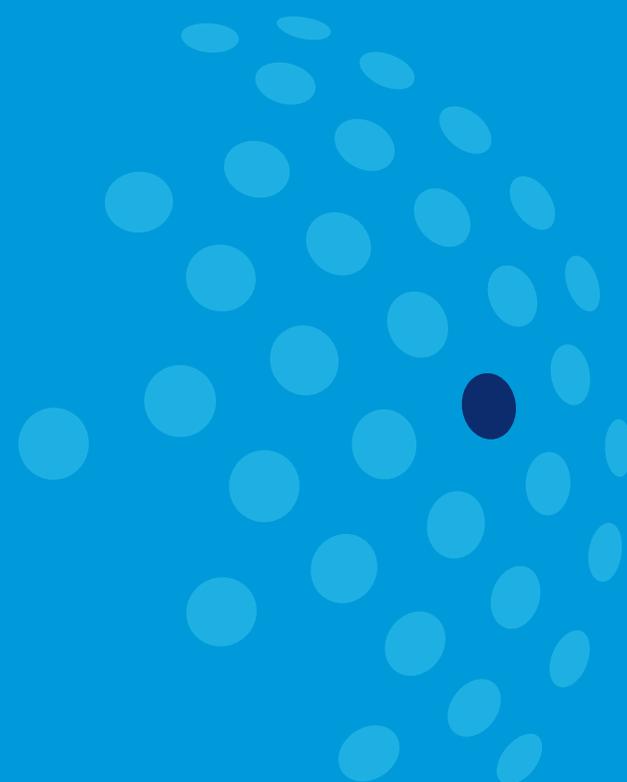


01

Our ambition

Birmingham Airport is already the preferred national and international aviation hub for the Midlands and our ambition is to build on this, by providing the destinations and services our passengers require, to become one of Europe's leading regional airports. We will act as a key economic accelerator for the region and provide the air connectivity vital for the expansion of international trade, investment and employment, the growth of inbound tourism, and access to outbound leisure destinations.



To achieve our ambition, we will:

- Increase the range of destinations and frequency of flights.
- Invest in expanded and enhanced facilities to provide the customer experience to underpin our growth.
- Meet or exceed regulatory requirements to ensure safety and security.
- Play an active and responsible role in the community by avoiding, reducing and mitigating the adverse environmental impacts of the Airport where possible.
- Work closely with our partners in local and national government to ensure the Airport can best serve the region and is not constrained by insufficient land, surface transport or airspace capacity.

Economic accelerator

Outside of London and the south-east, the West Midlands boasts the fastest growing economy in the UK¹, and has the highest rate of exports². Our region's economic activity has a value of £92 billion GVA³. It is home to the largest concentration of businesses outside of London and is attracting record levels of foreign direct investment³.

2017/18 was the busiest year in our history, with 13 million passengers flying, increasing from less than 9 million only 5 years earlier. By 2033, we forecast passenger demand to rise by a further 40% to 18 million per year. In this period, we will deliver:

- Investments totalling £500 million to extend our terminal and apron capacity, expand and upgrade our facilities and, by doing so, improve the overall customer experience.
- A 42% increase in our net regional economic contribution – from £1.5 billion to £2.1 billion.
- An 11% increase in net regional employment – from 30,900 to 34,400 jobs.

Working in partnership with local businesses and stakeholders we are a key facilitator of international trade for Midlands businesses. The Airport's impact as a transport hub attracts high value-added investment and jobs in the internationally traded sectors making it a major accelerator of the region's economy.

As a public/private partnership we can self-finance our expansion, securing wider public benefits of connectivity and employment growth, and underpinning the region's current resurgent economic performance.

Our ambition matches the region's dynamism, which is attracting employers, such as Jaguar Land Rover, from high growth sectors including advanced manufacturing and engineering, life sciences and renewable energy. Our communities are seeing the benefit with average earnings increasing and unemployment falling.

The establishment of the West Midlands Combined Authority, the arrival of HS2 on the horizon, and international events such as the Commonwealth Games and Coventry City of Culture promise to further boost the awareness and appeal of the region.



A dynamic region

Home to leading car manufacturers

Emirates A380 service

Connects us with the hub in Dubai

¹ Regional & Local Economic Growth Statistics, ONS, 5 September 2018

² HMRC UK Regional Trade Statistics, 6 September 2018

³ West Midlands economic figures taken from the West Midlands Growth Company Quarterly Economic Digest, May 2018



Flights to over 150 direct destinations

Air connectivity

We currently offer flights to over 150 direct destinations and a further 340 one-stop global connections through the world's major hubs including Paris, Madrid, Brussels, Amsterdam, Zurich, Frankfurt, Munich, Istanbul, Dubai, Doha and Copenhagen. This gives our passengers a wide-ranging option of travel. In addition to our business travel routes, we reflect our regional diversity, connecting our communities to global cultural hubs with frequent flights to Delhi, Amritsar, Islamabad and Ashgabat. We provide access to a wide variety of outbound holiday destinations and are an important gateway for both inbound tourism and the rising numbers of overseas students at our region's universities.

We work closely with the business community across the region, including major corporates, the Chambers of Commerce and travel management companies, to understand their plans and make sure we are meeting their demand for additional destinations and frequency of service. We carry out extensive analysis of the destinations flown to by passengers based in the Midlands but departing from other UK airports, and use this to inform our future aviation strategy.

We have strong relationships with a wide range of airlines from each of the three leading airline alliances (Star Alliance, Oneworld & SkyTeam) serving domestic, short-haul and long-haul markets. We provide a diverse and balanced choice of scheduled, low cost and charter flights. Our aviation development team are ambassadors for the region, constantly engaged with existing airline partners and with potential new carriers to Birmingham, raising their awareness of the Midlands and focussing their attention on the opportunities to fulfil route demand from our region.

Looking ahead, we will continually develop our aviation strategy to take account of; developments in the regional and wider UK economy; which countries grow as key trading partners; and trends in the popularity of leisure destinations. This will reflect a proactive and expansionary strategy to build a bigger route network to serve our region. Our key priorities for future routes are focussed on:

- Direct long-haul services, particularly to the growth markets of the Indian sub-continent and China.
- North Atlantic routes, particularly with the emergence of low-cost long-haul airlines.
- More choice, connectivity and greater frequency of flights to European cities and the Middle East.
- Increasing the frequency of established routes to offer more passenger choice.

We will increase both the density and the frequency of our route network to provide more choice for passengers in our core catchment area, ensuring that we are their first choice for air travel. We will capitalise on our strong position in the centre of the UK, together with the rich demographic diversity of our catchment area and our broad range of airline partners.

Enhanced facilities to serve our passengers

Our £500 million development plan is aimed at expanding the Airport's facilities to meet forecasted demand, improve passengers' experience and improve efficiency for our airlines, handling agents and business partners. Over the period of this Master Plan, and particularly in the next five to ten years, the developments that will be most visible to our passengers will be:

- Extending the Departure Lounge to improve passenger circulation, increase seating capacity and toilet facilities, and enhance our retail offering, all aimed at meeting passenger needs and improving the overall customer experience.
- Extending the Security Area to increase screening capacity, improve operational efficiency and accommodate legislative changes whilst at the same time enhancing passengers' experience of the necessary security processes.
- Expanding and upgrading Check-in Bag-Drop and Departures Baggage Handling to improve speed and efficiency, reducing waiting times whilst also meeting more stringent security requirements.
- Increasing the number of aircraft stands from 58 to 69 to make better use of the recently extended runway capacity.

This ambitious and achievable investment programme will enable the Airport to meet and stimulate demand within our core catchment area and beyond. The successful execution of our Master Plan will enhance the current facilities providing a more efficient, comfortable and modern experience for all our passengers whether they are flying for business or leisure.

Customer experience

We know that a great customer experience is not only about our facilities but also how our staff operate every day to consistently deliver a great service.

During 2018, we have carried out a number of customer focussed upgrades to the terminal facilities and increased staffing levels and training, all with the aim of delivering the service our passengers expect. A primary focus has been on reduced queuing times: increased numbers of self-service check-in facilities have been installed; new departure boarding card gates have been added; parallel tray loading processes have been introduced to accelerate security processing alongside employing significantly more security staff; and in arrivals, new E-gates have been added to speed up passport processing.

As a result, this summer saw very positive passenger feedback and, building on this investment, we will continue to improve our infrastructure with an extensive programme of works planned even before our main terminal expansion project is realised.

We participate in an international Airport Service Quality (ASQ) survey, a benchmarking programme measuring passenger satisfaction across a wide range of airport processes at over 450 airports in 44 European countries.

Our Airport benchmarks well against our competitors, particularly for the helpfulness of our staff and those of our Airport partners. There are always opportunities to improve, and we are currently focussed on the areas in the table below to more consistently deliver a great passenger experience.

Customer experience focus

ASQ Measure	Action
Passport/ID inspection	<ul style="list-style-type: none"> • Five additional e-gates to accelerate clearance of EU passport holders • Border Force working group established
Waiting time in check-in queue	<ul style="list-style-type: none"> • Additional self-service check-in facilities • Measurement of performance and continuous improvement
Courtesy and helpfulness of security staff	<ul style="list-style-type: none"> • Customer service training programme and increased number of staff in front of house positions
Availability and cleanliness of washrooms/toilets	<ul style="list-style-type: none"> • Toilet refurbishment programme • Using real-time passenger feedback to attend to issues and optimise the cleaning regime • Improved signposting of alternative toilets
Waiting time at security inspection	<ul style="list-style-type: none"> • Parallel tray loading to accelerate processing and reduce queuing • New security preparation area for liquid disposal etc. • Additional automatic boarding card gates
Comfort of waiting/gate areas	<ul style="list-style-type: none"> • Additional lounge seating



We are committed to the highest standards of safety and security

We also specifically consider the Airport experience for people with reduced mobility or those travelling with children. Our new special assistance area was created to improve the processing and waiting environment for customers requiring assistance and we have also implemented best in class processes to help passengers with hidden disabilities. Our very popular family entertainment area 'Sky Zone' has also received a major upgrade and is equipped with the latest fun, interactive and educational equipment.

Safety & security

Airport safety and security requirements are subject to a range of statutory regulations, for example covering access controls, passenger and baggage search, safety on the airfield and in the area surrounding the Airport.

We are committed to the highest standards in safety and security to meet or exceed regulatory requirements and to provide a safe and secure environment for passengers, partners and employees across our site. As the Airport develops we will enhance safety and security through the design and operation of new facilities and infrastructure.

Airfield safety

UK airports operate in accordance with internationally agreed criteria and compliance is monitored by the CAA. We operate in accordance with the terms of a licence issued by the CAA and must satisfy the CAA's safety standards. The standards affecting the design and operation of airports are detailed in CAA publications including CAP168, CAP738 and CAP791.

Aerodrome safeguarding

Local planning authorities consult us on any planning applications that may have an impact on the safety of the Airport operation. This process is known as aerodrome safeguarding and is intended to:

- Ensure that the Airport's operations remain safe from proposed developments (for example tall buildings) which might infringe the Airport's protected airspace.
- Ensure that pilots on approach to the Airport can see the runway lighting.
- Protect the accuracy of radar and other electronic aids to air navigation.
- Reduce the hazard from bird strikes to aircraft engines by reducing the likelihood of bird activity, for example near water or refuse sites.

Public Safety Zones

The risk of air accidents occurring as aircraft arrive at or depart from the Airport, while extremely low, is such that the use of land at the ends of the runway is restricted. These designated areas are known as Public Safety Zones (PSZs). The Government aims to ensure, through planning policy, that there is no increase in the number of people living, working or congregating in PSZs and that, over time, the number should be reduced as circumstances allow.

Community responsibility

We take our community responsibilities seriously and work closely with local residents and the Airport Consultative Committee and on a wide range of other projects and initiatives.

Inclusive growth

We currently provide, directly or indirectly, 6,700 jobs on the Airport site, but in addition we believe the economic benefits the Airport brings to the wider region should reach our whole community, particularly those living in some of the most deprived areas nearby in East Birmingham and North Solihull. We invest proportionately more of our resources in these communities, for example with 24% of our Community Trust Fund being deployed in East Birmingham and 23% in North Solihull.

The National Planning Policy Framework identifies three objectives to achieve sustainable development, economic, social and environmental, which need to be pursued in mutually supportive ways so that net gains can be secured across the different objectives. Our economic contribution has been covered in the 'Economic Accelerator' section. Our approach to the social and environmental objectives is to develop specific areas of focus that demonstrate our commitment to minimising the negative aspects of our operations and maximising our economic and social value.

Social

We strive to make a practical contribution to the wellbeing of the communities we serve, and to promote mutual trust and understanding with our key local stakeholders.

Our Community Trust Fund makes awards to small, community-led organisations in affected areas. An index-linked annual contribution (currently standing at £84,000) is topped up by fines paid by airlines who are in violation of our night noise limit. The annual contribution is then distributed by a board of nine independent trustees. Since the Fund's inception, a total of £1.54 million has been awarded to over 700 local projects.

The April 2018 grants typify the range of projects supported and included contributions towards the refurbishment of the church hall kitchen at St Cuthbert's in Castle Vale, tents and cookers to support the Duke of Edinburgh Award Scheme at Lyndon School in Solihull and the planting of shrubs and bulbs at Hill Hook Local Nature Reserve in Sutton Coldfield.

Our education programme seeks to raise aspirations and levels of achievement by focussing on work-related learning and employability skills. The Learning Hub – the dedicated education facility we operate in partnership with The Schools of King Edward VI in Birmingham in the terminal building – offers a unique environment in which these activities can take place. In 2017/18 we welcomed more than 80 groups and over 2,100 young people.

We support graduates, interns and apprentices in gaining valuable experience of the aviation industry. Our programmes give young people the chance to get hands-on experience. We are committed to an inclusive employment policy and, working with local authorities, on-site partners and organisations such as The Prince's Trust, we support projects to connect disadvantaged young people to job opportunities at the Airport.

Environment

Managing noise is our top priority and we have implemented a comprehensive Noise Action Plan to address issues of noise and track-keeping, noise monitoring and community complaints about aircraft noise. We have also embedded the practice of continuous descent approaches which is an aircraft operating technique designed to reduce fuel, air emissions and noise.

The noise footprint is forecast to impact around 6% more people in 2033 than today. This is significantly lower than the previous Master Plan due to a combination of lower than forecasted passenger volumes, airlines using fewer, larger aircraft, and significant advances in aircraft engine technology.



Sky Zone

Our interactive play areas for young passengers

Our Sound Insulation Scheme makes up to £3,000 per household available for insulation against aircraft noise. More than 7,600 residential properties has been insulated under the scheme. That boundary is defined by the 63dB(A) Leq Summer Noise Contour, which in recent years has shrunk as new technology has introduced quieter aircraft. Despite this, we insulate properties that lie within the contour as it stood in 2002.

We have listened to our neighbours to understand attitudes to aircraft noise and, in partnership with community representatives, have developed a new night flying policy which is among the most stringent in the UK. This approach has enabled us to balance commercial pressures with the needs of the community, who benefit from some significant new and targeted restrictions on night time operations.

We take our environmental responsibilities very seriously across all other areas such as carbon reduction, water and waste. We are striving to become much more carbon efficient and despite the growth in passenger numbers, since the last Master Plan we have seen the amount of CO₂ generated per passenger falling by almost 43% and overall carbon emissions down by over 21%.

We understand our role in the wider community and are committed that alongside our growth we will continue to avoid, reduce or mitigate where possible, the environmental impact of our operations. This will include continuing to reduce our carbon footprint as well as providing noise insulation for local homes.

Making best use of our existing runway

This strategy is consistent with the Department for Transport's policy of making best use of existing runways⁴. The only new runway that commands Government policy support is the third runway at Heathrow. The proposed major increase in our investment plans reflects a focus on ensuring that Birmingham's facilities and aviation strategy maximise the potential of the existing site and runway – these are amongst the most valuable assets of our region.

The runway has the physical capacity to handle at least 25 to 30 million passengers per annum, compared with the 13 million passengers a year that use it today and the 18 million passengers we are forecasting for 2033.

Our strategy relies upon three conditions being met. Firstly, as we approach the end of this Plan (around 2030), we believe that more land will be needed if we are to continue to make the best use of our single runway. Secondly, steps must be taken to resolve airspace constraints in the south east that currently limit the number of aircraft departing from Birmingham bound for key European destinations. Thirdly, further Government investment in the region's road and rail infrastructure will also be necessary. Provided these steps are taken, we do not foresee a need for another runway for some considerable time to come.

The Airport's need for additional land relates to an anticipated shortage of aircraft parking stands along with other ancillary facilities. The process of acquiring the land, obtaining planning consent and commencing construction arises within the 15-year period of this Plan, albeit towards the end of our planning horizon. Moreover, if demand for air travel grows more quickly (perhaps in line with our high case forecast set out in Appendix C), then the need for these facilities will come forward in time. We currently estimate that around 20-40 hectares (up to 11% of the current site) is required. The preferred location for 8 hectares is the current NEC west car park adjoining the Airport site. The remaining 12-32 hectares is most likely to be required on land south of the A45 between the Elmdon side of the Airport and the Jaguar Land Rover factory or some similar nearby location. The Airport may need to invoke its compulsory purchase powers to acquire suitable land which is not already in its ownership.

An active player in the Midlands transport strategy, we collaborate with regional government and other organisations to ensure current surface transport infrastructure continues to develop to meet the growth expected in the region and to promote the greater use of public transport. For example, we work closely with Midlands Connect to help them deliver

their 2017 Strategy which sets long-term transport investment priorities for the Government to unlock growth and jobs across the region through improved, regional and global connectivity.

We aim to maximise the benefits of our proximity to the key national rail and road networks, including HS2, and enhanced public transport links in the Midlands.

If the Airport is to reach its potential and serve the growing air travel demand in the region it is essential for key improvements to be made to public transport and road connectivity to the Airport. Specifically, this will require:

- An effective replacement people mover from the HS2 interchange station.
- The release of capacity on the West Coast Mainline, arising from HS2, for more regional train services to the adjacent Birmingham International Station and more early morning services.
- The completion of new Metro and Sprint services from Birmingham city centre.
- A new junction on the M42, to relieve the chronic congestion on the motorway network, and a further study to determine the need for additional capacity on the M42 itself to support regional growth.

Current work by the Department for Transport, the Civil Aviation Authority and National Air Traffic Services (NATS) is underway to modernise UK airspace and alleviate the lack of capacity over the south-east which is currently restricting the number of departures from Birmingham. This is essential if the Department for Transport's stated policy of maximising use of existing runways is to be a reality.

⁴HM Government: Beyond the horizon, The future of UK aviation – Making best use of existing runways, June 2018

**Proposed HS2
Interchange Station**

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Birmingham Airport's Master Plan is a crucial part of the region's integrated growth and investment strategy for improved transport links and infrastructure. The partnership between HS2 and the Airport will deliver increased connectivity that will in turn drive economic growth for the region and beyond.

Mike Lyons
Programme Director HS2 Ltd



Credit: HS2 and Arup