



Department
for Transport

Flightpath to the Future





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Ministerial Foreword



Grant Shapps
Secretary of State
for Transport



Robert Courts
Minister for Aviation

From its earliest beginnings a century ago, commercial aviation has been fundamental to the growth and prosperity of the UK. Today, by providing fast, direct links to hundreds of destinations worldwide, it has helped make us one of the world's best-connected and most successful trading nations, and among the ten most visited countries globally.

Prior to the pandemic, aviation was thriving, with passenger demand on the rise. Air transport directly employed nearly 150,000 people, and supported up to half a million more jobs across the UK, in aviation and aerospace.¹ But in March 2020, much of our aircraft fleet was grounded by the emerging COVID-19 virus. Whilst almost every industry was affected by the pandemic, arguably none were more severely hit than aviation and tourism. Although the UK Government provided unprecedented financial support, it was the beginning of an immensely tough two years for the sector.

Thankfully, as one of the most vaccinated nations, the UK is now well on the way to recovery. On 18 March, we became the first major economy to remove all COVID-19 travel

measures for passengers entering the UK, as part of our wider plans to live with and manage an endemic COVID-19. This will not only speed up the safe reopening of international travel, but also encourage passengers back to air travel.

Having endured the worst crisis in its history, now is the right time for UK aviation to look to the future. We will work hand-in-hand with the industry to help it grow and return to pre-pandemic levels of demand and profitability. That means supporting airport expansion where it's justified, to boost our global connectivity and level up the UK. But it also means committing to a much greener future. UK aviation can play a pioneering role in decarbonising air travel, and hence earn the right to grow.

Prior to the pandemic, we published the Aviation 2050 (2018) consultation,² a wide ranging analysis of the industry's future. Many of the issues considered in that document remain relevant today. However, much has also changed in that time. Aside from the profound challenges posed by the virus, Brexit also provides new opportunities. That is why we are publishing *Flightpath to the Future* – a strategic framework for aviation over the next ten years.

Our objective was to set out how aviation can modernise, innovate, and become even more competitive in this new environment. That process starts with learning lessons from the pandemic to help the industry recover, before assessing how it can lead on key priorities like decarbonisation, safety and security.

We don't believe aviation must decline for us to meet our climate change targets. Already, UK ingenuity is designing and developing carbon-free aircraft. Our ultimate goal is nothing less than guilt-free, zero emission flying. So we must

1 DfT analysis of ONS low level aggregates and ONS Business Register and Employment Survey

2 [Aviation 2050 – the future of UK aviation – GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/aviation-2050)

act quickly and decisively to put the industry on a green trajectory, by developing clean aircraft, sustainable fuels, and more efficient airspace and airports. Indeed, we are making great strides to turn these ambitions into reality through the Jet Zero programme, and to pioneer greener air travel internationally.

Alongside *Flightpath to the Future*, we are also creating a new body called the Aviation Council, bringing together ministers, civil servants, and representatives from across the aviation, air travel and aerospace sectors. The Minister for Aviation will jointly chair the Council alongside a senior industry figure. Our aim will be to ensure that the measures outlined in *Flightpath to the Future* are implemented and delivered. The Council will shape aviation policy, and continue the close collaboration between government and industry that has been established throughout the pandemic.

We cannot overstate the difficulties that aviation has faced over the past two years, nor the importance of its role in keeping essential air freight moving during lockdown. But we have a real chance now to build back better, and make UK aviation cleaner, greener, and more competitive than ever before. *Flightpath to the Future* explains how we can achieve these goals. A future where aviation remains of huge strategic importance to the country post-Brexit, allowing tourism, business and trade to thrive. A future where UK aviation becomes synonymous with sustainability, and part of the solution to climate change. And a future where the UK consolidates its position as one of the world's most important aviation hubs.

Executive Summary

The UK's aviation sector and supporting industries, such as aerospace, are a real asset to the UK. They deliver important value for the UK and its citizens through providing travel opportunities, supporting business, and transporting freight. Before the COVID-19 pandemic the aviation sector contributed at least £22 billion to GDP (£14 billion from the air transport sector and a further £8 billion from aerospace) each year. Air transport directly employed nearly 150,000 people, and supported up to half a million more jobs across the UK, in aviation and aerospace.³

As the sector recovers from the pandemic, we are committed to working in partnership with all aspects of aviation to support growth and drive forward a successful recovery. This will include building back better and greener to ensure the UK delivers one of the strongest, most modern and most sustainable aviation sectors in the world. We will work with the sector to ensure UK aviation retains its international standing, continuing to lead the way globally on key issues such as decarbonisation, safety and security. We also want to ensure the sector remains fit for purpose, embracing both modernisation and innovation to bring benefits to the UK and for users.

Airports have a key role to play in boosting our global connectivity and we continue to be supportive of sustainable airport growth. Our existing planning frameworks⁴ for airport growth provide a robust and balanced framework for airports that want to grow within our strict environmental criteria.

That is why the Government has developed a strategic framework for the sector, looking

ahead over the next ten years. This strategic framework focuses on providing clarity on the key priorities for the sector and how the Government and industry will work together to deliver them. It recognises that, whilst many of the issues considered through the Aviation 2050 consultation (2018) remain very relevant today, it is important that we have a clear action plan for the sector. This must take into account contextual changes, including the impact of the pandemic and the opportunities presented by our exit from the European Union (EU).

As well as taking into account the importance of recovery, this strategic framework also considers opportunities and challenges over the medium-term. It is focused on how the Government and the sector can work together to deliver success.

This strategic framework focuses on four key themes, including:

- Enhancing global impact for a sustainable recovery
- Embracing innovation for a sustainable future
- Realising benefits for the UK
- Delivering for users

These themes are underpinned by a ten point plan. The plan highlights key priority areas which will help deliver the Government's commitment to growth, as well as supporting a modern, sustainable, and innovative sector for the future. The themes and the associated ten point plan provide a framework for delivery. They identify the issues and opportunities facing the sector and provide certainty, both to industry and individuals, on how the

³ DfT analysis of ONS low level aggregates and ONS Business Register and Employment Survey

⁴ Beyond the horizon – The future of UK aviation: Making best use of existing runways (2018) and Airports National Policy Statement: new runway capacity and infrastructure at airports in the South East of England (2018) are the most up-to-date policy on planning for airport development.

Government and the sector can work together to meet these challenges head on. This includes setting out clear deliverables across all of our ten priority areas, and establishing how we will take these commitments forward. In some areas, this will include further consultation with the sector, or the publication of a specific strategy to address an opportunity or challenge.

Central to successfully **delivering the ten point plan**, and meeting our ambitions for the future of the sector, is recognising that it **must be delivered in partnership**. Whilst the pandemic has presented huge challenges for the sector, there are many positive lessons to be learned about the value of close collaboration between Government, industry, regulators, and other key partners. On that basis, alongside launching this strategic framework and ten point delivery plan, we **will also be launching a new Aviation Council**.

The Aviation Council will be **jointly chaired by the Minister for Aviation and a sector representative**, who will shortly be appointed. The Council will bring together representatives from across the whole of aviation and supporting industries, as well as key cross-Government representatives and representatives from the Devolved Administrations. The Council will support the implementation of the commitments set out in this publication. It will meet regularly to monitor progress on the delivery of the ten point plan, and provide insight to help inform policy making. Where appropriate, the Council may also establish smaller working groups to consider specific issues in more detail and report back to Council members to ensure we are collectively delivering

the right outcomes for the whole sector. There are a range of Government and sector groups already in place, such as the Jet Zero Council, and we will ensure the work of the Aviation Council complements these existing structures.

The Council will also provide an opportunity for the whole of Government, including the Department for Transport (DfT), a range of other Government departments, and the Devolved Administrations, to hear regularly from the sector. This will allow the sector to share views on key issues, and to provide insights to help deliver a competitive, innovative, and modern sector for the future. This collaborative approach presents a real opportunity for ongoing engagement and recognition that a thriving aviation sector for the future is central for the UK's success.

Another crucial aspect of delivering the ten point plan will be the pivotal role of the sector's regulator, the Civil Aviation Authority (CAA) and relevant bodies such as Air Accidents Investigation Branch (AAIB) and Air Safety Support International (ASSI). We will work closely with the CAA to deliver a regulator and regulatory framework fit for the future, particularly now we have left the EU and EU Aviation Safety Agency. We will build on the objectives and priorities set out in the CAA's strategy. This includes enabling recovery, innovation, and growth, as well as driving forward global impact and environmental performance ambitions. This is alongside supporting the CAA to deliver their core regulatory functions on safety, security, environmental considerations, economic regulation and consumer protection.

This strategic framework

This strategic framework covers the following key areas:

Enhancing global impact for a sustainable recovery

The Government is committed to growth in demand and working with industry to ensure we enable the sector to recover. We want the aviation sector to build back better, alongside supporting a greener future, and more sustainable growth. Central to this will be working closely with industry, the CAA, public health bodies, and the global aviation community. This will look to build consumer confidence and learn lessons from COVID-19, in keeping with the COVID-19 Public Inquiry. This will include the development of new systems to build resilience in the aviation sector in the event of a future pandemic, including global standards and frameworks.

We are also committed to continuing to improve global connectivity for the UK, including through refreshing the prioritisation of our work on Air Services Agreements. Enhanced global connectivity will help secure our position as one of the strongest aviation sectors in the world. It will also support our ambitions to build new markets for trade and investment. We will also ensure that, following the UK's exit from the EU, aviation plays an important role in Free Trade Agreements (FTAs). We will make sure FTAs include liberal provisions for the trade in auxiliary air transport services and for investment in aviation businesses.

Underpinning the sector's future success will also be UK aviation's global leadership, influence and impact on the international stage. The UK, as a global leader, is well positioned to set the agenda on a range of key global issues. There are huge opportunities in the years to come to influence global direction on a number of key areas. This includes priorities such as

decarbonisation, safety and security. This will include delivering on our mission to see aviation emissions reduced, not just in the UK but also globally. The Government is negotiating in the International Civil Aviation Organization (ICAO) to agree a long-term emissions reduction goal for international aviation by its 41st Assembly in 2022. We will continue to lead the way in supporting a more sustainable future for both UK and global aviation.

In addition, it is important we ensure airport capacity supports the UK's objectives. Following our exit from the EU, we have the opportunity to consider whether we could improve the way in which our airport slots framework operates. We will review the existing slot allocation system in the UK to consider whether it could be updated to better support our policy objectives. This includes delivering better outcomes for passengers, such as contributing to lower fares, more destinations and more service innovation by airlines. We also want to allow citizens to benefit when additional new capacity is created by airport expansion. A fair, transparent, and competitive system, that supports global connectivity, will ultimately deliver the best outcomes for the industry and consumers, and we will be consulting on options for reform.

Embracing innovation for a sustainable future

The future of aviation rests on embracing new opportunities, including the critical challenge of delivering Jet Zero – aviation's contribution to the UK's net zero target by 2050. Putting the sector on course to achieve Jet Zero, which will be set out in the forthcoming Jet Zero Strategy, requires an extensive transformation of the sector over the coming decade. It will require close collaboration between the Government and industry, including through the Jet Zero Council. We will also continue to work with the sector to reduce the localised impacts of aviation from noise and air pollution.

Achieving Jet Zero necessitates action across a series of measures:

- increasing the efficiency of the existing aviation system – our aircraft, airports and airspace;
- accelerating the take up of sustainable aviation fuels (SAF);
- developing and deploying the first generation of zero emission aircraft;
- ensuring we have the markets in place to properly price carbon emissions and offset any residual emissions with greenhouse gas removals;
- and supporting consumers to be able to make the greenest choices over routes and aircraft when they choose to fly.

Enabling the introduction of new types of aircraft is also key. Aircraft such as drones and electric vertical take-off and landing aircraft present a wealth of opportunities for low carbon local and regional air mobility for goods and people. We will work with industry to drive sustainable technological transformation through regulation and a systems approach to provide new and improved services for users. The CAA also has a critical role to play in supporting delivery through its regulatory activities and working closely with innovators such as through its Innovation Hub. The Department for Transport (DfT) is providing additional funding to the CAA to scale up support for new aviation technology.

Airspace modernisation will be critical to both these ambitions. It will help UK aviation to meet decarbonisation targets, as well as ensuring new and current airspace users can safely and effectively operate in UK airspace. We recently announced that £3.7 million would be made available on an exceptional basis, while the sector recovers from the impacts of the pandemic, to support airports in reducing

journey times, pollution, and flight delays. The new funding, on top of £5.5 million in Government investment announced last year, will drive forward progress in redesigning the UK's 'motorways in the sky'. This will deliver direct benefits to passengers, airports, airlines, and the communities surrounding them.

Realising benefits for the UK

Aviation also has a central role in delivering local benefits across the UK. This includes championing the levelling up agenda, strengthening union connectivity, boosting economic success, and supporting local jobs. It is important to recognise the role our extensive airport, airfield and aviation infrastructure network plays in providing benefits to local communities, as well as supporting associated supply chains and the aerospace industry.

The Government is committed to exploring how aviation can further support ambitions to boost union connectivity. We support routes that are in danger of being lost through our Public Service Obligation (PSO) policy for domestic aviation. Where journeys are too long to be reasonably taken by road or rail, our PSO policy can provide support. As part of the independent Union Connectivity Review there were recommendations on PSO policy which will be carefully considered as part of the Government's response.

Airport expansion has a key role to play in realising benefits for the UK through boosting our global connectivity and levelling up. We continue to be supportive of airport growth where it is justified, and our existing policy frameworks for airport planning provide a robust and balanced framework for airports to grow sustainably within our strict environmental criteria.⁵ They continue to have full effect, as a material consideration in decision-taking on

5 Beyond the horizon – The future of UK aviation: Making best use of existing runways (2018) and Airports National Policy Statement: new runway capacity and infrastructure at airports in the South East of England (2018) are the most up-to-date policy on planning for airport development.

applications for planning permission. The Government is clear that the expansion of any airport must meet its climate change obligations to be able to proceed.

Ensuring the sector has the right skills, and is diverse and inclusive, will also play a vital role in supporting essential jobs throughout the UK. A key aspect of this is the delivery of the Government's *Reach for the Sky* programme, which partners with the sector to raise the profile of the aviation sector and create new and improved career pathways. This is also supported through our recent recruitment of twelve Aviation Ambassadors, who will act as role models and champions for the sector.

In addition, implementing our General Aviation Roadmap⁶ will further underpin aviation's local impact. General Aviation, and businesses within General Aviation, act as a lynchpin for the sector and wider economy in providing domestic and international connectivity, as well as supporting innovation, decarbonisation, and skills.

Delivering for users

Consumers are at the heart of UK aviation, and have faced significant restrictions throughout the pandemic. As we seek to work with the sector to recover passenger demand, supporting consumer confidence, and ensuring consumers have all the protections they need, has never been more important. Our recently published consultation on aviation consumer rights⁷ considers whether the consumer enforcement framework is adequate, and whether greater protections for consumers may be required. The consumer experience also needs to be accessible and enjoyable for all, and we will work with industry to consider ways to improve air travel inclusivity and accessibility. We will also work with industry and the CAA to ensure consumers fully understand their rights and

responsibilities, to further support improving consumer confidence and the return of passenger demand.

Making sure everyone involved in aviation feels safe and secure at all times is also paramount, as well as exploring ways to deliver an experience at the border that is as smooth as possible. Maintaining world-leading safety standards will always be essential. As the sector evolves, the Government will continue to work alongside industry and regulators to ensure safety standards evolve to meet the needs of the sector and its users. Protecting the UK is also critical for aviation, with the UK continuing to lead internationally on security standards, and always staying ahead of the threat remains a top priority.

Alongside this, it is important we work with the CAA and other regulatory agencies to ensure they have the resources, skills and capabilities needed to adapt to the changing needs of the sector. This will allow them to work effectively with industry to ensure aviation continues to deliver for users.

6 [General Aviation Roadmap – GOV.UK \(www.gov.uk\)](https://www.gov.uk)

7 [Reforming aviation consumer policy: protecting air passenger rights – GOV.UK \(www.gov.uk\)](https://www.gov.uk)

Ten point plan for the future of UK aviation

Enhancing global impact for a sustainable recovery

1. **Recover, learn lessons from the pandemic and sustainably grow the sector** – commit to growth and work together with industry and the CAA towards a future where the sector can recover, grow and thrive in a way that is sustainable, resilient and connected. We will work with international partners and the COVID-19 Public Inquiry to learn lessons from the pandemic and build the resilience of the sector, as well as informing broader future pandemic preparedness. We will also enhance global connectivity and trade through the prioritisation of our work on **Air Services Agreements**, and ensuring new FTAs include liberal provisions for the trade in auxiliary air transport services and for investment in aviation businesses. We will retain our position as one of the strongest aviation and aerospace sectors in the world, whilst also delivering a greener and cleaner sector. We will also **establish a new Aviation Council to work with the sector and across Government to discuss and deliver these ten priorities.**
2. **Enhance the UK's global aviation impact and leadership** – allowing the UK to set the agenda on key international aviation issues for the future, including the global reopening of international travel, decarbonisation, safety and security. This will be delivered by **widening our existing relationships and influence**, through multilateral organisations, such as ICAO, the European Civil Aviation Conference (ECAC) and EUROCONTROL. Bilateral relationships with our key partners, and building on the globally leading role and reputation of our key aviation agencies, will also be key. We will use our influence and reputation to push for greater environmental ambition by ICAO through the **agreement of a long-term emissions reduction goal for international aviation in 2022.**
3. **Support growth in airport capacity where it is justified, ensuring that capacity is used in a way that delivers for the UK** – airport expansion has a key role to play in enhancing the UK's global connectivity and we remain supportive of sustainable airport growth. We will also support the sector to drive forward continued quality improvements, so **slot capacity is used effectively** and delivers the best possible results for the UK. An important aspect of this will be carrying out a detailed review of the airport slot allocation system to look at how we can improve it. This will ensure that the system meets the needs of the UK now that we have left the European Union, and we will consult on this shortly.

Embracing innovation for a sustainable future

4. **Put the sector on course to achieve Jet Zero by 2050** – as set out in the Jet Zero Consultation, this will include delivering on our aspiration for zero emission flights across the UK this decade. We will also seek to deliver our ambition for **10% SAF to be blended into the UK fuel mix by 2030, supported by £180 million of new funding in 2022-2025 and a SAF mandate under development**. This will require extensive collaboration between Government and industry, including through the Jet Zero Council. We will also continue to work with the sector to reduce the localised impacts of aviation from noise and air pollution.
5. **Capture the potential of new technology and its uses** – benefitting from new regulatory freedoms outside the EU, we will be one of the first countries in the world to routinely use new aircraft to provide new and improved low carbon services, and local and regional air mobility for goods and people. This will include aircraft such as drones and electrical vertical take-off and landing aircraft. This will be achieved through providing additional funding to CAA to scale up support to innovators and **setting up a Future of Flight Industry Group** to work with industry and the CAA **to develop, publish and implement a plan for Future of Flight**. The plan will include delivery of the necessary regulatory framework for aviation innovation to thrive. We will also support the sector in delivering the **Airspace Modernisation Strategy to achieve quicker, quieter, and cleaner flights**. The strategy will also ensure that all new and current airspace users can operate and coexist safely in UK airspace.

Realising benefits for the UK

6. **Unlock local benefits and level up** – recognise how our extensive airport, airfield and aviation infrastructure network acts as a catalyst for national and local benefits. This includes through trade, air freight, aerospace, investment and tourism, as well as allowing people to benefit from improved connections across the union and regions. We are bolstering air connectivity within the union through a 50% cut in domestic Air Passenger Duty (APD), while further aligning APD with UK environmental objectives by adding a new ultra-long-haul distance band. **We will also support routes** that are in danger of being lost, through our Public Service Obligation policy for domestic aviation. Where journeys are too long to be reasonably taken by road or rail, our PSO policy can provide support. As part of the independent Union Connectivity Review there were recommendations on PSO policy which will be carefully considered as part of the Government's response. Airport expansion also has a key role to play in unlocking benefits to the UK and levelling up. Our existing policy frameworks on airport planning provide a robust and balanced framework for sustainable growth, and continue to have full effect.
7. **Unleash the potential of the next generation of aviation professionals** – enhance skills and diversity across the entirety of the sector. This includes **maximising the impact of the Aviation Skills Retention Platform and Talentview Aviation** to support the sector's skills and workers as it recovers. The Government will also support the development of STEM skills within aviation and aerospace, as well as driving ambitious delivery of our *Reach for the Sky* programme. The **twelve Aviation Ambassadors** will also play an important role in supporting and improving diversity, inclusion and accessibility in aviation careers and related jobs. The Government will also work in partnership with the CAA and the sector to better understand and plan for the future skills needs of aviation across the UK.

- 8. Make the UK the best place in the world for General Aviation** – recognise the important role General Aviation plays in providing domestic and international connectivity for a range of areas. This includes business, sport and leisure, training and emergency services. It also supports businesses and aviation services, including maintenance and manufacturing firms. We also recognise the important role General Aviation, and businesses within General Aviation, play in supporting innovation, decarbonisation and skills. We will continue to work in partnership with the CAA and the sector to **implement our ambitious General Aviation Roadmap**. In addition, we will ensure we seize opportunities from leaving the EU, including making further changes to improve the regulatory environment.

Delivering for users

- 9. Improve the consumer experience** – build consumer confidence, make aviation accessible and inclusive for all, and facilitate a smooth border experience. We will work with industry and the CAA to **offer greater consumer protections and improve accessibility** through modernising our approach. This will include building on opportunities to improve consumer protection on domestic flights following our exit from the EU. We will also communicate better with consumers than ever before through **publishing an Aviation Passenger Charter**.
- 10. Retain our world-leading record on security and safety with a world-leading regulator** – leaving the EU has given us increased autonomy to develop a safety regulatory framework that meets both the needs of the UK and global standards. We will continue to work closely with the CAA to ensure safety standards are clear but flexible, and continue to be seen as the best in the world. We will also ensure we are regularly modernising and adapting to meet the needs of the sector and consumers, now and in the future. As part of this, we will work closely with ICAO following the Universal Security Audit Programme, and ahead of the Universal Safety Oversight Audit Programme, to ensure the UK is seen at the global forefront of regulatory standards and practices. We are also **refreshing the UK Aviation Security Strategy** to ensure our security activity stays ahead of the threats to aviation and continues to meet the needs of an evolving aviation sector, including promoting the most effective security standards globally.

Responding to the pandemic

Prior to the pandemic the UK had a successful, world-leading aviation sector, supporting thousands of jobs across the country. The last two years have presented immense challenges for global aviation, and the international travel restrictions that Governments across the world have had to impose to protect public health have significantly curtailed passenger demand and growth. Despite the challenges presented, aviation has played a critical role in supporting the pandemic response. This has included adapting quickly to protect public health, delivering vital personal protective equipment (PPE) throughout the crisis, and helping to maintain our international and lifeline distribution networks.

A safe return to international travel

In February 2021, as part of the Prime Minister's roadmap out of lockdown, the Secretary of State for Transport reconvened the Global Travel Taskforce (GTT). The Taskforce was focused on delivering a safe return to travel through collaboration between the Government and the sector. The GTT report⁸ was published in April 2021 and established the traffic light system to facilitate international travel in the safest way possible.

Alongside this, the Government also engaged extensively internationally, at both a multilateral and bilateral level, to move towards global standards to facilitate reopening. The Government also focused on further developing key relationships to support reduced restrictions for UK travellers and the reopening of essential routes.

It became increasingly apparent throughout 2021 that vaccines would be the best route out of restrictions. The GTT's three checkpoint reviews took account of scientific evidence and allowed greater opening of international travel by allowing people to demonstrate their vaccination status. The success of the UK vaccination programme, alongside the impact of close collaboration between the Government, the sector and international partners, has facilitated the reopening of international travel, including key routes such as the United States.

Most recently, the UK became the first major economy in the world to remove all COVID-19 related travel measures and restrictions for all passengers entering the UK. Since 18 March, passengers have no longer needed to complete a Passenger Locator Form, show proof of their vaccination status, or take any tests upon arrival. This is a really important milestone and marks a turning point for aviation in our journey back to pre-pandemic normality.

However, the emergence of further harmful COVID-19 variants cannot be ruled out. Therefore, the Government will maintain a range of contingency measures in reserve to enable us to take swift and proportionate action to delay their ingress into the UK. The Government's default approach will be to use the least stringent measures, such as public health guidance rather than mandatory measures, to minimise the impact on travel as far as possible. Given the high personal, economic and international costs border measures can have, contingency measures will only be implemented in extreme circumstances and only where necessary to protect public health.

8 [Global Travel Taskforce: safe return of international travel - GOV.UK \(www.gov.uk\)](https://www.gov.uk/global-travel-taskforce-safe-return-of-international-travel)

Support for aviation and passengers

In addition to our work to facilitate the safe reopening of international travel, the Government has taken a range of steps to support the sector and passengers throughout the pandemic.

The CAA has played a crucial role in supporting the sector. This has included the repatriation of passengers following airline insolvencies, more flexible means of payment for smaller regulated businesses, and regulatory exemptions and flexibilities where safe and necessary to ease burdens on the sector. The CAA also kept their regulatory charges at Financial Year 2019-20 levels for two years, with the CAA absorbing the cost of inflation.

During this period, we estimate that the air transport sector will have benefited from around £8 billion of Government support. This support has included delivering important aviation specific schemes, such as multiple rounds of the Airports and Ground Operators Support Scheme (AGOSS), additional funding for airspace modernisation, as well as economy wide income support schemes and support for businesses through grants and loan guarantees.

In addition, in summer 2020, the UK urged the European Commission to waive slot usage rules and allow airlines greater flexibility, recognising the impact of COVID-19 on passenger demand. The decision was taken to remove the requirement for airlines to operate 80% of their flights just to hold onto the slots, avoiding the need for many thousands of highly inefficient, empty aircraft to continue flying.

After the transition period ended, full alleviation from the slot rules was maintained for the summer 2021 season. We then took advantage of the UK's exit from the EU to introduce new powers, in the Air Traffic Management and Unmanned Aircraft Act 2021, to allow more flexible alleviation measures to help the sector during the pandemic.



Figure 1: Passengers at an airport boarding gate.

Passenger COVID-19 Charter

The charter covers:

-  **Your rights if your trip is cancelled or changed**
-  **How you can travel safely internationally**
-  **What you need to do if you require extra assistance while travelling**
-  **How to keep informed at all stages of travel**
-  **Information on how your personal data is used**

We worked closely with the aviation industry to understand the pressures and challenges for different airlines and airports and how different kinds of measures might affect them. This has led to bespoke alleviation measures being implemented for the winter 2021 and summer 2022 seasons.

We also acted quickly to protect consumers, including the UK Government’s underwriting of the Air Travel Trust Fund to ensure that consumer rights remained protected. We also launched the Passenger COVID-19 Charter⁹ with industry to ensure passengers remained well informed about travel requirements.

The Charter set out consumer rights, responsibilities, and reasonable expectations for consumers, with a focus on helping to re-build consumer confidence as international travel reopened.

The Government has also recognised the impact of the pandemic on the aviation workforce, and the implications of this for the sector as a whole. We have supported workers through launching the Aviation Skills Retention Platform to support skills retention within the industry.

Looking ahead

Taking into account recent developments, including the removal of all COVID-19 related travel rules for all arrivals to the UK, now is the right time to start looking ahead to the future of the sector, and to provide certainty on the Government’s plans to drive growth into the medium term.

We will draw on experience of the pandemic to better prepare for future pandemics, including banking the investment we have made in areas such as digitising the passenger experience at the border, to deliver more effective systems in the future.

The Government will also work with international partners and through the COVID-19 Public Inquiry to learn the lessons from COVID-19, build the resilience of the sector, and inform broader future pandemic preparedness.

Learning lessons from the pandemic and building resilience

As the sector recovers, it is essential we think about what lessons can be learned from the pandemic. This is important both for ensuring a return to increased passenger demand and

9 [Passenger COVID-19 charter – GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/passenger-covid-19-charter)

growth in the sector, as well as for preparedness to minimise disruption for future potential contingencies.

We will achieve this by working with international partners and through the COVID-19 Public Inquiry. This will identify lessons learned in responding to future pandemics and the Government will consider fully all recommendations that emerge from the Public Inquiry. Internationally, the Government will use the UK's influential voice to ensure that we remain at the forefront of discussions on future action and that best practice is shared with our international partners. We will deliver on this commitment through engaging proactively. This will be at both a multilateral level, including at the upcoming ICAO Assembly, and through other fora, as well bilaterally, to ensure that the learning is used effectively to support the sector to prepare for future contingencies.

We will also deliver these commitments across four key areas:

Cooperation – At the heart of managing the pandemic has been the importance of Government and sector collaboration. The Government recognises the essential role the sector has played in facilitating the reopening of international travel, and continually adapting as COVID-19 has presented new challenges throughout the pandemic. Many initiatives, such as certification at the border, would not be possible without the continued support and hard work of aviation staff across the world. As we look ahead it is vital that we learn from the Government and sector engagement during the pandemic, and seek to develop further our collaborative approach. The launch of an Aviation Council, jointly chaired by the Minister for Aviation and a sector representative, will be an important part of achieving this. **We commit to working closely with the Aviation Council to support our understanding of lessons learned from the pandemic and**

development of next steps to support future resilience and preparedness.

International engagement – A crucial aspect of responding to the pandemic has been utilising and building relationships with international partners. The pandemic is a global issue, which ultimately has required global responses and solutions. The UK's influential position within ICAO, and other multilateral organisations, including the principles agreed as part of the UK's G7 presidency, has been essential for driving international progress. For example, at the ICAO High Level Conference on COVID-19, the UK played a critical role in agreeing a collective way forward. This included a Ministerial Declaration, that supported travel restart and the need to build a sustainable, resilient future for the sector. The UK's positive bilateral relationships with key partners have also been instrumental in facilitating key reopening progress, such as the reopening of the UK-US routes. As we look ahead, it is essential we **continue to build on these relationships and maintain our central role within key multilateral organisations. This will allow us to further influence progress on key issues, such as the continued development of global standards.** Our position internationally, and the relationships we have fostered, will also play a central role in our ability to drive the agenda on other challenges facing global aviation.

Innovation – The innovative way in which airports and carriers have adapted to manage the pandemic has played a huge role in successfully facilitating international travel. Supporting the flow of travellers through terminals in the context of enhanced restrictions has presented a range of challenges. The use of digital systems to allow vaccine and testing checks to take place at the border have helped to reunite families and friends around the world. **The Government will continue to work closely with the sector to ensure that any future travel system designed to manage**

COVID-19, or any future pandemics, is as efficient as possible and minimises the burden on users and the sector.

Protecting consumers – The pandemic has had a big impact on the consumer experience and consumer confidence. We can learn important lessons from this to help shape the future offer to consumers and rebuild their confidence in air travel. The Government is therefore **consulting on possible ways to improve consumer rights, as well as exploring further communication options to ensure clarity for everyone who travels.**

Delivering our commitments

Ensuring that we learn lessons from the pandemic now will help the sector build back better and ensure it is stronger when facing the challenges of the future. We will deliver this by:

- **Engaging closely with the aviation sector**, including through the new Aviation Council, to support our understanding of lessons learned from the pandemic and development of next steps to support future resilience and preparedness.
- **Maintaining a range of contingency measures in reserve**, which would enable the Government to take swift and proportionate actions in extreme circumstances to delay any future harmful variants of COVID-19 entering the UK, should the need arise.
- **Working closely with international partners** to ensure that lessons learned from the pandemic are shared and utilised in the development of harmonised systems and measures for future contingencies. This will include engaging proactively on a bilateral basis with priority states, and through multilateral fora, including at the upcoming ICAO Assembly.



Figure 2: Secretary of State for Transport, Grant Shapps agrees high-level principles with G7 leaders to support international and transatlantic travel, DFT.

Enhancing global impact for a sustainable recovery



In the context of the full reopening of international travel, and the sector starting to embark upon recovery, now is the right time to look ahead to the future. It is important that Government and industry work together to support a return of and growth in passenger demand, whilst equally rebuilding in a sustainable way that allows us to meet our decarbonisation goals. This approach will help ensure that the UK retains one of the strongest aviation sectors in the world.

A central aspect of achieving our future ambitions will be to continue to enhance our global aviation impact. At the heart of aviation is facilitating travel internationally to connect people, goods, and businesses across the globe. The UK will promote and improve its global connectivity to facilitate sustainable growth, as well as embracing UK aviation strengths and competitive advantage to deliver our ambitions to incentivise UK trade and investment opportunities. This will support the Government's 'Race to a Trillion' refreshed

export strategy, with the goal to deliver £1 trillion in exports annually by the mid-2030s.

Through our international work, including through ICAO and ECAC, we will enhance the UK's influence and reputation as a global leader in aviation to deliver on our priorities. This includes playing a key role in the reopening of international travel, decarbonisation, safety, and security. These goals will be achieved through effective strategic relationships with international partners, and an ability to work collectively to deliver global ambitions.

It is also essential that we utilise existing airport capacity in a way that delivers for the UK, putting the needs of users first and supporting our aims to enhance global connectivity. A competitive, modern, and efficient sector for the future, that makes the best use of capacity, will be delivered through recognising where changes may be needed and taking steps to address this. This will include consulting on possible reforms to the slot allocation system.



Figure 3: Aircraft flying over a departures sign.

1. Recover and sustainably grow the sector

As we take forward lessons learned from the pandemic, and the sector's recovery starts to embed, it is important that we have a clear vision for the future of the sector.

The Government is committed to growth. We will work closely with industry to continually assess how we can best support sustainable recovery and a bright future for UK aviation. We want the sector to have full confidence in our commitment to supporting aviation in the UK, and our recognition of its role as a key UK strategic asset. We recognise collaboration needs to be at the heart of this and the new Aviation Council will have an important role in this. The Council will be jointly chaired by the Minister for Aviation and a sector representative, and will bring together key stakeholders from across aviation, as well as representatives from a wide range of Government departments. The Council will help monitor and support the delivery of the ten point plan. It will enable open and collaborative working between the Government and the sector as *Flightpath to the Future* is implemented.

Promoting and improving international connectivity

One of the most important contributors to achieving our recovery and sustainable growth ambitions will be our role and position internationally. This includes our global connectivity, and ability to influence the approach to global issues for aviation.

Our exit from the EU also provides a unique opportunity for the UK to capitalise on its new position as a fully sovereign, trading nation. We will take all necessary steps to embrace our

commitment to enhance the UK's international connectivity, global impact and trade and investment opportunities.

Enhancing our global connectivity, including both making the UK more accessible to visitors, and making the rest of the world more accessible for people living in the UK, is essential for the future success of the sector. The pandemic has demonstrated more than ever the importance of human connection, and the Government is committed to working with the sector to ensure UK aviation delivers the best possible global connectivity.

This includes supporting the UK's essential inbound visitor economy, which has huge economic and local benefits throughout the UK. In 2019, 41 million visitors came to the UK, spending £28.4 billion.¹⁰ The UK was the tenth most visited country in the world, and fifth for inbound visitor spending.¹¹ Travel is also the UK's third largest service export.¹² As the UK recovers following the pandemic, it is essential that the Government supports the rejuvenation of this market, and the delivery of the Tourism Recovery Plan will play an important role. UK global connectivity also supports the success of many other thriving sectors, including by enabling organisations to attract the best talent from around the world. This in turn allows us to benefit from a diverse range of skills, ideas and knowledge, and it is essential that the UK remains an attractive and accessible place for global companies to operate.

Global connectivity also unlocks international trade and associated economic growth. The UK already has a world class portfolio of Air Services Agreements (ASAs), which help to facilitate international connectivity with the rest of

10 [ONS International Passenger Survey – Estimates of overseas residents' visits and spending in the UK](#)

11 [UN World Tourism Organization – World tourism barometer and statistical annex, December 2020](#)

12 [ONS – UK trade in services by partner country: July to September 2019](#)

the world. These ASAs are treaties establishing a framework under which airlines are granted rights to fly between the UK and other countries. They have been developed through working with partner states over many years. As part of the Government's vision for future growth, **we are refreshing the prioritisation of our work in this area, continuing to build and optimise the UK's air services relationships worldwide.** This work will play an important role in supporting our ambitions to boost global connectivity and deliver the market access, flexibility, opportunity, and agility required in a very rapidly-changing international aviation sector.

Airport expansion has a key role to play in boosting our global connectivity. We remain supportive of sustainable airport growth, and our existing planning frameworks provide a robust and balanced framework for airports to grow within our strict environmental criteria. They continue to have full effect, as a material consideration in decision-taking on applications for planning permission. The Government is

clear that the expansion of any airport must meet its climate change obligations to be able to proceed.

Incentivising trade and investment

As the sector recovers, it is also important to recognise the vast opportunities available to the UK through trade and investment. Aviation continues to play a key role in supporting the Government's economic growth agenda. As we build back better, we will make the most of UK aviation strengths, leadership and competitive advantage to support the Government's ambition to incentivise UK trade and investment opportunities as set out in the Government's 'Race for a Trillion' refreshed export strategy. This includes aviation supporting the Government's ambition to achieve £1 trillion in exports annually by the mid-2030s. Aviation can help boost UK trade opportunities in a number of ways:



Figure 4: Passengers travelling through a terminal, London Luton Airport.

New Free Trade Agreements (FTAs)

Following the UK's exit from the EU the UK has an opportunity, as a sovereign trading nation, to build a portfolio of FTAs that benefit the UK and its citizens. For aviation, we will continue to work closely with the Department for International Trade's (DIT) programme of FTA negotiations to ensure new FTAs include liberal provisions for the trade in auxiliary air transport services and for investment in aviation businesses. This will enable UK business to maintain unfettered access to markets in partner countries and provide investment opportunities in both directions.

Improving market access through Air Services Agreements (ASAs)

In addition to ASAs' role in enhancing global connectivity, they are also essential for facilitating and improving market access. International air transport supports business to business links that facilitate international trade. By continuing to update and improve the UK's already extensive portfolio of ASAs, we will enable international connectivity, choice, and value for money for business travellers, as well as those travelling for personal reasons. We will also continue to break down market access barriers in the air cargo sector, giving operators commercial and operational flexibility.

Improving the UK's freight market – Air freight is an excellent example of how aviation is key for the UK in supporting our global ambitions. It played a critical role during the pandemic, delivering vital PPE throughout the crisis and helping to maintain our international and lifeline distribution networks. Building on this success, the air freight sector continues to be a key enabler of international trade, playing an integral part of the future success of the UK economy. The forthcoming publication of a cross-modal Future of Freight Strategy will further explore and highlight the crucial role aviation can play in delivering the UK's freight ambitions.

Regulation as an enabler to innovation –

The Government will continue to support global trade in aerospace products and aviation services by cooperating with a range of international partners on the development of aviation safety regulation. We will also continue to build upon the UK's existing bilateral aviation safety agreements and technical working arrangements with other countries to reduce barriers to trade. This will allow us to increase the UK's competitiveness in global markets, in a way that is consistent with the UK's status as an independent nation. In cooperation with the CAA and industry, we will embrace new technologies and demonstrate leadership in innovation, providing opportunities for UK industry domestically and internationally.

Create new technology markets – Working with industry, the Government will position the UK at the forefront of aviation innovation, including zero emission aviation. This will be achieved by supporting the development of sustainable aviation fuels, electric and hydrogen aircraft. Through the development of these technologies we will deliver world-leading regulations and infrastructure to enable new services in aviation. This will allow the UK to become a leading market for technology and fuels which can contribute to delivering Jet Zero and high value exports.

Supporting business aviation – Business aviation has an important role to play in supporting our recovery and global connectivity ambitions. It helps forge strategic links with established and developing markets, delivers vital connectivity to enable trade and investment, and enhances the UK's global influence and competitiveness. As business aviation recovers following the pandemic, we are committed to continuing to work closely with this important sector to understand how and where the Government can support business aviation to thrive and seize future opportunities.

Sustainable growth

Central to *Flightpath to the Future* is recognising the importance of clarity for the sector on the Government's ambitions, both for recovery and beyond. At the heart of our future ambitions is a commitment to rebuilding the sector in a sustainable way. We want to get the balance right between championing a return of passenger demand, whilst also recognising our sustainability goals, and the fact that the sector must adapt as we rebuild to ensure a cleaner, greener future.

The Jet Zero Strategy, which we aim to publish later this year, will set out the Government's plan for the sector to reach net zero aviation – or Jet Zero – by 2050. This follows a recent consultation on our vision for Jet Zero, focused on the rapid development of technologies to ensure that air travel remains very much part of the UK's economic future.



Figure 5: Aircraft and cargo at airport, CAA.

2. Enhance the UK's global aviation impact and leadership

Closely linked to our work on enhancing global connectivity and trade, are our international relationships, and role as an international influencer on important global issues for aviation. The UK is playing a leading role across a wide range of areas, including decarbonisation, the reopening of international travel, safety and security. An essential aspect of this is our role and influence through key international fora, such as ICAO, ECAC EUROCONTROL, the G7 and G20. Our influence in managing international relationships, at bilateral and multilateral levels, as well as engagement through key international fora, put the UK at the centre of driving forward positive action.

Reopening international travel – ICAO has played a critical role in supporting global engagement on COVID-19 and international travel. The safe and resilient restart of international travel requires global cooperation and solutions and we continue to work through ICAO to facilitate this. As a key contributor to the ICAO Council's Aviation Recovery Task Force (CART), we have helped to steer the work to develop recommendations and guidelines on international aviation restart. At the recent ICAO High Level Conference on COVID-19 recovery, the UK pushed strongly for the harmonisation of global travel rules. This is evidenced by the Ministerial Declaration and Voluntary Charter, both of which are supported by the UK. As we look ahead, and seek to learn global lessons



Figure 6: Minister for Aviation, Robert Courts, with the flight crew of first transatlantic flight since the pandemic, Heathrow Airport.

from the pandemic, we can use this opportunity to help shape the long-term role of travel risk mitigation measures that can co-exist with endemic COVID-19. For example, simplifying systems at the border and reducing testing and self-isolation requirements for all passengers. Furthermore, we can influence and agree measures for future pandemic resilience, including promoting the use of successful elements of the UK's approach.

Decarbonisation – As we consider the future of aviation, and our commitment to a sustainable global sector, some of our most important global influencing work relates to meeting global decarbonisation ambitions. The UK has already played a prominent role in driving this work forward, including using our global influence in the **establishment of the Carbon Offsetting and Reduction Scheme for International Aviation (CORSA)**.

CORSA will play a significant role by offsetting carbon emissions above 2019 levels. The Government is also negotiating in ICAO to **agree a long-term emissions reduction goal for international aviation at its 41st Assembly in September 2022**. We believe this is paramount to enabling effective decarbonisation of the international aviation sector.

Closely linked to this work, at COP26, a new **International Aviation Climate Ambition Declaration** was committed to by 25 states, representing around half of global emissions, to show support for ICAO adopting a goal that is aligned with the Paris Agreement and limiting global warming to 1.5°C.

The UK is also leading the way on developing sustainable available fuels (SAF) to tackle carbon emissions within aviation. With support

UK Aviation and International Institutions



from the World Economic Forum, we have convened a small group of states to support the **Mission Possible Platform's Clean Skies for Tomorrow coalition**. The coalition has advised on the development of a SAF 'policy toolkit' which was launched on Transport Day at COP26. The toolkit aims to support the acceleration of SAF internationally and contains practical advice for navigating the challenges for SAF uptake and supporting SAF markets. All our international work on decarbonisation is complemented by our work on Jet Zero at home.

Safety and security – The UK is a world-leader on safety standards and security. The Government, alongside the CAA, will continue to use this reputation and influence to ensure aviation all around the world is as safe and secure as possible. This will include actively supporting **ICAO's Global Aviation Safety Plan** and the **Global Air Navigation Plan** in promoting continuous safety improvements, as well as influencing the global agenda to facilitate the success of new and emerging technologies. On security, the UK will also continue to support the effective implementation of the **Global Aviation Security Plan (GASeP)**.

At the heart of meeting our international ambitions on these key areas will be our effectiveness at building and maintaining relationships and influence, at bilateral and multilateral levels.

In the context of ICAO, we will continue to use the UK's influence to advocate and institute the reforms needed to ensure ICAO functions effectively as a multilateral organisation. This includes **ensuring the UK retains its leadership role on the ICAO Council** and continues to provide expert resources to ICAO's technical working groups.

The UK also immensely values its leadership role within groups such as the G7, G20 and Five Eyes. We will continue to work with our international partners to share information and develop common approaches to the regulation of aviation, particularly where there are new and emerging technologies. **Later this year, the UK will also assume the presidency of the International Transport Forum (ITF)**. We will use our Presidency to drive forward multilateral work on the sector's future resilience and sustainable recovery.

As we look ahead to the future challenges for aviation, multilateral and bilateral partnerships will be increasingly important in furthering UK interests, and we will also continue to build on our strong bilateral relationships with key global partners. These relationships have played a pivotal role during the pandemic and have resulted in facilitating the reopening of essential routes, allowing people around the world to reconnect. Going forward, we will also continue to utilise these relationships to clearly articulate the high impact and high value investment opportunities available in the UK and from UK businesses.

3. Support growth in airport capacity where it is justified, ensuring that capacity is used in a way that delivers for the UK

Airports are part of the UK’s thriving and competitive aviation sector and play a critical role in boosting both global and domestic connectivity and levelling up in the UK. Airport expansion also plays a key role in this and the Government remains supportive of airport expansion where it can be delivered within our environmental obligations. The Government is supportive of airports bringing forward expansion plans by way of our existing policy frameworks for airport planning.¹³ These policy frameworks continue to have full effect, for example, as a material consideration in decision-taking on applications for planning permission.

Equally, it is critical that the existing capacity of airports is managed as efficiently as possible. Airport slots are used to manage capacity at eight of the busiest airports in the UK. The airport slot allocation system is key to the successful functioning of these airports, as well as the efficiency and competitiveness of the aviation sector as a whole. The current slot allocation system was devised in the early 1990s, at a point at which demand was growing quickly and the amount of available capacity at certain airports was being rapidly filled. Some airports are now effectively full, and therefore newly available slots at some slot-coordinated airports have become a rarity, creating a barrier to competition and new entrants to the market.



Figure 7: Aircraft at airport terminal, Manchester Airport.

¹³ Beyond the horizon – The future of UK aviation: Making best use of existing runways (2018) and Airports National Policy Statement: new runway capacity and infrastructure at airports in the South East of England (2018) are the most up-to-date policy on planning for airport development. The government is clear that expansion of any airport must be deliverable within the UK’s climate change obligations to be able to proceed.

What are slots?



- Slots are coordinated at ‘level three’ airports where demand significantly exceeds capacity.
- An airport slot is broadly defined as the permission to use the full range of airport infrastructure (runway, terminal, gates, etc.) necessary to operate an air service at an airport on a specific date and time, for the purpose of landing or take-off.
- IATA’s Worldwide Airport Slot Guidelines (WASG) provide a single set of international guidelines for the management and allocation of airport slots.
- European Council Regulation (EEC) No 95/93 set common rules for the allocation of slots at airports and was further implemented in UK law by the Airports Slot Allocation Regulations 2006. At the end of the transition period Regulation 95/93 was retained in UK law.

14 Bristol Airport is only Slot Coordinated in peak months.

Following the pandemic, we want to ensure the sector is well placed to recover and grow, so will support the sector to drive forward continued innovation and quality improvements. We also want our existing and planned airport capacity to be used in a way that supports the UK's objectives and delivers the best outcomes for industry and users.

We will therefore consider whether the current slot allocation system facilitates the most efficient operation of airports, and ensure that the available capacity is managed effectively. The Aviation 2050 consultation (2018) considered the need and opportunities for slot reform. We will build on this work and the changes to the sector since then, including in light of the pandemic, to consider how to support a competitive, transparent, and efficient slot allocation system, and create a framework which allows slots to be used to support the Government's aviation objectives.

We also want to make use of the freedom and flexibility afforded to us by the UK's departure from the EU. During the pandemic, we were able to use this by including new temporary powers in the Air Traffic Management and Unmanned Aircraft Act 2021 to allow alleviation from some rules of the slots regime in response to the impact of COVID-19. These powers have enabled bespoke alleviation measures to be implemented to reflect the needs of the UK aviation sector. We will further explore the opportunity afforded to us by the UK's departure from the EU when conducting a detailed review of the slot allocation system.

The sector and consumers need to be served by a fair, transparent, and competitive system that takes into account how the UK aviation sector has developed over time and supports global connectivity. We will therefore **publish a public consultation on options for longer term reform of the slot system**. This will be an important opportunity to work with industry

and international partners to collectively consider the future of the slots system.

Delivering our commitments

Enhancing our global impact is a key strategic theme to support recovery and to enable sustainable future growth. We will deliver this by:

- Engaging closely with the sector through **a new Aviation Council**. The Council will be jointly chaired by the Minister for Aviation and a sector representative, and will bring together attendees from across the whole of aviation, as well as key cross-Government and Devolved Administration representatives.
- Building relationships with key strategic international partners and enhancing our global connectivity through **the prioritisation of our work on Air Services Agreements**.
- Incentivising trade and investment by **ensuring new FTAs include liberal provisions** for the trade in auxiliary air transport services and for investment in aviation businesses.
- Recognising the role aviation can play in supporting UK trade ambitions through key avenues. This includes air freight, where this year the **Government will publish a cross-modal Future of Freight Strategy**, which will further explore the important role aviation can play in delivering the UK's freight ambitions. This also includes zero emission technology markets, where we will **ensure we create the right infrastructure and regulatory environment for the UK to be a leading market for these clean technologies**.

- Making the UK as attractive as possible to visitors through **delivering the commitments set out in the Tourism Recovery Plan**,¹⁵ recognising the essential role aviation plays in supporting the UK visitor economy. The plan set out an ambition to recover inbound visitor volumes to pre-pandemic levels of 41 million and spend of £28 billion by the end of 2023, a year faster than independent forecasts predict.
- Recognising the important **role aviation has to play in delivering the Government's** 'Race to a Trillion' refreshed export strategy, with the goal to deliver £1 trillion in exports annually by the mid-2030s.
- **Continuing to support sustainable airport growth.** Our existing policy frameworks for airport planning ensure that any such proposals are delivered within our environmental commitments, while also providing a stable framework for those funding expansion proposals.
- **Influencing the world through our leadership to develop common approaches** to support the delivery of our priorities, such as future pandemic resilience and agreeing a long-term emissions reduction goal for international aviation in 2022.
- Supporting the **adoption of an ambitious Long-Term Aspirational Goal by ICAO** that aligns with global temperature targets of 1.5°C.
- **Publishing a public consultation on options for longer term reform of the slot system**, ensuring that we have a fair, transparent, and competitive system that supports global connectivity.



Figure 8: Several aircraft at airport terminal, Gatwick Airport.

15 [Department for Digital, Culture, Media and Sport - Tourism Recovery Plan - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/tourism-recovery-plan)



Embracing innovation for a sustainable future



The future of aviation is exciting, with a wealth of new opportunities available to embrace a sustainable, green sector, and to push the boundaries of our expectations around how aviation can be used and what it can deliver for the UK.

With opportunities come challenges, and, as the sector recovers from the pandemic, we must redouble our efforts in addressing the next critical global challenge – climate change. Climate change is one of the greatest and most pressing threats facing the modern world, and decarbonising aviation will be an essential aspect of developing a sustainable future for the sector. We must also continue to take account of other local environmental impacts.

Putting the sector on course to achieve Jet Zero, through the delivery of the forthcoming Jet Zero Strategy, is a critical aspect of the future of the sector. It will require extensive collaboration, which is taking place through the Jet Zero Council. The Council's two areas of focus are on sustainable aviation fuels (SAF) and zero emission flight (ZEF), and the UK has a real opportunity to create these new industries, support thousands of jobs, and to take an international lead. We are already making positive progress and will continue to do so.

We must also recognise that as we develop new technologies and uses for aviation for local and regional journeys, we ensure they are sustainable. New aviation technologies, such as drones and electric vertical take-off and landing aircraft, present opportunities for us to lead the way internationally in aviation innovation, and provide new and improved services that can benefit the whole of the UK. We want these new technologies to play a critical part in meeting the Government's ambition to build back better, by utilising aviation to drive efficient outcomes to modernise and innovate across the transport network. Utilising data and services provided through space will also be vital to deliver efficient aviation networks and safely capture the new opportunities presented for connected and autonomous flight.

Airspace modernisation will be critical to achieving both our Jet Zero and aviation innovation ambitions, and has an important role to play in helping to meet decarbonisation targets. It will also ensure new and current airspace users can effectively operate in UK airspace, and deliver quicker, quieter and cleaner journeys.



Figure 8: Rolls Royce's Spirit of Innovation, holder of the all-electric world air speed record

4. Put the sector on course to achieve Jet Zero

This Government is committed to tackling climate change, and this ambition has been underlined through a **commitment in law to deliver net zero emissions by 2050 across the whole of the UK economy**. The Government has also **committed to a 77% reduction in emissions by 2035 on 1990 levels**. This ambition requires every sector of the UK economy to commit to decarbonisation, and aviation has a key role to play given its high carbon footprint on a per passenger basis.

The Government has already **established the Jet Zero Council** to drive forward essential change in this area, and we will **set the Sixth Carbon Budget (2033-2037) to include international aviation and shipping (IAS) emissions** for the first time. These emissions are an important part of our overall decarbonisation efforts and this change allows for them to be accounted for consistently with other emissions included within the Sixth Carbon Budget. Partnerships between the Government, industry, and experts, will play an essential role in making these ambitions a reality.

The **Jet Zero Council** brings together senior leaders in Government, aviation, aerospace, and academia with **the aim of achieving zero emission transatlantic flight within a generation**. The Council's two areas of focus are sustainable aviation fuels (SAF) and zero emission flight (ZEF) and the UK has a real opportunity to create these new industries, support thousands of jobs and to take an international lead.

Having a clear strategy for delivering aviation decarbonisation, which has been

developed following detailed engagement with the sector and other interested parties, is key. That is why, in July 2021, the Government **launched the Jet Zero Consultation**,¹⁶ setting out the Government's vision for the sector to reach net zero aviation – or Jet Zero – by 2050. The consultation asked for views on how the Government can best deliver on these ambitions.

The approach set out in the consultation focuses on the rapid development of technologies to ensure that air travel remains very much part of the UK's economic future. The Government's approach to achieve this is underpinned by three principles:

- **Clear goal, multiple solutions:** providing a clear Jet Zero goal for the sector whilst being open and honest that the nascent nature of the technological solutions mean that the precise pathway to reach that goal is currently uncertain.
- **International leadership:** in recognition that aviation is an international business and much of the sector's emissions are associated with international flights, and therefore international action is required if the Government's ambitions are to be achieved.
- **Delivered in partnership:** as success will require close collaboration between Government, academia, and industry – as exemplified by the Jet Zero Council.

The consultation also set out Government's intentions across five key measures that aim to:

- **Improve the efficiency of the UK's existing aviation system** – the UK's aircraft, airports, and airspace. The Government has

16 [Jet zero: our strategy for net zero aviation – GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/jet-zero-our-strategy-for-net-zero-aviation)

The benefits of sustainable aviation fuel

A UK SAF industry could generate between **£700m–£1.6bn** in Gross Value Added (GVA) per year.

Creating between **5,000–11,000** green jobs.

Helping the UK to ‘level up’ and not rely on oil imports, with production facilities across the whole of the UK.

Through the **2021 Net Zero Strategy**, we confirmed our ambition to see **10% SAF blended into the UK fuel mix by 2030.**

In October 2021, we announced **£180m of new funding to accelerate the development of new UK SAF plants**, building on the existing £15m Green Fuels, Green Skies competition.



We also announced a **£400m partnership with Breakthrough Energy**, through which SAF projects can bid for additional capital.

We are working to introduce a UK SAF blending mandate and are currently reviewing responses to the first SAF mandate consultation.

consulted on a proposal for airports in England to be zero emissions by 2040.¹⁷

- **Accelerate the development and deployment of sustainable aviation fuels (SAF).** The Government has consulted on a UK SAF mandate to drive the uptake of these fuels, and has recently confirmed the ambition of having 10% SAF blended into the UK fuel mix by 2030. This will be supported through £180 million of capital funding for the UK SAF industry.
- **Support the development of zero emission flight, such as hydrogen and electric powered aircraft.** The Government has an aspiration to have zero emission routes connecting the United Kingdom by 2030.

- **Ensure the Government uses carbon markets and greenhouse gas removals to drive down emissions in the most cost-effective way.** The Government will consult on amending the UK Emissions Trading Scheme cap to align with net zero and will review the sector’s free allocation.
- **Influence the behaviour of consumers** by providing more information about the environmental impact of their journey, and potential alternative airlines and routes, at the time of booking.

We are carefully considering the responses to the Jet Zero Consultation for the development of the final Jet Zero Strategy, which we will publish later this year.

17 [Jet zero: our strategy for net zero aviation – GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/jet-zero-our-strategy-for-net-zero-aviation)



Figure 9: Airbus

Tackling the localised impacts of aviation

In addition to being committed to delivering a green sector for the future, the Government also needs to tackle the more localised impacts of aviation. Air quality emissions and noise from aviation can have detrimental impacts on local communities, and addressing these impacts is an important aspect of a sustainable future for the sector.

The CAA recently assumed responsibility for most of the functions previously performed by the Independent Commission on Civil Aviation Noise (ICCAN) from April 2022, and the Government will continue to work closely with the CAA on these issues. This will include collaboration on the CAA's plans to create **a new Sustainability Panel, designed to provide independent expert advice on a range of environmental issues including carbon, noise and air quality.**

In addition, the Government set out new policy proposals to tackle these localised impacts through the Aviation 2050 consultation (2018).

These included a clearer noise policy framework alongside measures to incentivise best operational practice to reduce noise and measures to improve airport noise insulation schemes. As the sector recovers, and air travel volumes increase again, these aims remain very relevant and we **will set out next steps in 2022/23.**



Figure 10: ZEROe, Airbus

5. Capture the potential of new technology and its uses

As we look ahead to the future of aviation, there is huge potential for the UK to benefit from new types of aircraft such as electric/hydrogen vertical take-off and landing aircraft and drones. The UK is already a world leader in innovative aviation, and new or novel aircraft provide great opportunities to improve services, provide jobs, and reduce environmental impacts. Their development also has the potential to level up the economy and build an aviation sector that will drive efficient outcomes to modernise and innovate across the UK and internationally.

The aviation sector as a whole will have an important role to play in supporting these ambitions. This includes through grassroots General Aviation, which can offer a test bed for innovation through the availability of smaller aircrafts, as well as our important airfield network to support trials. Regional airports and new vertiports will have the opportunity to play a key role as these new vehicles offer local and regional travel options.

Over the next 10 years, the Government will work with industry to facilitate a period of rapid change and significant firsts in UK innovative aviation. We expect that the UK drone sector will deliver significant benefits across the UK. This will include undertaking surveys and performing deliveries, while advanced air mobility vehicles will offer consumers and industry new ways to travel. We will also begin to harness the opportunities offered by high-altitude platforms to improve connectivity and our digital infrastructure. An example of recent success in aviation innovation is the DfT supported Solent Future Transport Zone trial. The Government will work with industry to set the direction, provide the regulatory environment, and support trials and demonstrations to facilitate development of the market.

To capitalise on these opportunities, **we will set direction and will work closely with industry and the regulator to develop and publish a plan for the Future of Flight.** The plan will set out the steps the Government and the regulator will take over the next three to five years to facilitate bringing these new air mobility services to market. It will provide a clear direction on key Government work which will help businesses understand where to focus their resources and investment. As part of the plan, the Government will set milestones and targets for achieving routine beyond visual line of sight drone operations and advanced air mobility trials.

This will form part of a Government wide approach to delivering our vision for the UK to lead the way in the development and utilisation of aviation innovations. To support the development and delivery of the plan, the Government will establish a **Future of Flight Industry Group**, bringing together stakeholders from across these different technologies to address shared challenges in a coordinated way.

The Government will also **publish a joint statement with the Drones Industry Action Group** on our ambition for drones in the UK. The statement will complement the plan for Future of Flight and set out our commitment to deliver the necessary policy and regulatory framework to realise the economic, social, and environmental benefits for the sector.

A key component of the plan for Future of Flight will be to set out the next steps to create a modern and flexible regulatory framework, and leaving the EU presents the regulatory freedoms to make this possible. This work is underway, and the Government will work with the CAA to support innovation and ensure new technology can be integrated in a safe, secure and

Case study – The NHS and Drone Trials

The drone element of the Solent Future Transport Zone will see the development of a world first – an automated Unmanned Aerial Vehicle (UAV) air traffic control system, connecting medical facilities on the mainland with the Isle of Wight. This is a DfT funded project under Future Transport Zones.



Image provided by Apian.

In 2020, ferry services to and from the Isle of Wight were reduced due to COVID-19 causing supply issues for the NHS. In April 2020, elements of the drone proposal were fast tracked to ensure the NHS had a reliable, frequent delivery option beyond the ferry service.

The solution used a large fixed wing drone, flown remotely Beyond Visual Line of Sight (BVLOS) by experienced drone pilots on the mainland and the Island. Regulatory approval was fast tracked by the CAA to ensure that following numerous test flights medical goods were able to be delivered successfully to the Isle of Wight.

Following on from this success, the Isle of Wight NHS Trust and Apian have now begun a three-month drone trial to optimise the delivery and access to chemotherapy for their cancer patients. The Isle of Wight NHS Trust and Apian are researching the benefits to healthcare of transporting urgent clinical items over the Solent using UAVs. If the research is successful, this will include the world's first delivery of chemotherapy by drone in July 2022.

sustainable way. In autumn 2021 the **Future of Transport consultation**, including questions relating to the future of flight, was conducted. The responses are being analysed and the consultation response will be published later this year to support the development of the appropriate regulatory framework. **We are also providing additional funding to the CAA to expand its support to innovators through working with them to develop the regulatory framework and conduct the regulatory approvals.**

The Government is also investing in a range of initiatives to develop technology, and demonstrate and trial new aviation uses. Examples include investing in emerging technologies through the Connected Places Catapult (CPC) Drone Pathfinder Catalyst

Programme. Under the governance of DfT, the Department for Business, Energy & Industrial Strategy (BEIS), the CAA, and the CPC, this programme will showcase and demonstrate how drones can support different sectors of the economy. The Government has already awarded grants to enable six SMEs to undertake early-stage research exploring how drones can be safely integrated in UK airspace.

The Future Flight Challenge, a £300 million BEIS and industry-funded programme, is also supporting businesses to develop technologies that support the operation of drones, advanced air mobility and electric aircraft. We will continue to work together with these programmes to enable the adoption of new technologies and to support the sector to grow.

Using space to modernise our transport network

To complement our work on the future of flight, we will also utilise space-based technologies to deliver transformations in our transport systems. Spaceflight technology is crucial to today's connected world, with satellite technology impacting our day to day lives. From defence and security, to monitoring traffic and keeping us connected, spaceflight technology is shaping the way we operate. It also has a role to play in helping us protect the environment, and will impact the future of transportation.

The Government recently published the **National Space Strategy**,¹⁸ setting the ambition for the UK to be one of the most innovative and attractive space economies in the world. This included a focus on using space to modernise and transform our transport system and improve public services. Aviation is a key mode to apply this to and can be exemplified through Future of Transport Zone trials that relied on satellite enabled communications. As the independent regulator for UK spaceflight and as the UK airspace regulator, the CAA also has an important role in delivering this strategy with the Government owning the policy framework for this activity and sponsoring the CAA.

Modernising UK airspace for the future

Airspace modernisation will deliver quicker, quieter and cleaner journeys and more capacity for the benefit of those who use and are affected by UK airspace. It has an important role to play in ensuring the UK can meet its decarbonisation ambitions, and embrace opportunities presented by new and novel aircraft. The Government is committed to ensuring UK airspace can support the sustainable growth of the aviation sector.

In 2018 the CAA published its **Airspace Modernisation Strategy (AMS)**, setting out the initiatives required to modernise UK airspace. A key component of the AMS is the **Future Aviation Strategy Implementation (FASI) initiative**. FASI is a programme of terminal redesign of airspace to facilitate efficiencies. This programme, at the request of DfT and the CAA, will be coordinated by the independent Airspace Change Organising Group.

In recognition of the impact that the pandemic had on airport sponsors' ability to progress work associated with the FASI programme, the **Government provided £5.5 million of funding in 2021 to enable industry to remobilise their work, with a recent announcement of a further £3.7 million for 2022**. The airport sponsors will resume responsibility for funding further stages of the programme as the sector continues to recover.

The CAA's current review of the AMS has included a public consultation to ensure it will deliver the airspace needs of the future.¹⁹ The revised AMS will extend the strategy's focus from 2024 to 2040. It will take account of the latest developments in innovation and technology, aim for simpler airspace design, and introduce sustainability as an overarching

18 [National space strategy - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/national-space-strategy)

19 [CAA – Draft Airspace Modernisation Strategy 2022–2040](#)

principle to be applied through all modernisation activities.

Continued collaboration between the Government and key partners will be essential in delivering airspace modernisation objectives and realising the benefits this can bring to the sector. We will continue to work closely with industry, local communities, General Aviation stakeholders, environmental groups, the Ministry of Defence (MOD) and others to deliver the strategy.

Delivering our commitments

Embracing innovation for a sustainable future is a key strategic theme to support recovery and to enable our future vision for the sector. We will deliver on our commitments by:

- Engaging closely with industry, international partners and the CAA, which is critical to drive forward these priorities. We will continue to use Ministerial engagement with industry through the **Jet Zero Council and Airspace Strategy Board** and **establish a Future of Flight Industry Group** to discuss and deliver these priorities. We will also ensure existing Government and industry groups align with the work of the new **Aviation Council**.
- Setting clear direction on achieving Jet Zero through the publication of the **forthcoming Jet Zero Strategy**.
- **Working with the Aerospace sector, to deliver innovative solutions** to the challenges of developing and deploying new technologies, plus the infrastructure required to facilitate their use, which will be critical to delivering on the Government's Jet Zero ambitions.
- Delivering on aviation related commitments set out in the UK **National Space Strategy**, including on how we can use space to modernise and transform our transport system and improve public services.
- Providing **£9.2 million funding** to enable industry to remobilise their work on delivering the FASI programme.
- **Supporting the CAA's refresh of the Airspace Modernisation Strategy** to provide clarity for the sector on next steps.
- Working through the **new Future of Flight Industry Group, to develop and publish a plan for Future of Flight**, for the future of new aviation technologies in the UK.
- **Publishing a joint BEIS/DfT statement with the Drones Industry Action Group**, setting out a clear ambition for the future of drones in the UK.
- Continuing to ensure aviation ambitions and deliverables for jet zero and future of flight technologies complement wider Government deliverables, including the **Net Zero Strategy** and the **UK Counter-Unmanned Aircraft strategy**. We will also ensure alignment between aviation deliverables and aerospace commitments relating to sector decarbonisation, security and trade and investment.
- Continuing to support innovation through ensuring our regulatory framework is futureproofed for the UK and that our airspace is safely used. This will include shortly **publishing the Future of Flight consultation response**.
- Continuing to support competitive programmes, such as the **Future Flight Challenge Fund**, to further enhance aviation innovation.
- **Reviewing the effectiveness of the policy framework for noise**, including its application to new types of aircraft, and set out new measures where appropriate.



Realising benefits for the UK



Source: CAA.

Aviation has an essential role to play in delivering a wide range of benefits for the UK and supporting the Government's levelling up agenda. Not only does it provide essential connectivity across the whole of the UK, it also presents huge economic, social and heritage opportunities for local areas and delivers a wide range of skilled jobs.

Aviation plays an important role in many of our local communities. It is essential for the jobs and economic activity it directly supports, as well as supporting other parts of the economy, including business and tourism, and attracting inward investment. We are committed to working with the sector to ensure we recognise the existing comprehensive aviation infrastructure across the UK, and continue to support regional airports and airfields. We will also explore ways aviation can help boost UK domestic and union connectivity.

When recognising the importance of aviation for the UK, we must also recognise its intrinsic link to our hugely successful aerospace sector. The UK's aerospace sector is a global leader in producing some of the most technical parts of an aircraft (engines, wings, and advanced systems), supported by world-leading research and development capabilities. This important work is driving forward the development of new and emerging technologies that will help deliver Jet Zero air travel, and will play a critical role in meeting the Government's commitment for a net zero economy by 2050. Aerospace also provides high skilled, well-paid work in every region and country of the UK, directly employing over 100,000 people.²⁰

Skills are also at the heart of a successful aviation sector, and unleashing the potential of the next generation of aviation professionals has never been more important. We will work closely with industry and the CAA to understand skills needs, and continue to take targeted action to ensure a diverse workforce for the future. As the sector modernises, it will need to draw on a wider range of skills, such as artificial intelligence, data management, and environmental engineering. It is important that the Government and the sector work together to ensure we have the skills needed for the future.

General Aviation is also an essential aspect of realising benefits for the UK, as it represents the grassroots and an entry point into the sector. It has an essential role to play in delivering local benefits and supporting a wide range of goals. This includes improved domestic and international connectivity, innovation, decarbonisation, and skills; as well as providing a number of social and heritage benefits to local communities.

20 BEIS analysis of ONS employment data

6. Unlock local benefits and level up

Our extensive airport, airfield and aviation infrastructure network plays an essential part in unlocking local benefits and supporting aviation throughout the UK. Prior to COVID-19, the UK had an expansive domestic aviation network. Ensuring this network is supported is key to achieving the positive economic outcomes the Government is determined to deliver for the whole of the UK. The network supports jobs, investment, trade, and tourism for areas and regions across the UK. It also plays a vital role in ensuring people are able to connect easily across the union and regions.



Map of UK airports with regularly scheduled commercial flights

As of March 2022.

For presentational purposes, this map depicts the location instead of the full name of the airports.

Regional airports are an essential part of this network and they have suffered significant downturns as a result of the pandemic. Given the important role they play in supporting local economies, this downturn has had wider impacts for local areas. However, with international travel reopening, and Government support through the renewal of the **Airport and Ground Operators Support Scheme** (AGOSS), these airports are well positioned to recover.

Airport and Ground Operators Support Scheme (AGOSS)

AGOSS was introduced to support eligible commercial airports and ground handlers in England in recognition of the impacts of COVID-19. AGOSS has supported airports to maintain commercial activities to enable passenger travel and the movement of goods during a period of unprecedented drop in demand. It will have made available up to £175 million worth of support by the end of the financial year 2021/22, with the Autumn Budget 2021 extending the provisions of the scheme to Spring 2022.

Airports and airfields can also play a wider role in addition to providing connectivity. They offer potential for highly skilled, dynamic, and innovative businesses to grow and flourish. Several regional airports have diversified into additional functions, such as pilot training and, in the case of Newquay Airport, hosting the UK's first spaceport. Some airfields also host and service historic aircraft fleets or museums, alongside training organisations, maintenance and manufacturing firms and emergency services.

Our ambition for aviation to continue to support domestic and union connectivity, as well as helping local communities to flourish, aligns with the recently published White Paper on 'Levelling Up the United Kingdom'.²¹ The White Paper sets out in detail actions that the Government will take to generate economic growth across the UK and deliver jobs for local communities.

An important aspect of the levelling up agenda will be establishing eight Freeports in England and at least one Freeport in Scotland, Wales and Northern Ireland following our exit from the EU. Freeports benefit from a range of incentives, including tax reliefs, simplified customs arrangements, and local retention of business rates. They also provide for a supportive planning environment, regeneration funding, and Government support around trade, investment, and innovation. These incentives will enable Freeports to become national hubs for commerce, bringing jobs and opportunity to port areas across the UK – including airports. For example, the East Midlands Freeport promises to create a globally connected, world-leading advanced manufacturing and logistics hub at the heart of the UK and centring on the East Midlands Airport.

Increasingly airports are becoming regional transport hubs, supporting multiple businesses, labour markets, and population centres. Reliable and efficient surface access connections are an important part of achieving this. We expect airports, through their surface access strategies, to set targets for sustainable passenger and staff travel to and from the airport.

Airport expansion also has a key role to play in unlocking local benefits and levelling up. We are supportive of airports bringing forward expansion plans where justified. Our existing policy frameworks for airport planning remain in effect, providing a stable framework for airports to grow within our strict environmental criteria.

21 [Levelling Up the United Kingdom – GOV.UK \(www.gov.uk\)](https://www.gov.uk/levelling-up-the-united-kingdom)

Case Study: Spaceport Cornwall

Spaceport Cornwall is a project between Cornwall Council, Cornwall and Isles of Scilly Local Enterprise Partnership, Goonhilly Earth Station and Virgin Orbit. It will offer horizontal satellite launch services from Cornwall Airport Newquay. The site offers:

- A 2,744m long runway
- Direct access over the sea
- Adjoining military site RAF St Mawgan
- Ground handling equipment
- A new Aviation Centre including space systems integration, mission operations facilities, laboratories/R&D workspace
- Rocket test facility

Supported through funding by local and central Government, Spaceport Cornwall is launching the region's new space ecosystem. The renowned Goonhilly Earth Station, the world's most capable satellite ground station, is also offering its services alongside the spaceport. Collaboratively, Cornwall offers broader opportunities than just launch, including:

1. Mission control and tracking services
2. Countless downstream application companies and
3. Aerospace Cornwall, which offers funding for research and development

All this activity has led the space sector in Cornwall to successfully grow by 164% since 2010. Spaceport Cornwall is determined to lead on more sustainable launch practices. The Spaceport Cornwall team is working closely with schools, colleges, and higher education institutions across the region to build the skills base to meet the needs of the space industry. An inspirational outreach programme is being rolled out across Cornwall, aiming to engage with every primary and secondary school, with live sessions with our partners, Virgin Orbit in California.

Our existing policy on planning for airport development²² supports our objective to realise benefits for the UK and demonstrates our commitment to growth, within strict environmental limits. It continues to have full effect, as a material consideration in decision-taking on applications for planning permission. The Government is clear that any

expansion of any airport must meet its climate change obligations to be able to proceed.

The Government will support a limited number of air routes into London if they are at risk of being lost and there are no viable transport alternatives. We are exploring further opportunities to utilise PSOs, alongside other policy measures, towards meeting our ongoing

²² Beyond the horizon – The future of UK aviation: Making best use of existing runways (2018) and Airports National Policy Statement: new runway capacity and infrastructure at airports in the South East of England (2018) are the most up-to-date policy on planning for airport development.



Figure 11: Virgin Orbit CEO Dan Hart, UK Prime Minister Boris Johnson and Secretary of Transport Grant Shapps view LauncherOne at Spaceport Cornwall ahead of the 2021 G7 summit, DFT/No. 10.

regional connectivity and ‘levelling-up’ objectives. The Government jointly funds three PSOs into London from Dundee and Newquay since 2014, and from City of Derry since 2017. For routes within a single Devolved Administration, funding and management of these routes is the responsibility of the relevant administration.

The **Union Connectivity Review (UCR)**²³ published on 26 November 2021 makes recommendations to improve transport connectivity and enhance quality of life and economic opportunities across the UK. The report and its recommendations were made independently of the Government and is considering Sir Peter Hendy’s recommendations carefully. This includes engaging with the Welsh Government, Scottish Government, Northern Ireland Executive and other stakeholders to discuss how best to develop options that work

for all the people of the UK, and the Government aims to respond this year.

The UCR made a recommendation to revise existing PSO rules. The recommendation stated: “Where journeys are too long to be reasonably taken by road or rail, the UK Government should: Revise existing subsidy rules for domestic aviation to allow support for routes between different regions of the UK (rather than just to and from London) and to allow multiple airlines to serve a single route.”

PSOs play a vital role in supporting domestic connectivity and can support levelling up and enhance union connectivity. As outlined in the Benefits of Brexit²⁴ policy document published in February 2022, we can also reform our PSO routes eligibility requirements and conditions set out in retained EU legislation to align PSO policy with Government objectives for levelling up and

23 [Union connectivity review: final report - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/101422/union-connectivity-review-final-report.pdf)

24 [Cabinet Office - The benefits of Brexit - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/101422/benefits-of-brexits-policy-document.pdf)



Figure 12: Loading cargo onto an aeroplane at Heathrow Airport.

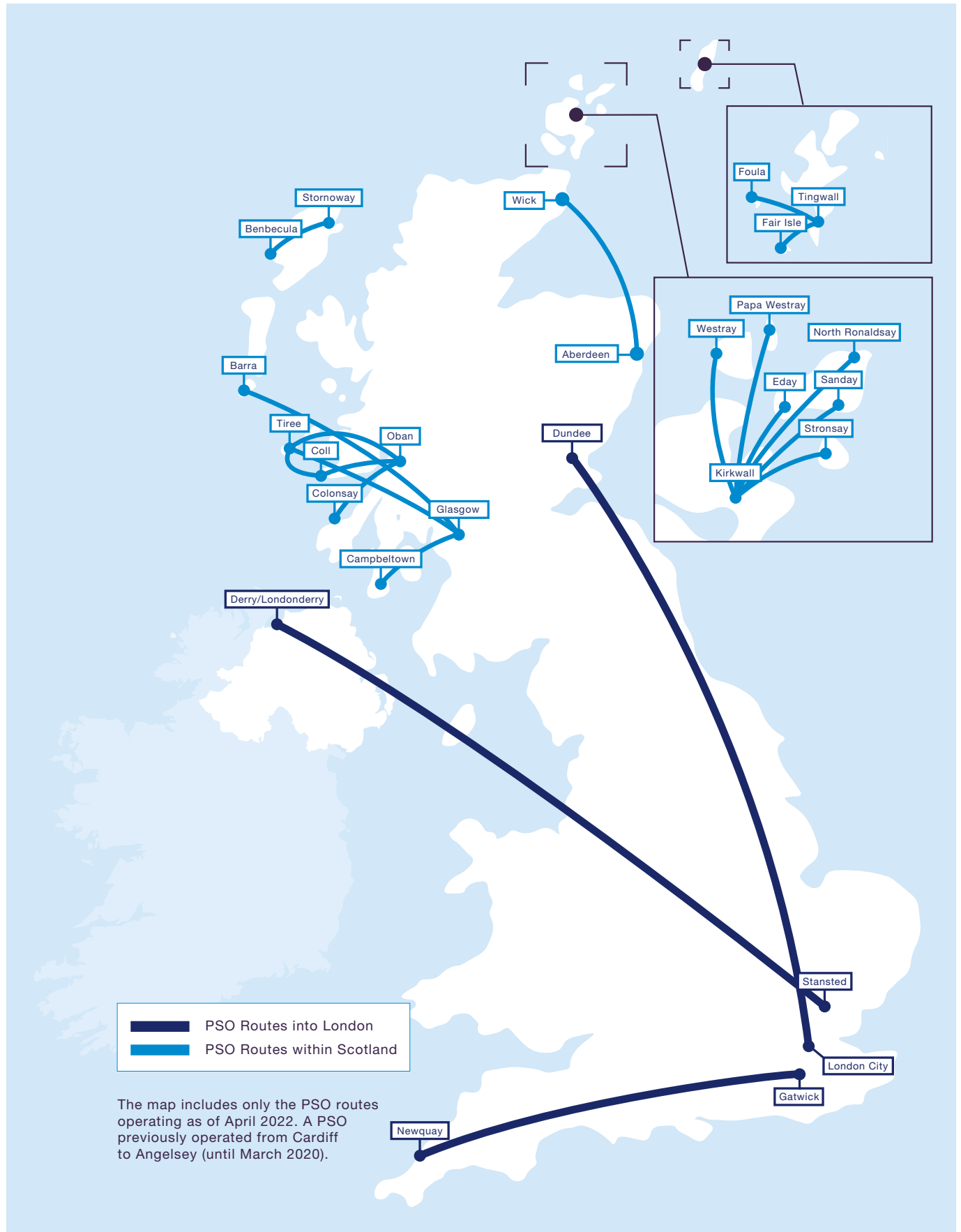
the environment. As part of the Jet Zero consultation we set out the potential for future PSO routes to use SAF or zero emission technologies.

Our aim is to have a thriving domestic aviation sector where there are no PSOs operating as they have all returned to commercial operations. However, this policy will protect vital connectivity that is in danger of being lost.

Linked to our commitments on supporting domestic connectivity, and its contribution to levelling up, the Government announced that **from 1 April 2023 domestic APD will be cut by 50%**. In addition, the Government will introduce a new ultra-long-haul band, covering destinations with capitals located more than 5,500 miles from London to align APD more closely with the Government's environmental objectives.

These collective actions will help ensure that domestic aviation continues to offer excellent connectivity across all parts of the UK, and that local areas continue to benefit from the economic opportunities presented by aviation.

Domestic PSO routes in operation



7. Unleash the potential of the next generation of aviation professionals

The skills of the aviation workforce in the UK have and always will be critical to its success, and unleashing the potential of aviation professionals of the future has never been more important. Aviation has always played a crucial role in the success of local economies. This includes through creating growth, jobs, and inward investment into communities, playing an integral role in the Government's ambitions to level up the economy. Before the pandemic, the UK aviation sector supported jobs spread across all regions of the UK, including 141,000 air transport jobs, and 114,000 aerospace jobs directly.

As the sector recovers, it is important that aviation retains its existing skilled workforce as well as inspiring people throughout the UK to choose aviation as a career. This includes delivering opportunities across the whole range of occupations the sector supports, such as engineers, pilots, ground handlers and hospitality workers.

Fulfilling our ambitions for the aviation sector will require a skilled and diverse workforce who can support the range of opportunities and challenges facing the sector. This includes areas such as recovering from the pandemic, decarbonisation, and the emergence of new technologies. The Government has therefore embarked upon a multi-faceted approach to deliver the future workforce that the sector will need as it moves forward.

Retaining existing skills within the sector

In order for aviation to thrive, it is vital the UK utilises individuals' existing experience to ensure we maintain our international reputation as one of the best aviation sectors in the world.

Throughout the pandemic we have taken particular measures to support the existing workforce, including through the **Aviation Skills Retention Platform**. As part of the Government's aviation support package through the pandemic, the Government launched the Platform, specifically designed to help retain vital skills within the industry, and in turn support local communities that benefit from aviation related jobs. This platform supports those aviation sector workers who are currently out of work or facing redundancy to register their skills to enable them to find an alternative role within the sector.

The platform also provides funding for training courses to provide opportunities for aviation sector employees who are out of work to enhance and diversify their skills. This complements the Government's Flexible Support Fund and Rapid Response Service to support aviation workers at risk of redundancy to stay in employment or move between sectors.

Following its success, the Government is committed to continuing to develop the platform, including expanding its purpose beyond pandemic support. This will include introducing training opportunities and information for those interested in aviation to ensure it meets our ambition to build a sustainable aviation sector that is equipped to meet the skills needs for the future.

Supporting careers for all

Encouraging the next generation of aviation workers is essential. It will help ensure we have the right skills within the UK to deliver on our range of ambitions for aviation, including in areas such as decarbonisation and innovation.

Case Study – The Air League

The Government's *Reach for the Sky* programme includes the *Soaring to Success* programme, delivered by The Air League and funded by Government, which consists of a number of teaching modules, and an introduction to flying.

Modules across the programme include a range of exciting opportunities, focusing on areas such as an introduction to the aviation and aerospace industries, employability skills and career options, a *Build an Airline* challenge led by British Airways and the Air League, and an *introduction to flying in a glider* course at a British Gliding Association club.

On completion of the *Soaring to Success* programme, 70% of participants have an increased awareness of career opportunities in aviation. In addition, at least 70% of education professionals participating in the Air Experience days have an increased understanding and awareness of career opportunities within aviation which will help them to better communicate opportunities within aviation to those they work with. *Soaring to Success* demonstrates the high-level impact of outreach partner activities resulting in an increased awareness of careers within aviation.



Figure 13: The Air League

The Government has introduced several proactive initiatives to encourage and support those considering careers in aviation, including our *Reach for the Sky* programme, and the **Talentview Aviation** programme.

Launched in 2019, the Government's *Reach for the Sky* programme partners with industry, educators, and organisations to raise the profile of aviation. This is delivered through creating new and improved career pathways, and developing enhanced outreach activities with communities across the UK. The programme is

integral to the Government's ambition to ensure that aviation careers are accessible to all those interested, helping create a more diverse and inclusive workforce that draws on the skills and knowledge of all parts of our society.

The Government also recently launched **Talentview Aviation**, a free-to-use platform designed to help young people in schools, colleges and universities to find opportunities to join the sector. It also allows employers to showcase apprenticeship, traineeship and graduate vacancies. This platform is already

inspiring the next generation by showcasing the different routes into the industry and the rewarding career the aviation industry can offer. By providing a single portal where young people can see the range of careers open to them, we can help the aviation sector attract new talent from a range of diverse backgrounds.

Embracing diversity

If we want to see a successful aviation sector for the future, which includes representatives from a wide range of backgrounds, we need to take steps to ensure the Government and the sector are promoting aviation careers to a wide audience.



“...Aviation changed my life and gave me purpose and happiness which comes with it. I look after a British heritage aircraft and heard dozens of people say that a day with it was one of the most memorable ones in their lives. I want to share the life changing aviation experience with as many people as possible and ensure that our heritage continues to inspire our future generations.”

Tetyana Shevchenko

We have recently appointed **twelve new Aviation Ambassadors**, who champion aviation as a place where people from all backgrounds are welcome. The Aviation Ambassadors’ work will complement our ongoing activities in the *Reach for the Sky* programme. They represent outstanding role models from the UK aviation industry who will inspire the next generation to take up aviation careers. They champion diversity, inclusion and accessibility in aviation careers and related jobs, and work in partnership with the CAA and the sector to better understand and plan for the future skills needs of aviation across the UK.



“As a child, I wish I had access to some of the aviation opportunities I’m involved in now. It’s about young people seeing someone they can actually see themselves becoming. You can’t be what you don’t see – how true is this statement. This is also why it’s so important to have real diversity within our ambassadors, as there are still perceptions around what scientists, doctors and pilots look like. I feel a great sense of responsibility as a STEM ambassador from a BAME community to ensure I’m a strong role model. Storytelling is a powerful tool – I would welcome the opportunity to use mine to inspire those from disadvantaged communities.”

Kanchana Gamage

Over the course of 2022, the Ambassadors programme will support the aims of the *Reach for the Sky* programme further with an enhanced role in seeking to proactively engage with universities and schools. This will include emphasising the breadth of opportunities that the sector offers and supporting and encouraging interest in embarking on careers in the aviation sector.



“I applied to be an Aviation Ambassador because I felt that the role would help me reach out to more young people about the wonderful opportunities within aviation. I was already speaking at schools and universities but the opportunity to get involved in the ‘*Reach for the Sky*’ programme would not only benefit me in my capacity to talk and motivate others but would also help me reach more young people.”

Travis Ludlow

The CAA has a key role to play in supporting the aviation sector to attract a skilled, committed, and diverse workforce for the future. Working closely with Government, the CAA is delivering a range of initiatives to boost diversity, including through holding and supporting a range of events. This includes **Girls in Aviation Day, International Women in Engineering Day, National Careers week, British Science**

Week, and school outreach activity. The CAA also recently launched a dedicated STEM website to provide access to aviation-specific teaching tools and resources, as well as details of upcoming events and campaigns. 2022 will also see the first virtual work experience programme coordinated by the CAA to inspire young people to explore careers in STEM and aviation. An interactive career map has also been created to demonstrate the breadth of careers in the sector.

To complement this, the Government has established partnerships with educational institutions, such as with Stansted College and Lancaster University, to showcase the diverse range of careers within the sector and promote aviation as an exciting and rewarding sector.

The high cost of training to become a commercial airline pilot can sometimes pose a significant barrier for young people seeking to pursue a career in aviation. The Government wants aspiring aviators from a diverse range of backgrounds to have the opportunity to train to become a pilot. For this reason, the DfT is currently commissioning independent research to investigate alternative financial models for pilot training and help industry and government work together to improve the accessibility of the profession.

Preparing for the future

We are also engaging widely with the sector to build a better understanding of future skills needs. This includes through the **Aviation Industry Skills Board**, designed to improve the quality of apprenticeships and other workplace skills and vocational educational activities. We will continue to work with this board, as well as wider stakeholder groups, to further understand and plan for the current and future skills needs of the sector.

The Government is also seeking to deepen our understanding and to identify initiatives that

could further support our overall skills ambitions. This includes promoting the use of apprenticeship standards for the aviation industry, such as those in ground operations and pilot training; and promoting use of the National Skills Fund to ensure that individuals can access support when training to gain valuable skills required to support the sector.

Given the transferability of skills between the aviation and aerospace sectors, the Government is also focused on ensuring policies take this into account and are aligned to deliver the skills the UK needs for the future. This includes working closely with both sectors to understand and address any potential skills gaps. Through identifying these skills gaps together, we can collectively ensure the sector has the necessary skills and diversity to remain one of the strongest aviation sectors in the world, supporting economic growth and jobs throughout the UK.

Our ambition to deliver the skills the UK aviation sector needs for the future is part of the Government's work to promote transport skills more broadly. **We have recently published our paper, *Transport Labour Market and Skills: Call for Views and Ideas*.**²⁵ This is the start of the Government's conversation with the transport industry and other key stakeholders about developing a highly skilled, diverse transport workforce that is fit for the future. The paper sets out the key labour market and skills challenges across the transport sector; it also highlights five proposed 'pillars' that the Government and industry will work together in tackling. These pillars include 'Preparing for future skills' and 'Improving training and employment'. Responses to this consultation will help us to understand and plan for the skills the transport sector will need in future, which in turn will help us understand and prepare for the future skills requirements of the aviation industry.

25 [Transport labour market and skills - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

8. Make the UK the best place in the world for General Aviation

General Aviation (GA) forms the grassroots of aviation in the UK, and has a vital role to play in the wider sector's success over the coming years. It is a wide-ranging and complex sector, encompassing any civilian activity that is not commercial air transport. This includes business aviation, emergency services and aerial work. It also covers personal transport, leisure, and recreational flying, as well as supporting services, communities, and heritage.

Through its vast reach, GA also has an important impact on levelling up, with airfields forming a critical part of national infrastructure and connecting people to aviation for a wide variety of reasons. GA supports a range of

critical functions for the sector, such as flight training, business travel and aircraft maintenance and manufacturing services. It also provides the entry point for many careers in aviation. In the DfT's recent GA survey, 60% of respondents indicated that they had offered some form of pilot training 12 months prior to March 2020 (60% of 152 responses); 40% of respondents offered a Private Pilot Licence (PPL); and 23% of respondents offered PPL Night Rating.²⁶ As the aviation sector evolves, GA will also be vital in supporting innovation and decarbonisation.

These are just some of the significant and exciting future opportunities for GA to drive



Figure 14: Multiple GA aircraft on display at an airshow, CAA.

26 [General aviation airfields survey 2020 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/874447/General-aviation-airfields-survey-2020.pdf)

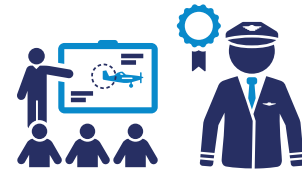
We want the UK to be seen as the best place in the world for GA, but what does this look like?



Growing GA activity: sport/leisure, commercial and business aviation – to support a thriving aviation sector and its associated services



Proportionate, risk-based and consistent approach to regulation that delivers high quality safety outcomes



Thriving commercial and private pilot training sector, and a vibrant aviation support services sector including maintenance and engineering



Increasing access to airspace for all users



Supporting an innovative, environmentally sustainable sector and encouraging the use of new technology



Strong international partnerships and seen as a global example of best practice



Inspires the next generation of aviation professionals



Effective and meaningful engagement with stakeholders



GA infrastructure that is appropriate in its extent, capability and location – and enables GA activities to thrive

modernisation, innovation, and efficiencies across the aviation sector, and to play a key role in supporting the UK's global competitiveness. The importance of GA to the future success of UK aviation and the economy cannot be overstated – the £4 billion sector lies at the heart of UK aviation. Whilst GA is vital to aviation's future, it also supports our aviation heritage, hosting globally recognised air shows and protecting historic aviation assets, preserving the UK's proud aviation history, and inspiring the next generation.

Like all aspects of aviation, GA has faced a number of challenges as a result of the pandemic. Both domestic and international GA activities have been heavily restricted, and the Government's furlough and financial loan schemes have been an important source of support.

Business aviation, aviation that excludes scheduled airlines and flying for sport or recreation, has a focus on commercial or business activities. It covers both manned and unmanned, data collection, freight, and carriage of people – and forms an extremely valuable component of GA. Whilst the sector has been particularly impacted by the pandemic, it was able to provide considerable support, with business aviation flights transporting vital medical supplies and services, allowing emergency services to operate. Looking ahead, as the entire aviation sector seeks to build back better, GA will play a key part in delivering a modern, innovative, efficient, and globally competitive sector.

The **Government's GA roadmap**,²⁷ published in April 2021, will play a central role in the future of GA. The roadmap set out the Government's vision for the UK to be one of the best places in the world for GA, focusing on the **five key pillars** of policy and governance; regulation and safety; airfield protection; GA airspace reform;

and skills and technology. The roadmap sets out in detail the Government's commitments under each of these pillars to achieve our ambitions.

- **Policy and Governance:** working in partnership with the CAA and stakeholders on policy development; ensuring policy focus and funding to support GA activity, improve governance and ensure meaningful engagement with the sector.

Collaboration with the GA sector and CAA will remain at the heart of this work. The Government has previously had, and will look **to appoint a new GA Advocate** to support this, building on the foundations established by the previous GA Advocate as well as the former GA Champion role appointed in 2015. We will continue to work closely with stakeholders on key priorities through a range of key forums, including the General and Business Aviation Strategic Forum, the General Aviation Partnership, and the GA for Business forum. This will be further complemented by GA representation on the Aviation Council. Furthermore, we have already provided additional funding to support the delivery of the CAA's GA Change Programme, including to seize opportunities from leaving the EU, and will continue to work closely with the CAA and the GA sector to deliver this effectively.

- **Regulation and Safety:** ensuring regulation promotes safety and is proportionate and risk-based, enabling the sector to thrive; seizing opportunities for delegation, deregulation and innovation; and developing strong international partnerships.

This will include **implementing the recommendations arising from the CAA's GA Safety Review**. This includes making guidance and advice on GA regulation more accessible, continuing to seize the benefits of leaving the EU for GA users, and creating an

27 [General Aviation Roadmap - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/94444/General-Aviation-Roadmap-2021.pdf)

independent review panel to consider complaints by individuals about the processes and procedures in how the CAA takes regulatory decisions.

- **Airfield Protection:** Supporting the strategic infrastructure network and assets of GA for activities today and to secure it for the next generation.

This will include building on recent delivery of the **Airfield Development Advisory Fund**. The fund provided bespoke advice to airfields to help futureproof their operations. We will maintain our close engagement with airfields and associated businesses to help them thrive in the future, including exploring options for alternative income generation to protect future viability. This will include helping the sector prepare for the adoption of greener infrastructure and emerging technologies.

In addition, the CAA's Airfield Advisory Team's will continue to provide valuable support and

advice to airfields. We will continue to seek to ensure plan making and decision taking has appropriate regard to the importance of the national network of GA facilities, in line with the National Planning Policy Framework²⁸ which seeks to recognise the importance of maintaining a national network of general aviation airfields, and their need to adapt and change over time. We will **publish guidance for Local Planning Authorities on the importance of GA** to ensure that GA is better understood and informs local planning and decision taking.

- **Airspace Reform:** reforming and modernising airspace to ensure an efficient, safe, interoperable, and integrated airspace for all users.

We will continue to support effective representation of GA in airspace policy to ensure the needs of existing and future GA users continue to be considered as part of



Figure 15: A RotorSport UK aircraft in-flight at a Light Aircraft Association Rally 2019.

28 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf

airspace modernisation. This will also involve ensuring safe integration of GA users with unmanned systems. The refresh of the Airspace Modernisation Strategy includes proposals that will better enable GA to support the integration of new users into our airspace and minimise their impact on existing users. As part of this, we will continue to **promote the uptake of electronic conspicuity devices** to improve safety and support integration of GA and other users across airspace, through the provision of funding to support take up of electronic conspicuity grants. In November 2021, the DfT and the CAA stood up the Surveillance Standards Task Force, working with electronic conspicuity manufacturers to develop new, voluntary specifications which will further promote safety and interoperability for airspace users. These specifications will be published in spring 2022.

In addition, we will continue to **promote the uptake of Global Navigation Satellite System approaches** that improve safety and are expanding the programme to support blue light services.

- **Skills and Technology:** inspiring the next generation of aviation professionals, incentivising innovation and green skills and the use of new technology, making aviation diverse, accessible, and sustainable.

We recognise the important role GA plays as the grassroots of the sector and the entry point into aviation careers. Working collaboratively with the sector to implement this roadmap will help support both building back better following the pandemic and seizing the opportunities and meeting the challenges of the future. This includes GA's role in supporting the wider aviation sector to embrace new and emerging innovative aviation technologies and supporting our key commitments on Jet Zero and the Green Economy.

Delivering our commitments

As we recover and build back better, we want to ensure that aviation is delivering benefits to the UK. We will do this by:

- Supporting domestic and union connectivity **through AGOSS and our PSO policy.** As part of the independent Union Connectivity Review there were recommendations on PSO policy which will be carefully considered as part of the Government's response. The Union Connectivity Review's independent recommendations include updating PSO policy to allow PSOs to operate between UK regions, and to introduce Open PSOs, which would support specific qualifying routes by removing APD and allowing multiple airlines to operate where a journey is too long to be reasonably taken by road or rail.
- Working closely with local areas to ensure that aviation success delivers local benefits across the UK, including in line with the priorities set out in the recently published 'Levelling Up the UK' White Paper.²⁹
- Prioritising the need to develop a diverse and skilled workforce for the future, including through the role of our **twelve Aviation Ambassadors**, and maximising our existing programmes, including *Reach for the Sky*, the **Aviation Skills Retention Platform and Talentview Aviation.**
- Recognising the important relationship between aviation and aerospace, including maximising the mutual benefits that can be delivered through innovation, trade and investment, and skills.
- Delivering **on the commitments and ambitions set out in the General Aviation Roadmap**, including close collaboration on the delivery of the CAA's GA Change Programme.

29 [Levelling Up the United Kingdom – GOV.UK \(www.gov.uk\)](https://www.gov.uk/levelling-up-the-united-kingdom)

Delivering for users



Consumers are at the heart of UK aviation, and ensuring that the sector continues to deliver effectively for all consumers will be essential for its future success. The pandemic has highlighted more than ever the importance of air travel for connecting people around the world, and supporting families, friendships, and enabling global connections to thrive.

The challenges the pandemic has presented have not only re-emphasised the vital role aviation plays in supporting face-to-face connection, but have also shifted and re-focused consumer expectations. Protection of consumer rights, health, safety, and security when travelling by air have always been the cornerstones of a successful UK aviation sector. As we emerge from the pandemic, and look ahead to a modern and more efficient sector in the future, it is vital we continue to deliver for consumers and work collectively to rebuild confidence and trust following an incredibly challenging period.

In delivering for consumers, we need to also continue to maintain our world-leading standards on safety and security, which represent the foundations of secure travel. This will include regularly modernising and adapting our approach to safety to ensure it continues to meet the needs of the sector and consumers. We also need to ensure our security activity always stays ahead of the threats to aviation to protect the UK and continues to promote the most effective security standards globally.



Figure 16: Child onboard an Easyjet flight from Gatwick to Jersey with tablet, DFT.

9. Improve the consumer experience

Consumers should always feel confident when they travel that they will have a positive experience. This can be improved through ensuring their rights will be protected, travel is accessible for all, there is clear communication, and smooth border experiences.

Consumer protection

The pandemic has brought consumer financial protections into particularly sharp focus, where plans have more frequently had to change at short notice. Prior to the pandemic, the Government was already considering ways to enhance consumer rights, and the pandemic has further highlighted the importance of this.

Consumer confidence is absolutely crucial for the sector's success. During the pandemic the vast majority of the industry continued to do the right thing and meet their obligations to consumers. However, the negative actions of a small minority, including significant delays in the provision of refunds, has unfairly impacted the whole industry.

The CAA has already undertaken a review of airline practices and worked collaboratively with industry resulting in the majority of airlines now providing refunds to consumers within seven days.

To help ensure consumers always receive the protection they deserve, the Government **recently launched a consultation** focused on improving consumer rights, considering **what additional modern and flexible tools could be used to enhance protections for consumers travelling by air.**³⁰ The consultation is, in particular, seeking views on powers for the CAA to enforce breaches of

aviation consumer rights, with a view to helping to reduce the burden on consumers when seeking redress for breaches of their rights. In addition to the CAA's powers, the consultation also seeks views on a strengthened Alternative Dispute Resolution (ADR) scheme that would provide consumers with another means of redress. It also explores the compensation levels available for delayed UK domestic flights.

The Government is also taking steps to enhance consumer protections in the instance of a company collapse. The Government will consider and deliver on recommendations arising from the **Airline Insolvency Review**,³¹ to ensure passengers are adequately protected and able to get home if their airline fails.

We are also taking steps to ensure that protection provided through the Air Travel Organisers' Licensing (ATOL) scheme remains fit for purpose. ATOL provides holiday makers booking flight-inclusive holidays with protection should their travel provider collapse. In 2021 the CAA carried out a **consultation on ATOL Reform**,³² exploring a number of ways in which ATOL could be placed on a more sustainable footing. We are working closely with the CAA and expect further consultation on firm proposals this year.

Inclusive travel for all

The Government's consumer consultation also considers that the Government and industry can take to make air travel more accessible for all. The UK prides itself on being an inclusive nation, which respects the needs of all individuals. It is therefore essential that this ethos applies to all aspects of the aviation consumer experience; everyone should have access to air travel if they

30 [Reforming aviation consumer policy: protecting air passenger rights - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/reforming-aviation-consumer-policy-protecting-air-passenger-rights)

31 [Airline Insolvency Review final report - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/airline-insolvency-review-final-report)

32 [CAA - ATOL Reform](https://www.gov.uk/government/consultations/caa-atol-reform)

wish, with the right support and protections in place to enable them to do so.

In 2018 the Government published the Inclusive Transport Strategy,³³ which outlines the Government's commitment to ensuring transport, including aviation, is accessible for disabled passengers and those with reduced mobility. The CAA has and will continue to lead on ensuring the aviation sector is accessible. This includes through enforcement of the current regulations, such as its airport accessibility framework. Accessible air travel is a key priority for the Government, and we are committed to building on this work as the sector continues to modernise. **We are seeking further views on accessible air travel as part of the aviation consumer policy consultation.** We will set out next steps on consumer rights reform, including in relation to accessibility, through our response to the

consultation. In addition, we will continue to work alongside the Disability and Access Ambassador for Airports, to help ensure airports are as accessible as possible.

Helping consumers understand their rights and responsibilities

Closely linked to consumer confidence is an ability for consumers to clearly understand their rights and obligations before they travel. It is essential that consumers have access to clear, transparent information to ensure they make an informed choice in deciding to travel or not. They also need to be well informed on how and where to get help if needed, and what is expected of them when they travel.

In order to deliver effectively for consumers, Government and industry need to collaborate to provide clear, concise information. Engagement



Figure 17: Passenger receiving a 'special assistance card' at Bristol Airport, which helps airport staff identify passengers who may need additional support or assistance as they travel through the airport, Bristol Airport.

33 <https://www.gov.uk/Government/publications/inclusive-transport-strategy>

between the Government, the sector and consumer groups throughout the pandemic has been critical. The importance of such positive relationships in developing consumer policy is becoming even more acute as passenger numbers are rising and aviation is starting to rebuild consumer confidence and modernise for the future.

The publication of the Passenger COVID-19 Charter was an important example of how this collaborative approach can positively provide reassurance to consumers to enable them to travel with confidence. Building on this, the Government will collaborate with industry and consumer groups to **develop an Aviation Passenger Charter**. The charter will be designed in partnership with the sector, in a similar way to how the Passenger COVID-19 Charter was developed. The purpose of the Charter will be to provide a helpful communication tool, which can be used as a clear, single information point for consumers, on what they should know when travelling by air. It will include information on their rights and responsibilities, and what they can reasonably

expect from the aviation industry. The Aviation 2050 consultation (2018) also considered the need and opportunities for an aviation passenger charter, and we will carefully consider the responses received in developing the charter.

Facilitating a smooth border experience

The Government's **2025 UK Border Strategy**³⁴ sets a goal for the UK border to be the most effective in the world. It has committed to a range of transformations to the 'ports of the future' at border crossing points, including airports. These transformations are designed to make the experience smoother and more secure for passengers and traders, while better protecting the public and environment.

A key ingredient will be efficiency of the processes at the border. Through joint working, all those involved can create a highly digitised and automated border to significantly increase productivity and enable swift and secure clearance for goods and people.



Figure 18: Passengers at North Terminal security E-Gates, Gatwick Airport.

34 [Cabinet Office - 2025 UK Border Strategy - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/2025-uk-border-strategy)

The passenger experience at the border is also an essential part of travel. As we recover from the pandemic, and passenger numbers continue to increase, we are committed to continuing our efforts to ensure a smooth experience for consumers at the border. This will include embedding more efficient management of border control processes for the benefit of air crew, passengers, and cargo. Essential to this work will be continued close collaboration between Government, industry, and international partners.

EGates have proved to be an effective method of increasing capacity at the border, and the COVID-19 pandemic has shown the importance of ensuring that passenger travel is as resilient as possible. The **Government has already committed to work with industry to develop a proof of concept for a contactless travel model for UK citizens based on biometric e-passport technology.** We will draw on experience of the COVID-19 pandemic to better prepare for future pandemics, banking the investment we have made in automating digital checks of health related measures and digitising the process. This will help to provide certainty and seamless operations for passengers and carriers. As part of electronic universal travel authorisations, we will also consider how preclearance of health measures could be integrated within this. This would help to further reduce friction in the passenger journey by reducing the need for manual checks of health documentation by carriers.

In addition, we will seek to drive global policy to ensure UK citizens and goods are able to move with minimal friction across other countries' borders. This includes collaborating internationally to secure uniformity in regulations and standards, as well as leading efforts to encourage further digitalisation around the world. We will continue to work closely with the

ECAC and other international groups/partners to influence the global agenda at ICAO. We will also **promote the ambition for the use of Digital Travel Credentials (DTCs) to support travel authorisations and contactless travel.** We will also use our experiences of the pandemic to call for the standardisation and interoperability of any new travel documentation as well as the use of trust frameworks.

Supporting consumers to make informed, sustainable aviation travel choices

Consumer behaviour will also play a part in decarbonising the aviation sector. There are ways we can provide consumers with greater opportunities to make sustainable, informed choices on their travel plans, and in turn incentivise industry to decarbonise. For example, by providing better information on the climate impacts of travelling on different routes, or on different airlines. A study by the International Council on Clean Transportation suggests that emissions per passenger can differ by up to 63% on the same transatlantic route.³⁵

The Jet Zero Consultation set out our proposal to work with the CAA to explore whether mandating the provision of environmental information to consumers at the time of booking a flight could influence consumer decision-making when presented with standard, reliable and accurate flight comparisons. We continue to work closely with the CAA in the development of our final Jet Zero Strategy, as well as looking at other ways to support consumers to make sustainable choices when booking flights, to reward those parts of the aviation sector that move more quickly to decarbonise.

35 [The international Council on Clean Transport - Transatlantic airline fuel efficiency ranking, 2017](#)

10. Retain our world-leading record on security and safety

In addition to understanding their rights and responsibilities, and feeling financially protected, two of the most fundamental foundations of air travel for consumers is that they are safe and secure when they fly. The UK prides itself on its reputation as a leader internationally on safety standards and security, and we will continue to use our influence internationally to ensure aviation all around the world is as safe and secure as possible.

Keeping people safe

The UK has an excellent safety record and is widely considered to be world-leading in delivering global aviation safety standards. As the sector modernises and evolves, it is important we continue to regularly review safety regulations and requirements to ensure they remain fit for purpose. We will ensure safety provisions and the safety regulatory framework keep pace with a sector that is continually evolving and modernising. It will be important to create the right balance between allowing emerging technologies to flourish and supporting a dynamic market, whilst equally maintaining the highest standards. We will achieve this— by providing carefully designed legislative mechanisms that allow standards to be clear but flexible.

In delivering this we will work collaboratively with all parts of the UK aviation safety system, including the CAA, Air Services Support International (who oversee regulation in the Overseas Territories), the Crown Dependencies, the Air Accidents Investigation Branch, the Maritime and Coastguard Agency and NATS. We lead the system through the State Safety Board to ensure an effective overall system that protects the safety of UK systems both in the

UK and overseas and prioritises our focus on the most significant safety risks.

Given the international nature of aviation, continuing our work to strengthen aviation safety globally is also essential. The UK is a powerful voice in global forums on safety, and our strong relationships with partner nations around the world also mean we are well positioned to seek to ensure high safety standards throughout the world. We will **continue to actively support ICAO's Global Aviation Safety Plan³⁶ and the Global Air Navigation Plan,³⁷** promoting continuous safety improvements. We will also seek to continue to influence the global agenda to facilitate the success of new and emerging technologies.

In addition, the Government is committed to taking strong and deliberate action where necessary to call out any safety deficiencies that threaten our citizens and industry. The UK's air safety list will continue to set a high bar for due process and responsiveness in identifying states and airlines of safety concern and tackling the risks they present. This approach will ensure that safety remains front and centre of everything the sector does, protecting consumers and everyone involved in aviation, whilst equally modernising to embrace innovation and aviation of the future.

The pandemic has also exposed the practical demands faced by aviation in protecting the health of passengers and managing the potential health impact of international travel. The Government will continue to work closely with the sector to ensure that at all times the UK's resilience and preparedness for managing such challenges remains as robust as possible.

36 [ICAO – Global Aviation Safety Plan](#)

37 [ICAO – Global Air Navigation Plan](#)

Keeping the UK secure

Aviation security standards have and always will be a top priority for the UK Government, and is another area where we are world-leading in our approach. COVID-19 has not reduced the aspirations of terrorist groups to conduct attacks against global aviation, and the Government and industry bodies will continue to work together to counter this complex threat.

The UK has always made a significant contribution to aviation security at home and across the world, through achievements such

as UN Security Council Resolution (UNSCR) 23091, which raised the profile of global aviation security. The UK was also a key contributor to the resulting inaugural **Global Aviation Security Plan**³⁸ to improve the global implementation of aviation security standards, which is now being implemented around the world.

The Government is also in the process of **refreshing its Aviation Security Strategy** to ensure it builds on and fully encompasses the broad range of work being done across the



Figure 19: Passengers at North Terminal security lanes, Gatwick Airport.

38 [ICAO - Global Aviation Security Plan](#)

Government and industry to remain ahead of the threat, on both a domestic and global level.

The strategy will recognise that, despite being a world leader in aviation security, the UK cannot be complacent in our fight against those who would threaten our way of life and the freedoms the UK population enjoys, and will acknowledge the changed context we find ourselves in. It will also set out where the Government will focus on strengthening and amending our domestic regulations.

One of the ways the Government is seeking to improve both security outcomes and passenger confidence is through innovative screening technologies, which are being delivered in cooperation with industry through our Next Generation Security Checkpoint programme. This will mark a step change in passengers' experience of security checkpoints at airports, and in our ability to detect prohibited items.

Leaving the EU also offers the Government an opportunity to consider whether there are new and better ways of structuring and updating our security regulations. For example, this could include providing more flexibility for screening equipment manufacturers to innovate and bring new products to market. Equally it is important, in this context, that we remain mindful of the need to retain mutual recognition of security standards and regulation between the UK and the EU.

Ensuring the CAA is match fit for the future

The CAA is a globally respected regulator and it provides a range of regulatory and support functions to enable the sector to function safely and securely. It has also played a key role in responding to the extraordinary challenges of the pandemic. Looking ahead, it is vital that the CAA, as the aviation sector regulator, remains committed not only to meeting its core responsibility to maintain the highest standards of safety, security and consumer protection, but also to being relentless in seeking improvements in its performance.

The CAA's role has evolved significantly in recent years, in particular due to the pandemic, EU Exit, and taking on space regulation. It will continue to evolve in future, particularly given the need to support new technology and decarbonisation. We plan to conduct a full public body review of the CAA, to ensure that it has the resources and capabilities needed to support the sector and to regulate effectively and proportionately in the future. We will also work to support the delivery of the CAA's strategy, which sets out its mission to improve aviation and aerospace for consumers and the public, and highlights its priorities and the principles in which it will deliver.

Delivering our commitments

Putting users at the heart of the aviation sector is key for ensuring a fit for purpose, successful sector for the future that works for consumers. We will deliver this by:

- Supporting consumer rights, by **consulting on improvements**, including what additional modern and flexible tools could be used to enhance protections for consumers travelling by air. This will include how to ensure air travel is as accessible as possible for all passengers. We will ensure these considerations remain aligned with wider work on consumer reform being delivered by the Department of Business, Energy and Industrial Strategy.
- Working with the sector and the CAA to develop **an Aviation Passenger Charter**, providing a clear, single information point for consumers on what they should know when travelling by air.
- Considering and delivering on recommendations arising from the **Airline Insolvency Review**, to ensure passengers are adequately protected and able to get home if their airline fails. We will also continue to protect passengers financially by working closely with the CAA to ensure protection provided through the **Air Travel Organisers' Licensing (ATOL) scheme** remains fit for purpose.
- Delivering on the Government's **2025 UK Border Strategy** goal for the UK border to be the most effective in the world. This will include Government **working with industry to develop a proof of concept for a contactless travel model for UK citizens based on biometric e-passport technology**. We will also draw on experience of the COVID-19 pandemic to better prepare for future pandemics, banking the investment we have made in automating digital checks of health related measures and digitising the process.
- Maintaining our world-leading record on safety, including through continuing to support **ICAO's Global Aviation Safety Plan and the Global Air Navigation Plan**. We will also continue to work in partnership with a wide range of organisations, including the CAA, Air Safety Support International (who oversee regulation in the Overseas Territories), the Crown Dependencies, the Air Accidents Investigation Branch, the Maritime and Coastguard Agency and NATS.
- Continuing to lead internationally on aviation security, supporting the global implementation of the Global Aviation Security Plan, as well as refreshing the UK's **Aviation Security Strategy**. As part of this we will also continue to work in partnership with the Home Office to stay ahead of any threats to the UK and to protect national security.
- **Working with the CAA** to deliver the Government's priorities for aviation, the CAA's strategy and to ensure that it is fit for the future.
- **Conducting a public body review of the CAA** to ensure it has the resources and capabilities needed to support the sector and to regulate effectively and proportionately in the future to commence.

Conclusion

The Government fully recognises the challenges that the aviation and associated sectors have faced over the course of the pandemic. The pandemic has had an unprecedented impact and created incredibly challenging levels of uncertainty, with countries across the world having to regularly adapt to protect the health of their citizens.

As restrictions have been lifted, and passenger demand increases, it is important that we recognise the huge value aviation adds to the UK. Restrictions on aviation during the pandemic have brought into stark focus the importance of air travel in facilitating vital connections. The pandemic has highlighted that, whilst some people travel for leisure, for many, aviation is an essential gateway to see family and support loved ones. It also plays an essential role in the transport of vital goods, such as medical supplies, around the world, and in delivering successful business outcomes for the benefit of consumers.

In this context, and as we look ahead to the recovery of the sector, now is the right time for the Government and the aviation sector to consider how we can best work collectively to embrace the exciting opportunities open to aviation over the next ten years, as well as how we can face the challenges ahead together.

This strategic framework highlights the Government's continued commitment to the

sustainable growth of the aviation sector. It also recognises aviation's vital importance to the UK, in terms of economic contribution, jobs, and the personal value it provides to individuals throughout our regions and nations. In addition, it sets out our key priorities for the next ten years, including a ten point plan for delivery, and how the Government will work closely with the sector, including **through the new Aviation Council**, to implement the commitments established through this framework.

We have a real opportunity as the sector starts to recover, to not only see passenger demand return, and the sector to flourish again, but also to modernise and create a greener, more sustainable sector for the future. A sector that leads the way internationally on future key issues, be that learning lessons from the pandemic, delivering Jet Zero, or embracing the opportunities presented by aviation innovation. The UK will continue to have one of the strongest aviation sectors globally, including always putting consumers first, and having the safest and most secure sector in the world.

This strategic framework will play an important part in uniting the Government and the sector. In having a clear plan to meet our key commitments over the next ten years, together we will deliver a modern, innovative and sustainable aviation sector for the future.

Abbreviations

- Air Accidents Investigation Branch (AAIB)
- Air Passenger Duty (APD)
- Air Safety Support International (ASSI)
- Air Services Agreements (ASAs)
- Air Travel Organisers' Licensing (ATOL)
- Airports and Ground Operators Support Scheme (AGOSS)
- Airspace Change Organising Group (ACOG)
- Airspace Modernisation Strategy (AMS)
- Alternative Dispute Resolution (ADR)
- Aviation Recovery Task Force (CART)
- Beyond Visual Line of Sight (BVLOS)
- Bilateral Aviation Safety Agreements (BASAs)
- Carbon Offsetting and Reduction Scheme for International Aviation (CORSlA)
- Civil Aviation Authority (CAA)
- Connected Places Catapult (CPC)
- Department for Business, Energy & Industrial Strategy (BEIS)
- Department for International Trade (DIT)
- Department for Transport (DfT)
- Digital Travel Credentials (DTCs)
- European Civil Aviation Conference (ECAC)
- European Council Regulation (EEC)
- Free Trade Agreements (FTAs)
- Future Aviation Strategy Implementation (FASI)
- General Aviation (GA)
- Global Aviation Security Plan (GASeP)
- Global Travel Taskforce (GTT)
- Gross Value Added (GVA)
- IATA's Worldwide Airport Slot Guidelines (WASG)
- Independent Commission on Civil Aviation Noise (ICCAN)

- International aviation and shipping (IAS)
- International Civil Aviation Organization (ICAO)
- International Transport Forum (ITF)
- Ministry of Defence (MOD)
- Personal Protective Equipment (PPE)
- Private Pilot Licence (PPL)
- Public Service Obligation (PSOs)
- Sustainable aviation fuels (SAF)
- UN Security Council Resolution (UNSCR)
- Union Connectivity Review (UCR)
- Universal Safety Oversight Audit Programme (USOAP)
- Universal Security Audit Programme (USAP)
- Unmanned Aerial Vehicle (UAV)
- Zero Emission Flight (ZEF)



