

Noise Management Board (NMB)

NCF/2

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Chair NMB Delivery Group

23 September 2020

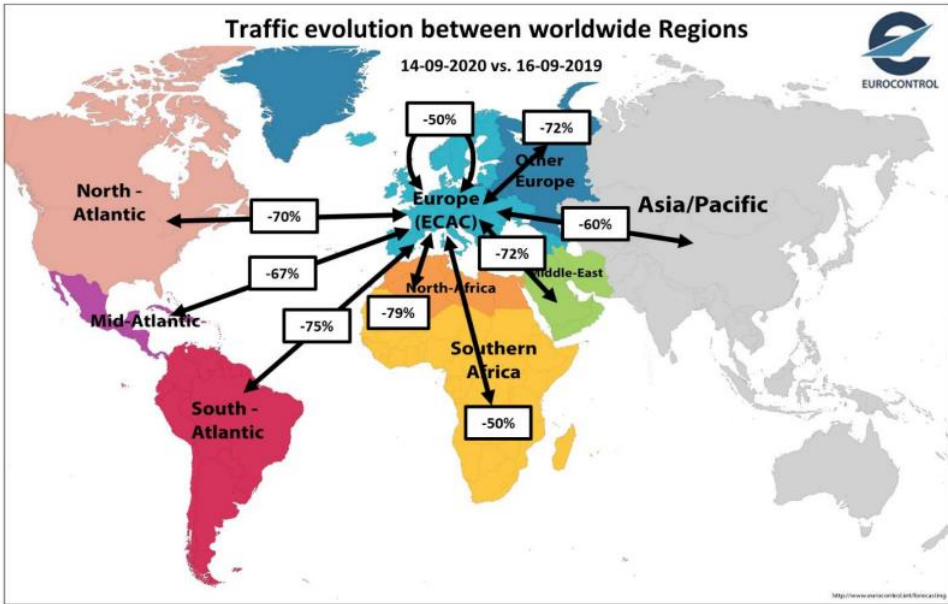
Membership

- NDG Chair/NEX Secretariat
- GAL and its advisers (e.g. Helios/ERM/Trax etc. as required)
- NATS – Air Traffic Management, En Route & Approach
- ANS – Air Traffic Management, Tower
- Airline representatives
- CAA – Aviation Regulator
- NaTMAG – Noise & Track Monitoring Advisory Group

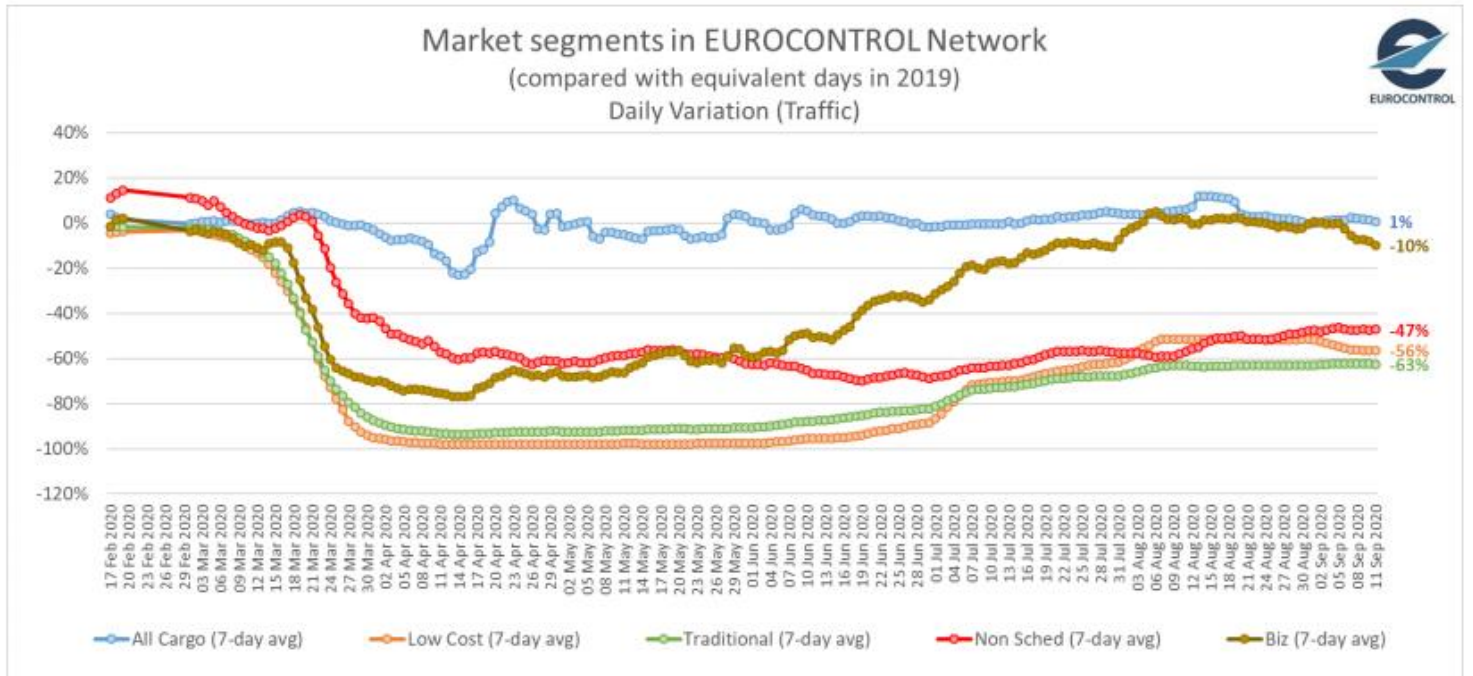


Context

Covid-19 - What has happened to the number of flights?

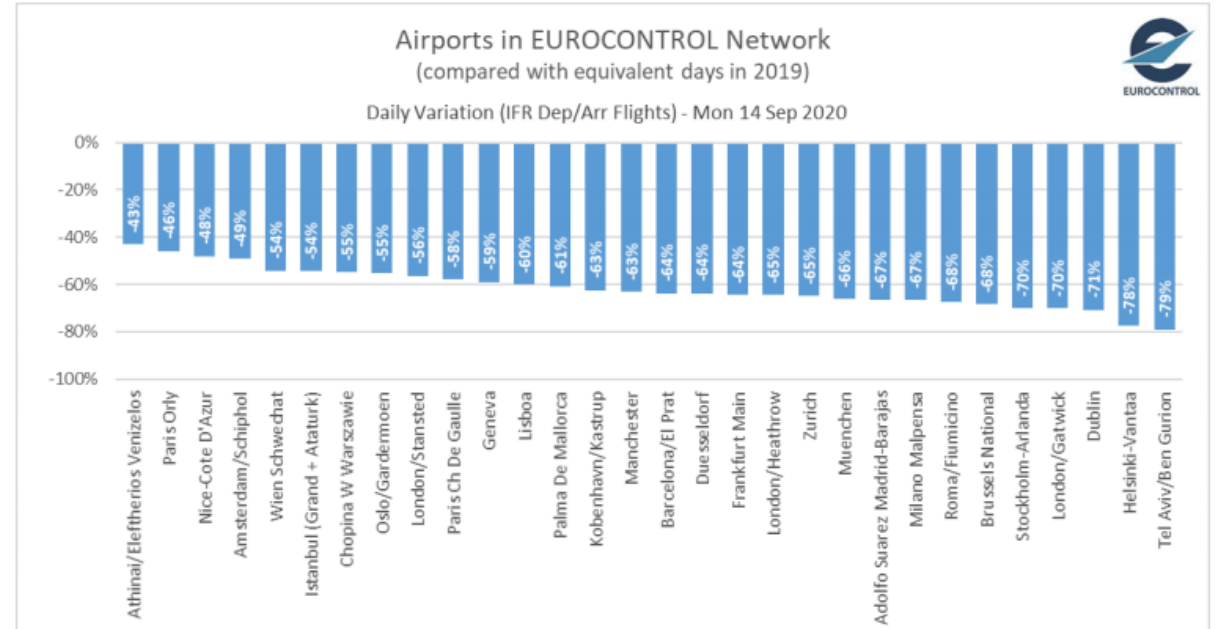


ECAC = 44 European States.



Context - What do we know?

- Flights globally down -55%, Gatwick -70%
- Globally, Airline, Airport and ANSP revenues are substantially below operating costs
 - Industry stakeholders burning cash at unsustainable rates, focussing on crisis management & survival
 - Large numbers of redundancies
- Older noisier aircraft already retired/scrapped
 - Air Transat A310
 - BA, Virgin Atlantic B747
 - WestJet, TUI B767
- No clear view on recovery

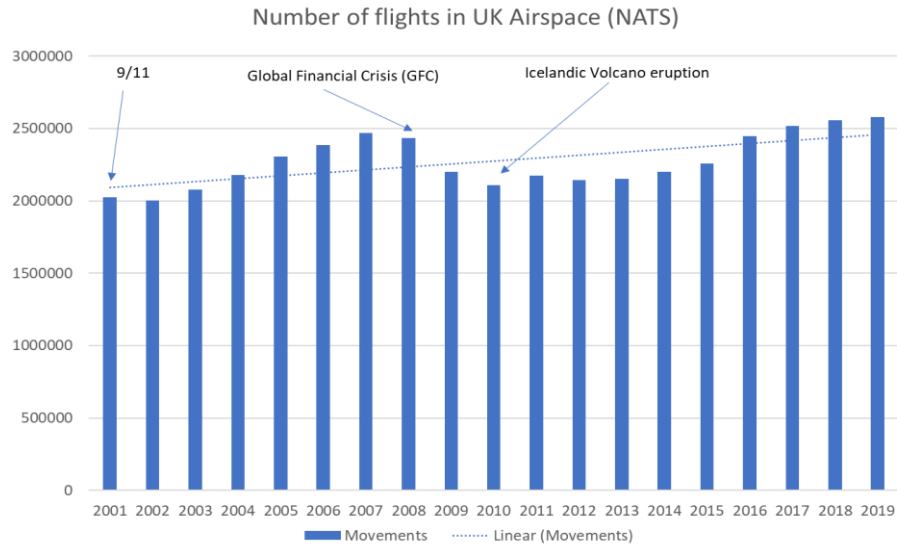


En-route air navigation charges: After a bottom of 73M€ for April flights (i.e. -89% compared to plan), the amount billed for en-route charges went up to reach 330M€ for August flights (-60% compared to plan).

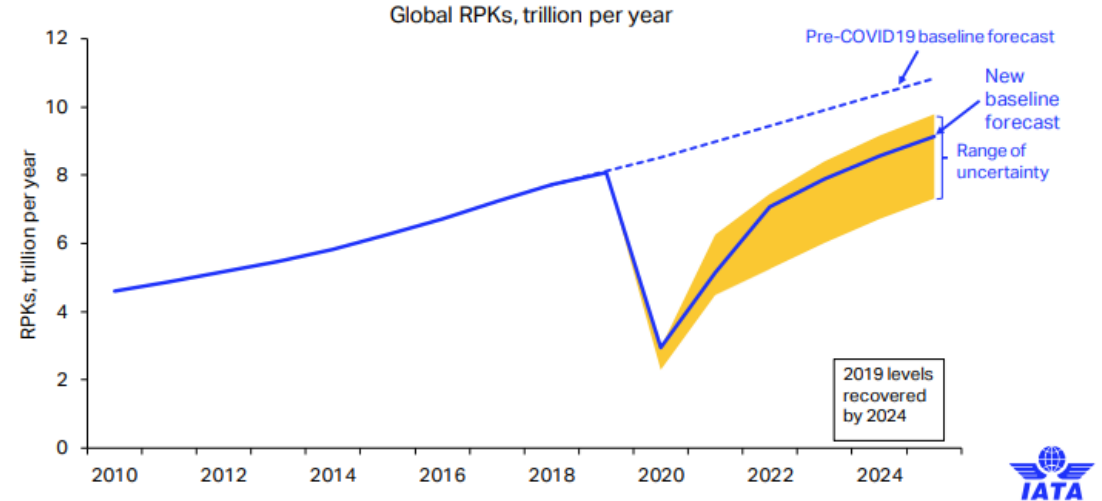
Route Charges	Mid-Feb. billing	Mid-Mar. billing	Mid-Apr. billing	Mid-May billing	Mid-Jun. billing	Mid-Jul. billing	Mid-Aug. billing	Mid-Sept. billing
Total net chargeable amounts (VAT excl.)	547 M€	516 M€	357 M€	73 M€	95 M€	120 M€	255 M€	330 M€



Context when will traffic return?

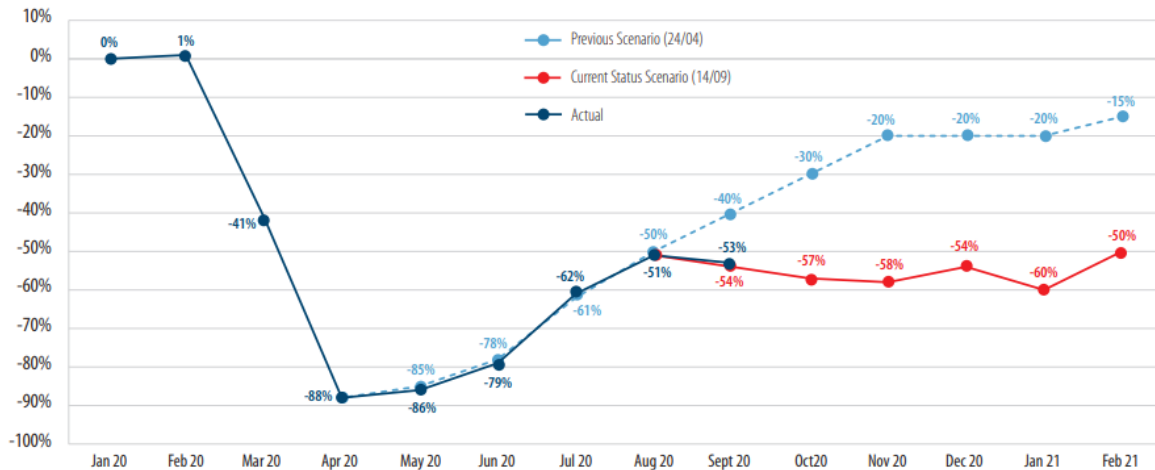


Long-term revenue loss requires a lot of restructuring
Relative to pre-crisis plans, revenues far lower for longer than expected

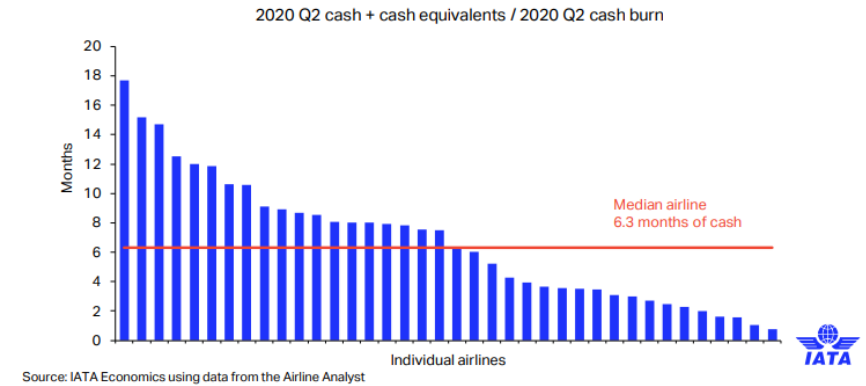


Source: IATA/Tourism Economics 'Air Passenger Forecasts' July 2020

EUROCONTROL Draft Traffic Scenarios - 14 September 2020 (base year 2019/2020)



Median airline will not last by the time demand recovers
Dramatic restructuring of costs required to get cash flows positive



Source: IATA Economics using data from the Airline Analyst



Work Plan Activities

To be reviewed in context of current Covid-19 and forecast post Covid traffic profiles

Noise Reduction Initiatives

Noise activity 1. Validate the Low Noise Arrival Metrics

Noise activity 2. Implement the Reduced Night Noise Trial

Noise activity 3. Introduce new departure noise limits

Noise activity 4. Landing gear deployment review

Noise Activity 5. Adopt the Airline Noise League Table

Strategic Initiatives

Strategic activity 1. Land Use Planning Workshops for planners and developers

Strategic activity 2. Implement a growth and noise protocol

Strategic activity 3. Facilitate Engagement with Future Airspace Strategy Implementation – South



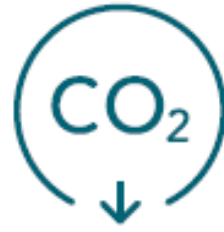
Building Back Better



Improved safety



Reduced flight costs



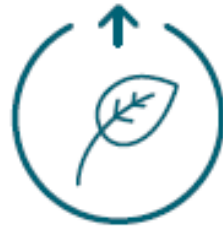
Reduced CO2



Increased airspace
capacity & resilience



Reduced flight
times & delays



Improved conservation
of tranquility



Reduced complexity



Reduce frequency
of overflight



Reduced noise



Reduced fuel burn



Improved time
management



Reduced overflight
of people



Annex

NMB Delivery Group Purpose and Membership

Purpose

- To coordinate, develop and agree by consensus, the delivery of the technical and operational implementation of agreed NMB workplan initiatives.
- To take into account the Gatwick Noise Action Plan.
- In conjunction with the NEX, the NMB Delivery Group will contribute to the development and finalisation of the annual Work Plan and thereafter will actively monitor Work Plan delivery.
- To advise NMB on the implementation schedule and any changes that may potentially impact the delivery of the agreed workplan.

Membership

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Meeting Observers

- If agreed by the membership of the NDG

