AIR FORUM
2.00 PM WEDNESDAY 24TH AUGUST 2016
MIDLOTHIAN SUITE, LOTHIAN CHAMBERS
59-63 GEORGE IV BRIDGE, EDINBURGH EH1 1RN

AGENDA

1. Welcome and Introduction;

2. Minutes of 19th May 2015 Air Forum (Minutes attached)

3. SEStran RTS 2015-2025 Refresh (AS) and SESplan Strategic Development Plan (IA)

    Items 4, 5, 6, 7a and 8 will be covered in part through presentation(s) by Edinburgh Airport

4. Air Connectivity at Edinburgh airport

5. Air Traffic Growth

6. Air terminal developments

7. Surface Access Strategy;
    a. Current position and Issues
    b. Surface Access Discussion Paper (TH) (Discussion Paper Attached)

8. Long Term Strategy for the Airport; New Airport Masterplan Update

9. AOCB

10. Date of future meeting

Trond Haugen
15 August 2016

SESTRAN AIR FORUM

10:00AM FRIDAY 29TH MAY 2015

DEAN OF GUILD ROOM, CITY CHAMBERS, EDINBURGH, EH1 1YJ

Present

Barry Turner (Chair)	Non Cllr Member
Cllr Donald Balsillie	Clackmannanshire Council
Cllr Jim Bryant	Midlothian Council
Cllr Ian Chisholm	Fife Council
Cllr Tom Coleman	Falkirk Council
Cllr Gordon Edgar	Scottish Borders Council
Cllr Bill Henderson	City of Edinburgh Council
Cllr Russell Imrie	Midlothian Council
Cllr Michael Veitch	East Lothian Council
Michael Cairns	Tactran
Kyle Drummond	City of Edinburgh Council
Jane Findlay	Fife Council
Lisa Freeman	SEStran
Trond Haugen	SEStran
Rachel Keys	Edinburgh Airport
Douglas King	Stagecoach
Alex Macaulay	SEStran
Graeme Marsden	SESplan
John Martin	Non Cllr Member
Kevin Murphy	Edinburgh Airport
Martin Ritchie	Transport Scotland
Sandy Scotland	Non Cllr Member
John Scott	First Scotland East
Emily Whitters	SEStran
Gareth Williams	SCDI

Apologies

Cllr Tony Boyle	West Lothian Council
Cllr Nick Cook	City of Edinburgh Council
Cllr Lesley Hinds	City of Edinburgh Council
Cllr Adam McVey	City of Edinburgh Council
Cllr Joanna Mowat	City of Edinburgh Council
Charlie Anderson	Non Cllr Member
Graham Bell	Non Cllr Member
Sarah Boyd	Lothian Buses
Julie Cole	Falkirk Council
John Jack	Non Cllr Member
Kieran Jackson	COSLA
Amber Moss	East Lothian Council
Derick Murray	Nestrans
Ranald Robertson	Hitrans
Harry Thomson	Swestrans
Martin Wanless	Scottish Borders Council

Mac West   Clackmannanshire Council
Iain Wilson   Scotrail

Ref		Actions
1.	**Welcome and Introduction; background to the SEStran Air Forum**	
	Mr Turner welcomed the group and conducted round table introductions. Mr Murphy noted that DHL and TNT send their apologies for the meeting. Mr Haugen gave a brief background to the forming of the Air Forum. SEStran had previously had a relationship with the airport during the airport surface strategy and airport masterplan strategy but the previous forum had ceased. Following a liaison group meeting it was decided to evolve the group in to a forum.	
2.	**Draft Remit/Terms of Reference**	
	Mr Haugen summarised the draft remit that was circulated with the agenda with main points as follows: • SEStran has been increasingly involved in freight and would like to include air freight in this. • Local authorities and SEStran currently have a strong involvement with the Surface Access Strategy and this is set to continue. • The last airport masterplan was in July 2011 and will be due for a refresh soon. Therefore now is an opportune time to discuss what should be included. • There will also be an airport liaison group but this will focus on specific individual issues where the forum will be further reaching and more strategic. Cllr Balsillie questioned why other airports were not included in the forum. Mr Macaulay stated that as the airports are in direct competition with Edinburgh airport then it was not in the groups interest to have them in attendance. Cllr Chisholm requested that Glenrothes Airport could have a role at the forum. Mr Macaulay agreed that the secretariat would write to Glenrothes airport as there would not be the same commercial friction.	Mr Haugen
3.	**Air Connectivity at Edinburgh Airport**	
	Mr Turner introduced the topic of air connectivity at Edinburgh Airport with key issues including: • What are the opportunities for introducing more long distance flights • What can be done to avoid the need for local people to travel further to reach destinations not available locally. Mr Haugen questioned if charter flights had a future at Edinburgh Airport. Mr Murphy confirmed charter flights are being targeted as part of the business plan. Mr Murphy outlined some figures on current connectivity at the airport: • In the last 3-4 years Edinburgh have more than doubled the number of long haul flights. • There are now have 3 destinations in America, Etihad have started operating a route to Abu Dhabi and a route to Qatar will be available in the summer.	

	- There are 13 new routes to commence next year with a mix of destinations and around 55 routes a day to London currently. - Edinburgh Airport have invested significantly in infrastructure including £20 million on a new extension and a further £50 million on back up facilities. Mr Ritchie stated that as part of the drive to make long haul flights more attractive the Scottish Government is looking at air passenger duty which will be devolved under the Smith Commission. Initially under 12s will go free with the view to decreasing APD by 50% and consequently abolishing it. The hope is that this should see an increase in passengers flying to and from Scotland long haul. Mr Martin noted that there had previously been a Government Development Fund from which money was put in for the start up period of new flights in and out of Scotland and questioned if there was anything like the fund now or anything in prospect. Mr Murphy stated it is now the airport who make the business case to help fund routes to start up. Mr Ritchie specified that the fund had been successful but would now fall outwith European Union rules. Instead, Transport Scotland now organise co-operative marketing assistance with airlines which has been successful. Further, Mr Ritchie noted that the plans for APD could provide Scottish airports with a competitive advantage, short term. Mr Marsden raised the issue of connectivity to Heathrow following the withdrawal of Little Red and Virgin. Mr Ritchie acknowledged that it has been difficult to raise interest in these slots and that British Airways currently have a monopoly on the route. While he noted that it would be concerning if these slots were not taken up it may be that there is no interest this year in taking up the slots in Edinburgh and Aberdeen. Mr Macaulay posed the following questions to the group: - The potential loss of connectivity between Aberdeen and Heathrow would be a serious concern for colleagues in the North East of Scotland. With this withdrawal is there a market opportunity for Edinburgh to provide this connectivity? - Is there a scope for encouraging operators who currently run seasonal services to extend these services to avoid the summertime peak situation? - What can the forum do to assist in improving the connectivity in and out of Edinburgh Airport? Mr Williams stated that SCDI have worked previously with Edinburgh Airport on research with the business community regarding priorities with routes that exist at present and route development and would be happy to do so again.	
4.	**Air Freight Provision**	
	Mr Haugen gave an overview of current freight provision statistics at the airport: - Edinburgh airport is the busiest air freight provider in Scotland however it only handles 1.5% of the UK total as opposed to Heathrow which carries 93% total. - The majority of freight from Edinburgh is carried by freight or mail planes as opposed to in large passenger aircraft as is the norm elsewhere.	

	With the increase in long haul flights from Edinburgh, Mr Haugen noted that there may now be scope for further freight opportunities. Mr Murphy stated that Edinburgh airport are looking to grow freight provisions going forward and that DHL, TNT and Royal currently have facilities at the airport. Mr Macaulay noted that SEStran are currently in the first round of a bid for creating a sustainable logistics gateway focused on the forth estuary. The aim is to pull together all the operators in the estuary to create a neutral platform for idea sharing to make freight logistics more sustainable and environmentally friendly and to set up a partnership of organisations involved. SEStran are hoping to engage fully with Edinburgh Airport on this. Cllr Coleman suggested that it would be useful to conduct a scoping exercise to know what it being transported in and out of the airport and then to approach the chambers of commerce with the information. Mr Murphy agreed that members could formulate the questions that need to be answered and he would take this to the airlines and then report back to the group. Further, Mr Haugen suggested that it would be useful to find out what is trucked to Heathrow for freight. Mr Macaulay agreed that this information would be valuable but that it is difficult to extract multi-modal trips from the statistics available and that close involvement with the industry would be required.	Mr Haugen
5.	**Surface Access Strategy and Issues**	
	Mr Turner questioned if the statistics on public transport usage to the airport were going in the right direction. Mr Murphy gave an overview of the current position of public transport at Edinburgh Airport as follows: • The target for public transport usage is 35% by 2017. This figure is due to be reviewed following 1 year of tram service. • Public transport usage declined drastically while the tram was being built but this is slowly recovering. • Current figure for public transport usage is 29.2% which includes 5 bus routes. • Car parking accounts for 16% of passengers and this revenue is invested back in to the airport. • Taxi usage is currently at 21.5% and over 50% of passengers are dropped off. • The airport surface access strategy is available online at http://www.edinburghairport.com/about-us/airport-expansion The group agreed that currently public transport access from Edinburgh and Fife is very good however from the other SEStran areas it is somewhat more difficult. Mr Haugen noted that Edinburgh gateway station is opening next year which should improve public transport access. The lack of cross Edinburgh rail services were raised as an impediment to those travelling to the airport from outwith Edinburgh. Mr Haugen noted that Scotrail are going to look at the potential of a through Edinburgh service in 2-3 years once the borders rail service has been established.	

	The group discussed congestion issues on the roads accessing the airport and noted that the current infrastructure was causing problems. Mr Scott noted that if the road access was made seamless then there would be potential for more services to stop at the airport dependent on a positive business case. Mr Haugen noted that there is a proposal for an Edinburgh Orbital Bus scheme which could help with access to the airport however this has so far not been able to encourage funding.

Mr Marsden noted Transport Scotland are funding a study which will involve looking at what multi-modal interventions can be funded to help mitigate the implications of housing and planned employment development across the SESplan region, looking up to 2024. Mr Marsden added that the SESplan main issues report looks at trying to make the city region a better connected place and will be going to public consultation this summer and welcomed feedback on this.

The use of Ferrytoll Park and Ride as a form of airport access was noted however Mr King stated that long term parking was limited there due to capacity and use of the car park by commuters. Mr Cairns noted that this is not advertised by the airport as a way to access the airport and wondered if this information could be more prominent to the public.

Mr Macaulay stated that the remit for the forum is how to better promote travel to the airport and surface access via sustainable modes and that in terms of surface access there was a need to work together to maximise use of public transport and be open minded about the need for investment for surface access. He stated that there is potentially a scope for SEStran to promote park and ride throughout the region and revisit the SEStran park and ride website for updating. | |
| 6. | **Long Term Strategy for the Airport; connectivity with surface modes** | |
| | Mr Murphy gave an overview of the long term strategy for the airport:
- Looking to have 400,000-600,000 passengers a year.
- Currently looking at new car parking as a revenue source.
- In discussions with the Scottish Government about the potential for new road access to the airport including a new M8 link.
- There is no immediate need for a second runway. This would not be required until around 2040 and air travel may have changed by then.
- Hoping to start consultation on a draft masterplan refresh later this year with the final masterplan being produced next year.

Following a query regarding a wider public transport investment to support the improvements and expansion, Mr Murphy stated that as Edinburgh grows a business case will be built for public transport operators to serve this growth. Mr Ritchie stated that the aim was to make public transport as attractive an option for getting to the airport as possible and suggested inviting some Transport Scotland colleagues to the group to deal with some of the issues discussed.

Mr Macaulay stated that it was worthwhile to recognise that while the Scottish Government has invested heavily in the new forth replacement crossing, this has not been designed to provide any new capacity for private travel and that the public transport strategy for the new crossing is that the growth and demand for the crossing will be taken up by improved public transport. This has resulted in | Mr Ritchie |

	investment in the Forth railway bridge for extra signalling and investment in Halbeath Park and Ride. Mr Macaulay noted the Transport Minister has announced a review of the National Transport Strategy and that Transport Scotland will be consulting on and developing this throughout the year. SEStran recently submitted a review of the Regional Transport Strategy which strengthened the international connectivity element of the strategy and Mr Macaulay noted that they hoped this would encourage the NTS to do the same. Mr Macaulay noted for information that SEStran are hosting a transport conference, on the theme of regional growth, to be held on the 5th November 2015 with the Transport Minister as keynote speaker.	
7.	**AOCB**	
	Mr Drummond noted that Edinburgh Council are currently in the process of crafting a better understanding with Edinburgh Airport between the Chief Executive and Gordon Dewar at the airport. They will be working together on several issues discussed with specific projects including how to relieve pressure on Eastfield road.	
8.	**Future Meeting and Dates (TBA)**	
	Mr Turner suggested that the next meeting be held in November, a few weeks after the SEStran Transport conference. The date of the next meeting will be circulated to members.	

Edinburgh Airport Surface Access - A Discussion Paper

1.   Background

1.1   Around 11.1M passengers used Edinburgh Airport in 2015 and the Airport is the largest in Scotland, both in terms of passenger and freight volume. It is the main airport for the City of Edinburgh and the SEStran area as well as for the Tactran area, i.e. a total of more than 2M people. For many destinations it also serves the whole of Scotland and parts of North of England.

1.2   Passenger growth at the airport has been significantly higher than that predicted in the Airport Masterplan in 2012 and it is increasingly likely that the forecasted passenger flow of 20.5M by 2040 will be achieved at a much earlier stage.

1.3   Currently, road access to the airport is by single carriageway roads; Eastfield Road linking the passenger terminal with the A8, and Turnhouse Road serving the freight terminal.

1.4   Public transport to the Airport has traditionally been by bus, in particular Express Service 100 to Edinburgh although other less frequent services also link the airport with other population centers.

1.5   In 2014, the Edinburgh Tram was completed linking the Airport with the City and in December this year, the Edinburgh Gateway Station (3 tram stops away; near Gogar Roundabout) will open.

1.6   The purpose of this discussion paper is to explore what may be 'expected' in respect of Edinburgh Airport surface access infrastructure in years ahead by exploring what is already provided at some key European Airports that are already of a size where Edinburgh Airport may arguably be in 15 years or so time.

1.7   It could be argued that journey-time predictability for travelling to Airports is more important than for almost any other journey - since the consequences of a failure to catch a flight are in most cases very severe – both in terms of cost as well as inconvenience.

1.8   This paper is not an attempt to come up with a specific future surface access solution for Edinburgh Airport but only to highlight what infrastructure has been implemented at other 'comparable' European airports.

1.9   It should be noted that there is currently significant 'pressure' in terms of land use for areas in the vicinity of the airport, in particular to the south, and there is perhaps a need to debate future access infrastructure requirements sooner rather than later.

2. Growth at Edinburgh Airport.

2.1 The 2012 Masterplan predicted that the Airport would grow from the actual 2009 figure of 9.05M passengers to 12.3M by 2020 and 20.5M in 2040, equivalent to a steady growth of around 2.7% p.a.

2.2 Actual growth between 2009 and 2012 was however (due to the recession) very sluggish at an average of 0.5% p.a. After 2012, the reverse has been the case with 11.12M passengers using the airport last year, representing an average growth of 6.5% between 2012 and 2015. Growth between 2014 and 2015 was even higher at 9.4%

2.3 For the first six months of 2016, growth has been even higher still at a rate of nearly 11% p.a. so it may well be that the 2020 forecast in the 2012 Masterplan will be reached this year, i.e. 4 years early.

2.4 Should the recent trend of high growth continue at, say, a (slightly lower) rate of 5% p.a., the 2040 Masterplan estimate of around 20.5M passengers would be achieved as early as 2028 (i.e. 12 years early) and should the growth rate equal the average 2012-15 growth rate of 6.5% p.a., the 2040 Masterplan estimate would be reached as early as 2025, i.e. in 9 years time.

2.5 It should be noted that, between 2009 and 2015, international traffic has grown much faster than domestic traffic (43% and 6% respectively) and non-EU traffic (to a large extent long haul) has grown the fastest at 111%. This change in traffic mix was already forecasted in the Masterplan and will to a large extent change overall 'passenger behaviour' in respect of surface access

3. Current Surface Access and past and recent proposals

3.1 Most passengers access Edinburgh Airport by road, either in a private or hire car, by taxi or by bus or coach. This will in the main be via the single carriageway Eastfield Rd leading onto the A8.

3.2 There have been proposals in the past to dual Eastfield Rd and to extend it southwards to link it directly with the M8 and the Scottish Motorway and Trunk Road network. There is also a proposal for a new single carriageway road linking the Airport directly with Gogar Roundabout and the Western end of Edinburgh City Bypass.

3.3 Edinburgh Tram has served the Airport from 2014 and in December this year, the new Edinburgh Gateway Station will open. This can be reached by the tram (3 stops away), thereby indirectly linking the Airport with rail services to Dundee, Perth and Inverness. The tram also links the Airport with Edinburgh Park station (5 stops away), thereby indirectly linking the Airport with rail services to Glasgow and Stirling.

3.4 There was a proposal around a decade ago for an Airport Station and a direct rail link through the airport that would have provided direct rail services to/from the Airport for all the seven Scottish cities and around 85% of the Scottish population. However, the scheme (EARL) was abandoned in favour of Edinburgh Tram.

3.5 At the time of the writing of the 2012 Masterplan Strategy, the surface access modal split quoted related to 2009 and was 49% car and hire car, 23% taxi and 28% bus and coach.

3.6 The 2012 Airport Surface Access Strategy set a target of 35% public transport (including tram) modal share by 2017. We do not know if this target is likely to be achieved.

3.7 The Airport Surface Access Strategy also stated the need for road access improvements (link to M8 and a link road to Gogar roundabout) but there was no mention of direct access to the airport by the national rail network.

4. A Surface Access comparison with some European Airports

4.1 The main 'criteria' for being part of a surface access 'comparison' was that
   1. Current traffic level should be between 20M and 30M passengers in 2015
   2. The airport should be located in northern or western Europe
   3. The airport should not be near a major European City (London, Paris, Berlin etc)

4.2 No less than 9 Airports meet all of these criteria and are ranked in size from Copenhagen with 26.6M passengers (ranked 16th largest in Europe) to Dusseldorf Airport with 22.5M passengers (ranked 26th). In comparison, Edinburgh Airport was ranked 43rd in Europe in 2015 in respect of passenger numbers.

4.3 It should be noted that for many of these European airports, the passenger numbers would include a significant number of transit passengers, so the actual passenger number that the surface access infrastructure would serve could be considerably lower than the total airport passenger number. It should be noted that Edinburgh Airport does not have many transit passengers.

4.4 Freight surface access has not been included in the analysis although Edinburgh handles a significant volume of mail and freight by cargo planes – but relatively little by passenger planes – although this may change with the growth in long haul flights.

4.5 **Edinburgh Airport**
   11.1M passengers in 2015
   Located 13 km from City Centre and serves much of the East and South East of Scotland (2M population) as well as Scotland as a whole for many international destinations
   Road Connection: linked by local road to the regional road network
   Tram connection: direct service to City Centre and link to nearby stations on the national rail network
   Current Modal Split: Around 30%(?) by Public Transport

4.6 **Copenhagen Airport**
   26.6M passengers in 2015
   Located only 8 km from the City centre and serves most of Denmark and much of southern Sweden (Malmo area). It is also a hub for the whole of Scandinavia

Road connection: Linked directly to the E20 Motorway (Oresund crossing) and the Danish/Swedish motorway network
Rail connection: Served directly by heavy rail to most of Denmark and southern Sweden
Metro link: Linked directly by the Copenhagen City metro network
Current Modal Split: 61% by public transport; 35% by train, 22% by Metro, 4% by Bus

4.7 Zurich Airport

26.3M passengers in 2015
Located 13 km from the City Centre and serves the greater Zurich area as well as the whole country for many international destinations
Road Connections: Served directly by A51 Motorway
Rail connection: Linked directly to the national rail network
Tram connection: Direct tram service to the City Centre
Current Modal Split: 43% by Public Transport

4.8 Dublin Airport

25M passengers in 2015
Located 10 km from City Centre and serves most of Ireland
Road connections: directly linked to the M1, M540 and the national motorway network
No direct Rail, Metro or Tram service
Current Modal Split: 26% by Public Transport (Bus)

4.9 Oslo Airport

24.7M passengers in 2015
Located around 50 km from Oslo and serves a population of around 2.6M but is also a hub airport for the whole of Norway.
Road connection: Linked directly to the Oslo – Trondheim Motorway (E6) as well as the E16 Trunk route
Rail connection: Linked by High Speed Rail to Oslo as well as directly served by Oslo – Lillehammer – Trondheim rail services.
Current Modal Split: Nearly 70% by Public Transport, of which around 2/3rd by rail and 1/3rd by bus

4.10 Brussels Airport

23.5M passengers in 2015
Located 14 km from the City Centre and serves the whole of Belgium
Road connection: Linked directly to the motorway network E40/E19
Rail connections: Linked directly with the Belgian and European rail network
Current Modal split: 27% by Public Transport; 20% by train, 7% by bus

4.11 Stockholm Arlanda Airport

23.1M passengers in 2015
Located 44 km from the City and serves the whole of the larger Stockholm region and much of Northern Sweden
Road connection: Linked directly to E4 and the motorway network
Rail connection: Served by High Speed Rail to Stockholm and by local trains for the Stockholm Region. Also linked directly with northern and central Swedish towns and cities by regional and long distance trains.
Current Modal split: 52% by Public Transport; 31% by rail, 21% by bus

4.12 **Manchester Airport**
23.1M passengers in 2015
Located 14 km from Manchester City Centre and serves the whole of Northern England
Road connection: Linked directly to the M56 and the UK motorway network
Rail connection: Served directly by train to Manchester and most of the main North of England cities and towns as well as Edinburgh and Glasgow
Tram connection: Served by direct tram link to Manchester (opened 2014)
Modal split: 23.9% by Public Transport (2013; pre tram); 2.4% bus, 13.8% rail, 7.7% PT Park&Ride)

4.13 **Vienna Airport**
22,8M passengers in 2015Located 18km from the City Centre and serves the whole of Austria as well as parts of Slovakia, Check Republic and Hungary.
Road connection: Linked directly to the A4 and the motorway network
Rail connection: Linked directly with the City and is also part of the ninter-city network
S-Bahn: Linked directly with the local S-Bahn network
Modal split: Not readily available

4.14 **Dusseldorf Airport**
22.5M passengers in 2015
Located 7 km from Dusseldorf and 20km from Essen; serves the whole of the Ruhr area
Road connection: Linked directly to the German motorway network with the A44
Rail connection: Airport station is located 2.5 km away from the terminal and is connected to the German inter-city network
S-Bahn: The Airport S-Bahn station is located at the Terminal and links the airport with the local S-Bahn network
Modal split: 30.4% by Public Transport; 21.2% by train, 7.3% by S-Bahn, 1.9% by bus

5. **Discussion**

5.1 This brief insight into surface access provision and modal split at some European Airports (of a comparable size of what Edinburgh may be in the not so distant future) should only be regarded as an overview and not as a template for the development of surface access at Edinburgh Airport.

5.2 Numerous other factors will have to be built into the equation, including the size and nature of the catchment area, the overall transport infrastructure within that area, the distance of the airport from the main City, the traffic mix at the airport (domestic, international, long-haul, charter, transit etc), the size of the airport labour force and the nature of all the activities at the airport, the volume and nature of air freight and so on.

5.3 Planning of surface access will of course also greatly depend on the development of the airport itself, not least in respect of terminal development.

5.4 What is quite clear though is that all the Airports that fall within the parameters of this discussion paper do have direct access to the national motorway

network whereas it would be reasonable to say that Edinburgh Airport falls short in this respect.

5.5   All but one of the airports (Dublin) are served directly by the national rail network although to what extent the rail network serves the full catchment area will vary considerably.

5.6   Provision of bus and coach services is not included in this discussion paper since they do not depend to the same extent on a 'designated infrastructure' other than the presence of an adequate road network.

5.7   Public transport's share of the surface access market varies considerably but it could perhaps be argued that to reach a very high modal share of more than 50%, direct access by heavy rail would be required. The three main Scandinavian airports are the trend-setters in this respect and Oslo's near 70% public transport modal share is apparently the highest in the world, followed by Hong Kong

5.8   In light of all the above, what additional requirement is there for the development of new transport infrastructure to serve Edinburgh Airport in the future?

Trond Haugen
Advisor to SEStran

15 August 2016