

<p>IMPROVING SURFACE ACCESS TO AIRPORTS</p>
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What this paper is about

This paper provides background information on the responsibility of airport operators to bring forward proposals to up-grade or enhance the road, rail or transport network or services to support airport growth. It also provides an update on the former Government's initiatives to help encourage the greater use of public transport and low carbon strategies and the planning for the Olympic and Paralympic Games in 2012.

Where responses were received from UKACCs members concerning the progress made at individual airports these are reproduced in Annex 1. Details about the recent report comparing airport car parking charges at UK airports published by Which? are also given.

Points for Discussion

The paper is largely for information and it should be noted that the transport priorities of the new Government are not yet known.

Delegates may wish to discuss in more detail the progress made at airports in delivering public transport schemes and whether there are any issues concerning transport providers having differing priorities for investment on networks around airports.

Whether the Liaison Group should actively support the development of the high speed rail network and, if so, whether to register its interest with High Speed Two Ltd and the DfT - paragraph 24(n) refers.

Delegates are invited to comment on the results of the survey undertaken by Which? Comparing the price of airport car parking (paragraphs 42-45 refer).

Points for Possible Action

None, although issues may come to light at the Annual Meeting.

Introduction

1. The problems of securing good surface access links to airports, notably by public transport, remains an issue for many consultative committees. Throughout the UK the private car continues to be the dominant means of accessing airports, although some progress has been made at individual airports with public transport schemes and initiatives. The current financial climate and the downturn in demand for air travel has no doubt impacted on the number and scope of schemes being considered to support future airport growth.

Surface Access Schemes – Responsibilities of Airport Operators

2. All airports in England and Wales with more than 1,000 passenger air transport movements a year are required to set up an *Airport Transport Forum (ATF)* and prepare an *Airport Surface Access Strategy (ASAS)*. It is the responsibility of the airport operator to bring forward proposals for the strategy and to secure funding. The ASAS should set out short and long-term targets for decreasing the proportion of journeys to the airport by car and increasing the proportion by public transport, for both air passengers and airport workers. The Government has asked that existing surface access strategies be reviewed to reflect the conclusions of the *Air Transport White Paper (ATWP)* and the development proposals set out in *Airport Master Plans*.
3. Delegates will recall from previous meetings there has been general concern about the difficulties experienced by some airport operators in obtaining positive support and investment from all key stakeholders to ensure surface access schemes are delivered in a timely manner. There have been a number of new Government initiatives over the years which, if implemented, could help to secure a modal shift towards public transport at some airports.
4. Since last year's Annual Meeting, the DfT has commissioned Ipsos MORI to undertake research on the ATWP and airport master plans. There were two strands to the research study - assessing the strategic framework of the ATWP and understanding the development and use of airport master plans. The assessment of the strategic framework of the ATWP involved:
 - exploring perceptions of the ATWP as a framework for encouraging long-term sustainable development;
 - investigating how the ATWP has influenced airport development processes; and
 - understanding the value of this longer-term approach to policy making, including its strengths and limitations.
5. As regards the influence of ATWP policies on airport master plans it involved:
 - exploring how the policy and guidance in relation to airport master plans have been interpreted by airports;
 - illustrating how master plans have been developed and implemented by airports;
 - understanding the perceived value of master plans according to local stakeholders; and
 - investigating the barriers to implementing master plans.
6. Delegates will be interested to learn that the study revealed that respondents saw the value in working to a 30-year timeframe, but pointed to the challenges of needing to maintain the flexibility to respond to changing conditions and to ensure stakeholders had confidence in long-term forecasts. As regards the content of the ATWP the survey results revealed that respondents felt that it broadly covered the right issues, although there were some calls for greater coverage of the links between air transport and the rest of the UK's transport network (such as rail and road). The study identified a few gaps in coverage and the most commonly mentioned of these were issues in relation to surface access, a joined-up infrastructure network and environmental issues. Although it was acknowledged that these topics were included within the ATWP, it was felt they had not been covered in sufficient detail.
7. As regards Airport Master Plans the survey revealed mixed reactions to surface access targets and commitments included within Master Plans. In particular, there was a lack of consensus across local planning authority respondents around the viability of including these objectives within Master Plans - surface access targets and commitments were felt to be overly ambitious, or in some cases overly conservative. It was also felt that Master Plans in some cases only proposed limited investment into public transport services.

8. As expected, the study highlighted that linking an airport to other local transport networks was not directly within an airport operator's control and this was seen as an additional tension which made surface access a difficult issue to cover adequately within airport master plans. The Government has yet to respond to the study.

Progress made by the Government

9. Over recent years the Government has brought forward a number of new initiatives to help facilitate changes in transport choices. However, in view of the current financial climate and the change of Government, it is not clear what funding will be available to continue to promote and facilitate such changes. Since the last Annual Meeting initiatives that have come forward have focused on the need to address climate change and carbon reduction such as the Government's Carbon Reduction Strategy for Transport and the associated Delivery Plan¹.

The financial climate

10. Transport has enjoyed a 2.25% real-terms annual growth in funding throughout the current Comprehensive Spending Review period (2007-2011). However, in the current financial climate, it seems unlikely that this growth rate will be maintained beyond that period. In his December 2009 Pre-Budget Report, the former Chancellor noted that significant spending restraint would be required in subsequent years with public spending expected to grow by just 0.8% annually between 2011-2014 compared to a 1.5% real-terms annual growth between 2007-2011. The Pre-Budget Report brought forward certain planned capital investments to 2010/11, including investment to increase motorway capacity, in order to support economic growth and competitiveness.
11. The recent White Paper on High Speed Rail (discussed in more detail below) states unambiguously that, whilst existing programmes will seek to maximise capacity on the existing major road network, the former Government saw high-speed rail as the best way to increase capacity and reduce journey times on city-to-city travel. The new Government in its coalition document of 11th May, stated that as part of its programme of measures to fulfil the joint ambition for a low carbon and eco-friendly economy the desire to establish a high-speed rail network.
12. The announcement on high speed rail has been welcomed but it comes with a total price tag of up to £30 billion. There is a risk that savings will be made elsewhere on the transport budget to compensate. As construction is not expected to start until 2017, and to be phased over some 10 years, the former Government had implied that spending on high speed rail would not impact on other areas of transport investment in the short to medium term. However, it is possible that short-term spending reductions will be made to compensate for increased spending later.
13. It is accepted that difficult funding decisions will have to be made in the coming years, and the Government will no doubt wish to ensure that the safety and maintenance standards of the major road network are not compromised. As the Eddington study² demonstrated, transport infrastructure is critical to the generation of economic growth. It is therefore important that investment in, and maintenance of, basic infrastructure, such as the UK's major road and rail network, is not neglected to reduce costs.
14. Given the current financial climate and the new Government's commitment to significantly reduce spending rather than increase taxes, it is unlikely that Government investment will be forthcoming to support surface access schemes at airports particularly where there is potential for third party funding for such schemes. The budget cuts have already impacted on the Scottish Parliament as it was announced in September 2009 that the branch line element of the Glasgow Airport Rail Link project would be cancelled. Work on the main line between Glasgow Central and Paisley will however continue.

Britain's Transport Infrastructure: Motorways and Major Trunk Roads – January 2009

15. The November 2008 document, *Towards a Sustainable Transport System (TaSTS)*³, described the former Government's five goals for transport: supporting economic growth, tackling climate change, contributing to better safety, security and health, promoting equality of

¹ <http://www.ukaccs.info/low-carbon.pdf>

² <http://www.dft.gov.uk/about/strategy/transportstrategy/eddingtonstudy/>

³ <http://www.dft.gov.uk/about/strategy/transportstrategy/tasts/tastsletter>

opportunity and improving quality of life. The main focus of its programme for the national road network was supporting economic growth by reducing congestion and providing more reliable journeys for motorists and freight operators, but that would be done in a way that fits with the other four goals. The programme also included a commitment to improve access to transport networks from ports and airports along key corridors connecting major cities and areas of housing growth and support regional economies.

16. In January 2009 it was announced that the former Government planned to invest up to £6bn in major improvements to the strategic national road network and set out the schemes which were being considered for this funding. However it is not clear whether this included any schemes needed to support future airport growth.

*Delivering a Sustainable Transport System (DaSTS)*⁴

17. In October 2007 the DfT published *Towards a Sustainable Transport System* in response to the Eddington Study and the Stern review. It sets out the former Government's transport investment and policy plans to 2014 and longer term proposals beyond 2014, including Crossrail and Thameslink. The DfT published an update on progress in July 2008⁵.
18. In November 2008⁶ the Department for Transport published a paper on *Delivering a Sustainable Transport System*. The paper sets out five goals:
 - To support economic growth
 - To tackle climate change
 - To contribute to better safety security and health
 - To promote equality of opportunity
 - To improve quality of life by promoting a healthy natural environment
19. At the same time guidance⁷ to Regions on delivering a sustainable transport system was issued. This explains that a new approach to transport investment and policy requires the Department to look at its investment in transport across the piece to enable better decisions and ensure the totality of investment across the different networks. The process will help to align national and regional transport strategies.
20. The *DaSTS* identifies a national strategic infrastructure. Within this seven airports (Heathrow; Gatwick; Stansted; Manchester; Luton; Birmingham and East Midlands) and ten ports that make up the international gateway based on passenger movements and freight tonnage have been identified. The strategic national corridors that link these ports and airports with the largest urban areas have been mapped. The Government also confirmed its commitment to supporting the improvement of surface access to ports and airports and recognising it has a direct role in part-funding schemes to improve the delivery of the strategic national network. The DfT is progressing this area of work and has developed a programme of work to generate a range of options to improve the passenger and freight end-to-end journeys through international networks, and to maximise the contribution of international networks in facilitating UK economic growth.
21. This initiative, the International Networks Improvement Programme⁸ comprises seven projects:

Project	Description
Low Carbon Transport to Airports	Investigates how the uptake of low carbon transport methods to airports can be improved, making best use of existing capacity.
Access to Key Ports	To identify initiatives that will improve access to ports, and smooth flows into and out of ports, exploring technology, process, information sharing, and facilitation options.
Minimising the Impact of Security Processes/Streamlining Border Controls	Border and security controls are key processes in the end-to-end journey. The trend towards larger freight vessels and larger aeroplanes to accommodate increased demand within existing capacity requires processes of increased efficiency.

⁴ <http://www.dft.gov.uk/about/strategy/transportstrategy/dasts/dastsreport.pdf>

⁵ <http://www.dft.gov.uk/about/strategy/transportstrategy/tasts/tastsletter>

⁶ <http://www.dft.gov.uk/about/strategy/transportstrategy/hmtlsustaintranssys>

⁷ <http://www.dft.gov.uk/pgr/regional/strategy/dasts/funding-guidance.pdf>

⁸ <http://www.dft.gov.uk/about/strategy/transportstrategy/dasts/inip>

Improving end-to-end information provision	Looks at how to make better use of information across international networks to give passengers and freight transport organisations evidence to make informed choices and ease journeys.
Understanding Air Freight	Explores the economic and environmental impact of this important market sector
Indicators and Benchmarking	Seeks to measure how the UK compares to peer countries in terms of international network performance

These projects build upon the DfT's evidence base and prior analysis (the suite of end to end journey experience) to provide a better understanding of key challenges in stages across the end-to-end journey. These projects compliment the DfT studies on National Networks (NN) and Cities and Regional Networks (CRN)

22. The Department has also identified a small number of high value-for-money schemes which offer strong national and international productivity benefits and is prepared to contribute funding to secure delivery subject to support also from regional and local partners. There are four options being considered, one of which is the A555 relief road which would enhance access to Manchester Airport from the east. The other three options related to freight transportation. The Department will be discussing the co-funding opportunities for each of the schemes with partners.
23. Updates on the DaSTS studies for the Birmingham and Gatwick Diamond areas are given in the Birmingham and Gatwick contributions set out in Annex 1.

*High Speed Two*⁹

24. In January 2009, the former Government established *High Speed Two Ltd (HS2)* to consider the options for a new high speed rail network in Britain, starting with a costed and deliverable proposal for a new line from London to Birmingham.
25. HS2 Ltd's report was presented to the former Government at the end of December 2009¹⁰. The Government considered the report and on 11th March, 2010 published a Command Paper announcing its support for the development of a high speed rail network, subject to consultation, and setting out the next steps. Delegates will be please to note that the new Government is committed to establishing a high speed rail network.
26. The HS2 report and maps showing the recommended route between London and the West Midlands have been published by the DfT and are available on the DfT's website¹¹. A plan showing the High Speed network and the journey time savings to and from London is given at Annex 2.
27. The former Government's view was:
 - (a) That Britain's initial core high speed network should link London to Birmingham, Manchester, the East Midlands, Sheffield and Leeds, and be capable of carrying trains at up to 250 miles per hour. This Y-shaped network of around 335 miles (see indicative map at Annex 2) would bring the West Midlands within about half an hour of London, and deliver journey times of around 75 minutes from Leeds, Sheffield and Manchester to the capital. HS2 Ltd's work has shown that as a first step a high speed line from London to Birmingham would offer high value for money as the foundation for such a network, delivering more than £2 of benefits for every £1 spent;
 - (b) That the initial core 'Y' high speed network should include connections onto existing tracks, including the West and East Coast Main Lines, so that direct high speed train services can be operated from the outset to other cities including Glasgow, Edinburgh, Newcastle and Liverpool. Consideration should be given to extending the network subsequently to these and other major destinations to further improve capacity and connectivity;
 - (c) That the capacity released through transferring long-distance services to this network should be used to expand commuter, regional and freight services on existing lines, with

⁹ <http://www.dft.gov.uk/pgr/rail/pi/highspeedtwo/>

¹⁰ <http://www.dft.gov.uk/pgr/rail/pi/highspeedrail/hs2ltd/hs2report/?view=Standard>

¹¹ <http://www.dft.gov.uk/pgr/rail/pi/highspeedrail/hs2ltd/>

particular benefit for areas expected to see significant housing growth including Milton Keynes, Luton, Northampton, Peterborough, Kettering, Corby and Wellingborough;

- (d) That HS2 Ltd's recommended route for a London-Birmingham high speed line ('High Speed Two'), which would run from a rebuilt Euston station in London to a new Birmingham City Centre station at Curzon/Fazeley Street, is viable, subject to further work on reducing specific impacts on the local environment and communities.
- (e) That following completion of that further work, formal public consultation on the Government's proposals for high speed rail in the light of HS2 Ltd's recommended route for such a line should begin in the autumn;
- (f) That HS2 Ltd should now begin similar detailed planning work on the routes from Birmingham to Manchester and to Leeds, to be completed in summer 2011, with a view to consulting the public early in 2012;
- (g) That effective integration with London's current and planned transport networks is crucial, and that this is best delivered through the combination of a Euston terminus and a Crossrail Interchange station sited between Paddington and Heathrow, which would also provide a link to the Great Western Main Line;
- (h) That a second interchange station located to the south east of Birmingham would be of value in enhancing access to the high speed line for the West Midlands, and offer direct links to Birmingham Airport, the National Exhibition Centre and the M6 and M42. Such a station should be included in the core project, subject to an acceptable funding package being identified;
- (i) That high speed rail access to Heathrow is important, and should be provided from the outset through a fast and direct link of about 10 minutes via the Heathrow Express from the Crossrail Interchange station (more detail on the link to Heathrow is given in the Preservation of Slots for Domestic Services paper);
- (j) That the new British high speed rail network should be connected to the wider European high speed rail network via High Speed One and the Channel Tunnel, subject to cost and value for money. This could be achieved through either or both of a dedicated rapid transport system linking Euston and St Pancras and a direct rail link to High Speed One. HS2 Ltd will carry out further work to assess the viability and cost of each of these, including a full assessment of the business case, prior to any public consultation;
- (k) That powers to deliver this proposed high speed rail network should be secured by means of a single Hybrid Bill, to be introduced subject to public consultation, environmental impact assessment and further detailed work on funding and costs to feed into decisions to be taken in the next Spending Review. Depending on Parliamentary timescales and approval, this could allow construction to begin after the completion of London's Crossrail line, opening from 2017, with the high speed network opening in phases from 2026;
- (l) That HS2 Ltd's estimated £30 billion cost for a core high speed rail network linking London to Birmingham, Manchester and Leeds reflects its finding that construction costs for major projects in the UK are higher than for comparable projects elsewhere in Europe. In the light of this evidence, Infrastructure UK will work with the Department for Transport to consider whether and how civil engineering costs can be reduced, and further work on HS2 Ltd's cost estimates may be required following the completion of that work;
- (m) That the funding options for high speed rail should be further developed by the Government, taking particular account of the scope for securing third party contributions towards the cost of constructing new lines and stations;
- (n) That a strategy of this kind can only be developed and made a reality through active and open engagement with those who will be affected by or who are interested in it; and that, well before formal consultation starts in the autumn, HS2 Ltd should engage with local authorities and representative groups, including those representing key minorities, to ensure that the consultation can be as effective as possible.

28. HS2 Ltd was asked by the former Government to plan a full public consultation on the recommended route from London to the West Midlands, to start in Autumn 2010, and to start

work on potential route options for high speed lines from Birmingham to Manchester, and from Birmingham to Leeds, for consultation later.

29. The Secretariat will keep ACCs informed of progress and developments on this matter.

*The Rail White Paper*¹²

30. On 24 July 2007 the White Paper *Delivering a Sustainable Railway* was published. It looks at the potential future challenges for the railway over a 30 year horizon. The three long term issues for the Government and rail industry partnership being:
- increasing the capacity of the railway
 - delivering a quality service to passengers
 - fulfilling rail's environmental potential
31. At the end of March 2009 *Network Rail* issued their *Delivery Plan for Control Period Four (2009 – 2014)*¹³ this states that £8 billion is being invested to enhance the rail network and increase capacity and capability (this figure excludes schemes such as Crossrail).
32. The Delivery Plan also provides details of those Network Rail owned railway stations to receive investment for improvement over the next four years. Those airport railway stations earmarked are Edinburgh, Waverley, Glasgow Central, Birmingham Central and Gatwick.
33. The White Paper also stated that the Government would publish a rolling stock plan by January 2008, setting out in more detail how rolling stock would be used to deliver increased capacity (published 30th January 2008¹⁴). The main focus of this plan is on the steps that will need to be taken to enable the Train Operating Companies (TOCs) and Network Rail to deliver the additional capacity in the period 2009 to 2014 (otherwise known as Control Period 4 or CP4). However, this rolling stock plan also sets out the steps that the Government is taking to achieve the longer term aspirations for rail vehicles. The Government has already taken the first steps in delivering the next generation of rolling stock - the rolling stock will be lighter, more reliable and more energy efficient. Network Rail, through its leadership of the *Network Route Utilisation Strategy (RUS)* process, will take this work forward with the support of the cross-industry Technical Strategy Advisory Group.
34. The *Intercity Express Programme (IEP)*, *Thameslink* and *Crossrail* programmes are intended to take forward the next generation of rolling stock. These programmes are all now likely to proceed and each requires that a substantial number of new vehicles be delivered on to the network.

Better Rail Stations

35. On 17th November, 2009 the DfT published an independent report by the Station Champions, Chris Green and Sir Peter Hall, advising the Government on ways to improve stations, focussing on getting the basic facilities right as well as considering the broader role of stations in the future. The Executive Summary of the review is given at Annex 3. Delegates will note that ten 'B' stations have been identified for inclusion in imminent franchise tenders or for priority funding. No airport stations were included in that list.
36. The findings and recommendations of key interest to delegates are:
- Regional Hub B stations to be re-named National B Interchange Stations to better reflect the role of the majority of these important stations (airports included in the National B Interchange Stations category are: Birmingham International, Gatwick, Liverpool South Parkway, Luton, Manchester Airport and Stansted Airport. Only Bristol Temple Meads and Cardiff Central serving airports are in the National Hub A Stations category). The report states that National B Interchange stations tend to lie in the shadow of the high-earning 'A' stations and are under-invested for their daily role as major transport interchanges.
 - The suggestion that the Southern franchise be adopted as a template for the future with the Minimum Station Standards becoming the template for franchise tenders and agreements and the 'value' of incremental station investment over and above the Minimum Standards count as a positive benefit to the bidder.

¹² <http://www.dft.gov.uk/about/strategy/whitepapers/whitepapercm7176/>

¹³ <http://www.networkrail.co.uk/asp/5500.aspx>

¹⁴ <http://www.dft.gov.uk/pgr/rail/pi/rollingstock/rollingstockplan?page=1#a1000>

- The long term vision for rail/air super hubs. The general vision is for a range of super hub stations for the future - ranging from the giant Capital Super Hubs to local bus Rapid Transit stations. Rail/Air Super Hubs are also cited as an example. An increasing number of European cities have successfully integrated their airports into their national rail system providing seamless access to both their city centres and to all other parts of the country. The UK is lagging in this respect and the cancellation of the link to Glasgow Airport leaves it as the largest European airport without a rail connection. The report states the importance of the new high speed network taking full account of the need for speedy and simple air-rail connections.

37. The full report can be found on the DfT's website¹⁵
38. The former Government gave its initial response to the report and recognised that whilst the largest stations were generally up to the standard which passengers would expect, there were stations in the next tier – the major interchanges – which fell below the required standard and are in urgent need of attention. A commitment was given, together with Network Rail, to a rolling programme of improvements to major stations not within the current programme, and the then Secretary of State agreed with Network Rail to make up to £50m available to enable an early start to be made on the ten priority stations highlighted in the report.
39. The former Government consulted the industry (rail), the devolved administrations and local government stakeholders on the detailed implementation of the report's recommendations. As part of that consultation it asked *Passenger Focus* to consider whether any changes are required to the *National Passenger Survey* in order to enable passenger satisfaction to be measured in greater detail.
40. The former Government also intends to adopt, subject to consultation, the station standards set out in the report in respect of access (including enhanced cycle and car parking), information, facilities and environment and will seek to ensure that the standards are achieved within a reasonable timeframe through stipulating minimum standards in future franchise agreements.
41. As regards the future vision, the former Government welcomed the thoughtful and challenging ideas in the report, and said that it would consider the views of others on the future vision. The consultation closed on 29th January 2010.

Airport Car Parking

42. On 14th May, the consumer organisation Which?, published the results of a survey it had undertaken comparing car park prices at 15 of the UK's busiest airports, as well as charges for a range of other car parking options including park-and-ride facilities, parking tied in with a stay at a local hotel the night before a flight, or even valet services.
43. The Magazine, Which? Car, printed an article its Summer 2010 edition highlighting that it had been revealed that Heathrow's business car park was the most expensive option at £88.70. it reported that a spokeswoman for BAA Heathrow said: "BAA's car park rates start from £5.99 per day with no hidden credit card or booking fees and offer customers safe, secure and convenient parking nearest to the terminal."
44. Which? found that the cheapest option was Purple Parking's £19.84 park-and-ride facility at Manchester Airport. Also, Belfast International, Liverpool, and Bristol airports were found to offer among the cheapest on-site seven-day parking options at £23, £27.99 and £29 respectively. However, Southampton airport failed to impress Which? with a long-term Supersaver parking option priced at £45.90.
45. A copy of the article was circulated to delegates via the information service. Delegates are invited to comment on the findings of Which?

Olympic and Paralympic Games 2012 - Transport Plan

46. The Olympic Games and Paralympic Games have been described as a country's largest peacetime logistical operation and present London and the UK with a huge transport challenge. The hosting of the Games will result in a significant increase in passenger throughput at the main London airports but as there are other venues across the UK, it is likely that there will be an impact on some regional airports such as Glasgow, Manchester, Cardiff,

¹⁵ <http://www.dft.gov.uk/pgr/rail/passenger/stations/betterrailstations/pdf/report.pdf>

Birmingham and East Midlands (serving the football venues) and those serving the Olympic events at Weymouth and Portland (possibly Bournemouth, Exeter, and Bristol). The *Olympic Delivery Authority* (ODA) has developed a Transport Plan - the second edition was published in December 2009 - but it does not cover in any detail the surface transport needed to accommodate spectators travelling through regional airports.

47. London 2012 is aiming for 100% of spectators to access the Games by public transport, or by walking or cycling. The ODA is improving existing transport links and building new links where needed – across London and the UK and is also contributing to improvements already planned by a range of transport partners.
48. The rail network will have a significant role transporting not only UK spectators across the UK but also international spectators between events. The ODA has been working with passenger rail operators since 2004 which has resulted in rail franchise agreements having an Olympic clause included which sets out how train operating companies are expected to co-operate in the delivery and execution of service delivery plans for the Olympic Games and Paralympic Games. Where rail operators have a pre-2004 franchise agreement without the Olympic clause, the ODA and the Government will look to those operators to act as though they did.
49. A number of Games funded schemes have or will enhance the capability of the rail network, as will other rail schemes that are funded by other parties e.g. Thameslink, New Street Station Birmingham. Temporary rail enhancement schemes are also planned across the UK to accommodate the peaks of passenger demand generated by the Games.
50. The DfT has roles both in providing assurance that transport planning for the Games is affordable and fit for purpose, and in funding or delivering specific projects that form part of the ODA-led *Olympic Transport Plan*¹⁶. The Plan includes a number of infrastructure projects, such as the upgrades of the North London Line and Stratford regional station - the main gateway station to the Olympic Park, which will provide an important legacy benefit for London's transport system. Key contributions led by the Department in 2008-09 were the completion of the West Coast Main Line upgrade project in December 2008 and, in the same month, the launch of public consultation on designation of the Olympic Route Network (ORN) – a network of roads to provide safe, secure and reliable transport for athletes, officials and the media during the Games.
51. This year will be a significant one for Londoners as Transport for London delivers a number of key Games-related transport projects, including re-opening the extended East London Line, completion of the Jubilee Line upgrade, new London Overground trains entering service and the opening of the DLR extension to Stratford International Station.
52. Regarding aviation, DfT has commissioned a study to assess the ability of UK airports to handle projected Games-related traffic whilst minimising, as far as practicable, any disruption to airports and passengers. The study will consider demand estimates across all flight types (e.g. commercial, charter, private, State), evaluate available and potential airport capacity for handling this demand, including an analysis of constraints on capacity, and develop options for addressing any shortfall in capacity. The DfT, working with NATS and the CAA has hosted stakeholder events and more information on the planning for the Games and Paralympics is available on the DfT's website¹⁷. Delegates will note that the detail of any restrictions of airspace has yet to be determined in full but will influence the capacity/demand picture. There is a possibility that temporary restrictions on airspace may be imposed in order to protect Olympic venues for security reasons. This is of greatest concern to London City Airport – the closest airport to the Games venue. The DfT recognises the industry's concerns and has confirmed that the aim will be to minimise any adverse impact as far as possible. It is not yet known what and where restrictions may be imposed but the starting point would be to maintain business as usual.
53. It has already been identified that potentially the highest demand for arrival/departures at airports will be immediately after the Closing Ceremony. It has also been acknowledged that the Paralympic Games may pose additional pressures on existing airport systems.

¹⁶ <http://www.london2012.com/making-it-happen/transport/transport-plan.php>

¹⁷ <http://www.dft.gov.uk/adobe/pdf/165237/olympicgames/aviationstakeholderday.pdf>

Conclusion

54. It is encouraging that research undertaken by Ipsos MORI on the Air Transport White Paper and airport master plans has identified that surface access is a difficult issue to cover in airport master plans. It is hoped therefore that the Government reviews this important matter in the preparation of the Progress Report on the White Paper which is expected to be published in 2011 (at the same time as the consultation on the National Policy Statement for Aviation).
55. From the contributions received from member committees, it appears that good progress is being made at airports to improve the modal shift from the use of the private car to public transport. The Government has also made progress in bringing forward a range of initiatives and but there is uncertainty around the future funding in the nation's transport infrastructure due to the current financial climate. The proposed high speed rail project that will link Heathrow to the West Midlands initially and then, in the longer term, to other areas in north England and Scotland is to be welcomed. Although projects of this scale take many years to plan and construct, it could provide a number of regions with direct access to Heathrow enabling travellers to better interline with international air services.
56. Delegates are asked to share experiences at the meeting on whether their airports are experiencing problems in engaging with transport providers to bring forward schemes to support airport growth.

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May 2010

CURRENT POSITION AT AIRPORTS

(Note: The modal split figures have been provided by airports according to their own methods of calculation and accordingly they cannot be strictly compared as between one airport and another)

Aberdeen

The location of and predominantly rural catchment area for Aberdeen airport, and the relative lack of direct public transport links, requires that the vast majority of travellers arrive and depart by either taxi or private car. The airport management is seeking to reduce the impact of kiss and fly by encouraging parking (an additional 500 spaces in a new multi-storey car park about 30m from the main terminal entrance was opened in 2009), use of taxis (with pre-booking being promoted by the licensed operator), and use of public transport.

In December 2008, Scotrail extended many of its hourly express trains from Edinburgh and Glasgow beyond Aberdeen to include Dyce (the station closest to the airport) and the airport operator, the North East Scotland Transport agency (NESTRANS) and the Dyce Transport Management Organisation have subsidised a new 30 minute shuttle bus service from Dyce station to the airport and the adjoining business park. In addition, Stagecoach, the main operator of country bus services from Aberdeen, has increasingly included a stop at the airport terminal on its long distance buses from Inverness and Elgin to the north west, and from the rural towns and villages to the north west of Aberdeen, on their way to and from the city centre.

These improvements have encouraged some modal switch, but the fact that peak times for the airport are 0600 – 0730 for morning departures (with check-in open from 0400), and arrivals between 2030 and 2200, before and after the main public transport services are operating, still means that many passengers have no chance to opt to use public transport.

A meeting of the Airport Surface Access Working Group is scheduled just before the annual UKACCs' meeting, and any statistical information arising from that can be orally reported at the annual meeting.

Birmingham

The formal notice of Planning Approval for the Runway Extension was issued (by Solihull MBC, as Local Planning Authority) in November 2009 (dated 2 November 2010), together with 26 Planning Conditions and a S106 Agreement with 16 Schedules of Obligations, copies of which are available via the Airport Company's website¹⁸. Schedule 3 - Surface Access for the S106 Agreement (which is the longest of the 16 schedules) sets out the detailed obligations re surface access, including Public Transport Modal Share targets, whilst there are Planning Conditions re improvements for M42 Junction 6 (Planning Condition 19) and the preparation/submission of a detailed Travel Plan (Planning Condition 23).

The Runway Extension and Airport Surface Access is one of the nine Regional Transport Priorities for the West Midlands, and is second on the list of Regional Transport Priorities after the redevelopment of Birmingham New Street Station.

The Airport Company has been engaged in the Department for Transport's (DfT) "Delivering a Sustainable Transport System" (DaSTS) process, which identifies Birmingham International Airport (BIA) as a "key international gateway" and critical to the "national strategic transport network", i.e. "Strategic National Corridors and Strategic National Corridor Infrastructure" (including airports and access to airports). Locally, the Airport Company has been consulted on two studies emerging out of the DfT's DaSTS process, i.e. the "Coventry North – South Corridor Study" and the "Access to Birmingham Study", where the importance of the Airport's role in terms of access to air travel (for business, commerce and industry; inbound tourism; inward investment; and employment; and serving local/regional residents in terms of holidays abroad and visiting friends & relatives overseas) and the need for good surface access for the Airport is critical to both studies.

The Airport Company has been engaged in the DfT's (together with the AOA and other UK airports) "Low Carbon Transport to Airports" initiative, which included a DfT/AOA Workshop earlier in the year, where the objective of the Workshop was to consider :

- Airport Surface Access issues since the previous Workshop (in 2006).

¹⁸ <http://www.birminghamairport.co.uk/>

- What drives current Airport Surface Access behaviour.
- How to promote Airport Surface Access by Public Transport.
- How to promote Efficient Airport Surface Access by Private Transport.

Although the Workshop was themed “AOA/DfT Low Carbon Transport to Airports”, the importance of customer service and customer needs, surface access by car and income streams from car parking was emphasised, as well as recognising the need to improve surface access by Public Transport (both in terms of environmental issues and good customer service).

The Airport Company has been engaged in the DfT’s “International Networks Improvement Programme” initiative, which has identified seven projects for airports (as well as sea ports), i.e.

- Access to Key Ports.
- Low Carbon Transport to Airports.
- Minimising the Impact of Security Processes.
- Streamlining Border Controls.
- Improving End to End Information Provision.
- Understanding Air Freight.
- Indicators and Benchmarking.

The Airport Company has been engaged with the AOA (and the DfT and other UK airports) in considering “Passenger Terminal Forecourt Management”, where the key issues are :

- Current Passenger Terminal Forecourt Management.
- Congestion and Traffic Management.
- Set Down/Pick Up (including Kiss & Fly and Drop & Go).
- Off-Site Car Park operators.
- Coach operations.
- Traffic Regulation Orders and Enforcement.
- Balance between Customer Service and Security.
- Consistency of processes and potential Best Practice.

The DfT published the anticipated Command Paper on “High Speed Rail” on 11 March 2010. The Command Paper sets out the Government’s (pre General Election) policy for High Speed Rail, with a National Strategy for High Speed Rail, based on an initial core network between London and Birmingham, and extensions, thereafter, to Manchester and Leeds and, eventually, to Glasgow and Edinburgh (a “Y” shaped network). The Command Paper identifies a preferred route between London (with a terminus at Euston, as an expanded and rebuilt station) and Birmingham (with a new station terminus at Curzon Street, Eastside in Birmingham City Centre), via an interchange with Cross Rail (at Old Oak Common in London, for connections to Heathrow and the Great Western Line), the Chilterns, Warwickshire and an interchange station to include the Airport/NEC (“Birmingham Interchange”, on a site beyond the NEC between the M42/A452, with a “rapid transit link” to the Airport which would take “5 – 7 minutes”). The Government, subject to the General Election, propose a public consultation on the High Speed Rail route between London and Birmingham in Autumn 2010, with construction proposed to commence in 2017 and the new line proposed to open in 2026.

The full calendar year 2009 Public Transport Modal Shares for the Airport are:

- Passenger Public Transport Modal Share: 26.8% (highest ever recorded, with rail increasing its share).
- Employee Public Transport Modal Share: 23.4%.

A Visitor Information & Onward Travel Centre (located in the Millennium Link, and operated by Marketing Birmingham) was opened at BIA on 1 March 2010 (following the closure of the Airport Information Desk). The Onward Travel Centre will form an important part of the Airport’s programme for assisting passengers and visitors with onward travel planning and information on Airport surface access.

Work has commenced on Solihull MBC’s ANITA Scheme. The ANITA Scheme (Airport & NEC Integrated Transport Access) is a major scheme for Solihull MBC, forming a key part of its current transport strategy for Solihull, improving surface access by bus for BIA and NEC (where bus is best suited for use by staff, in terms of journeys to work), thus reducing congestion and improving surface access for BIA passengers and visitors and NEC visitors. The scheme was, originally, part of the West Midlands Local Transport Plan process (submitted as an “Annex E Scheme”), but became part

of the DfT's Regional Funding Allocation (RFA) process for the West Midlands, when the DfT transport funding processes were revised. The DfT confirmed the funding for the ANITA Scheme in 2009, where £11 million of DfT 'public sector' capital funding, to improve access to BIA and NEC, has levered in £1.5 million of private sector revenue support funding (i.e. BIA £1 million and NEC £0.5 million) to support a substantial improvement in local bus services (including extended hours of operation, improved frequencies and penetration of local employee catchment areas). The DfT funding is being used to provide :

- Enhanced Bus Facilities (including further development of the Multi Modal Interchange).
- Bus Priority Measures on the Public Highway.
- GPS and Selective Vehicle Detection for buses, to assist in providing Real Time Information.
- Real Time Information at Bus Stops, and at other locations such as the Airport (to enhance existing provision at landside and airside locations) and the Multi Modal Interchange.
- Variable Message Road Signs for local road users.
- Improvements to facilities for Cyclists/Pedestrians.

The Airport Company is reviewing its arrangements to provide passengers, visitors and employees with information on surface access for the Airport, to include a new Airport Website and more Real Time Information (including at airside and landside locations), where liaison with the Highways Agency, Local Highway Authorities, Network Rail and Bus, Coach and Rail operators will be important.

During 2009, the Airport Company completed the following schemes :

- New International Pier.
- Relocation of the Bus & Coach Terminus and Revisions to the Landside Road Network, to include the Drop & Go Area.
- Multi Storey Car Park 3 (now Short & Medium Stay Car Park 1) to provide a further 1,550 car parking spaces (i.e. Multi Storey Car Park 3/Short & Medium Stay 1 now provides 3,300 spaces).

The Highways Agency is now operating Active Traffic Management/Hard Shoulder Running on the M42 between Jncs 3A and 9; M40 between Jnc 16 and M42 Jnc 3 ; and M6 between Jncs 4 and 5. The Highways Agency is also introducing Active Traffic Management/Hard Shoulder Running between Jnc 8 – 10 A and Hard Shoulder Running for the M42 Slip Road at Jnc 5 (for the first time in terms of a motorway slip road in the UK).

The redevelopment of Birmingham New Street Station has commenced, which will be important in terms of rail access for the Airport for those passengers interchanging via New Street Station to Birmingham International Station (to include facilities for interchanging Airport/NEC passengers). The Airport Company, working with other partners, including the NEC, Centro, Network Rail and Virgin Trains, is also lobbying for improvements to the passenger environment/experience, customer service and wayfinding at Birmingham International Station, to match the redevelopment of Birmingham New Street Station, the Multi Modal Interchange and investments in improvements at the Airport and the NEC.

The process, by local authorities, to update their Local Transport Plans (i.e. the Local Transport Plan 3 process) has commenced, and the Airport Company is being engaged by :

- Centro/Cepog (Chief Engineers & Planning Officers Group) re the West Midlands LTP 3 process, to include a dedicated section on the Airport and Airport surface access issues.
- Warwickshire CC re the Warwickshire LTP 3 process, where access to the Airport is important/relevant in terms of transport policies for Warwickshire.

Following the recent Business Review (Project Blue/Project Horus), the Airport Company is still assessing some aspects of the way it undertakes its surface access work (to include the delivery of Airport surface access improvements and measures), together with its working relationships with key stakeholders. The current processes around the Airport Consultative Committee (and the Passenger Services & Surface Transport Working Group and Environment Working Group) are invaluable, together with the Airport Transport Forum process which is currently on hold, pending confirmation around issues arising out of the Planning Conditions/S106 Agreement Obligations re the Planning Approval for the Runway extension.

Bristol

Bristol International Flyer Update - The Airport's Flyer bus service remains the main source of public transport access to the Airport.

Passenger Numbers - There was a decline in passengers using the Flyer service in 2009. However, it is estimated that about 8.2% of air passengers used public transport for their journey to or from the Airport in 2009, compared with 7.7% in 2008, when the patronage of other services is taken into account.

Developments -

1. The new Online Booking System has proved extremely successful with year on year growth in bookings via this channel standing at 97% in the period April - September 2009.
2. A rail and Flyer ticket machine was installed in the Terminal Building in July 2009 and in excess of £10k of tickets had been sold as at November 2009.
3. Six new 37 seat, wheelchair accessible, low floored buses containing WiFi internet access, sockets for laptops and leather seats are due for delivery shortly and a further six vehicles will be purchase in 2011. The new vehicles will also deliver on improvements in fuel efficiency and emissions reductions.
4. Once the delivery of the new vehicles has taken place, the frequency of the Flyer service from the Airport to Temple Meads Railway Station will increase to every 10 minutes at peak times (from the current 15 minutes) increasing capacity and a modifieroute through Bristol will be introduced.
5. The Airport re-launched its Employee Travel Plan in March 2009 with the aim of reducing further the reliance of employees on travel to work by single occupancy car.

Surface Access Schemes - Initial consultation exercises on the West of England Partnership's major transport scheme proposals for the South Bristol Ring Road Link and Northern Fringe to Bristol Hengrove Ring Road Link were recently concluded. The provision of these two major links will greatly assist the flow of traffic to and from the Airport.

Bournemouth

As part of the £45 million redevelopment of the Airport, traffic lights will be installed at the entrance (funded by the Airport) to assist exit from the Airport, particularly at peak times. Airport-generated traffic accounts for only 18 - 20% of the peak hour flow.

East Midlands

EMA continues to invest substantial sums in improving public transport access to the Airport in pursuit of the Surface Access Strategy target of 30% of staff journeys to the Airport being by means other than private car by 2016.

The impact of the recession on passenger and employee numbers has made this more challenging but the strategy remains unchanged for the long term.

Edinburgh

We currently have a public transport mode of 28.7% of passengers which already exceeds the target of 27% by 2011 which the airport set itself in the 2007 Airport Surface access Strategy. Public Transport Mode share has increased steadily over recent years rising from 16% in 2002.

It is however possible that mode share will be affected in the short term by the temporary relocation of the bus stops in the coach park, required to facilitate the security works on the forecourt. We expect the bus stops to be back on the new improved forecourt by mid June.

Current initiatives include the installation in April 2010 of a rail ticket vending machine in the domestic arrivals area. We continue to work with TIE on the construction of the planned tram line on airport land and a tram halt next to the terminal. The airport has also facilitated the location of a promotional mock up tram at the airport over Summer 2010. The tram is expected to become operational in 2012.

The airport will also fund and construct new public transport interchange facilities on the A8 at Ratho Station .

This will improve facilities for passengers travelling to the airport from the West This and many other ongoing activities are funded from the BAA Edinburgh Public Transport Levy , charged on revenues from the short stay car parking at the airport.

Glasgow

The Glasgow Airport Rail Link---GARL---has been cancelled meantime by the Scottish Government due to financial restraints although some important preparatory work has been completed including new platforms at Glasgow Central Station. The decision to cancel has received strong criticism from all quarters.

However, bus services to and from the airport are extremely good and new routes are being introduced. The "Glasgow Flyer 500" goes direct via the M8 at to the Buchanan Bus Station in the city centre with a stop, if required, at Central And Queen St. rail stations thus giving air passengers access to all parts of the country. This service runs every 10 minutes during the day and 15 minutes in the evening and is extremely well used. Other bus routes serve the local area as well as places further afield making the airport extremely accessible by public transport. There is also a bus link to the nearby Paisley rail station. The taxi provision is excellent.

Access to the airport by car and taxi is very good and will be further enhanced when the M74 extension to the M8 is completed next year.

Although many people believe that car travel to the airport should be reduced for environmental reasons, this is not really practical unless GARL is, hopefully, eventually completed.

Glasgow Prestwick

Glasgow Prestwick Airport in conjunction with other stakeholders have been progressing the preparation of a GPA Surface Access Strategy. A stakeholder working group has now agreed a finalised draft of the Strategy document which will be put out for stakeholder and public consultation in Autumn 2010. One of the key actions of the Access Strategy will be the establishment of a Glasgow Prestwick Airport Transport Forum which will have a key responsibility to agree targets and monitor implementation.

Glasgow Prestwick is Scotland's only rail served airport which is reflected in the high level of rail based surface access:

Mode	2005	2009
Private Car	52.7%	44.8%
Rail	20.8%	33.2%
Hire Car	12.5%	6.8%
Taxi	5.2%	6.4%
Bus/Coach	3.6%	8.1%
Other	0.7%	0.7%

Source: CAA Passenger Surveys

Liverpool

The Airport continues to see increased numbers of passengers using public transport to travel to/from the Airport. Latest survey results show that in 2008 some 16.8% of all passengers used public transport, up from the 2005 survey figure of 10.4%. Importantly this latest figure not only beats the 2008 target figure of 12%, but also the 2011 target of 14%. Undoubtedly the opening of Liverpool South Parkway (LSP) in 2006 is having an impact on these figures. There have been no additional bus services in the past 12 months, but the Airport continues to work closely with Merseytravel and Merseyrail to promote the existing links and lobby operators for increased rail services to call at LSP and for additional bus and coach links with the Airport too.

Unfortunately whilst work on the business case and engineering aspects of the proposed Halton Chord project continues, uncertainties over funding means this fairly simple and relatively low cost project (in comparison to many larger rail initiatives) remains a number of years away at best.

London City

This year there have been no dramatic changes in the airport's public transport infrastructure. The last major development was the £300m extension of the Dockland Light Railway DLR to the airport

including a station built into the Airport's terminal. This opened for passengers in December 2005 and has proved a huge success with the Airport's passengers, staff and visitors. According to a December 2009 survey nearly half the Airport's passengers used to the DLR to arrive at the airport. The percentage of staff using the DLR is smaller because approximately three-quarters of staff working on site are shift workers and the DLR does not start early enough for those on the early shift.

The Airport continues to lobby for the DLR to provide a direct service from the Airport to Canary Wharf – at present DLR passengers from Canary Wharf have to change at Poplar. The Airport thinks a direct service might encourage more people to take the DLR instead of a taxi.

There is also a high quality shuttle bus for executives which links the Airport with Canary Wharf and Central London. The service uses low emissions people carriers and offers free Wi-fi for users. There are arrangements for users to share in the use of a minibus for a single fare.

In order to encourage the use of public transport services the charges for using the Airport's car parks have again been increased and this now represents a pretty expensive option. This has led a number of minicab drivers and chauffeurs to park in local streets while waiting for passengers they have come to pick-up. The police have helped in seeking to minimise this practice which has given rise to a certain amount of annoyance among local residents. If needs be the Council will introduce a controlled parking zone.

Here is the modal split for passengers according to the December 2009 survey:

- DLR – 49%
- Black Cab – 15%
- Minicab – 20%
- Chauffeur driven car – 3%
- Private car left in the Airport's car park – 4%
- Rented car left in the Airport's car park – 1%
- Private car driven away – 4%
- Other – including transfer passengers 4%

Interestingly although the Airport is well served by ordinary buses very few passengers use them because they do not serve the main passenger catchment areas of Canary Wharf and the Cities of London and Westminster.

London Gatwick

Gatwick Airport Limited's Surface Access Strategy (ASAS) published in 2007 outlined its approach to enhancing sustainable access to the airport and sets out targets to support this. Gatwick Airport has a Transport Forum with a Steering Group which comprises a wide range of airport stakeholders including regional, national and local authorities, airlines and airport based companies. This ensures that organisations with an interest in surface access to the airport are heard and enables many improvements to be carried out in partnership. The ASAS is supported by an Action Plan which was published in December 2009 which outlines the activities that the airport and its partners will be carrying out over the next three years.

The current target is for 40% of air passengers travelling to the airport by public transport by the time the airport reaches 40 mppa. During 2008, the CAA's passenger survey reported that 35.7% of air passengers (total non-transfer passengers 30.1 mppa in 2008) travelled to Gatwick by public transport so the airport is making good progress in meeting the 40% target. The rail network is the most important form of public transport access to Gatwick. This reflects the range of rail services that Gatwick has and its location on a major rail corridor. Gatwick is also the UK's busiest airport rail station. The figures are shown in the table below.

Mode of transport	Number of Air passengers (non transfer)	% of Air passengers
Rail	9,162,964	30.4
Bus and Coach	1,597,490	5.3

Total public transport	10,760,454	35.7
Private Car – dropped off	6,842,082	22.7
Private Car – parked	7,716,181	25.6
Taxi and Minicab	4,099,221	13.6
Hire cars	542,544	1.8
Other	180,848	0.6
Total	30,141,330	100

Source: CAA Passenger Survey Data 2008

Gatwick continues to develop solutions to support its targets and actively promotes onward travel products for air passengers within the airport's terminals.

Issues of concern to the Consultative Committee and Gatwick Airport Limited are predominantly in relation to the rail network and the Gatwick Express service. As reported at last year's Annual meeting, while the Committee welcomed the fact that the Gatwick Express service would be retained, it was most concerned about the decision to extend the service to the south coast at peak times to provide additional commuter capacity.

The extended Gatwick Express service came into operation in December 2008 and a number of problems have been experienced by both commuters and air passengers. Of greatest concern to the Gatwick Committee is that the express trains arriving from the south coast early in the morning arrive at Gatwick full leaving air passengers, who have paid for a premium service, with standing room only. In addition to this, the rolling stock used on the extended peak time service (Class 442 units) is not appropriate for use by air passengers, particularly as there are only single width external doors at each end of the carriage causing great difficulty for passengers with luggage to board and disembark the trains. The Committee is continuing to work with the train operating company and has made its views known to the Department. It is disappointing that the Class 442 rolling stock is to be increased and the use of the purpose built Class 460 units are to be phased out completely by 2011 when the lease on the rolling stock expires. Southern, the franchisee, has limited choice in the rolling stock available nationally and the Committee and other stakeholders are now in discussion with the Government to ensure that appropriate rolling stock, suitable to cater for air passenger needs is available for airport express services in the future.

Also of concern to the Committee is the Southern's franchise commitment (a DfT requirement) to move to a gated process at Gatwick by 2012. This is change the current ability for air passengers to purchase tickets on board the Express Service. The Committee is working closely with Gatwick Airport Limited and Southern to find a workable solution to this requirement.

As regards the Gatwick Station, after many years of lobbying and partnership work there is now the prospect of improvement to the railway station, albeit a much reduced scheme from that originally proposed. Network Rail is working on a detailed design in partnership with Gatwick Airport Limited and other key stakeholders. This scheme will hopefully be delivered by 2012, in time for the Olympics. The long term aspiration of Gatwick Airport Limited (and the Committee) is to develop Gatwick Station into a world class transport interchange facility.

The Committee has been kept up-to-date with the progress being made on Gatwick Diamond Delivering a Sustainable Transport System Study. The DfT has requested that the Regional Transport Board (being led by the South East England Partnership Board) consider a wide range of transport strategy and investment options in the context of the strategic goals for transport published in DaSTS (Delivering a Sustainable Transport System).

The aim of the Gatwick Diamond study is to identify ways in which the transport network and services can be modified, adapted and improved to meet the aspirations of the study area and address the strategic challenges it faces. The study has developed and assessed a range of options for the role of the transport system in responding to the high level challenges for the study area. It is a complex study looking at a range of interventions such as land use planning policy and skills and training initiatives to strategic transport management and policy. The study report is being finalised for consideration of the Regional Transport Board in June. If approved by DfT a further study stage may be carried out later in the year.

London Heathrow

The latest mode share figures for the airport showed that Q4/09 was 39.3%, made up of 11.9% bus, 18.1% Tube, 8.9% rail and 0.4% other. The MAT was 40.4%. This compared to 40.1% in 2008 and 38.4% in 2007. The area of concern was the marked drop in bus and coach use during Q4. At the Consultative Committee meeting it was agreed that the Bus Group would actively examine the data for possible causes.

There is continuing trend upwards in the use of sustainable transport, rising from 32.8% to 40.4%. There had been a significant decrease in car use by staff -

Mode Share:

single occupied car	61.4%
car-share	6.9%
bus	18.0%
tube	6.0%
cycle	0.9%

This meant that the target of reducing single car usage below 65% by 2012 had already been exceeded.

London Stansted

At London Stansted the public transport modal share now accounted for 49.6% (rail 26.1% and bus/coach 23.5%) of the people using the Airport. This was said during a meeting so there is nothing in writing to back this up.

The Airport has its own Transport Forum and this had its annual conference last November. These are well attended and well regarded events.

The fall in the number of passengers has relieved pressure on public transport and the road network. There are no rail or road building projects or extensions in the offing. New access roads off the M11 were built only a few years ago and can easily cater for current levels of demand.

The Airport is holding a trial whereby frequent users can use the short stay car park pick up area at a discounted rate (50% off). This is for private users only, not businesses or taxi firms.

Manchester

The 2008 Air Passenger Modal Share (21 million air passengers) was as follows:

Trains	8%
Buses	3%
Rental Car	2%
Parking Off Airport	14%
Parking On Airport	12%
Drop Off	32%
Taxi	29%

The 2008 Employee Modal Share was as follows:

Car alone	67%
Car Share	13%
Train	4%
Bus	9%
Cycle	2%
Motorbike	1%
Walk	2%
Taxi	1%

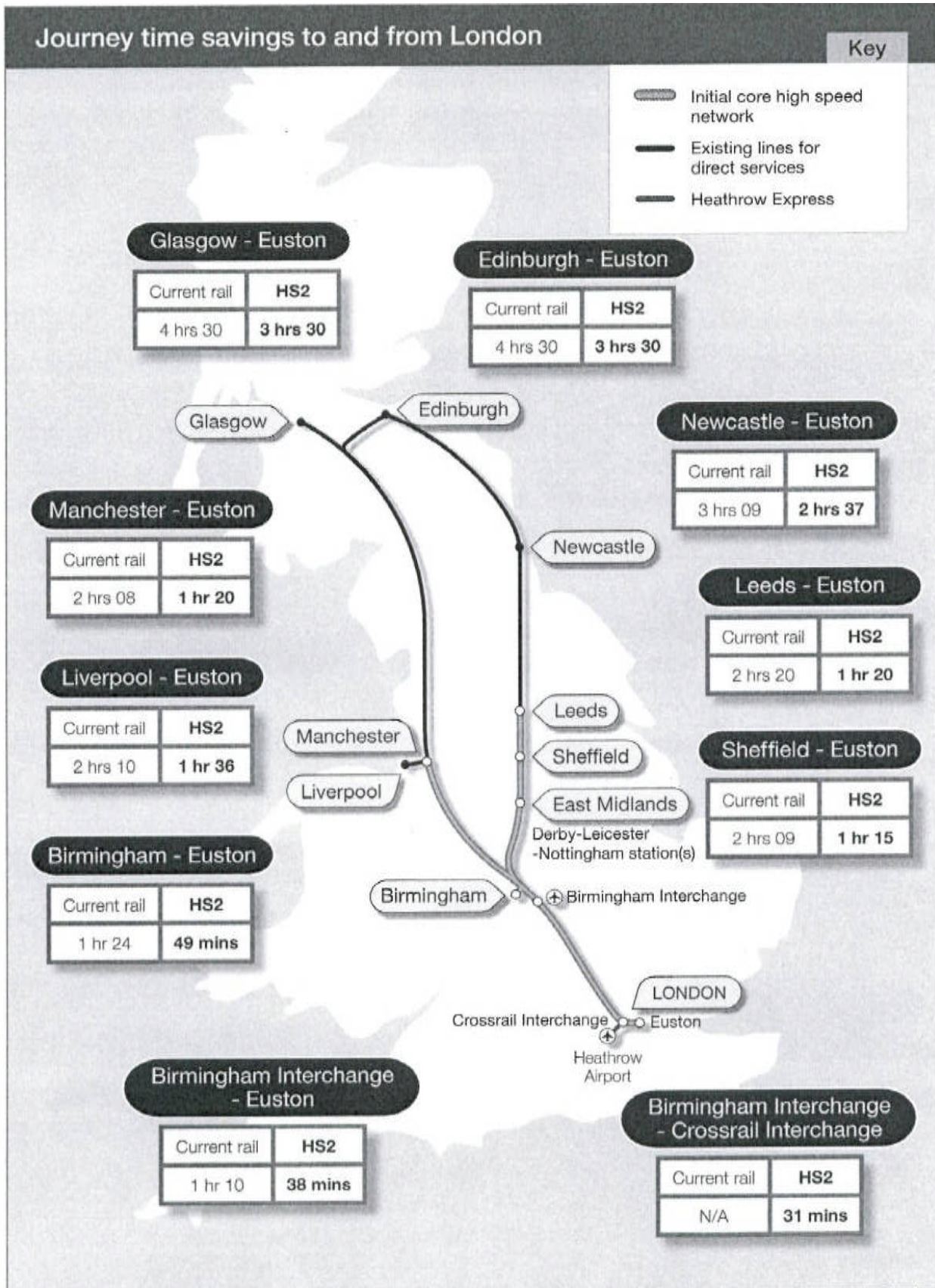
The Third Rail Platform at the Airport Station was officially opened on 8 January 2009. The extra platform has led to a reduction in train delays attributed to 'waiting for platform' and also a reduction in the number of cancelled trains. There are now 9 trains an hour to Manchester from the Airport. Arriva Trains Wales have extended some of their Llandudno/Chester services through to the Airport from Manchester Piccadilly.

Network Rail has published its report on the Manchester Hub Rail Study. The aim of the Study was to improve train connections to Manchester from destinations across the North, improve journey times between Manchester and Manchester Airport, Liverpool, Chester, Sheffield, Leeds, Hull and

the North East, and create a direct train route between Manchester Piccadilly and Victoria Stations. Included in the proposals was the building of a fourth platform at the Airport.

Funding has been agreed for the Metrolink extension from Chorlton to Manchester Airport. Design and advance work will begin in 2010 with passenger services to the airport expected to begin in 2016. Two Metrolink platforms have been included in the design of the Airport Station.

The Airport's Transport Forum held its Annual conference in November 2009 which was attended by 60 delegates. The theme of the meeting was a review of the Ground Transport Plan to ensure that the surface access aims, objectives and targets were consistent with wider regional and local policy and investment.



Only two thirds of customers are satisfied with Britain's stations. This is a mediocre result, and a demanding service industry should be seeking to lift this to at least the Overall Satisfaction level of 80%. The passenger's first priority is clearly the journey itself; but a smart, modern station is an important adjunct which can make or break the public transport experience.

The customer requirement is for easy access through a safe and pleasant station environment. The cause of the dissatisfaction is not face-to-face service -which is highly rated when provided -but the physical station facilities, which are only scored at 50% satisfaction. If stations are to be improved, the solution must lie in finding affordable ways of bringing their facilities and environment up to a consistent modern standard.

We recognise that additional funding will be very limited up to 2014 and we propose that the time is used to introduce minimum station standards into every new franchise and exploit all existing funding channels to prioritise the problem stations we have highlighted. Beyond 2014, we propose a ten year catch-up period for stations to bring them up to the standard of the modern train fleets.

We suggest that this two-part strategy is delivered in the following ways:

Key Recommendations

- A. We have developed detailed Minimum Station Standards for each station category and recommend that these should be made a mandatory requirement in all future franchise specifications to help to deliver an 80% station satisfaction.
- B. We find that the National 'B' Interchange stations are not adequately funded to meet the Minimum Standards and represent the biggest 'gap' in station consistency. We have reviewed this group in detail and recommend the top ten priority stations for priority funding through imminent franchise tenders, supplemented by a new 'Challenge Fund'.
- C. We recommend that the current spending rate on station upkeep and improvement should be stepped up by 25% for the ten years 2014 – 24 to approx £800m per annum to catch up on the backlog of nineteenth century buildings awaiting upgrading. Total station funding is running at approx £600m per annum for the current five year plan, but this is only sufficient to hold most stations at their current condition.
- D. The access to stations is becoming an obstacle to further rail growth and we recommend the creation of 5,000 cycle spaces per annum, together with 10,000 additional car parking spaces per annum. The car parking should be self-funding over the life of the assets.
- E. Rail stations cannot be planned in isolation and should be developed as transport hubs in close cooperation with local authorities, PTEs, Transport Authorities and Local Planning Authorities. The 'Manual for Streets' should be revised at an early date to offer better access to stations for pedestrians, cyclists and public transport.

Detailed Recommendations

Consistent Standards

The rail industry should aspire to achieve an 80% Station Satisfaction score over the next five years that matches the existing 'Overall' Satisfaction rating

The station priorities should be focused on improving Access, Information, Facilities and Environment in future franchises

The National Passenger Survey should provide a more detailed breakdown of 'Station Facilities' to help drive improvements

The existing six station categories are fit for purpose and should be retained as amended in Annex C. They should be owned and updated annually by Network Rail as landlord and all train companies should adopt the same six categories henceforth for consistency

The 'B' category of stations should be re-titled National 'B' Interchanges to focus attention on their core role. The 'C' and 'F' categories should be sub-divided to create more flexibility, as proposed in Annex C

The proposed Minimum Standards in Figure 8 should be adopted for each station category and these should be owned by the DfT as the franchise specifier and reviewed with each five year plan

Station name signs should use henceforth the standard format proposed, to avoid expensive re-branding when franchises change ownership

Minimum Station Standards should become mandatory in all future franchise tenders, to deliver a more consistent station experience and should be published as a public document and reviewed before each five year plan

The Minimum Station Standards, together with the 80% Station Satisfaction targets, should become franchise KPIs and should include firm commitments to year-by-year incremental improvements

10. The KPIs should be self-audited by the operators using third party evidence, and the DfT should commission occasional process audits. Penalties should be paid as additional investment in stations

Funding the 'Gaps'

The 'A' stations are adequately funded to deliver the Standards, but special action is needed at London Waterloo, where the DfT and Network Rail should take the lead in bringing the various partners together to create an agreed master plan with staged outputs over the next ten years

The 'B' stations are inadequately funded to deliver the Standards and represent the prime 'gap' in consistency. Ten 'B' stations have been identified for inclusion in imminent franchise tenders or for priority funding

The 'C' to 'F' stations should be progressively brought up to minimum standards through franchise tenders. Additional catch-up should be provided beyond the current five year funding by extending both the National Stations Improvement Programme (NSIP) and Access for All funding beyond 2014

This extended NSIP-2 funding beyond 2014 should include a one-off initiative to remove redundant buildings and to upgrade the remaining station facilities

Better Access

Station car park investment should be minimised in inner city areas with good public transport and cycling access. Investment in Station Travel Plans should be focused on other areas where demand indicates that an additional 10,000 spaces per annum should be created over the next ten years on a self-funding basis. Longer term parking plans should be reviewed in the RUS Stations Study

Certainty of parking should be offered through a new 'Premium Parking' scheme which would allow passengers to reserve a space at railhead car parks in advance, for both long distance and commuting journeys

Cycle access should be targeted to double at individual stations over the next five years – with a national target of 5% of passengers cycling to stations. This should be achieved through the specification of secure storage and extension of the cycle hub concept in future franchises, and through joint initiatives with local authorities to create segregated cycle routes. These initiatives should be reviewed after two years of experience.

Public transport access should be improved through a closer partnership with local authorities and bus operators, to encourage the re-location of bus stations closer to railway stations and to provide seamless bus/rail ticketing. PlusBus should be accepted by all bus, tram and PTE operators and City Shuttle services should be encouraged at all main stations.

Taxi access from large stations should be accelerated by adopting the Singapore Airport use of 'loading islands' where space can be made available

Disabled access is required for all train fleets by 2020, and Britain should match this EU directive by also making all 'A' to 'D' stations accessible by the same date. This will require the Access for All funding to be extended by a further five years. There should also be one telephone number for 'Assisted Travellers' to ring.

Customer security concerns at the smaller stations should be met through the measures in the Minimum Station Standards, supported by a policy of creating more community activity on stations

Better Management

A strategy should be developed to capture a potential 60% increase in station trading worth up to £44m pa at 'A' – 'C' stations. This should help to fund station improvements, and the industry's

forthcoming Route Utilisation Strategy (RUS) Stations Study could usefully address these opportunities in more detail

Train companies are encouraged to experiment more widely with joint Ticket-and-Shop' convenience stores, where the retailer sells rail tickets at the check out

Funding beyond 2014 should recognise that the current rate of investment is inadequate to convert the large stock of Victorian stations into modern stations that match the new train fleets. NSIP-2 and NSIP-3 'catch-up' programmes will be needed beyond the Minimum Standards, backed by a 25% step-up in the current rate of station investment for the ten years 2014-24

The forthcoming Route Utilisation Study consultation into Stations should be used to follow through the long-term upgrading and funding of station facilities and to identify the detailed priorities in each category in time for the 2012 funding discussions (HLOS)

A detailed study should be commissioned to identify the wider social-economic benefits for better stations in time to influence the next five-year funding discussions

The 2009 Southern Franchise Agreement should be adopted as the template for the future and the relevant proposals in this review should be incorporated into this model

Network Rail should take the lead in presenting the rail industry with a comprehensive plan within two months for further improving the management of stations across the industry. The issues addressed in the plan should include: a) Making station upgrades easier b) Making station upgrades cheaper c) Creating more responsive regional property teams d) Reviewing the role and operations of Managed Stations

Long Term Vision

The DfT, in cooperation with Communities and Local Government, should revise the 'Manual for Streets' with a new chapter on planning for integrated networks of urban streets around stations, prioritising pedestrians, cyclists and public transport. The rail industry, transport authorities and local planning authorities should cooperate in revising Local Development Frameworks to include such integrated street networks with urgency

The large stations should become the Hubs and Super Hubs for transport activities in their area. They should become the natural place to locate bus/tram stations which could also include Bus Rapid Transit routes to outer interchange stations incorporating local bus feeder services, cycle storage and Park & Ride car parks at the edge of towns

The medium and small stations should evolve into community hubs, providing local services such as small supermarkets, collection points for undelivered mail, sub post-offices and community services

The Super Hub stations should become the focus for large-scale mixed-use developments. Planning these developments should begin now, ready for the opportunities that will arise as the economy grows again

Conclusions

This Review seeks to point the way to better station facilities for a growing rail demand over future decades. We would hope that the Department for Transport and the rail industry will take this work forward to ensure that it culminates in a programme of improved station facilities for customers, supported by a clear partnership with local planning authorities to provide better long-term transport interchanges