

**How to compete for a place in the World with a hand tied behind your back:  
The case of air transport services in Girona**

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**Abstract:**

This paper studies the case of Girona-Costa Brava airport, which is an outstanding example of success in increasing airport activity. Passenger traffic has increased by 770% between 2002 and 2007, and it is expected to keep increasing in the near future. The main factor driving this growth has been the expansion of Ryanair operations. We analyze how the conditions provided by the region and the airport facilities have met those factors usually required by low cost companies to expand operation in secondary regional airports. Besides, within a framework of lack of commercial activism by the airport manager, we analyze the commercial and financial policies undertaken by regional and local authorities in order to enhance the attractiveness of the airport, even if these authorities do not share any responsibility for airport management.

**Keywords:** Airports, airlines, low cost companies, tourism.

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## **How to compete for a place in the World with a hand tied behind your back: The case of air transport services in Girona**

### **1. Introduction**

By 2002 the passenger traffic in Girona airport was 557187 passengers. However, in 2007 passenger traffic had reached 4,848,619. Indeed, Girona has experienced an impressive growth of passenger traffic, and passengers in 2007 represent 8.7 seven times the volume of traffic in 2002. Passenger traffic will likely be over 6 million in 2008, according to the intense growth experienced in the first months of this year, since passengers increased by 49.2% in January/February 2008.

All this makes Girona-Costa Brava airport one of the most singular cases of airport growth in recent years in Europe. Potential effects of this traffic growth are important, since Brueckner (2003) and Green (2007) have empirically found that passenger activity is a strong predictor of urban growth, whereas cargo activity is not (Green 2007). Most of trips using Girona airport have a tourist motivation (holidays plus visits to friends and relatives), and the main final destinations are the city of Girona itself, the nearby Seaside area of Costa Brava, and the city of Barcelona, on the hottest tourist spots in South Europe.

The continuously increasing operation of flights by the low cost company Ryanair has been the main driving factor for the growth of Girona airport. Ryanair began flying in Girona on December 2002, and it has carried more than 4.2 million passengers in 2007, absorbing 88% of the total passenger traffic in the airport. In this way, Girona airport has reached a top position among those continentals European airports where Ryanair has established an operational base, together with Marseille, Rome-Ciampino, and Milan-Orio al Serio.

Several works in the literature have studied the factors leading to the expansion of operations by low cost companies in secondary regional airports. Barret (2004a, 2004b) studies and discuss the strategy followed by Ryanair of avoiding large and congested airports, so that the company can enjoy low airport charges, quick turnarounds, rapid check-in facilities, simple terminals and accessibility. On their side, Warnock-Smith and Potter (2005) have identified as additional influential factors for

low cost companies a prospect of high demand for this type of services, convenient slot times, and good aeronautical discounts.

In this paper, we study the case of Girona, extensively document its growth, and analyze the driving factors of this evolution. Concerning factors attracting low cost companies we see how issues related to fees paid and to aeronautical discounts are severely restricted by the extremely rigid management system of Spanish airports, and we show how territorial authorities, which have no responsibilities in the airport management, have developed alternative strategies in order to overcome the rigidities derived from the current management model. A clear message emerges from this analysis: the convenience of decentralizing airport management so that commercial policies oriented to increase the socio-economic impact of the airport on the territory it serves.

The rest of the paper is organized as follows. Next, we briefly review the basic characteristics of Girona region, and after that we extensively document the growth of traffic operation in Girona airport. In section four, we discuss the driving factors for this growth, with special emphasis on the leading role played by Ryanair. In section five the model of management airport in Spain is reviewed in order to show the extreme rigidity that this model imposes concerning the possibility of applying tariff policies and discount policies intended to attract airlines activities. Then we discuss how territorial authorities have applied several alternative tools in order to overcome the airport's manager rigidity concerning commercial policy. Finally, the main conclusions are drawn.

## **2. Girona: The city and its region**

Girona is a mid-size city in the Northeast of the Spanish Peninsula, within the region of Catalonia, with a population of 92,186 in 2007. The city population has experienced an intense growth since 2000, when its population was 73,637 inhabitants. The increase in population in this 2000-2007 period, 25%, is above the increase experienced by the whole province of Girona, and well above the rate of increase in the region of Catalonia in the same period, 15%.<sup>1</sup>

The province of Girona ranks high among the richest provinces in Spain. In 2005, its Gross Domestic Product (GDP) per capita was 24,569 euro, slightly higher

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<sup>1</sup> Data on population obtained from the Catalanian Statistics Institute (IDESCAT).

than the GDP per capita in Catalonia, and 20% higher than the Spanish GDP per capita. Concerning the Gross Disposable Family Income (GDFI), the province of Girona ranks fifth among the Spanish provinces, after Álava, Lleida, Guipúzcoa, and Navarre. Within this context, the city of Girona is relatively rich: its Gross Disposable Family Income (GDFI) is about 25% higher than the GDFI for Catalonia, which, in turn, is well above the Spanish GDFI.<sup>2</sup>

Girona is a city with a variety of characteristics that make it attractive for tourism: commercial activity, sophisticated gastronomy and, specially, a rich historical heritage. The analysis of tourist images in Girona (Galí Espelt and Donaire Benito, 2005) detects a series of structural features of Girona such as its cultural condition, the pre-eminence of the city-monument, etc., that do not change over time. Beyond the city boundaries, there are other areas with high potential attraction for tourism. (a) On the East side (30-50 kilometers, between ½ and ¾ hour road transport) there are a series of seaside tourist destinations in the Costa Brava (e.g. Empuriabrava, Lloret de Mar, Calella, etc.). (b) On the North-West side (50-70 kilometers, ¾ to 1 hour road transport), there are a series of pre-Pyrenees tourist destinations. Finally, (c) around 90 kilometers to the south (little more than 1 hour by road transportation) there is the city of Barcelona, one of the most popular urban tourist destinations in Europe in the recent times.

That foreign tourism activity is extremely high in these areas is well reflected by different types of statistics. For instance, the region of Catalonia (where the main tourist destinations are - by far- Barcelona and Girona) was the final destination for 19.2% of foreign tourists in 2000; there since has increased its share until 25.7% in 2006 (frontur, 2007). Specially illustrative is the fact that the province of Barcelona concentrates 24% of all payments made with foreign VISA and Mastercard credit cars, ranking first in Spain,<sup>3</sup> and the province of Girona ranks fifth, with 9% of payments with Visa and Mastercard (whereas its population represents only 1.56% of total population in Spain). Besides Barcelona, only very important tourist destinations such as the provinces of

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<sup>2</sup> Regional and provincial data on GDP and GDFI obtained from the Spanish Statistics Institute and Regional (*Contabilidad Regional de España*). Data on GDFI for the city of Girona obtained from the Catalanian Statistics Institute (IDESCAT).

<sup>3</sup> It is worth noting that VISA and Mastercard concentrate 75% of total expenditures made by foreigners with credit cards (data gathered by *Barcelona Turisme*).

Madrid (12%), Malaga (10%) and Balearic Islands (10%) have more credit card payment than Girona.

### 3. Air services in Girona airport: an impressive evolution.

Close to the city of Girona, there is the airport of Girona-Costa Brava. The airport is located near to the small town of Vilobí d'Onyar, 12 kilometers south of Girona and some 80 kilometers north of Barcelona. The airport was promoted by the late 1950s by the provincial government of Girona. National and international air transport services in Girona-Costa Brava airport began operating in March 3, 1967. In the decade of the 1970s, the airport experienced an intense growth of air passenger traffic, based on summer charter flights. Since the late 1970s/early 1980s, regular flights were reoriented to Barcelona Airport and tourist charter flights were reoriented to different Mediterranean destinations in Spain. Because of it, after reaching a peak traffic of 830,000 passengers in 1983, traffic figures kept decreasing until the early 2000s. Thereafter, a whole new story for air traffic in Girona-Costa Brava began.

By the beginning of the 2000s, the passenger traffic in Girona airport was barely above 500,000 passengers. However, in the recent years the volume of passengers using the Girona airport has experienced an impressive increase. Table 1 shows the evolution of traffic volumes since 2000.

Table 1. Evolution of traffic (passengers, flights and cargo) in Girona Airport 2000-2007

Girona Airport	2000	2001	2002	2003	2004	2005	2006	2007	Growth 2000-07
Passengers	651,40			1,448,79	2,962,98	3,533,56	3,614,25	4,848,61	
Flights	2	622,410	557,187	6	8	4	4	9	644.3%
Cargo	13,742	13,513	14,907	20,138	28,668	32,126	33,439	45,282	229.5%
	384,43								
	0	173,719	494,361	289,947	142,973	240,696	484,407	234,180	-39.1%

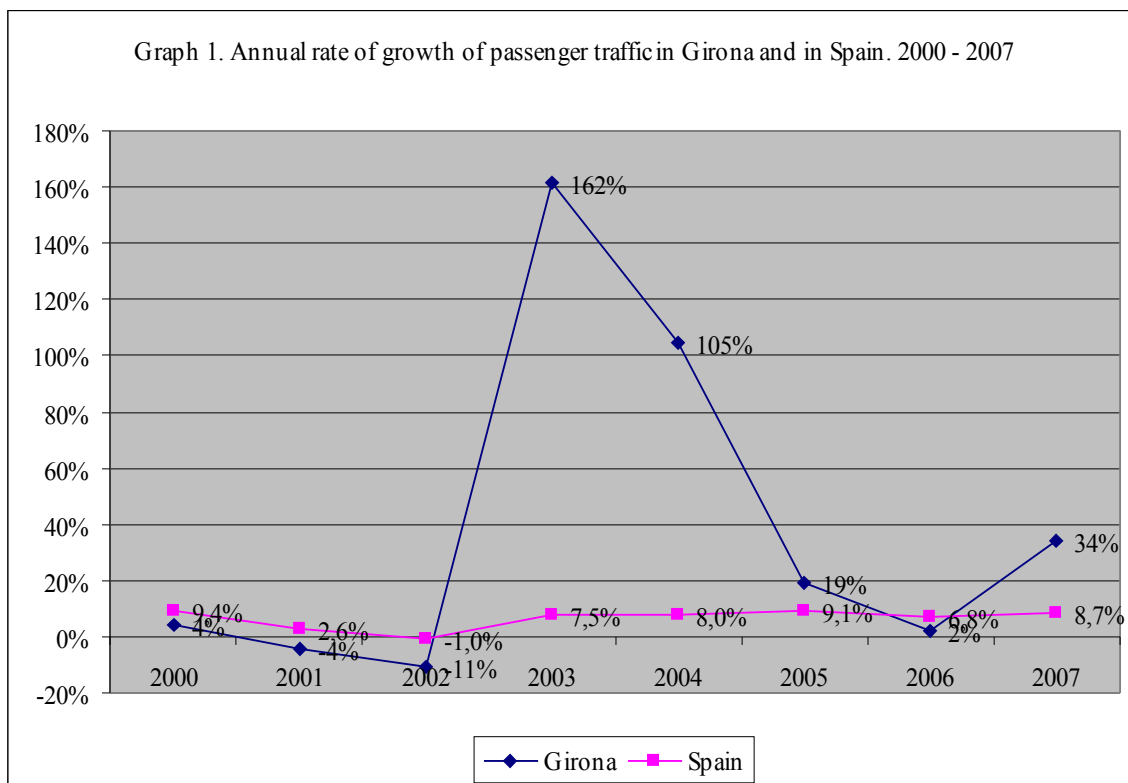
Source: Author's based on data obtained from AENA web page.

Passenger traffic in 2007 is almost 7.5 times that in 2000. With an increase of 644% in the period, Girona is in the top position within the airports with the highest increase in passenger traffic in the current decade. Among those Spanish Airports with relevant amount of traffic in the whole period, only Murcia-San Javier shows a higher growth in 2000-2007, 1,175% (table A-1 in the appendix).<sup>4</sup> Overall, traffic increase in

<sup>4</sup> Among the airports below 200,000 passengers, only the small airport of Leon (161,705 passengers in 2007) shows a slightly higher growth, 662%, in the period. It is worth noting that

Girona airport (644%) is 13 times that experienced in the Spanish airport system (49%) as a whole (see graph 1). As a result, Girona airport has ranked 10<sup>th</sup> in Spain according to passenger traffic, whereas it was only 23<sup>rd</sup> in 2000.

Traffic growth in Girona airport has resulted in a sharp increase in the ratio passenger/flight operation, which increases from 47 passengers per flight in 2000, to 107 passengers per flight in 2007. However, cargo traffic has not followed the same path as passenger traffic did, since it has shown a wide variability in the period analyzed. By 2007, cargo was 39% lower than that in year 2000.



Recent evolution of passenger traffic in Girona airport shows that traffic growth remains a key feature. In January/February 2008 passengers in Girona Airport have been 710,143, which implies a growth of 49.2% with respect to January/February 2007 (475,948 passengers). This rate is the highest one among the Spanish airports, and is more the six times the rate of growth of the whole Spanish system of airports (8.1%).

It is by no means easy to analyze the financial impact that the traffic growth has implied for Girona airport. One of the consequences of the strictly centralized of airport

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this airport began regular flight operations in the late 1990s; hence, its growth is based upon a very small traffic in the earlier years of commercial operations.

management in Spain (explained in section 5, below) is that it allows opaque practices, and one result of this is the lack of publicly known financial data at airport level in Spain. This data was made available by AENA until the late 1990s, but there since this public entity has continuously denied providing financial data at airport level.<sup>5</sup> Interestingly, a leakage of financial data at airport level from AENA happened in 2006, and in this way it has been possible to know financial figures at airport level for 2003 and 2004,<sup>6</sup> and compare them with data publicly released by AENA regarding 1997. This information is shown in table 2.

Table 2. Financial data on Girona airport.

Year	Passengers (thousands)	(1) Total revenues € 1000	(2) Total Costs € 1000	(3) Operational result € 1000	(4) EBITDA € 1000 (3) – amortization
1997	455	2,808	7,199	- 4,392	n.a.
2003	1,449	5,779	8,891	- 3,112	n.a.
2004 (e)	2,963	11,547	9,693	1,854	5,106

Notes: (1) Information for 2004 is estimates done by AENA for the whole year based on actual revenues and costs realized between January and October 2004.

(2) For 1998, it is known that according to AENA data operational result was -3.267 million euros (VyT, 1999, p. 34), but we lack detailed information on total revenues and total costs.

Source: AENA.

As mentioned, financial data after 2004 is not available because of AENA's reluctance to disclose it publicly. However, we can make a rough estimate of results for 2007 based on 2004 financial and traffic data. Work Load Units (WLU-defined as a passenger or 100 kg of freight) in 2004 were 2,964,485. Hence, operational result in 2004 was 0.625 € per WLU, whereas EBITDA in 2004 was 1.722 € per WLU.

Passenger traffic in 2007 was 4,848,619 (63.6% higher than 2004), and cargo was 234,180 kilograms (63.8% higher than in 2004). Hence, Work Load Units in 2007 were 4,850,961. Airport fees have increased not less the CPI in Spain between 2004 and

<sup>5</sup> The reason usually stated by AENA and the Ministry of Transport is that these data does not exist (even if it is well known that it was publicly provided until the late 1990s!!). The issue has raised substantial controversy in Spain, at the academic as well as at the political level. See Bel and Fageda (2007a) for specific documentation on the issue and on the controversies developed because of it.

<sup>6</sup> These data has been widely accepted as AENA financial information and as such has been reproduced (parts of it) in the leading national newspaper *El País* (December 1, 2006), and has been used in works by several scholars such as Tremosa (2006) and Bel and Fageda (2007b).

2007. Hence, the Operational Result in 2007 should be not less than 3.03 € million, and the EBITDA in 2007 should be not less than 8.35 € million. These estimates must be considered as a minimum, since potential scale economies on passenger increase within these traffic ranges have not been considered.<sup>7</sup> Indeed, they show the high potential of generating financial profits that passenger activity growth has developed in Girona airport.

#### 4. Drivers of traffic growth in Girona Airport

The success of Girona airport in increasing its passenger traffic has a clear and outstanding factor: increasing operations by the low cost company Ryanair. This company began its operations in Girona airport in December 2002 (which was too its first operation in Spain), with two flights a day in the route Girona-Frankfurt (Agulló, Rey, Rosselló and Torres, 2007). Since 2003, the first whole year of Ryanair operations in Girona, this company has been the uncontested leader in this airport, as table 3 clearly shows.

Table 3. Leading companies operating in Girona airport. Market shares.

Rank	2000	2001	2002	2003	2004	2005	2006	2007
1 <sup>st</sup>	BA 25%	BA 23%	BA 23%	FR 66%	FR 82%	FR 86%	FR 86%	FR 88%
2 <sup>nd</sup>	JMC 18%	AI 20%	MT 19%	BA 8%	BA 4%	BA 3%	HV 2%	JKK 2%
3 <sup>rd</sup>	AI 16%	JMC 13%	JMC 11%	MT 6%	MT 3%	HV 3%	TOM 2%	HV 2%

Notes: **AI**: Airtours PLC; **BA**: Britannia Airways (rebranded as Thomsonfly.com in 2005); **JMC**: JMC Airlines (rebranded as Thomas Cook Airlines in 2002); **MT**: MyTravel Airways; **FR**: Ryanair; **JKK**: Spanair; **TOM**: Thomsonfly.Com; **HV**: Transavia Holland.

Nowadays, Ryanair operates flights to 54 out of the 61 destinations regularly served from Girona Airport. These destinations include cities in 19 countries of the European Union and the Magreb (see table A-2 in appendix). In addition to Ryanair, Centralwings, Spanair, Transavia France and Transavia Holland serve seven other destinations in the European Union.

<sup>7</sup> Francis, Humphreys and Ison (2004, p. 509) report an ICAO study that found the average unit cost (AUC) for airports less than 300,000 WLU to be US\$ 15, whereas AUC was US 9.4 for airports with 300,00-2,5 million WLU, and US\$ 8 for airports of 2,5-25 millions WLU. On their side, Pels, Nijkamp and Rietveld (2003, p. 358) find from their DEA analysis that the smallest airports on their sample operate under increasing returns to scales.

Ryanair operations in Girona is an extreme case of a more general behavior of this airline in Spain. As a consequence of the intense growth of Ryanair operations in Spain in recent years, particularly since 2003, this airline reached in 2006 the first position in the ranking of low cost companies carrying passengers to Spain (see graph 2, below), replacing in this position Easyjet, that was the leading low cost company until 2005. Overall, only Iberia, the main conventional Spanish airline, carries more passengers to Spain than Ryanair does (IET 2006, 2007).

Table 4 includes all Spanish airports that had relevant passenger traffic in 2000 (more than 100,000 passengers). The left hand of the table shows the airports where Ryanair's market share is over the global share in the Spanish market (5.3% in 2007), whereas the right hand of table 4 includes those airports where Ryanair's market share is below the global share.

Ryanair is the leading airline in five airports (Girona, Reus, Murcia-San Javier, Zaragoza, and Valladolid). In all of them Ryanair's market share is between 40 and 50%, with the exception of Girona, where it controls 88% of the passenger traffic. Ryanair is the second airline in three additional airports (Santander, Granada-Jaén, and Valencia).

Graph 2: Arrivals by Ryanair to airports in Spain (2006)



Source: FRONTUR (2007, p. 10)

Table 4. Spanish airports and Ryanair

Airport	PAX 2007	PAX Ryanair	Ryanair / Total	Growth 2007/200 0	Airport	PAX 2007	PAX Ryanair	Ryanair / Total	Growth 2007/2000
Girona	4,848,619	4,260,702	87.9%	644.3%	Alicante	9,120,819	362,538	4.0%	51.1%
Reus	1,305,894	604,088	46.3%	79.3%	Fuerteventura	4,630,056	120,668	2.6%	33.5%
Murcia-S. Javier	1,995,162	876,120	43.9%	1174.5%	Málaga	13,590,537	345,150	2.5%	43.9%
Zaragoza	512,184	217,342	42.4%	107.6%	Madrid-Barajas	52,143,275	1,136,951	2.2%	58.5%
Santander	761,783	306,879	40.3%	192.1%	Tenerife Norte	4,125,034	88,524	2.1%	71.1%
Valladolid	512,929	204,180	39.8%	147.3%	Palma Mallorca	23,227,983	276,652	1.2%	19.6%
Granada-Jaén	1,467,590	339,401	23.1%	188.1%	Tenerife Sur	8,639,341	52,817	0.6%	-2.4%
Valencia	5,929,916	919,649	15.5%	162.2%	Barcelona	32,800,570	0	0.0%	65.6%
Jerez	1,607,834	224,326	14.0%	127.8%	Gran Canaria	10,354,858	0	0.0%	10.4%
Santiago	2,050,121	246,499	12.0%	53.8%	Lanzarote	5,625,580	0	0.0%	12.5%
Almería	1,206,634	109,957	9.1%	32.0%	Eivissa	4,765,121	0	0.0%	6.5%
Sevilla	4,507,142	385,271	8.5%	113.0%	Bilbao	4,277,610	0	0.0%	67.3%
Average Growth				251.84%	Menoría	2,776,610	0	0.0%	0.2%
Standard Dev.				330.94%	Asturias	1,560,830	0	0.0%	90.9%
					Vigo	1,405,968	0	0.0%	94.8%
					A Coruña	1,266,804	0	0.0%	115.1%
					La Palma	1,207,572	0	0.0%	34.7%
					Pamplona	498,473	0	0.0%	44.4%
					San Sebastián	466,494	0	0.0%	64.4%
					Melilla	338,650	0	0.0%	28.4%
					El Hierro	184,762	0	0.0%	50.2%
					Vitoria	173,877	0	0.0%	39.2%
					Average Growth				45.4%
					Standard Dev.				31.6%
<b>T-statistic for difference of average growth</b>				<b>7.48</b>					

Source: Author's based on info in AENA web page.

Those airports in which Ryanair is more active in gaining a high market share tend to be the airports where passenger traffic experiences highest rates of growth overall. The difference in average airport growth between the two columns is high, 251.84% against 45.4%, and it is significant at the 1% level (t-statistic = 7.48)

As mentioned, the case of Girona is extreme in Spain. It is not only that Ryanair concentrates 88% of the traffic in Girona, and that traffic growth has heavily increased in this airport in the recent years. In addition, the 4,260,702 passengers carried by Ryanair in Girona airport in 2007 represent 38.46% of all passengers carried by Ryanair

in Spain in 2007 (11,077,714). All these factors taken together can be explained by an additional feature of Girona airport: Besides being close to a city with strong appeal for tourism (Girona) and to a local area with heavy touristic activity (Costa Brava), Girona airport is located around one hour of road transport from Barcelona, the most important city in Spain concerning tourism, as well as a hot spot among the touristic cities in the South of Europe. This fact is of remarkable relevance, if we consider that more than 85% of trips in Girona airport in Summer 2005 had a tourism related motivation -71.7% holidays and 13.7% visiting family and friends-<sup>8</sup> (Martínez et al, 2005, p. 18).

Indeed, the percentage of foreign travelers whose final destination is Barcelona is very high, as shown by several surveys that have studied the characteristics of Girona airport users in the past years. In this way, Martínez et al. (2004, p. 22 ) found that 26.7% of international visitors using this airport in the high season (Summer) 2004 had Barcelona city as final destination, and an additional 8.7% had a different point within the province of Barcelona as final destination. Similar percentages have been found for the high season (summer) 2005 season: 26.8% going to Barcelona city and 10.9% to other destinations within the province of Barcelona (Martínez et al, 2005, p. 26).

If we look at low season (out of summer) trips, the share of Barcelona city as final destination is even higher: 42.8% of total passengers in 2004 and 41.1% in 2005. Overall, destinations within the province of Barcelona account for more than 50% of foreign travellers in low season trips in 2004 and 2005 (Martínez et al., 2005, p. 81).

All in all, the factors driving the growth of traffic in Girona airport can be summarized as follows: the airport serves a medium-size city (Girona) rich in cultural and historical features, which is close to a sea-side area (Costa Brava) that has a long history as Sun-tourism destination. In addition to that, Girona airport provides an easy and convenient access to the metropolitan area of Barcelona, which a large fraction of passengers takes as final destination. Small traffic in Girona airport at the beginning of the 2000s provided enough free capacity for expansion of flight activities. Turnaround time in Girona-Costa Brava is extremely low, 25 minutes, among the lowest in Europe, and well below the 40 minutes standard turnaround time planned by AENA for 738-800 planes, the type of plane operated by Ryanair. In addition to this, airport parking prices at Girona airport are less than half of those applied in Barcelona airport in all time

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<sup>8</sup> As in Papatheodorou and Lei (2006), we consider as tourist travel that done for holidays as well as for visiting friends and relatives.

intervals, with the exception of the first 30 minutes, fraction in which Girona price is one-third of Barcelona price.

These factors have been influential in the decision by Ryanair to establish a base in Girona. In this way, this company has channeled through this airport a large volume of traffic. This is consistent with the usual strategy followed by Ryanair of avoiding large and congested airports, so that the company can enjoy quick turnarounds, rapid check-in facilities, simple terminals, and good accessibility and lower parking charges (Barret, 2004a, 2004b) and high demand for low cost companies services and convenient slot times (Warnock-Smith and Potter, 2005).

However, there are other important factors in attracting low cost-carriers with strategies like that followed by Ryanair, such as low airport charges (Barrett 2004a) and good aeronautical discounts (Warnock-Smith and Potter 2006) that are not so easily meet in the case of Girona Airport. Hence, this point deserves more detailed attention.

##### **5. A hand tied behind the back: The airport management model in Spain**

European airports that belong to large national airport markets are usually managed on individual basis.<sup>9</sup> This is the case for Germany, France, Italy<sup>10</sup> and the United Kingdom (as well as for other large Anglo-Saxon countries such as the USA, Canada and Australia). Individual management is also the case for the Netherlands, Ireland, Denmark, Belgium and Austria. Indeed, in all these countries grants and subsidies to small airports and/or airports located in poor regions are often available from more than one government level, or implemented through a transparent cross-subsidy scheme.

Where a national airport system is run in a centralized way, it has just one large airport. Such a situation exists in a few countries such as Portugal, Finland and some of the small new European Union countries such as Slovakia, Leetonia, Lithuania, and Estonia. Spain is unique, because it is the only European country with several large

<sup>9</sup> An in deep analysis of the management models in EU and other Anglo-Saxon countries can be found in Bel and Fageda (2006, 2007).

<sup>10</sup> It is worth noticing that airports serving the same metropolitan area are sometimes managed as a group. For example, in Italy that is the case of Milan (Malpensa and Linate), managed by SEA, where the main shareholder is the city of Milan holding 84,56% of the capital, followed by ASAM -Milan Province- (14,6%), and other minor public and private investors (0.9%). The same happens in Rome (Fiumicino and Ciampino), managed by Aeroporti di Roma - ADR S.p.A, where the main shareholder is the private company Gemina SPA (95.8%), local entities hold 3%, and other minor investors hold 1.2%. Other significant example is that of Paris– Charles de Gaulle, Orly and Le Bourget-, managed by Aéroports de Paris (ADP), where the French State holds 68.4%, and minor private investors hold the rest of the shares. ADP is listed in the Paris Stock Exchange since 2006.

cities and airports, and with a large air market, in which all airports are managed by a single national agency.

*Aeropuertos Españoles y Navegación Aérea* (AENA), a public agency belonging to the Ministry of Transportation (*Ministerio de Fomento*), manages in an integrated way the 48 airports that channel commercial traffic in Spain in 2008.<sup>11</sup> Besides, AENA is the owner of all airport facilities. AENA and the Ministry of Transportation control all relevant decisions related to airport activity in Spain: investment plans, slots allocation and coordination –depending on the case-, and formal and executive negotiations with airlines.

The Ministry of Transportation makes the decisions on investment, since it is entitled with planning responsibilities regarding infrastructures. AENA elaborates the technical proposals, and implements the corresponding building activity and operation. The Ministry of Transportation takes the decisions regarding allocation of available slots, within the framework established by the Decree (EEC) N. 95/93 and by the International Air Transport Association (IATA) coordination procedures.

Given the characteristics of airport management in Spain, there does not exist the possibility of a differentiated commercial policy by any airport in the system. In the same way, the economic resources generated by airport activity are managed through the ‘single box’ principle. The ‘single box’ principle implies the existence of a cross-subsidy system between the Spanish airports that is neither transparent nor efficient, and is not guided by solidarity in practice (Bel and Fageda, 2008).

On the other side, airport fees for using airport facilities are established by law by the Spanish Parliament, and are set for three different categories of airports, (theoretically) according to the volume of traffic each one the airports absorbs. In this way, (1) the differentiation between the three categories is arbitrary as does not follow from cost considerations, and (2) there is not the possibility of differentiating airport fees between airports within the same category.

Table 5 displays the three categories used to establish the landing fees for the Spanish airports. These categories have almost the same composition regarding the ‘approaching fee’ (air traffic control), as indicated in note 1 to table 5. If we compare the classification with traffic volumes in year 2000 (see table 2 above), we can see that

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<sup>11</sup> Besides managing the Spanish airports, AENA is in charge too of managing air traffic control. This is unique, since both functions are separated in all other airport systems.

each category almost perfectly reflects traffic volumes thresholds in that year. However, this management system is rigid, and by the year 2007 there exist noticeable dysfunctions. For instance, Girona airport is the 10<sup>th</sup> airport regarding traffic volume in Spain. Hence, its traffic is higher than that of five airports in first category (Eivissa, Fuerteventura, Seville, Bilbao, and Menorca) and higher too than that of all airports in second category. However, Girona is classified second category in high (summer) season and third category in low (out of summer) season. To a lesser extend, similar dysfunctions happen with respect to Reus and Murcia-San Javier.

Table 5. Airport classification regarding the landing fee, 2008

Airports with commercial traffic	Traffic thresholds (million passengers 2007)
<i>First category:</i> Alicante, Barcelona, Bilbao, Fuerteventura, Gran Canaria, Lanzarote, Madrid Barajas, Málaga, Palma de Mallorca, Seville, Tenerife North Tenerife South, Valencia <i>Eivissa and Menorca between May 1 and October 31</i>	Maximum (Madrid-Barajas): 52,143,275  Minimum (Menorca): 2,776,610
<i>Second category:</i> Almería, Asturias, Granada-Jaén, Jerez, La Coruña, La Palma, Santiago, Vigo. <i>Eivissa and Menorca between November 1 and April 30</i> <i>Girona and Reus between May 1 and October 31</i>	Maximum (Girona): 4,848,619  Minimum (La Palma): 1,207,572
<i>Third category:</i> Albacete, Badajoz, Burgos, Ceuta, Córdoba, El Hierro, La Gomera, La Rioja-Logroño, León, Madrid-Cuatro Vientos, Melilla, Huesca-Pirineos, Murcia, Pamplona, Sabadell, Salamanca, San Sebastián, Santander, Son Bonet, Torrejón, Valladolid, Vitoria, Zaragoza. <i>Girona and Reus between November 1 and April 30</i>	Maximum (Girona): 4,848,619  Minimum (several): 0

Note: 1) The classification of airports regarding the ‘approaching fee’ (air traffic control) is basically the same, with the exception that Eivissa and Menorca are in the first category throughout all the year, and Girona and Reus are in the second category throughout all the year.

2) Other minor fees (i.e. ‘security fee’) do not distinguish between airports, and some discounts are applied to airports outside the Peninsula (Canary and Balearic Islands, and Melilla).

Source: Author’s based on AENA web page for passengers and AENA (2008) for fees.

Table 6 displays landing fees, distinguishing between fees applied to flight routes (1) when origin, scale or destination airports are within the European Economic Space, or (2) when origin, scale or destination airports are outside the European Economic Space.

Table 6. Landing fees 2008. Euros for Tm (weight), or fraction.

	European Economic Space	Outside European Economic Space
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Airport	Weight thresholds (Tm)			Weight thresholds (Tm)		
	< 10 Tm	10 to 100 Tm	> 100 Tm	< 10 Tm	10 to 100 Tm	> 100 Tm
1st category	5.231468	5.995883	6.724466	6.65280 3	7.620265	8.551895
2 <sup>nd</sup> category	4.705933	5.386739	6.055604	5.98394 0	6.855850	7.691929
3rd category	3.917629	4.490939	5.052308	4.98064 3	5.709227	6.413922

Note: Fees for domestic regular flights from the Iberia Peninsula to Canary Islands, Balearic Islands and Melilla enjoy discounts in the range of 15-20%. Discounts are much larger for regular inter-islands flights within each one of both archipelagoes (Canary Islands and Balearic Islands); in this case, the discounts applied are around 70%.

Source: Author's, based on info in AENA (2008)

All in all, the management system of Spanish airports imposes rigid fee schemes, that do not properly reflect costs and, more important, do not allow for price differentiation between airports. Fees are established by the Spanish Parliament, and are applied to each airport according to the category where it is classified, without regard to other commercial considerations. The unique exception to this general procedure is those specific fees for several types of flight in out- of-peninsula airports, intended to compensate for isolation costs.

There is not such a thing as an autonomous management of the Spanish airports, so that no specific commercial or pricing policy can be applied. Indeed, this is contradictory with the usual strategy followed by Ryanair to operate flights in secondary airports, and specially to establish important operational bases, as it is the case of Girona.

## **6. The other (free) hand doing as much as possible: Local institutions and airline friendly policies.**

Even if they do not share any responsibility for airport management, local and regional authorities in Girona have been extremely active in promoting airline friendly policies concerning the financial conditions for operating in Girona-Costa Brava airport. Ryanair began its operations in Girona by December 2002, and soon after that, in March 1 2003, an agreement with the airline was signed by *Girona Centre Logistic* (a public firm co-owned by the regional government of Barcelona –*Generalitat de Catalunya*-, the province government of Girona –*Diputació de Girona*-, and the Girona Chamber of Commerce). This agreement established direct payments to Ryanair as compensation for the launching of six flights in five routes (Frankfurt Hahn -2-, London Stansted,

Paris-Beauvais, Milan-Orio al Serio, and Glasgow-Prestwick). The agreement was set for two years (plus two years as possible extension).

But soon the actual evolution of the air market made the agreement obsolete. On one side, before Summer 2003 Ryanair was already operating 12 flights; on the other side, there were concerns that direct compensations to Ryanair could raise problems according to EU competition laws. It is worth noting that it was already underway the inquiry on the 2001 agreements between the Wallon region (owner of Charleroi airport) and Ryanair offering special conditions to this airline for the using of the airport.<sup>12</sup>

Beacuse of this, by summer 2003 new negotiations were launched by the Generalitat de Catalunya and Diputació de Barcelona with Ryanair in order to promote the establishment of Ryanair's base in the South of Europe and to change the formal structure of the agreement. By late 2003 a new agreement was reached, and its implementation began by April 2004. Ryanair based three planes at Girona airport, and monthly payments for commercial and marketing services by Ryanair were established for different types of service:

- a) Branding of the planes based in Girona, promoting *Girona-Costa Brava* tourist brand.
- b) Marketing of *Girona-Costa Brava* tourist brand in the commercial online actions taken by Ryanair and directed to its customers.
- c) Marketing of *Girona-Costa Brava* tourist brand in Ryanair main web page, as well in most of its destinations web pages.
- d) Additional non-regular marketing actions, such as including reports on *Girona-Costa Brava* in Ryanair magazine.

A new public entity was created in 2004 to sign and implement this agreement: The *Associació per al Desenvolupament Turístic de les Comarques Gironines* (ADTCG, Association for Tourist Development of Girona), owned by the Generalitat de Catalunya, Diputació de Girona and the Girona Chamber of Commerce. In the following years negotiations were launched to induce private capital to fund the agreement and in 2006/2007 private firms began participating in the collaboration. In

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<sup>12</sup> By February 2004 the commission declared the reduction of landing and handling fees to Ryanair incompatible with EU regulations, because they were provided only to one company, but were not provided on equal basis to its competitors (Martí-Henneberg et al, 2007). Barbot (2006) provides an excellent assessment of Ryanair-Charleroi Airport agreement.

the meanwhile, a new agreement with Ryanair was reached to increase the number of planes based in Girona, from three to nine. These six additional planes were based in Girona through 2007.

On April 1 2007, ADTCG was converted into a new Limited Company of commercial character, *Gestió de Marketing i Serveis de les Comarques Gironines* (GMSCG-Management of Marketing and Services of Girona). For 2008 the budget of this Company plans to spend 4.67 million euros (plus 16% VAT) buying marketing services to airlines operating in Girona. There have been established two different bussiness lines:

1. The first one is intended to buy services to those companies that have based planes in Girona (as of now, Ryanair with nine, and Spanair with one). 3.5 millions euros (75%) are allocated to this line.
2. The second one is intended to buy marketing services to those companies that operate flights all over the year (thus promoting low season operations). The companies that benefit as of now from this bussiness line are Ryanair, Spanair, Transavia Holland, and Transavia France.

*Gestió de Marketing i Serveis de les Comarques Gironines* (GMSCG) re-sales those marketing services to public entities (such as *Catalunya Turisme* and *Patronat Turisme Costa Brava*) as well as to private firms (such as *Barcelona Bus* –a leading interurban bus services provider-, and *Areas* –a firm that manages restaurant and catering services-). For 2008, it is expected that re-selling to public entities will provide 52.7% of GMSCG revenues, whereas re-selling to private firms will provide 43.3% of total revenues.

Final mention must be made to the fact that on April 2 2008, GMSCG and Ryanair have reached a new agreement that will be implemented begining in 2009. Ryanair has committed to increase until 14 its planes based in Girona (that is, adding five new planes: two in 2009 and three in 2010). Between 2009 and 2011, the investment done by local partners will be 13.9 million euros. Of them, 23.8% will be paid by the regional government of Catalonia, 18.7% by the province government of Girona, 8% by Catalonia Tourism, and 1.94% by the Chamber of Commerce. The remaining 47.55% will be contributed by private firms. The marketing expenditures

committed by GMSCG have decreased on a *per based plane* basis, thus reflecting benefits from scales economies in the collaboration. Furthermore, a non-exclusivity specific clause has been introduced in the agreement, by which both parties expressly recognize that the agreement must be extended to any other company that meet the same conditions –specially, basing planes in Girona-.

The five year old story of promotion actions undertaken by local and regional authorities in Girona reflect the will to meet those financial factors required by low cost carriers to enhance their operations and, furthermore, to establish operational bases in secondary regional airports such as Girona. Care has been take to accommodate with the commercial and financial practices developed to European Union legislation concerning competition, thus avoiding discriminatory practices that could distort competition between carriers.<sup>13</sup> In addition to this, local and regional authorities try to stimulate operations by airlines other than Ryanair. They are aware that Ryanair dominant position, even if it has been the opportunity window that Girona has found to compete for a place in the World, poses some risks for the future that can be reduced by promoting airline diversification.<sup>14</sup>

All these practices have replaced the lack of commercial activism by the airport manager AENA.<sup>15</sup> An active airport manager could have easily applied general and non-discriminatory fees reductions or discounts. Recall that the 4.7 million euros that GMSCG plans to spend for marketing and commercialization services in 2008 is below

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<sup>13</sup> Community guidelines on start-up aid to airlines departing from regional airports can be found in the Official Journal of the European Union, Communication from the Commission 2005/C 312/01 (December 9, 2005)

<sup>14</sup> Another risk usually mentioned when considering the expansion of low cost companies in secondary regional airports, the possibility that flight services connecting with large hubs decrease (Francis, Humphreys and Ison 2006, small Eastern European airport case), does not hold in the case of Girona. Actually, Girona did not have regular connections to large hub airports before Ryanair began operating in 2002. Nowadays, however, Spanair operates eight flights a day (four in each direction) between Girona and Madrid-Barajas. In addition, Ryanair provides now connectivity with other airports with relevant long distance flight offer, such as Manchester and Dublin.

<sup>15</sup> The airport manager is not only passive concerning commercial policy, but also lacks responsiveness and does not dynamically adjust to the requirements of infrastructure. A clear example is provided by the fact that the Investment Director Plan for Girona Aiport, approved in 2006 (Spanish Official Bulletin of August 9 2006) forecasted the need of 18 platforms for airport parking in 2020. This implies creating one additional platform, since there existed already 17 when the plan was approved. However, recent developments imply that 16 planes will be based in Girona by 2010 (15 Ryanair -14 operational and one back-up plane-, and one Spanair). Indeed, Girona will need more than 18 platforms by 2020, but this issue has not been even acknowledged as of now.

the EBITDA generated by the airport in 2004, and much lower than the EBITDA we have estimated (minimum estimation) for 2007. On the other side, it is worth noticing too that the Operational result estimated for Girona airport in 2007 is higher than the marketing services finally funded by public entities (less than 2.5 million euros). Clearly enough, there has been financial room for the airport manager to apply pricing policies to attract activity. In absence of this type of managerial approach by the airport manager, local authorities have needed to incur in relevant transaction costs in order to achieve the objective of promoting activity in Girona airport.

The agreements between regional and local authorities and Ryanair concerning Girona airport have provided an example for other local and regional authorities in Spain that try to attract more operations by Ryanair. In this way, several institutions in Catalonia (Generalitat de Catalunya, Diputació de Tarragona, city government of Reus and the Reus Chamber of Commerce) have signed an agreement with Ryanair by early February 2008. Ryanair commits to base four or five planes in Reus, beginning October 2008, thus notably increasing its operations.<sup>16</sup> The counterpart has agreed to pay to Ryanair 2.7 million euros per year, for publicity and marketing (payments would begin in 1 million euro in 2008, and reach 2.7 million in 2010, when the agreement is fully developed). More recently, on March 27, 2008, the regional government of Cantabria and Ryanair have signed an agreement to promote Ryanair operations in Santander airport. According to this agreement, the government will pay Ryanair 16.2 million euros during a period of five years (2.8 million in 2008 and 3.4 million per year in 2009-2012).<sup>17</sup>

A clear implication follows from our analysis: increasing managerial flexibility through decentralization would enhance the possibilities of promoting the airport activity and, thus, fostering territorial interests, social as well as economic. It is worth noting that our analysis is limited to the centralized-individual dimension of the choice on management model. Instead, our analysis does not allow for any implication on the public-private dimension of the choice on the concrete management tool.

## **7. Conclusion**

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<sup>16</sup> Generalitat de Catalunya & Diputació de Tarragona, Press note, February 12, 2008.

<sup>17</sup> *El Economista*, March 27, 2008, online versión, <http://www.eleconomista.es/empresas-finanzas/noticias/438662/03/08/Cantabria-aporta-162-millones-para-el-acuerdo-con-Ryanair-de-2008-al-2012.html>

The case of Girona-Costa Brava airport is an outstanding example of success in increasing airport activity. Passenger traffic has increased by 644% between 2000 and 2007, and it is expected to keep increasing in the near future. The main factor driving this growth has been the expansion of Ryanair operations. On one side, with a continuous expansion of the number of routes and flights operated; on the other hand, with the establishment of an important base in Girona.

Some of the factors that have stimulated this expansion must be remarked: high potential demand for low cost services, given the easy access to important tourist areas (Costa Brava and Barcelona), quick turnaround, good accessibility to the airport, low parking prices, etc. However, the absence of an active commercial policy by the airport manager imposed limitations on one core factor to maximize the attraction of low cost activity: proper policies on fees and discounts.

Local and regional authorities in Girona, even if not responsible at all for airport management, have replaced the airport manager in order to develop an active commercial policy. This policy has been very dynamic and flexible, thus achieving outstanding results. However, it has implied relevant transaction costs and lack of coordination with the airport manager. All these aspects could be further improved by reforming the management model and decentralizing managerial responsibilities. In this way, local/regional interests could do what they have actually done, but playing with both hands instead of having one hand tied to the back. This would likely avoid incurring in high transaction costs, and would further improve the effectiveness of the commercial policies undertaken. Nonetheless, as the case of Girona shows, local and regional authorities can conduct an effective promotion policy even when one hand is tied behind the back.

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## Appendix

Table A-1. Passenger traffic 2000-2007 in Spanish airports

	2000	2007	Growth 07/00
Murcia-San Javier	156,542	1,995,162	1174.5%
León	21,218	161,705	662.1%
Girona	651,402	4,848,619	644.3%
Santander	260,767	761,783	192.1%
Badajoz	31,522	91,789	191.2%
Granada-Jaén	509,442	1,467,590	188.1%
Valencia	2,261,943	5,929,916	162.2%
La Gomera	15,501	40,569	161.7%
Valladolid	207,384	512,929	147.3%
Jerez	705,710	1,607,834	127.8%
A Coruña	589,000	1,266,804	115.1%
Sevilla	2,116,035	4,507,142	113.0%
Zaragoza	246,720	512,184	107.6%
Vigo	721,608	1,405,968	94.8%
Asturias	817,497	1,560,830	90.9%
Reus	728,221	1,305,894	79.3%
Tenerife Norte	2,411,100	4,125,034	71.1%
Bilbao	2,556,373	4,277,610	67.3%
Barcelona	19,809,540	32,800,570	65.6%
San Sebastián	283,830	466,494	64.4%
Salamanca	41,136	65,216	58.5%
Madrid-Barajas	32,893,997	52,143,275	58.5%
Santiago	1,332,893	2,050,121	53.8%
Córdoba	14,755	22,429	52.0%
Alicante	6,038,266	9,120,819	51.1%
El Hierro	123,021	184,762	50.2%
Pamplona	345,291	498,473	44.4%
Málaga	9,443,867	13,590,537	43.9%
Madrid-Torrejón	24,271	34,058	40.3%
Vitoria	124,941	173,877	39.2%
La Palma	896,364	1,207,572	34.7%
Fuerteventura	3,467,614	4,630,056	33.5%
Almería	914,312	1,206,634	32.0%
Melilla	263,751	338,650	28.4%
Palma de Mallorca	19,424,243	23,227,983	19.6%
Lanzarote	5,002,551	5,625,580	12.5%
Gran Canaria	9,376,640	10,354,858	10.4%
Eivissa	4,475,708	4,765,121	6.5%
Menorca	2,772,337	2,776,610	0.2%
Tenerife Sur	8,849,129	8,639,341	-2.4%
Other (7)	65,179	101,772	56.1%
-Total	140,991,621	210,404,170	49.2%

Note: Other commercial airports with no commercial traffic at the beginning (2000) or at the end of the period were Albacete, Ceuta, Huesca, Logroño, Madrid-4Vientos, Sabadell, and Son Bonet. They have been included together in the table (last row, other). None of them reached 25,000 passengers in 2007.

Source: Author's, based on AENA data.

Table A-2: Destinations served (regular flights) from Girona Airport – April 2008.

Airline	Country	Airport
Ryanair	Austria	Graz, Linz
	Belgium	Brussels/Charleroi
	Denmark	Aarhus/Tirstrup, Billund
	Chec Republic	Brno/Turany
	Eslovaquia	Bratislava
	France	Paris/Beauvais-Tille
	Germany	Altenburg/Nobitz, Bremen, Frankfurt/Hahn, Hamburg/Luebeck, Karlsruhe/Baden-Baden, Niederrhein
	Ireland	Dublin, Shannon
	Italy	Alghero/Fertilia, Cagliari, Firenze/Galilei, Forli, Milan/Orio al Serio, Pescara, Pisa/Firenze, Roma/Ciampino, Trapani/Sicilia, Venecia/Treviso
	Malta	Malta
	Morocco	Fez/Sais, Marrakech
	Netherlands	Eindhoven, Maastricht
	Norway	Oslo/Sandefjord
	Poland	Poznań, Wroclaw
	Portugal	Porto
	Spain	Fuerteventura, Granada/Jaén, Tenerife Sur
Sweden	Goteborg/Save, Stockholm/Skavsta	
Switzerland	Basel-Mulhouse	
United Kingdom	Birmingham, Blackpool, Bournemouth, Bristol, Doncaster, Glasgow/Prestwick, Liverpool, London/Luton, London/Stansted, Manchester, Newcastle, Newquay/St.Mawgan, Nottingham/East Midlands	
Centralwings	France	Lille/Lesquin
	Poland	Gdansk/Rebiechowo, Krakow,
Spanair	Spain	Madrid-Barajas, Palma de Mallorca
Transavia France	France	Paris Orly
Transavia Holland	Netherlands	Róterdam

Note: Wizz Air serves Budapest, Gdansk and Katowice/Krakow in Summer Session.

Source: Auhor's