

UK INTERNATIONAL AIR SERVICES

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Executive summary

1.1 International connectivity is vital to support the UK's economic growth. The UK is an island nation dependent upon its transport links to the rest of the world for its prosperity and we have made it clear that the UK's aviation networks and infrastructure have an important role to play in delivering sustainable economic growth.

1.2 This document:

- sets out the UK's international air services policy and what we are doing to support new international routes and services, and airports in Northern Ireland, Scotland, Wales and regional airports in England;
- explains the UK's aviation permit requirements and the airport slot allocation process in the UK; and
- provides information on the UK's main international airports.

Introduction

- 2.1 Aviation in the UK is largely privatised and operates in a competitive international market. The Government supports competition as an effective way to meet the interests of consumers. One of our main objectives is to ensure that the UK's air links continue to make it one of the best connected countries in the world. This includes increasing our links to emerging markets so that the UK can compete successfully for economic growth opportunities. To achieve this objective, we believe that it is important both to maintain the UK's aviation hub capability and develop links from airports which provide point-to-point services.
- 2.2 The demand for aviation in the UK is concentrated in south east England. London is an exceptionally well served capital city; its five major international airports (Heathrow, Gatwick, Stansted, Luton and London City) together serve more routes than any other European city, with Heathrow and Gatwick dominating the longhaul market.
- 2.3 Airports in Northern Ireland, Scotland, Wales and regional airports in England also play a very important role in UK connectivity. As well as delivering a range of domestic routes, they serve an increasing number of routes to mainland Europe. Although the long-haul market still accounts for only a small proportion of traffic at these airports, many now also serve a number of long-haul routes.
- 2.4 Air services to non-EU countries are governed by a complex web of bilateral Government to Government Treaties known as Air Services Agreements. The Department for Transport is responsible for managing the UK's existing Agreements and for negotiating new ones. This involves negotiating traffic rights from more airports in the UK to more destinations abroad, gaining access for more airlines to compete on routes which are already served, and gaining access to new routes.

Encouraging new routes and services

Liberalisation of air services

- 3.1 The opening up of air services to genuine competition has driven down the cost of air transport and greatly improved the range and quality of services available to the consumer. The Government's policy on air services is therefore to open up and liberalise the UK's bilateral Air Services Agreements so as to enable airlines to freely compete on a level playing field, delivering consumer benefits by permitting the operation of a wider range of services.
- 3.2 We will also continue to work closely with the European Commission and other Member States in seeking to develop liberalised EU-level Air Transport Agreements with other countries and to seek the relaxation of restrictions on cross-border investment in order to allow UK airlines greater access to foreign capital and to allow them greater freedom to invest in foreign airlines.

Extending existing fifth freedoms policy to Gatwick, Stansted and Luton

- 3.3 Fifth freedoms are the traffic rights granted to allow an airline of one country to land in a different country, pick up paying passengers and carry them on to a third country. These are valuable traffic rights and provide airlines with a wider range of commercial opportunities to the ultimate benefit of the consumer. The UK has long had a general presumption in favour of liberalising fifth freedoms from airports outside the South East. To improve connectivity at an international level and to help make better use of existing infrastructure at London's congested airports, we are currently considering¹ extending the UK's existing regional fifth freedoms policy to Gatwick, Stansted and Luton.
- 3.4 This policy would also be subject to the same conditions that apply to the UK's existing regional fifth freedoms policy, namely that the grant of such rights would be subject to a case-by-case

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¹ Draft Aviation Policy Framework published in July 2012 (see https://www.gov.uk/government/consultations/draft-aviation-policy-framework)

consideration within the context of the current position in the UK's bilateral aviation relationship with the country concerned (for example, we might not grant such rights if there were concerns that there were not a level competitive playing field in the market, such as if it were argued that the airline in question was in receipt of state aid that was distorting competition).

Supporting airports in Northern Ireland, Scotland, Wales and regional airports in England

The growth of airports outside the South East

- 4.1 We recognise the very important role airports across the UK play in providing domestic and international connections and the vital contribution they can make to the growth of regional economies.
- 4.2 Airports in Northern Ireland, Scotland, Wales and regional airports in England also have an important role in helping to accommodate wider forecast growth in demand for aviation in the UK, which could help take some pressure off London's main airports. The availability of direct air services locally from these airports can help reduce the need for air passengers and freight to travel long distances to reach larger UK airports.
- 4.3 We want to see the best use of existing airport capacity and, as a general principle, we support the growth of airports in Northern Ireland, Scotland, Wales and regional airports in England. However, we recognise that the development of airports can have negative, as well as positive, local impacts including on noise levels. We therefore consider that proposals for expansion at these airports should be judged on their individual merits, taking careful account of all relevant considerations, particularly economic and environmental impacts.

Extending regional liberalisation policy

4.4 For many years, the UK has sought to open up access to the airports outside south east England to improve opportunities for connectivity and to help reduce demand on airports in south east England. In the late 1990s the UK adopted an explicit open access policy, whereby other countries were offered, on a reciprocal basis, unrestricted access to airports in Northern Ireland, Scotland, Wales and regional airports in England, and in exchange UK airlines would have unrestricted access from these airports to those of the other country.

- 4.5 We are currently considering² offering bilateral partners open access to airports outside south east England in order to facilitate inward investment in new routes and extra choice for business and passengers without necessarily having to secure reciprocal access for UK airlines to the airports of the other country.
- 4.6 The granting of such rights would be subject to a case-by-case consideration within the context of the current position in the UK's bilateral aviation relationship with the country concerned (for example, we might not grant such rights if there were concerns that there were not a level competitive playing field in the market, such as if the airline in question was in receipt of state aid that was distorting competition).

² Draft Aviation Policy Framework published in July 2012 (see

Draft Aviation Policy Framework published in July 2012 (see https://www.gov.uk/government/consultations/draft-aviation-policy-framework)

Aviation permits

The permit regime explained

- 5.1 Like most countries, before operating to, from or within the UK, all foreign registered aircraft (i.e. those registered outside the European Economic Area (EEA)) must be in possession of an operating permit issued by the Department for Transport under the Air Navigation Order 2009. This requirement extends to all scheduled and non-scheduled (i.e. charter) passenger and cargo services that are not covered by the provisions of the European market access regulations, and to flights carrying out aerial work (e.g. photography, parachuting, flight training). Foreign registered aircraft require also permits under the appropriate air navigation orders before operating to the Isle of Man, Channel Islands and the UK Overseas Territories.
- 5.2 Before granting any operating permits for scheduled services, we ensure that the services proposed are operating in conformity with the traffic rights and conditions provided under the relevant bilateral air services arrangements. In the case of non-scheduled services, we seek reciprocity to ensure that UK and Community airlines established in the UK are allowed similar opportunities from the respective foreign authorities.
- 5.3 We also ensure that a number of administrative arrangements are completed before an operating permit is granted. These require airlines to provide valid certificates that are recognised by the International Civil Aviation Organisation (ICAO) on competency (i.e. air operators certificate), insurance, registration, aircraft airworthiness and noise and that aircraft are fitted with a recognised enhanced ground proximity warning system, airborne collision avoidance system and crews are aware of the UK approach ban requirements and comply with aerodrome operating minima requirements.
- 5.4 Further information on permits and application forms can be found at https://www.gov.uk/government/publications/aviation-permits.

 Applications should be sent to airlineoperatingpermits@dft.gov.uk at least 48 hours in advance of the proposed first flight.

Security Direction

5.5 In addition, any airline operating aircraft with a maximum take-off weight of 10,000kgs or more in the UK must also have a security Direction (known as the Single Consolidated Direction (Aviation) 2010) served on them and so applicants applying for a permit that involves such an operation should also contact surefaxupdate@dft.gsi.gov.uk for further information.

Advance Passenger Information

5.6 Finally, there is a long established UK legal requirement for airlines to supply Travel Document Information (TDI), also known as Advance Passenger Information (API), to the e-Borders system for passengers and crew on flights operating to and from the UK. This request for information is made under and in accordance with paragraphs 27 (in respect of crew information) and 27B (in respect of passenger and service information) of Schedule 2 to the Immigration Act 1971 and the Immigration and Police (Passenger, Crew and Service Information) Order 2008 (SI 2008/5)³. Failure to comply with the requirement to provide this information without a reasonable excuse is an offence under section 27(b)(iv) of the Immigration Act 1971. Airlines should contact e-borderscarriers@homeoffice.gsi.gov.uk for further information on how to comply.

³ Details of the legislation can be found at http://www.legislation.gov.uk/uksi/2008/5/contents/made, http://www.legislation.gov.uk/ukpga/1971/77/schedule/2/paragraph/27 and http://www.legislation.gov.uk/ukpga/1971/77/schedule/2/paragraph/27.

The slot allocation process in the UK

Introduction

The purpose of slot allocation is to make efficient use of airport 6.1 capacity and reduce the potential for congestion at airports which would lead to delays for airlines and passengers.

Legal basis

The allocation of slots at EU airports is an area of exclusive EU 6.2 competence and is governed by the EU airport slot regulations⁴ (the EU regulations), and associated UK implementing regulations⁵ (the UK regulations).

Definition of slots

6.3 The EU regulations define a slot as a right to use a bundle of airport facilities (runway, stands, terminals) for landing or take of an air service at a specific date and time.

Airport designations for slot allocation

6.4 'Slots' only exist under the terms of the EU regulations at airports that have been designated as 'coordinated', essentially those where airport capacity is shown to be insufficient to meet actual or planned airline operations. It is the Government's role to designate UK airports as 'coordinated'. Heathrow, Gatwick, Stansted, London City Airport, London Luton and Manchester airports are currently designated as 'coordinated'.

Role of coordinator

6.5 A 'coordinator' must be appointed to carry out slot allocation at these airports. The coordinator must fulfil a number of conditions. including being independent and functionally separated from any single interested party and acting in a neutral, non-discriminatory and transparent way. The Government has approved the appointment of Airport Coordination Limited (ACL) as coordinator at the UK airports mentioned above.

 ⁴ Regulation EEC 93/95 as amended by EC 793/2004
 ⁵ The Airport Slot allocation Regulations 2006

Slot allocation

- 6.6 Slots are allocated by ACL twice a year, for the IATA Summer scheduling season (broadly April to October) and the IATA Winter season (November to March). The total number of slots available to be allocated each season is determined by the airport operator, after discussions with airlines, air traffic control providers and ACL.
- The EU regulations provide that an airline retains the right to use a 6.7 slot provided it has used it for at least 80% of the time in the previous equivalent scheduling period, making allowance, if needed, for the effect of unforeseeable and unavoidable circumstances. Such slots are therefore allocated on the basis of historic (or grandfather) rights. Airlines are able to vary the details of slots for which they have historic rights, for example changing the time or aircraft size for which the slot was previously allocated, and still maintain their rights to them.

Allocating new capacity slots

- 6.8 Slots that are not allocated due to historic or grandfather rights have to be placed in a 'slot pool' to be allocated by ACL. Slots created by new airport capacity, such as new runways, would be placed in the pool.
- 6.9 The EU regulations prescribe how slots from the pool should be allocated. New entrant airlines have priority for 50% of these slots. A 'new entrant' is defined in the slot regulations as an airline that would have fewer than 5 slots at the airport on the day if pool slots requested were allocated to it⁶.
- 6.10 The remaining 50% of pool slots, along with any unallocated slots for which new entrants have priority, are allocated to incumbent airlines by ACL. Incumbent airlines have no entitlement to any particular share of new capacity slots not allocated to new entrants. In carrying out the allocation, where there are competing bids from airlines the coordinator must give priority to services with year round operation.

⁶ New entrant status is also available for airlines requesting slots for direct services between EU or domestic services under certain circumstances

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- 6.11 ACL also considers a range of other criteria⁷ in allocating slots for which there are competing bids, including the size and type of market, frequency of operations and 'local guidelines'. The latter are supplementary rules agreed by a committee of airlines using the airport, the airport operator, air traffic control providers and other aviation users. Local guidelines must be consistent with the EU regulation.
- 6.12 Airlines make no payment for slots allocated from the slot pool.

Slot transfers and exchanges

- 6.13 In addition to the allocation processes outlined above, the EU regulations also allow airlines to change the route for which they use an allocated slot; transfer slots between airlines within a group or as part of the acquisition or take-over of an airline by another; and exchange slots with other airlines. In all circumstances transfers and exchanges need to be approved by the coordinator, essentially to ensure they do not prejudice airport operations. Pool slots allocated to new entrants cannot be transferred or exchanged for two years.
- 6.14 At Heathrow and to a lesser extent Gatwick, some slot exchanges between airlines have been accompanied by financial and other considerations in a 'secondary market' for slots. The secondary market is an important way for airlines to increase their presence at airports such as Heathrow, given that the airport is effectively operating at full capacity and only a very small number of pool slots are available for allocation.

Roles of the Government and the UK Civil Aviation Authority (CAA)

6.15 The Government has a number of statutory roles and responsibilities under the UK regulations, including designating airports as coordinated and approving the appointment of a coordinator. But under the UK regulations the actual process of slot allocation is undertaken by ACL entirely independently of the Government, the CAA and other interested parties. The Government plays no part in, and is legally prevented from intervening in, the slot allocation process. This ensures that 'home' airlines receive no preferential treatment. It also means that

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⁷ These are based on the 'Worldwide Scheduling Guidelines' as published by the International Air Transport Association (IATA)

airlines can be assured that the slot allocation process undertaken by ACL is carried out in a neutral, transparent and nondiscriminatory manner, consistent with the IATA Worldwide Scheduling Guidelines and in line with a published process and set of criteria. The CAA advises the Government on issues relating to the development of slots policy, but has no statutory or regulatory role in this area.

London Heathrow

- 7.1 Heathrow is the UK's only major hub airport. More than 80 airlines operate services to over 180 destinations worldwide. The airport is located 10 miles from central London and can be reached in as little as 15 minutes with the Heathrow Express rail service. The airport also has excellent links by road and is connected to London's underground metropolitan rail line.
- 7.2 However, as Heathrow's runways currently operate at 99% of their permitted capacity, there are very low numbers of slots available for allocation by ACL in the short/medium term. The charts below show the Heathrow slot availability picture for Summer 2012:

RUNWAY MOVEMENT ALLOCATION - ARRIVALS Peak Week Movements per Hour - All times UTC



RUNWAY MOVEMENT ALLOCATION - DEPARTURES

Peak Week Movements per Hour - All times UTC



- 7.3 Moreover, at Heathrow the primary restriction on the availability of slots is the Air Transport Movement (ATM) cap imposed as a result of the planning approval granted for Terminal 5. This is set at 480,000 a year and the airport currently operates very close to this limit.
- 7.4 A small number of slots do become available from time to time, for example through airlines surrendering slots into the pool or losing them under the "use it or lose it" rule. It is for this reason that ACL advise any airline looking to secure Heathrow slots to apply for them in good time as much as one season in advance and to continue to apply for them each season if they are initially unsuccessful. ACL also advise airlines to take any slots that they may be able to offer them from the pool, even if they are less than ideal from a commercial or operational perspective, with a view to trying to improve their timing by subsequently swopping them with other airlines or through future seasons' coordination. Heathrow Airport Limited, the operators of Heathrow, offer airlines full support through the new entrant process.
- 7.5 Another option is for the airline to seek to buy or lease slots at Heathrow on the secondary market. Again, this is a "willing seller"/"willing buyer" market, and the Government plays no part in the process, and cannot force an incumbent airline operating at Heathrow to give up, lease or sell its slots to another airline. However, ACL can help airlines participate in this market, and have established a separate slot trade website⁸ that allows airlines looking to divest slots to market them to airlines wishing to buy or lease them.
- 7.6 An airline can also seek to obtain slots at Heathrow from its airline alliance partners. It is not uncommon for airline alliance partners to trade or exchange slots with their fellow alliance members, to maximise the economic benefit derived from the use of the slot for the alliance as a whole. Again, the Government plays no part in these trades, and they are a commercial matter for the airlines concerned.
- 7.7 As Heathrow has got busier, slot trading and alliance cooperation have become the principal means for airlines to obtain slots.

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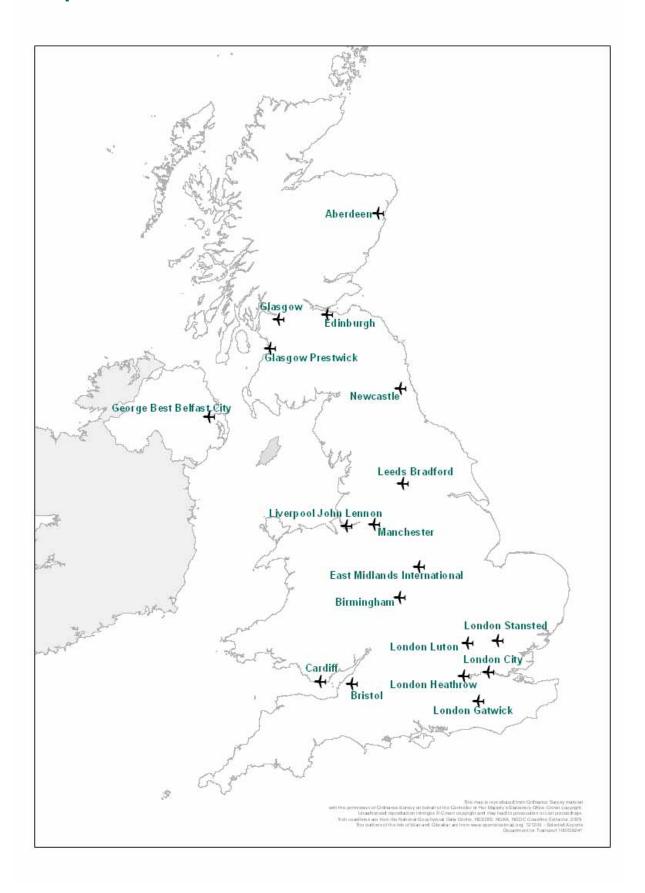
⁸ See http://www.slottrade.aero/

Contact

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Airline Business Development
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Hounslow
Middlesex
TW6 2GW

Tel: +44 (0)7917 555 550 Website: <u>heathrow.com</u>

Map



London Gatwick

Gatwick is the UK's second largest airport. It caters for nearly 34 million passengers a year, travelling with 48 airlines who fly to 197 destinations, in 90 countries - making it the best connected airport, in terms of destinations, of any in the UK. It has the UK's largest domestic and short haul international network, and the second largest long haul network.

Gatwick will complete a six year, £1.2 billion investment programme in new facilities in 2014. A further £1.1 billion has been proposed for the period after that. It has already completed a new security area, forecourts and immigration area. Recent new routes from Gatwick include Beijing, Seoul, Ho Chi Minh City and Hanoi.

Gatwick is located south of central London, and sits directly on a major rail line and beside a major motorway. There are approximately 12 million people who live within one hours drive of the airport. Its catchment area covers the UK's most affluent region and it is the best connected airport to capture central London traffic.

Gatwick is also London's best connected airport by rail. It is possible to travel directly to over 120 locations from the airport.

With the Gatwick Express, passengers can also travel non-stop direct into central London in 30 minutes, four times an hour.

London's financial district is 28 minutes away by rail via London Bridge. One of its key business districts, Canary Wharf, is 47 minutes away. Key tourist destinations can be reached within 48 minutes. All of these journey times are less than for other major London airports¹¹.

Airline operations are typically more profitable at Gatwick than they are at smaller airports in the London area.

Gatwick offers one of the lowest airport charging structures of any primary European airport, including Heathrow, Paris (Charles De Gaulle), Madrid, Milan and Rome¹².

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⁹ 2004 Population Data

¹⁰ Wealth and Assets Survey (Office for National Statistics) in Sterling

¹¹ All timings and comparisons from Travel Direct. The tourist destination example used is Buckingham Palace

¹² European airport charge index, review of airport charges 2010 (formally Jacobs)

Gatwick is rated the eighth best airport in Europe in terms of customer satisfaction ¹³. It consistently passes all regulatory targets for service quality. Passengers are greeted by a concierge team who speak 28 languages including Chinese dialects, Cantonese, and Mandarin. They enjoy access to a wide range of exclusive retail outlets and world class facilities for business passengers. These include two well known business brands on the airport site itself.

Location of airport

Lat: 510853N Long: 0001125W

Major runways

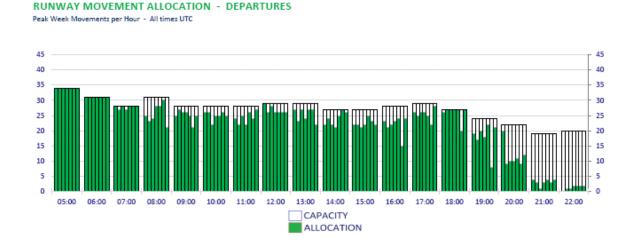
Asphalt: 3316m x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: A380, Boeing 747, Airbus 340 or similar

See DfT website for airport night noise restrictions

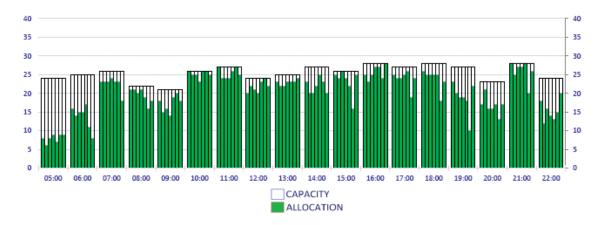
Slot availability (Summer 2012)



¹³ ASQ Survey

RUNWAY MOVEMENT ALLOCATION - ARRIVALS

Peak Week Movements per Hour - All times UTC



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London Stansted

London Stansted is in the right location, with the space, capacity and the right connections for the London. Stansted is the only airport serving London that has capacity for significant growth – up to 35 million passengers a year. It is London's third largest airport; has an iconic, award winning terminal that currently handles 18 million passengers a year but is spacious and uncongested.

Fast and frequent trains run directly between the airport and London Liverpool Street Station (in the City of London). Interchanges to the London Underground are at Tottenham Hale (Victoria Line) or Liverpool Street Station (Central, Circle and Metropolitan lines). Other long-distance train services link the airport with Cambridgeshire and the Midlands.

Located 48 kilometres to the North East of London and only 24 kilometres from London's orbital motorway (M25) – which also serves London Heathrow - Stansted has its own direct road link with the M11 highway.

The London Stansted catchment area sits in the UK's wealthiest region. An estimated 24% of the UK's businesses are in the London Stansted catchment. And the South East region of the UK shows the highest propensity to fly, most notably on scheduled services.

Location of airport

Lat: 515306N **Long:** 0001406E

Major runways

Asphalt: 3048 x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

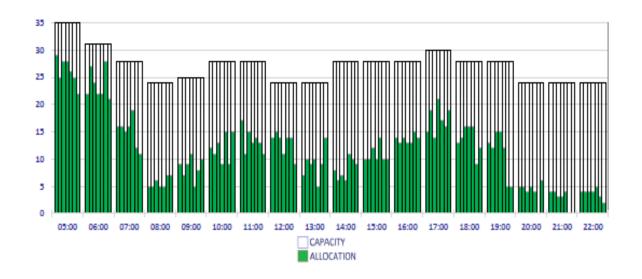
Upto and including Boeing 747, Airbus 340

Airbus 380 or similar when on divert or by specific arrangement

Slot availability - Summer 2012

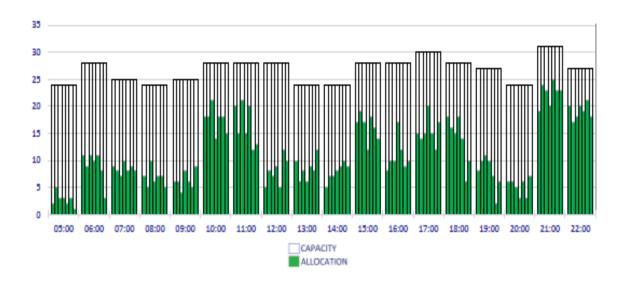
RUNWAY HOURLY MOVEMENTS - DEPARTURES

Peak Week Movements per Hour - All times UTC



RUNWAY HOURLY MOVEMENTS - ARRIVALS

Peak Week Movements per Hour - All times UTC



Proximity to Central London (indicative travel times)

By road: 1 hour

By public transport: 45 minutes

Local facilities

Trains, buses/coaches, taxis and hire cars

Nearest Railway Station: Stansted Airport

Stansted Airport Bus and Coach Station

Hotels: 3 within the airport

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London Luton

London Luton Airport is the UK's fifth largest airport, serving 100 destinations and handling over 9.5 million passengers in 2011. It is additionally the primary London gateway for executive jet operations facilitated by its convenient access to London's West End.

London Luton Airport strives to continually expand the range of destinations served, working with new and existing airline partners to develop the network and frequency of flights in response to the many opportunities presented by its strong catchment which includes a large segment of London.

London Luton Airport offers one of the UK's shortest check-in to gate distances, rapid aircraft turn-round times, minimal flight delays and 24 hour operations.

London Luton is located in an affluent and highly populated area to the north of London and adjacent to primary London – Midlands motorway and rail corridors. Over seven million people live within a one hour drive time of the Airport and a further 22 million within a two hour drive time. 17% of passengers in 2011 were business travellers and the Airport is within easy reach of major business and innovation centres.

Situated just 32 miles north of central London, the airport is conveniently located just two miles from Junction 10 of the M1 north-south motorway, eight miles from the A1 major north-south trunk road and 12 miles from the M25 London orbital motorway, facilitating ease of access from across the UK by road.

Well served by public transport, London Luton Airport has convenient rail connections from the adjacent Luton Airport Parkway train station. London St Pancras International rail station can be reached in a little as 21minutes by fast train and up to eight trains per hour connect to London and beyond as far as Brighton on the South Coast. Fast train services from Luton Airport Parkway also serve the East Midlands region and as far north as Leeds.

Location of airport

Lat: 515229N Long: 0002206W

Major runways

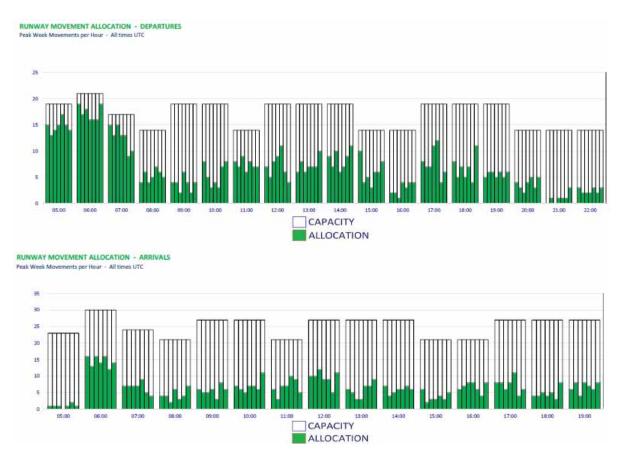
Grooved asphalt: 2160m x 46 m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: B772/A330

See London Luton Airport website for airport night noise restrictions

Slot availability - Summer 2012



Proximity to Central London (indicative travel times)

By road: 40 minutes

By public transport: five minutes to Luton Airport Parkway rail station by dedicated shuttle bus then from 21 minutes to St Pancras International. Up to 30 express coach services per hour to London Victoria, local and regional population centres.

Local facilities

Taxis and hire cars on site

Hotels: Three within the airport site and several within two miles

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Web: www.london-luton.com

London City

London City Airport is the only London airport situated in London itself, just three miles from Canary Wharf, seven miles from the City and 10 miles from London's West End and linked to all via the Docklands Light Railway. Infrastructure improvements in 2011 catered for 3 million passengers and 70,000 movements. The airport offers a unique 20/10 proposition – a 20 minute check in, from door to gate, and a 10 minute arrival, from plane to train. 10 airlines fly out of the airport, serving 43 destinations, seven of which are new for 2012, and the airport has permission to increase its operation to 120,000 movements a year. The airport has future plans for growth that will provide additional slot capacity over and above that which is available today. New infrastructure will also cater for the next generation of regional jets such as the Bombardier C-Series. Current customers include British Airways, SWISS, Lufthansa and Air France.

Location of airport

Lat: 513019N **Long:** 0000319E

Major runways

Grooved concrete, 1199m runway (see the UK NATS Aeronautical Information Publication for details)

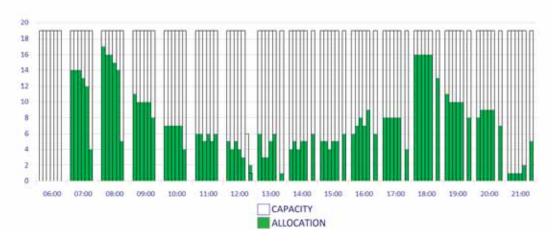
Aircraft types/size limitations

All aircraft need to be modified for steep approach for 5.5° glide slope. Largest aircraft A318, E190 and Avro RJ100. E170/135, DH8-400/300/100, ATR 72/42, F50, D328 also cleared. Future aircraft could include Bombardier C-Series and Mitsubishi MRJ

Slot availability (Winter 2012/13)

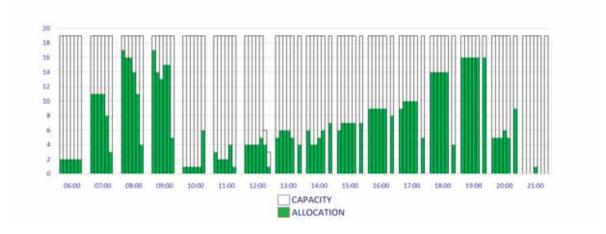
RUNWAY MOVEMENT ALLOCATION - ARRIVALS

Peak Week Movements per Hour - All times UTC



RUNWAY MOVEMENT ALLOCATION - DEPARTURES

Peak Week Movements per Hour - All times UTC



Proximity to Central London (indicative travel times)

By public transport (Docklands Light Railway/London Underground)/Road:

Canary Wharf – 14 minutes/10 minutes

Bank of England – 22 minutes/25 minutes

Westminster – 30 minutes/35 minutes

Local facilities

Docklands Light Railway, buses, taxis, hire cars

Nearest DLR station: London City Airport

Hotels: six within one mile, several within two miles

Contact

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Manchester

Manchester Airport is the UK's third largest airport and the only two runway airport outside of Heathrow. Currently welcoming around 19 million passengers a year, Manchester serves over 190 destinations, with recently added new routes to destinations such as Russia. Codeshare agreements between established long and short haul carriers, such as flybe, have established Manchester as a secondary hub for UK regional towns and cities.

Alongside the airport is Airport City, a unique destination in its own right, creating over 4 million square feet of quality business space over a phased delivery of 15 years. Offering warehouses, offices, hotels, conference and retail facilities, alongside global links to major world cities, Airport City will become an international business destination with major airlines such as Etihad already locating their European call centre at the airport.

Manchester is rated highly for customer satisfaction, and was named the UK's best airport with over 6 million passengers at the AOA awards 2012, as voted for by airlines. It is the third most visited city in the UK for international visitors, behind only London and Edinburgh, and enjoys a thriving arts and sport scene.

The airport has strong surface access with 24 hour train and bus services, which will be further improved when a Metrolink extension connects the airport to Manchester City Centre by 2016. In addition to this, the airport benefits from rapid motorway links across the UK, meaning that one third of the UK population is within a two-hour travel time, making the airport the gateway to the North of England. The airport catchment area has very little overlap with that of Heathrow, meaning that it is well placed to serve England and Scotland, as well as Wales.

Location of Airport

Lat: 532114N Long: 0021630W

Major runways

Concrete/Un-grooved Asphalt: 3048 x 45m and Concrete/Grooved Asphalt: 3050 x 45m¹⁴

The two runways are 390m apart and staggered by 1850m to comply with ICAO rules for Simultaneous Operations on parallel or near-parallel Instrument Runways (SOIR) (see the UK NATS Aeronautical Information Publication for details)

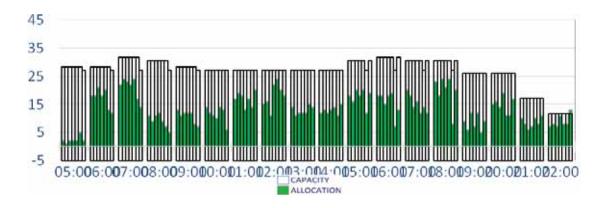
Aircraft types/size limitations

Largest aircraft: A380, Boeing 747, or similar

Slot availability (Summer 2012)

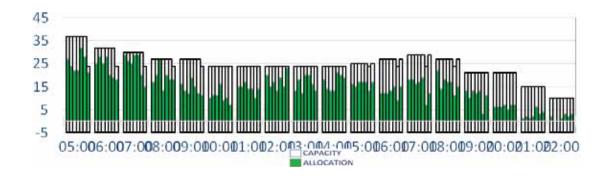
RUNWAY MOVEMENT ALLOCATED - ARRIVALS

Peak Week Movements per Hour - All times UTC



RUNWAY MOVEMENT ALLOCATED - DEPARTURES

Peak Week Movements per Hour - All times UTC



 $^{^{14}}$ Runway 23L has a starter extension of 150 x 30m

Proximity to Central Manchester (indicative travel times)

By road: 20 minutes

By public transport: Trains run every 10 minutes to/from Manchester Piccadilly station in the city centre, taking around 20 minutes

Local facilities

Trains, coaches, 24 hour bus services, taxis, hire cars and chauffer services

Various car parks available on site, including Meet & Greet and Valet parking

Nearest railway station: Manchester Airport – direct services to Manchester city centre

Hotels: 4 within the airport and several within 2 miles

Contact

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Commercial Director Aviation (Charter & Low-cost)

Manchester Airport

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Edinburgh

Edinburgh Airport is Scotland's busiest airport and serves the UK's largest tourist market outside London. Over 3.4 million people visit the city annually enjoying the attributes that have seen Edinburgh voted one of the top 25 favourite places in the world to visit.

The capital city of Scotland, Edinburgh is Europe's fourth largest financial centre. It also boasts a world leading life sciences sector and is the seat of the Scotlish Government.

The airport works with 40 airlines to transport around 9.4 million passengers annually to approximately 140 destinations. The 50:50 passenger flow and 85% ABC1 passenger profile is the envy of many.

The airport is the most accessible airport in Scotland given the proximity to the motorway network and both Glasgow and Dundee within an hours' drive. Transport connectivity is also due to further improve with the opening of a new tram route and train station in 2014 which will enhance links to the train network enhancing both the airports catchment and passengers opportunities to travel with ease in Scotland and beyond to the rest of the UK.

The airport was recognised in both 2011 and 2012 as the "Best European Airport 5-10m Passengers" at the Annual ACI EUROPE Best Airport Awards. The airports also picked up accolades at the Airport Service Quality awards. Recent awards reflect not just the quality of the infrastructure at Edinburgh Airport but the people who work at the airport who have also been identified in a recent survey as the friendliest airport staff in the UK.

Location of airport

Lat: 555658N Long: 32148W

Major runways

Asphalt: 2,557m x 46m and secondary runway (asphalt: 1,798m x 46m) used as a contingency runway (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: Can accommodate Code E aircraft.

Proximity to Edinburgh (indicative travel times)

By road: 20-25 minutes

By public transport: 25 minutes to the city centre by bus with a frequency of every ten minutes. Travel time will be less by tram when it opens.

Local facilities

Buses, taxis and hire cars are available along with coach parking

Nearest main railway station: Haymarket Edinburgh has trains to other Scottish cities, such as Glasgow, Dundee, Stirling and Aberdeen as well as England. A new railway station adjacent to the airport is due to open in 2014

Hotels: 1 on-airport and several within 2 miles. Another on-airport hotel is due to open in late 2013

Contact

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Gordon Robertson Communications Manager Edinburgh Airport Limited Tel: +44 (0)131 344 3174 Mob: +44 (0)7785372961

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Birmingham

Birmingham Airport serves 9 million passengers per year, and is located only 10 kilometres from the centre of the UK's second largest city, Birmingham. The airport is perfectly situated to serve the entire Midlands region, which contributes more to UK GDP than any other region outside the South East. Over 10 million people live in the Midlands which are also well known for being the manufacturing centre of the UK and the home of companies such as Jaguar Land Rover, Cadbury and JCB.

Birmingham Airport has excellent motorway and rail links, and the onsite mainline rail station has regular and direct services to Birmingham (15 minutes) and London Euston (1 hour and 15 minutes). Birmingham Airport also has many bus and coach services and six on-site car hire companies.

Birmingham Airport's excellent location and modern, efficient facilities make it popular with both passengers and airlines. Some of the major airlines already operating at Birmingham include Emirates, United Airlines, Lufthansa, Monarch Airlines, KLM, Air France, Turkish Airlines and Flybe. As a result, Birmingham is well connected domestically, into Europe, to North America and to the Far East. However there are still many underserved destinations from Birmingham including the USA, India and China.

Birmingham Airport welcomes airlines wishing to develop their services and may offer discounts to the published charges in order to encourage this. Please contact the airports using the details below for further details.

Location of airport

Lat: 522714N Long: 0014453W

Major runways

Asphalt: 2599m x 46m. The runway will be extended to 3000m by 2014 (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Existing airlines operate up to B777-300

A380 diversion capability

Runway extension will allow larger aircraft to operate without weight restriction

24 hour operation

Proximity to Birmingham (indicative travel times)

By road: 25 minutes

By public transport: 15 minutes to New Street Station

Proximity to Central London (indicative travel times)

By road: 2 hours 15 minutes

By public transport: 1 hour 15 minutes to Euston Station

Local facilities

Trains, coaches, buses, taxis and hire cars

Nearest railway station: Birmingham International (on-site) – direct services to Birmingham New Street, London Euston and Manchester Piccadilly

Hotels: 3 at the airport terminal and others in the local area

Contact

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Glasgow

With some 20 airlines serving around 100 destinations worldwide, including Canada, the US, the Caribbean, Europe, North Africa and the Gulf, Glasgow is Scotland's principal long-haul airport as well as Scotland's largest charter hub. Carrying seven million passengers per year, Glasgow Airport serves more Scotlish destinations than any other airport and is a key component of Scotland's transport infrastructure.

The Glasgow City Region is an economic powerhouse, both in a Scottish and UK context, and the connectivity provided by Glasgow Airport is a major factor in this success. Glasgow is Scotland's largest city with the most number of businesses (28,515), most jobs (561,000), highest economic contribution (£24.9 billion) and greatest amount of export activity (25% of all Scottish exports).

The airport enjoys a privileged position on the west coast of Scotland, approximately six miles from Glasgow city centre and prides itself on its fast, efficient and friendly service. It is the only airport in Scotland with direct motorway access.

Location of airport

Lat: 555219N Long: 0042559W

Major runways

Asphalt: 2665m x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: Boeing 747, Airbus 340 or similar

See DfT website for airport night noise restrictions

Proximity to Glasgow City Centre (indicative travel times)

By road: 20 minutes

By public transport: 25 minutes to Glasgow Queen Street

Local facilities

Coaches, taxis and private car hire

Nearest railway station: Paisley (Gilmour Street)

Hotels: Five within the airport campus and several within two miles. Glasgow has more choice of hotels and rooms than any other city in Scotland

Contact

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Bristol

Bristol Airport handles approximately 6 million passengers a year. It is the UK's ninth largest airport, and the fifth largest outside London. Over 100 destinations across 30 countries are served by direct flights, including 13 European capital cities. Bristol has been one of the fastest growing airports in the UK over the last 10 years. Planning permission is in place to develop and enhance facilities to enable Bristol Airport to handle 10 million passengers. The airport is situated eight miles south of the city of Bristol and fifteen miles from the World Heritage City of Bath.

Location of airport

Lat: 512257.61N Long: 0024308.72W

Major runways

Asphalt: 2011m x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: Boeing 767-300

The airport is open 24/7 but between 2300–0700 (local) prior permission required. A night surcharge will apply to all landings between 2200-0700

See UK NATS Aeronautical Information Service website for airport night noise restrictions

Proximity to Bristol (indicative travel times)

By road: 20 minutes

By public transport: 25 minutes to Bristol Train Station (Temple Meads) or 30 minutes to Bristol Bus Station

Local facilities

Buses, taxis and hire cars

The Bristol Airport 'Flyer' Express bus service links the airport to Bristol Temple Meads station, Bristol bus station, and city centre hotels. In 2010 the entire fleet was replaced with 12 new buses, with frequency increasing to every ten minutes during peak periods.

Nearest railway station: Temple Meads Railway Station

Hotels: Several hotels available within 4 miles of the airport

Contact

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Liverpool (John Lennon)

Liverpool John Lennon Airport is the airport for the Liverpool City region and a gateway to the North West of England and North Wales, the UK's most densely populated region outside of London. Since 2010, Liverpool Airport has been part of the Vantage Airport Group, an industry leading investor, developer and manager of airport assets. They have invested heavily to create an excellent passenger experience and one of the UK's most efficient regional airports.

From world famous architecture and magnificent museums, world famous football clubs, to music legends revolutionising popular culture, Liverpool is a city like no other. Attracting millions of visitors every year, the city is one of Europe's leading tourism destinations with an annual visitor spend of £2.8 billion a year and has recently been voted Britain's Friendliest city and Top 5 Visitor Destination by Conde Nast Traveller Magazine 2011.

Liverpool and the North West of England is one of Europe's most successful business destinations. It is home to seven million people and 230,000 companies and is one of the UK's largest regional economies – worth £106 billion. That's bigger than a lot of European countries, including Denmark and Finland.

The airport's support to its customers is based around simple principles; providing a 'best in class' operationally efficient facility, industry leading operating costs and an innovative package of sales and marketing support. The airport looks forward to doing business with you.

Location of airport

Lat: 532001N Long: 025059W

Major runways

Asphalt 2,285m and 2,162m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

No restrictions: capable of handling any wide-bodied 4-engine type aircraft. 24 hour operation

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Web: www.liverpoolairport.com and www.robinhoodairport.com

Newcastle

Newcastle Airport is the North East's largest airport. It welcomes around 4.3 million passengers a year flying to around 80 destinations.

The airport is situated 6 miles northwest of Newcastle city centre, and benefit from connections to the Metro light rail network and trunk road access to the A1 motorway.

It supports 3,200 jobs on site and a further 4,600 across the region, and the presence of the airport contributes significantly to the North East economy.

The airport's aim is to become the most welcoming airport in the UK, and we have created staff training schemes and customer engagement initiatives to achieve this aim.

Location of airport

Lat: 571450N **Long:** 418661E

Major runways

Marshall Asphalt: 2329 x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: B747, A340, AN-124 or similar

Proximity to nearby cities (indicative travel times)

By road: Newcastle: 15 minutes

Sunderland: 45 minutes Durham: 35 minutes

By public transport: 25 minutes to Newcastle Central Station or 50 minutes to Sunderland

Local facilities

Metro system, buses, taxis and hire cars

Petrol station on site

Hotels: 3 in immediate proximity to the airport and several more within 3 miles

Contact

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Newcastle International Airport Limited

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East Midlands International

East Midlands Airport is the UK's largest freight airport, handling around 300,000 tonnes of freight per year. Currently welcoming around 4.3 million passengers a year, East Midlands serves over 90 destinations. Consistently ranked high with passengers, the airport was also named 'Airport of the Year 2011' for the second consecutive year at the National Travel Trade Gazette awards, voted for by travel agents and independent industry observers.

Location of Airport

Lat: 52.83111N **Long:** 1.32806W

Major runways

Grooved Asphalt: 2893 x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Freight: Unrestricted, largest aircraft Antonov 225
Largest aircraft: Aircraft up to ICAO RFFS Category 8. Category 9 with

24 hours notice

Proximity to Central Nottingham (indicative travel times)

By road: 25 minutes

By public transport: Buses run every 30 minutes, taking around 55

minutes

Proximity to Central Derby (indicative travel times)

By road: 25 minutes

By public transport: Buses run every 30 minutes, taking around 40

minutes

Proximity to Central Leicester (indicative travel times)

By road: 30 minutes

By public transport: Buses run every 60 minutes, taking around 53 minutes

Local facilities

Coaches, 24 hour bus services, taxis and hire cars

Various car parks available on site, including VIP Meet & Greet

Nearest railway station: East Midlands Parkway (approximately 6.5 miles) – services to/from Lincoln, Sheffield and London

Hotels: 4 within the airport and several within 2 miles

Contact

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Aberdeen

Aberdeen Airport served 3.1 million passengers in 2011, with flights to over 40 destinations by more than 20 airlines. This represented a growth of over 11% on figures for the previous year.

Of those 3.1 million passengers, almost 500,000 of them were helicopter passengers going on or offshore, serving the thriving North Sea Oil and Gas industry from Aberdeen Airport. Those passengers help confirm Aberdeen Airport status as the busiest commercial heliport in Europe. A higher than average percentage of business travel (56%) supports the whole spectrum of the North East economy.

The airport opened back in 1934 and since then has grown to an international gateway with four runways (one main runway and three helicopter runways), 5 terminals, and which supports job for around 3,000 people.

Location of airport

Lat: 571209N Long: 0021153W

Main runways

Grooved asphalt 1953 x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft – 52m wingspan

Proximity to Aberdeen city centre (indicative travel times)

By road: 30 minutes

By bus: Jet Bus 727 direct to city centre in 20 minutes, by rail from Dyce station to Aberdeen station in 5 minutes

Local facilities

Trains, coaches, buses, taxis and hire cars

Nearest railway station: Dyce station

Hotels: 2 Hotels in airport property (Thistle and Speedbird), 2 further in Dyce (Menzies and Marriott) with 1 further Hotel under construction adjacent to airport property (a further Marriott)

Contact

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Don Jacobs, Commercial Director Aberdeen Airport Limited Email: don jacobs@baa.com

Sarah Campbell, Communications Manager Aberdeen Airport Limited

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Jan Emery, Route Development and Marketing Manager Aberdeen Airport Limited Email: jan emery@baa.com

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Leeds Bradford

Leeds Bradford International Airport located in the heart of Northern England serves Yorkshire, the largest region of the UK which has a population of 5.6million.

The airport presently welcomes 3 million passengers a year flying with 13 airlines to 75 destinations across 24 countries and is expected to be one of the fastest growing regional airports over the next 5 years with traffic likely to grow to 5 million by 2017.

Leeds is the UK's third largest city with a population of 761,000 and Bradford the seventh largest with 489,000. The airport's near catchment area serves a further 8 major towns and cities within a 40 minutes drive time. The airport's location is greatly assisting regional businesses by deliver increased international connectivity alongside delivering easy access to the Yorkshire region for inward investment and supporting inbound tourism especially to the major heritage city of York.

The Leeds city region which is the largest metropolitan region outside of London, has significant corporate strengths across the financial, professional and legal services (largest outside London) and the healthcare and manufacturing sectors (second largest in UK). The Leeds city region is also home to a fast growing food and drink sector and the largest student cluster outside South East England.

The airport has the wealthiest regional passengers across the UK (CAA 2011), the highest percentage of A/B business passengers outside London and offers a culturally diverse passenger mix unique for a regional airport. The airport is therefore ideally placed to deliver new direct long haul links to the US, Canada, the Gulf, the Indian subcontinent alongside supporting our direct services to Pakistan. The airport would warmly welcome the introduction of new long haul services to LBA to serve the regional marketplace alongside the continued development of our short haul route network across Europe.

The recent investment of £11 million in the airport infrastructure now offers airlines and passengers a comprehensive range of new and upgraded facilities alongside providing exceptional customer service. With no slot constraints and with capacity available to deliver a range of new international services, the airport is well placed to serve additional air demand to/from Northern England and supporting the major urban

conurbations of Leeds and Bradford alongside the wider Yorkshire region.

Location of airport

Lat: 535157N Long: 0013938W

Major runways

Concrete/Asphalt: 2250m x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: B777-200

Proximity to Leeds City Centre (indicative travel times)

By road: 20-25 minutes (8 miles)

Proximity to Bradford City Centre (indicative travel times)

By road: 20-25 minutes (8 miles)

Local facilities

Regular buses link the airport with Leeds, Bradford and Harrogate year round

Private hire and major car rental on site

Nearest city railway station: Leeds or Bradford

Nearest local railway station; Horsforth or Guiseley

Hotels: 3 within 2 miles of the airport

Contacts

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David Smillie Head of Airside Operations Leeds Bradford International Airport

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George Best Belfast City

Belfast City Airport is situated just five minutes from the centre of Belfast, and serves a network of UK and European destinations. In 2011, it saw 2.3 million passengers use the airport. The passenger base is predominantly business travellers, who seek to take advantage of the compact and efficient airport environment. We also serve a strong 'visiting friends and relatives' market, particularly for UK domestic destinations.

Location of airport

Lat: 543705N Long: 0055221W

Major runways

Grooved asphalt: 1829m x 45m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: A320 (Fire CAT 6) A321 & B738 (Fire CAT 7) on request

Proximity to Belfast city centre (indicative travel times)

By road: 5 minutes

By public transport: 20 minutes to the Europa bus station, in central Belfast. Airport courtesy bus to the Sydenham rail halt, for connections throughout Northern Ireland and the Republic of Ireland.

Local facilities

Trains, coaches, buses, taxis and hire cars

Nearest railway station: Sydenham

Hotels: Several Hotels within 2 miles of the airport, including major international brands.

Contact

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Glasgow Prestwick

Glasgow Prestwick is Scotland's fourth largest passenger airport and Scotland's primary dedicated freighter airport. The airport welcomes around 1.2 million passengers a year, primarily flying on low cost carriers to over 25 European destinations. Glasgow Prestwick offers an efficient, hassle free and enjoyable experience to our passengers. By making the airport experience as simple, straight forward and pleasurable as possible the customer will be in the perfect frame of mind to enjoy their flight. The airport is situated 31 miles West of the City of Glasgow and benefits from easy access by motorway and rail to the cities of Glasgow and Edinburgh. The airport is the only Scottish airport with an integrated railway station offering direct services to Glasgow and beyond. Over 30% of passengers utilise the railway station – the highest proportion of any airport in the UK outside of London.

Location of airport

Lat: 553034N Long: 0043540W

Major runways

Asphalt: 2,986m and Asphalt: 1,825m (see the UK NATS Aeronautical Information Publication for details)

Operations

24/7 operations with no noise restrictions

Aircraft types/size limitations

Largest aircraft: AN225, AN124, Boeing 747, Airbus 340 or similar

Proximity to Central Glasgow (indicative travel times)

By road: 35-40 minutes

By public transport: 44 minutes to Glasgow Central Station

Local facilities

Trains, coaches, buses, taxis and hire cars

Nearest railway station: Glasgow Prestwick Airport – direct services to Glasgow Central Station and Ayr

Hotels: Several within two miles radius

Contact

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Cardiff

Cardiff Airport is the national airport and as such is proud to be a convenient gateway between the world and Wales. Cardiff handles over one million passengers a year, with over 40 direct routes and over 900 connecting flights to destinations worldwide through hubs in Amsterdam, Paris, Dublin and Barcelona.

The airport situated in the Vale of Glamorgan, is 10 miles from the M4 and 12 miles from Cardiff city centre. Public transport links are available to both Cardiff and Bridgend.

Cardiff Airport is fully licensed with Cat 1 ILS and Cat 7 fire cover (8 and 9 available on request). There are 24 hour unrestricted operations and no noise restrictions in place. Extensive hard standing is available.

Cardiff Airport is also home to British Airways Maintenance Centre.

Location of airport

Lat: 512348N Long: 0032036W

Major runways

Asphalt: 2392m x 46m (see the UK NATS Aeronautical Information Publication for details)

Aircraft types/size limitations

Largest aircraft: Boeing 747, Airbus 340 or similar (see UK AIP for airport night noise restrictions (engine run restrictions only)

Proximity to Cardiff (indicative travel times)

By road: approximately 30 minutes to Cardiff City Centre

A bus service operates from the terminal to Cardiff Central

By train: A rail link connects Rhoose Cardiff Airport Station to Cardiff Central and Bridgend. It takes approximately 30 minutes to Cardiff Central. A shuttle bus service is available for passengers which connects all trains to the airport terminal

Taxis and car hire are also available on site

Local facilities

The Express by Holiday Inn Hotel is on the airport site and several other hotels are available within 5 miles

Contact

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Further information

Department for Transport

https://www.gov.uk/government/organisations/department-for-transport

Department for Transport aviation permits

https://www.gov.uk/government/publications/aviation-permits

Airport night noise restrictions for Heathrow, Gatwick and Stansted http://www.dft.gov.uk/pgr/aviation/environmentalissues/noiselimitsforaircraftdepart2944

NATS Aeronautical Information Publication (AIP)

http://www.nats-uk.ead-

<u>it.com/public/index.php%3Foption=com_content&task=blogcategory&id=6&Itemid=13.html</u>

Airport Coordination Limited

http://www.acl-uk.org/

UK Trade & Investment

http://www.ukti.gov.uk

VisitBritain

Visitbritain.org
Visitbritain.com