

Dear Sir,

At least two of our members TAG Farnborough and Biggin Hill have had some input to the commissions initial consultation. However, I thought it might be prudent to make sure that there is sufficient awareness of business aviation as a sector. Quite often aviation is considered primarily in the context of scheduled airline operations and unfortunately business aviation is sometimes overlooked. However, in the context of airport capacity considerations I believe that this could be significant oversight.

A particular example of this would be London Luton Airport where business aviation represents 27% of the traffic and the capacity constraints are not with slots, but with ground parking space on the apron.

Rather than answering the questions provided I have chosen to provide you with high level data showing you the size of business aviation in Europe and the projected growth of that market in the attached excel spread sheet.

The first worksheet (fleet) shows aircraft hulls for the period 2012-2012. I do apologise for the decimal places the data was provided for me by my European colleagues and I cannot amend the table. The second worksheet (Projection) shows the projection for our fleet size going out to 2030.

The following table shows the proportion of the fleet across the member states. As you can see we are still one of the big three centres for business aviation in Europe and we clearly wish to see that grow in the future.

EU 27	England	Germany	France	Luxembourg	Lithuania	Italy	Austria	Poland	Slovakia
3100	530	547	389	108	5	220	268	34	17
	17,10%	17,65%	12,55%	3,48%	0,16%	7,10%	8,65%	1,10%	0,55%

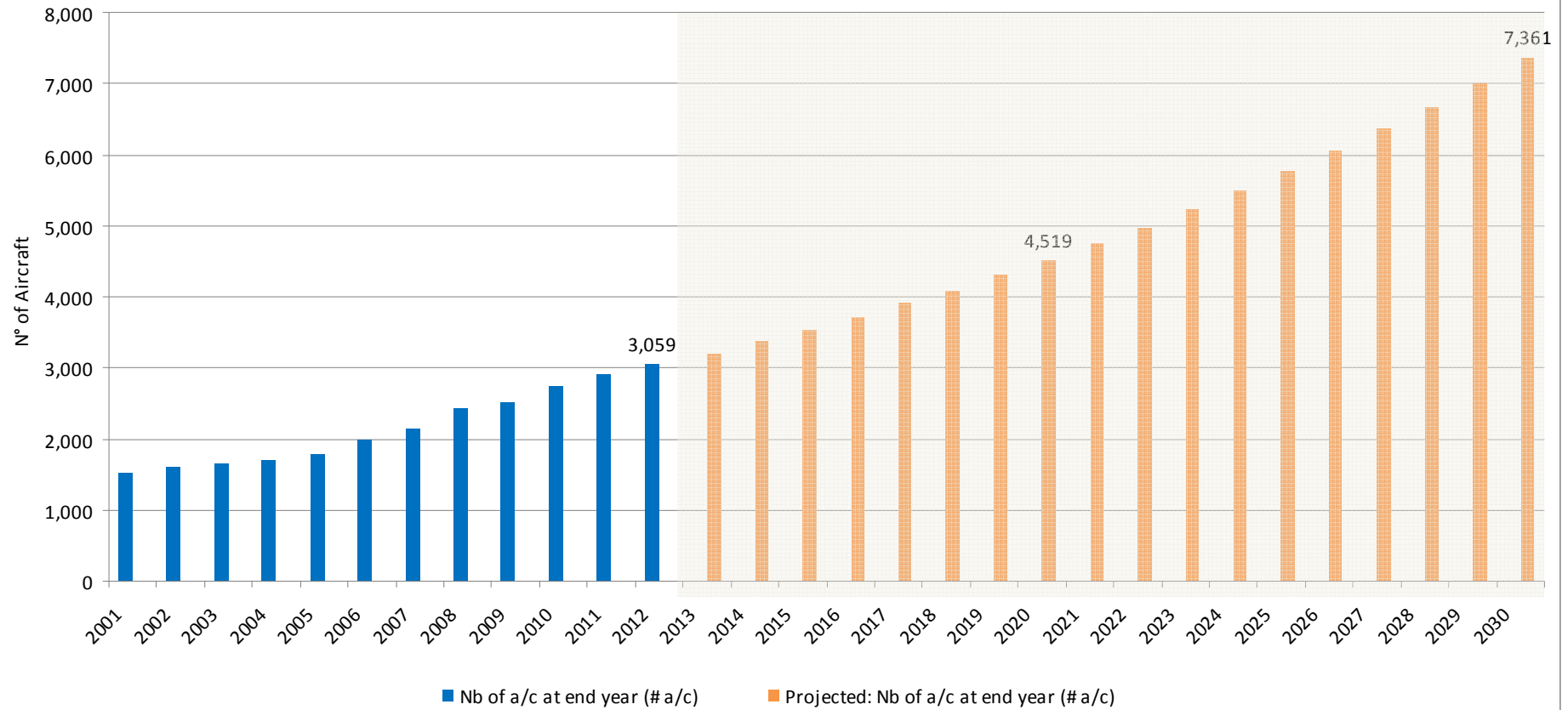
EU 27	Greece	Denmark	Latvia	Spain	Belgium	Czech Republic	Sweden	Hungary	Netherlands
3100	59	99	8	151	84	49	86	8	71
	1,90%	3,19%	0,26%	4,87%	2,71%	1,58%	2,77%	0,26%	2,29%

EU 27	Ireland	Bulgaria	Cyprus	Portugal	Slovenia	Finland	Romania	Estonia	
3100	54	24	17	168	19	45	18	11	11
	1,74%	0,77%	0,55%	5,42%	0,61%	1,45%	0,58%	0,35%	0,35%

A really good example of how things can go wrong when they are not considered in a strategic light, is currently taking place at Heathrow. Under the heading of 'Wake Vortex' the airport is proposing new requirements regarding the separation of aircraft as a consequence of the interaction between different aircraft types, following the disruption of the airflows on the flight path 'Wake Vortex'. In this case the proposal will effectively ban any remaining business aircraft from LHR. I am discussing this issue next Monday with the airport authority.

Business aviation is a market accelerator and the people who use our services are key to ensuring that the UK economy continues to grow. Our own contribution to UK GDP is not insignificant either.

## Fleet Projection



## EUROPEAN BUSINESS AVIATION FLEET EVOLUTION

