



LoCATE

LONDON CENTRE FOR AVIATION
TECHNOLOGY AND ENTERPRISE

THE CASE FOR GROWTH



London Biggin Hill has emerged as a **leading business in the South East** and is one of the **most important pioneers of the business aviation sector** in the UK... it is proving a **very sound investment** for those choosing to base there

FARRELLS

Sadiq Khan, Mayor of London

FOREWORD



Biggin Hill Airport is London's specialist business airport, the only one of its kind within the M25. It provides convenient access to the West End, the City and Canary Wharf. The airport accounts for 20% of business aviation traffic in the metropolitan region. It consists of a cluster of high value businesses engaged in aviation services, manufacturing and technology, as well as providing global connectivity for a very high value sector part of the aviation industry.

As a successful private public private partnership, which in 2011 was designated as a Strategic Outer London Development Centre (SOLDC) by the Mayor of London,

the airport has ambitions to transform its estate to become an exemplary business airport for the 21st century in London.



Andrew Walters
Chairman
London Biggin Hill Ltd



As part of our work for London Biggin Hill Airport we have studied the place-based economic benefits of encouraging the growth and modernisation of the airport and its infrastructure. This work shows that more investment will strengthen the local economy, provide an economic boost to the London Borough of Bromley and play an important role in helping London and the UK to compete effectively in global markets.

More importantly, the economic effects will be felt throughout South East London, which has great potential as a place for future growth and investment.

The airport has shown in recent years that it has the willingness and ability to invest in the airport estate and to attract new jobs. In this report we show how the airport plays an important specialist role within the metropolitan aviation network – the world's most successful. It describes the significant contribution to the local, metropolitan and national economy. It describes the airport's vision for its future, and then puts forward a collaborative approach to achieving future success involving continuing dialogue with local communities and other key stakeholders.

Our studies, along with work by the airport's team of experts, shows that Biggin Hill Airport, a place with a rich heritage, can become an exemplary specialist airport that does this great city of ours proud in coming years.



Sir Terry Farrell CBE

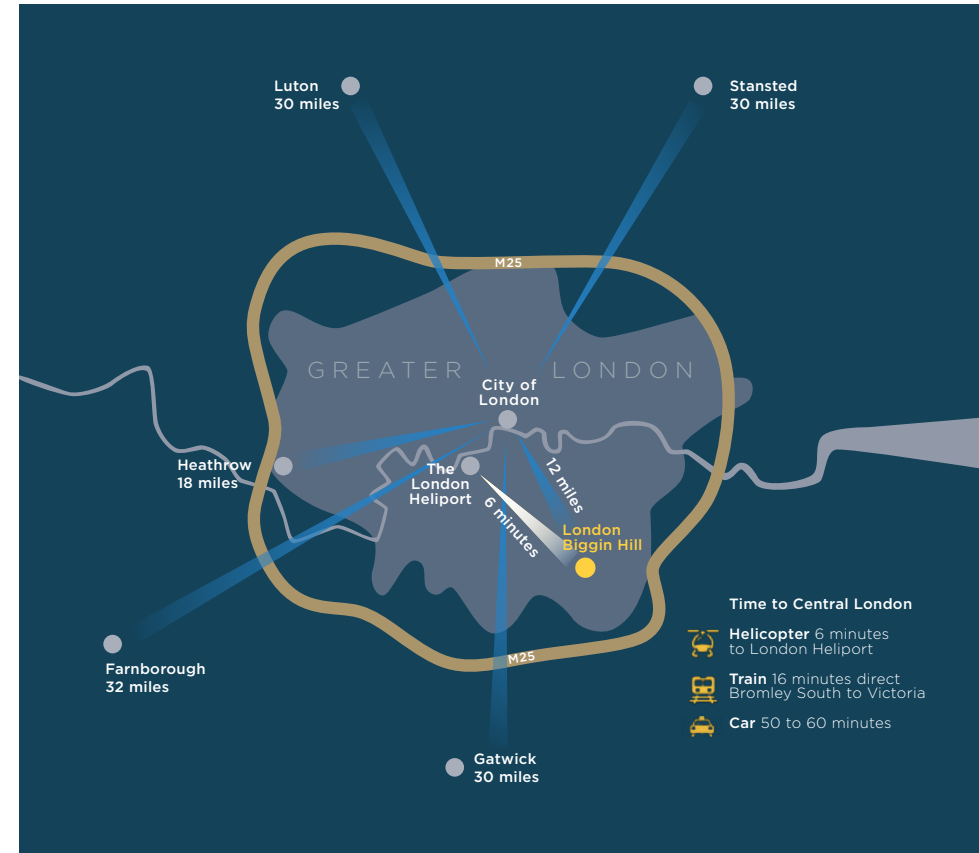
LoCATE (London Centre for Aviation, Technology and Enterprise) is a partnership of public and private sector organisations promoting Biggin Hill Airport as a centre for the aerospace industry in London.

Over the last decade Biggin Hill has undergone tremendous growth and is today the fastest growing business aviation airport in the UK. More than £60 million of private investment in new hangars and infrastructure has attracted global business and there are today over 70 companies employing more than 1,300 people on the 500 acre site, generating a turnover of nearly £230 million and more than £70 million in GVA. As a result Biggin Hill enjoys a first-rate reputation as a Business Aviation centre of excellence in the UK (ranking amongst the top 15 in Europe).

LoCATE provides a unique space for aerospace professionals to conduct operations, management and maintenance at the heart of a global city; Biggin Hill is inside the M25, with good rail, road and helicopter links into Central London, as well as Ebbsfleet for the high speed European rail network.

LoCATE promotes the vision of a sustainable future for Biggin Hill, which both honours its history and secures a promising future, creating jobs and training a new generation for the UK aviation industry.

We have a strong case for growth.



12 miles
to Central
London

Six
minutes to
London
Heliport

70
companies
with
+1,300
employees

Established in 1917,
the airport celebrates
more than a century of
history, characterised by
innovation, technological
change and gradual
evolution...

Biggin Hill is
a **successful**
public
private
partnership

The airport
has invested
£60 million
since 1994

A hub for
education,
training, and
manufacturing

A modern
airport **proud**
of its **heritage**

1917	1930	1940	1950	1960	1970	1980	1990
Opened by Royal Flying Corps in 1917 Hosted Bristol squadron in WW1	Used as experimental base for new technologies during interwar period	Command base during WW2 Airfield attacked 12 times during Battle of Britain	Important aircraft base during Jet Age RAF Officer and Air Crew Selection centre from 1958-1992	Increasing flying clubs activity	Purchased by London Borough of Bromley in 1974	Increased private commercial activity	RAF moved to Cranwell in 1992 Airfield leased to Biggin Hill Airport Limited in 1994

2000	2010	2015	2017	2018	2020	2021	2022
2000 legal ruling ensures no scheduled flights at Biggin Hill	Airport signs MOU with Teterboro 2011	Airport permitted extended opening hours	Bombardier relocated from Amsterdam to London Biggin Hill	Terminal Hangar 2 complete	Mansi Testing Suite - The first on-airport Covid-19 test centre in the UK	The Landing at Biggin Hotel construction commences	Bombardier will open a brand new 260,000 sq ft hangar facility

OUTLINE

1 Biggin Hill Airport is **London's specialist business airport**
- it supports **London's success and improved connectivity**

2 Biggin Hill Airport makes a **significant contribution to the**
local, metropolitan and national economy

3 Biggin Hill Airport has a **clear vision for sustainable**
growth - with strong local support

4 The way forward is a **collaborative approach to support**
Biggin Hill Airport's future success

The London Heli Shuttle:

Biggin Hill to The London Helipad
in just six minutes.





1

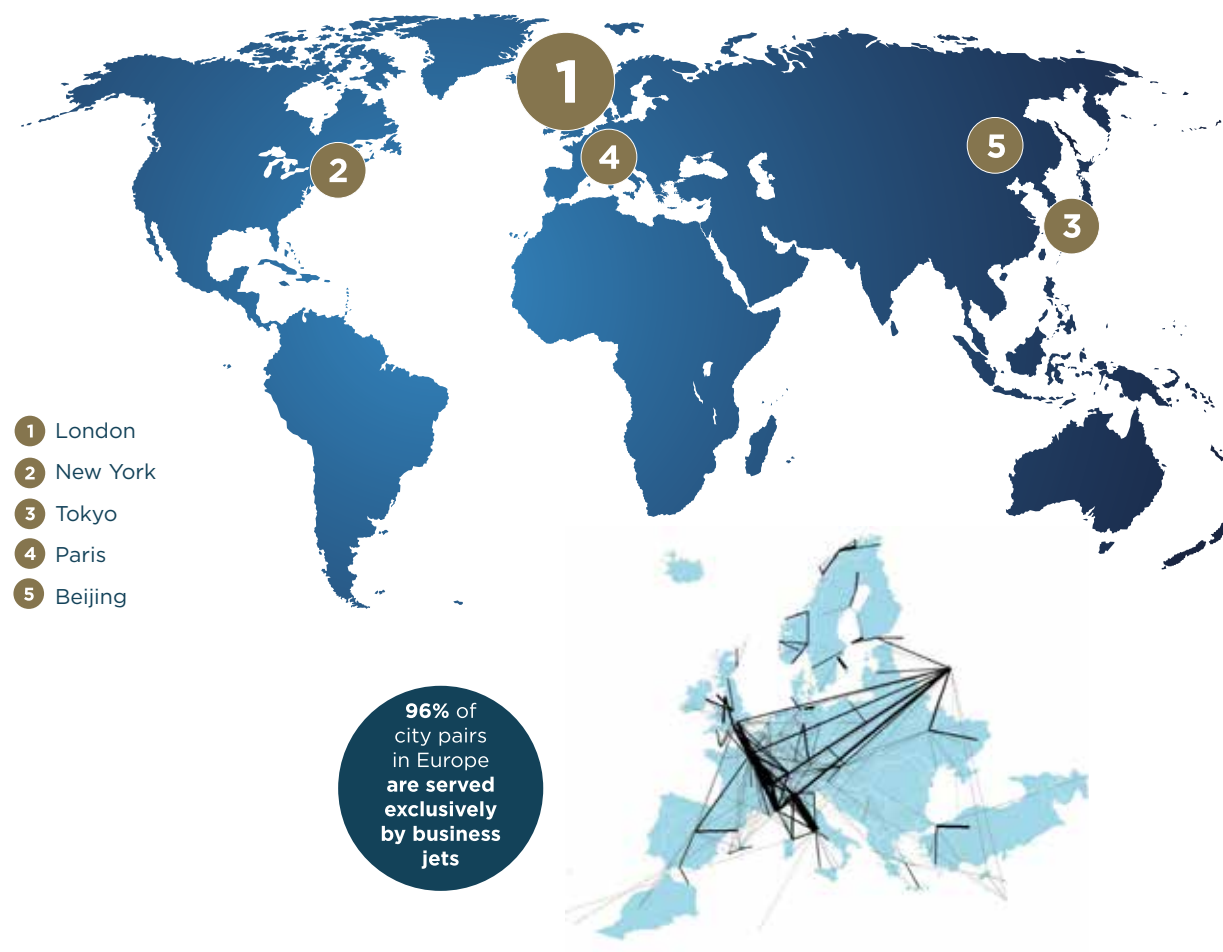
The big picture: Biggin Hill Airport plays an important specialist role within London's successful aviation network

“

a growth in scheduled traffic at airports with a large share of the current business jet market may create pressures over time for business jet users... **The Commission is supportive of the reliever airports concept** - this may be the best way to cater for the needs of business users without disrupting the wider airport system”

The Airports Commission Interim Report, December 2013

London has the world's most successful aviation network



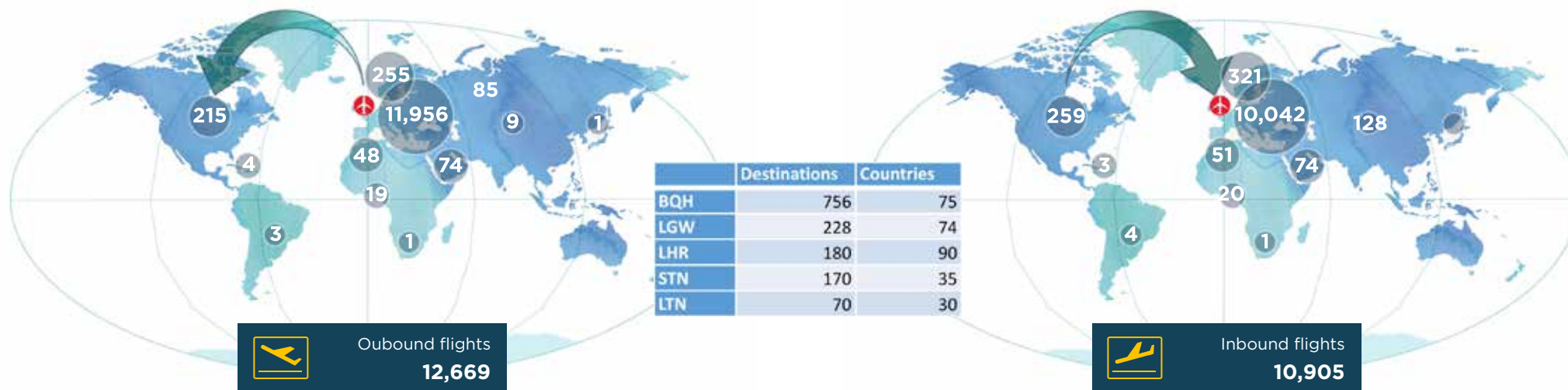
London has the largest metropolitan aviation network in the world serving the greatest number of destinations. It caters for more passengers per annum than any other city (170 million in 2017).

The number of global business aviation flights is forecast to grow faster than the scheduled airline sector. The emergence of business aviation is a growing trend in response to a surge in demand for more city-pair links in an era of intensifying global business transactions. Direct connectivity offers unique flexibility to global political and business leaders; 96% of city pairs in Europe are served exclusively by business jets. In an average year, Biggin Hill Airport has flights to or from around **750 different places** – almost three times more direct connections than any scheduled flights at any of the other London airports.

London Biggin Hill is the only dedicated business aviation airport actually in London. Business aviation is a hugely important part of the global aerospace economy, and by tapping into that market, Biggin Hill is attracting significant new foreign investment to London.

Biggin Hill provides global business connectivity

Biggin Hill is the second largest business aviation airport in the UK, and the fastest growing business aviation airport in the UK. It has 23% of London's market share after Farnborough (31%) and higher than Luton (22%)



- Biggin Hill typically connects flights to over 750 destinations across over 70 countries
- Biggin Hill Airport serves five continents – modern business jets provide global reach.
- Over 90% of destinations are in Europe and 5% are long haul.
- Biggin Hill ranks among the top ten airports in Europe for number of business aviation movements.

Biggin Hill has made more connections than all the scheduled London Airports put together

London's success is based on its airports constellation

By 2030, Heathrow, Gatwick, London City and Luton will all be full, with Stansted not far behind. Airport infrastructure in the South East is simply not growing fast enough to meet the huge surge in demand.

In the US, high capacity "reliever airports" handle business aviation traffic and free up more slots at scheduled airports in major metropolitan areas. Teterboro (Biggin Hill's sister airport) is one such base, and today is North America's leading business aviation airport, providing reliable and congestion free infrastructure just 12 miles from Manhattan.

Biggin Hill is the only dedicated business airport inside the M25 with enough capacity to meet growing demand. LoCATE offers the potential to secure a higher market share of the London market consistent with our proximity to the City.



“

Government policy should promote the benefits of smaller airports in the London and South East system for accommodating business and general aviation... local authorities should support the development of smaller local airports and, alongside consideration of their environmental impacts, also give due consideration to the positive benefits they can bring to the local and regional economy.

Sir Howard Davies

Dedicated business aviation airports



TETERBORO, New Jersey



BIGGIN HILL AIRPORT, London



LE BOURGET, Paris



SELETAR AIRPORT, Singapore

Biggin Hill is the fastest growing business airport in the UK

FARRELLS

Aviation is critical to the United Kingdom's economic success

Aerospace



More than **400** global destinations are connected to London alone



Aviation contributes **£52 billion** annually to GDP



Aviation supports **almost one million** jobs in the UK



GVA contribution per employee is **£84,000** – three times the national average



UK aviation exports amount to **£27 billion** per annum

Business Aviation



164,000 workers employed in business aviation in Europe



80% of private aviation flights are commercial, 20% are leisure



700,000 business flights in Europe – 7% of the total



96% of business flights in Europe serve cities with no scheduled flights



Each passenger on a business flight **contributes nine times more GDP**



Business aviation contributes **20% of GDP** to the aviation sector within Europe



Business Aviation is a **£3bn sector**, second only to US



UK MRO sector accounts for nearly a **fifth of the global MRO industry**



Business aviation to deliver **8,000 new business jets** in next decade average



BH, FAB, OX account for **fifth of UK market**

The UK is **second** after the **US** in aerospace.

Aviation provides global connectivity, innovation and new technology, as well as high value employment to 961,000 people in the UK. Business aviation contributes 20% of GDP to the aviation sector within Europe and is one of the most high-value sectors in the UK. Although the number of passengers using business aviation is comparatively very low, they are **nine times as valuable** to the UK economy as a commercial airline customer.

2

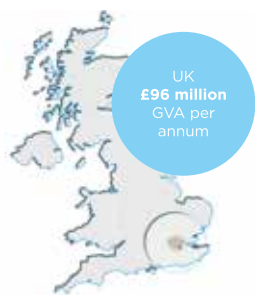
Biggin Hill Airport makes a significant contribution to the local, metropolitan and national economy



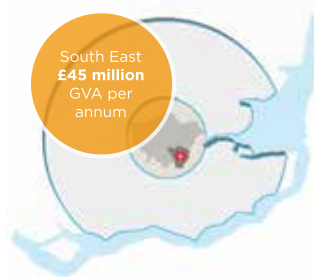
Biggin Hill Airport makes a significant contribution to the wider economy

Growth at Biggin Hill will transform the local economy while reducing its environmental impact. There will be almost four times the number of high value jobs at the airport – creating wealth for communities in the LoCATE sub-region. Turnover is predicted to double to £500 million, and GVA will treble to £270 million by 2030. This will precipitate additional business rate revenue of £2.1 million per annum by 2030, and Community infrastructure levy payments of £3.8 million. This uplift in jobs and regional income is highly beneficial for LoCATE and the surrounding areas.

The airport contributes to the **UK's success...**



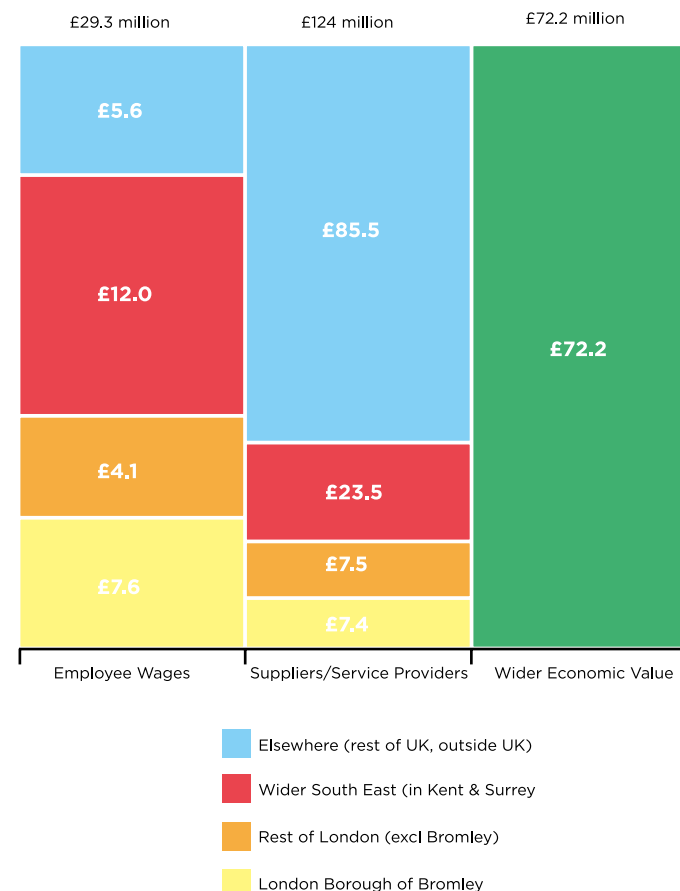
...to **metropolitan London's success...**



...and to the **LB of Bromley's success**



Total Turnover = £225.5 million



The airport is a growing magnet for high value economic activity

Bombardier Business Aviation Full Services Centre



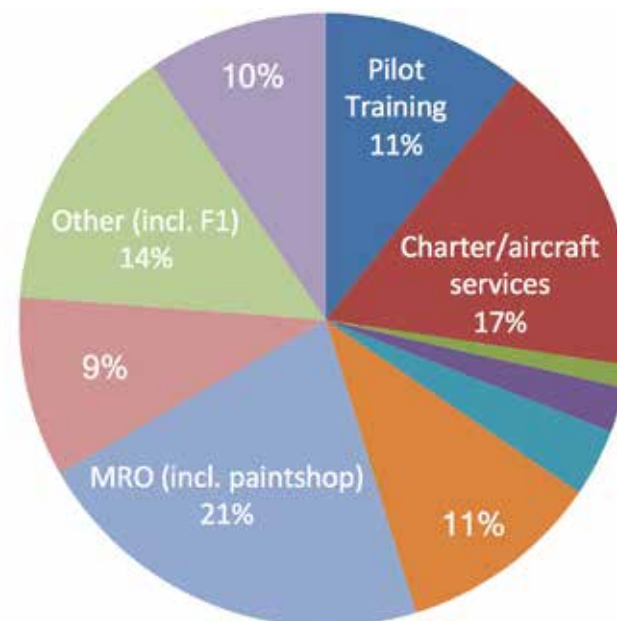
“ Our investment in Biggin Hill has been a tremendous success, affording us the opportunity to grow our presence in the most influential and productive business aviation location in the UK, London & the South East.

Castle Air Charter Services Engineering and Training



“ Our investment in creating a Castle Air showroom and service centre at Biggin Hill is a tremendous success. Biggin Hill has proved to be the ideal location by both our customer and employees alike, affording us the opportunity to grow our presence in the UK, London & the South East.

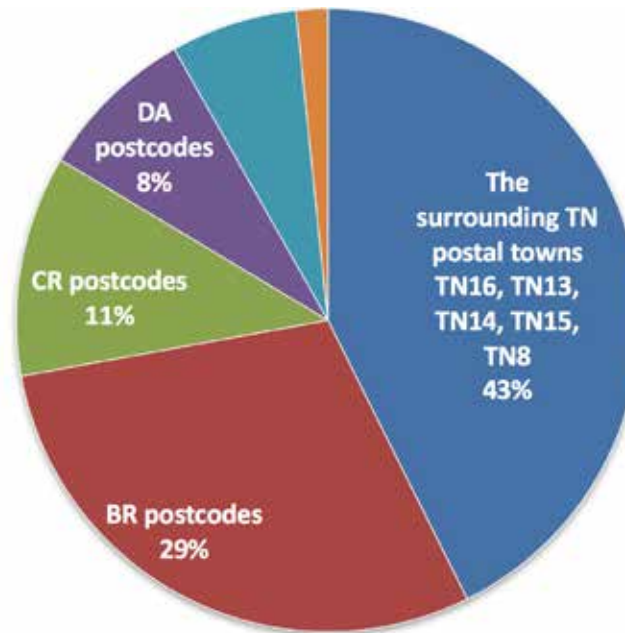
Distribution of companies at Biggin Hill by (number of people employed)



Biggin Hill Airport is becoming a global centre of excellence that provides high value local employment...

The airport makes a significant contribution to export services...

providing high productivity local jobs
- over 65% of employees are local



The airport's growth plans have an estimated job creation potential of 3000 new jobs by 2031, including high value apprenticeships.

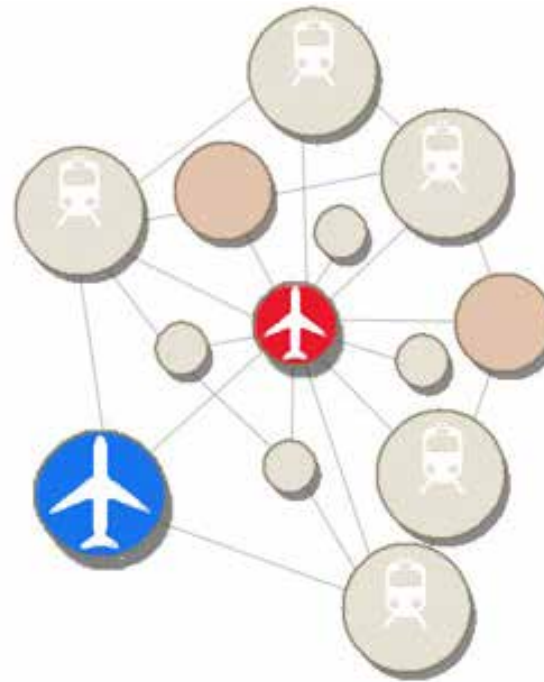
Biggin Hill is an important source of employment locally, with two thirds of employees based in neighbouring communities.

Productivity levels (as a measure of GVA per employee in a given economic area) at Biggin Hill are predicted to reach levels of more than 40% above the borough average (£70,000 per employee compared to borough average of £43,295).

Growth at Biggin Hill Airport represents a once in a generation opportunity to create a networked aviation cluster in SE London



Supporting **success** in
South East London



Creating a network
aviation cluster in SE

Growth at Biggin Hill will invigorate London's 'empty quarter' - South East London.

Growth will also stimulate the sub-region and compliment high investment levels in Croydon (Whitgift) and Paramount in North Kent.

It is a means to further boost employment in neighbouring areas, like New Addington, where levels are relatively low.

There is an opportunity to stimulate local business areas - including in Croydon and Sevenoaks, through the possible creation of a second Enterprise Zone for London.

LoCATE is within a 60 minute drive of 36 universities and nearly 1000 engineering and technology graduates, and an 80 minute public transport commute of over 5 million people.

3

**Biggin Hill Airport
has a clear vision for
sustainable growth**



LoCATE: a totally unique business strategy



A London Gateway for business with competitive opening hours, all weather landing aids, Border Agency on site, a convenient London Location and nearby international rail and air services.

An Aircraft Home Base for aircraft owners, aircraft management companies and industry customers, such as Formula One base it at London Biggin Hill.

A Manufacturers Service Centre providing facilities for aircraft manufacturers and agencies, supported by a Training Centre and engineering apprenticeship schemes.

Biggin Hill Airport wants to build on recent achievements to make the most of the site's potential...

In addition to a unique long term strategy, the airport has worked for short term gains to secure its future as a world class business aviation centre of excellence. These include new investment in hangars and a hotel, extended opening hours, approved with the support of the local community, and changes to the flightpath procedures to continue reducing environmental impacts.

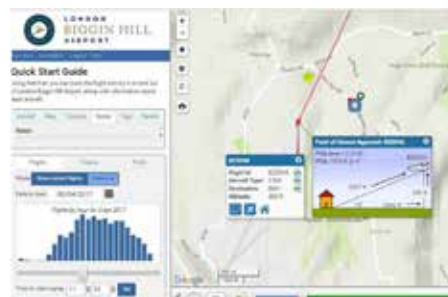
- 1 The airport has achieved extended operating hours



Flights can now operate from 06:30 to 23:00.

Only the quietest aircraft will be able to use the runway at the earlier and later times.

- 2 A comprehensive Noise and Track Keeping System, as well as a new all weather landing system



Southerly approaches will become quieter.

Flightpaths will be more fuel efficient.

- 3 We will open a new hotel and invest in new infrastructure



A new on-airport hotel will be open in 2022.

The airport will be making operational improvements that reduce environmental impacts.

The airport's vision is **continued gradual evolution of the airport to become a world class business airport for London**

In order to continue to realise the full growth potential of Biggin Hill Airport, the spatial planning aspect needs to be commensurate with market demand. Biggin Hill is uniquely positioned to grow, and carefully planned floorspace on the site will translate into more high value, specialist industry jobs for local young people.

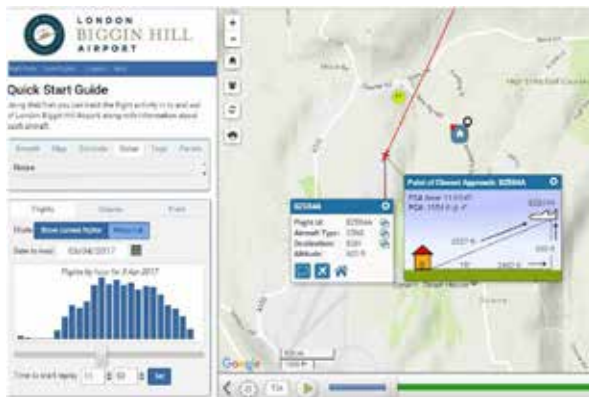


Biggin Hill Airport is investing in the latest technology - the airport has the most robust noise strategy with **strong local support**

LoCATE is committed to securing local public support for its growth plan. This emphasises job creation over increase congestion, and higher value flights over more flights.

Biggin Hill has invested hugely in technology to provide residents full accountability of the airport's movements. These mitigation measures have won the airport considerable support in the community.

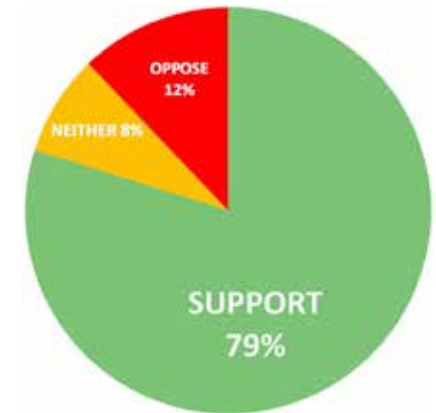
In 2015, the widest ranging consultation in London Borough of Bromley's history won 79% support from locals, on account of the careful balance of sustainable business growth alongside environmental protection, as well as through preservation of our rich heritage, through the annual festival of flight and other community engagement efforts.



Installation of state of the art noise monitoring and track keeping system (NMTKS) means that residents are able to identify and track every aircraft movement.



New GPS landing system for southerly approaches will reduce the airport's noise impact.



15,000 residents were consulted in 2015 – two thirds supported extended operating hours.

4

The way forward: a collaborative approach to Biggin Hill Airport's future success



A child with light brown hair, seen from behind, is looking out of a large window at an airport tarmac. The child is holding a small red toy airplane in their right hand. Outside the window, several aircraft are visible on the tarmac, including a large white jet in the foreground and a smaller propeller plane further back. The scene is bathed in the warm, golden light of late afternoon or early morning.

LoCATE is engaging with **dti** **GOV.UK** **GREATER LONDON AUTHORITY** **Transport for London**

to deliver a sustainable strategy for Biggin Hill

Years of careful planning and investment has led LoCATE to become a leading player in business aviation, giving Biggin Hill Airport a **hugely promising future**. But in order to achieve the full potential of our growth plan – the jobs, the uplift in GVA as well as the preservation of an environmentally conscientious historical site – LoCATE is seeking to **secure the support** of the local and regional authorities.

The following pages outline a specific set of “asks” to be considered, in order to facilitate effective, meaningful and long-term growth at Biggin Hill, so that the full benefits outlined in this case for growth can be realised.

Support business aviation nationally and internationally – in the interests of exports and global connectivity

1

Promote **inward investment** and **export services** focused on business aviation



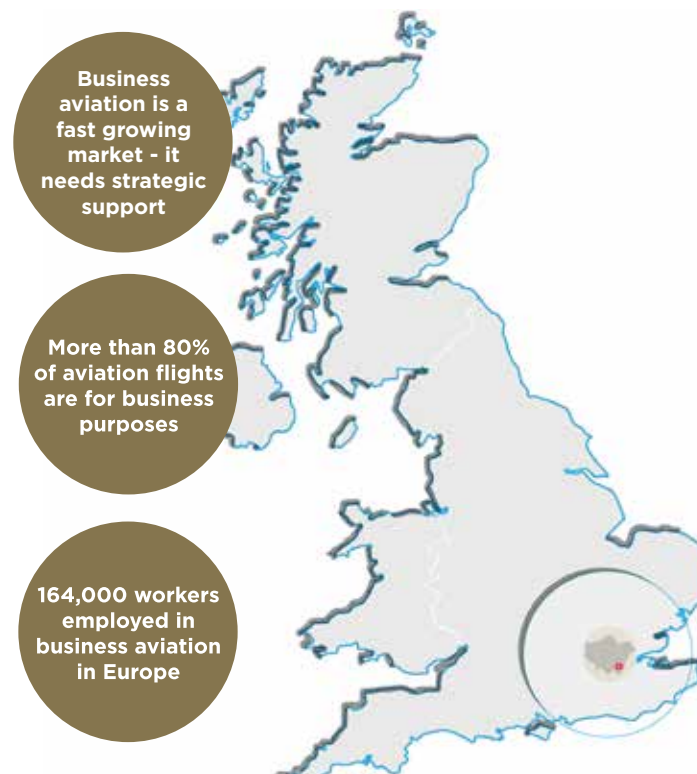
“

I was very pleased to learn of the positive progress with Biggin Hill Airport's diverse aviation business activities, as well as the Greater London Authority's recognition of the centre as a Strategic Outer London Development Centre. I also warmly welcome the airport's ambition” *Rt Hon Chris Grayling MP, Secretary of State for Transport*

FARRELLS

2

Align **government aviation policy** so that it reflects the **strategic importance of business aviation**



Factor the value of the aerospace industry into strategic planning around the London and South East region

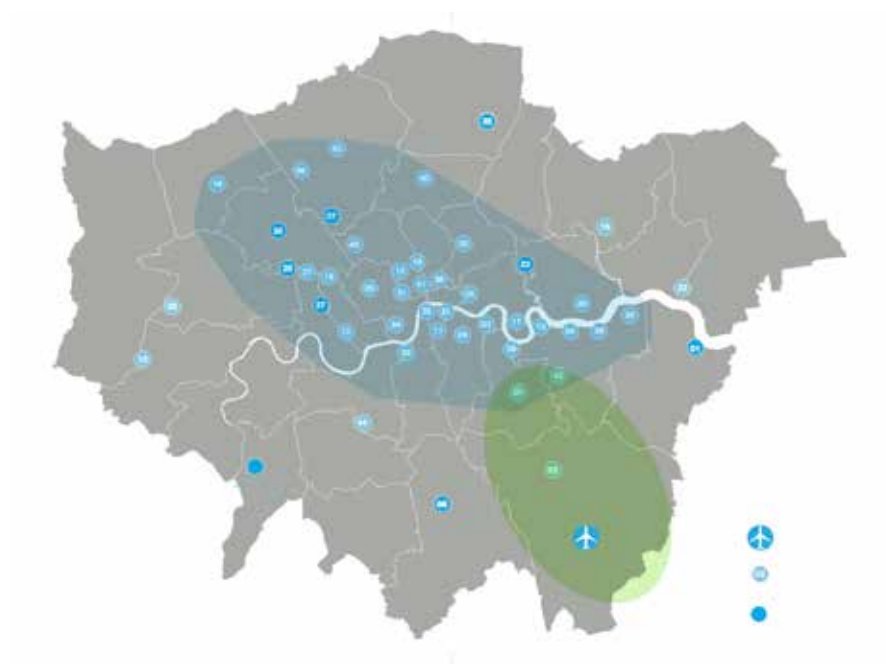
3

Provide government support for Biggin Hill as **London's only specialist business airport**



4

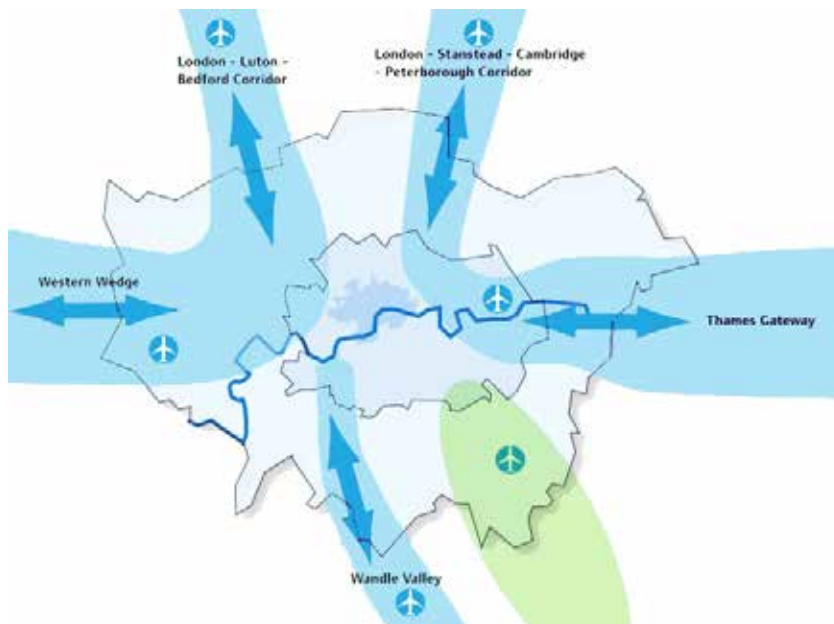
Reinforce Biggin Hill Airport's designation as a **Strategic Outer London Development Centre** in the new London Plan



Acknowledge Biggin Hill Airport's significance in the new London Plan – and London's infrastructure plan

5

Support South East London – the city's 'empty quarter' – as a **growth corridor**



6

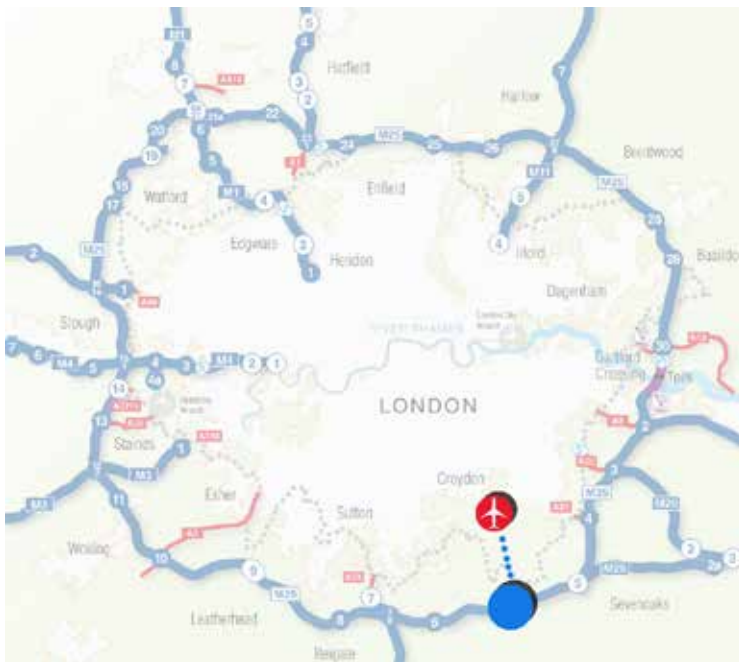
Re-balance investment in the road network to support **productivity and growth** in South East London



Facilitate lasting and sustainable infrastructure for the region to enhance the value of Biggin Hill Airport

7

Create **better access to the M25** to support new investment and growth in South East London, Kent and Sussex



8

Extend the **Bakerloo Line to Hayes** – this will transform South East London's accessibility



Provide local policy and investment support...

9

Align the policy environment to **support future investment and employment growth** at Biggin Hill Airport



Improve public transport accessibility



Support Biggin Hill as Bromley's largest high value employer

10

Support the strategic realignment of Green Belt to capitalise on the airport's growth potential within the airport boundary



London Green Belt

Land proposed for release from London's Green Belt

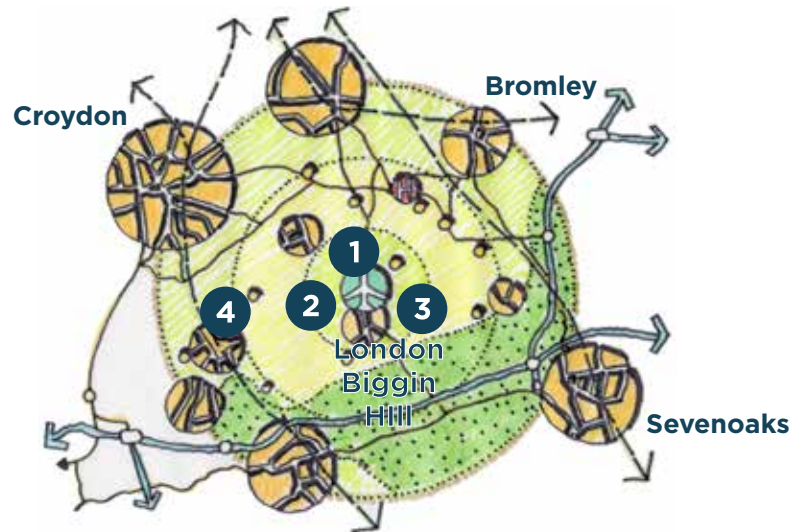
“A Green Belt Review undertaken by independent specialist landscape consultants concludes that the entire Airport could safely be released from Green Belt since the land does not fulfil the purposes of Green Belt to the extent that it should be protected in line with National Planning Policy Framework”

Nathaniel Lichfield & Partners, 2016

Retain Biggin Hill Airport's SOLDC status to optimise the value of improved surface access and training for young people

11

Enhance the **local road network** to provide better visitor and employee access to the airport



- 1 Invest in the A233 to improve access to Bromley and Orpington town centres.
- 2 Upgrade road infrastructure and public transport to Vulcan Business Park.
- 3 Improve the road network to improve access to Fort Halstead.
- 4 Improve the road network to improve access to Croydon.

Biggin Hill Airport is a dynamic airport community – it is strongly placed to achieve the Case for Growth

“Enhancing our service and support in the UK is a top priority, as our aircraft installed base in the region is significant and growing. This expansion establishes our presence in the London area”
Bombardier Business Jets

BOMBARDIER
the evolution of mobility

 **ZENITH**
AVIATION LIMITED

RAS

AVALON AERO

Centrik
YOU HAVE CONTROL

**SOVEREIGN
BUSINESS
JETS**

CASTLE AIR
GROUP

 **IntoTheBlue**
Experience Gifts & Memories



AATS

 **catreus**

Signature
FLIGHT SUPPORT
A BBA Aviation company

 **Oriens**
AVIATION



luxaviation^{CM}
UNITED KINGDOM

 **AIR CULINAIRE**
Worldwide | Providing In-Flight Catering

ARENA

Formula 1

1AVIATION.CO.UK
we love flying

TEXTRON AVIATION

 **VOLUXIS**



FARRELLS

One of the fastest growing and best connected business airports in the UK, LoCATE uniquely positioned for growth. This brings with it huge benefit to the local community and London economy. This is the time to invest in LoCATE.



Since Biggin Hill Airport became a public private partnership in 1994, it has invested millions on improving the airport facilities and infrastructure. In the last two years it has attracted investment from world class business aviation companies including Bombardier, Pilatus, Textron Aviation and Signature Flight Support.

The airport is now ready to embark on the next stage of its journey. The increase in operating hours has transformed its ability to attract high value investment from other global players. In a rapidly changing global market, it needs close collaboration and support from all stakeholders – public and private – to bring its vision of the airport as a global exemplar for business aviation to fruition.

For more information about LoCATE, please contact:

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