatest percentage increase will be seen in ‘Other Services’ - predicted to grow by 50%. ‘Other Services’ refers to entertainment, leisure and creative industries.



London City Airport – Master Plan – Statement of Intent

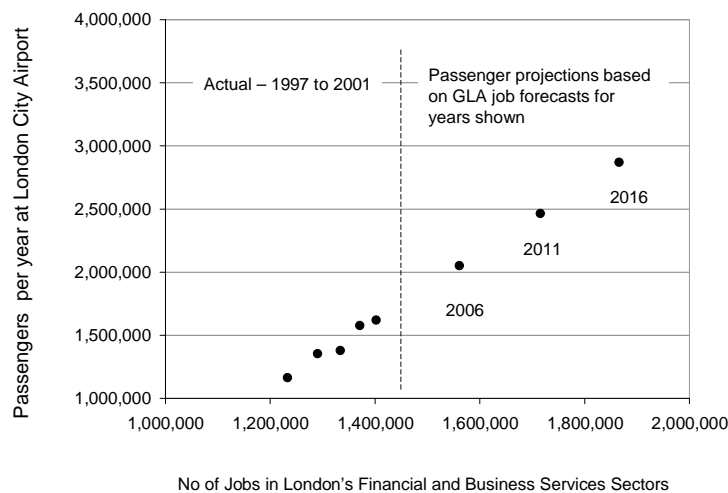
Table 1.2 Employment Projections for Growth Sectors

Year/Sector	Hotels & Restaurants	Financial Services	Business Services	Health & Education	Other Services
2001	303,583	249,667	1,152,667	610,000	351,750
2006	350,000	260,000	1,300,000	627,000	415,000
2011	400,000	270,000	1,445,000	644,000	470,000
2016	445,000	275,000	1,590,000	660,000	530,000
Increase	141,417	25,333	437,333	50,000	178,250

Source GLA (Volterra Consultants) 2002

- 2.26 One of the reasons that LCY strongly believes that its growth potential extends beyond 5mppa is because work has been undertaken on the relationship between passenger growth at LCY and both the growth in financial and business service employment and the growth of employment on the Canary Wharf Estate.
- 2.27 Linear regression was used to determine the correlation between passenger numbers from 1997 to 2001 inclusive and the numbers of persons working in the business and financial services sector within London.
- 2.28 The regression relationship was then used to predict LCY passenger growth on the basis of Greater London Authority’s forecast growth in business and financial services sector jobs in London. A similar approach was used in relation to recent and forecast growth in employment at the Canary Wharf estate. The results are shown in Figures 1.1 and 1.2.

Figure 1.1 - Growth of Financial and Business Services and London City Airport Passengers

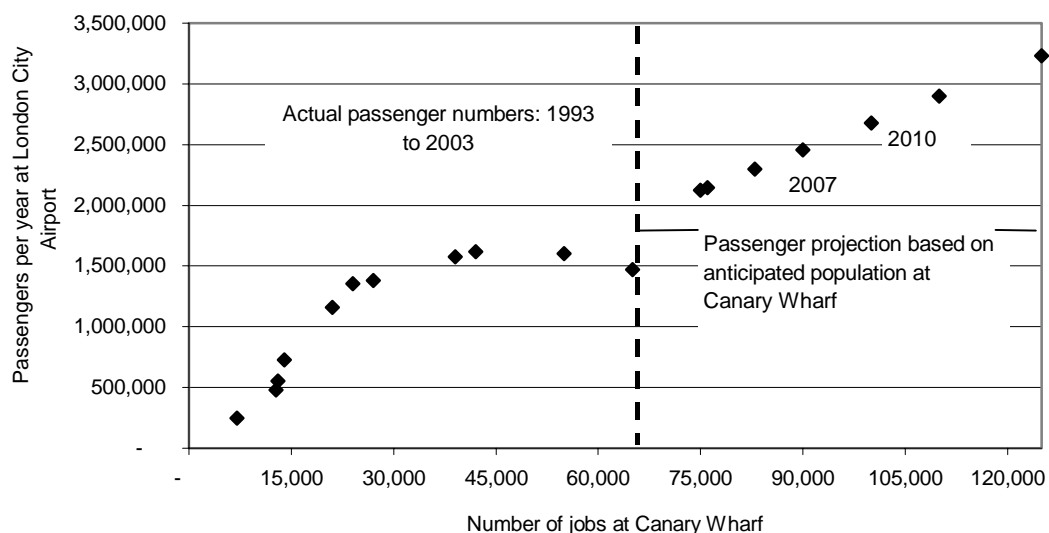




London City Airport - Master Plan - Statement of Intent

2.29 On the basis alone of employment growth in the financial and business services sectors overall, passenger numbers are predicted to exceed 2mppa before 2006 and reach 2.9mppa by 2016. However, we firmly believe this figure to be an underestimate, as this does not take into account the advent of the direct Docklands Light Railway (DLR) service to LCY in 2005 that will make LCY more attractive and increase its share of market demand. The DLR service will provide a direct fixed rail link between LCY, Canary Wharf and the City, key catchment areas for the airport. The further extension of the DLR south of the river to Woolwich in 2008, with a multitude of onward connections possible from there to south-east London and Kent, bolsters further LCY's catchment area to the east into the Thames Gateway.

Figure 1.2 - Growth of Employment on Canary Wharf Estate and London City Airport Passengers



Note: Figures 1.1 and 1.2 are based on linear regression analysis with strong correlation coefficients. However, the further ahead the results are used to predict, the less reliable they become. The results also depend on the reliability of the forecast numbers of jobs in the financial services sector and at Canary Wharf estate, and these are related to one another.

2.30 On the basis of employment growth on the Canary Wharf estate, Figure 1.2 predicts 2.7mppa at LCY by 2010, which is as far as Canary Wharf group's publicly available and date related forecasts currently extend. The Canary Wharf Group estimates that once all the land that it owns is fully developed 125,000 people will work on its estate. It is not prepared to forecast when all land will be fully developed. However, it is interesting to note that in 2002 the final working population at Canary Wharf was estimated to be only 90,000 -100,000. The working population on the Canary Wharf estate at the end of 2004 is 65,000.



London City Airport - Master Plan - Statement of Intent

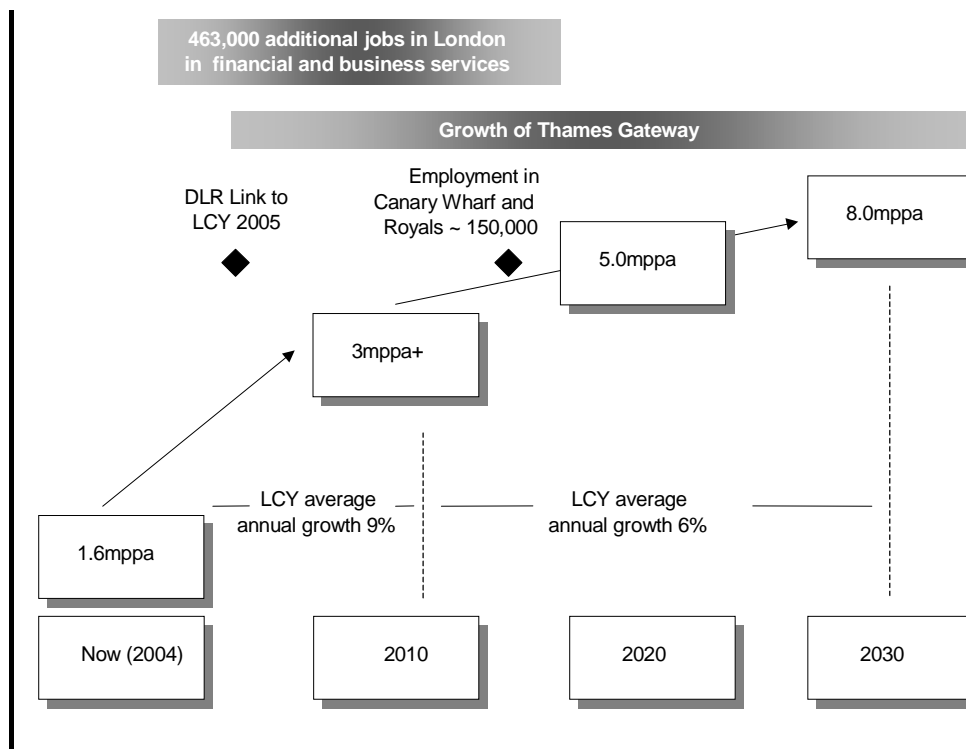
- 2.31 Again, we believe this projection to be an underestimate for the reason mentioned above and due to the fact they do not take into account the shortfall in capacity elsewhere in the South East, notably at Heathrow, and the overspill from Heathrow to LCY.
- 2.32 There will also be additional growth in the Docklands locality, including 20,000 jobs projected at the Millennium Quarter south of the Canary Wharf estate by 2015 and a further 30,000 jobs in the Royal Docks area in a similar timeframe, bringing the total to perhaps 150,000 jobs in the whole Docklands area by 2015 in financial and business support services.
- 2.33 The financial sector's slowdown and job losses halted passenger growth at LCY in 2002 and 2003 at LCY. Growth has returned in 2004 and it is expected that the full calendar year will see approximately 1.67 million passengers, the highest the airport has even seen.
- 2.34 The LCY team that compiled LCY's SERAS consultation response in 2002 undertook some research on current and future purchasing habits of corporate firms. The results showed that such companies are focused on cost reduction and streamlining procurement by focusing on travel policy compliance, cutting the cost of ground travel to airports (for which DLR will be welcome) and switching to self-booking of flights using self-service reservation systems on corporate intranets to reduce travel agents' commissions.
- 2.35 Despite the cyclical downturn and employment reductions that were occurring at the time the LCY survey was carried out in the finance sector, most corporate firms claimed they had no plans to replace business travel with alternatives such as video-conferencing or use budget airlines.



FORECAST FOR LCY

The Base Case

Figure 1.3 – Base Case Forecast & Assumptions



- 2.36 Government forecasts for LCY, and projections based on growth in financial and business services suggest demand of 3.0mppa by 2010. This corresponds to an average growth rate of 9% a year, similar to the rate of growth at LCY between 1997 and 2001. LCY's 2000 forecasts in connection with the Operational Improvements Programme – the planning permission already granted for the physical expansion of the airport by a runway holding point and 4 or 5 extra apron stands – predicted 2.98m scheduled passengers by 2010.
- 2.37 Government forecast growth rates to 2020 (DETR, 2000) for short-haul business and leisure market segments stated above have been taken into account in determining this base case.
- 2.38 After 2010 growth is expected to slow. Reasons for this include the opening at Heathrow of Terminal 5 Phase 1 in 2007 and Phase 2 in 2011, a Crossrail link to Heathrow after 2010 ahead of a possible station in the Royal Docks and by 2012 an additional runway at Stansted. Forecasting beyond 2010 the base case assumes 6% annual growth



2.39 Table 1.3 shows the forecast scheduled passenger numbers by 5-year intervals.

Table 1.3 Base Case Forecast for LCY 2004-2030

	2004	2005	2010	2015	2020	2025	2030
Base Case	1.67	1.84	3.0	3.87	5.0	6.3	8.0

Characteristics of Future Demand

- 2.40 It is not anticipated that the operating hours of the airport will significantly change in the future. Thus the increasing volume of passengers will be accommodated within the same hours by increasing the proportion of traffic handled in off peak periods.
- 2.41 The average hourly passenger loads are expected to increase at a relatively higher rate during off-peak hours than in the peak hours. This will arise from the increased frequencies on the major routes providing more attractive mid-day travel options for business travellers, together with an increasing development of the leisure market at LCY. In addition it is anticipated that the average aircraft size will increase relatively less during these peak periods.



3. CORPORATE AVIATION

SERAS Forecast Demand for Corporate Aviation in the South East

- 3.1 One of the documents published by the Government when it launched the Aviation White Paper consultation process in July 2002, was a study on the demand for business aviation services in the South East.
- 3.2 The study acknowledges that this sector of the market has to date largely relied on ability to access slots at the major airports in the South East (particularly Heathrow and Gatwick and increasingly Luton and Stansted). The trend for corporate aviation to be pushed out of the major airports, in favour of using the slots for more valuable commercial traffic, is unlikely to be reversed.
- 3.3 Government forecasts (SERAS supporting study ‘Business Aviation in the South East Part 3: Future Capacity for Business Aviation’ May 2002, Table 1) predict corporate aviation growth rates of between 0% and 3%.
- 3.4 The SERAS Business Aviation Study predicts a substantial shortfall in capacity for corporate aviation in the South East. It predicts only 5,000 movements at Heathrow, Gatwick, Stansted and Luton in 2030 compared with 36,000 movements at these airports now. Alternative sites identified for corporate aviation ‘near’ London include Biggin Hill, Blackbushe, Fair Oaks, Farnborough, Northolt and Southend. The government expects Farnborough and Northolt will together be constrained to fewer than 40,000 movements of all types. The other airports identified for corporate aviation lack facilities or suffer in terms of their distance from London and poor connections. The SERAS study suggests that the shortfall in capacity to meet corporate aviation demand in the South East will be felt as early as 2005 and will get progressively worse reaching a capacity shortfall of some 100,000 movements by 2030, representing 68% of the total market demand.
- 3.5 This study forecast 1,000 corporate aircraft movements per year at LCY for the entire 30-year planning timeframe. In the 12 months to November 2004, LCY handled 6,631 corporate aviation movements.
- 3.6 London City Airport believes that the Government has under-estimated the contribution that LCY can make towards meeting demand for business aviation services in the South East.



London City Airport – Master Plan – Statement of Intent

3.7 Our reasons are as follows:

- Part of the reason for the under-estimate may be the fact that the study was 5 years old when it informed the consultation process.
- The principal drivers of corporate aviation are speed, convenience and discretion. Corporate aviation complements the scheduled aviation business at LCY because it allows users to reach destinations not served by scheduled carriers. It allows clients to visit maybe 3 or 4 destinations in a single working day; something not achievable using scheduled carriers.
- These drivers are the reasons for corporate aviation being likely to grow strongly at London City Airport in future years. LCY, being the closest airport to central London, is in a prime position to cater for this market that otherwise has to be accommodated at airports on the fringes of London, or not in London at all. A passenger using LCY can be in the centre of London in less than 30 minutes. This is not achievable at any of the other airports identified by the Government as being sites to accommodate future demand for corporate aviation.
- Corporate aviation in Europe is forecast to grow strongly in the coming years due to the rise in Europe of a US originating innovation, fractional ownership, where 100% aircraft ownership is not necessary. The corporate equivalent to 'low-cost' scheduled airlines, it is possible to purchase a fractional interest equivalent to a given number of hours of use. Netjets is the leader in this field and owns and operates manages around 500 aircraft worldwide with orders for a further 1,200. Netjets Europe was launched in 1996 and today has a fleet of 50 aircraft based in Europe. Netjets, already a customer of LCY, had 9,768 movements in the 12 months July 2003 – June 2004 in the London area. Of these 1,672 or 17% were handled at London City Airport. Of all the European airports that Netjets flew to during the same period, LCY was the 6th most used airport. In the eleven months to November 2004 Netjets operated 2,535 movements at LCY.
- LCY is ideally positioned to accommodate some of the demand arising in central and east London.
- Aircraft types such as the Dassault Falcon series and Cessna Citation series, which account for a significant proportion of business aviation fleets, are certified for use at LCY. Approximately 40% of all European corporate jets can access LCY. London City Airport has only recently begun to market this



London City Airport – Master Plan – Statement of Intent

business seriously and new operators are applying for permission to use the facility on a weekly basis. This strong level of interest has exceeded all expectations.

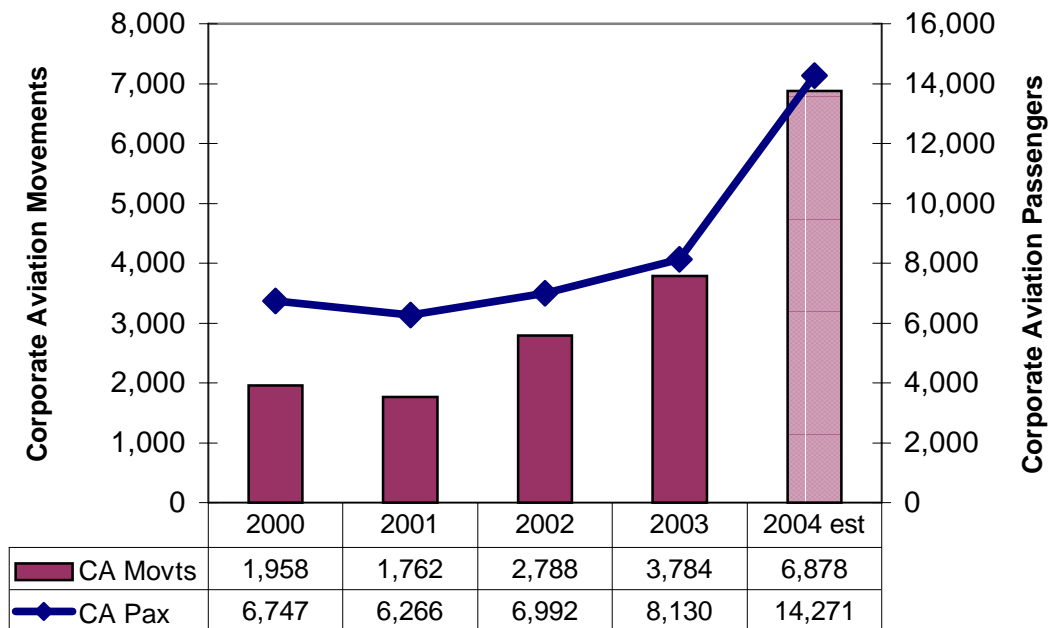
- 3.8 London City Airport’s corporate Jet Centre is ideally placed to continue providing capacity for this section of the market and LCY welcomes the Government’s general statement in the White Paper as set out in the paragraph below:

The ability of business aviation to gain access to the main airports in South East will continue to be problematic as capacity constraints cause airport to focus on more valuable commercial traffic. The Government recognises the important contribution made by small airports in the South East in providing capacity for business aviation. We support the adoption of policies which encourage the continued provision of these services.

FORECAST FOR LONDON CITY AIRPORT

- 3.9 Corporate aviation trends for London City Airport for the past 5 years are shown in Figure 2.0. The high growth rates experienced over the past couple of years support the points made above and have been possible due to the new dedicated facility.

Figure 2.0 – Corporate Aviation Movements and Passengers at London City Airport 2000 to 2004 (est)





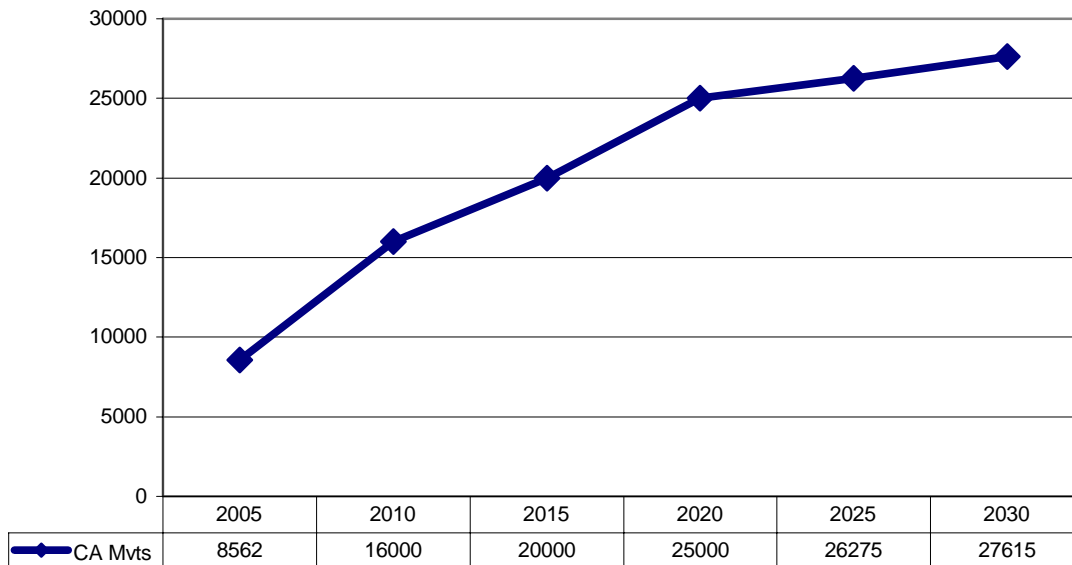
London City Airport - Master Plan - Statement of Intent

3.10 London City Airport expects further rapid early corporate aviation growth rates, reducing in the longer term, to give a long term forecast as shown in Table 2.0 and Figure 2.2.

Table 2.0 - Corporate Aviation Movements for South East & London City Airport

Scenario	2005	2010	2015	2020	2025	2030
LCY Forecast	8,562	16,000	20,000	25,000	26,275	27,615
SERAS 'High' Scenario for all South East Airports	-	81,000	-	109,000	-	146,000
LCY Market Share	-	20%	-	23%	-	17%

Fig 2.2 Forecast Corporate Aviation Movements at London City Airport 2005-2030





4. LONDON CITY AIRPORT MASTER PLAN DESCRIPTION

INTRODUCTION

- 4.1 This chapter details the phases of development planned for the airport site and immediate environs. The phases detailed below cover a period of 20 – 25 years, depending upon commercial demand for the Airport.
- 4.2 The development begins with a base case (Phase 1). This represents the scenario from the completion of the Docklands Light Railway (DLR) airport extension scheduled by late 2005.
- 4.3 The description of development occurring in phases 2, 3 and 4 is grouped by category of activity or infrastructure and guides the reader through the plans from the western end of the airport site to the eastern end of the site. Once the site is fully developed it is expected to be able to accommodate approximately 8mppa.

PHASE 1

Base Case 2005

- 4.4 This phase represents the airport in 2005 with the corporate aviation Jet Centre building, main terminal building and pier fixed in their current locations, alongside the runway and new holding point completed in autumn 2003. The airside roadway runs adjacent and parallel to the pier and aircraft self-manoeuvre onto stand.
- 4.5 Shown on this base case is the alignment of the DLR together with altered surface access arrangements, the DLR London City Airport station and the link into the terminal currently being constructed. The completion of the DLR will result in an increase in the amount of land designated as ‘airside’ at the western end of the airfield. Also shown is the addition of the eastern apron built over the King George V Dock next to the terminal. This is designed around the largest aircraft likely to operate.
- 4.6 The location of the replaced airport headquarters building, City Aviation House, a new compound for use by car hire operators and a new in-flight catering building is also shown. The maintenance facilities currently housed in the ‘blue shed’ warehouse and the location of the Royal Docks Water Ski Club are identified. The alignment of



the DLR is shown as extending eastwards to King George V station from where it will proceed underground to Woolwich by 2008.

PHASE 2

Jet Centre

- 4.7 The Jet Centre building doubles its size from the base case by expanding on the western side of the building with 6 modules width. Further landside car parking may accompany this, however a passenger ‘drop-off’ lane will be created parallel to Hartmann road, which reduces the need for this. Further aircraft parking space could be provided to the east of the facility by relocation of older buildings.
- 4.8 The Transco gas valve situated next to the Jet Centre building can be moved to create additional aircraft parking. The vehicle check-point (VCP) which is a demountable building designed for relocation, would move southeastwards from its current position to make way for the next stages of this development.

West End of the Site

- 4.9 An extension to the existing pier occurs to provide a gate 10. The ‘Ledger’ building (housing ground services and airline engineering functions) is removed, and replaced by a new building to the immediate west of the pier extension (with space for equipment storage underneath). Adjoining the Ground Services facility, building(s) to accommodate engineering and corporate maintenance facilities would be provided.
- 4.10 An aircraft hangar is provided. The fuel farm location remains as in the base case, but with the introduction of hydrant fuelling, the fuel dispensing area is initially merged with the fuel farm and then removed entirely. A ‘new’ fire station is provided to the west of the current location. A new vehicle checkpoint is provided to the south of the new fire station. The airside road is moved to the rear of the stands allowing a change to nose-in aircraft parking. The apron is ‘straightened’ at this western end allowing more aircraft parking space.

Aircraft Parking

- 4.11 The airside roadway on the main apron moves north of the aircraft parking stands. The parking configuration is changed to nose-in to facilitate handling.



‘Triangle’ Terminal Building

- 4.12 A western extension to the terminal building is created on land isolated by the DLR railway line.

Apron & Terminal

- 4.13 The terminal is extended eastwards (‘finger’ extension) and a deeper pier structure with integral lounges is provided to serve the aircraft stands on the eastern apron.

Commercial Property Development

- 4.14 Vacant land at the eastern end of the site currently on long-term lease to the Airport Group is scheduled for medium density development as part of the associated planning agreements, (shown as residential but could be mixed-use). ‘Social’ housing could be provided on land to the south of KGV DLR station and north of Newland Street.
- 4.15 The DLR is extended to Woolwich providing access to the development and onwards into the City, from south of the Thames.
- 4.16 The Royal Docks Management Authority also plans to have created a new water-ski club and ski tow course.

Albert Island (east of the runway)

- 4.17 As assumption is made that this piece of land can come into LCY ownership following negotiations with the London Development Agency already in progress. As most of this area is within the public safety zone of the airport, general, non-airport development is restricted.
- 4.18 The Fire Training Ground and facility are relocated at this time from the west end of the airfield to this Island and swing bridge controlled access is provided from the airfield for fire service use.

PHASE 3

Jet Centre

- 4.19 A further extension to the eastern end of the Jet Centre building of approximately a third occurs plus an extension of the ‘drop-off’ lane. Aircraft parking is expanded to the north of the runway’s approach lighting (‘North Apron’). This is provided following the relocation of the Fire training Ground in the previous phase.



West End

- 4.20 The fuel farm is removed completely to the eastern end of the airport site. The hangar facility is extended westwards (over the old fuel farm location) and extra apron space becomes available to the north of this hangar extension.

Apron & Terminal

- 4.21 The terminal is further extended eastward by infilling the dock between the dock edge and the pier. The pier is further extended eastwards to serve additional aircraft parking stands.

Aircraft Parking Stands

- 4.22 Up to 5 new stands, and taxi-lane running the length of runway to join with the runway 28-hold point, are constructed.

Surface Access & Support Facilities

- 4.23 The terminal forecourt area is extended eastwards over the current business car park. Provision is made for a multi-storey car park of up to seven storeys (approximately along half the length of car park as shown on base case). City Aviation House is extended by approximately 30m eastwards and 30m westwards. A dedicated facilities maintenance building is built to the east of the multi-storey car park. Car hire is also assumed to have relocated off site or provided for within the multi-storey car park.

Albert Island

- 4.24 With the phased introduction of hydrant fuelling, a pipe feed from a small barge-supplied terminal located on the Island replaces the fuel dispensing facility and storage farm at the western end of the site.
- 4.25 A combined heat and power (CHP) plant is provided to serve both the airport and the residential development.

PHASE 4

Terminal

- 4.26 The terminal is further extended eastwards along the southern portion of the apron previously built over the dock and absorbs the deep pier structure.
- 4.27 This allows the temporary closure of the original terminal so that the northern half can be removed along with the gate structures for gates 1 –3. This area is converted



London City Airport – Master Plan – Statement of Intent

to aircraft parking stands aligned with those built over the dock and allows for larger-sized aircraft to use stands 1-4.

- 4.28 As this work removes the Air Traffic Control tower from its current location, a new tower is built.

Passenger Access

- 4.29 With the increase in terminal capacity, modifications are made to extend the terminal drop-off zone and associated public transport facilities eastwards.

Aircraft Parking Stands

- 4.30 A further area of apron and pier is built for up to five aircraft stands. This adjoins the parallel taxi-lane built in the previous phase for access to the runway 28 hold.



5. **GOING FORWARD**

- 5.1 It is London City Airport's intention to work in 2005 on producing a full master plan following guidelines published by the Government and assessing in detail the core areas of safeguarding and land/property take, surface access initiatives, impact on people and the natural environment and proposals to minimise and mitigate impacts.
- 5.2 We intend to submit a master plan in line with the Government's guidelines by the end of the 2005.