INTERVIEW

Carolyn McCall, CEO, easyJet

MUNICH AIRPORT

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For more information please contact:
Irfan Khan, Commercial Development Manager UK & Ireland
Omni Serv Limited, Abbey House 450 Bath Road Longford
Heathrow Middlesex UB7 0EB
Mob: +44 (0) 7958877114 | Tel: +44 (0) 208 757 8843 | Fax:+44 (0) 208 757 8767
Email: ikhan@airservcorp.com | Web: www.airservcorp.com
Airports in the News
A snapshot of stories from around Europe

Carolyn McCall, CEO, easyJet
Primary airports provide easyJet platform for future expansion

ACI EUROPE Annual Assembly, Congress and Exhibition
New economic and operational realities

European Investment Bank
Airports seek priority in revised EIB transport lending policy

ACI EUROPE Economics Report 2010
2010 Economics Report Holds a Mirror to the Industry
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Fly to Prague
Welcome to the new look ‘Airport Business’. I hope you like the updated design and the new features we have introduced. You may also recognise that this editorial’s headline is our new motto, launched with our brand new ACI EUROPE website recently.

The spirit of renewal isn’t limited to our offices. Since the beginning of the year, the recovery of air traffic in Europe has gained further pace. Passenger traffic grew by +9% between January and July, on the back of airlines finally adding more capacity. Of course, that number is inflated by the impact of the 2010 volcanic ash crisis. But even adjusted to ‘business as usual’ conditions, passenger traffic still grew at +4.8%. While that figure is a far cry from the dynamics of aviation markets in Asia and Latin America, it still means that passenger traffic in Europe nearly tripled GDP growth. This reflects the firm resilience of aviation and also points to the unique role of airports as engines of economic development.

Looking ahead, that role will only gain further importance. The global shift in the world economy means that Europe will increasingly become dependent on trade with the new economic powerhouses of Asia and Latin America. In the coming years, BRIC countries (Brazil, Russia, India and China) and Latin America are the new set of up-and-coming markets, with similar prospects for buoyant economic growth and aspiring first-time fliers.

Efficient air connections with these countries will therefore be essential for Europe to forge new business relations, increase its exports and attract foreign investment. In other words, aviation will be a key enabler for Europe to secure its global relevance in a multipolar world. As a result, the European aviation market equally needs to secure its own relevance in the face of new aviation powers with global ambitions.

Achieving this depends on two prerequisites: further opening the skies and developing our infrastructure.

In liberalising its own aviation market, Europe did wonders for our industry. We need to build on this achievement. We must now open the skies beyond our borders – with all of Europe’s main trading partners, as well as with its neighbouring countries across the Mediterranean and to the East. This is instrumental in attracting and developing air traffic flows with these fast developing markets. It is also the only way to effectively protect the position of Europe as a global aviation hub.

We at ACI EUROPE have taken the lead in promoting such an ambitious agenda at EU level. This is not necessarily to the liking of some European airlines. But as stated by our President at our Annual Congress in Lisbon last June: they need to wake up and embrace the new reality! Resistance would only result in retrenchment and slow decline.

Developing aviation infrastructure is the other part of the equation. Europe is on track to address congestion in the sky. The Single European Sky project and SESAR are moving in the right direction, benefitting from strong EU leadership and significant resources. ACI EUROPE is directly involved in many ways, with latest efforts including a comprehensive agreement to assist the SESAR JU.

But what about congestion on the ground? EU leadership and resources seem to be transferred on the sky – forgetting that every flight begins at the airport. This is extremely worrying. For the last 5 years, we have repeatedly warned about the looming airport capacity crunch. In the meantime, emerging countries are capitalising on airport infrastructure to support their ambitions to build tomorrow’s leading economies. By 2020, China alone will have built 78 new airports.

Optimising existing airport capacity is a must, but it is far from enough. None of the ambitious objectives of the Single European Sky in terms of ATM capacity, environmental efficiency and economic benefits will materialise if Europe does not build more airport capacity. In the UK alone, the cost of missed trade opportunities resulting from the lack of airport capacity around London-Heathrow stands at £14 billion over the next 10 years. With EUROCONTROL predicting that by 2030 close to 20 major European airports could experience congestion levels similar to Heathrow today, the issue is clearly of European relevance.

In the coming weeks, the European Commission will adopt its ‘Airport Package’. This wide ranging policy initiative will include a review of EU rules governing ground handling, aviation noise and airport slots. It will also look at setting an EU policy for airport capacity. This is THE opportunity for the Commission to set the record straight on airport capacity. And there is a lot more riding on it, than the mere business interests of airports.
**AIRPORTS IN THE NEWS**

**Amsterdam Airport Schiphol**
Schiphol continues to push the boundaries in the name of passenger facilitation, opening a 20,000 square foot, free-to-enter, ‘mixed reality’ park, with plants and trees, an outdoor section and images and sounds projected out to passengers on 10 May 2011.

**Shannon Airport**
A small regional airport facing seriously challenging trading conditions. Shannon has embarked on the first steps of an ambitious plan to become a global cargo hub on the edge of Europe.

**Aéroports de Paris**
AdP announced its intentions to expand its business in the near future, identifying Brazilian tenders to manage & modernise congested airport during the forthcoming 2014 World Cup and 2016 Olympic Games as tempting targets. Europe, Russia, India and China are also being considered.

**Munich Airport**
On 26 July Munich Airport won planning permission for a third runway, to address the capacity bottleneck which has already begun to arise within operations. The move comes as Munich is also investing €63m in baggage systems to expand terminal capacity.

**Aena Aeropuertos**
Spain joins in the move towards the privatisation of airports as commercial businesses, with its government approving the sale of 49% of Aena Aeropuertos, and the offering of management contracts for Madrid-Barajas & Barcelona.

**SEA Milan Airports**
SEA, the operator of Milan’s two international airports, announced its intention to launch an initial public offering on the Milan stock exchange, although this may be postponed, with rumours of investment firm interest in buying the company.

**ACI EUROPE Best Airport Award winners** – Bournemouth Airport, Edinburgh Airport, ICF Antalya, Amsterdam Airport Schiphol, Zurich Airport
Helsinki Airport
Helsinki Airport is trialing electronic cards which are provided to transferring passengers to guide them through the transfer process. The cards stream personal live flight info, such as departure times and walking times to the gate, as well as information about services such as shops, cafes, etc.

Warsaw Chopin Airport
Warsaw Airport is advancing with its own ‘Chopin Airport City’ concept, which is at the preliminary stages of planning. Work has already begun on a 5-star hotel on campus, set to open in mid-2013.

London Heathrow Airport
On 20 September 2011 Heathrow Airport introduced driverless pods to ferry passengers, replacing 50,000 bus journeys annually with zero-emissions, on-demand trips. As well as benefitting the environment, the initiative also saves each passenger 10 minutes journey time.

Budapest Airport
Budapest Airport has had a busy number of months, with a lot of activity centered on expansion. As well as its ‘SkyCourt’ facility opened earlier this year, Budapest Airport is working on a range of medium-term initiatives, including its Cargo City plans and the building of a €25m 200-room hotel.

Athens International Airport
Athens International Airport opened a €20m Photovoltaic Park on 29 September. The largest installation of its kind in an airport worldwide, the park will generate 11m kWh annually – almost 20% of the company’s electricity needs. Athens is accredited at ‘Reduction’ level within Airport Carbon Accreditation.
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INTERVIEW WITH CAROLYN McCALL

PRIMARY AIRPORTS PROVIDE EASYJET PLATFORM FOR FUTURE EXPANSION

The easyJet vision is to ‘Turn Europe Orange’. It currently operates at 190 airports in 30 countries, offering 560+ routes, and continues to build on its pan-European presence, which currently sees 60% of customers originate outside the UK, while over a third of flights do not touch the UK. A 20th base will open at Lisbon Airport during the 2011 winter season, while another will open at London Southend Airport in April 2012. Prior to joining easyJet, McCall spent 24 years in publishing with the Guardian Media Group – the final four years in the position of Group Chief Executive. She arrived with a proven track record of successful operational delivery in a fast-changing, consumer-facing business, alongside government and lobbying experience. Her first priority was to address operational issues, which last summer saw a high level of cancellations and poor on-time performance. McCall attributes this to the airline not having the right number of crew in the right locations at the right times, coupled with industrial action by air traffic controllers across Europe. “I focused on punctuality and reliability, which are issues linked to customer satisfaction. One of the first things I did was to appoint a new Operations Director – Warwick Brady,” she said. Resolution of the dispute with easyGroup IP over the terms of the ‘easyJet’ brand licence was another priority. easyGroup is the private investment vehicle of entrepreneur Sir Stelios Haji-Ioannou. It is owner of the ‘easy’ brand and licenses it to all of the ‘easy’ branded businesses, including easyJet, which Stelios founded in 1995 and in which he remains the largest single shareholder (38%). A revised agreement was announced in October 2010, which confirms easyJet’s worldwide rights to the use of its brand on a basis that protects its current commercial activities and provides clarity and certainty over the terms of the licence. The rights will continue for a 50-year term, with a minimum commitment of 10 years in return for an annual royalty payment of 0.25% of easyJet’s revenues. The payment is fixed at £3.9 million (€4.4m) and £4.95 million (€5.6m) for the first two years of the agreement. McCall explained that, importantly, it gives easyJet the operational flexibility and commercial freedom to grow its business. Consequently, in March, the airline joined the Nectar loyalty programme in its first commercial initiative since the new brand licence agreement. It means Nectar points

“We are focused on the breadth and depth of the network and have a leading presence on Europe’s top 100 routes. Leading positions drive yields as we offer time sensitive customers a quality schedule.”

Carrying more than 50 million passengers per year, easyJet is the UK’s largest airline and Europe’s fourth largest. Carolyn McCall became easyJet CEO on 1 July 2010. In a wide-ranging interview, following her keynote speech at this year’s ACI EUROPE Annual Congress, she expanded on subjects including her strategic vision for the future of the airline, aviation taxation and the airport-airline relationship. Ross Falconer reports.
can be exchanged for easyJet flights – every 500 points is worth £2.50 (€2.80). “It offers greater flexibility for our existing customers, as well as opening up opportunities to new Nectar customers. Unlike traditional flight point schemes, it allows customers to choose to get a discount on any flight, any day, across the easyJet network,” explained McCall.

Nectar is the UK’s largest loyalty programme. It was launched in 2002 and now has more than 18 million cardholders. The launch members were Sainsbury’s and BP, and other current members include the AA, Expedia, Ford, Hertz and Vision Express. Cardholders can save up points for rewards with the member companies. Rewards include money off shopping, travel, eating out, and general merchandise.

It was also announced in March that easyJet had formed a partnership with VisitBritain – the UK’s national tourism agency – to jointly market Britain as a tourist destination over the next four years. The deal is worth around £18 million (€20.5m) in cash and marketing in kind, and aims to capitalise on opportunities such as the Queen’s Diamond Jubilee and London Olympic Games in 2012. The four-year campaign aims to deliver four million extra overseas visitors, £2 billion (€2.3bn) more visitor spending in the UK, and 50,000 new jobs across the country.

Focus on business travellers

The leading positions that easyJet has built at primary airports, such as London Gatwick, gives it the platform for future expansion in Europe. Over the past five years, easyJet has grown from being a UK-centric airline to one that has developed a significant presence in mainland Europe, with valuable positions at slot-constrained airports. easyJet is number one at London Gatwick, Milan Malpensa and Geneva, and number two in Paris. The figures speak for themselves: 84% of easyJet’s routes involve at least one slot-constrained airport. “We are focused on the breadth and depth of the network and have a leading presence on Europe’s top 100 routes. Leading positions drive yields as we offer time sensitive customers a quality schedule,” said McCall.

The strength of easyJet’s business model is centred on offering low fares to convenient airports. Its success is reflected in a 2010 performance that delivered a robust financial result against a difficult economic backdrop. Pre-tax profit grew by £99.3 million (€113.4m)
The absolute best souvenir to bring home from Lisbon.

To bring back home ACI EUROPE's Best Airport Award for the second time indeed made us feel very proud. But what we find most encouraging is a clear constant in the jury’s considerations: both in 2009 and this year, Schiphol’s attention to the environment turned out to be a decisive factor in awarding us the prize. Of course this is an important recognition of our efforts. But it also underlines that the environment has become a make or break factor for the industry as a whole. However, the jury didn’t award us just for this – we promise to make it as difficult as we can for next year’s competition on all aspects. And in the meantime, a warm ‘Thank you’ from everyone in AMS to everyone who voted for us.

www.schiphol.nl
to £154 million (€175m) driven by strong revenue performance – total revenue grew by +11.5% to £2.97 billion (€3.4bn). The airline is focused on increasing total revenue per seat, which in 2010 was £53.07 (€60.61) – an increase of +3.3%, which is attributed to the strength of the route network, good route management and growth in ancillary revenues. “The trend in the industry is that revenue per seat is going down – we want to be against that trend. The key way of growing revenue per seat and getting more yield is from business passengers, and our product is relevant to those passengers,” commented McCall.

The new Flexi fare gives passengers unlimited flexibility to change their booking, within a four-week window, up to two hours before departure. Flexi fare also gives automatic speedy boarding and a checked-in hold bag, catering to the needs of business travellers. 18% of easyJet’s passengers are currently travelling on business and we’d like to grow that to 23% over time.”

She explained that France is a compelling investment opportunity. Comparing summer 2011 with summer 2010, easyJet’s biggest increase in weekly flights is in France (+133 flights). Meanwhile, the UK, which is still easyJet’s biggest country market by far, increased less (+94 flights).

“In France, LCC market penetration is still relatively low at 24%. easyJet is the second biggest carrier there with three bases, including the two Paris airports and Lyon. It is still an immature market for low-cost carriers and we are in a really good position.”

McCall also believes the new Berlin Brandenburg Airport Willy Brandt will present opportunities for easyJet.

Cooperation and partnership

McCall is of the opinion that airports need to reflect changes in the airline market, specifically the rise of point-to-point low fares airlines. “Too many airports still focus on addressing old business models. Passengers value simple and efficient infrastructure and good, quick service,” she said. “The road ahead needs to be one of cooperation and partnership. We work very closely with airports on enhancing the passenger experience. I am ensuring that every part of easyJet is aligned behind improving the passenger experience.”

The airline places a strong emphasis on service on the ground, with McCall reporting virtually no complaints regarding its onboard service and very positive feedback on the cabin crew. “The vast majority of complaints are related to service on the ground – queuing, communication issues and baggage issues, for example. We communicate with passengers via mobile and it is critical we get a ground agent to work with customers as we would work with them.”

London Southend airport is a good example of a strong collaborative approach between airport and airline. The airport is being redeveloped in a way that suits the easyJet model. It is about to open a new terminal, has extended the runway and is putting in a new rail link with excellent service into central London. easyJet will base three A319s at London Southend from April 2012, operating 70 weekly flights to eight destinations – Alicante, Amsterdam, Barcelona, Belfast International, Faro, Ibiza, Malaga and Palma de Mallorca. These are expected to deliver 800,000 annual passengers.

“Southend designed the terminal around us and the customer experience is fantastic,” said McCall. “We will move three aircraft from Stansted to Southend, as the catchment areas overlap. A lot of crew from Stansted will also relocate to Southend. Economically it will be good for us, as the cost per
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passenger is lower. Interestingly, London Southend is also the closest airport (that easyJet can use) to the London Olympics site. That is not the reason for opening a base there – we would have done that anyway. But we will use the fact to promote our first Southend services.

While easyJet will be shifting aircraft to London Southend, that does not necessarily mean it will be reducing capacity at London Stansted. Deepening the frequency of its existing routes is central to its strategy for organic growth.

**Taxation suppresses demand**

easyJet fiercely opposes Air Passenger Duty (APD), which McCall says suppresses demand. She is forthright in describing taxes on aviation, such as those in the UK, Germany and Austria, as "horrendous". "We support the EU Emissions Trading Scheme (ETS) as more effective. We're increasing efficiency and reducing emissions. We're committed to sustainability and our strategy is to grow efficiently and profitably," commented McCall. "The long-term impact of volatile oil prices is that air fares will rise. We are facing the triple whammy of high oil prices, the EU ETS coming in 2012, and APD in the UK. APD is ridiculous – I don't see why the government is adding an environmental tax and APD, which is also supposed to be for the environment."

In May, easyJet published an independent report by Frontier Economics on the UK Government’s proposed changes to APD, which would see the aviation tax rise from £12 (€13.7) to up to £16 (€18.3) per person for flights up to 2,000 miles and reduce the rates and number of tax bands on long-haul services. The report claims that the proposals would reduce UK passenger numbers by three million per year, increase CO₂ emissions by up to 360,000 tonnes per year, reduce tourist spending in the UK by £475 million (€542m) per year, reduce UK GDP by £2.6 billion (€3bn) per year, and lead to the loss of up to 77,000 jobs. "This independent report shows that the Government’s proposals on APD would be bad for the environment and the economy. APD has already risen by +140% since 2007 on short-haul flights," said McCall. "This report provides convincing evidence that the Government should not impose further increases in APD on short-haul flights and should rethink its policy on aviation taxation. easyJet is in favour of a move to a per plane tax. Four out of five British passengers would be better off under such a tax and, more importantly, it would encourage the industry to fly more efficiently."

**Potential for organic growth**

easyJet’s 200-strong fleet includes 25 Airbus A320s, which has enabled it both to extend its network to longer range destinations such as Israel, Egypt and Turkey and to fly a higher number of passengers at highly slot congested airports. In March, the airline launched services from London Gatwick to Amman in Jordan. At five hours the route is easyJet’s longest and McCall says the airline has no plans to fly further. "We’re a point-to-point carrier specialising in quick turnarounds. We don’t want to overcomplicate that with too many long routes. We are not planning to look at long-haul. There is a lot more room to grow organically from where we currently operate. Egypt also works well for us; UK-Egypt traffic is holding up very well."

On the subject of the LCC/network carrier relationship, McCall explained that it is not on the easyJet agenda to pursue any code sharing or feeding arrangements similar to those between Air France-KLM and GO!, or Lufthansa and JetBlue. "Given that our entire world view is that we want it to be simple and uncomplicated, it would have to be materially beneficial to easyJet for us to do it," she commented.

easyJet will adopt a conservative approach over the next 18 months, keeping its fleet size flat because of a combination of high oil prices and consumer confidence remaining fragile. So, while the economic outlook in Europe remains uncertain, easyJet appears well positioned for future success, with a strong balance sheet and a robust European route network. "My long-term vision is for easyJet to be Europe’s preferred short-haul airline and we are on the way there. We have the most number of routes on the most valuable city pairs and I intend to build on that. We are on our way and there is a lot of potential for organic growth," concluded McCall.
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ACI EUROPE ANNUAL ASSEMBLY: NEW ECONOMIC AND OPERATIONAL REALITIES

The event attracted more than 400 delegates, including representatives from airports, airlines, aviation service companies and suppliers, air traffic management experts, national governments and the European Commission. It provided a productive forum in which to discuss issues including shifting global economic parameters, adapting to acts of nature on the ground and modernisation in the air, and putting the joy back into the airport experience.

In his ‘State of the Industry’ address, Olivier Jankovec, Director General, ACI EUROPE reported detailed key figures on the European airport industry in 2010 – an uneven 2010, which saw airlines clearly concentrating on yields and 47% of regional airports still losing traffic. With airline capacity remaining unchanged for the year, he particularly underlined the impact of airline volatility on the European airport network. In 2010, airlines opened 4,747 new routes in Europe, but closed 3,330 routes. For 2011, he spoke about a “brighter – yet uncertain – outlook”, with a full-year forecast of +6% passenger growth, but warned that the outlook for freight is less promising. “Changes in the market are tremendous – we’re clearly entering a new era for global aviation,” commented Jankovec, “with massive traffic growth predicted and Asia set to surpass all other aviation markets.”

In his welcome address, Ad Rutten, COO, Schiphol Group and outgoing ACI EUROPE President, said that the past 12 months have provided plenty of evidence that European aviation still faces many challenges. “In my view, they have also revealed the growing importance of getting things right, when it comes to our policy and regulatory frameworks,” he commented.

Rutten shared three key priorities for a strategically oriented policy and regulatory framework supporting European aviation. The first priority is to provide legal certainty. “We used to have that in Europe, and it used to be a competitive advantage over other world regions, where legal uncertainty tended to be widespread. However, in recent years, we have seen worrying examples of European governments abruptly changing the rules for airports, by shifting policy or resorting to unwise regulatory interventions,” said Rutten. “We need a better climate to attract private investors. Our decision makers at national and European level need to get this right – or investors will understandably look elsewhere, or simply be more demanding on returns and guarantees.”

The second priority is to reduce costs and promote both operational and environmental efficiency, while the third priority is to provide new business opportunities. “The maturity of the European market and the boom of aviation in emerging countries mean that our most promising opportunities are now outside Europe. We must be in a condition to attract and develop air traffic flows to and from our external markets. This is essential to protect and reinforce the position of Europe on

Colin Matthews, CEO, BAA, highlighted the competition that exists between airports such as Heathrow and Amsterdam Schiphol, indicating his belief that regulators do not always understand that competition.
the global aviation market. And for that, there is only one way: liberalisation!” explained Rutten. “The EU must seriously look at taking a leadership position globally on aviation liberalisation, and make the most of the “first mover” advantage. We need to step up efforts to extend our open aviation market to the East and across the Mediterranean. We also need liberalisation with our trading partners in all emerging markets – the BRICs of course, but also Mexico and the ASEAN countries.”

Keynote addresses were delivered by Luiz Fuchs, President, Embraer Aviation Europe and Carolyn McCall, CEO, easyJet. McCall is the subject of our lead interview (see page 11), but in summary, she described the easyJet vision of ‘Turning Europe Orange’, while maintaining a commitment to increasing efficiency and reducing emissions. McCall, who became easyJet CEO in July 2010, explained that the airline is focused on a network of convenient, primary airports. Referring particularly to airports, she said that they need to reflect changes in the airline market, including “the rise of point-to-point low fares airlines”, “passengers want simple and efficient infrastructure and services” and “investment that passengers value”.

Fuchs offered his perspective on the contribution of emerging economies towards the future of European aviation. “Despite the crisis, non-EU markets have been important contributors for growth,” he said. “The Middle East is partly offsetting the contraction of the market.” China is expected to become the world’s largest economy by 2029 and, according to Fuchs, “emerging economies will provide strong support for the growth of the economy and air transport”. “North America and Europe are expected to see a decrease in their market share, but remain strong on aircraft deliveries,” he added. While network carriers are focused on exploring international markets, particularly in Africa, the Middle East and Latin America, the regional carriers are more critical to supporting intra-EU traffic. Around half of deliveries to 2029 are expected to be narrow-body aircraft.

Fernando Pinto, President and CEO, TAP, explained that “the better the networks and hubs operate, the more competitive the airports and airlines are”. “The consolidation movement is reinforcing networks. The problem we’re suffering is a lack of investment in infrastructure and new capacity”, he commented. Jos Nijhuis, President and CEO, Schiphol Group, picked up on the subject of airline consolidation, describing it as “a threat and an opportunity”. “We are blessed at Schiphol that KLM has built a good network in China. Our aim is to be the main European hub for China,” he added.

BAA continues to undertake significant investment at London Heathrow, with a brand new Terminal 2 for the Star Alliance carriers, a refurbished Terminal 4 for SkyTeam and T5c completing the Terminal 5 development for oneworld. Colin Matthews, CEO, BAA, highlighted the competition that exists between airports such as Heathrow and Amsterdam Schiphol, indicating his belief that regulators do not always understand that competition.

Matthew Baldwin, Director of Air Transport, European Commission, spoke about capacity on the ground. “We face up to five million flights not met by 2030. The European Commission is ready to confront this,” he said. “The Single European Sky is grinding into motion. Technology has a role to play in the SES.”

### Airport investment

Juan Lema, President, Aena, delivered a special presentation on Spain’s new airport management model. Aena Aeropuertos operates 47 airports and two heliports in Spain and participates, directly or indirectly, in the management of a further 27 airports abroad. “The start of Aena Aeropuertos marks a milestone in the history of airport management in Spain. The new model will allow us to improve competitiveness in an increasingly demanding environment, while implementing an autonomous and flexible business management,” explained Lema.

Aena Aeropuertos was created in February 2011 and in July the concession companies of Madrid-Barajas and Barcelona-El Prat airports were created. Allocation of the controlling stakes in the Madrid-Barajas and Barcelona-El Prat airport concession companies will take place in December.

“The air traffic increase, the growth of commercial revenue and the cost restraints will allow an improvement of Aena Aeropuertos income statement, which will be profitable in 2012,” commented Lema.

His address was followed by ‘The Airport Investors Forum’, which featured four panelists: David Stanton, Airport Director, MAp; Michael McGhee, Partner, Global Infrastructure Partners; Dr Stefan Schulte, Chairman of the Executive Board, Fraport; and

### The ACI EUROPE Best Airport Awards 2011 winners and presenters.

The 7th annual ACI EUROPE Best Airport Awards ceremony took place at the gala dinner during the 21st ACI EUROPE Annual Assembly. This year’s judging panel featured a group of independent experts, including ACI WORLD, EUROCONTROL, ECAC and the Disabled People’s Association (Denmark).

**The winners:**

- **1-5 million passengers category:**
  - Bournemouth Airport (owned by Manchester Airports Group)

- **5-10 million passengers category:**
  - Edinburgh Airport (owned by BAA)

- **10-25 million passengers category:**
  - ICF Antalya Airport

- **Over 25 million passengers category:**
  - Amsterdam Airport Schiphol

**Eco-Innovation Award:**
- *Judged by the Advisory Board of Airport Carbon Accreditation*
- Zurich Airport

Finally, a new award – the WBP Recognition Award – was presented to Harry Diehl, retired top executive of Gebr. Heinemann, in recognition of his leadership in advancing airport retail and developing increased cooperation between airports and their commercial partners through his involvement in ACI’s World Business Partner programme.
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Francois Berisot, Project Director, VINCI Airports.

The aviation industry has demonstrated its resilience in recovering from external shocks. Stanton said that recovery of capacity and passenger traffic is consistent with long-term trends. MAP has a 74% interest in Sydney Airport, a 30.8% interest in Copenhagen Airport and a 39% interest in Brussels Airport. "Current airline capacity increases are being driven by recovery from the global financial crisis and structural changes in the aviation market," commented Stanton.

He explained that the opening up of bilateral air rights has driven traffic growth at Sydney, particularly in the Chinese and North American markets. Meanwhile, low-cost carrier development has provided significant capacity growth and efficient use of airport infrastructure. Dr Schulte explained that Fraport’s strategic goals are "value creation, performance and sustainability". Indeed, profits are increasing across all segments, including aviation, retail and real estate, and ground handling. Schulte outlined some impressive figures, with passenger numbers at FRA to increase by between 4% and 7% in 2011 from the 53 million handled in 2010. 4-7% growth per year is expected to continue until 2015. Meanwhile, revenues of £2.3 billion are expected for 2011.

**Acts of nature and ATM modernisation**
Adapting to acts of nature on the ground and modernisation in the air

Rutten: "We must be in a condition to attract and develop air traffic flows to and from our external markets. This is essential to protect and reinforce the position of Europe on the global aviation market. And for that, there is only one way: liberalisation!"
Antalya Airport

Antalya Airport, operated by ICF Airports, is the gateway to attractive Turkish Riviera.

ICF Airports which was established in Antalya in May 2007 as a joint venture of German Fraport AG and Turkish İctaş won the tender to operate all three terminals in 2008. Despite the global crisis in 2009, ICF Airports hosted more than 18.7 million passengers. In 2010, ICF Airports hosted 22.2 million passengers with an increase by 19%. Domestic passengers increased by 11.9% and reached to 3.6 million; on the other hand international passengers increased by 18.6 and reached to 18.6 million.

With the synergy of Fraport AG and İctaş joint venture and also with its employment opportunities, ICF Airports is one of the biggest employer companies in Antalya and it also contributes into economy. As the gateway of Turkey to the world and tourism, ICF Airports is gradually attracting attention of more professionals living in big cities. Beside the employment opportunities it provides, ICF Airports also contributes to Turkish economy in high amount. ICF Airports gives customer-oriented, high quality service to its shareholders and the region.

ICF Airports invests to promote Antalya and the region

The investments of ICF Airports in Antalya are not just limited to the investments made for the airport but ICF also carries out many important projects to promote Antalya and the region:

AKTOB-ICF Airports cooperation

ICF Airports has cooperated with the association of Mediterranean Tourism and Antalya destination is promoted with an advertising campaign in Frankfurt Airport (operated by Fraport) in 2009. This kind of promotional activity had not done before in Frankfurt Airport which hosts nearly 55 million passenger per year from different nations. Getting very positive feedback from the tour operators and agencies about the cooperation, AKTOB and ICF Airports have decided to continue this promotional activity in Frankfurt Airport through 2010 and 2011.

Routes Tourism Mediterranean

Another important step taken by ICF Airports in the way of promoting Antalya is that it was the host of the most important civil aviation event Routes Forum in Antalya. The Routes Forum was performed in Antalya by including also ‘tourism’ concept for the first time on 13-15 February 2011. In the Routes Tourism Mediterranean Forum nearly 350 participants who were the delegates of airport, airline companies, tour operators and hotel chains were welcome from 35 countries in the Mediterranean Region. The Routes Forum where the business meetings were held helped Turkish airports to gain new customers and also lead airline companies to adopt new routes. Three-day long Forum had great effect on promoting Antalya and also was a good way to show the tourism potential of Antalya which lasts 12 months.

The Routes Forum where many business meetings were held and resulted in new co-operations will bring great results in the next term for the whole aviation and tourism sector.

Best of Europe is Antalya Airport

ICF Airports which has been deemed worthy of many national and international awards, has also been awarded with the most important international airport award deemed “Europe’s Best Airport” in the category of 10–25 million passengers by the ACI Europe in a ceremony organized in Lisbon. ACI Europe organization represent of 400 airports from 46 European Country and is the main airport organization of Airports in Europe. ICF Airports was awarded thanks to its physical and commercial transformation in the past decade, and due to its successful solutions in terms of efficiency, quality and environmental awareness.

ICF Airports conducting studies in the field of carbon accreditation since 2009 completed “reduction” level and become the only company which reached this level in Turkish aviation sector. Having TSE certifications in the field of Environment Management, Quality Management, Occupational Health Safety Systems and Customer Satisfaction Systems, ICF Airports is the only company which has four TSE certification in aviation sector and one of 25 among all sectors.
was another key theme of the conference. Stewart Wingate, CEO, Gatwick Airport, explained that the unprecedented snowfall of the last winter season presented a stern test of the airport’s crisis management processes. “We learned quickly that the snow equipment we inherited wasn’t up-to-scratch. We have worked with the airlines to devise our snow clearing plans and we visited Scandinavian airports. We created a single ‘Silver Command Centre’ and consistent communication messages,” he said. “Communication was a key focus for us. We embraced social media channels.”

Gatwick is also midway through implementing Airport Collaborative Decision Making (A-CDM) – in line with the A-CDM action plan of ACI EUROPE, EUROCONTROL and CANSO. This was also picked up by Philippe Bernard, CEO, Aéroports de Lyon, which launched its own ambitions for A-CDM in May 2011 for implementation by the end of 2012. “Added value in airports, their indispensable role in airports, their indispensable role in the aviation supply chain and the human interaction that takes place in airports. We need your engagement and commitment to SESAR,” emphasised Ky.

The event provided an effective forum in which to discuss the key issues currently affecting European aviation. The consensus was that the industry is experiencing a “new reality” both operationally and economically, and that all industry stakeholders must adopt a proactive, collaborative approach in order to evolve their businesses.

The 22nd ACI EUROPE Annual Assembly, Congress and Exhibition, hosted by Aena, will take place in Madrid from 20 to 22 June 2012.

Patrick Ky, Executive Director, SESAR Joint Undertaking, discussed the Single European Sky ATM Research (SESAR) programme. “Today’s air traffic management systems are based on technologies from the 1950s,” he said. “If we want to cope with increased demand for air traffic and increased safety, we can’t do it without new technology.”

ACI EUROPE and the SESAR Joint Undertaking signed a cooperation agreement at the Annual Assembly. “SESAR is an ATM project, but there is substantial benefit in it for airports. We need your engagement and commitment to SESAR,” emphasised Ky.

The new website is part of the association’s brand new website, by showing a screenshot of the homepage, at the end of his ‘State of the Industry’ keynote presentation.

The new website also points visitors to the social media tools being employed by ACI EUROPE. Following the success of ACI EUROPE’s special report “Airports 2.0, How European airports are Embracing Social Media”, the trade association has moved its own social media activities up a few gears. In mid-July, the ACI EUROPE annual assembly. Declan Collier, CEO, Dublin Airport Authority, was elected to lead the organisation.

Collier said: “I am honoured to take on this role. Recent years have shown our industry still faces plenty of challenges and that we need a strong representation with policy makers and regulators at European level. More than ever, decisions taken in Brussels affect our business, and that trend is only set to continue. I will work closely with our office and staff in Brussels, and will seek to engage the Board and the membership at large in actively supporting our advocacy efforts. Alongside the strong presence and efficiency of our association, my priority at all times will be on ensuring that we defend the collective interests of all our members – regardless of size, location or business model. This includes members of ACI EUROPE’s World Business Partners programme, as they are an essential component of our association. Beyond our membership, I will strive to reinforce industry cooperation with airlines, ANSPs and other stakeholders – experience has shown that we are far more effective when we work in harmony with other stakeholders in the industry. However, this, to me, has to be compatible with airports being treated and recognised as commercial businesses in their own right.”
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AIRPORTS SEEK PRIORITY IN REVISED EIB TRANSPORT LENDING POLICY

As part of the major review of overall EU transport policy currently underway, the European Investment Bank (EIB) launched a public consultation on the revision of its transport lending policy. This process included a stakeholder hearing in Brussels on 6 June, at which ACI EUROPE was represented by Christoph Köppchen, Manager – Economics. Ross Falconer reports.

The EIB is the EU’s financing institution. Its shareholders are the 27 Member States, with its Board of Governors composed of the 27 Finance Ministers. The EIB’s role is to provide long-term finance in support of investment projects in various sectors, including transport. EIB funds are very relevant to European airports, e.g. through the grant of public loans at favourable market conditions for major infrastructure projects. Since the 1970s, more than 220 airport projects have been eligible for EIB funding. However, only a small fraction of the total funds available for the transport sector is earmarked for airport projects. For instance, in 2009, €642 million of funding was granted to the airport sector, which corresponds to 3.6% of the total investment volume in the transport sector.

The review of EU transport policy saw the European Commission adopt a new transport White Paper in March 2011 covering the next decade, entitled ‘Roadmap to a Single European Aviation Market’ and further support economic growth. ACI EUROPE published a response to the EIB consultation in March, in which it states: “The strengthening of the European aviation sector’s competitiveness must be a key priority for European policymakers in the years to come, particularly in light of the mounting competitive pressure from new airport mega-hubs in the Middle East.”

ACI EUROPE believes that the revision of the EIB lending policy should be considered an opportunity to develop a more coherent infrastructure system. It urges that funding should be made available to airports for SESAR related projects, projects aimed at improving environmental performance, projects increasing physical capacity – where ground capacity limitations have a proven negative impact on the aviation network, and projects aimed at improving accessibility to airports.

In light of the many challenges facing Europe’s airports, ACI EUROPE believes the revised EIB lending policy should enable airports to invest in sustainable and competitive infrastructure. Revision of the transport lending policy, taking into account stakeholder views and contributions, is taking place in September and October, and the draft revised policy and draft consultation report will be published on the EIB website in November. They will then be approved by the EIB’s governing bodies and the transport lending policy and consultation report will be published on the EIB website in December.

In recent years, the EIB has financed important projects at both hub and regional airports. This includes a €350 million loan agreement to help finance the continued upgrade and expansion of Amsterdam Airport Schiphol’s baggage handling system, which will be complete in 2013.
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At the start of the summer, ACI EUROPE published its Economics Report 2010, bringing together and analysing in aggregate form economic data from over 190 European airports. The report – kindly sponsored by TAV Airports Holding – covers airports which carried 77% (or over 1 billion) of Europe’s air passengers in 2009 and sheds light on how the industry weathered the recessionary storm. Donagh Cagneys reports.

2010 ECONOMICS REPORT HOLDS A MIRROR TO THE INDUSTRY

While 2009 may seem like a lifetime ago in light of all the turmoil and change which has elapsed in the meantime. Traffic uncertainty, excessive costs of capital and weakened profitability all remain worries which are keeping airport CEOs awake at night, with clear blue skies still remaining some way off. With the threat of a double-dip recession casting a cloud over the global economic outlook, the ACI EUROPE Economics Report 2010’s findings are all the more relevant.

In this liberalised European aviation market, airports are facing extreme financial and competitive pressures. While low levels of airport charges and other support measures are often a prerequisite to attract a carrier to an airport, airports still need to cover the operational and capital costs required to facilitate their airline and passenger customers. Hence the ACI EUROPE Economics Report 2010 shows that the viability of Europe’s airports can no longer be automatically taken for granted, particularly in the face of trading conditions experienced in the last few years.

For example, and perhaps most telling of all, 41% of airports were loss-making in 2009. Yet at the same time almost 70% of airports either lowered their charges or kept them stable – a clear reaction to the harsh market conditions being experienced by the sector. And simultaneously there was a shift, not only in the level of charges but also in the structure of those charges. Moving to a higher proportion of passenger-related charges, airports stepped in and effectively shouldered more of the risk for which airlines were previously responsible, in addition to the lowering and freezing of charges. This meant that in 2009, airline-related charges accounted for only 19% of total airport revenues.

These steps taken, while a necessary response to satisfy market demand, have had a direct knock-on impact on airports’ plans for the future. Airports, under pressure, have been forced to decrease their capital expenditure projections for both 2010 and 2011. This can be traced back to the toxic confluence of cost of capital problems impacting the wider economy, with the airport industry-specific pressures outlined above.

“The findings speak for themselves,” notes Jeff Salter, Business Development Director of Copenhagen Airport and Chair of the ACI EUROPE Economics Committee. “While we must embrace both the challenges and opportunities that liberalisation has brought, the industry still needs to be given room to invest for the future. With air traffic set to double by 2030, the airport infrastructure must be in place to facilitate that growth.”

Caught between a rock and a hard place, airports remained heavily dependent on non-aeronautical revenues to subsidise core operations for airline customers, whilst also keeping their heads above water – so much so that these accounted for 47% of total revenues in 2009.

But while these efforts may help mitigate the problem, in the long run a more sustainable solution is required, with the facts making it clear that airports’ financial viability and the delivery of more capacity are intrinsically tied up with each other.

The report sheds light on other important policy issues too. With the Ground Handling Directive currently being revisited by European policy makers, it’s instructive to know that airport revenues from ground handling plunged 20% between 2009 and the preceding year. Overall, airports now represent only around 15% of this particularly competitive market. This not only highlights the far-reaching impact of the current Directive. It also suggests that existing competitive pressures are such that a further opening of the market risks its fragmentation, and in the process jeopardises the efficiency and quality of ground handling operations at many airports.

To download the full report, visit the Policy Library section of the ACI EUROPE website: www.aci-europe.org
Whatever the size of their operation, all airports have one thing in common – an ongoing struggle to combat rising costs without compromising operational efficiency. Fortunately, technology is constantly evolving to provide cost-effective solutions to the challenges generated by soaring expenses, growing passenger numbers and ever-changing security requirements.

With over 80 years’ experience of developing innovative products and services for the aviation sector, ARINC has unrivalled expertise in this area. More than 325 airlines and 125 airports use ARINC systems worldwide. The proven technology which the company provides across virtually all airport operations continues to help shape the future of the industry as it has done since ARINC pioneered air-to-ground communications back in 1934.

In recent years common-use technology that enables multiple airlines to share computer systems at airport check-in desks and boarding gates has become well established. It is envisaged that the next decade will see many airports and airlines moving away from PC-based applications to those hosted in cloud computing environments. The advantages of hosted services include not only lower capital outlay and greater efficiency but also a reduction in power consumption, space requirements and IT airport costs. Industry estimates of financial savings compared with running multiple work-station operating systems on a single physical server range between 50% and 70%.

Shrewd airport managers are already enjoying all these benefits after opting for ARINC’s new passenger check-in system. Installation of ARINC’s hosted CUPPS (Common Use Passenger Processing) service, part of the company’s vMUSE Enterprise offering, enables lower-cost ‘thin client’ devices – user workstations with no hard drive and no moving parts – to be used in place of conventional computers at service desks. This eliminates the need for on-site servers, dedicated telecommunications lines and technical support. Processing is carried out at one of ARINC’s remote data centres, with response times the same as from an on-site PC.

Not only can the scalable, hosted check-in – a particularly attractive offering for airports with up to 100 workstations – be deployed extremely quickly but extra workstations can be added in a matter of minutes.

Indeed, ARINC’s status as a global leader in common-use passenger technology is demonstrated by the fact that it supplies over 60% of the world’s common-use self-service (CUS) kiosks. These speed the check-in process, reduce queues, enable airline cost-sharing, save floor space and improve the customer experience. ARINC will continue to exploit the benefits of common-use technology, including thin clients, virtualisation and cloud computing, by designing new systems to meet the ever-changing demands of the industry. At the same time, the company provides a comprehensive service to enhance customers’ legacy solutions, ensuring they are CUPPS compliant and certified.

It’s all part of the service at ARINC which has unrivalled experience in delivering reliable, versatile and innovative solutions to improve all airport operations, from baggage management and passenger reconciliation to terminal optimisation and automated turnaround activity.

To learn more email emea@arinc.com, or visit arinc.com
FURTHER LIBERALISATION ESSENTIAL TO ENSURE EUROPE’S RELEVANCE

At this year’s ACI EUROPE Annual Congress in June, the trade body launched a campaign on aviation liberalisation, with the release of a special publication entitled ‘Expanding Europe’s Aviation Market - Prerequisite for Global Relevance’. It highlights the challenges and opportunities facing European aviation, as well as identifying key priorities for EU aviation policy. Ross Falconer & Robert O’Meara report.

In his speech at the ACI EUROPE Annual Congress, Ad Rutten, outgoing ACI EUROPE President and COO, Schiphol Group, explained that “the maturity of the European market and the boom of aviation in emerging countries mean that our most promising opportunities are now outside Europe”. “We must be in a condition to attract and develop air traffic flows to and from our external markets,” he added.

Europe’s airports lost 100 million passengers in the wake of the global financial crisis and traffic recovery has been comparatively slow. That contrasts with Africa, Asia and Latin America, which have experienced a dynamic recovery since 2009. European aviation is also facing competitive pressures from emerging countries, in which aviation growth is a priority for national economic policy.

Echoing the newly released ACI EUROPE publication’s call for an acceleration of aviation liberalisation, Rutten declared “European aviation is at a crossroads. There is no more time to lose. We must move forward with liberalisation with the new economic powerhouses in Asia and Latin America. The future relevance of the European aviation market hangs in the balance.”

Single European aviation market – ‘a unique asset’

The Single European aviation market was established in the 1990s, removing all restrictions on air services within the EU. This created the world’s largest liberalised aviation market and the impact has been phenomenal, for all stakeholders and the European economy. The emergence of the low-cost carriers, for example, has resulted in significant network development.

The ACI EUROPE publication emphasises that the Single European aviation market is “a unique asset which has fully served its purpose, allowing aviation to provide optimum connectivity for Europe, with a contribution of more than €120 billion to its economy and 3 million jobs.”

The ACI EUROPE publication contains three guiding principles. Firstly, take a leadership position, recognising the key role of aviation liberalisation to enhance the competitiveness of the European air transport industry. This is important to protect and reinforce the position of Europe’s airport hubs and network airlines, and to create new business opportunities for Europe’s regional airports, as well as Europe’s network and low-cost airlines. Aviation liberalisation is about creating a competitive marketplace for the benefit of the travelling public, and the European economy. The EU needs to take the lead to protect its position as a dynamic and attractive aviation market, and also to position itself to compete with new and emerging aviation powers.

Secondly, “first mover” advantage – moving now to liberalise aviation between the EU and its external markets – before liberalisation efforts between emerging markets step up – would enable Europe to further capitalise on what has already been achieved. This would protect and reinforce the position of the European aviation market on the global stage. Moving first on aviation liberalisation would also be important for the dissemination of European technical standards – potentially significantly beneficial for the European aerospace industry. It is about putting European aviation in a position to anticipate and adapt to the new reality of the global aviation market.

Thirdly, extending the European Common Aviation Area and reaching out to the EU’s main trading partners.

“The EU must seriously look at taking a leadership position globally on aviation liberalisation, and make the most of the "first mover” advantage. We need to step up efforts to extend our open aviation market to the East and across the Mediterranean. We also need liberalisation with our trading partners in all emerging markets – the BRICs (Brazil, Russia, India, China) of course, but also Mexico and the ASEAN (Association of South East Asian Nations) countries,” explained Rutten. “The European Commission
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www.vanderlande.com
is very supportive on this point, but it needs both a renewed political commitment and adequate resources for the task.”

ACI EUROPE calls for the EU to step up efforts to create a pan-European/Mediterranean aviation area, extending to North Africa, the Near East, Turkey and all countries to the East of the EU except Russia, but including Central Asia. The ACI EUROPE publication highlights the significant potential for air traffic development, given the existing economic, political and cultural ties between these countries and EU States. This potential is borne out by the example of the EU/Morocco aviation agreement signed in 2006 – total passenger traffic increased by +22% in 2007 to 8 million.

It is of particular relevance to regional airports. Tonci Peovic, General Manager, Zagreb Airport and Chair of ACI EUROPE’s Regional Airports’ Forum, said: “I strongly advocate aviation liberalisation. Regional airports have no slot constraints because they are underutilised. These airports can be a future point of cooperation with the emerging economies.”

‘Expanding Europe’s Aviation Market...’ has already been distributed to ACI EUROPE members, the EU institutions and other key authorities and stakeholders. ACI EUROPE is also liaising with Members States to enlist support for its proposed strategy. The European Commission is reportedly very appreciative, especially as some other aviation stakeholders are not very supportive of further liberalisation, in particular airlines like Lufthansa and Air France-KLM.

However, in the globalised, multi-polar world of today, further liberalisation beyond the current boundaries of the Single European aviation market, should be a political priority. Indeed, under the current Polish Presidency of the EU, a special EU-Russia Aviation Summit is due to take place in St Petersburg on 12 & 13 October. European Commission Vice President in charge of Transport, Siim Kallas will speak at the event, as will ACI EUROPE Director General Olivier Jankovec.

‘Expanding Europe’s Aviation Market - Prerequisite for Global Relevance’ can be downloaded from the Policy Library, on ACI EUROPE’s website - www.aci-europe.org
The UK Chancellor, Rt Hon George Osborne MP, announced in his 2011 Budget that Air Passenger Duty (APD) would be frozen in 2011/12, but would be increased by double inflation in 2012/13. A campaign, backed by the UK Airport Operators Association (AOA), was launched in early-July in an effort to persuade the Chancellor to abandon the planned rise. Ross Falconer & Donagh Cagney report.

An excise duty charged on passengers flying from a UK airport on an aircraft above a certain size, Air Passenger Duty (APD) ranges from £24 to £170, per passenger, per flight, depending on the distance being travelled.

Darren Caplan, chief executive of the AOA, said: “Our message to the Chancellor is that enough is enough. Air Passenger Duty has already gone up by 325% on long haul flights and 140% on short haul flights in the last five years. Family finances are under great pressure at the moment and most people save hard all year for their holiday. Working families deserve a break.”

The ‘Hands off our holiday, Mr Taxman!’ campaign was launched at nine UK airports – Belfast International, Bristol, Gatwick, Glasgow, Liverpool John Lennon, London City, London Luton, Newcastle and Newquay Cornwall. The aim was to raise the profile of APD among the public, focusing on both the current internationally-high level and the impending rises due in 2012; building support from Members of Parliament (MPs) and encouraging them to lobby the Chancellor and the Treasury; and to raise the profile of APD-related issues among national and regional media.

Campaign team members were stationed at the airports handing out leaflets, and asking passengers to lobby their MP and the Chancellor to abandon the proposals to increase APD. Campaigners wore special ‘Hands off our holiday, Mr Taxman!’ branded t-shirts, handing out around 20,000 leaflets.

AOA reported fantastic results, with more than 17,000 people emailing their MPs via the campaign website. 648 out of a possible 649 MPs were contacted at least once by the travelling public. The Association itself also undertook to build political support, emailing 1,223 representatives in both the upper and lower houses of UK parliament. Beyond British shores, Member of European Parliament (MEP) Timothy Kirkhope wrote a letter to the Chancellor supporting the campaign. Finally, the campaign also used the internet and social media to generate support, with more than 70,000 unique visitors to the campaign website generating 350,000+ page views, and over 1,500 Twitter messages in support.

ACI EUROPE also got involved, writing an open letter to the Chancellor which reinforced the campaign’s arguments, and drawing upon its recently-completed Position Paper on Aviation Taxes. The campaign’s online strategy was also backed up by exposure on ACI EUROPE’s Twitter feed (@ACI_EUROPE).

While the campaign is ongoing, there have been some initial signs of success, with the UK Chancellor announcing that APD rates in Northern Ireland will be dramatically cut from 1 November 2011. Seen as a response to the competitive pressures from airports in the Republic of Ireland, the move is an implicit acceptance of the tax’s adverse impacts.
Double inflation and double taxation

Significantly, the proposed double inflation APD increase would occur at the same time as aviation enters the EU Emissions Trading Scheme (ETS) in 2012. This means that the industry would be subject to a double tax charge, as well as a double inflation increase in one of those taxes. The level of tax on aviation is already high in relation to that paid by other sectors.

AOA Chairman Ed Anderson commented: “Our research has shown that passengers departing the UK can pay up to 8.5 times more in tax than the European average. Not only does this increase the cost of holidays abroad for families, it puts the UK at a significant competitive disadvantage against its European competitors, making it more difficult to attract inward investment from countries such as China and India.”

He added: “We support aviation’s introduction into the EU Emissions Trading Scheme (ETS) in 2012 as the best way to deal with emissions from aircraft in the absence of a global deal. However, as things stand, the introduction of ETS will simply mean that passengers will effectively face double taxation. We call on the Government to ensure that APD is reduced by an equivalent amount to the revenue raised by ETS. In this way we can help to ensure that aviation can play its full part in delivering jobs, export-led growth and the rebalancing of the economy, within a framework of environmental sustainability.”

Economic impact of APD

While the campaign focused on the direct impact on passengers, it is important to note that aviation taxes actually have a wider negative net economic impact, with the effect of the taxes on the economy as a whole largely outweighing the expected return from the tax. Such taxes discourage travel and reduce the connectivity of the regions. Several EU Member States, including Austria, Belgium, Denmark, France, Germany, Italy, Ireland and the Netherlands, have imposed or proposed to impose a tax on aviation. However already, there have been reversals in this trend. The Belgian Government withdrew plans to introduce a tax in November 2008, following widespread opposition. Similarly, Denmark abolished its transportation tax in 2007 as a result of the negative economic impact and competitive disadvantage for Danish airports.

The Irish Government has announced its intention to withdraw the tax (pending airlines adding more capacity to the Irish market), having already decreased it dramatically, while, in the Netherlands, the tax was suspended in July 2009, following a dramatic negative impact on the Dutch economy.

Aviation has a key role to play in Europe’s economic recovery, contributing to economic growth by facilitating the mobility of people and businesses. While Europe’s airports support the inclusion of aviation in the EU ETS, all national aviation taxes should be withdrawn upon aviation’s entry into the EU ETS in 2012.
Despite growing economic uncertainty across Europe, most of the region’s nations continue to report growth in airline seat capacity this September, according to anna.aero’s analysis of OAG schedule data. Overall, scheduled seat capacity is up 5.3% in the first week of September compared with the same period in 2010. Of the 36 largest country markets, just four have seen a year-on-year reduction in scheduled seat capacity.

This includes Germany, which finally appears to be feeling the effects of the air travel tax introduced at the beginning of the year. Passenger numbers at German airports in the first seven months of 2011 were actually up 6%, but with low-cost airlines suffering in particular and the imminent downsizing of Air Berlin, many smaller German airports are facing an uncertain future. This does not include Lufthansa’s two hubs at Frankfurt and Munich; the former will open a new runway in a matter of weeks, while the latter has been given permission to proceed with plans for a third runway.

Apart from Germany, the other four big European air travel markets (France, Italy, Spain and the UK) are also all growing at less than the overall average, with Italy (+4.4%) outperforming Spain (+2.7%); the UK (+2.0%) and France (+0.8%). The other countries with a decline in seat capacity are Ireland, Malta and Romania. Ireland has seen Ryanair reducing capacity, while Air Malta and Tarom have also been cutting capacity (both reported 9% declines in ASKs in July according to AEA figures). Though too small to feature in the graph, Slovakia actually reported the steepest fall in scheduled seat capacity at 14.3%.

So if the big markets are all growing at below the average, where is growth coming from? The answer is from a mix of Scandinavian and Baltic countries, as well as Russia and the CIS. Three smaller country markets are reporting impressive year-on-year capacity growth of over 30%; Iceland, Estonia and Azerbaijan.

Iceland appears to be taking advantage of last year’s notoriety as the source of the volcanic ash cloud (that disrupted European airspace in April) to stimulate tourism to its country. Tallinn airport is benefiting from a raft of new low-cost services provided by Ryanair, while Azerbaijan’s importance in the global energy market appears to be stimulating traffic, which now even includes a twice-weekly flight to Aberdeen in Scotland, another centre of the energy industry.

While these three country markets are relatively small, Turkey and Russia are Europe’s sixth and seventh biggest aviation markets, and in September they are reporting year-on-year capacity growth of 24.6% and 21.3% respectively. Turkey continues to benefit from the global ambitions of its flag-carrier Turkish Airlines, which is a key member of the Star Alliance, while low-cost carrier Pegasus is also expanding domestically and internationally. Russia’s airline industry, despite some ongoing concerns about safety, continues to see significant growth thanks to carriers such as Transaero and UTair. Nearby Ukraine is also growing fast as it prepares to co-host next year’s European football championships. Ukraine International Airways (+38.6%) and Aerosvit (+104.5%) are the two fastest growing airlines so far in 2011 among the 30-plus members of the Association of European Airlines.
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The SESAR programme was founded by the European Commission and EUROCONTROL in 2004. It is comprised of three phases:

- **Definition phase (2004-2008)** – to deliver an Air Traffic Management (ATM) master plan defining the content, development and deployment plans of the next generation of ATM systems.
- **Development phase (2008-2013)** – to produce the required new generation of technological systems and components as defined in the Definition phase. This phase, with a budget of €2.1 billion, is managed by the SESAR Joint Undertaking.
- **Deployment phase (2014-2020)** – for production and implementation of the new air traffic management infrastructure, composed of fully harmonised and interoperable components which guarantee high performance air transport activities in Europe.

SESAR represents the technological dimension of the Single European Sky initiative, and is designed to provide a high-performance air traffic control infrastructure, enabling the safe and environmentally friendly development of air transport. By 2020, it aims to generate average savings per flight of 8-14 minutes, 300-500kg of fuel, and 948 to 1,576kg of CO2. SESAR will eliminate the fragmented approach to European ATM, transforming the ATM system and synchronising all stakeholders. Significantly, all aviation stakeholders are involved in the Definition, Development and Deployment of this pan-European modernisation project.

"SESAR is set to modernise air transport in Europe. Recent projections predict for Europe a doubling of flights by 2030 compared to 2009 levels. This equals 16.9 million movements; everybody knows that the current air traffic management system cannot cope with such an increase. SESAR is prepared to address this challenge," commented Patrick Ky, Executive Director of the SESAR Joint Undertaking.

**Technical expertise**

The key objective of the SESAR Joint Undertaking is to ensure the modernisation of the European air traffic management system by coordinating and concentrating all relevant research and development efforts in Europe. Under the cooperation agreement, ACI EUROPE will be involved in various research projects, development and communications activities, specifically focused on the role and contribution of airports in SESAR. The agreement builds on the work of the Single European Airports Consortium (an established group of airports participating in SESAR comprised of Aéroports de Paris, BAA, Flughafen München, Fraport, Amsterdam Schiphol and Flughafen Zurich) and is designed to yield a better engagement and integration of the entire airport community into the SESAR Joint Undertaking’s work, with the aim of increasing the efficiency of the European aviation system.

Oliver Jankovec, Director General, ACI EUROPE, said: “We are delighted to be joining forces with the SESAR Joint Undertaking. SESAR is the technological enabler of the Single European Sky and this cooperation reflects a strong focus on integrating airports within the ATM system. Much of SESAR’s work involves airports and many of our member airports are already engaged, with significant investments in the SESAR programme, to help optimise airport operations for the benefit of airlines and passengers today and tomorrow.”

Ky added: “Our collaboration with ACI EUROPE will undoubtedly bring more technical expertise on airport operations and open doors for validation in day-to-day activities. Airports are a key contributor to SESAR and one of the beneficiaries of the SESAR results. SESAR will maximise capacity and bring better operations on the ground and in the air, as well as environmentally friendly solutions for airport operators; clearly vital to every single European airport.”

Partnership, sustainability and user-drive are key concepts of the SESAR Joint Undertaking approach, and this partnership approach is evident through the cooperation agreement with ACI EUROPE.

The SESAR Master Plan – outlining which, where and when technologies are needed – is being updated. Meanwhile, the first SESAR ‘Release’ will take place by the end of 2011 – this will contain 29 validation exercises conducted by SESAR members across Europe, which are aimed at providing improved ATM solutions. Exercises cover efficient airspace operations, end-to-end traffic synchronisation and integrated and collaborative network management.
“Every aircraft that’s been arrested has flown away.”
- Rick Marinelli, FAA Manager, Airport Engineering, Oct. 2010

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The eruption of the Grimsvötn volcano in May resulted in the activation of the European Aviation Crisis Coordination Cell (EACCC) by the European Commission and EUROCONTROL for the first time. Following the positive impact of this inaugural activation, Ryan Ghee explores how, along with the adoption of new technology, the EACCC can help to lessen the impact of future crisis situations.

HARMONISING THE RESPONSE TO VOLCANIC ASH CRISIS

The EACCC was established following the eruption in April last year of the Eyjafjallajökull volcano, with the aim of supporting the Network Manager in coordinating the response to a crisis affecting the European civil aviation network, as well as providing accurate, timely and consistent data to the stakeholders involved.

Comprising senior representatives from the European Commission, EUROCONTROL, the European Aviation Safety Agency (EASA), Member States, aviation industry stakeholders such as ACI EUROPE, AEA and unions, the EACCC is responsible for leading communication between stakeholders and decision-makers, and where appropriate, for escalating an issue to higher decision-making bodies. In these circumstances, ACI EUROPE provides information on the situation at European airports, as well as immediately relays the latest updates to its members at CEO level allowing them to get critical information on the impact of the eruption and the way it was being managed.

“There are three alert levels for the network operations: pre-alert (level 0), major disruptions (level 1) and crisis (level 2),” explained Jacques Dopagne, Director Network Management, EUROCONTROL and co-chair of the EACCC. “The pre-alert phase basically consists of business as usual, warnings about a potential event (industrial action warning, bad weather etc.), and local events on the network.”

The alert can rise from level 0 to 1, however, if the Network Manager feels that the management of an issue should be extended to many partners, in which case the Network Disruption Management cell is activated.

Dopagne continued: “The decision to go from level 1 to 2 comes under the responsibility of the Director Network Management who, once he has decided that the event could have a potential impact on a sizeable portion of the European aviation network, may convene the EACCC.”

This was the case in May, when the Grimsvötn volcano sent an ash plume as high as 17km. As outlined by Siim Kallas, Vice-President of the European Commission, the activation of the EACCC in this instance made a telling difference to the impact on the European aviation network.

He said: “Our aim is to ensure coordinated safety assurance and the ability to quickly formulate mitigating measures. To do this, collaborative decision-making is crucial. That is the reason the EACCC was established. The EACCC has proved its ability to fulfil this role, as is clear from Europe’s handling of the Grimsvötn ash cloud, a clear improvement in comparison with the 2010 Eyjafjallajökull volcanic ash crisis.”

ACI EUROPE Director General Olivier Jankovec was equally enthusiastic “Lessons were learned from the previous volcanic ash shock in April 2010. In the case of a renewed volcanic ash situation, the European Commission, EUROCONTROL and EASA, have worked intensely to devise an alternative procedure for flight operations, safeguarding the highest possible level of safety, while minimising disruption. Now all that’s required is for national governments to be equally ready to react in fresh crisis circumstances.”

Interactive technology

A main difference between the responses to the Eyjafjallajökull and Grimsvötn eruptions was that following the latter, in addition to the lessons learned from the experiences of April 2010 and the European-wide VOLCEx 11/01 volcanic ash exercise, recently developed interactive technology was also deployed.

“We were able to deploy EVITA, the first online European Crisis Visualisation Interactive Tool for ATFCM (Air Traffic Flow and Capacity Management), to help airlines carry out flight planning so as to avoid contaminated areas,” Dopagne said.

Moving forward, there is a desire within the industry, not necessarily solely from the EACCC, to further harmonise procedures to ensure that a coordinated response can be implemented during any future crisis situation. Nick Mower, General Manager Regulatory Affairs, European Regions Airline Association (ERA), said: “Although work continues from the ICAO (International Civil Aviation Organization) expert groups, the methodology to construct SRAs (Safety Risk Assessments) by airlines and the acceptance of these by a number of key States dramatically lessened the potential impact of airspace closure in areas of low and medium forecast ash contamination.”

The prerequisites that would help States in classifying and defining ‘Danger Areas’ while keeping their airspace open, Mower said, are “airworthiness and accurate data requirements including ash tolerance thresholds from engine manufacturers” and “accurate, more granular and higher quality ash concentration data from the Met Offices, fully adapted to the needs of the airspace users”.

‘Close collaboration’

Referring to the role of the EACCC in this harmonisation process, Dopagne added: “The EACCC, in close collaboration with the European Commission, EUROCONTROL and EASA, has been working with States on establishing a consistent response to volcanic ash events and any other crises that may have an adverse impact on European aviation. The EACCC is building on the good progress made by ICAO’s IVATF (International Volcanic Ash Task Force). All the same, there is still work to do in achieving a harmonised European approach, which is compatible with ICAO’s guidance.”

Future lines of action, he explained, include giving high priority and support at a political level to complete the work in defining European guidelines to be used by airport operators (AOs) to prepare SRAs and by NSAs (National Supervisory Authorities) to take account of these SRAs; AOs should prepare and submit SRAs to their NSAs. The issue of gaining mutual recognition of agreed SRAs (in line with ICAO’s protocol) between all EU Member States remains important and still needs attention.

Building on its success to date, plans are in place to further expand the role and scope of the EACCC and it will be reorganised and its composition will be reviewed in the context of the new Network Manager Implementing Rule. The Cell composition will also be extended on a case-by-case basis, depending on the nature of an event that it has to deal with, Dopagne explained. Furthermore, it will also be tasked with handling new events, such as nuclear emission dispersions and the airborne spread of diseases. Dopagne concluded: “The EACCC will also be organising exercises to make sure it is always ICAO-prepared to face new events which might occur, to improve ways of working and to diminish reaction time.”
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AIRFIELD UPGRADE TAKING SHAPE AT WARSAW CHOPIN AIRPORT

A significant milestone was reached in the ongoing development of Warsaw Chopin Airport in August with the completion of the upgrade of Runway 1, and the airport is now preparing for the installation of a CAT III Instrument Landing System (ILS). Ryan Ghee reports.

The repair of Runway 1 started in July 2010 and the 14-month project involved the replacement of the runway pavement together with the base course and the upgrade of all technical systems, allowing for a greater load bearing capacity and resistance. New centre line and edge lighting has also been installed.

While the redevelopment of the 2,860m runway was ongoing, all flights to and from Warsaw Chopin Airport made use of the larger 3,690m runway and Andrzej Ilkow, Aerodrome Operations Safety Bureau Director, explained that “for almost the whole time of repair, there were no limitations and the work had no impact on airport operations”.

He continued: “The only disruptions to air traffic occurred during the work on the runway intersection in September 2010, when the airport had to be closed for larger planes. One of the biggest operations in Chopin Airport’s history, the work involved reshaping the longitudinal profile of the runway to remove the surface irregularity of up to 55cm in depth, which was too large in proportion to its length, leading to greater aircraft overloads and faster deterioration of runway pavement.”

To remedy this, 20,000 tonnes of bituminous mix were laid on the intersection over a period of just four days, requiring the input of almost 500 workers.

Ilkow added: “The repair has improved the load bearing capacity of the runways, which will allow for accommodating regular flights of the world’s largest aircraft. This is especially important for the airport, since as of April 2012, Chopin Airport will serve as the base of LOT Polish Airlines’ B787 Dreamliner planes.”
CAT III ILS
As well as the resurfacing and strengthening of the runway and the addition of new lighting, the investment in the airfield extends to the repair of some sections of the taxiways. The airport is also in the middle of the reconstruction of Apron 3, and this project is due to be complete by the end of November. Also underway is the development of a new centralised fuel infrastructure, for which the tender process for the operator of the system began in September.
Ilków continued: “We are also preparing for the introduction of CAT III ILS. The Polish Air Navigation Services Agency will install the appropriate equipment and after the trials, we will officially become a Category III airport.”
Currently, Warsaw Chopin is the only CAT II ILS airport in Poland, but the upgrade to CAT III will allow the airport to safely receive aircraft in even the most difficult weather conditions.

Long-term plan
Next summer, Poland will co-host the EURO 2012 European football championships and, although this will result in a sharp increase in passenger traffic in June and July, the current developments were always included in the airport’s long-term development strategy. According to UEFA forecasts, during the four-week tournament, Warsaw Chopin Airport can expect more than 100,000 additional passengers.

“Right from the start, UEFA officials declared that Warsaw Chopin Airport needed only small improvements to comply with tournament requirements, so it wasn’t necessary to take up any investments specifically for the championships. All current construction and repair projects are part of a long-term airport development programme, aimed at raising passenger service and air traffic handling standards in general,” Ilków said.

While an external project, which will see a rail extension provide easier access from the airport to the city centre, is set to be completed in March 2012, the airport itself has recently finalised various other projects, including the Terminal A extension and the construction of the Terminal A access roads network.

Roadgrip Ltd has recently used the TrackJet system at London Heathrow, London Stansted, Dublin and Manchester airports.

TRACKJET MAKES MILLIONAIREs
The English service and contracting company Roadgrip Ltd. recently cleaned its millionth square metre with the TrackJet system. A huge variety of different and challenging jobs were carried out to reach this milestone, including: London Heathrow Airport (paint removal); London Stansted Airport (rubber removal); Dublin Airport (paint removal); and Manchester Airport (rubber removal and paint removal). Other projects also undertaken include Silverstone F1 GP; RAF Lakenheath, and Glasgow Prestwick International Airport.

“The TrackJet System continues to provide a cost-effective, and a reliable system for rubber removal, paint removal and pavement retexturing,” said Richard Powell, commercial director, Roadgrip Ltd. “Trackjet’s real benefit is that whilst the evenness of treatment is controlled by the computer, our engineers are able to control the speed, rotation and pressure to deliver the appropriate degree of treatment in any given situation. We are able therefore to provide consistent surface treatment without damaging the substrate, effectively extending the life of our clients’ assets.”

AIRFIELD LIGHTS: TESTING WITH GERMAN HIGH-TECH
In the constantly growing cargo sector, Cologne Airport is Germany’s number two. Aircraft land and take-off within minutes of each other around the clock. Over 10,000 lights must be tested on-ground during continuous operation and replaced if needed. Maintenance specialist Jürgen Rader, responsible for the technical safety of all visual taxiing and landing aids in Cologne, has to schedule safe staff access to the runway for “target maintenance.”
In order to guarantee consistently good results and compliance with ICAO Annex 14, Rader’s department decided on DALMAS, the patented measuring system of the Dortmund company DeWitec. Since 2009, DALMAS has been used successfully to the complete satisfaction of the operator; it tests and documents all relevant visual taxing and landing aids in the runway and taxiway area. Decisive was the fact that this is the only tool that measures reliably, not only at dawn or twilight, but during any light, and can therefore be used during low activity midday hours.

In order to guarantee consistently good results and compliance with ICAO Annex 14, Cologne Airport decided on DALMAS, the patented measuring system of the Dortmunder company DeWitec.
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ICAo circular 329 has been developed to establish a conceptual understanding of the friction issues and recommends a holistic approach to the reporting of the pavement surface friction characteristics.

ICAo circular 329 has been developed to establish a conceptual understanding of the friction issues and recommends a holistic approach to the reporting of the pavement surface friction characteristics. As the task force seeks to harmonise runway friction standards as far as possible, it will closely monitor the work of the Easa (European Aviation Safety Agency) Runway Friction Characteristics Measurement and Aircraft Braking (RuFAB) project. The results of other regional initiatives, such as the US FAA (Federal Aviation Administration) Takeoff and Landing Performance Assessment – Aviation Rulemaking Committee (TALPA-ARC) project, will also be considered when developing global provisions for use in the 190 contracting States of Icao.

“The task force will continue to develop and harmonise worldwide provisions and procedures for the assessment and reporting of runway surface conditions, including a standard reporting format and taxonomy,” Cheong said. “There is an urgent need to report runway state conditions in a standardised manner that will enable flight crews to use this information to determine, as accurately as possible, aircraft performance for takeoff and landing. runway condition reporting should use terminologies and values that can be utilised in conjunction with the aircraft performance charts...”

The task force proposed a number of amendments to the existing high-level standards and recommended practices (SARPs) in several ICAO Annexes related to runway surface friction and contaminants,” Cheong explained.

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Circular 329 on Runway Surface Friction Condition Assessment, Measurement and Reporting was released earlier this year as a result of a joint effort by regulators, airports, airlines, and pilots associations, as well as aircraft manufacturers. Ryan Ghee discussed the contents of the Circular with Joseph Cheong, technical officer, Aerodromes Section, Air Navigation Bureau, International Civil Aviation Organization (ICAO).

Dynamatest’s friction solution

The Dynamatest 6875 Runway Friction Tester (RFT) is designed for both functional (maintenance) and operational testing to evaluate surface friction changes. Operational friction testing can be performed during such adverse weather as heavy rain, ice, slush or snow, with data reporting in both metric and US units. The 6875 meets all of the FAA and ICAO specifications for friction measuring devices (CFME).

The RFT includes the industry’s largest 1,000 litre (250 US gallon) built-in, aluminium, baffled water tank, positive displacement water pump and ASTM laminar flow water nozzle for self wetting testing of up to 11,000m+ (36,000ft+) of runway without refilling. Larger water tank sizes are available on request. For airports in winter environments, the RFT comes with four-wheel drive. The test gear in the RFT does not require changing the vehicle manufacturer’s axles and preserves the factory warranty.

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New, FAA proposes amending of FAR 139.305 to require airports to establish and implement a runway friction testing program. Become certified as a Runway Friction Safety Inspector.

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supply by the manufacturers. This commonality of terminologies and values is designed for use by the various stakeholders in the value chain. These stakeholders include the aircraft manufacturers who develop the performance tables; the aerodromes personnel who evaluate and report the runway conditions; the air traffic controllers and aeronautical information specialists who transmit the data; and the pilots and flight operations officers/flight dispatchers who apply the data.

**Common understanding**

While the work of the Task Force, as well as that of the likes of EASA and the FAA, has already laid the foundations for a harmonised approach to runway friction standards, Cheong explained that there is still work to be done. For instance, there is a pressing need, he said, to develop the necessary tools required for the reduction of runway excursion risk factors associated with surface contamination.

**Cheong: “The Task Force proposed a number of amendments to the existing high-level SARPs in several ICAO Annexes related to runway surface friction and contaminants.”**

**ASFT WEATHER SYSTEM**

Every day millions of people in 52 countries around the world lead a safer life on the road or at the airport due to ASFT products. Sweden-based ASFT is a leading developer and manufacturer of Continuous Friction Measuring Equipment (CFME), and provider of cutting-edge ITS and Road/Runway Weather Information System (RWIS).

ASFT develops and provides IT systems and products for surveying surface and weather-condition at airports. The products include computerised technology for monitoring factors such as friction, freezing points, early ice warning-systems, precipitation, ground frost, ice deposit growth, and camera-surveillance systems among others. The objective for measuring friction and other variables is to serve as a basis for decisions in order to make the correct maintenance and operational assessments at the right time and place. The ultimate objective is to achieve acceptable road or runway conditions for vehicles to travel safely.

The technology is purpose-built for stationary or mobile use. Fixed information systems provide continuous sampling of values and monitoring of changes over time; vehicle-mounted sensors provide a mobile information centre to have complete coverage of an entire infrastructure to sense factors such as friction, atmospheric conditions, pavement temperature, surface condition, surface freezing point etc.; and the mobile system provides real-time data for maintenance and operational decisions and supplements information from fixed information systems.

**IFPA INFORMS AND EDUCATES ON FRICTION TESTING**

The International Friction Pavement Association (IFPA) is the leading membership organisation for individuals whose primary business involves the development and standardisation of friction pavement evaluations and techniques. Established in 2006, IFPA serves as a community that connects members internationally, providing valuable information, education and resources to its members.

IFPA conducts field testing on its Thomas J. Yager Research and Test Facility, a 1,500-foot runway located at the Hernando County Airport Industrial Park in Brooksville, Florida. IFPA researches the varying friction properties of the pavement types on its track and shares its findings with the agencies so they may be considered in future airport runway safety standards. IFPA certifies individuals as ‘Airport Safety Inspectors’ who successfully complete a three-day friction programme and evaluation.

“The science of measuring, assessing and reporting runway surface friction characteristics, and to its wider remit of surface contamination, is often fraught with uncertainties,” he said. “Hitherto, there are no internationally agreed methods to assess the runway surface friction characteristics under all conditions and to correlate such results to the operational aircraft braking performance. There are inherent weaknesses in existing reporting formats as means of transmitting safety critical information to pilots. Therefore, there is a need for a common understanding of the definitions and processes related to reporting, including the development of a global reporting format using standardised terms for operational purposes.”

**FINDLAY IRVINE SUPPLIES 500TH GRIPTESTER**

Four new GripTester machines, designed and manufactured by Findlay Irvine Ltd., will be making road surfaces in Scotland safer, more durable and less prone to maintenance roadworks. The new GripTester machines automatically measure the ‘grip’ of the road surface, collate the data and provide it in clear, graphic reports and displays. They follow the same design principals as those used on airport runways worldwide – where an accident can have catastrophic consequences.

The new GripTesters – numbers 500 to 503 – will be operated by contractors looking after the four highways regions of Scotland. Findlay Irvine Managing Director Colin Findlay said: “It has been estimated that each fatal accident on our roads can cost about £1.5 million – and that’s not taking into account all the emotional trauma. By checking on the skid risk, and taking remedial action, Scotland’s roads will be significantly safer.”

Findlay Irvine has been developing GripTesters for all surfaces for more than 25 years for airports and highways. On airport runways they are able to assess the effects of rubber building up on the surface after aircraft land and take-off, which creates a dangerous risk of planes skidding off the runway when wet if not removed.
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RECOGNISING THE IMPORTANCE OF AIRPORT WAYFINDING

A combination of simplicity and innovation is key to providing an intuitive wayfinding process for the passenger, and airports are now complementing permanent signage with the latest smartphone technology to provide the best possible passenger experience. **Ryan Ghee** reports.

**Intuitive wayfinding** gives the passenger more control over their journey and this in turn results in direct benefits not just for the passenger themselves, but also for the airport. For the traveller, simply knowing where they need to be and how to get there gives them more personal control over their journey. For the airport, having a passenger who is in control of their journey can only be positive, and as well as increased satisfaction levels, secondary commercial benefits can also be reaped.

Recognising the benefits of simplified wayfinding, Aéroports de Paris has recently introduced the ‘My Way Aéroports de Paris’ smartphone application. This ‘app’ covers an area of 200,000sqm and currently covers Paris-Charles de Gaulle’s Terminals 2e and 2F, the TGV railway station and the Premium sector of the 2e and 2F car parks.

Divided into four sections – Routes, Leisure, Services and Favourites – it allows passengers to determine their position in the terminal; obtain directions to various useful destinations; obtain information about the location of leisure and services areas; and save past searches in the Favourites section for future reference. The app has so far proved to be successful among users and Aéroports de Paris now has plans to expand the service to all of Paris-CDG, as well as Paris Orly, next summer. It will then be integrated into the overall ‘My Airport’ application.

“With this app, you know where you are in the airport, it includes points of interest, it’s totally intuitive, and it can direct you right to your boarding gate,” explained Olivier Tarneaud, Head of Marketing, Aéroports de Paris.

**Permanent signage**

Aéroports de Paris is not the only operator to offer such a service and earlier this year Copenhagen Airport introduced an app featuring ‘augmented reality’, which allows travellers to use their smartphone

**Tarneaud:**

“Technology will never replace humans and it will never replace signage in an airport. It’s an additional option for people who enjoy technology.”

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camera to determine how far they are from a certain point in the airport and how to get there.

However, while such technologies cater to the demands of the modern traveller, Tarneaud explained that permanent signage still remains key to providing a simple wayfinding experience. “Mobile applications may be the future of wayfinding but they will never replace permanent signage,” he said. “In society, you have three large segments. There are people that are total technology addicts; people who are the very opposite and don’t like to use new technologies; and then the people in the middle. Technology will never replace humans and it will never replace signage in an airport. It’s an additional option for people who enjoy technology.”

Further benefits
As well as increased passenger satisfaction, for the airport, effective signage and wayfinding can also lend itself to commercial benefits. “When you are in control of the information you need, it gives you additional time in the airport and you’re then much more likely to spend time in the retail area,” Tarneaud said. Furthermore, in the near future, geolocation technology will also allow smartphone users to receive promotional offers, specifically tailored to the passenger and their location within the terminal. This interactive and personal service, coupled with effectual permanent signage, can help to ensure a simple journey through the terminal building, with additional benefits for both the passenger and the airport.

MERSON SIGNS REACHES NATIONAL BUSINESS FINALS

Merson Signs has been selected as one of only six companies from Scotland and Northern Ireland who will progress to the Regional Finals of a national business initiative run by HSBC and supported by The Telegraph.

Business Thinking is HSBC’s initiative to find and reward the UK’s best business thinkers, and to enable businesses to exchange ideas, create new contacts and of course, challenge their thinking.

As regional finalists, representatives from Merson will go to Paris to take part in a “Thought Exchange” to meet other companies and industry contacts and find out about international business development opportunities. As a business that has developed significantly in the international market over the past 18 months, the management jumped at the chance to be involved in a competition with a strong international focus.

Merson’s Sales & Marketing Director, Gavin McMurray, said: “A major attraction of entering was to get to talk to other businesses, both in Britain and in France. That opportunity to network will allow us to share and learn business insight and be exposed to different business ideas in the European and wider international market.” As well as setting up an office in Riyadh in 2010 to manage the growing number of projects won in the Middle East, Merson Signs has also grown domestically.

On return to the UK, the Regional Finalists will pitch to a panel of judges, who will select two Regional Winners per region. The Regional Winners will then be invited to attend HSBC’s prestigious International Insights event, where the overall winner of Business Thinking 2011 will be revealed.

Among the major airports that Merson Signs has recently developed signage schemes for are London Heathrow’s T5, Gatwick Airport, Abu Dhabi’s Midfield Terminal Complex and Muscat Airport.

HRS HELPING REDUCE PASSENGER QUEUES

Airports are constantly striving to create an improved passenger experience and are increasingly looking to innovation and technology for solutions. Like all things, learning how to improve infrastructural efficiencies such as resource management, while devising ways to reduce queues and provide more time in dwell and retail areas is easy when experienced practitioners are on-hand.

Human Recognition Systems (HRS), a leading biometrics company, has been working with airports for nearly 10 years to advance the technology to achieve these objectives. This includes six of the top 10 UK airports, and in May this year HRS completed a major deployment and world first.

MFlow Journey uses passive facial recognition to help measure and manage the efficient flow of passengers throughout an airport. It’s designed to dramatically reduce passengers’ queue times by relaying queue analysis information to management who can then make informed decisions about when and where resource is required. “The technology helps the airport to become much more efficient on an operational level. On top of this, regulatory and service level agreements are much better supported,” explained Chief Executive Neil Norman.

“In turn,” he said, “the technology helps to keep passengers’ stress levels to a minimum. This directly delivers the outcomes that passengers consistently refer to during research – less waiting in queues and more time to relax.” MFlow Journey can also drive the display boards, which indicate the likely queue times to passengers in relation to the associated security lanes’ zones. The technology is configurable so it can be changed according to business needs.
AIRPORT INNOVATIONS

Allowing passengers to optimise the time spent in the terminal building is vital to ensuring passenger satisfaction and airport operators are increasingly embracing innovation to make the airport experience as relaxing as possible. Ryan Ghee reports.

SHEREMETYEVO INTERNATIONAL AIRPORT

Passengers travelling through Sheremetyevo International Airport can now rent new ‘Sleepboxes’, which include a bed, television, WiFi access and luggage storage space. The first Sleepbox was installed in the Aeroexpress Terminal at the airport in mid-August. Currently, one-, two- or three-bed Sleepboxes are available and passengers can rent them for anywhere between 30 minutes and several hours. Each unit also includes electricity sockets so that customers can charge their laptops and mobile phones before continuing with their journey. Luggage can be stored under the bed, general lighting and reading lamps are provided, and electric blinds are installed for privacy. Depending on the location, the Sleepbox can also be tailored to suit meet the demands of the airport and passenger, and can include matted film windows with changing transparency, mood lighting created by LED lamps with alternating light colours, a built-in media block, Wi-Fi router, alarm and intercom, safe deposit box and a built-in payment system with magnetic keys. In countries with a warm climate, the Sleepbox can also be installed outdoors.

GATWICK AND MANCHESTER AIRPORTS

Two major UK airports – Gatwick and Manchester – have this year introduced upgraded airport concierge services to simplify the passenger experience. The improved baggage services, which are provided by Excess Baggage Company (EBC), are in place in Gatwick Airport’s North Terminal and Manchester Airport’s Terminal 1, and further units are scheduled for Gatwick’s North and South Terminals, London Heathrow’s Terminals 4 and 5, as well as Manchester’s Terminal 2. EBC offers a portfolio of over 20 services, including Left Baggage Storage, Domestic Baggage Delivery and Lost and Found services, as well as Baggage Shipping, Security Bag Wrap and Travel Goods and Accessory Retail.

For many passengers, the airport experience is often viewed as a stressful necessity but many airports are now going beyond the call of duty to ensure that time spent in the terminal before or after a flight can be put to good use. Here, Airport Business rounds-up a selection of the latest innovations:
**MUNICH AIRPORT**

Munich Airport has introduced ‘napcabs’ to extend the level of comfort offered to passengers, allowing them to relax in private sleeping cabins, which can be rented in the departure and transit areas. Inside the cabin, passengers are presented with a variety of videos and music, as well as Internet access, or they can simply relax in the pleasant atmosphere created by specially installed lighting. To ensure ease of use, passengers can book napcabs by the hour, using a touchscreen booking system on the front of the cabin and swiping their credit card. Usage analysis suggests that the average customer uses the napcab for two to three hours. After each use, cleaning staff are automatically notified to tidy up the cabin and prepare fresh linen so that the napcab is quickly ready for the next customer. As well as helping to enhance the passenger experience, the revenue share model carries no financial risk to the airport, and the required space is simply rented by napcabs. Another benefit of the sleeping cabins, which offer a supplement to traditional airport hotels, is that they can be clustered at varying locations in close proximity to the lounges and they can utilise small areas, which are unsuitable for other retail offerings.

**LONDON HEATHROW**

Terminal 3 at London Heathrow is now home to a brand new No.1 Traveller Lounge, which includes private, en-suite pod-style accommodation, a travel spa, business centre and a mini cinema, in addition to the more traditional airport lounge offerings such as a fully-tended bar and freshly prepared food. The lounge opened this summer and also offers panoramic views of the airfield, as well as a quiet room and a games room for passengers to enjoy. Transfer passengers can make use of the en-suite bedrooms, while the travel spa offers massages, facials, manicures and pedicures.

John Holland-Kaye, commercial director, BAA, said: “We’re really excited about this new addition to Terminal 3. We believe it will make our passengers’ journeys better and in particular, it will benefit all of our connecting passengers who can unwind and freshen up ahead of the final leg of their journey.”

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The unveiling of the flagship No.1 Traveller Lounge at London Heathrow’s T3 follows the opening of similar lounges at Gatwick and Stansted airports.
PROVIDING A HIGH-LEVEL SERVICE TO PRMs

Since the introduction of EU Regulation 1107/2006 in July 2008, a spotlight has been cast on the rights of passengers with reduced mobility (PRMs). In April this year, the European Commission released its latest report on the functioning and effectiveness of the Regulation. Ryan Ghee reports.

The conclusion of the report suggested that the implementation of the Regulation has been positive overall, but there is still work to be done. The existence of a single legal framework has been the catalyst of significant improvement in the general level of service offered to PRMs and the report explained that this framework "appears sufficiently flexible to accommodate any necessary improvement without the need for a legislative process at this point".

On the back of the report, the Commission has proposed a number of axes of improvement within the existing framework. These concern the uniform interpretation of the Regulation; improving how the regulatory instruments work in practice; strengthening the efficacy of the penalties and their supervision by national authorities; and handling the issue of medical oxygen to encourage negotiations about a voluntary commitment among all parties concerning the use of medical oxygen on board.

Exceeding expectations

In order to ensure that they can provide a high-level of service to PRMs, airports tender out contracts to third party providers (as permitted under Article 8 of the Regulation) who take responsibility for ensuring that the service offered meets and surpasses the general requirements laid out in the Regulation. In this regard, many European airports are working with various vendors in this area. One such example can be found at London Heathrow, where OmniServ, a subsidiary of US-based AirServ Corporation, was last year awarded the five-year contract to provide PRM services for every commercial flight arriving and departing from the airport.

The employees of the companies who had previously provided the airport’s PRM services were transferred under TUPE (Transfer of Undertakings (Protection of Employment)) legislation into OmniServ and a detailed training process was embarked upon to ensure that all staff were fully prepared to offer the specialised level of service. “The aim of the company is based on excellent customer service to make the passengers’ transition through the airport as smooth and stress-free as possible,” said Ernie Patterson, chairman, OmniServ.

In accordance with Article 9 of the Regulation, the level of importance placed on providing a high-quality service to PRMs is further underlined by the service level agreements between the airport and the service company. Continuing with the case of London Heathrow and OmniServ, the agreement states: “For pre-booked departing passengers, upon arrival at the airport, once they have made themselves known: 95% of passengers should wait no longer than 10 minutes; 99.999% should wait no longer than 17 minutes.” For those who haven’t pre-booked, these figures stand at 15 and 20 minutes respectively.

To ensure that these targets are met, OmniServ, in collaboration with the Disney Institute, has developed its own tailored training packages. All employees have successfully completed the new training modules and as a consequence, AirCare, the new brand of OmniServ for the PRM contract at Heathrow, was launched in April. Each customer is also encouraged to fill out a customer care card to provide feedback on the service they have received, while members of staff who perform outstanding customer service are recognised through the Chairman’s ‘110% Club’ award.

Patterson added: “The training also includes the use of handheld devices, which track and log when a client has been transported safely to or from the aircraft. This helps to save time as an employee can be assigned a customer based on where they are within the terminal.”

This combination of a technological and training-based approach to increasing productivity is helping to ensure that PRMs transiting through London Heathrow receive a high-level and personal service, as per the terms of the EU Regulation. Overall, the European Commission’s view is that the implementation of this Regulation is overall satisfactory - a legislative revision is not necessary at this stage. However, ACI EUROPE has repeatedly informed the European Commission and National Enforcement Bodies about the need to clarify some aspects of Regulation 1107/2006, mainly related to the definition of PRM, the importance of pre-notification, the PRM charge and the handling of the mobility equipment. It has welcomed the European Commission’s announced plan to propose Guidelines promoting a uniform interpretation of the Regulation, in January 2012.
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The recent decision to approve the construction of a third runway at Munich Airport is significant not just for the airport itself, but also for the overall German aviation infrastructure. Dr Michael Kerkloh, Munich Airport CEO, outlined his views to Ryan Ghee.

**MUNICH’S THIRD RUNWAY TO BRING WIDESPREAD BENEFITS**

The approval granted by the District Government of Upper Bavaria is perhaps the most noteworthy development at Munich Airport since its relocation in 1992. Since the opening of the new hub almost 20 years ago, passenger traffic has increased three-fold to almost 35 million in 2010, and this growth is continuing, as displayed by a year-on-year increase of +13% for the first six months of this year.

The airport’s forecast indicates that by 2020, total air traffic movements (ATMs) will reach 536,000 – rising from the current figure of 390,000 – adding further justification to the approval of a new runway, which is expected to be complete by the end of 2015.

“With the capacity limitations of the two-runway system, we are already facing the problem of struggling to meet the demand for additional flights,” Kerkloh explained. “The current capacity of 90 schedulable take-offs and landings per hour, which is actually an outstanding performance for a two-runway system, is already stretched to the utmost during peak traffic periods and we cannot offer any slots for additional take-offs and landings.”

As a mark of the airport’s dedication to ensuring the most efficient operations, Munich Airport was the first to adopt Airport Collaborative Decision Making (A-CDM) when the project was launched in 2004, ahead of the full implementation in June 2007. The aim of the A-CDM Action Plan – which is driven by a collaboration between ACI EUROPE, EUROCONTROL and CANSO – is to improve the operational efficiency of all airport partners by reducing delays, streamlining the predictability of events during the progress of a flight and optimising the utilisation of resources. More than 30 airports are already engaged in the project.

Munich Airport’s A-CDM implementation has also contributed to its certification under Airport Carbon Accreditation at the ‘Optimisation’ level. Having successfully engaged third parties on the airport campus to reduce their carbon footprint, Munich is the first German airport to achieve this level under the accreditation programme.

**Increasing runway capacity**

At present, Munich Airport shares a significant portion of all long-haul flights to and from Germany with Frankfurt Airport, but without any expansion, catering for additional slots or capacity is impractical. “Due to the very limited opportunities for airlines to overcome these bottlenecks by using larger aircraft or rescheduling flights, they are simply unable to launch many potential new connections to and from Munich,” Kerkloh said.

The addition of a third runway, however, will increase the capacity at Munich Airport to 120 schedulable take-offs and landings per hour. Kerkloh continued: “As a result, the planned capacity expansion project will give Munich Airport, as well as

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**KEY FACTS & FIGURES**

**Annual Passengers:** 34.7 million  
**Annual ATMs:** 390,000  
**Maximum movements per hour:** 90  
**Hub for:** Lufthansa, airberlin, Augsburg Airways  
**Number of airlines served:** 100  
**Number of destinations served:** 225 (20 domestic, 156 European, 49 Intercontinental)  
**Number of stands:** 172  
**Number of employees:** Approx. 30,000  
**Number of companies on the airport site:** Approx. 500

*based on 2010 full-year figures
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“In the year 2011, we are expecting more than 37 million passengers (an increase of more than +7% compared to 2010). The forecast for the year 2025 is about 58.2 million passengers at Munich Airport.”

Even though the airport is currently limited in terms of both terminal and runway capacity, the high level of its performance is reflected by the fact that it was this year recognised in the European section of the World Airport Awards, which are based on the views of more than 11 million travellers from over 100 countries.

Economic importance

Considering the export-driven nature of Germany’s economy, the addition of the third runway is vital also to ensure that the infrastructure is in place to cater for the extension of international business links.

Kerkloh explained: “The Bavarian companies that rank among the global players in their industries keep the export quota of the economy at approximately 50%. Bavaria is among Europe’s top-performing regions and has an excellent reputation – as a globally respected research and development location, a hotspot for leading-edge technologies, an attractive trade fair venue and a highly efficient logistics hub.

“Moreover, Bavaria is number one among German states for tourism. To secure our future growth and prosperity and ensure that we are able to keep generating new jobs, we must maintain and expand our international business relationships. This will require an airport that is equipped to handle the demands of the future.”

T2 Satellite

As part of this drive to ensure that Munich Airport can satisfy these future demands, Flughafen München GmbH (FMG), the airport’s operator, is also investing in a new Terminal 2 Satellite facility, along with the German carrier Lufthansa. FMG is footing 60% of the total €850 million cost, while the airline is covering the remaining 40%.

Terminal 2 itself only became operational in June 2003 but by the end of this year, it is expected to handle its capacity of 25 million passengers. Having been originally designed as a hub terminal for Lufthansa and its Star Alliance partners, the addition of the new satellite facility is a natural progression of the strong relationship between airport and airline.

The 123,000sqm facility will be directly linked to Terminal 2 and is due to become operational in 2015. “This will increase the annual passenger capacity of Munich Airport by 11 million to more than 50 million,” Kerkloh said. “At a later date, through a second phase of this building, we will be able to create space for an additional 6 million passengers per year.

“With the first development phase alone, we will gain 27 new gate positions for aircraft, allowing passengers to move from the terminal to the aircraft or vice versa, without having to board a bus. As a result, in the area of Terminal 2, we will have more than 50 aircraft park positions directly adjacent to the building. This will raise the quality of our service in this regard to a level that can stand up to comparisons with other major European hubs.”

The expansion of both terminal capacity and ATM capabilities is expected to further cement Munich Airport’s status as a key growth market for the Star Alliance in Europe. In fact, Lufthansa alone has plans to introduce 155 new aircraft into service by 2017 thanks to investment totalling €15 billion. This, combined with positive traffic forecasts, a new satellite facility, and the addition of a third runway, makes for good reading not just for Munich Airport, but for Germany’s aviation infrastructure as a whole and, in turn, the wider economy.
Aljac Fuelling Components Limited, a company supplying aviation fuel handling equipment on a global scale, and Hammonds Technical Services, a leading additive injection system manufacturer, aims at putting an end to the need for the sourcing of clean non-corrosive fuels. Thus, when approached by the charity ‘Vulcan To The Sky’, which is dedicated to maintaining and running the only Vulcan Bomber Jet still flying, Aljac and Hammonds were prompt to help.

Maintaining a Vulcan – like any historic jet – in the air is not an easy task, especially for a charity that relies heavily on the public’s support. Due to the high amounts of sulphur in the widely-used Jet a1 fuel, the kerosene slowly corrodes the internal silver components. This results in the layers being stripped off, eventually leading to equipment failure. Thus, when confronted with this urgent and re-occurring corrosion problem, which endangered the Vulcan from flying, the dedicated engineers from ‘Vulcan To The Sky’ approached Aljac Fuelling Components Limited and one of their major US distributors, Hammonds Technical Services.

An alternative to relying on MOD sites to refuel their jet with F34 fuel was sought, and found. Aljac and Hammonds sponsored a mobile additive injection unit, which has the ability to inject and mix the chemicals needed to create F34 fuel on site.

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ProVision ATD addresses passenger privacy concerns by eliminating all personal images. After a passenger is scanned, advanced software processes the data directly. This automatic detection capability is also available through a field upgrade to existing ProVision systems.

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Besides ADB lights’ proven advantage in terms of reliability and maintenance costs, ADB also helps airports to reduce CO₂ emissions and save costs. Indeed, equipping a 3000m CAT III runway with LED lights could save the airport 15-20 tonnes of CO₂ emissions annually, even when operated at reduced intensity.

Thus, ADB helps airports not only to comply with new environmental regulations, but also provides the most economical solution for airports. With its worldwide presence and experience of over more than 60 years, ADB aims at setting new benchmark standards in safety, performance, quality, and customer service.

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Kilfrost’s solutions have environmentally friendly credentials. Its Type I, II and IV fluids are developed from a Bio-PDO glycol base, which comes from a renewable and sustainable raw material, creating a significantly decreased carbon footprint. The hold over performance of the solutions minimises the need for reapplication of de/anti-icing fluids, saving valuable resources in terms of time and money for aviation operators.

Through its partnership relationships with airlines and airports, embracing integrated supply chain management for the delivery of de/anti-icing solutions, Kilfrost helps keep the global economy moving through the deepest freeze.

PRESERVING RUNWAY AND TAXIWAY ASPHALT

ASI Solutions aims at extending the life of asphalt airport runways and taxiways by offering a sustainable and cost-effective alternative to resurfacing. Besides delaying the need for resurfacing, advantages also include a significant cost-reduction, fewer operational disruptions associated with re-surfacing, as well as a decrease in CO₂ emissions.

In addition to Rhinopatch, a pothole repair process, ASI developed Rhinophalt for asphalt preservation. Following a cold spray application during the day or at night, the material is absorbed rapidly by the asphalt or macadam. The sprayed surfaces can be re-opened to traffic within only two to three hours.

The preservation delays the need for a costly resurfacing extensively, and as it is also usable on nearly new pavements, its effectiveness is further increased. In order to extend the useful life of the pavement even further, the process can be repeated every four to seven years, provided the surface continues to comply with the required levels of skid resistance.

Growing continuously since 1993, ASI Solutions’ products continue to convince customers globally; the most recent include Iceland’s Keflavik International Airport and the Royal Air Force’s base in Northolt, UK. In Europe, ASI Solutions’ partners include the Italian pavement consultancy RoDeCo, and German surfacing construction company Kutter.

In addition to Rhinopatch, a pothole repair process, ASI developed Rhinophalt for asphalt preservation.

In addition to Rhinopatch, a pothole repair process, ASI developed Rhinophalt for asphalt preservation.
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CEM’s leading edge technology includes the S3030 Portable handheld card reader, Ethernet based IP readers, PoE+ (Power over Ethernet Plus) door control and fully integrated biometric security solutions. CEM was indeed first to introduce a portable hand-held reader to the market and is continually developing solutions to assist airports with changes in operations and legislation.

CEM secured airports worldwide include Budapest, Keflavik, Hong Kong, Vancouver, all BAA airports and most recently Indira Gandhi Delhi, Terminal 3 for which CEM was awarded ‘Best Airport Security System’ in the Emerging Market Awards 2011.

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Cavotec manufactures innovative system integration of power, fuel and air supply between fixed and mobile equipment in the airports, ports and maritime, mining and tunnelling, and general industry sectors.

The company’s Airports Market Unit is a complete ground support systems integrator for the global airports sector. Working closely with airport operators, airlines and aircraft manufacturers, Cavotec develops a diverse range of advanced ground support equipment (GSE).

Cavotec also manufactures 400Hz and fuelling systems and wet service services, tunnel systems, PCA/PCAir systems, aircraft connectors and tow-bars, cable coilers, crocodile systems and battery-driven caddies.

Cavotec’s Airports Market Unit is a complete ground support systems integrator for the global airports sector.

Cavotec Meyerinck supplies fuel and liquid control systems for airports and the food and beverage and chemical and petro-chemical industries; Cavotec Fladung manufactures in- and above-ground support systems; Cavotec Dabico has been at the forefront of in-ground fuel delivery systems for aircraft for some forty years; and Cavotec INET supplies 50/60-400 Hz power conversion, pre-conditioned air and power generation systems.

In May 1947, Marcel Boschung Senior laid the foundation of the company bearing his name, which over the course of the last 60 years has become one of the leading manufacturers of machinery and equipment used in the field of cleaning and maintaining of airports, roads and municipalities, with branch companies in Germany, France, Austria, China and USA. Under the trade name SCM (Surface Condition Management), the Boschung Group is the only company to supply the entire range of maintenance equipment for working surfaces.

With its 350 employees, the Boschung Group manufactures a diversity of equipment for airport maintenance activities. Products include, among others, the special and extremely economical all-year cleaning machines for airport areas: towed runway-sweeper Jetbroom RWY-T, spreaders and de-icers for every possible application and combination, snow blower B4 and snow booster B6, multi-purpose vehicle Pony, and sweepers in many sizes.

With the establishment of Boschung Mecatronic Ltd. in 1978 – producer of electronic and electro-mechanical winter equipment - the activities of the Boschung Group have been extended by specialising in early ice warning systems and automatic thawing agent spray systems, as well as the BORRMA-web System.

With its 350 employees, the Boschung Group manufactures a diversity of equipment for airport maintenance activities.
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Our over the counter Left Luggage systems maximise locker revenues 3 times.

Excess Baggage Company has provided baggage services to the travelling public for over 25 years. The company has developed over this period a wide range of in-terminal passenger baggage systems, for both landside and airside, which maximise terminal operator revenues.

Tel: +44 20 3468 8549 • Email: retail.sales@excess-baggage.com