

Summary:

Economic and Geographic Impacts of Gardermoen 2001

This report is a documentation of the first after-study of geographical and economic short term impacts of the new Norwegian main airport at Gardermoen. One reference here is the before-study described in TØI-report 361/1997.

The after-situation is defined as 2001/2002, i.e. three years after the opening of the new airport in November 1998. One ambition is to present this situation for Gardermoen in as 'transparent' and credible a way as possible, in order to be able to carry out comparable after-studies at future points in time.

Impacts may be defined in a number of ways, and the literature is not unambiguous here. One appropriate way is to distinguish between direct, indirect, induced and catalytic impacts, appropriate because it is practical: The direct impacts can in principle be registered, the indirect impacts must be calculated, while the induced impacts in general must be modelled, for example by economic base and input-output techniques.

In this context, multipliers are defined as the ratio between impacts. One such multiplier is the ratio between induced and the sum of direct and indirect impacts, another is the ratio between the total and the direct impacts, and, consequently, there are others.

The data collection in a project like this is a 'risky' undertaking. One reason is a general problem related to primary data. One makes oneself totally dependent upon the good will of people and firms. Another is that the questions may be time consuming and partly difficult to answer, and especially so for the major actors, such as airlines.

Referring to the literature and investigations of more and less comparable international airports, we designed our survey to include information on number of on-site and off-site employees, home addresses, payrolls and other budget components of the altogether some 125 interviewees. The report discusses in some detail the practical organization of the data collection, and of the resulting quality.

The findings themselves may be briefly summarized as follows:

- As of January 1, 2002, the number of jobs directly associated with Oslo airport Gardermoen is some 12 200.
- 70% of the jobs are airline and airline servicing jobs, 5% are governmental and other public service jobs, 10% are related to hotels, restaurants and retailing, and 15% are other activities, including ground transport.
- Grouping home addresses of the employees by municipality, we observe a clear-cut picture in that two well-defined areas are dominating: Three of the

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most nearby municipalities have a share of 35-40%, the same share as the capital of Oslo together with the core area of the employees of the old main airport Fornebu.

- These activities correspond to an enterprise with a yearly turnover of ca NOK 18 billion, with a salary budget of some 3,8 billion.
- These salaries when consumed may support a labor force of some 2 200 man-years in the corresponding sales and service enterprises.
- Regarding indirect impacts, we have tried to illustrate their importance by quantifying the impacts on the member enterprises of Innovation Gardermoen, i.e. a local business organization. On the basis of their degree of dependence, we have found that these enterprises correspond to a 100% airport dependent enterprise with a yearly turnover of ca NOK 3 billion.
- Another important impact is the consumption generated by the air passengers visiting the Oslo region. We have estimated an yearly amount of NOK 9 billion, which may correspond to 6 – 7 000 man-years in the corresponding sales and service enterprises.
- Summing up, we have identified direct and indirect impacts corresponding to a turn-over figure of NOK 35 billion, and some 21 000 man-years, impacts of which 25% manifests themselves in the host region of Ullensaker, Nannestad and Eidsvoll municipalities.
- If we apply an multiplier of 3,5 for the ratio between total impacts and direct impacts , we find that Gardermoen 2001 may represent a total of some 35 000 man-years and a turn-over figure of NOK 63 billion.
- The general conclusion in this investigation is the following:

We have shown that economic impacts of Oslo airport Gardermoen are real and measurable, that they are significant, that we observe that many of them are already manifest in the geographic vicinity of the airport, but also that the potential impacts on this region not yet have been fully realized.