

DRAFT TfN International Connectivity and Aviation Policy Position Statement

February 2022



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1 Introduction

Transport for the North (TfN) is a Statutory Transport Body (STB) of elected leaders and a partnership of business leaders who collectively represent the region's 15 million people. As a partnership, TfN brings 20 Local Transport Authorities and 11 Local Enterprise Partnerships together with Network Rail, National Highways, HS2 Ltd, and UK Government.

Through its statutory powers, TfN provides a single voice for the North to support the development and implementation of transport strategies across the region, determining investment decisions and working with Government to enable northern priorities to be included within national priorities. Operating within this strategic position, TfN and its partners work collaboratively to identify the transport infrastructure and policy measures that are required to achieve the North's ambition. Our current Strategic Transport Plan (STP) is a formally adopted plan which outlines how strategic investment in transport could unlock inclusive and sustainable transformative economic growth across the North.

2 International connectivity in the North of England

TfN have previously undertaken policy work within international connectivity and aviation which culminated in the publication of TfN's Independent International Connectivity Commission Report (February, 2017). The report considered the economic importance of international connectivity to transform economic performance in the North and close the productivity gap. The report identified the importance of international connectivity for the North, with the North's airports handling 40m air passengers in 2016 and contributing £5.5bn to the North's GVA, whilst Northern Ports contributing 20% of all GVA generated by UK ports in 2014.¹ More recent figures since this report demonstrate the continued importance of international connectivity. Visit Britain figures show that in 2019, there were 3.99 million visits to the North by international visitors, with a total expenditure of £1.99 billion².

TfN have commissioned Atkins to support our work to update our policy position for international connectivity and aviation, which will conclude the adoption of this policy statement, defining TfN's role in this area. The purpose of this position statement is to set out the role that TfN will take in relation to international connectivity, and the steps that we will take to support our partners in delivering the ambitions aligned to international connectivity now, almost five years after the original work was completed. This position statement will then be embedded within TfN's revised Strategic Transport Plan and subsequent evidence base which we plan to adopt by December 2023.

¹ Independent International Connectivity Commissions Report, February 2017, https://transportforthenorth.com/wp-content/uploads/International-Connectivity-Report_websafe.pdf

² Visit Britain, Inbound nation, region, county data. [Inbound nation, region, county data | VisitBritain](#)

As of November 2021, we adopted our Decarbonisation Strategy which defines four plausible baseline emissions trajectories based on our Future Travel Scenarios and assesses the gap between each trajectory and TfN’s Decarbonisation Trajectory. Subsequently, we are now commencing work on the refresh of our Strategic Transport Plan. As part of this refresh, we are working to strengthen our policy for international connectivity including aviation.

For the purposes of this policy statement, **international connectivity** has been defined as “**moving people and goods effectively and efficiently between desired origins and destinations internationally**”.

TfN’s geographical remit across the North contains various airports and ports varying in scale and operations. Several major airports and ports as listed in the Independent International Connectivity report³ are shown below:

Airports	Ports
Manchester	Hull
Liverpool	Port of Tyne
Newcastle	Liverpool
Leeds Bradford	Grimsby and Immingham
Doncaster Sheffield	Tees and Hartlepool
Humberside	
Durham Tees Valley	

Within TfN’s Independent International Connectivity Commission Report (February, 2017) we examined the economic role of international connectivity for the North of England. The report included an assessment of the role of the North’s airports and ports in providing global connectivity for passengers and freight and the actions that are required to improve international connectivity in supporting the North’s business and visitor economy. It also identified the potential role of the public and private sectors in delivering the key drivers for international connectivity.

3 Literature Review

To inform this position statement, a literature review has been undertaken of current national policy and wider supporting documentation which are focused on or linked to international connectivity. This has provided TfN a greater understanding of the current context in which the position statement should be developed. A full list of the documents contained within the literature review is provided in Appendix A.

4 Key themes

The context in which the position statement has been developed has been summarised under the following key themes.

³ Independent International Connectivity Commissions Report, February 2017, https://transportforthenorth.com/wp-content/uploads/International-Connectivity-Report_websafe.pdf

4.1 The impact of Covid-19 on international connectivity

The UK Government has made progress in fully reopening the air industry following the enforced Covid-19 restrictions, however UK air capacity in November 2021 was 33% less than in 2019 and the UK is now the 4th largest aviation market in Europe, compared to being the largest market prior to the pandemic⁴. The International Air Transport Association (IATA) estimate that Covid-19 will cause a long-term loss of 2 years growth, with 2022 levels of global passengers projected to be 88% of 2019 figures, and 2023 levels projected to be 105% of 2019 figures⁵. However, despite the impact of Covid-19, the number of global air passengers and volume of cargo is expected to increase significantly over the next 30 years⁶.

The IAPH-WPSP Port Economic Impact Barometer report⁷ highlighted the impact of Covid-19 on ports. It showed that between early April and mid-July 2020 approximately half of global respondents indicated that container vessel calls were down by more than 5%. However, the situation improved considerably by September 2020 when only 28% of respondents reported a fall of 5% (compared to a normal situation). In May 2021, 55% of ports reported that the number of calls by other cargo vessels was relatively stable compared to a normal situation and 15% of ports pointed to an increase in other cargo vessel calls. As TfN, we support the North's international connectivity and understand its importance in the context of a post-Pandemic recovery. As part of this recovery, we must remain proactive to future challenges for these sectors posed by COVID-19 variants which may impact recovery or influence seasonal travel demand.

4.2 Increasing competitiveness

Whilst figures concerning the impact of international connectivity on competitiveness are not available since Covid-19, strategies written prior to 2020 point to the impact that decarbonisation and infrastructure development can have on increasing competitiveness. In 2018, aviation contributed £22 billion to the UK economy⁸ whilst air freight and its supporting businesses contributed £7.2 billion⁹. In 2021, aviation was estimated to have provided over 536,000 jobs and 4,500 businesses, with 86,000 jobs in the North West alone¹⁰.

Freeports are areas nearby to ports, airports and rail hubs where special regulations apply with the aim to boost investment, regenerate communities and enhance the local economies. It has recently been announced that the

⁴ House of Commons Transport Committee, 17 November 2021, [Committees - UK Parliament](#)

⁵ Pearce, B., IATA, Covid 19 – An almost full recovery of air travel in prospect, 26 May 2021, [PowerPoint Presentation \(iata.org\)](#)

⁶ Department for Transport, COP26 declaration: International Aviation Climate Ambition Coalition, 10 November 2021, [COP 26 declaration: International Aviation Climate Ambition Coalition - GOV.UK \(www.gov.uk\)](#)

⁷ Notteboom, T and Pallis, IAPH-WPSP Port Economic Barometer One Year Report, 2021. <https://sustainableworldports.org/wp-content/uploads/IAPH-WPSP-Port-Economic-Impact-Barometer-20-21-View.pdf>

⁸ Economic Benefits from Air Transport in the UK, Oxford Economics, 2018

⁹ Assessment of the value of air freight services to the UK economy, *Airlines UK*, 2018

¹⁰ Aviation Jobs in Great Britain, *Airlines UK*, 2021

Government will be establishing 8 new freeports¹¹, with 3 proposed in the North of England at Humber, Liverpool and Teesside. Regulatory benefits for businesses within freeports include tax, customs and planning. Local councils will also benefit from 100% business rates retention, which they can use to invest in the surrounding infrastructure to support future growth in and around the sites.

As TfN, we recognise that by making it easier for businesses to access international markets and by encouraging outward and inward investment, we can facilitate economic growth, increase the number of jobs and businesses, and increase the competitiveness of the North. However, we recognise that freeports should make the right transition in attracting new activity rather than relocating activity from other areas, whilst supporting higher-skilled jobs.

This builds on our forthcoming Freight and Logistics Strategy which recognises the tax and customs benefits freeport status will provide for several ports in the North, as well as the potential to both produce and use green fuels in these locations for fuel intensive industry clusters. The importance of green fuels and new clean energy-specific clusters is also recognised within our Decarbonisation Strategy¹².

4.3 Decarbonising transport

As set out in TfN's Decarbonisation Strategy and Trajectory, 11% of the UK's total emissions in 2019 were from aviation and shipping (compared to 22% from surface transport sources). In total, 8% of the UK's total emissions were from aviation, of which 96% was international aviation. As part of the Paris agreement, the UK Government has committed to supporting the goal to limit global warming to well below 2 degrees, preferably to 1.5 degrees Celsius, compared to pre-industrial levels.

The International Aviation Climate Ambition Coalition (IACAC), as part of COP26, is committed to working together to reduce aviation CO₂ emissions in line with the aim of limiting the global average temperature increase (to 1.5 degrees). The commitment included promoting the development and deployment of sustainable aviation fuels and promoting new, innovative low and zero-carbon aircraft technologies that reduce aviation CO₂ emissions.

DfT's Transport Decarbonisation Plan¹³ supports the shift to decarbonise transport sector operations with commitments including domestic aviation to be net zero by 2040, the requirement for international aviation to be offset to non-transport sectors, and the launch of the UK Emissions Trading Scheme (ETS), replacing the UK's membership of EU ETS. As part of the plan, DfT are now consulting on their forthcoming Jet Zero Strategy¹⁴ which sets out the UK's ambitions to decarbonise aviation in a way that preserves the benefits of air

¹¹ Department for Levelling Up, Housing and Communities, Freeports Guidance, 2021

¹² Transport for the North, Decarbonisation Strategy, December 2021

¹³ Department for Transport, A Better, Cleaner Britain, 14 July 2021, [Transport decarbonisation plan - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/transport-decarbonisation-plan)

¹⁴ Department for Transport, Jet Zero: Our Strategy for net zero aviation, 14 July 2021, [Jet zero: our strategy for net zero aviation - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/jet-zero-our-strategy-for-net-zero-aviation)

travel and maximises the opportunities that decarbonisation can bring. For aviation this has been focused across the following areas:

- Improving the efficiency of the aviation system.
- Accelerating the deployment of sustainable aviation fuels.
- Supporting the development of zero emissions aircraft with UK routes operating zero emission aircrafts by 2030.
- Ensuring markets drive down emissions in the most cost-effective way.
- Working to influence the behaviour of consumers through encouraging the use of the most sustainable routes and travel providers.

The Jet Zero Council¹⁵ (a partnership between industry and government, and set to be the catalyst for zero emission flights across the Atlantic) has set out that the focus of delivering net zero and zero emission technologies will be by developing and industrialising zero emission aviation and aerospace technology, establishing UK production facilities for sustainable aviation fuels (SAF), and commercialising the industry by driving down production costs and developing a coordinated approach to the policy and regulatory framework needed to deliver net zero aviation by 2050. In the North, Manchester Airport as part of the Manchester Airports Group has committed to Net Zero airport operations by 2038 and Newcastle International has committed to achieving this target by 2035.

The UK Government's Clean Maritime Plan¹⁶ sets out the ambition for the UK to become a global leader in the maritime sectors and specifically that by 2050 zero emission ships will be commonplace. There are several types of technology which the plan identifies as having the potential to support zero-emission maritime including electrification and alternative fuels. The report highlights that it is expected that alternative fuels will play the largest role in decarbonising maritime.

As part of TfN's response to DfT's Jet Zero Consultation¹⁷, we set out that UK domestic aviation should set a net zero target by 2040, or earlier where possible, and we welcomed the focus on net zero aircraft and aircraft operations. Through our Decarbonisation Strategy, we have made our own commitments to reducing carbon emissions through engaging with partners and stakeholders and investigating what actions both TfN and its partners can take at a local and regional level to deliver emissions savings.

4.4 Supporting cohesion

DfT's recently commissioned independent Union Connectivity Review¹⁸ assesses the current transport connectivity within and between the UK to make recommendations to maximise economic potential and improve quality of life. It

¹⁵ Jet Zero Council (JZC), [Jet Zero Council - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

¹⁶ Department for Transport, Clean Maritime Plan, July 2019 - [Clean Maritime Plan \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

¹⁷ Transport for the North, Response to DfT's Jet Zero Consultation, September 2021

¹⁸ Department for Transport, Union Connectivity Review (Final Report), November 2021 - [Union Connectivity Review \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

considers the quality and availability of transport and provides recommendations that seek to address inequalities in connectivity and economic potential across the UK, several of these recommendations are directly related to air connectivity. The review considers the impact of Covid-19 and Brexit and examines economic indicators to build a picture of the economic situation of the UK.

One of the key recommendations of the report is the possible development of a new UK Strategic Transport Network which acts as a UK equivalent of the Trans-European Network of Transport (TEN-T). It will account for many interdependencies including the development of freeports, the Integrated Rail Plan (IRP), the Regional Air Connectivity Review and Aviation Recovery Plan, the Williams-Shapps Rail Review and national transport strategies. Whilst the Union Connectivity Review is focused on domestic connectivity, its development will have implications for enhancing international connectivity and attracting further investment.

Transport-related social exclusion is also relevant in the context of international travel, in terms of providing access to international gateways for the North's residents, as well as widening access to employment opportunities in the businesses surrounding airports and ports. This is especially important given, the higher deprivation levels of some areas near to the North's airports and ports. The results of our Social Exclusion Research will further develop the evidence base in this area.¹⁹

TfN have an important role to play in supporting cohesion, particularly in terms of connecting Wales and Scotland. As outlined in TfN's Long Term Rail Strategy,²⁰ we have a role to play in supporting rail to help people travel across the UK, but also in terms of connecting access to airports and ports in the North from Wales and Scotland, but also to their own international gateways via rail.

4.5 Surface access to airports and ports

The UK Government's Aviation Policy Framework²¹ stresses the importance of surface access for airports, outlining how all proposals for airport development must be supported by surface access proposals which will ensure passengers can readily access efficient and reliable services that increase the use of public transport, minimise congestion and reduce impacts on the local transport network.

Consequently, the North's airports have developed surface access strategies which set requirements and interventions in line with this policy requirement. In terms of surface access to ports, the Government's Port Connectivity Review²²

¹⁹ Transport for the North, New Northern Research project set to tackle link between transport and social exclusion, March 2021, [Research project to tackle link between transport and social exclusion | News - Transport for the North](#)

²⁰ Transport for the North, Long Term Rail Strategy, February 2018

²¹ Secretary of State for Transport, Aviation Policy Framework, March 2013, [Aviation Policy Framework \(publishing.service.gov.uk\)](#)

²² Department for Transport, Ports Connectivity Review, 2017, [Transport infrastructure for our global future: a study of England's port connectivity \(publishing.service.gov.uk\)](#)

looked at the wider UK freight and transport policy picture and its specific impact on ports. It detailed seven recommendations, which included ensuring that the needs of ports are captured in future transport investment decisions.

The UK Government's Northern Powerhouse Agenda – One North²³, recognises that the promotion of international connectivity relies on strong surface access connectivity from across the region, and it sets out plans to better connect Manchester airport to neighbouring cities by rail through HS2 and Northern Powerhouse Rail (NPR). This remains critical for the North and should be considered as the IRP is delivered. In addition to this, the airports and ports in the North have their own masterplans and/or strategic visions which encompass surface access, which would need to be considered when identifying surface access interventions.

The road network remains central in providing direct connectivity to the North's key international gateways. TfN recognises the importance in ensuring the network supports the move to zero or low emission vehicles, more efficient use of vehicles and road space through shared mobility and autonomous vehicle technologies.²⁴ The road network is a flexible asset which can adapt new and more efficient means of transport, which will provide a better end-to-end customer experience and respond to societal, environmental and technological challenges and opportunities.

For TfN, we recognise the need for an increased focus on surface access becoming zero emission. An objective of TfN's Strategic Transport Plan is improving access to transport across all communities as doing so has the potential to make low carbon surface access more accessible and efficient for access to key airports in the North.

4.6 Optimising the opportunities from the green economy

The Government's Ten Point Plan for Green Revolution²⁵ made it clear that now is the time to build back better and align economic recovery with environmental commitments. The UK Infrastructure Bank has been set up with £22bn of financial capacity to help tackle climate change.

In terms of international connectivity, the UK Government has set out that alternative fuels have a role to play in delivering a decarbonised transport sector. The UK Government's Hydrogen Strategy²⁶ shares the Government's commitment, of up to £20m (for 2021), for the Clean Maritime Demonstration Competition to accelerate the design and development of zero emission marine vessels in the UK, and £15m (for 2021) for the 'Green Fuels, Green Skies' competition to support the production of first-of-a-kind sustainable aviation fuel

²³ Department for Transport/Transport for the North, The Northern Powerhouse: One Agenda, One Economy, One North, March 2015 [The Northern Powerhouse: One Agenda, One Economy, One North](#)

²⁴ Transport for the North, Draft Major Roads Report, 2021

²⁵ HM Government, The Ten Point Plan for a Green Industrial Revolution, November 2020, [The Ten Point Plan for a Green Industrial Revolution \(publishing.service.gov.uk\)](#)

²⁶ HM Government, UK Hydrogen Strategy, August 2021, [UK Hydrogen Strategy \(publishing.service.gov.uk\)](#)

(SAF) plants in the UK. The Clean Maritime Plan²⁷ highlights several locations in the North of England as potential hotspots in the UK for clean maritime fuel generation, storage or distribution.

As TfN, our Decarbonisation Strategy²⁸ set out two specific commitments on hydrogen. The first is to undertake a pan-North study on hydrogen refuelling, initially focused on HGVs but with the view to expand this to rail, aviation and shipping. The second commitment is, as part of that study, to engage with partners and Government to develop hydrogen infrastructure across the North, with one aspect of focus being on the potential for airports for both the generation and storage of hydrogen and hydrogen derived fuels. Furthermore, TfN's Electric Vehicle (EV) Charging Infrastructure Framework provides greater opportunity in supporting sustainable fuel sources as it sets out the ambition for an effective and integrated EV network across the North, which can connect key economic clusters such as at airports and ports within the proposed EV network.

5 Links to other workstreams

International connectivity links to several TfN's workstreams, the key strategies that need to be considered in line with this position statement are:

- **Decarbonisation Strategy:** Policy measures to consider aviation emissions as part of TfN's decarbonisation trajectories and pre-agreed targets. The evidence base generated by our activities in this area can support future activity in this area,
- **Visitor Economy and Transport in the North of England Research:** Identifies the importance of the domestic and international visitor economy market for the North of England, with the various tourism assets the North provides. As part of this, accessibility to international gateways is important for enabling future growth in the North's visitor economy, with the report identifying the importance of high-quality, integrated public transport links to enhance surface access and support decarbonisation ambitions.
- **Freight and Logistics:** TfN's forthcoming Freight and Logistics Strategy highlights the importance of delivering port to port zero-carbon multimodal corridors which will require future collaboration between partners and as well as capitalising on opportunities relating to Freeport status for several ports in the North. Ensuring there is suitable freight capacity via rail and road to the North's ports will support future global trade opportunities essential to the UK economy.
- **TfN Strategic Rail:** TfN's existing Long Term Rail Strategy recognises the importance of international connectivity for the North and the existing gaps in the North's network where journey times and interchange requirements for access to the North's international gateways reduce the attractiveness of public transport. It also recognises that journey times and networking capacity reduce the attractiveness and competitiveness for rail freight. For strategic rail, the ambition is to reduce journey times between the North's economic and freight centres, and between these

²⁷ Department for Transport, Clean Maritime Plan, July 2019 - [Clean Maritime Plan \(publishing.service.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/814217/clean-maritime-plan.pdf)

centres and international gateways, which must form a key consideration as infrastructure for HS2 and the Integrated Rail Plan is delivered.

- Through the **Major Road Network (MRN)** Regional Evidence Base: With most passenger and freight travel via road, it is critical to ensure the MRN is well connected to the North's international gateways. TfN are promoting the delivery of several improvement schemes, including schemes that may support more efficient access to the North's airports and ports, as well as considering the first and last mile of journeys and how they can be sustainably integrated within key economic clusters.
- **Transport Related Social Exclusion (TRSE) Research:** For TRSE, it is important that new transport development linked to ports and airports should not exacerbate severance or increase car dependency, whilst ensuring sustainable accessibility to jobs for those living in areas surrounding ports and airports. Any impacts linked to ports and airports, particularly noise pollution, air pollution, and severance should also be mitigated.
- **Northern Powerhouse Independent Economic Review (NPIER):** Due to be refreshed in 2022, the NPIER sets out a transformational future for the North's economy by 2050 and will consider linkages to international connectivity through international trade.
- **TfN Monitoring and Evaluation Framework:** This will monitor several areas relevant to pan-Northern international connectivity policy, such as surface accessibility to airports and ports, CO2 emissions, international visitor numbers, and exports from northern ports and airports.

6 TfN's suggested role in relation to international connectivity

TfN recognises the importance of international connectivity in supporting a post-Pandemic recovery, whilst understanding the environment impacts of international aviation. Our ambition for international connectivity is therefore to encourage international connectivity in a greener and cleaner way, promoting where feasible, more sustainable alternatives.

We support a '*rail first approach*', which sets out that rail is the preferred mode of travel domestically and we welcome alternatives to flying for international travel where these are competitive. TfN recognises that improvements to local public transport networks are a crucial element in supporting domestic travel and providing an efficient and more integrated travel experience across the North and wider UK. Delivering integrated sustainable travel can also support surface access improvements to airports and ports as part of our remit to decarbonise travel, recognising the importance of international connectivity for the North.

Additionally, we have an ambition for the North to become a hub for the green economy, noting that there are already significant clusters of activity in several areas.

6.1 Coordination and influencing:

Within TfN's role, we can coordinate and influence international connectivity in the North in collaboration with our partners. In a coordination capacity, we can bring together relevant stakeholders to ensure that collectively the North maximises opportunities to influence and promote international connectivity. We also can influence national policy in relation to international connectivity, ensuring that the opportunities for the North are maximised.

Action:

- To reintroduce hosting pan-regional airport, port and public transport operator round tables to discuss issues and challenges within international connectivity and aviation.
- To improve communications with central Government and to act on behalf of our partners and key stakeholders as a central voice to influence UK Government policy in relation to international connectivity.
- To work with technical experts and academia within international connectivity and aviation to receive impartial and independent advice to support TfN's Board and wider governance groupings in relation to the topic.

6.2 Providing evidence-based recommendations:

At TfN, we have a modelling and analysis capability that enables us to provide evidence and support to partners. In relation to International Connectivity, there are opportunities to use this capability to support our role in coordinating and influencing international connectivity across the North.

Action:

- To provide central accountability for emissions statistics in the North in relation to international aviation and maritime that can feed into Decarbonisation targets and trajectories.
- Through our Decarbonisation Strategy, to consider how TfN can build shipping and aviation emissions into our models and future baseline decarbonisation trajectories. This will include examining options for reducing these emissions and gaining consensus amongst partners.
- Through our Analytical Framework and Monitoring and Evaluation Framework, monitor accessibility to airports and ports by rail and road. This will provide high-level accountability for surface access to international connectivity and supporting appraisal of schemes that will improve accessibility.

7 Key areas of influence

7.1 Improving surface access and seamless journeys:

With a small number of exceptions, airports and ports are not the final destination for people or goods, making onward surface access an important priority. Many of the North's airports and ports are directly served by onward rail, light rail, tram or bus services which link gateways to city centres, distribution hubs and visitor hotspots. For airport passengers, there are challenges around the discrepancy in demand patterns which are different to

traditional peak periods. This is particularly relevant to rail connections, where engineering work is generally planned for overnight periods and on weekends.

There is also a need to consider transport options to and from international points of entry. Confusing ticketing arrangements, poor quality services, and insufficient information can act as a barrier to encouraging visitors to use public transport to access international gateways and can impact their experiences of travelling to the North. TfN has a role to play in supporting seamless and user-friendly ticketing, information, and marketing to provide more integrated journeys for those arriving and departing from both domestic and international airports and ports. This also extends to surface access to the North's ports in which infrastructure improvements to rail freight such as gauge clearance would enable modern intermodal containers to be transported via rail.

7.2 Supporting clean, green growth:

With shipping and aviation contributing significantly to UK emissions, and the UK's and regional commitment to emission reduction plans, there is a need for TfN to work closely with partners and relevant stakeholders to reduce emissions and support the growth of alternative fuels both for shipping and aviation. This will build on current progress across the North such as Manchester Airport developing a new direct supply for SAF or Humberside's agreement to supply British Airways with SAF.

7.3 Supporting the economy and visitor economy:

International connectivity is intrinsically linked to supporting the wider economy and the visitor economy. For the North to compete as a single economy, it requires first-class links to the rest of the world including the growing markets of China, India and Brazil. Airports and ports also have the potential to position as linchpins for wider economic hubs supporting Foreign Direct Investment through aviation focused activities (e.g. maintenance / logistics) or business park activities (allowing companies to benefit from locations adjacent to airports). The special regulatory environment for businesses operating within freeports will have the potential to further enhance the economy around certain ports in the North of England.

Furthermore, the visitor economy also encompasses direct and indirect contributions to the economy and had prior to the pandemic a total net GVA impact of £12.33 billion²⁹ (pre-Pandemic, 2019). However, the North's visitor economy is more domestically oriented than England's, accounting for 25% of England's total tourism spend but only 14% of international visitors to England. TfN has a role to play through working with partners and relevant stakeholders to support the growth of the economy including our high-quality tourism offer across the North and making the North more attractive to international visitors.

7.4 Proposed recommendations for international connectivity and aviation:

²⁹ TfN, Atkins and the Leisure Consultancy, Visitor Economy and Transport in the North of England, July 2021

The proposed policy recommendations for international connectivity and aviation based on the above key areas of influence are:

Action:

- Through the appropriate forums, work with partners and key stakeholders to explore opportunities and threats to international connectivity, identifying the preferred solutions which TfN can consider in collaboration with UK Government. As part of this, we will work with airports and ports to understand their own surface access ambitions and masterplans, and how this aligns with TfN's investment programme and spatial planning policy.
- To support partners and key stakeholders in their own proposals for decarbonisation such as through the Airport Carbon Accreditation and Green Port programmes, whilst also recognising the importance in promoting the North of England as a place to invest on a global scale, in line with work undertaken by UK Department for International Trade.
- To explore future workstreams that explore delivering smart ticketing options for international visitors through collaboration with TfN's Strategic Rail team and wider stakeholders such as public transport operators.
- In line with the recommendations of TfN's Decarbonisation Strategy and EV Charging Infrastructure Framework, consider further opportunities for the use of hydrogen and electric fuel sources within transport, establishing relationships with private sector organisations that are currently developing alternative fuels e.g. Humberside green energy cluster, TfN's EV Steering Group. We will also maintain a focus on decarbonising surface access to airports.
- To support the visitor economy through the recommendations set out in TfN's Visitor Economy and Transport study and TfN's Tourism and Rail Covid Report, which include greater collaboration with partners, integrated ticketing and marketing initiatives and delivering high-quality and efficient public transport and active travel connectivity.
- To consider the recommendations set out in TfN's Freight and Logistics Strategy in facilitating and developing partnerships to achieve port to port zero-carbon multimodal corridors. This includes capitalising on the freeport status of several ports in the North and ensuring that there is suitable freight capacity via rail and road to the North's ports, which will also support future global trade opportunities vital to the UK's economy.

8 Proposed next steps

The next steps for TfN's international connectivity and aviation policy position are to progress engagement with partners and key stakeholders to ensure that the policy actions are fit for purpose and will add real value in realising the clean growth opportunities for international connectivity, whilst also ensuring this is achieved in accordance with TfN's Decarbonisation Strategy. We will work with our partners and key stakeholders across the North to progress the actions identified within this policy statement, coordinating and influencing key workstreams within international connectivity whilst utilising TfN's own modelling and research capabilities to enhance our evidence base.

We will continue to develop our evidence base, progressing key workstreams that support our international connectivity and aviation policy. This includes the carbon trajectories and ambitions outlined in our Decarbonisation Strategy, our Strategic Rail and Major Roads programmes to support future surface access opportunities and our forthcoming Freight and Logistics Strategy which will consider interventions to improve accessibility for freight to the North's airports and ports. We will also consider TfN's wider programme of work which can enhance the evidence base for international connectivity and aviation such as our Analytical Framework and our Research and Economics work in areas such as Transport Related Social Exclusion and the North's Visitor Economy. The Northern Powerhouse Independent Economic Review is due to be refreshed in 2022 as part of an on-going programme of research, which will also have linkages to international connectivity through international trade.

APPENDIX A:

List of reviewed documents

Airlines UK & York Aviation, (no date), *Aviation Jobs in Great Britain*. Available through: <https://airlinesuk.org/wp-content/uploads/2021/07/Aviation-Jobs-in-Great-Britain.pdf>

AOA, (no specified date), *A UK Airport Recovery Plan*. Available through: <https://www.aoa.org.uk/wp-content/uploads/2021/02/AOA-Airport-Recovery-Plan-1.pdf>

Aviation Authority, 2020, *The impact of the coronavirus pandemic on the aviation sector: Aviation Authority Responses to the Committee's second report*. Available through: <https://publications.parliament.uk/pa/cm5801/cmselect/cmtrans/745/74502.htm>

CAA, (2018), *Airspace Modernisation Strategy*. Available through: <https://www.gov.uk/guidance/airspace-modernisation>

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