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MTG. W/ PRESIDENT & SECY. COLEMAN

re: Aircraft Noise

Saturday, Sept. 17

10:00 a.m.

Cabinet Room



THE WHITE HOUSE

WASHINGTON

September 17, 1976

MEETING ON AIRCRAFT NOISE

Saturday, September 18, 1976
10:00 a.m. (45 minutes)
The Cabinet Room

From: Jim Cannon



I. PURPOSE

You requested this meeting to discuss the environmental and economic aspects of Secretary Coleman's proposed aircraft noise policy.

II. BACKGROUND, PARTICIPANTS AND PRESS PLAN

A. Background

You have had three previous meetings with Secretary Coleman and others on aviation noise: Monday, September 6; Thursday, September 9; and Saturday, September 11.

At the last meeting you told Secretary Coleman that you wanted to discuss the environmental aspects of aircraft noise with Russell Train, Administrator of the Environmental Protection Agency; Russell Peterson, Administrator of the Council of Environmental Quality; and Dr. John McLucas, Administrator of the Federal Aviation Administration.

Alan Greenspan also wanted to comment further on the economics of the Coleman proposal.

You also asked for an appraisal of the likely impact of the A-300B Airbus. To date 34 A-300's have been sold, and foreign airlines have taken options on 23 additional planes. The best analysts consider that the A-300 is not at this time a serious threat to US produced aircraft (Tab A).



B. Participants

Secretary William Coleman
John McLucas (FAA)
John Busterud (CEQ)
Russell Train (EPA)
Dick Cheney
Max Freidersdorf
Alan Greenspan
Jim Lynn
Paul MacAvoy
Jack Marsh
Ed Schmults
Bill Gorog
Jim Cannon

C. Press Plan

To be announced.



III. Talking Points

- A. The first objective of Bill Coleman's proposal is to alleviate problems associated with aviation noise. I have asked John McLucas, together with Russ Train and John Busterud (for Russ Peterson) to give me their assessments of the dimensions of the noise problem. Russ, would you begin?
- B. Bill Coleman's proposal contains financing plan to help the airlines pay the cost of meeting any new noise standards. Alan (Greenspan), what is your assessment of the airlines' capacity to meet any new requirements without Federal help?

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THE WHITE HOUSE

WASHINGTON

September 17, 1976

MEMORANDUM FOR:

JIM CANNON

FROM:

PAUL LEACH *Paul*

SUBJECT:

A-300B Airbus and the
Next Generation Medium
Range Aircraft

Airbus

The Airbus is a multinational joint venture currently concentrating in the medium range market. Development of the first aircraft began in 1969, the first flight occurred in 1972 and the first sales began in late 1974. Two models of the A-300 are currently in production, the B2 and B4. Both are powered by two underwing General Electric CF6-50C engines. The approximate price of the aircraft is currently about \$22 million.

Management and design leadership for the A-300 program is vested in the French firm Airbus Industrie. The aircraft is built by a consortium of manufacturers from four countries:

France
Germany

Aerospatiale
Deutsche Airbus (a partnership of
Messerschmitt-Bolkow-Blohm and
VFW-Fokker)

Netherland
Spain

Fokker
CASA

The main partners are the French and German companies.

The governments of the four participating countries have reportedly invested a total of at least \$1 billion in A-300 development and production to date, which is believed to represent about 85 percent of total program investment. They may be called upon for an additional investment of \$500 million in the aggregate.



011714

To date, 34 A-300-Bs have been sold with over half already delivered and in service. The purchasers are:

<u>AIRLINE</u>	<u>NUMBER</u>
Air France	9
AirInter (France)	3
Germanair	2
Indian Air Lines	3
Korean Air Lines	6
Lufthansa	4
South African Airways	4
Transavia	1
Trans European Airways	2
	<u>34</u>

These airlines have options on 23 additional planes.

The A-300-B2 and A-300-B4 are currently competitive in terms of range and/or capacity with certain DC-10, L-1011 and B-727 models. The A-300-B2 has a range of 2,074 miles, and the B4 a range of about 2,417 miles, somewhat less than U.S. - made, medium-range, aircraft. Standard seating for both series is about 220 passengers in mixed-class versions and 345 passengers in a high-density, all-economy version, somewhat less than in the DC-10 and L-1011 and about one and one-half times the seating capacity of the Boeing 727.

Apparently, the A-300 is the most technologically competitive foreign commercial aircraft ever produced. Because it is a two-engine plane, the A-300 uses less fuel per passenger mile on most routes as compared to the DC-10, L-1011 and B-727. However, to date the A-300 has not been a commercial success.

The A-300 has experienced slow sales since production began. However, the American competition has sold many more of each aircraft: about 240 of the DC-10s, about 160 of the L-1011s and about 1300 of the B-727s. Of course, these are older planes and most were sold before the Airbus was in production.

The strong competitive advantages of the A-300 are its fuel economy and its immediate availability (as contrasted to about a year and a half wait for the DC-10 and L-1011). The key competitive weakness of the A-300 is the lack of customer confidence in Airbus Industrie and the lack of demonstrated after-sales service. In the past airlines have generally had bad experience with earlier planes produced in Europe and the bad taste from this experience lingers on.



There has been some discussion of new variants on the A-300 B2 and B4. The most important variation might be the A-300 -B10 which would be a smaller 200 seat airplane which would compete with the proposed B-7X7 and DC-X-200.

New Generation Aircraft

The attached article from the latest Economist is the best, current discussion of the new aircraft development situation I have found. Within the past two weeks, the major European air show took place at Farnborough, England and a two-day international conference on aircraft replacement and new developments (arranged by the Financial Times) was held in London. This Economist piece is a follow-up to those events.

The conclusion of this article and my own investigations is that the U.S. manufacturers (probably Boeing) are likely to begin full development of next generation of medium range, 200-seat, wide-bodied aircraft by the middle or end of 1977 and that the U.S. will continue to retain its dominant position in the manufacture of commercial aircraft.

You might also be interested in the attached short report by Alan Benasuli at Drexel Burnham & Co. on Wall Street. Benasuli, who is considered the best aerospace analyst on Wall Street, indicates in this report and in a lengthy conversation we had this week that the commercial aircraft industry cycle has hit bottom and that the situation will continue to improve. He anticipates that Boeing will begin development of the new generation B-7X7 in the second half of 1977 (along with a couple of minority-interest partners from Japan and Europe) with production to remain in the U.S. and deliveries to commence in late 1981 or in 1982. He sees no appreciable competitive challenge from foreign consortia and manufacturers.

Also, the latest information on the proposed new A-300-B10 model is that Airbus has decided not to pursue development at this time (although this decision could be reversed).

Attachments



Billions and billions and billions to grab for

Aircraft and aero-engine makers were biting their nails at the Farnborough air show this week. With good reason: between now and 1985, something like \$45 billion (at 1975

in 1975-80 (Boeing's optimistic forecast is 9%), to the International Civil Aviation Organisation's fairly hopeful 10½%.

Most of the industry works on the assumption that growth will average about 7½% a year to 1985, followed by 5½-6½% in 1985-90. That would increase the number of passenger-miles flown in the non-communist world from the 400 billion last year to 825 billion in 1985 and to well over a trillion in 1990.

New designs cost more to make and less to run

It costs millions to make the simplest change to an aircraft design, let alone design a new model from scratch. So why not simply update existing types?

This is being done wherever possible. Nobody is planning a brand-new long-haul jet. McDonnell Douglas reckons that, at today's prices, it would cost at least \$2 billion to develop anew the DC-10—and makers have yet to get their investment back on the existing types. So tomorrow's long-haul jets will

BOEING (BA - \$40)
JULY COMMERCIAL AIRCRAFT STATUS2396
8/31/76
Alan Benasuli

The table on the back of this page shows Boeing's incoming orders, deliveries, and backlogs on a monthly basis for 1975, as well as the current status as of July 31, 1976. Only firm announced orders are recorded in this tabulation.

As evidenced in the table, Boeing's backlog of firm announced orders seems to have bottomed out in April and is now picking up. Orders received since the end of July include 6 727's for Eastern Airlines, 6 727's for American Airlines, and 3 747's for Qantas, the Australian airline. The Aviation Week & Space Technology issue of August 16 points to the probability of an increase in the production rate of the 727 to 8-10 units per month by the end of 1977 from the current rate of 5 units per month.

The preliminary agreement reached between McDonnell Douglas and the French government to develop an advanced version of the French Mercure has, in our opinion, put pressure on Boeing to begin a new commercial aircraft program. The most likely program is a 7X7 development, in which Boeing's share will be on the order of 50-60%, with Japan and Italy and other potential foreign partners sharing the balance. It was recently reported that Boeing and the Japanese Civil Transport Development Corp. are very close to an agreement on this development. The 7X7 is conceived as a 200-passenger, widebody, medium-range (2000 miles) aircraft, incorporating a "super-critical" wing and a new engine (probably United Technologies' JT10D currently under development) with much improved fuel consumption characteristics. We would expect a go-ahead on this program in the latter part of 1977 at the latest. Our guess is that the development bill for this new aircraft will be on the order of \$1-2 billion, with Boeing's share being on the order of 50-60%.

BOEING - MONTHLY COMMERCIAL AIRCRAFT STATUS
(in Units)

2397

ORDERS

	<u>1975</u>						<u>1976</u>					
	<u>707</u>	<u>727</u>	<u>737</u>	<u>747</u>	<u>MONTHLY TOTAL</u>	<u>CUMULATIVE TOTAL</u>	<u>707</u>	<u>727</u>	<u>737</u>	<u>747</u>	<u>MONTHLY TOTAL</u>	<u>CUMULATIVE TOTAL</u>
JAN	2	3	5	4	14	14	-	-	3	-	3	3
FEB	-	-	-	1	1	15	-	4	-	2	6	9
MAR	-	-	2	3	5	20	-	6	7	-	13	22
APR	6*	20	7	2	35	55	-	-	-	-	-	22
MAY	-	3	4	1	8	63	-	27	1	1	29	51
JUN	0	4	10	3	17	80	2	5	9	-	16	67
JUL	0	1	0	0	1	81	1	4	5	5	15	82
AUG	-	2	7	2	11	92						
SEP	1	3	-	1	5	97						
OCT	0	0	0	1	1	98						
NOV	0	9**	0	1	10	108						
DEC	0	4	0	0	4	112						
TOTAL	9	49	35	19	112							

DELIVERIES

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APR	1	8	5	1	15	58	-	6	4	4	14	40
MAY	-	13	5	3	21	79	-	8	3	4	15	55
JUN	2	8	5	2	17	96	2	5	4	3	14	69
JUL	0	3	3	2	8	104	1	4	5	5	15	84
AUG	0	5	1	3	9	113						
SEP	1	5	3	-	9	122						
OCT	1	10	6	2	19	141						
NOV	0	6	5	1	12	153						
DEC	1	9	3	3	16							
TOTAL	7	90	51	21	169							

BACKLOGS

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FEB	15	99	36	39	189	15	68	18	34	135
MAR	15	87	31	39	172	15	70	20	29	134
APR	20	99	33	40	192	15	64	16	25	120
MAY	20	89	32	38	179	15	83	14	22	134
JUN	18	85	37	39	179	15	83	19	19	136
JUL	18	83	34	37	172	15	81	21	22	139
AUG	18	80	40	36	174					
SEP	18	78	37	37	170					
OCT	17	68	31	36	152					
NOV	17	71	26	36	150					
DEC	16	66	23	33	138					

* 6 for the USAF.

** 7 to be leased.



Sat. mtg. folder

THE WHITE HOUSE

WASHINGTON

September 17, 1976

Max:

Points which may come up at the Aviation Noise meeting tomorrow:

1. Secretary Coleman has told the President that he believes that the next Congress will reduce the present 8% Federal tax on airline passenger fares to 6% and the 5% Federal tax on freight to 3%. The Airport Development Fund into which this money goes has more than a \$1 billion surplus now, and Coleman believes this mounting surplus will prompt the next Congress to reduce taxes. Jack Marsh, at our meeting last Saturday, indicated he thought this is likely.
2. In general, what would be the reaction in Congress toward a proposal to create a Federally-administered fund from which airlines would receive grants to buy new airplanes?

Jim Cannon

file
Memorandum

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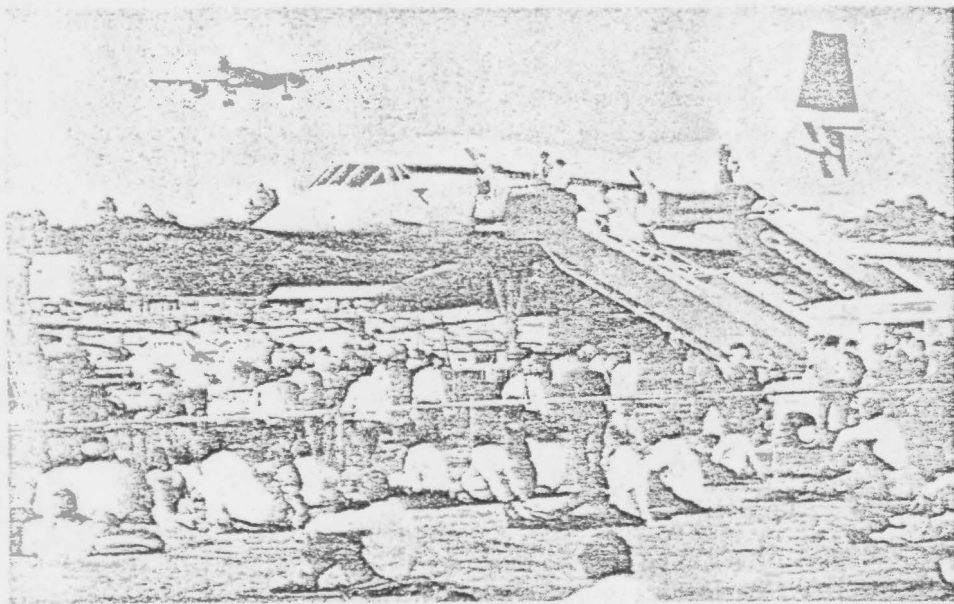
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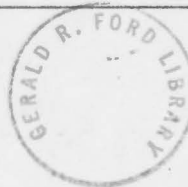
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BOEING (BA - \$40)

JULY COMMERCIAL AIRCRAFT STATUS

8/31/76

Alan Benasuli

2396

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BOEING - MONTHLY COMMERCIAL AIRCRAFT STATUS
(in Units)

2357

ORDERS

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TOTAL	9	49	35	19	112							

DELIVERIES

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JAN	15	107	39	39	200	16	64	20	33	133		
FEB	15	99	36	39	189	15	68	18	34	135		
MAR	15	87	31	39	172	15	70	20	29	134		
APR	20	99	33	40	192	15	64	16	25	120		
MAY	20	89	32	38	179	15	83	14	22	134		
JUN	18	85	37	39	179	15	83	19	19	136		
JUL	18	83	34	37	172	15	81	21	22	139		
AUG	18	80	40	36	174							
SEP	18	78	37	37	170							
OCT	17	68	31	36	152							
NOV	17	71	26	36	150							
DEC	16	66	23	33	138							

* 6 for the USAF.

** 7 to be leased.

9/18/76

The President today directed Secretary of Transportation William Coleman to make a comprehensive report on aircraft noise, including recommendations to be presented, by December 1, 1976 for presentation to the 95th Congress.

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The study is to include an evaluation of the airlines capacity to raise the capital to meet all commercial aircraft standards imposed on aircraft now being produced.



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P - What is failing the noise
decs on new planes?
What is demonstrated benefit?

new planes -
help planned noise.

Trans: Noise Control Act of
72 - would have given
noise decs to EPA

What further can we
do FAA & DOT put
on A/C noise -

w/ EPA proposing
regulations & FAA

While FAA must
publicly hear, etc.

We believe A/C noise is a
national problem - series
of local problems



very strongly in favor specific areas
always at airports

Trump moving this ~~area~~
is near + more citizen
opportunity to also open

20-30 airports where
there is significant public -
knowledge, interests.

IA wants to not stop element.

Real problem - but very much
tied to future health of
air transport & air cargo
industries.

Lack of Federal infrastructure
will matter.

EPA - proposes more stringent
4 vs 6 or 7

EPA - even lets a lot of
curious.

EPA & FAA agree on
detailed figures

We mean - FFA - shared
publish us - all officers
anymore shared to
plan & out a strategy
within 10 years time

We mean ? of judgment on these
ways can go.

Bring NO's to
90-100 deaths depending
on angles

10 death trip

Bertrand - Review data -
we do feel review
problem - trying to find

to small segment of pop.

environmental problem

danger to people who
not playing - being
"paid for" by people
who not causing problem.

user tax - right approach

We do see a need here -

would prefer shorter time frame

would like full survey &

environmental impacts

Paul W. Avery -

outlook -
total start H/L My mind. 80s
down to 1800
what - down for 600 - 200 -
upside of interest

600 - 700 of price can

Wicki comes a forward outlook
for A/L to some capacity
Some say volatility conditions
& what conditions.

D.L.J. - Ben Johnson is
regulation problem -
CAB market to D.C. & F.P.L.
will see into some
problem on the
under what price controls



CAB looks at Webster
put carts - puts real
decs on row

Helium is very efficient
below car to work on
the drum. clear to
open unit -

moving to subways
when very fast -
it's all to my paper.

That is road to r.v.'s

only 1 man down before
retroalizing occurs

If man stops very -
200 / 1800 - 200 at
then - still in over

+ not uploded —

the index of 200 —

about 100 — would
probably be uploded by
home & registers

What column then
des. to price 100

a/c trust of them
would? be —

or 3 or 4 articles

you were home for
to Delta & continue
which would have
~~the~~ bought anyway



Drift point - like pub
over ↓ the

only $\frac{1}{3}$ dollars is
down would have

We strongly up want
to get up to see
I can get an 'idea

drink up - to solve
capital ~~character~~ process

We don't see again
now -
This is a substitute
for my up

R # 3 ~~B~~ Fed of
4 B for place

lynn

Can't derive my from
purvis -

Is it a problem, given
overall picture of problems?

main = ~~A/C~~ x No of techs
✓ countries.
