
**LONDON'S
CONNECTIVITY
COMMISSION**

**CALL FOR
EVIDENCE**

London First

London's Connectivity Commission members:

Peter Robinson (Chair)	Chairman and Partner, Berwin Leighton Paisner
Peter Damesick	EMEA Chief Economist, CB Richard Ellis
Chris Elliot	Managing Director and Head of Infrastructure Investing – London, Barclays Capital
Sir Adrian Montague	Chairman, 3i, Anglian Water and London First
Ruby Parmar	Senior Partner, PwC
Mike Redican	Managing Director, Deutsche Bank
Francis Salway	Group Chief Executive, Land Securities
Andy Street	Managing Director, John Lewis
John Vincent	Director, Strategic Planning & Advisory, Global Transportation, AECOM

The London First Connectivity Commission webpage at www.londonfirst.co.uk/connectivity-commission provides more information.

Please send submissions to Anna Ridler at either the postal or email address below.

Responses will be published online unless otherwise requested.

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INTRODUCTION

1. London First, the business-led membership organisation whose mission is to make London the best city in the world in which to do business, has established a Commission to examine London's transport infrastructure links with the rest of the UK and the wider world. Its start point is the proposition that London's continued success as a leading centre for world trade and commerce is critically dependent on free-flowing, frequent and predictable travel to and from the capital.
2. London's connectivity is defined here by the infrastructure that enables the movement of people for the purpose of business on the UK's rail, road and air networks. The Commission will examine the capacity, quality and resilience of this infrastructure and the services it supports, along with the constraints faced. It will take written and oral evidence from interested parties and will form policy recommendations to tackle these constraints in the short, medium and long term. The outcome being sought is a national transport strategy that supports both London's ability to remain competitive with other world cities and the UK's long term growth.
3. By responding to this call for evidence, businesses, user groups, experts, providers, funders, regulators, Government and other key players can make their views known to the Commission. This document poses some questions and sets the context to them - to help stimulate responses, but by no means to limit them. For ease, questions are categorised, but responses need not be tied to these categories.
4. The Commission is keen to understand the changing needs of business for travel. It would welcome evidence which reflects the experience of users; but equally encourages expert views that, where relevant, extend beyond the questions set. It would also welcome evidence on the extent to which video conferencing and other forms of electronic communication are reducing the overall amount of travel taken. Further background on the ownership, investment and funding of the UK's rail, road and air infrastructure can be found in the Annex (Page 12).
5. There is no expectation that all questions should be answered, and submissions can also take the form of reports already written. If existing reports are submitted, please provide a summary of no more than two sides of A4.
6. **The deadline for submitting written responses is 10 June 2011.**

DEMAND FOR LONDON'S LINKS

7. The UK's continued competitiveness and future economic growth will be supported by London's ability continuously to attract talent and investment from around the world.
- London is a major trading partner with the rest of the UK, purchasing approximately £123 billion from, and selling £130 billion worth of goods and services to, the rest of the UK - the relationship diminishing with distance from London¹.
 - London is a major trader with the world, accounting for around a third of all UK services exports. The capital's exports of goods and services have grown substantially in recent years to over £66 billion in 2008, up from £38 billion in 2002².
 - London is Britain's principal gateway to capital and labour from overseas. It is home to the European headquarters of one third of the Fortune Global 500 companies and is the number one European destination for foreign direct investment (FDI)³. Since 1995 the UK has attracted more FDI than its main European competitors (Germany, France and the Netherlands), increasing its stock five-fold in that period (to around \$1,000 billion in 2008)⁴.
8. London sees 10 million journeys taken every day on public transport⁵, and is also a large source of demand for travel beyond its boundaries. Every year, over 200 million passengers pass through UK airports: over 60 per cent do so through London area airports⁶, a third of these doing so for business⁷. Over 80 per cent of the UK population travel to work by road⁸: while London and the South East's roads carry almost a third of the UK's traffic. Over three million rail journeys are made every day⁹, of which around 2.5 million start or end in London, with over two thirds of these journeys being made for the purposes of commuting or business¹⁰.

¹ London's links: Who benefits from London's success? Centre for Cities, 2007.

² Mayor's Economic Development Strategy, 2009.

³ Ernst & Young European Investment Monitor 2009.

⁴ United Nations Conference on Trade and Development (UNCTAD), World Investment Report, 2009.

⁵ Travel in London Report 3, Transport for London, 2010.

⁶ UK Airport Statistics: 2009, Civil Aviation Authority, 2009.

⁷ UK Business Air Travel: Traffic Trends and Characteristics, Civil Aviation Authority, 2009.

⁸ Road File 08/09, Road Users' Alliance, based on 2007 statistics, Department for Transport.

⁹ National Rail Travel Survey Overview Report, Department for Transport, 2010.

¹⁰ National Passenger Survey, 2010.

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9. There has been significant growth in demand for the transport infrastructure that links London with the rest of the UK and the wider world **[see fig 1]**. Much of this infrastructure is at or near capacity and in many cases is ageing, heavily congested and lacks resilience when put under pressure. In the face of growing international competition, the sustainability of the UK as a fulcrum of the global economy cannot be taken for granted. As the Department for Transport puts it: “Congestion [on critical transport infrastructure] is a drag on businesses and on our international competitiveness at a time when competitiveness is vital to securing economic growth and job creation.”¹¹

 10. While punctuality on the rail network has risen in the last decade, and 90 per cent of the trains serving London arrive on time¹², the 10 most overcrowded services in the UK are ones which serve the capital¹³. A fifth of the UK’s road congestion occurs in the capital¹⁴ and London has the slowest average vehicle speeds in the country - other than Coventry, it is the only area in the UK that sees average speeds fall below 10 miles per hour in the morning peak. London’s largest airports, Heathrow and Gatwick, suffer the greatest flight delays of all major European rivals (Frankfurt, Amsterdam and Paris)¹⁵.

¹¹ Investment in Highways Transport Schemes, Department for Transport, October 2010

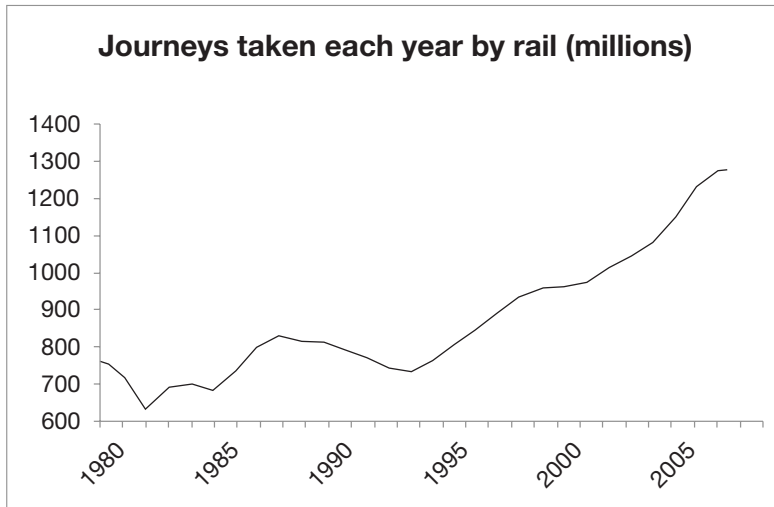
¹² The Public Performance Measurement (PPM) classes long distance trains as ‘on time’ if within 10 minutes of the timetabled arrival time, and all other trains as such if arriving within 5 minutes of timetabled arrival time.

¹³ Department for Transport, 2010.

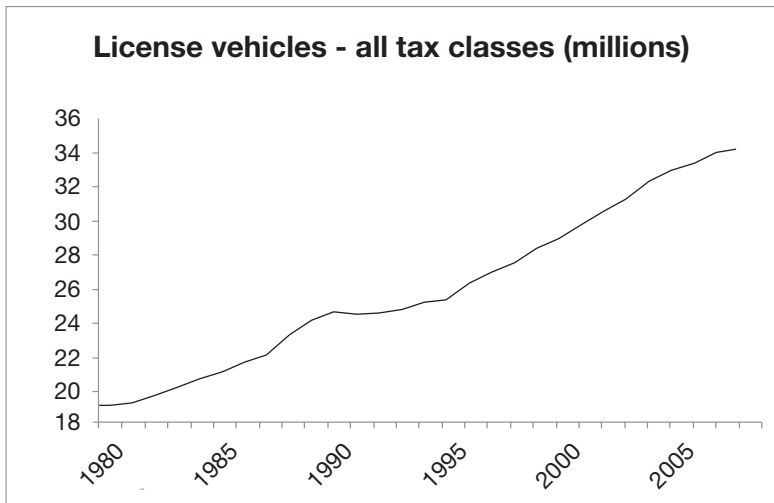
¹⁴ A measure broadly equivalent to the time spent stationary by vehicles in queues; Travel in London Report 3, TfL, 2010.

¹⁵ Delays per aircraft arriving and departing (average across 2007-2009), A new airport for London, Mayor of London, 2011.

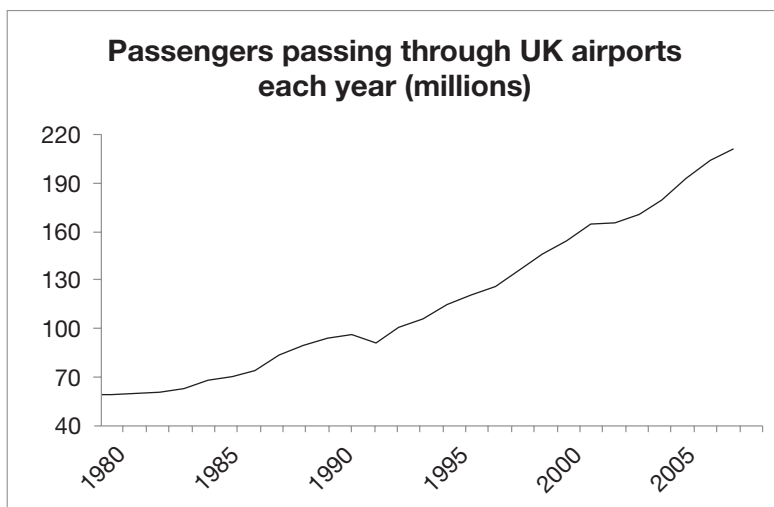
FIG 1: Growing demand for transport infrastructure



Source: Department for Transport



Source: Department for Transport



Source: Department for Transport

CLIMATE CHANGE & ALTERNATIVES TO TRAVEL

11. Around five per cent of all emissions produced in the UK are from air transport, while 22 per cent are from surface transport. Almost all of those from surface transport - 97 per cent - are from road vehicles¹⁶, with cars accounting for the lion's share (60 per cent).
12. The 2008 Climate Change Act enshrined a legally binding target to reduce UK greenhouse gas emissions to at least 80 per cent below 1990 levels by 2050. Carbon budgets set as a consequence require a return to 2005 emissions levels for air transport, and a reduction of over 90 per cent in emissions from surface transport by 2050¹⁷. The Climate Change Committee¹⁸ recommends a number of routes to this reduction, including the widespread roll-out of electric cars and vans across the UK, with the right financial support and charging infrastructure; hydrogen technologies for buses; and behavioural change, spurred by 'smarter' travel plans and greater access to public transport.
13. It is unclear how flexible working, videoconferencing and access to new technologies, devices and systems will affect the amount of travel undertaken by business in the future. Estimates of demand for flights, for example, range widely, from no net impact (with videoconferencing resulting in a higher level of business interaction), to a 30 per cent reduction in business air travel demand in 2050, the greatest reduction estimated in academic literature and suggested by current best practice¹⁹.

The needs of business

- Q1 *What corporate policies have resulted in a reduction in travel, over what period, and on which modes of transport?*
- Q2 *To what extent has technology - for example video conferencing - reduced the overall amount of travel taken by road, rail or air, and to what extent does it offer sustained and significant opportunities to do so in future?*
- Q3 *What trends in business travel should be reflected in priorities for current and new infrastructure?*
- Q4 *More broadly, should policy or pricing options be considered to manage demand for transport infrastructure, and if so, which?*

¹⁶ Car, bus, HGV and van.

¹⁷ With a 44% reduction from 2008 levels by 2030.

¹⁸ Established to provide independent advice to Government on setting and meeting carbon budgets and targets.

¹⁹ Meeting the UK Aviation target - Options for reducing emissions to 2050, Committee on Climate Change, 2009.

RAIL LINKS

14. Since privatisation in 1994, the UK's rail network has seen record growth in demand. Train travel is at its highest peacetime level since the 1920s. Over a billion journeys are made on it every year. Every day in the morning rush hour, 600,000 passengers enter central London by train. Half do so in conditions classed as overcrowded²⁰. By the Government's analysis, the ten most overcrowded services in the UK serve the capital.²¹
15. Significant levels of public investment are set to enhance this infrastructure. Network Rail's gross revenue requirement of around £5.3 billion a year to 2014²² is tied to meeting growing demand for services and delivering greater efficiency. In parallel, the Government has announced it will increase the cap on regulated rail fares from the current RPI +1 per cent to an average annual increase of RPI +3 per cent for three years from January 2012. In rebalancing the burden between farepayer and taxpayer, the Government has explicitly linked this fare increase to the improvements needed to relieve overcrowding and improve the passenger experience.

Q5 How well do London's rail links with the UK and continental Europe meet the needs of business, for both commuting and intercity travel?

Q6 To what extent will London's rail links with the UK and the wider world cope with growing demand in the short, medium and long term?

Q7 Which policies and expenditure should be prioritised for rail transport infrastructure in the short, medium and long term, and against what criteria or analysis?

Q8 What balance should Government policy strike between the delivery of new rail infrastructure, the better use of current infrastructure, and better interconnections with other means of transport?

²⁰ Increasing Passenger Rail Capacity, Department for Transport and the Office of Rail Regulation/National Audit Office, June 2010.

²¹ Department for Transport, based on Autumn 2009 figures.

²² 2006/07 prices.

ROAD LINKS

16. While over 70 per cent of all commuting and business trips are made by car²³, the UK has one of the lowest motorway capacities in Western Europe²⁴. Its motorways are used two and a half times more intensively than the average of eight major nations²⁵ [see fig 2]. Road traffic has historically increased in line with economic growth rather than growth in the road network. In the last thirty years, car traffic across the UK has almost doubled²⁶, although in the decade to 2008, while traffic on motorways increased by 17 per cent, the motorway network grew by only four per cent²⁷.
17. Most funding to maintain and improve the UK's road infrastructure comes from central government, although annual revenue of around £46 billion raised from motoring tax²⁸ - fuel excise duty, road tax and VAT - is not hypothecated. Other revenue and charging regimes exist, but they are the exception rather than the rule. They include the London Congestion Charge and tolls on the Dartford Bridge and the M6 relief road. Road-related revenues (fuel tax, vehicle tax and tolls) are on average lower in the UK than elsewhere in continental Europe²⁹.

Q9 How well do London's road links with the UK meet the needs of business?

Q10 To what extent will London's road links with the UK cope with growing demand in the short, medium and long term?

Q11 Which policies and expenditure should be prioritised for road transport infrastructure in the short, medium and long term, and against what criteria or analysis?

Q12 What balance should Government policy strike between the delivery of new road infrastructure, the better use of current infrastructure, and better interconnections with other means of transport?

²³ Road File 08/09, Road Users' Alliance, based on Department for Transport statistics, 2007.

²⁴ Motorway length compared to land, GDP and population. House of Commons Transport Select Committee, The Major Road Network, 2010.

²⁵ The top five EU countries by population, and the USA, Canada and Japan; 'London in Austerity', Prof. Glaister in 'London: Coping with austerity: A review of housing, planning and public policy issues', LSE London, October 2010.

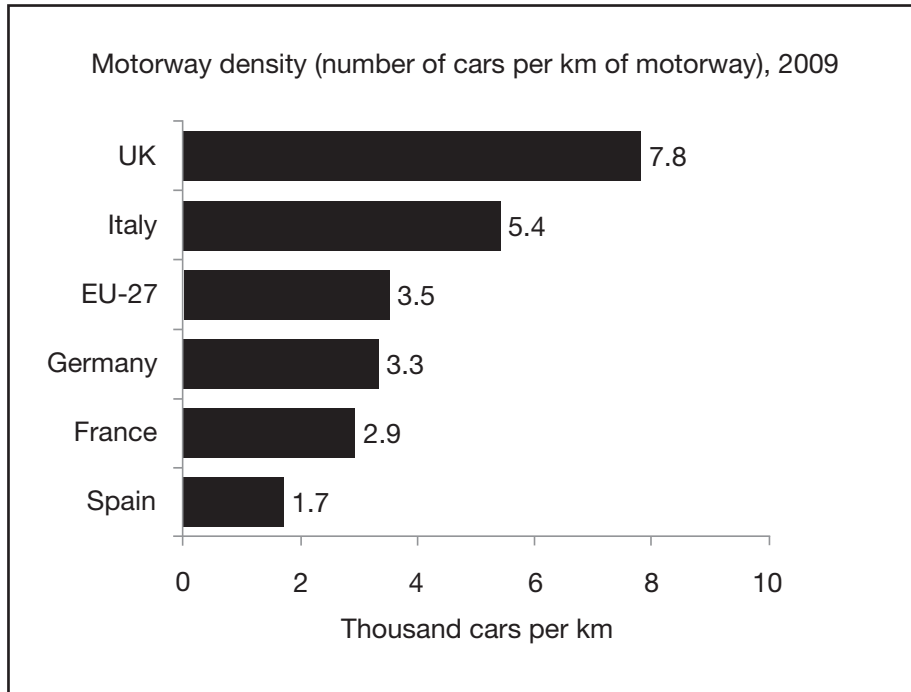
²⁶ Road Statistics 2009: Traffic, Speeds and Congestion, Department for Transport, June 2010. Figures are for Great Britain.

²⁷ 'London in Austerity', Prof. Glaister in 'London: Coping with austerity: A review of housing, planning and public policy issues', LSE London, October 2010.

²⁸ Taxes and charges on road users, House of Commons Transport Committee, July 2009.

²⁹ From Austerity to Prosperity: Seven Priorities for the Long Term, McKinsey, 2010.

FIG 2: UK motorway density (number of cars per km of motorway), 2009



Source: European Commission 2009

AIR LINKS

18. While showing overall growth, demand for air transport is highly cyclical, with economic downturns resulting in significant drops in the number of flights taken. Since 1980 the number of passengers passing through UK airports has grown more than four-fold³⁰. Every year, over 200 million passengers pass through UK airports. The four largest UK airports by passenger numbers are Heathrow, Gatwick, Stansted and Manchester³¹.
19. Heathrow is the UK's largest business airport, with two thirds of all passengers who terminate in London for business doing so at Heathrow. As a hub airport, Heathrow enables airlines to pool transfer passengers, and supplement passenger numbers on more, and more frequent, direct long-haul flights that otherwise would not be economically viable. Heathrow is running at around 99 per cent of its permitted runway capacity, with the result that it is the most delayed of any comparable European airport [see Fig 3]. Gatwick is nearly full at peak times.

Q13 How well do London's air links with the UK and the wider world meet the needs of business?

Q14 To what extent will London's air links with the UK and the wider world cope with growing demand in the short, medium and long term?

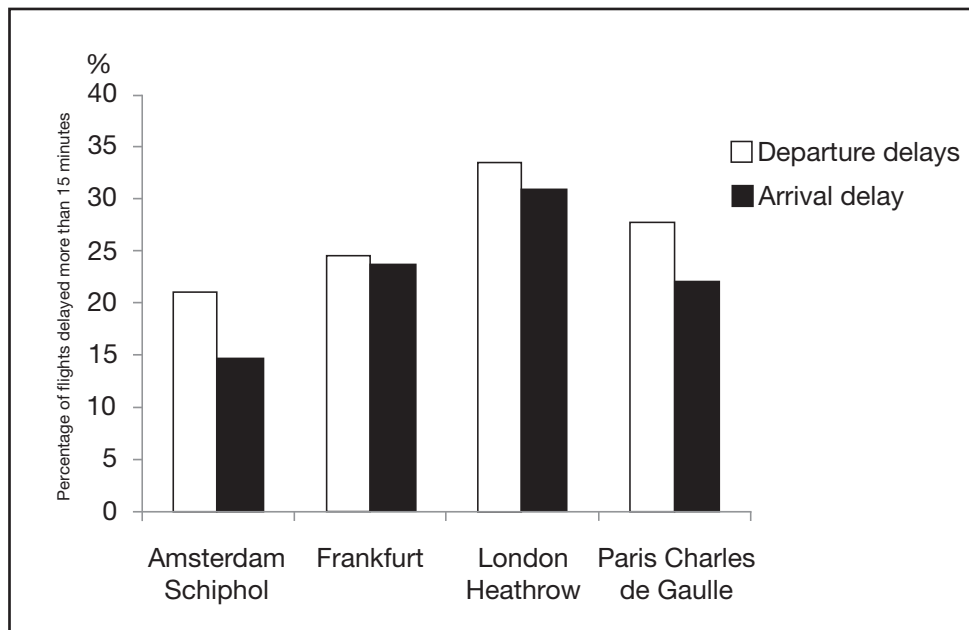
Q15 Which policies and expenditure should be prioritised for air transport infrastructure in the short, medium and long term, and against what criteria or analysis?

Q16 What balance should Government policy strike between the delivery of new air transport infrastructure, better use of current infrastructure, and better interconnections with other means of transport?

³⁰ Transport Trends 2009, Department for Transport, 2009.

³¹ UK Airport Statistics: 2009, Civil Aviation Authority, 2009.

FIG 3: Proportion of flights delayed at European hub airports (2007)



Source: Association of European Airlines' delay rates by airport on Intra-European service - full year 2007

POLICY & DELIVERY

20. The Government forecasts that over the next five years around £200 billion will be invested in the UK's economic infrastructure, around £30 billion of which will be invested in transport infrastructure³². The Government aims to update annually its National Infrastructure Plan, which set out its view of the infrastructure investment required to underpin the UK's economic growth.
21. The policy context for this Commission's work will include: the Government's review of national aviation policy, in the context of its current opposition to new runways in London and the South East; a structural review of Value for Money on rail (the McNulty Review) through which the Government seeks to find significant and lasting ways to reduce cost; and the development of National Policy Statements for the strategic road and rail networks, which may be accompanied by a new Rail White Paper. The Government has also published proposals for the development of a high speed rail network, beginning with its route from London to the Midlands. It indicates the first part of this network would be delivered sometime between 2026³³.

Q17 What changes - for example in institutional ownership and funding, industry structure or regulation - should be considered to increase the quality and capacity of London's transport links with the UK and the wider world?

Q18 How can risks best be shared between government and the private sector to encourage additional private investment?

Q19 Which financing models best capture the benefits generated by improved transport infrastructure to support investment?

Q20 What funding, pricing and user charging mechanisms should be considered to:

- a. Attract investment where it is most needed*
- b. Best capture negative externalities - eg spill-over effects such as carbon emissions or air pollution*
- c. Prioritise journeys for business*

Q21 What are the greatest barriers to delivering new transport infrastructure (eg. planning, finance, regulation)?

Q22 What impact will the Government's localism agenda have on planning for infrastructure?

³² National Infrastructure Plan, HM Treasury/Infrastructure UK, October 2010.

³³ High Speed Rail: Investing in Britain's Future, Consultation, DfT, February 2011.

ANNEX - OWNERSHIP, INVESTMENT, FUNDING

RAIL

22. Britain's rail infrastructure³⁴ is run, maintained and developed by Network Rail, a private sector organisation, established as a company limited by guarantee (for profit but not for dividend). The structure of the rail industry is complex and involves a number of contractual and regulatory interfaces. Government support is delivered through central Government grants directly to Network Rail, and through subsidies via franchise agreements to private train operating companies.
23. The rights and obligations of both Network Rail and the train operators are set out in access contracts; while franchising agreements between the Government and private train operators set service levels, fares and ticketing policy, as well as the level and timing of subsidy and premium payments, and risk sharing arrangements.
24. Government sets high level outputs and available funding. The rail regulator, the Office for Rail Regulation (ORR), translates these into detailed outputs for Network Rail, along with the funding requirements. The regulated review process marks out five year control periods. The ORR monitors and enforces these outputs through the Network Licence.
25. In its October 2010 spending review, the Government left Network Rail's periodic funding settlement³⁵ essentially intact, and decided not to revisit Network Rail's gross revenue requirement of around £5.3 billion a year to 2014³⁶, which is tied to Network Rail's commitment to meet growing demand for services and deliver greater efficiency. This expenditure comprises:
 - £7.6 billion on capacity increases and major projects, for example the Thameslink upgrade or the expansion of Reading's station and tracks for commuter routes into Paddington;
 - £10.8 billion on the renewal of ageing infrastructure, replacing sections of track or signalling systems; and
 - £10 billion on maintenance.

³⁴ Tracks, signalling system, rail bridges, tunnels, level crossings, viaducts and 18 key stations.

³⁵ For the period 2009 - 2014.

³⁶ 2006/07 prices.

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26. The Government has instigated a major structural review of Value for Money (the McNulty Review) to find significant and lasting ways to reduce cost and deliver an affordable and sustainable railway, noting that in the last decade:
- Reliability - the percentage of trains on time - rose from 79 per cent to 91 per cent;
 - Passenger revenues grew from £4 billion to £6 billion a year; and
 - Overall taxpayer funding rose from £2.3 billion to £5.2 billion a year³⁷, with the largest increases occurring since 2002³⁸, in part a consequence of costs being 40 per cent higher than those at the time of privatisation³⁹.
27. The ORR will shortly begin the next periodic review process to determine Network Rail's outputs (from 2014 to 2019); the Government will respond in July 2012 by setting high level outputs and the funding available. In parallel, the Government will respond to the conclusions of the McNulty Review on reducing costs. The Secretary of State for Transport has also established a high-level team of academics and executives from the rail industry to consider structural reform of Network Rail, having expressed interest in options to devolve decision-making to regional level, and align track and train operations.
28. The Government has published proposals for the development of a high speed rail network on the first part of its route from London to the Midlands. It will consult on these proposals in 2011 and set out a final strategy later in the year, while adding detail regarding the longer term extension of the network to Scotland. Government forecasts the first part of a high speed rail network would be delivered sometime between 2026 and 2031⁴⁰.
29. **Demand**
- Since privatisation in 1994, passenger numbers have grown by 73 per cent, reaching levels higher than at any time since the 1920s⁴¹.
 - 1.2 billion journeys are made every year on the UK's rail network⁴².
 - Every day in the morning rush hour, 600,000 passengers enter central London by train. Half travel in conditions classed as overcrowded⁴³.
 - Passenger numbers are forecast to double in the next 30 years⁴⁴.

³⁷ 1993/94 to 2008/09; 2008/09 prices.

³⁸ Following the Hatfield and Potters Bar accidents; and the entry of Railtrack into administration in 2001.

³⁹ Per passenger train kilometre.

⁴⁰ Baseline Forecasting Report: A Report for HS2, Atkins, February 2010.

⁴¹ In peacetime.

⁴² National Rail Trends 2009-10 Yearbook, Office of Rail Regulation, 2010.

⁴³ Increasing Passenger Rail Capacity, Department for Transport and the Office of Rail Regulation/National Audit Office, June 2010.

⁴⁴ Delivering a Sustainable Railway, Department for Transport, 2007

ROAD

30. Over 97 per cent of England's roads are owned and managed by more than 150 local authorities⁴⁵. These local roads carry around two thirds of all traffic. The remaining 2.4 per cent of the road network - the strategic network of motorways and trunk roads - carries a third of all passenger traffic in England⁴⁶. The strategic road network is the responsibility of central government and is maintained and operated by the Highways Agency, working through contractors. The Highways Agency values its network at over £81 billion.
31. As discussed in paragraph 11, UK motorways are used two and a half times more intensively than the average of eight major nations⁴⁷. It is estimated that congestion in England, if left unchecked, could waste an extra £22 billion worth of time every year by 2025 and increase costs to business by over £10 billion a year⁴⁸.
32. While ruling out a major road-building programme, the Government has committed almost £6 billion to enhancing the strategic network over the next four years - a mix of improved road widening, hard shoulder use, and measures to tackle congestion - in addition to around £3 billion in the same period for maintenance. The Government's support for capital investment in local roads outside London - currently around £1.3 billion a year - is distributed to local authorities on a formula basis. These funds are not ring-fenced, and it is for the authority to decide both how and where to spend on roads.
33. The Government will publish a draft National Policy Statement for national networks in 2011, covering the strategic road network. It has stated, in parallel, its wish to review the Highways Agency's performance and structure, establishing both an independent expert group to monitor efficiency, and appointing for the first time a non-executive Chairman to ensure greater efficiency and provide independent advice to the Secretary of State.
34. **Demand**
- Since 1980, car traffic across the UK has risen by 86 per cent⁴⁹.
 - The UK is expected to see a 43 per cent growth in traffic by 2035⁵⁰; with motorways seeing almost 50 per cent growth in traffic⁵¹.
 - Business travel time lost as a result of congestion is forecast to grow by 154 per cent by 2035⁵².

⁴⁵ The Resilience of England's Transport Systems in Winter - an Independent Review, Final Report, commissioned by the Department for Transport, October 2010.

⁴⁶ And two thirds of all road freight.

⁴⁷ The top five EU countries by population, and the USA, Canada and Japan; Glaister report. Prof. Glaister in 'London: Coping with austerity: A review of housing, planning and public policy issues', LSE London, October 2010.

⁴⁸ Roads - Delivering Choice and Reliability, Department for Transport, July 2008. Figures are for Great Britain.

⁴⁹ Road Statistics 2009: Traffic, Speeds and Congestion, Department for Transport, June 2010. Figures are for Great Britain.

⁵⁰ Road Traffic Forecasts 2009, National Transport Model, Department for Transport.

⁵¹ Ibid.

⁵² Ibid.

AIR

35. Most of the UK's major airports are privately owned and funded⁵³ and serve a mix of business, leisure and niche markets. There is a network of smaller regional airports serving general and business aviation services. The Government sets national strategic policy. The regulator - the Civil Aviation Authority - in addition to its duties on safety and airspace management, sets the charges paid by airlines at airports designated by the Government: namely, Heathrow, Gatwick and Stansted⁵⁴. At these airports, price cap regulation allows the operator to keep any profits resulting from efficiency gains beyond the level prescribed in the pricing mechanism. BAA Airports currently owns and operates six UK airports - Heathrow, Stansted, Edinburgh, Aberdeen, Glasgow and Southampton. In 2009, Global Infrastructure Partners (GIP) became the owners of Gatwick Airport Limited.
36. The four largest UK airports by passenger numbers are Heathrow (66 million passengers per annum (ppa)), Gatwick (32 million ppa), Stansted (20 million ppa) and Manchester (19 million ppa)⁵⁵. Heathrow is Europe's largest hub airport⁵⁶ and the UK's largest business airport: two thirds of all passengers terminating in London for business do so at Heathrow. As a hub airport it enables airlines to gather transfer passengers, supplementing passenger numbers for direct long-haul flights that would not otherwise be economically viable. This allows airlines to develop and sustain routes to more destinations as well as a greater frequency of flights.
37. The Government has committed to introducing a bill to reform economic regulation. This will seek to replace the existing framework for setting price caps at airport with a more flexible approach, including licences which define outputs on service quality, and with the regulator adopting a new sole primary duty to the passenger. Sharper incentives to improve the passenger experience are being sought alongside the removal of unnecessary regulation in order to allow competition to thrive.
38. The Government's Climate Change Committee⁵⁷ has concluded that a 60 per cent growth in flights by 2060 is compatible with the UK meeting overall national carbon reduction targets. The Transport Secretary has announced his intention to develop a new aviation policy framework - the first such review since the 2003 Air Transport White Paper. The Mayor, while having no statutory responsibility for aviation policy, believes new runway capacity in the South East is essential to secure London's long term competitiveness. He is actively exploring a four runway hub airport in the Thames Estuary.

⁵³ With the exception of Birmingham International Airport - A public limited company with shares wholly owned by the seven District Councils of the West Midlands County (Birmingham City Council, Coventry City Council, Dudley Metropolitan Borough Council, Sandwell Metropolitan Borough Council, Solihull Metropolitan Borough Council, Walsall Metropolitan Borough Council and Wolverhampton City Council) and Manchester Airports Group - the four airports of Manchester, East Midlands, Bournemouth and Humberside. This group is publicly owned by the ten local authorities of Greater Manchester and is privately managed on their behalf.

⁵⁴ Manchester Airport was de-designated for regulatory purposes from 1 April 2009.

⁵⁵ UK Airport Statistics: 2009, Civil Aviation Authority, 2009.

⁵⁶ By passengers numbers.

⁵⁷ Committee on Climate Change "Meeting the UK aviation target – options for reducing emissions to 2050", 2009

39. **Demand**

- The number of passengers passing through UK airports has increased more than four-fold since 1980⁵⁸.
- Every year, around 240 million passengers pass through UK airports. Nearly 60 per cent of them do so through London area airports⁵⁹.
- The demand for flights in the UK is forecast to nearly double by 2050⁶⁰. Demand for flights to and from London could rise to 280 million passengers a year⁶¹. London's theoretical airport capacity stands at roughly 180 million passengers a year⁶².

40. **Delays**

Heathrow's passengers face longer flight delays than at any comparable airport in Europe. In 2007 just over one in three flights departed late (average delay: 33 minutes) and just under one in three flights arrived late (average delay: 37 minutes).

⁵⁸ Air transport statistics, House of Commons briefing note, October 2009; UK airport statistics, Civil Aviation Authority.

⁵⁹ Heathrow, Gatwick, London City, Stansted, Luton - CAA Passenger Survey Report, 2006.

⁶⁰ UK Air Passenger Demand and CO2 Forecasts, Department for Transport, 2009.

⁶¹ A new airport for London, Mayor of London, 2011.

⁶² Mayor's Transport Strategy, Greater London Authority, May 2010.
