

Study Advisory Committee Meeting No. 2
Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)
Maryland Aviation Administration (MAA)

Edwards and Kelcey, Inc.

March 5, 2003

Study Advisory Committee Meeting No. 2

Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)

Maryland Aviation Administration (MAA)

Agenda

- 1. Introductions**
- 2. Review First SAC Meeting Minutes**
- 3. Review Report No. One - System Inventory & Forecasts of Demand**
- 4. General Discussion of System Requirements**
- 5. SAC Breakout Sessions**
- 6. Recap of Breakout Session Findings and Recommendations**
- 7. Upcoming Tasks**
- 8. Next SAC meeting**

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Maryland Aviation Administration (MAA)

Study Format

Phase I

Status as of March 5, 2003

- System Inventory ***Draft Report Submitted***
- Forecast of Rotorcraft Demand ***Draft Report Submitted***
- System Requirements ***In Progress***
- Definition of System Goals and Objectives ***SAC Input***
- Phase II Scope Revisions and Finalization

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Study Format

Phase II

- Recommended System
- Environmental Issues
- Economic Impacts of the Recommended System
- Policies and Plans for System Development
- Implementation Program
- Security and Disaster Airlift Plan

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Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)

Maryland Aviation Administration (MAA)

Maryland Aviation Administration (MAA) Issues

- 1. Can a system of strategically located privately-owned/limited-use helipads throughout Maryland adequately serve helicopter operator demand without the need for large public-use downtown or key suburban heliports?**
- 2. How can the needs of the various helicopter users be balanced with public concerns about noise and safety?**

Study Advisory Committee Meeting No. 2

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Maryland Aviation Administration (MAA) Issues

3. How will airspace, air traffic control services, GPS instrument approaches for heliports, etc. impact plans and policies for heliport development within the State?

4. Will the purchase, ownership, operating, and maintenance costs of helicopters increase to the point where they will constrain demand?

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Metropolitan Washington Council of Governments (COG) Issues:

- 1. Analyze how existing and future helicopter operations in the region impact residents, employees, and visitors.**
- 2. Residents in a number of locations in the region have expressed concern about helicopter noise, and many of those areas of concern are located under designated helicopter routes, and the intersections of those routes.**

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Metropolitan Washington Council of Governments (COG) Issues:

3. What is the relationship between helicopter activity and economic development, as well as the importance of helicopter activity to the overall transportation needs of the Metropolitan Washington region.

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Metropolitan Washington Council of Governments (COG)

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Long History of Helicopters in the Study Area



**Emile and Henry Berliner Helicopter 1924 -
College Park Airpark**



Patuxent River NAS - 1943



First Helicopter One - 1957

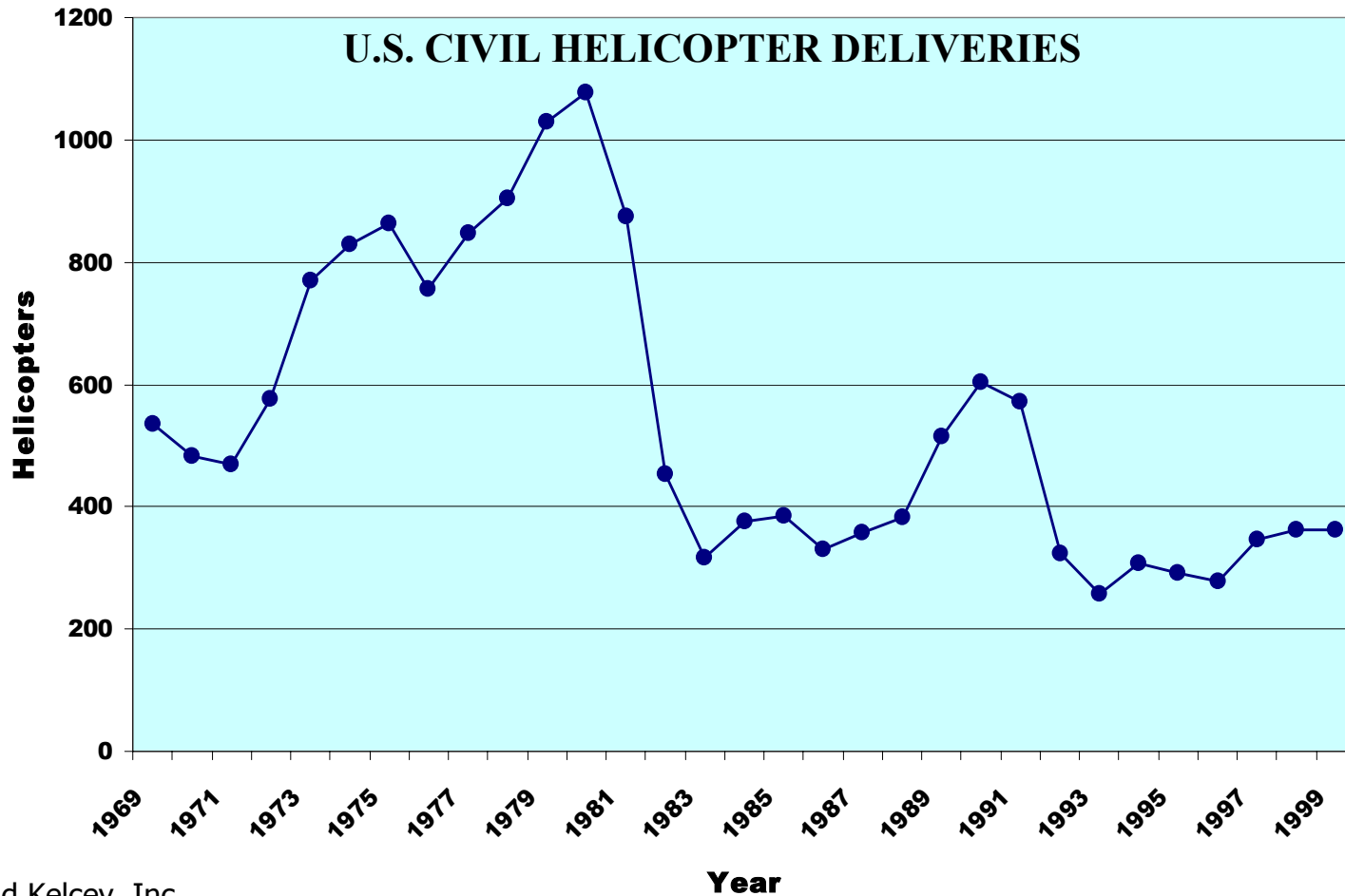
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Helicopter Deliveries



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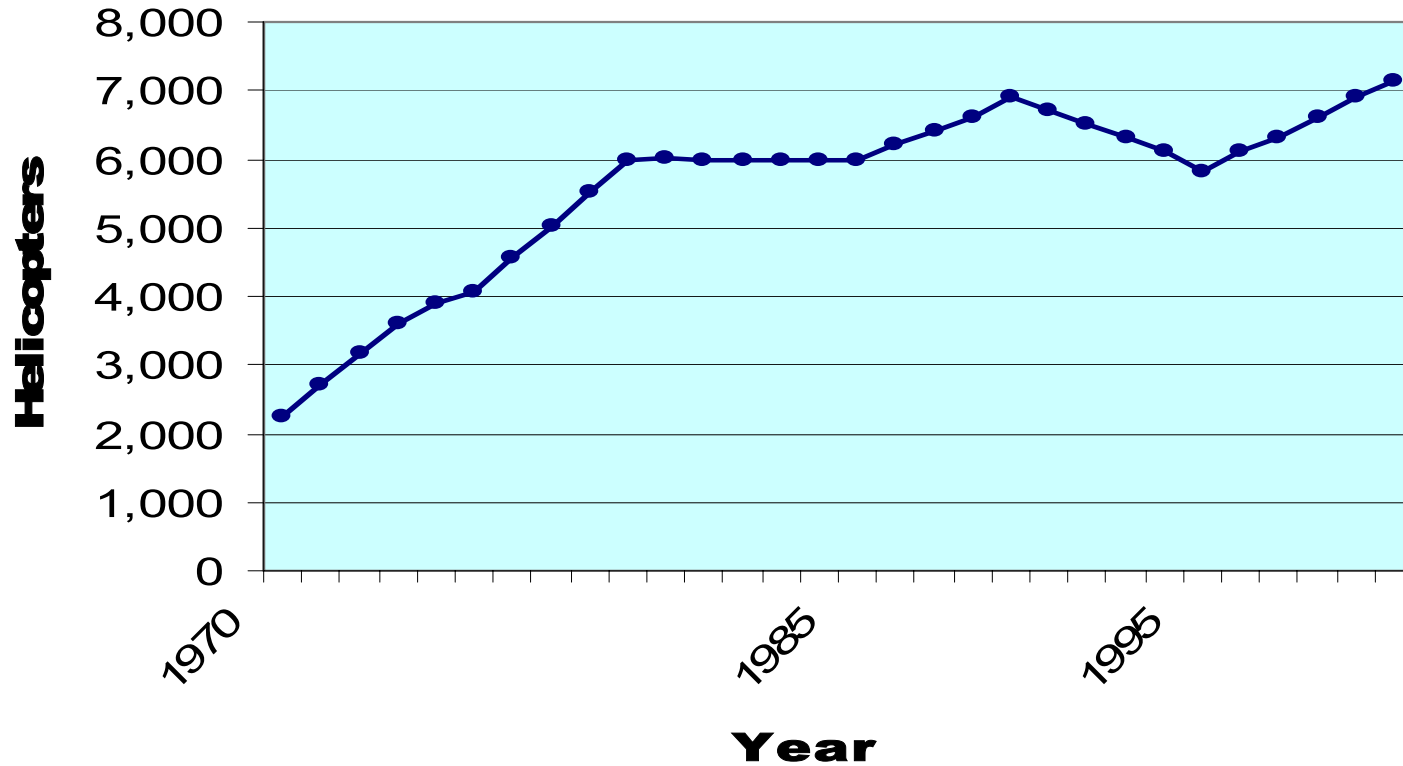
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Active Civil Helicopters

U.S. ACTIVE CIVIL HELICOPTERS



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Historical Activity in COG Region

ITEM	1992	2000	2002
	(Actual)	(Forecast)	(Actual)
Based Helicopters	140	--	41
Helicopter Operators	35	--	15
Helicopter Operations	180,000	200,000	108,870
Heliports	51	--	48

Sources: 1992 & 2000 data: MWCOG, Helicopter System Inventory and Vertiport Feasibility Study for Metropolitan Washington, July, 1992. 2002 data: Edwards & Kelcey survey.

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U.S. Air Force 89th Airlift Wing



U.S. Air Force Helicopters over D.C



White House photo by Susan Sterner

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Landing Facilities in COG Region

Facility	Private/Corp	Govt.	Military	Medical	Public Use	Total
Heliport	12	10	3	22	1	48
Airport	0	0	2	0	14	16
Total	12	10	5	22	15	64

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Regional Helicopter System Plan

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Maryland Aviation Administration (MAA)

Helicopter Operators in COG Region

<u>Operator</u>	<u>Base</u>	<u>Helicopter (Number)</u>
Anne Arundel County Police Dept.	Tipton Airport	Bell OH-58 (2)
AOL/Time Warner	Dulles Int'l Airport	SK-76, Bell 430, Bell 407 (3)
Bechtel Nevada	Andrews AFB	Bell 412 (1)
Capital Helicopter	Fairfax Heliport	Bell 407 (2)
CVC Helicopter Inc.	Darlington, MD	Schweizer 300C (1)
Fairfax County Police Dept.	Fairfax, VA	Bell 407 (1)
HeloAir	Sandston VA	Bell 206, Bell 407, Schweizer 300C (5)
Inova Hospital	Fairfax County Hospital	Bell 407 (1)
Metropolitan Police Dept.	South Capitol Street	American Eurocopter AS 350 B3 (1)
Prince George's Co. Police Dept.	Washington Exec. Airport	MD 520N (2)
US Air Force - 89th Airlift Wing	Andrews AFB	UH-1N (20)
U.S. Park Police	District of Columbia	Bell 412 (2) Bell 206L (1)

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Helicopter Based in COG Region (2002)

Type of Helicopter	Number	Percent
Total	41	100%
Civilian	21	51%
Military *	20	49%
Piston	2	5%
Single Turbine	16	36%
Twin Turbine	23	59%
Total	41	100%

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Landing Facilities in Maryland

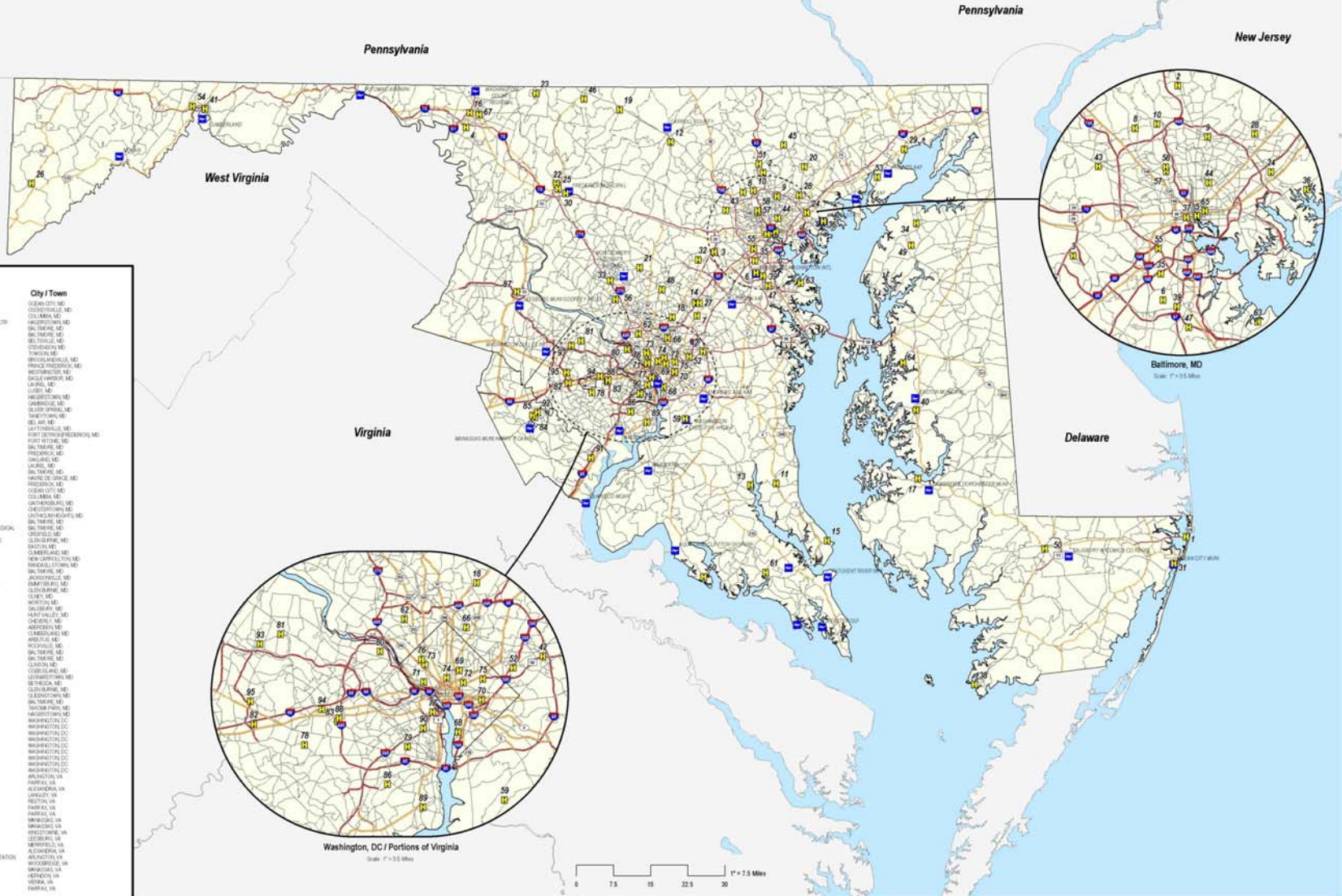
Facility	Private/Corp	Govt.	Military	Medical	Public Use	Total
Heliport	15	5	3	27	0	50
Airport	0	0	1	0	32	33
Total	15	5	4	27	32	83

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Maryland / Washington D.C. Regional Heliports

- Legend**
- Heliport Locations
 - Highway
 - Local Roads
 - Water
- Road Classification**
- Limited Access Highway
 - Highway
 - Local Roads
 - Water

Source:
 Data: Map information:
 Geographic Data Technology, Inc. (GDTI) and
 Environmental Systems Research Institute, Inc. (ESRI)
 2000 Census Data



Heliport Number	Heliport Name	City / Town
1	BETHESDA	BETHESDA, MD
2	AM	AM, MD
3	ADRIANUS TICHONEN	ADRIANUS TICHONEN, MD
4	ALLEGANY POWER PLANT/EMERGENCY CENTER	ALLEGANY POWER PLANT/EMERGENCY CENTER, MD
5	BALTIMORE POLICE DEPARTMENT	BALTIMORE POLICE DEPARTMENT, MD
6	BALTIMORE WASHINGTON	BALTIMORE WASHINGTON, MD
7	BELTSVILLE SHOP	BELTSVILLE SHOP, MD
8	BELTSVILLE	BELTSVILLE, MD
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100	BELTSVILLE	BELTSVILLE, MD



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Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)

Maryland Aviation Administration (MAA)

Helicopter Operators in Maryland

<u>Operator</u>	<u>Base</u>	<u>Helicopter (Number)</u>
Advanced Helicopters	Frederick Airport	R-22 (6), Bell Jet Ranger (1)
Anne Arundel County Police	Tipton Airport	Bell OH-58 (2)
Baltimore City Police	Martin State Airport	EC-120 (1)
Baltimore County Police Aviation	Martin State Airport	Bell 206 (3)
America Rising/Glenwood Aviation	Tipton Airport	A-109, B-206 (5)
CVC Helicopters Inc.	Darlington	Schweizer 300C (1)
Helicopter High Inc.	Martin State Airport	R-22, R-44, B-206 (5)
Maryland ANG, 29th Aviation Brigade	Edgewood	UH-1H, UH-60A, OH-58 (26)
Maryland State Police (MSP)	Martin State Airport	EC AS-365N II (12)
Prince George's Co. Police Dept.	Washington Executive Airport	MD 520N (2)
Stat Medevac	Martin State Airport	BK-117 (1)
Whirlwind Aviation Inc.	Frederick Airport	AS-365 (2), S-76 (1)
U.S. Navy Test Center	Patuxent River NAS	SH-60
U.S. Air Force, 89 th Airlift Wing	Andrews AFB	UH-1N (20)

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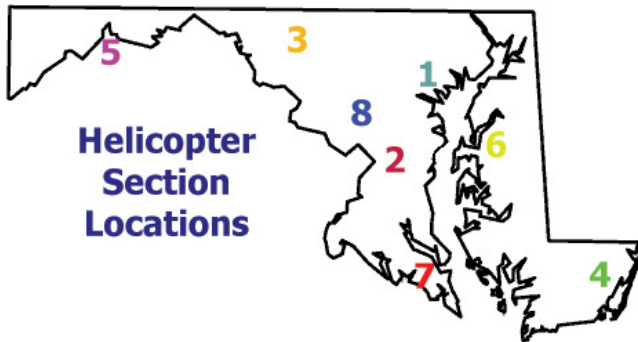
Maryland Aviation Administration (MAA)



Maryland State Police AS-365N II



**Stat Medevac at Johns Hopkins
Hospital Heliport**



America Rising – Charter/Air Taxi

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Helicopter Based in Maryland (2002)

Type of Helicopter	Number	Percent
Total	68	100.0%
Civilian	42	61.8%
Military	26	31.2%
Piston	9	13.3%
Single Turbine	29	42.6%
Twin Turbine	30	44.1%
Total	68	100.0%

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Helicopter Missions in Maryland

Mission	% of Operations
Emergency Medical Services (EMS)	32.3%
Military/defense	16.2%
Aerial patrol/survey	10.3%
Flight Training	9.6%
Law Enforcement	8.6%
Other	5.2%
Corporate/business	4.6%
Electronic news gathering (ENG)	4.2%
Agriculture/spraying	3.3%
Filming/aerial photography	3.1%
Personal	1.3%
Wildlife management	1.0%
Utility	0.3%
Total	100%

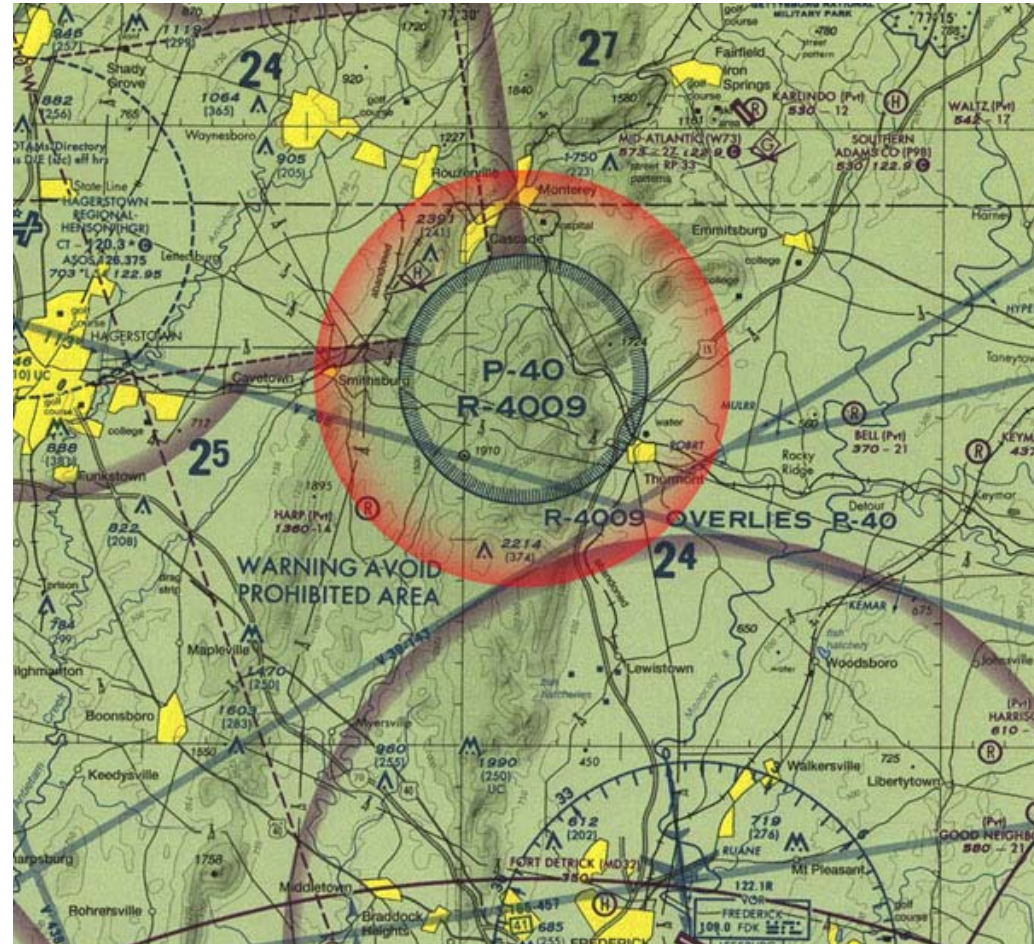
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Prohibited Area (P-40) Camp David, MD



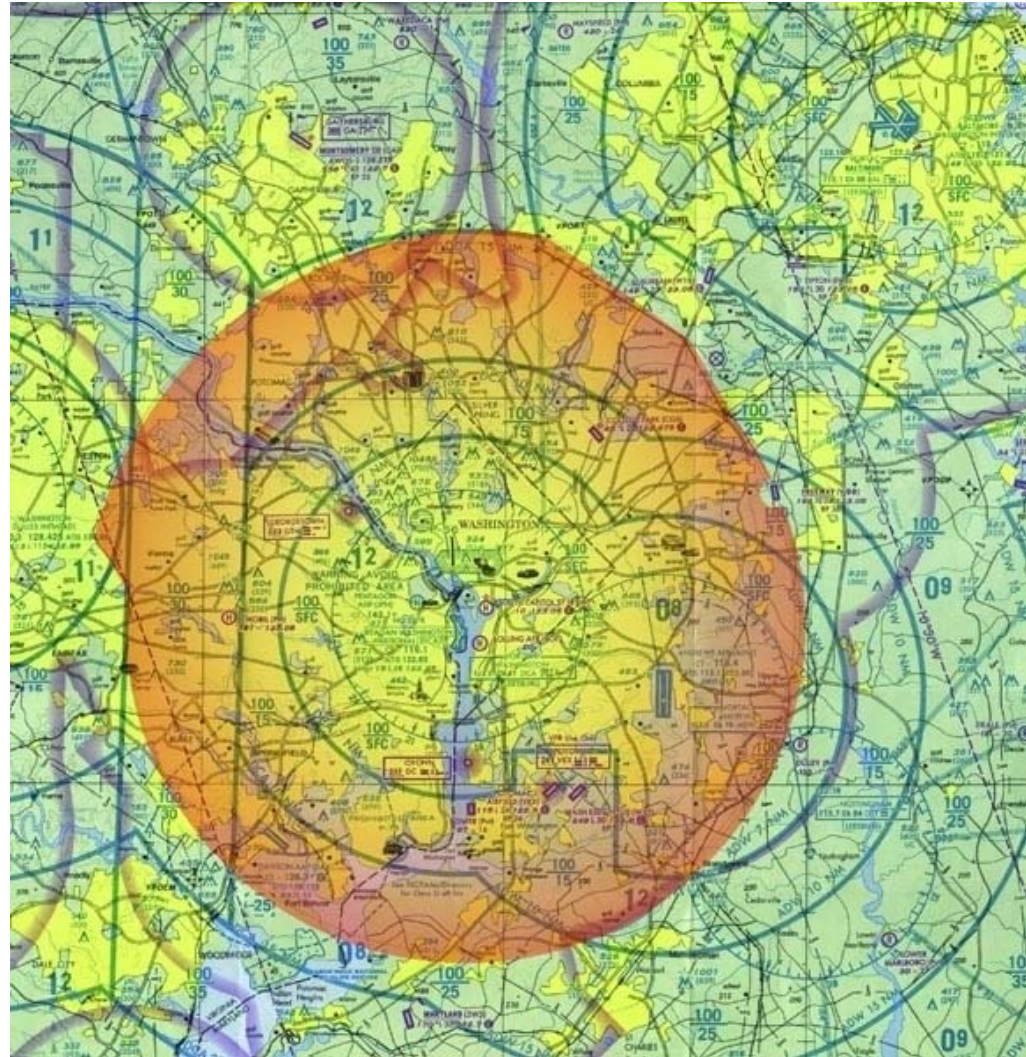
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Maryland Aviation Administration (MAA)

Temporary Flight Restrictions Washington DC



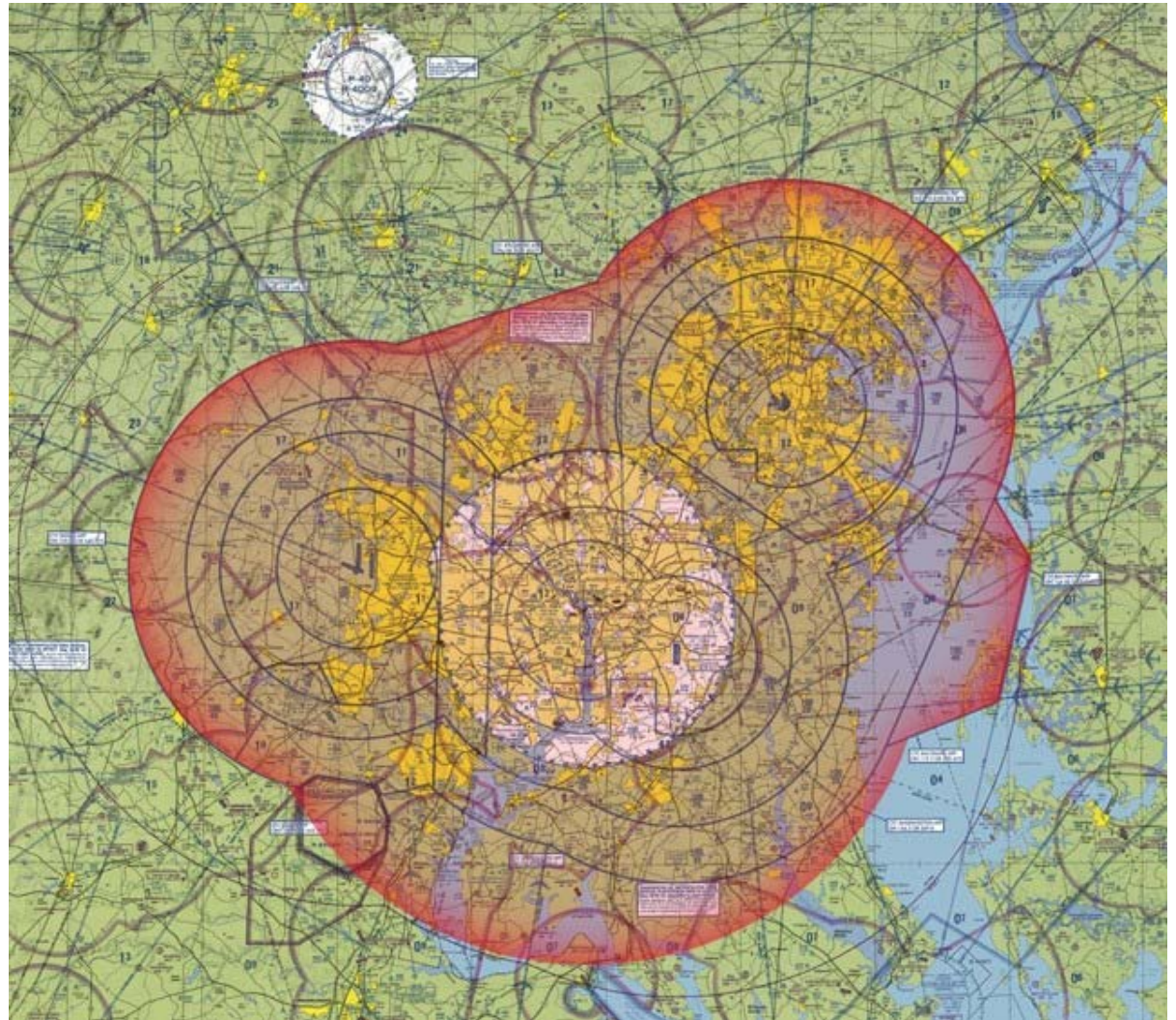
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Maryland Aviation Administration (MAA)

Air Defense Identification Zone (ADIZ)



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Zoning and Land Use

- The regulation of heliports does not seem to be a concern for most jurisdictions.
- Less than half of the jurisdictions in the state of Maryland have regulations that address aircraft landing facilities of any kind, including airports.
- Of those jurisdictions with regulations, the larger, more densely developed jurisdictions tend to have regulations whereas the smaller, less densely developed areas do not.
- The Metropolitan Washington COG member jurisdictions, all but two have some form of regulations related to helicopter landing facilities.

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Maryland / Washington D.C. County Heliport Zoning Ordinances

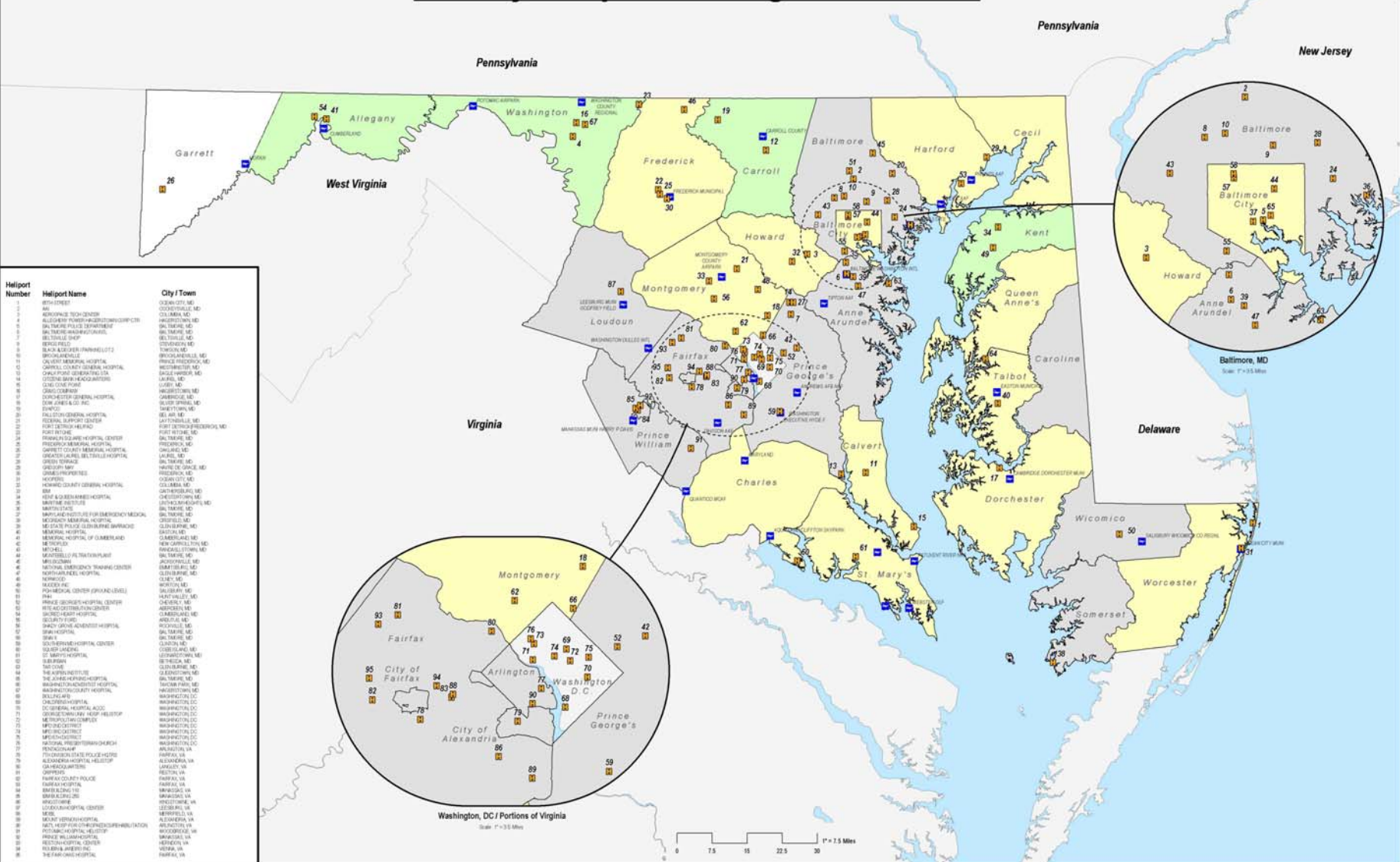
Legend

- Heliprot Location
- Airport

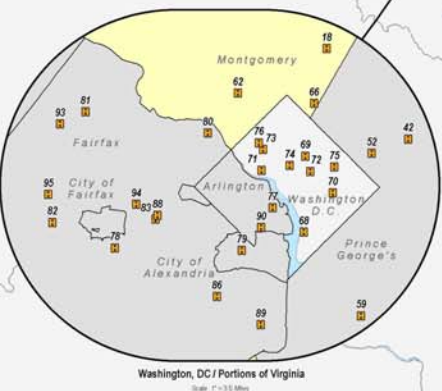
HELIPORT ZONING ORDINANCES PER COUNTY

- PERMITTED BY RIGHT
- PERMITTED BY SPECIAL EXCEPTION USE
- NOTY-PROHIBITED BY RIGHT & SPECIAL EXCEPTION USE
- NOT HELIPORT ZONING

Source:
Base Map Information:
Geographic Data Technology, Inc. (2007) and
Environmental Systems Research Institute, Inc. (2004)
2008 Latest Issue



Heliprot Number	Heliprot Name	City / Town
1	8TH STREET	COVINGTON, MD
2	AM	COVINGTON, MD
3	ADRIANUS TICH ZONER	COLUMBIA, MD
4	ALLEGANY POWER AND LIGHTS (MUNICIPAL)	COLUMBIA, MD
5	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
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82	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
83	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
84	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
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86	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
87	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
88	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
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90	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
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92	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
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96	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
97	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
98	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
99	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD
100	SALEEM FIELDS (MUNICIPAL)	GREENBELT, MD



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Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)

Maryland Aviation Administration (MAA)

Zoning and Land Use (cont.)

In jurisdictions without any applicable regulations (i.e. the use is not mentioned in the ordinance):

- In some jurisdictions the ordinance language clearly states that if a use is not expressly permitted, then it is prohibited.
- Others are less specific and are handled on a case by case basis.
- In some instances, permitting a new use could require an amendment to the zoning ordinance or municipal code.

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Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)

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Zoning and Land Use (cont.)

Those jurisdictions that have applicable regulations and allow helicopter-landing facilities:

- Most are permitted as a Special Exception (SE) or Special Use Permit (SUP) use, most commonly in industrial and rural residential/agricultural zones.
- The requirements for obtaining a SE or SUP typically involves a formal application and review by the Planning Commission or Board of Zoning Appeals.
- In jurisdictions that specifically regulate heliports, helistops and helipads, many identified conditions of use or performance standards that would have to be met in order to grant a SE or SUP. These dealt with a range of issues including noise, setback requirements, hours of operation, number of aircraft on site, frequency of use, public vs. private use, maintenance facilities, lighting, screening, etc.

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Regional Helicopter System Plan

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Maryland Aviation Administration (MAA)

Zoning and Land Use (cont.)

Those jurisdictions that have applicable regulations and allow helicopter-landing facilities:

- Many also identify that the design of such facilities must comply with applicable FAA regulations.
- A small amount of jurisdictions (14 in the State of Maryland) do allow heliports By Right or as a Principal Permitted Use in limited zones.
- The majority of those allowed By Right are permitted in industrial zones.

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Regional Helicopter System Plan

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Forecasts of Demand

FAA National Forecast of Helicopter Activity (2002-2013)

Active Helicopters			Hours Flown		
Piston	Turbine	Total	Piston	Turbine	Total
8.9%	2.7%	5.0%	11%	7.8%	8.5%

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Maryland Aviation Administration (MAA)

GA Active Fleet: Assumptions and Forecasts

- ***F/W piston***
 - ***Single-engine: contraction in fleet through 2003; no change in 2004; and resumption of growth in 2005***
- ***F/W Turbine***
 - ***Turboprop: slight decline through 2003; modest growth through 2013***
 - ***Turbofan/jet: modest to strong growth throughout the entire forecast period***
- ***Rotorcraft***
 - ***Decline through 2003; modest growth, led by piston through 2013***

**George Stamas, FAA General Aviation Forecast
Conference 2002-2013**

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Regional Helicopter System Plan

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Aircraft Utilization: Assumptions and Forecasts

→ *Piston*

- "Aging" of piston fleet and decline in number of student pilots leads to lower piston utilization at end of forecast period***

→ *Turbine*

- Increase in turbine utilization is largely due to increase in number of these aircraft in fractional ownership programs***

→ *Rotorcraft*

- Utilization decreases slightly due to change in fleet mix and changing use patterns***

→ *Net Effect*

- Overall 2.6% increase in utilization over forecast period***

**George Stamas, FAA General Aviation Forecast
Conference 2002-2013**

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Forecast Concerns/Risks

- ***Long term effects of security measures on GA***
- ***Economic cycle -- strength of recovery and its effect on GA***
- ***“Aging” GA fleet -- aircraft production and affordability***
- ***Ability of airport and ATC system infrastructure to support growth***

**George Stamas, FAA General Aviation Forecast
Conference 2002-2013**

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Maryland Aviation Administration (MAA)

Local Factors Affecting Future Helicopter Activity

- Regional highway congestion and delays
- Availability of public-use heliports
- Availability of off-airport landing sites
- Continued airspace and airport access restrictions
- Lack of access to Reagan National Airport
- Availability and cost of aviation insurance (both liability and hull)

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Regional Helicopter System Plan

Metropolitan Washington Council of Governments (COG)

Maryland Aviation Administration (MAA)

Two Forecast Scenarios

-
- Status Quo
 - High Growth

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Metropolitan Washington Council of Governments (COG)

Maryland Aviation Administration (MAA)

Status Quo Forecast Scenario

- Airspace restrictions remain in place
- Access to GA airports within 15 mile radius restricted
- No new public use heliports in either DC or Baltimore
- Insurance rates continue to increase & availability decreases
- Security procedures extended to GA aircraft & airports
- Cost of helicopter ownership & operation rises faster than CPI

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Maryland Aviation Administration (MAA)

Status Quo Forecast Scenario

- Based helicopters and operations experience a decline by 2020
- Military helicopter activity will remain steady or increase
- Police and EMS helicopter activity will increase slightly
- Corporate, air taxi, flight training, utility, & personal activity will decline

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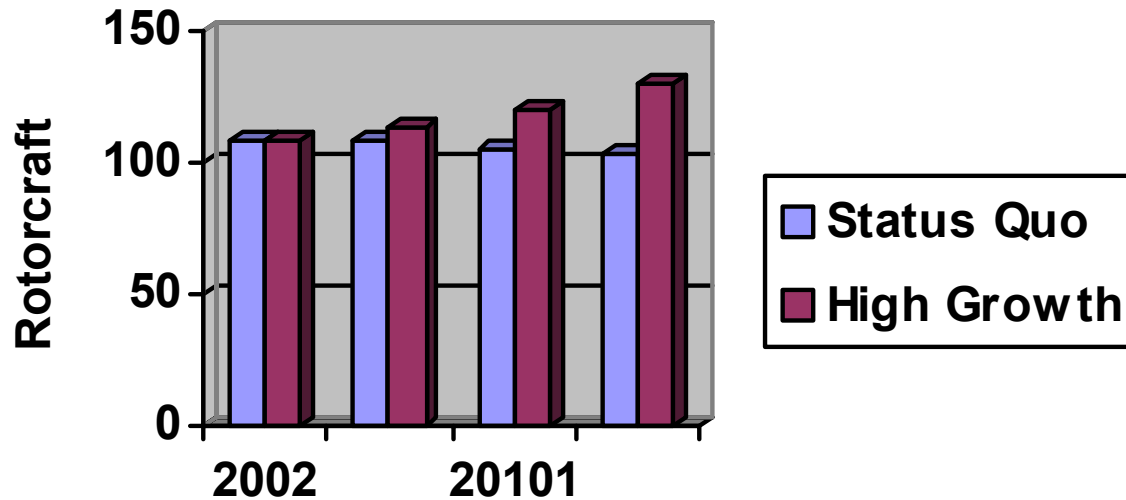
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Maryland Aviation Administration (MAA)

Forecasts of Demand

Forecast of Based Rotorcraft



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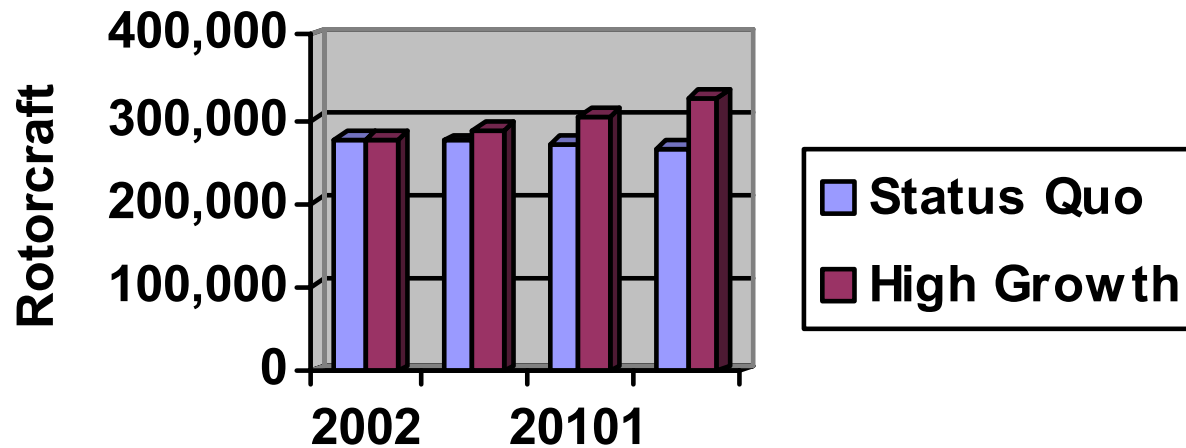
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Maryland Aviation Administration (MAA)

Forecasts of Demand

Forecast of Rotorcraft Operations



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Maryland Aviation Administration (MAA)

High Growth Forecast Scenario

- Airspace and airport access restrictions are lifted
- Regional highway congestion continues to increase
- Public use heliports are opened in both DC and Baltimore
- Insurance rates stabilize over a long period
- Cost of helicopter ownership & operation stabilizes

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High Growth Forecast Scenario

- Based helicopters and operations will increase by 21% by 2020
- Military helicopter activity will remain level
- All segments of civil helicopter market will increase

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Existing System Characteristics

- Helipads are predominantly privately-owned private use
- Minimal facilities
- No instrument approaches to heliports
- Airports serve as bases, provide facilities & services
- Unprepared sites serve as landing areas

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Existing System Characteristics

- Most public agency operators expressed little need for additional facilities
- Corporate/air taxi operators need additional facilities, including public use heliports in DC and Baltimore
- Lack of access to Reagan National Airport impacting corporate activity
- Helipads at highway rest areas/park-n-ride lots could serve EMS & police missions
- Standardize local local helipad permitting process

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Breakout Sessions

- Facility Needs and System Requirements
- Airspace/ATC/Operating Restrictions
- Land Use/Zoning/Noise

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Breakout Sessions Objectives

- Define system goals
- Provide more detail on key issues

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Recap of Breakout Session Findings and Recommendations

- Facility Needs and System Requirements
- Airspace/ATC/Operating Restrictions
- Land Use/Zoning/Noise

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Metropolitan Washington Council of Governments (COG)

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Upcoming Tasks

- Economic Impacts (near completion)
- Noise Impacts (public input)
- System Requirements (near completion)
- Definition of System Goals and Objectives (SAC Input)
- Phase II Scope Revisions and Finalization (SAC Input)

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Next SAC Meeting

- June Timeframe
- Focus on Defining System Goals and Objectives
- Finalize Phase 2 Scope of Work