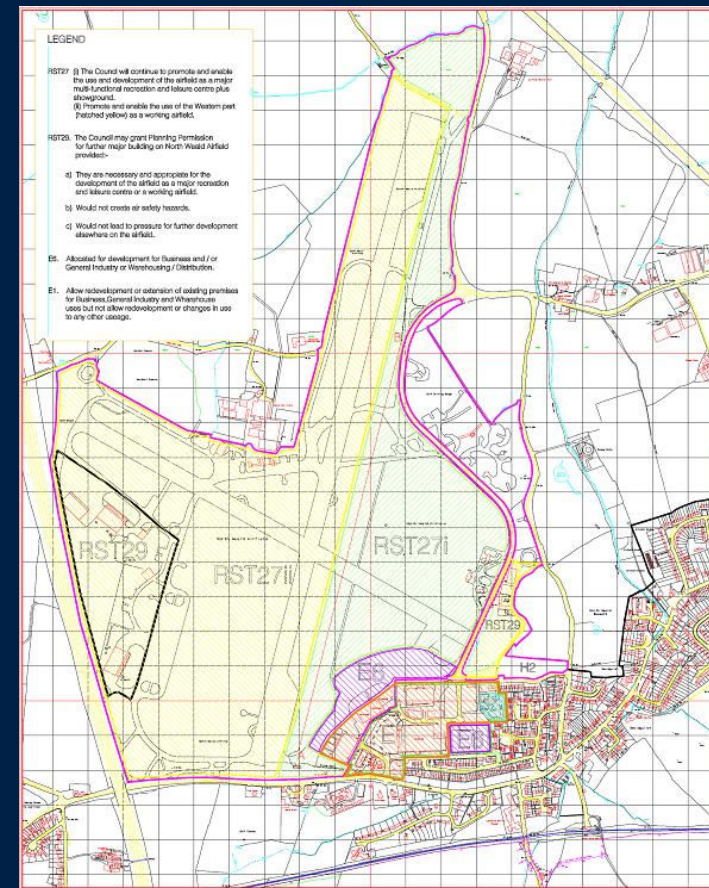


# Halcrow Group Limited

## North Weald Aviation Intensification Options

### Interim Report

### 8 November 2010



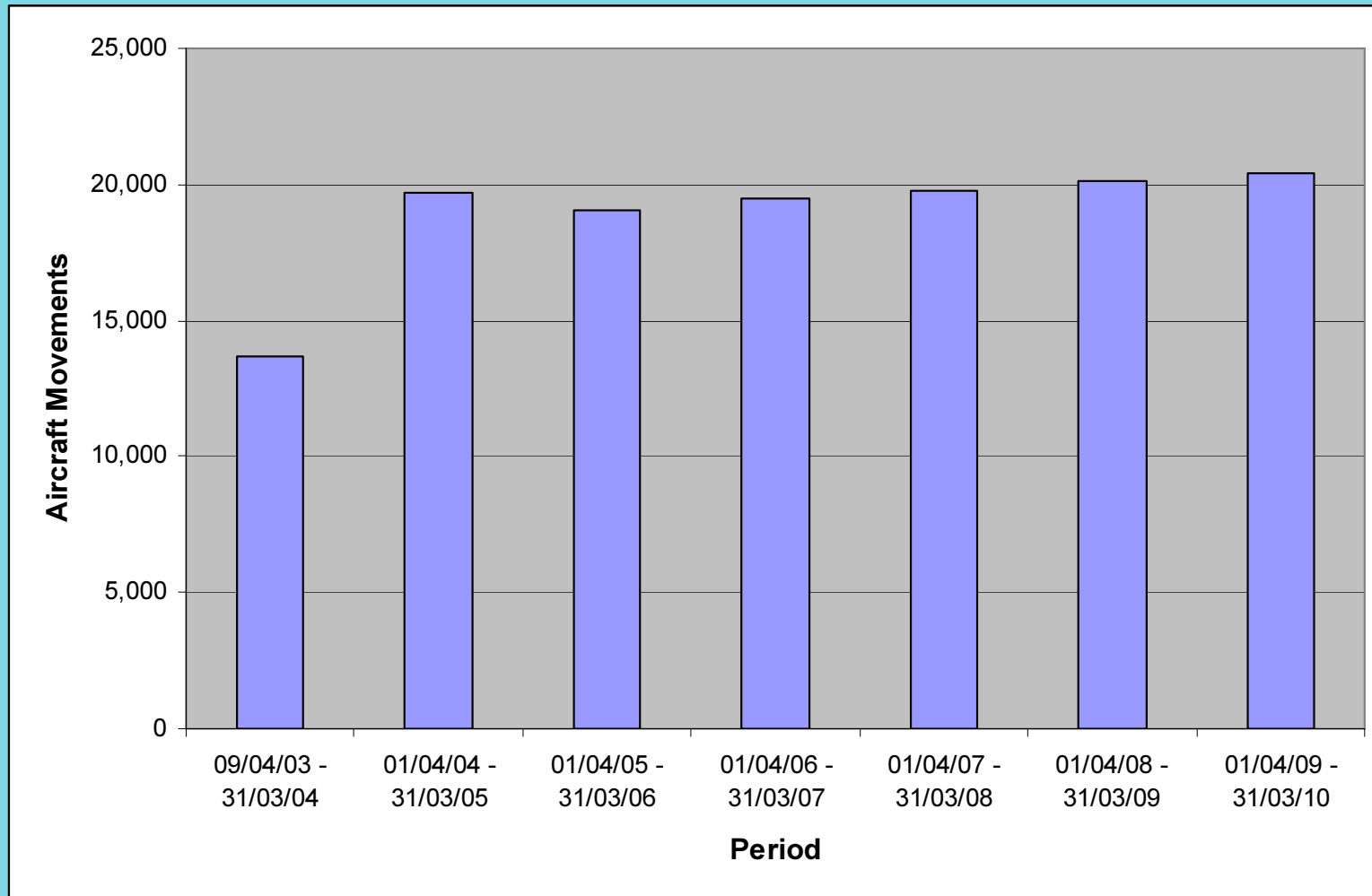
# Content

- Objectives
- North Weald Aerodrome today
- Market studies
- Facility requirements, development constraints
- Aerodrome licensing and related issues
- Consultations
- Next steps

# Scope

- Assess the potential for increased aviation activity
- Examine existing cost/revenue structure
- Protect existing activities and heritage features
- Target markets, potential revenues
- Facilities required, costs, development constraints
- Aerodrome licensing, pros and cons
- Review safety and security
- Assess local impacts
- Stakeholder consultation

# North Weald flying activity



## Some comparisons:

- **North Weald:**
  - 20,000 movements, mainly light sport, heritage aircraft
- **Farnborough:**
  - 23,000 corporate and private charter
- **Biggin Hill:**
  - 16,000 corporate and private charter
  - 38,000 aero club
- **Luton:**
  - 15,000 business movements
- **Stansted:**
  - 6,500 business movements
- **London City:**
  - 7,000 private charter movements

# NWA financial position 2009-10

## Tenants

- Aviation related           7
- Non-aviation               11
- plus other users

## Revenues

- Saturday markets       64%
- Rents etc                 35%

<b>Cost</b>	<b>2009/10</b>
Employees	357,356
Premises	242,170
Transport	16,601
Supplies & Services	66,063
Third Party Payments	988
Support Services	179,291
Capital	11,939
<b>Total Expenditure</b>	<b>874,408</b>
<b>Total Income</b>	<b>1,326,669</b>
<b>Net Operating Profit</b>	<b>452,261</b>

# Market studies

## Target markets

- Business aviation; corporate and fractional ownership
- Air taxi (private charter)
- Private operators
- Aviation related activity:
  - hangarage
  - aircraft and systems maintenance
  - aircraft sales
  - vocational training

# Indicative Aircraft Types



**Hawker Beechcraft King Air 200**

2 crew + 7/9 pax



**Pilatus PC-12**

2 crew + 6/8 pax



**Piper Navajo Chieftain**

2 crew + 8/10 pax



# Indicative Aircraft Types



**Cessna Citation Mustang**

2 crew + 4 pax



**Hawker Beechcraft Premier IA**

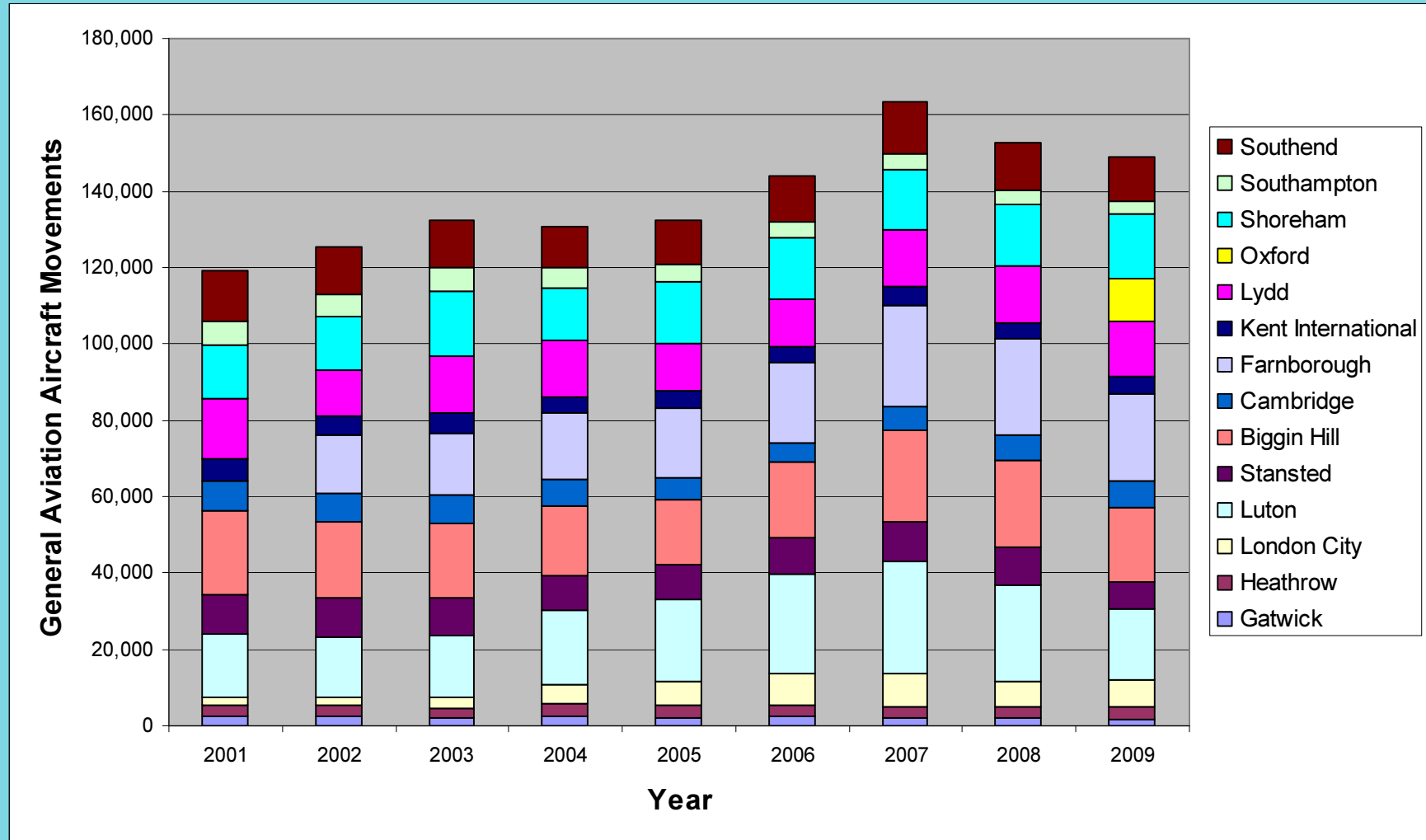
2 crew + 6 pax



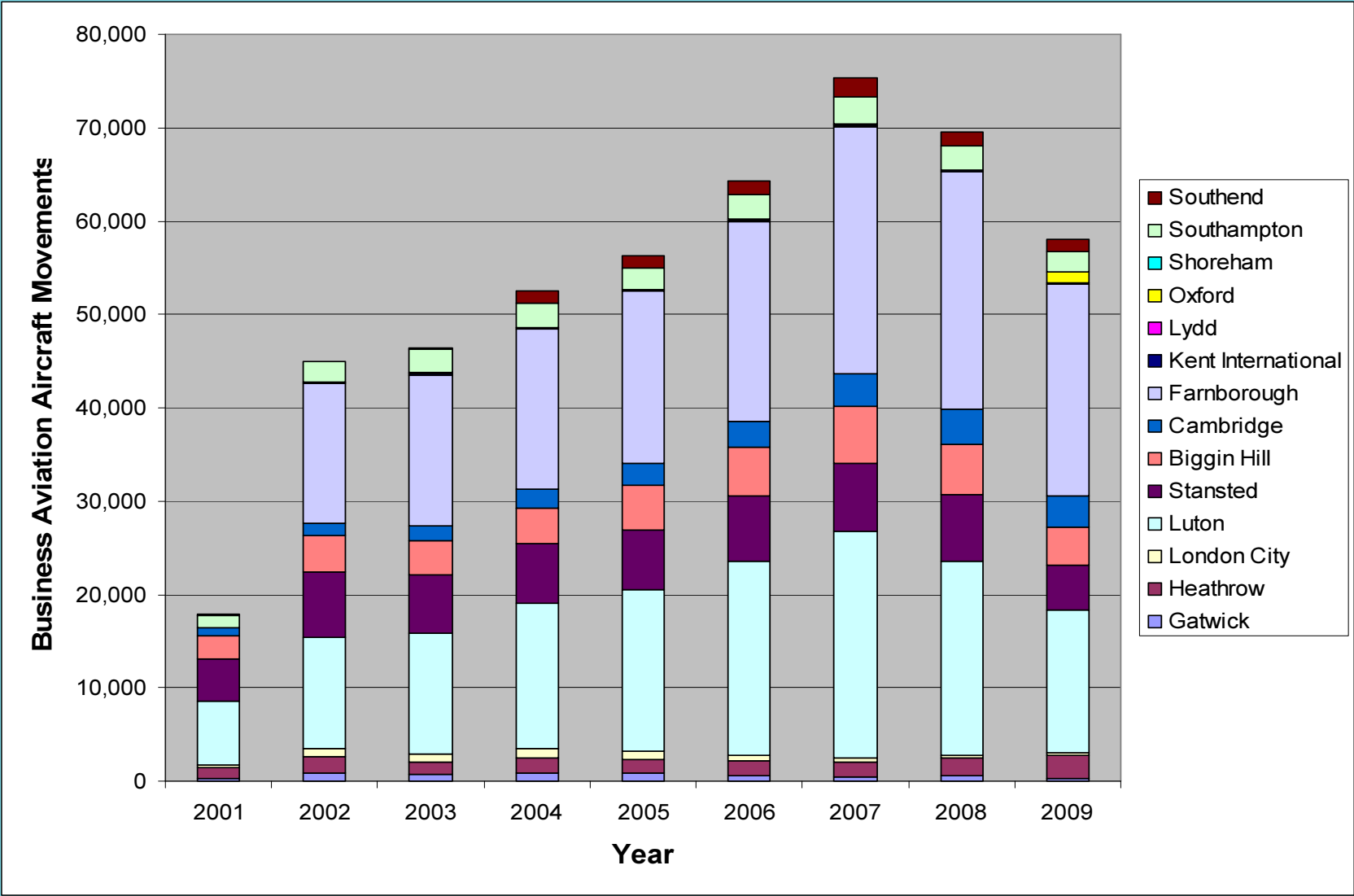
**Embraer Phenom 100**

2 crew + 4/6 pax

# Market trends – overall GA market



# SE England – Business Aviation Market



# Business Aviation Market

## Features

- Historical growth
- Recent downturn
- Capacity constraints at major airports
  - Heathrow, Gatwick - no capacity
  - Stansted, Luton - peak period capacity
- Environmental and planning constraints
  - Limits at Farnborough, Biggin Hill
  - Airspace limits at Northolt

# Development

## Attracting new users:

- Location; access times to business areas
- Reliability of access; airfield lighting, navigational aids
- Safety, licensed aerodrome?
- Terminal facilities
- Hangarage, maintenance
- Security

# North Weald – London Market Access

## Drive Times (Minutes)

Origin/Destination	North Weald	SEN	STN	LTN	LCY	LHR	LGW	NHT	BQH	FAB
Liverpool Street	50	73	64	64	25	59	68	48	61	81
Canary Wharf	47	67	61	73	20	69	73	57	58	91
Westminster	59	82	73	64	34	51	63	45	60	74
Tottenham Court Rd	58	82	72	61	34	49	69	42	66	72
South Kensington	76	98	89	72	51	47	71	46	70	70
Stratford	42	68	56	71	18	70	74	58	59	92

**Key:** SEN = Southend, STN = Stansted, LTN = Luton, LCY = London City, LHR = Heathrow, LGW = Gatwick, NHT = Northolt, BQH = Biggin Hill, FAB = Farnborough

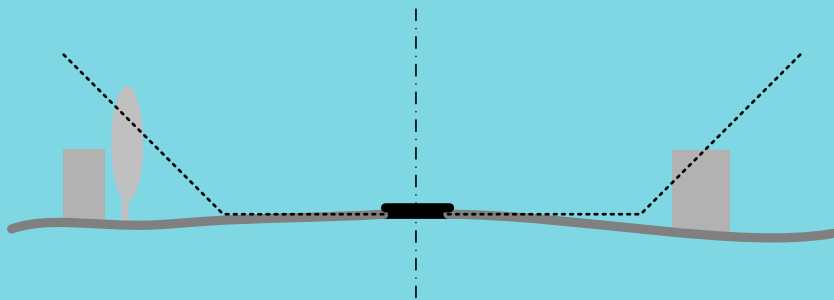
- shortest drive time
- 2nd shortest
- 3rd shortest

# Aerodrome licensing

- Pros and cons
  - Safety standards
  - Market attraction
  - Capital and operating costs
  - More regulation
- Options and constraints
  - Runway length, navigational aids
  - Higher capability/higher cost
- Airspace
  - Airways access, Stansted constraints
- Runway pavements
  - Life, safety, cost

# Aerodrome licensing

- Runway length
- Navigational aids
- Strip width
- Obstacles





# Safety and security

- Non-aviation uses on west side
- Access crosses runway end
- Limited access control
- Risk of runway incursion
- Out of hours security
- Public safety during markets



# Consultations

## Tenants and users

- North Weald Flying Services
- Weald Aviation
- North Weald Airfield Users Group
- Mr David Young

## Main concerns/comments

- Preservation of existing aviation uses, access, terms
- Preservation of heritage features and flying activity
- More effective use of asset
- Improved security, land use

# Consultations

## Local groups

- North Weald Parish Council (including District Councillors)
- Theydon Bois Action Group
- Residents Associations of North Weald, Thornwood and Hastingwood
- North Weald Aviation Heritage (Mr Arthur Moreton)
- Mr Howard Parkinson of Foskett, Marr, Gadsby & Head Solicitors (legal representative for companies based at North Weald Airfield, and some residents groups)
- Telephone/e-mail correspondence with Epping Residents Group, Waltham Abbey Residents Association, Corporation of London

## Main concerns/comments

- Preservation of heritage features and activity
- Preservation of open space, appearance, no large-scale development
- Prevention of 'inappropriate' land uses
- Aircraft noise, road traffic

# Next steps

- Consult Directorate of Airspace Policy/NATS
- Discussion with operators
- Allocation of costs and revenues
- Pavement inspection
- Costing of options
- Assessment of local impacts
- Business strategy