Airport-linked special economic zones, aerotropolis projects and the race to the bottom

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Abstract:
A new generation of airport-linked special economic zones - characterised by tax breaks, other incentives, and government provision of supportive infrastructure including surface transportation networks - is an increasingly significant factor in a global race to the bottom on tax. This paper highlights a number of examples of new SEZs, which benefit major transnational firms, foreign investors and real estate developers.

In the UK, as a major increase in Business Rates looms over small businesses, firms locating in Enterprise Zones - many located adjacent to or encompassing airports, including Manchester, Blackpool, Luton and Newquay - receive a substantial Business Rate discount and other subsidies.

Tourism oriented airport-linked SEZs in SE Asia include several new Indonesian SEZs incorporating substantial stretches of coastline dotted with white sand beaches. Recently announced funding and tax breaks for tourism SEZs in the Philippines is set to commence with resort development around the new San Vicente Airport.

Freight oriented airport-linked SEZs include: the 95 square kilometre China-Belarus Industrial Park adjacent to Minsk Airport, SEZs with an aerospace component at Dholera Airport in India and OR Tambo Airport in South Africa and an aviation hub component of an economic zone encompassing U-Tapao Airport in Thailand.

The paper examines the spatial and regulatory inter-relationship between airport linked SEZs and aerotropolis projects - airport centric developments designed to be aviation dependent and support airport growth. Examples include a 2,500 hectare SEZ in the new Imam Khomeini International Airport, and a tax free zone within the planned Tunisia Economic City which has been allocated a 90 square kilometre site including 13 kilometres of coastline for tourism development.

The paper includes maps of several airport-linked SEZs to elucidate spatial aspects such as strategic locations and integration with surface transportation networks.

Introduction
A 2.5 square kilometre business park established in 1959, adjacent to Shannon Airport near the west coast of Ireland, is widely regarded as the world’s first special economic zone (SEZ). The land was offered up to foreign investors, lured with tax holidays, tariff reductions and other incentives. Now there are several thousand SEZs around the world. There are many variants, including free trade zones, free zones, free ports, foreign trade zones, enterprise zones and export processing zones, but all are characterised by big-business friendly deregulation with laws differing from the rest of the country, tax breaks and other incentives benefitting investors.¹

The track record of SEZs in achieving the much vaunted benefits of export earnings and employment is highly variable. Benefits often fail to extend beyond the boundaries of the designated enclaves due to weak linkages with the host economy. Foregone tax revenue puts a strain of government coffers and investors often take advantage of tax breaks only to relocate to alternative sites offering even more generous perks, leaving SEZs languishing as useless white elephants. Commercially linked land seizure, frequently of
productive farmland, for SEZs, is part of the global land-grabbing phenomenon that is displacing rural and indigenous people. This paper examines a few examples of an emerging new generation of airport-linked SEZs, supported by governments with allocation of land, generous tax breaks, and public funds for infrastructure including airport construction, utilities and surface transportation networks.

Allocation of land for airport-linked economic zones has triggered opposition to displacement. In Indonesia there are long-standing land rights struggles in parts of Mandalika SEZ. In south Bangladesh a planned new airport in Bagerhat, to serve development of Mongla port and economic zone, threatens farmers from nine villages with loss of their land and livelihood. In Thailand, citizen groups are concerned that the Eastern Economic Corridor (EEC), spanning three provinces, could result in large scale displacement of residents. In India, farmers’ resistance to displacement for Dholera Airport and other components of a 920 square kilometre SIR (Special Investment Region) is intertwined with struggles to secure water supplies for their crops. In Pakistan, development of Gwadar airport, port and economic zone is beset with similar tensions over water supplies. In both instances schemes that promised irrigation for farmland have not materialised and water has instead been channelled to economic zones for the benefit of investors. As Gwadar and Dholera farmers face displacement both areas offer new territory for real estate speculation, while the Indonesian government has invited the real estate sector to invest in tourism SEZs.

Airport-linked economic zones can provide space for MRO (Maintenance, Repair, and Overhaul) operations servicing aircraft, and for the wider aerospace industry which can encompass civilian and military applications. Expansion of U-Tapao Airport in Thailand, a joint civil and military facility, includes a 1,000 hectare special investment promotion zone for aviation, to incorporate aircraft related business, air cargo and warehouses. The Gujarat state government intends to develop Dholera Airport as an MRO hub, and to support the development of the wider region as a hub for the defence industry. Initial developments in an aerotropolis project around Johannesburg’s OR Tambo Airport include two projects by Denel, a South African state-owned aerospace and defence technology conglomerate.

A number of the emerging new airport-linked economic zones are linked with aerotropolis projects. An aerotropolis, also known as an ‘aeropolis’, ‘airport city’ or ‘aerocity’, is an airport surrounded by commercial and/or industrial development. Air passengers are funnelled through hotels, shopping malls, entertainment and cultural venues on land around the airport. Manufacturing, industrial and assembly plants, along with distribution and logistics complexes, are integrated with the airport’s cargo facilities. Aerotropolis-style development is designed to be aviation dependent and support airport growth. A symbiotic relationship is established between expansion of the airport and growth of the industrial and commercial development surrounding it.

Now a mainstream planning trend worldwide, aerotropolis development began around a few airports, notably Schiphol, Munich and Frankfurt in Europe, Dallas/Fort Worth in the US and Changi in Singapore in the 1990s, followed by Seoul’s Incheon Airport and Kuala Lumpur Airport. Along with an airport-centric spatial configuration all these aerotropolis projects share an economic model that underpins expansion and economic viability: The airports all own a large area of land upon which the airport-linked development takes place; ‘non-aeronautical revenue’ from facilities on this land, operated by the airport and via concessions and leases, cross-subsidises airport operations and expansion.

Imam Khomeini International Airport (IKIA) in Iran and Dholera Airport are examples of aerotropolis projects adopting the non-aeronautical revenue model. Other examples of airport-linked economic zones, while not described as an aerotropolis, bear the spatial hallmarks of this form of development, with the airport being built before the development on the land surrounding or adjoining it, such as China-Belarus Industrial Park, San Vicente Tourism Economic Zone (TEZ) and Tunisia Economic City. In other instances, airport projects form an integral component of and catalyst for development of an integrated complex of megaprojects designed to feed each other’s growth. The planned airport in Bagerhat would facilitate expansion of Mongla Port, development of Mongla Economic Zone and construction of Rampal coal plant.
A new Gwadar airport, integrated with a deep sea port and free zone, forms a key node in the China-Pakistan Economic Corridor (CPEC). In Thailand, aerotropolis development around U-Tapao Airport, plus roads linking the facility to Bangkok’s two main airports, are prioritised as the first phases of infrastructure development for EEC, a blueprint for industrial estates interlinked with construction of roads, railways and expansion of sea ports.

**IKIA – a 140 square kilometre aerotropolis with an SEZ**

One of the world’s largest aerotropolis sites encompasses Imam Khomeini International Airport (IKIA), 35 kilometres south of Tehran. The scale of the planned airport city, covering 140 square kilometres, rivals Dubai South at 145 square kilometre; construction of the initial phase of this aerotropolis around Dubai’s new airport, called Al Maktoum, has already commenced. Opportunities for investors in IKIA airport city have been presented in the form of 25 ‘technical towns’ focussed on a range of activities including ‘health, education, tourism, media, entertainment, trade, environment, high tech, exhibition and export’. In March 2015 the Iranian government established the IKIA Airport City Company to manage the project and supervise investment in and development of an aerotropolis covering a 137 square kilometre area around the airport, containing a 1,500 hectares free trade zone (FTZ) and a 2,500 hectare SEZ. Managing director of IKIA airport city, Mahmoud Navidi, said: “All economic players willing to initiate business in this FTZ will be exempt from paying tax for as long 20 years.” Businesses registered in the SEZ will be exempt from duties, value added tax (VAT) and tariffs on import of manufacturing machinery.

Objectives for IKIA airport city include ‘creating sustainable sources of income to improve aeronautical, cargo and passenger operations’. A full 60 per cent of the airport’s revenue is expected to be ‘non-aeronautical revenue’ from commercial and industrial and activities on airport owned land. In December 2015 the contract for Phase 1 construction of the aerotropolis, referred to as ‘IKIA Airport Town’ and including two new passenger terminals and part of the free trade zone, was awarded to Netherlands Airport Consultant Company (NACO).

**IDZ and aerotropolis development around OR Tambo Airport**

An Industrial Development Zone (IDZ) offering tax breaks and an aerotropolis are under development around Johannesburg’s OR Tambo Airport. A sod turning ceremony was held for the IDZ in September 2015. The Gauteng Province’s Growth and Development Agency has committed US$19 million government funds to the project, covering 725 hectares around the airport, with export-oriented, industry specific precincts to be developed over a 10-15 year period. The first development is to be a jewellery manufacturing facility. Tax breaks include import duty relief on goods for storage, raw materials and machinery used in manufacturing process, zero VAT rating for goods supplied from South Africa and VAT exemption for goods imported from abroad.

The IDZ is part of a wider aerotropolis project around OR Tambo Airport, in the Ekurhuleni municipality. There is promotion of opportunities for SMEs but the initial developments are an air cargo logistics hub and two projects by Denel, a South African state-owned aerospace and defence technology conglomerate: Denel Mega City Aviation and an Aerospace Manufacturing Precinct.

**Tunisia Economic City to encompass 18 kilometres of coastline**

Plans for Tunisia Economic City (Figure 1), along the coastline north of Enfidha Airport, were announced in 2014. A full-spectrum urban development is envisaged comprising economic centres, commercial and residential facilities, academic centre, research hubs, sport city and media city. The goal is to attract international corporations, international banks, International Financial Institutions (IFIs) and insurance firms which will be able to take advantage of a tax free zone. Launched by the government, and a delegation from Saudi Arabia, in February 2017, Tunisia Economic City will enjoy the status of an economic free zone. The 90 square kilometre site encompassing one of most important tourism areas of the country,
Figure 1  Tunisia Economic City
18 kilometres of coastline, where land will be available to investors. Tourism facilities are planned including a port to accommodate boats of all sizes, hotels, large shopping centres, sports city with stadiums, Olympic village, golf courses, a Formula One circuit and facilities for skating and skiing.8

San Vicente TEZ includes the longest beach in the Philippines

The Philippines’ flagship Tourism Enterprise Zone (TEZ) includes the country’s longest beach. The site, immediately north of the new San Vicente Airport on the west coast of the archipelagic Palawan Province, was announced in June 2016 by the Tourism Infrastructure and Enterprise Zone Authority (TIEZA), an agency of the Philippines government. TIEZA Chief Operating Officer Guiller B. Asido said San Vicente was selected for its “pristine natural attractions of forests, islands, covers, and most specially its 14.7 kilometer shoreline” and also would be developed as a gateway to other tourism destinations. The priority area for San Vicente TEZ covers 883.1 hectares, a strip about 500 metres wide along the Imuarian Bay coastline (Figure 2). An Integrated Tourism Master Plan (ITMP) had been formulated in consultation with the municipal government and property owners and an Investment Promotions Program was being created in order to make San Vicente attractive to investors.9 The provincial government of Palawan allocated funds for transportation infrastructure to support tourism in 2015, including 22 municipal airports in 22 towns, each expected to cost US$1 million, in order to ensure ‘seamless travel’ to tourism sites. A further US$40 million was allocated for road networks from airports to tourism areas.10

By January 2017 five flagship TEZs had been designated, along with six private sector led TEZs, with plans for up to 12 by the end of the year. Announcing fiscal incentives for investment in TEZs, Finance Secretary Carlos G. Dominguez III said: “Though the foregone revenues are significant, these fiscal incentives will be able to encourage more investments into the tourism sector”. Previously, the Aquino administration had not issued a revenue regulation over concerns that such incentives would reduce government revenue, but the revenue regulation was issued after appeals by TIEZA and the Department of Tourism (DOT). Fiscal incentives for TEZs include: six year tax holiday that may be extended for a further six years or a 5 per cent preferential tax on gross income, tax free import of capital goods and equipment, VAT and excise tax exemptions and tax credits on procurement of local goods and services. Fiscal incentives may also be granted to tourism enterprises located outside TEZs. Additional non-fiscal incentives apply in relation to import of professional equipment, foreign currency transactions plus lease and ownership of land. Fiscal incentives are also available to private TEZs, such as Resorts World Manila in Pasay, Bravo Golf in Negros Oriental and Kingdom Global City in Davao, but TIEZA will not develop infrastructure for these ventures.11

In February 2017 the Duterte administration announced a goal of attracting US$8.3 billion in private sector investments in the country’s tourism destinations by 2022. TIEZA COO Asido said that the 2016-2022 public sector outlay required to support development of tourist destinations was US$16.2 billion, including for roads, ports, bridges and expansion of international airports to improve access.12 TIEZA Deputy COO Joy Buluaitan said the agency was willing to fund infrastructure projects having an approved budget for water and sewage system, access roads and modular docking facility. TIEZA confirmed that all the major players in Boracay, one of the busiest resorts in the Philippines and famed for its long white sand beach, already have a presence in San Vicente and have bought beachfront properties.

Tourism investors were eagerly awaiting the opening San Vicente Airport, with the passenger terminal under construction and removal of a hill in the path of the runway ongoing. The airport will jump start the full TEZ master plan including beach and mountain resorts, retirement village, agri-tourism and cruise ship facilities. San Vicente Airport and flagship TEZ enable TIEZA to exercise and expand its powers, described by Business Mirror as ‘infrastructure development; designation, regulation and supervision of TEZs; management of existing assets or facilitation of their privatization; and administration of the collection of the Philippine Travel Tax’.13
San Vicente TEZ (Tourism Economic Zone)
Indonesia’s tourism SEZs bestowed with beaches

In August 2016, unveiling a plan for ten major new tourist destinations and inviting investment from the tourism and real estate sectors Vinsensius Jemadu, director for Asia Pacific Tourism Promotions of the Indonesian Ministry of Tourism, said that SEZs will be set up for some of the priority destinations. Investors will enjoy non-fiscal incentives such as land tax reduction. James Hartono, president of the Indonesia Chamber of Commerce in China said that Indonesia’s many restrictions on foreign investment in the real estate sector do not apply to tourism investment. Fiscal incentives for investors in Indonesia’s SEZs, outlined in a 2015 presentation by the Indonesian Investment Coordinating Board, include exemption or deferral of income tax, import duties, VAT and excise. Additional financial support for SEZs from local government is promised including a budget commitment and local incentives. Investors are also assured of provision of transport infrastructure: airport, road, seaport and railway along with electricity, gas and water supply and an ‘Easy Process’ for securing land rights.

Already, three airport-linked SEZs have been designated for tourism: Mandalika, Tanjung Lesung and Tanjung Kelayang. The government is funding airport expansion and road networks to support the tourism SEZs, all three of which include long stretches of coastline with a wealth of white sand beaches. Addition of coastline to generous subsidies and infrastructure provision has bestowed investors with natural assets that are a cornerstone of tourism. Global hotel chains have entered Mandalika and Tanjung Lesung and embarked on construction projects in Tanjung Kelayang.

The Mandalika resort, 17 kilometres from Lombok Airport and boasting a 7.5 kilometre stretch of white sand beach, is a 1,200 hectare area designated by the government for development of hotels and resorts. The Mandalika Resort project, aspires to become the ‘new Bali’. Tourism schemes include 10,500 hotel rooms, 340,000 square metres of commercial and retail space, theme park, equestrian facilities and golf course. Government infrastructure support commitments to Mandalika SEZ include extending Lombok Airport’s runway. Major hotel chains - Novotel, Royal Tulip, Pullman and Club Med - are on schedule to break ground on developments in Mandalika in 2017.

President director of state-owned Indonesia Tourism Development Corporation (ITDC), Abdulbar M. Mansoer, said a budget of US$150 million would be allocated for development of Mandalika SEZ over a ten year period, the first phase focusing on supporting infrastructure such as power plants, roads and water supply plus a convention centre. The longer term masterplan includes a cruise ship terminal and yacht marina. ITCD claims to hold the land-use permit for a 1,171 hectare area, but reports that land ownership claims to 135 hectares of the Mandalika SEZ are an obstacle to investment. The land in question consists of 31 sites, mostly in strategic locations along the coastline. As of October 2016 the land disputes remained unresolved.

Tanjung Lesung is a serene, undeveloped peninsula ringed by a 13 kilometre shoreline with many white-sand beaches facing into the Indian Ocean. A government programme for accelerating tourism development was announced in December 2015, aiming for Tanjung Lesung to become a ‘novel gateway for tourists’ and an ‘integrated tourism area’ with facilities including hotels, restaurants, golf courses, theme park, marina and cruise ship port. The entire Tanjung Lesung peninsula, 1,300 hectares, has been designated as a tourism SEZ (Figure 3). In March 2017 it was announced that an airport is to be built about 10 kilometres southeast of Tanjung Lesung, in Panimbang, to support establishment the SEZ and tourism development in the wider region. The total land area allocated for the airport could be 1,500 hectares, sufficient for a major airport or an aerotropolis. An airstrip to accommodate charter flights is already under construction within Tanjung Lesung SEZ, making the area a type of mini-aerotropolis, a tourist resort with its own airport.

Tanjung Kelayang SEZ is a 364 hectare area designated for tourism located 20 kilometres from H.A.S. Hanandjoeddin Airport, the main airport on Belitung Island. It encompasses a stretch of coastline which includes the iconic Kelayang stones, idyllic islands and many white sand beaches. In September 2016 it was
announced that the government will develop H.A.S. Hanandjoeddin into an international airport to support the SEZ. A consortium of companies under the Dharmawangsa Group, with interests spanning real estate, oil and gas, construction and mining, has committed US$609 million to develop Tanjung Kelayang SEZ. By January 2017 a hotel was being constructed within Tanjung Kelayang, which was reported to be the fastest developing SEZ in Indonesia. Other projects underway in the SEZ included more hotels and two themed heritage areas with other facilities including villas and a marine centre in the pipeline.\textsuperscript{15}

**Thailand’s Eastern Economic Corridor (EEC) spans three provinces**

Thailand is offering up a significant proportion of its eastern seaboard to investors, but the emphasis is on industrial development rather than tourism. In December 2016 Thailand’s newly appointed Industry Minister, Uttama Savanayana, said that promoting SEZs, and development of the Eastern Economic Corridor (EEC) were at the top of the agenda. The EEC spans three provinces: Chonburi, Rayong and Chachoengsao (Figure 4). Progress on the existing SEZ development scheme, for investment in industrial estates in border areas, has been impeded because the projects triggered land price speculation and opposition from local communities.\textsuperscript{16} The EEC scheme is of a larger scale than existing industrial estates. A multitude of industrial clusters is envisaged within a designated area. The total land area is 13,285 square kilometres and the aim is for the EEC to become ASEAN’s (Association of Southeast Asian Nations) leading economic zone for industrial, infrastructure and urban development.

In February 2017 the government announced that, to support the EEC, development of U-Tapao Airport would be prioritised. The airport is to be expanded into a regional hub to bring more tourists to Thailand’s eastern beaches and as the focal point of interlinked transport megaprojects including a double track high-speed rail network and motorways. A key priority is surface transport links between U-Tapao Airport and Bangkok’s two main airports, Suvarnabhumi and Don Mueang.\textsuperscript{17} Sea port development to support the EEC includes expansion of Thailand’s biggest port, Laem Chabang, and upgrade of Sattahip Port with quays for ferries and cruise liners to accommodate 4,000 passengers per day, a business area and a four-lane road to U-Tapao Airport.\textsuperscript{18}

The Thai government anticipates that US$43 billion will be secured for development of the EEC over the next five years, from a combination of state funds, public-private partnerships (PPPs) and foreign investment. Ten industries have been prioritised: next generation automotive, smart electronics, affluent wellness and medical tourism, agriculture and biotechnology, industry and lifestyle robotics, aerospace, logistics and aviation, biofuel and biochemical, and medical services and healthcare. The EEC Bill, which would amend or suspend more than 100 laws and regulations that restrict foreign investment and lay out parameters for conducting business, was approved in principle in mid-April. This bonfire of regulations is to be accompanied by comprehensive incentives for investors in the EEC including income tax cut to 17 per cent, tax exemptions for foreign experts operating in key fields, 50 per cent reduction in corporate income tax for five years and free flow of foreign currencies within the EEC area. A US$288 million ‘competitive enhancement fund’ has been established to support targeted industries.\textsuperscript{19}

A network of citizens’ groups has decried exclusion of affected communities from the EEC project, claiming it has been pushed forward without public involvement. The Eastern Ally Network demanded disclosure of the most recent draft of the EEC Bill and public participation in the process. Director of Ecological Alert and Recovery Thailand director Penchom Saeteng said that a Regulatory Impact Assessment (RIA), as specified in the constitution must be conducted by a neutral agency, “to ensure that the newly formed EEC will not trade the rights of people to live in a healthy environment for privileges for investors”. She said that industrial development on the Eastern Seaboard had already caused severe land pollution and the investors responsible, having gained large profits, will be able to abandon at the end of the 50 year lease period with no responsibility for restoration.\textsuperscript{20}
Figure 4  Thailand EEC (Eastern Economic Corridor)
Somnuck Jongmeewasin, a lecturer at Silpakorn University’s International College, voiced concerns over the privileges being granted to foreign investors in the EEC, saying that the amendment or suspension of 100 Thai laws and regulations in order for foreign investors to benefit from special privileges, eliminating some legal protections afforded to Thai citizens, could lead to local people becoming “second-class citizens”. He expressed particular concern with regard to plans to offer up to over 1,000 square kilometres of land within the EEC to foreign investors, under lengthy 99 year leases, warning of massive land grabs.

The EEC plan goes beyond industrial parks, entire new cities for foreign investors comprising commercial areas, housing, hospitals and colleges. The EEC committee can select any land within the three provinces for development of SEZs, without regard for municipal regulations. Somnuck is sceptical about the prospect of the EEC leading to economic development as foreign investors will bring in their own workforces and compete with established businesses in sectors in which Thailand has become successful, such as tourism and agricultural processing.

Protest against the 99 year land lease policy, applying to state land in the EEC, stepped up a gear at the end of April. Concerned that the policy is more favourable to investors than current law, which limits leases to 50 years with provision for possible extensions to an additional 49 years, Network of Special Economic Zone Watch pledged to petition the Administrative Court to interpret whether the EEC Bill has been drafted correctly, saying that it discriminates against poorer people who want to use the land to maintain their livelihoods. They repeated calls for disclosure of the contents of the Bill and a public hearing, as called for in the constitution in cases where developments will have widespread impacts, which would be the case with expansion of industrial estates.

In May the government announced plans to attract 30 leading multinational firms to the EEC, with ten firms to be solicited within a year. Aviation industries are a key priority. Kanit Sangsuphan, secretary-general of the EEC office, said that Airbus intends to establish a maintenance and repair centre and the government intends to ask Rolls-Royce to set up an aero engine centre. Alibaba, a major Chinese e-commerce firm, plans to establish a logistics hub for distribution of goods throughout the ASEAN region in the EEC, facilitated by provisions of the new Customs Act specifying that import and export documents must be processed electronically and permitting repackaging of goods. Key infrastructure projects to support the EEC include upgrade of U-Tapao Airport and a new industrial zone near the airport.

On 2 May 2017 the Thai government reiterated its commitments to infrastructure development that will ‘jumpstart’ the EEC stating that capacity expansion of U-Tapao Airport is progressing as planned. There are plans for U-Tapao Airport to be developed into an aerotropolis. The first meeting of the EEC Development Policy Committee, chaired by Prime Minister Prayuth Chan-o-cha, agreed to the establishment of an ‘eastern aviation city’ or ‘Aeropolis’ near U-Tapao Airport to help promote the EEC. According to the Board of Investment of Thailand (BOI) special incentives for firms are the ‘most enticing ever’ offered in the country and include a corporate income tax exemption for a maximum of 15 years. Announcing the rollout of the EEC plan three weeks later the BOI listed tax breaks for qualified investment projects in the EEC, reiterating the exemption from corporate income tax for up to 15 years and stating that a personal income tax of 15 per cent would be the lowest rate in the ASEAN. At the beginning of June 2017 Deputy Prime Minister Somkid Jatusripitak asked Japanese transportation conglomerate Subaru Corporation to invest in aircraft parts manufacturing at U-Tapao Airport, where a 1,000 hectare area is to be developed into a special investment promotion zone for aviation, to incorporate aircraft related business, air cargo and warehouses, which will be a key component of the EEC.

Airport in Bagerhat to serve port, economic zone and coal power plant

In December 2016 it was reported that residents of nine villages in the Bagerhat District in southwestern Bangladesh, several thousand people, feared they might lose their land and homes as land was being acquired for a new airport. They were also concerned over the impact of filling in sections of three rivers and formed an organisation called the ‘Dwellings and River Protection Movement’. By February 2017 land
acquisition was underway for the new airport, called Khan Jahan Ali Airport. The project will be undertaken by the Bangladesh government at a cost of US$70 million, of which the government will contribute US$63 million with the remainder provided by the Bangladesh Civil Aviation Authority.

The Khan Jahan Ali Airport site is 20 kilometres northeast of Mongla Port, the second largest in the country, and the project is being undertaken in order to increase access to the port, Mongla Economic Zone and Rampal coal-fired power plant. Construction of Rampal power plant began in April 2017, in spite of vigorous opposition over devastating environmental damage and economic concerns regarding vast subsidies and financial risks. Exim Bank India is financing the mega coal plant, which would be illegal on Indian soil; the site is just 14 kilometres from the world’s largest mangrove forest, the Sundarbans, a biodiverse ecosystem hosting Bengal tigers, pythons, endangered crocodile and dolphin species and 260 bird species.

Over two million people’s livelihoods are dependent on the Sundarbans, predominantly from agriculture, fishing and shrimp cultivation. The 742 hectare power plant site is 95 per cent agricultural land and people were displaced without their consent and receiving inadequate compensation, with human rights violations being reported by South Asians for Human Rights. In addition to emitting vast amounts of climate damaging carbon dioxide, toxic gases and ash and discharge of chemical waste and contaminated water into the Passur River will damage the health of people and wildlife. Pollution would be even worse in the event of an accident. There have been many instances of vessels loaded with oil, coal and fertilisers sinking in Sundarbans rivers and damage to mangroves would make the coast more vulnerable to cyclones and storm surges. Resistance to the coal plant culminated in participation of 20,000 people in a five-day 400 kilometre march from Dhaka, the capital city, to Rampal.

The true cost of Rampal coal plant is obscured by subsidies of over US$3 billion from Bangladeshi and Indian taxpayers, including a 15 year income tax exemption, tax exemption for transport of machinery and equipment and a heavily discounted Exim Bank India loan of US$1.6 billion. The Bangladeshi government is also committed to continuous dredging of rivers to accommodate large ships. Incentives for economic zone developers listed by Bangladesh Economic Zones Authority (BEZA) include exemption from custom duty, stamp duty, dividend tax and VAT on local purchase excluding petroleum. Incentives for economic zone investors and users include: tax holiday, duty free import of raw materials, construction materials, machinery and finished goods, capital gains tax exemption, 50 per cent stamp duty exemption 80 per cent exemption on VAT on all utility services consumed inside the zone plus full repatriation of capital and dividend.

BEZA plans to establish 100 economic zones by 2030. Announcing BEZA’s land tariffs for economic zones, including Mongla, executive chairman Paban Chowdhury said that the tariff should be very reasonable in order for investors to get land easily. In April 2017 the government moved to prepare Mongla Port to handle transit goods and raw materials for Rampal power plant, sending a list of directives to the Ministry of Shipping, ordering river dredging and setting up a depot for fuel oil, power plant, water treatment plant, high capacity floating crane and conveyor belts.

**Dholera Airport – an aerotropolis to facilitate a 920 sq km Special Investment Region**

Plans for Dholera Airport, about 85 kilometres from the city of Ahmedabad, Gujarat’s largest city, include typical aerotropolis components including a hotel, commercial development and industrial areas, plus an MRO (Maintenance, Repair, and Overhaul) facility. The ministry of civil aviation granted in principal approval for Dholera Airport in January 2016. In addition to 1,426 hectares previously identified for the airport, allocation of 2,600 hectares of land for an ‘aviation zone’ was proposed. The ministry also stated that Dholera Airport will serve the logistics requirements of development of the 920 square kilometre Dholera Special Investment Region (SIR), a project which is also referred to as a ‘smart city’.
The Dholera SIR site spans 22 villages. Under the state government’s controversial ‘land pooling’ policy landowners give up their land to the government and benefit from the development upon it and provision of infrastructure, receiving a portion of it once facilities such as roads are built and the value thus increased. But the state government can take half of farmers’ land without giving compensation, the other half of the land can be at a different site. In January 2016 it was reported that farmers’ feared dispossession of their land for the DSIR. Activists claim that the proportion of land in Dholera that is fertile and cultivated is far higher than stated in the Environmental Impact Assessment. Crops grown on the land include chickpeas, wheat, cumin and, in the site earmarked for the airport, cotton. There were suspicions that delay in extending the canal network, which would enable farmers to increase yields, was a ploy to push them off their land, and some of the new sites being prepared for farmers under the land pooling scheme were in saline areas near the sea that would be difficult or impossible to cultivate. As farmers grappled with uncertainty over their future livelihoods real estate brokers dealing in sale and purchase of land gravitated to the area.

Unrest among residents facing eviction for Dholera SIR flared up again in February 2017 when thousands of farmers in one of six areas earmarked for a ‘Town Planning’ scheme were sent notices to vacate their agricultural plots. A farmers’ delegation to the Town Planning Officer said the notices were contempt of court as they were issued in spite of a stay order passed by the Gujarat High Court. Farmers in the Dholera SIR have long been suspicious that the Narmada dam was not being constructed, as was promised, to irrigate their fields, but would supply water to industry. In May 2017 Sagar Rabari, leader of the farmers’ organization Khedut Samaj Gujarat, said that the government was “working overtime to construct pipelines to take Narmada water to their industries”. In contrast, the Narmada canal network had still not reached farmers’ land and they were struggling for their “rightful share of the waters” as without irrigation they faced ruination of the following season’s crops.

Planners intend to make Dholera SIR a major hub for the defence industry, ‘an artillery and aerospace hub’. Plots of land measuring 8 square kilometres are being offered to global defence firms. Jagadish Salgaonkar, Senior Vice-President of Aecom, the Los Angeles based company handling the project, said that the land is government-owned and contiguous parcels can be handed over to investors, and the city is pumping in funds for infrastructure to enable firms to start operations. Salgaonkar explains the type of companies that will benefit: “Our target market is maintenance, repair and operations (MRO) facilities for aircraft, defence contractors and heavy machinery manufactures, which require huge land for inventory management.” The ‘defence’ manufacturing that planners aim to welcome to Dholera SIR includes the most lethal military equipment - artillery, tanks, jeeps and big guns.

The Gujarat state government’s 2016 Aerospace and Defence Policy offers investors incentives and tax breaks that are compatible with development of Dholera SIR as a defence hub. To aid allotment of land to investors, with special priority given to industries on the defence and aerospace sectors, the state will provide land for manufacturing units at 50 per cent of the ‘jantri rates’, the guideline price published by the state government. There is a 100 per cent rebate on stamp duty and land purchase registration charges, plus a waiver on electricity duty for a five-year period upon commencement of production. Tax relief of up to 90 per cent on fixed capital investment might be increased to 100 per cent.

Dholera Airport and the SIR are envisaged as key nodes in the planned Dedicated Freight Corridor (DFC), a 1,483 kilometre route running through six states. In turn, the DFC is nested within an even more gargantuan megaproject, forming the spine of the Delhi Mumbai Industrial Corridor (DMIC), which is promoted as the world’s largest infrastructure project, the railway linking to a container port in Mumbai that will be the biggest in India. Part of the DMIC vision is for Dholera to become an aerotropolis, a region driven by airport centric commercial activity, and approval of the airport has been recognised as helping drive forward the DMIC. In September 2016 Alkesh Sharma, COE and MD of the DMIC Development
Corporation, said that Dholera Airport will be an aerotropolis with non-airline earnings from commercial services and hotels surrounding the airport being key component of total revenue.\textsuperscript{40}

**Gwadar deep sea port, airport and economic zone**

In November 2015 the provincial government of Balochistan, Pakistan’s poorest state, handed over about 930 hectares of land in the coastal town of Gwadar to China for an SEZ. The project will be developed by state-owned China Overseas Port Holding Company (COPHC) under a 43 year lease. The economic zone is part of the China-Pakistan Economic Corridor (CPEC), a blueprint for 3,000 kilometres of roads, railways and oil and gas pipelines linking China’s Xinjiang region with the rest of the world via Gwadar Port. CPEC is part of China’s globe-spanning One Belt, One Road initiative. Land allocated for the Gwadar economic zone is adjacent to a deep sea port which was constructed at Gwadar in 2007, but has been barely used, and will be further developed under the CEPC. Access to Gwadar Port will reduce the distance that oil and gas imports from Africa and the Middle East have to be transported to reach China by thousands of kilometres.\textsuperscript{41} The lease agreement includes development of an international airport to cater for the needs of the port and economic zone and 1,214 hectares of land have been allocated for the project. In January 2017 China said construction of the airport and a four-lane road would begin soon, which would facilitate visits from international investors.\textsuperscript{42}

Massive tax exemptions were approved for Gwadar Port operators in May 2016. The Economic Coordination Committee (EEC) of the Cabinet of Pakistan approved a 23 year complete income tax holiday for businesses established in Gwadar Free Zone, a concession that will be extended to COPHC companies, contractors and subcontractors for 20 years. The EEC also exempted COPHC and its operating companies from income tax and the 12.5 per cent tax on dividend income and granted a 23-year exemption from sales tax and federal excise duty. However, these businesses will be subject to taxation for sales and supplies outside the free zone. An even longer tax exemption, for 40 years, has been approved for COPHC, its companies, contractors and subcontractors, on import of equipment, materials, plant, machinery, appliances and accessories for construction of Gwadar Port and the free zone. This customs duty exemption has also been extended to import of ship bunker oils for ships used in the port and its terminals.\textsuperscript{43} Pakistan is set to reap only minimal revenue from the port. Under the terms of a 40-year lease for Gwadar Port granted in April 2017 COPHC will retain over 90 per cent of revenue from Gwadar’s marine operations, plus 85 per cent of the revenue from the management of the adjacent free zone.\textsuperscript{44}

Land prices have in the town of Gwadar have skyrocketed. In 2016 real estate firm Rafi Group made a ten-fold profit on hundreds of acres of land it had acquired in 2004, following the government announcement of plans for the deep sea port. Rafi Group Chief Executive Shehriar Rafi acknowledged the risk inherent in real estate investment but expressed confidence based on the extent that sovereignty has been surrendered to China saying that “our confidence comes from knowing this is not a Pakistani initiative, but a Chinese city on the Arabian Sea coast. And the Chinese will see that it is built.”\textsuperscript{45}

Gwadar Port is located in prime fishing grounds which support the livelihood of thousands of fisherfolk for many centuries. Two semi-circular bays are protected by a hammerhead peninsula, making Gwadar the only spot suitable for year-round fishing. Gwadar fisherfolk are terrified they might lose their homes and livelihoods as the port expands and becomes fully operational, and the loss of fishing grounds also threatens boat building and repair, ice making and other ancillary trades. Already, Gwadar fisherfolk are banned from going out to sea on days when dignitaries are visiting, they have been excluded from a 2 kilometre long water channel next to the port, the prime fishing area and are concerned that fish and shrimp spawning grounds will be destroyed by port operations. It is thought that they may be relocated to Sur Bandar, where fishing is impossible between June and August because of high waves and where established fisherfolk are worried the fishing grounds could not accommodate such an influx. The president of the Sur Bandar fisherfolk organisation says there is already insufficient space for all the fishing boats to berth.
Gwadar fisherfolk are not reassured by promises of jobs at the port. Local employment opportunities have not been considered since construction of the port began in 2000 and there has been no vocational training. Prospective earnings at the port for unskilled labour will be a quarter, or even less, than they currently earn from fishing. There have been street protests against the port development but resistance is now being suppressed. Local people are intimidated against speaking against a project which the government regards as sacrosanct.

Locals were assured that port development would be in tandem with basic services such as schools, hospitals and roads, which have failed to materialise. Infrastructure development has focussed on Gwadar Port, which now has its own power plant, plans two more 150 megawatt power plants as it expands, and has an assured water supply with its own desalination plant with capacity to provide 380,000 litres per day. Meanwhile, the rest of Gwadar is subject to long power outages and local people have been dealing with a chronic, severe water shortage for over five years, the government repeatedly resorting to emergency tankers to deliver supplies door to door. The government has published a masterplan promising to solve water supply problems for the Gwadar population by 2050. But people need water now. At the beginning of 2017 water trucks were being escorted by military vehicles, many households were securing their water tanks with steel locks and bottled water was on sale at prices far higher than in the rest of the country.

Gwadar locals say they are being marginalised and intimidated by heavy militarisation of the area, focussed around the port. They are looked upon with suspicion and required to carry national identity cards, fishing licences and even photographs of their fishing vessels. In December 2016 the Pakistan Navy created a new task force specifically for defence of Gwadar Port infrastructure and workers, equipped with drones, aerial surveillance aircraft and missile boats. For protection of the entire CPEC project the Pakistan government has established a Special Security Division, consisting of nine army battalions with 9,229 personnel and six civil armed forces with 4,502 personnel.

China-Belarus Industrial Park adjoining Minsk Airport

China is the majority shareholder in China-Belarus Industrial Park, allocated a 95.5 square kilometre site, 50 per cent of which is forest, and strategically situated to the west of Minsk Airport and near the M1 highway running between Moscow and Berlin (Figure 5). The joint venture is 60 per cent owned by China National Machinery Industry Corp and 40 per cent by the Belarus government. The main purpose of the US$5 billion project is to function as a springboard for manufacturing and trade, acting as a staging post between the European Union and Russia. President Lukashenka said the industrial park is Belarus’s most important joint venture and the largest overseas industrial park that China is involved with.

Companies specialising in ‘advanced’ sectors such as electronics and biomedicine and committed to investing at least US$5 million are to be granted a 10 year exemption from profit and property taxes, with a 50 per cent reduction for a further 10 years. General Manager of the industrial park, Li Hiaxin, said “The extent of the favourable tax policies is rarely seen in the world”. China agreed to finance the development with low-interest loans conditional on half the money being spent on Chinese materials.

The plan is for the industrial park to serve as a manufacturing base for Chinese exporters and provide easy access for tax-free entry into Russia and Kazakhstan. As well as accessing high-value markets in western Europe, Chinese manufacturing firms will be able to take advantage of a lower manufacturing costs; the average wage of US$560 per month is half of the average wage of Polish workers. Along with eight industrial zones, including aviation logistics at the northern end of the runway, an entire new city is planned with hotels, exhibition and conference centres, golf courses, luxury residential areas, entertainment and a recreation zone. A second runway at Minsk Airport is scheduled to open in 2018. The Belarus government has estimated the cost at US$320 million and envisages allocating US$200 million for the project.

China-Belarus Industrial Park is part of China’s ‘One Belt One Road’ project, a network of land, sea and air corridors connecting China with Southeast Asia, Africa and Europe. In May 2017 head of the China-
Figure 5  China-Belarus Industrial Park

China-Belarus Industrial Park
92 Sq. Km.

Minsk Airport

Key

China-Belarus Industrial Park


Source: Esri, HERE, DeLorme, GESS, NGA, GEBCO, USGS, Giatra, GeoWorks, IGN, INEGI, ICPS, ISE, Jaxa, OpenMap, and the GIS User Community

Date: 14/02/2016
Belarus Industrial Park administration, Alexander Yaroshenko, said construction of infrastructure was ahead of schedule and expanded on the tax breaks offered to investors. Corporate taxes including land tax, profit tax and real estate tax are waived for ten years for the resident corporation and the investor, and equipment imported for investment projects is exempt from customs duties and value-added tax. The industrial park gives further benefits for corporations in terms of land acquisition as it is the only territory in Belarus where investors can buy land into private ownership, or as an alternative rent land on a 99 year lease.52

In May 2017 the Belarus Economy Ministry commented on newly published Decree No. 166, which enlarged the ‘territory’ of the industrial park to include Minsk Airport, bringing the total area to 112 square kilometres. Ministry representatives stressed the ‘exceptional preferential treatment’ for companies in the industrial park. The working group preparing Decree No. 166 demonstrated awareness of the global race to the bottom and determination to keep pace with it. After studying regimes for special economic zones in Eurasian Economic Union (EEU) countries, the working group expanded the list of tax preferences in the industrial park, reduced energy costs and simplified customs administration procedures.53

**Tax breaks for UK ‘Enterprise Zones’**

The tentacles of China’s globe-spanning network of infrastructure megaprojects extends to the UK. Launch of the first direct flights between Beijing and Manchester Airport in June 2016, by China-based Hainan Airlines, was hailed as a new Silk Route in the air, and supporting the One Belt One Road initiative.54 China is a key player in Manchester Airport City, the largest UK development project since the Olympics, under construction on a 64 hectare site to the north of the airport. Chinese contractor Beijing Construction Engineering Group (BCEG) holds a 20 per cent stake in Manchester Airport City, and plans for a ‘China Cluster’ on the site, consisting of two campuses, were unveiled in October 2015.

Manchester Airport City is the key development of a designated multi-site Enterprise Zone. Many greenfield sites are being paved over including parcels of land south of the district of Wythenshawe that were formerly designated as ‘greenbelt’, which had protected green space by ensuring strict controls on development.55 Another key development in the Enterprise Zone is the World Logistics Hub comprising 43 warehouses, office space and a car park. It is being constructed on former greenbelt land, in spite of resident’s opposition to the loss of fields which were used for grazing and provided a haven for wildlife with oak trees, hedgerows and a number of ponds occupied by Great Crested Newts, an endangered species unique to Northwest England.

One of the Manchester Airport City joint venture partners, Carillion, in a joint venture with construction firm Morgan Sindall, was awarded the £290 million public funds contract for building a 10 kilometre stretch of dual carriageway to the airport. The road, cutting through greenbelt land and woodlands with trees up to 400 years old, and projected to increase air pollution in areas where levels already breached EU legal limits, received planning permission in spite of vigorous opposition from communities.56

Amazon opened an enormous three-storey warehouse with a total floor area of 93,000 square metres in Manchester Airport City in September 2016.57 A worker at the new warehouse described deplorable working conditions and a miserable £7.65 per hour wage, speaking of ten-and-a half hour shifts undergoing repetitive tasks and unable to sit down. Employees in the warehouse are closely monitored and rigid rules are imposed with harsh discipline for the slightest infractions.58

Amazon, and other firms located in Manchester Airport City, will benefit from tax breaks. Firms locating in Enterprise Zones receive subsidies including a business rate discount of up to £275,000 per eligible business over a five year period, and in some instances tax credits are also available for research and development, plus enhanced capital allowances.59 These tax breaks for firms locating in UK Enterprise Zones are a marked contrast with a likely business rate increase looming over small businesses, which are anticipated to be worst hit by a revaluation. Half a million shops, pubs and restaurants have seen their business rates
increase, some by as much as 600 per cent, and many are worried that their businesses will no longer be financially viable. In response to an outcry from small businesses the government announced a relief package, but only some businesses impacted by a business rate increase will be eligible for assistance, which will be allocated by local authorities on a discretionary basis.60

Several other UK airport business parks are designated as or located within Enterprise Zones and benefit from tax breaks. A 10 hectare site at Doncaster Sheffield Airport has been designated as an Enterprise Zone and it is anticipated that, together with a new link road to the motorway, it will support airport growth.61 Developments in Blackpool Airport Enterprise Zone include a business park and warehouses and Lancashire Energy HQ, an energy sector ‘centre of excellence’ which has been backed with £6.2 million of Growth Deal funding.62 A 28 hectare commercial development called Century Park, supported by an access road, is planned at Luton Airport Enterprise Zone.63 Rochester Airport was granted Enterprise Zone status in December 2015 and a development named Rochester Airport Technology Park will be built on land adjoining the airport.64 Sites covered by Enterprise Zone status in South West England include Exeter Airport.65 In Cornwall, Aerohub at Newquay Airport is a designated Enterprise Zone. Public funding, consisting of £4.3 million form the European Regional Development Fund (ERDF) matched by £3.1 million from Cornwall Council, has been granted to build the first phase of offices and light industrial buildings.66

The UK government is also providing large amounts of funding for projects at privately owned airports. Southend-on-Sea Borough Council is to receive nearly £20 million funding for Airport Business Park Southend, to be built adjacent to Southend Airport which is owned by the Stobart Group.67 A planned technical skills college at Stansted Airport, owned by MAG, has received two £3.5 million grants from the South East Local Enterprise Partnership (SELEP) Local Growth Fund and Essex County Council. The curriculum will be geared towards careers in STEM subjects and aviation related fields including aircraft and airport engineering, logistics and supply chain management. Use of airport land is MAG’s contribution to the project.68 This preferential treatment for an educational institute that will specifically benefit the aviation industry takes place against a backdrop of a tightening squeeze on funding for schools in England, in particular for further education. Spending per further education student fell by 6.7 per cent between 2010-11 and 2015-16 and a further drop of 6.5 per cent is expected over the next few years.69

Proposals for restructuring of regional government are geared towards supporting development of a major freight hub that is currently under construction on land immediately to the north of East Midland’s Airport, the UK’s busiest cargo airport, handling volumes second only to Heathrow. A proposal for a Free Trade Zone, the first in the UK, around East Midlands Airport, offering tax breaks for businesses, is top of the list of pledges that negotiators for devolution of powers have requested from government. Second on this list is bringing forward construction of the nearest section of the planned HS2 (second high speed rail network), through Derbyshire, from 2032 to 2027. The SRFI project appears to be a high priority for the UK government, as it has proposed routing HS2 through the site.

Both of these policy proposals, the Free Trade Zone with tax breaks and the rail infrastructure, would serve the development of a major freight hub, dubbed the Strategic Rail Freight Interchange (SRFI). If the full plan is realised about 243 hectares of farmland and wildlife habitat, including woodlands, would be destroyed. An intermodal freight terminal – connected to rail networks and the trunk road system – aims to accommodate sixteen 775 metre long trains per day. A group of local residents and the parish council has campaigned against the loss of prime farmland and plant and animal habitats, further loss of farmland for road links, and the inevitable increased levels of noise, air and light pollution for residents in the locality. Opponents have also argued that the new development is unnecessary as there is plenty of empty warehouse space immediately to the east of the site in Castle Donington.70 By February 2017 construction of the first phase of the SRFI was underway, along with roadworks to provide access to the site, linking it to the M1 motorway and other major roads.71
Conclusion

New airport linked economic zones bring the short-term certainties of massive government expenditure on infrastructure and lucrative contracts for construction firms. Tax breaks will directly benefit investors, industrial park tenants and tourists enjoying holidays in luxury beachfront resorts. Tax revenues will be foregone and the tax base eroded for many years, even decades, into the future, for 20 years in the cases of IKIA, China Belarus Industrial Park and Gwadar, although the extent to which new economic zones will attract investors and become operational is uncertain. The purported wider benefits extending outside the boundary of the corporate enclaves, increased export income and economic growth, are uncertain and require a longer time frame.

Airport-linked economic zones accelerate the global ‘race to the bottom’ by providing geographically defined areas where deregulation and tax breaks, to serve the interests of big business, are maximised. The new economic zones must also be viewed within the context of broader economic justice concerns of tax breaks for aviation set to benefit investors, in particular the almost universal tax exemption of aviation fuel for international flights. Allocation of land assets to airports for generation of non-aeronautical revenue is another form of subsidy. Monetisation of airport land banks is accelerating worldwide as aerotropolis style development gathers pace.

Tackling tax justice issues raised by airport-linked economic zones will benefit from strengthened links with research and campaigning on the issues of megaprojects and land rights. Critique of megaprojects addresses many instances of severe negative environmental impacts and problematic finances, including massive outlay of public funds, complex investment webs and major cost-overruns. Major aerotropolis schemes are among the largest megaprojects being pursued by governments and, as with airport-linked economic zones, may incorporate, or be a key component of, an integrated complex of megaprojects. Land rights justice, like tax justice, is foundational to democracy. Land acquisition for airport-linked economic zones and aerotropolis projects frequently entails displacement of people and appropriation of farmland, although this is less well documented than land rights abuses relating to other types of development such as mining, oil and gas projects, dams and power plants. Economic zones have a clearly defined spatial footprint. This brings the opportunity to develop digital maps integrating geographical information with text, images and social media, which could be a powerful tool to help raise awareness.

The maps in this document were produced for GAAM by InTouch GIS Services (www.intouchgis.co.uk) using publicly available information.


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