INTERVIEW
Ad Rutten,
Executive Vice President & COO,
Schiphol Group and
ACI EUROPE President

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Industry challenges discussed

BUDAPEST CHARTER
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EDITORIAL

FROM FIRE-FIGHTING TO FUTURE-PROOFING

BY OLIVIER JANKOVEC, DIRECTOR GENERAL, ACI EUROPE

With passenger traffic figures showing a stronger and more dynamic recovery, the early months of 2011 finally delivered the positive signals that most of Europe’s airports had been waiting for all through 2010.

However, despite much improved consumer confidence and businesses enjoying strong demand from new economic powerhouses in Asia and South America, the short-term outlook for European aviation still remains uncertain. As I write these lines, one can only speculate over the outcome and global impact of the dramatic events that have brought Japan – the world’s 3rd largest economy – to a standstill. Renewed volatility in oil prices continues to be a major concern, on the back of geo-political instability in North Africa and the Middle East. Last but not least, Europe’s ability to decisively step away from sovereign debt crises and boost domestic demand will also be key factors shaping our business in the coming months.

For reassuring and brighter prospects, looking at a more distant future seems to be a safer bet. The Long-Term Air Traffic Forecast released by EUROCONTROL in February is indeed comforting when it comes to future demand for air transport. This authoritative report shows that, despite losing 3 years of growth with the global crisis, air traffic in Europe is still expected to – nearly – double by 2030. However, the good news ends there, as taking into account existing plans to develop airport facilities and the fact that High Speed Rail will only absorb a fraction (0.5%) of demand for air transport, the report also confirms previous findings: Europe continues to face an airport capacity crunch.

This EUROCONTROL report should be a wake-up call for European governments. In several countries, the level of support for airport expansion is at an all-time low – in sharp contrast to what happens elsewhere in the world, in particular in the Middle East, China and India. As getting our licence to grow has never been more difficult, the award for the worst aviation policy (or non-policy as it happens) undoubtedly goes to the United Kingdom. Across the Channel, it is all about ignoring the pressing needs of businesses and citizens for efficient mobility by denying badly needed airport expansion. Coupled with the highest level of aviation tax on record, the UK government is actively jeopardising the competitive position of UK plc.

Airports are prime assets when it comes to fostering economic growth and reinforcing social cohesion. But to make the most of our potential, we need policies that are truly focused on the long-term and which ensure that general interests prevail over vested ones. These are essential principles – and not just when looking at capacity planning.

They should also guide national authorities at a time when they need to finalise the implementation of the EU Directive on airport charges.

The EUROCONTROL report is also a reminder for the European Commission that airport capacity needs to be addressed more forcefully at EU level. The impact of the capacity crunch will be felt throughout the European aviation network, well beyond national borders. It directly threatens the success of the Single European Sky – a top priority for the EU transport policy. Increasing capacity in the air will be utterly pointless without matching capacity on the ground, and that is why there is an urgent need to align ATM and airport capacity objectives.

ACI EUROPE has been working tirelessly in that direction since 2007, as part of a more effective integration of airports into the ATM network. As reported in this publication, the ‘Budapest Charter’ concluding the recent EU Conference on Single European Sky pays recognition to the challenge of airport capacity and paves the way for more decisive action at European level. Yet, concrete follow-up rests with the European Commission.

This will require much more than simply proposing an EU regulation to standardise airport capacity measurements – a weak and futile move. It will require a better understanding of ground operations, including the recognition of limits inherent to capacity constraints and the need to address our lack of control over the various activities taking place within the airport perimeter. Indeed, with a better understanding, we could have avoided some rather prejudiced and unjustified statements during the extreme winter conditions of last December.

Most of all, resolving the airport capacity crunch will require courage and leadership that tends to be sorely lacking at national level. This means the European Commission must be visionary and show lasting commitment. Its forthcoming White Paper on the Future of Transport, due to be adopted in the coming days, should be the opportunity to start showcasing vision.
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Amsterdam Airport Schiphol’s success in 2010 is indicative of the return to growth of Europe’s aviation sector. The airport saw passenger numbers increase by +3.8% to 45.3 million passengers, while cargo volumes grew by +16% to 1.5 million tonnes. Those figures would actually have been even higher were it not for the impact of external shocks, such as last April’s volcanic ash cloud. The positive trend is set to continue this year. “We forecast growth of 4% to 7% in 2011, in terms of both passengers and cargo. This will be driven by airline optimisation and also the launch of new services by the airlines,” said Rutten. “For the first time since the crisis began, we will also see an increase in aircraft movements again, of 4%.”

Recently released figures for January 2011 are promising and suggest this confidence is well-founded. Amsterdam Airport Schiphol’s dynamic growth has continued; while overall passenger traffic at Europe’s airports rose by +7.5% in January, Schiphol saw growth of +10.8% to 3.26 million. Similarly, while overall freight traffic across Europe increased by +10.3% in January, Schiphol enjoyed impressive growth of +14.3% to 122,254 tonnes.

ENHANCING THE PASSENGER EXPERIENCE
Schiphol retains its one-terminal concept to ensure it remains passenger-friendly and easy to navigate. Its use of innovation to enhance the passenger experience saw the launch of the Innovative Gate in June 2010. The gate, located at Pier G, was entirely redesigned and refitted, with an emphasis on the revolutionary use of elements such as lighting, design and dynamic information services to create a pleasant gate experience. Cathay Pacific was the first carrier to use the gate, which has full airline branding capabilities; in December 2010, it was announced that Singapore Airlines, United Airlines and ArkeFly – a Dutch charter carrier – would also start using the ultra-modern gate.

“We worked with Philips on the launch of Innovative Gate. Philips added new lighting, which can be changed depending on the brand colours of the airline using the gate. Lighting can also be used to change the ambience at the gate; for example, the lighting can be turned up when the aircraft is ready for boarding to encourage action,” commented Rutten. “Passenger satisfaction is up and the feedback has been positive. We will take learning from this project and apply it to our future expansion.”

Another key area of innovation is the upgrade of the airport’s baggage handling system, which is currently in the last phase of development and will be implementing it for all flights in regular service by the end of the year.

Rutten stressed that capacity is a high priority in terms of both runways and terminal infrastructure. ACI EUROPE has long warned that Europe is facing an airport capacity crunch, with air traffic forecast to double by 2030. “This is an issue that requires a lot of investment,” said Rutten.
scheduled to be completed at the end of 2012. The €800 million initiative – currently the airport’s largest investment programme – is known as ’70MB’ – a reference to the capacity of 70 million bags per year that it will provide. The new baggage system will allow Schiphol to maintain and improve its hub operation, optimising the flow of transfer baggage, and as such the project is being developed in collaboration with KLM.

Rutten explained that there will be a high level of automation. “We are working within a minimum transfer window of 40 minutes for intra-EU traffic and 50 minutes for intercontinental traffic. The hourly rate will go up to 9,000 transfer bags per hour,” he said.

In 2005, Schiphol became the first European airport to test a baggage robot designed to load containers and trolleys. An improved version was installed in 2008, with six robots set to be up and running in the new South baggage hall, which will become operational in October 2011. These six robots will together load 60% of all baggage items. According to Rutten, the mechanical unloading system constitutes another crucial innovation. The system picks up the containers, tips and empties them. “From the point of starting the unloading process with a ramp snake, in theory a bag can transfer at Schiphol without anyone handling it manually. This means human hands will only be needed to operate the control panel. Baggage handling staff will be controlling the process rather than doing any heavy lifting,” he said.

The project will include expansion of three existing baggage halls D, E and South, and the construction of a high-speed mechanical conveyor system that will increase transfer baggage capacity by 50% from 6,000 to 9,000 per hour. The baggage storage facility will be increased from 4,000 to 8,700 bags. “The philosophy has changed from a ‘push’ to a ‘pull’ concept. If the transfer time is longer than an hour, baggage can be directed to the bag store. It is a different system from existing ones and a big advantage for us. At peak times, there will be lower pressure on the baggage handling system,” explained Rutten.

**TESTING GROUND FOR INNOVATION**

Schiphol is leading the way in terms of developing innovative applications to enhance airport sustainability. In 2010 it launched theGROUNDS, which is described as a knowledge cluster in which companies, government agencies and academic institutions will collaborate on tailor-made applications for Schiphol. The first organisations to join theGROUNDS are Delft University of Technology, the Netherlands Organisation for Applied Scientific Research (TNO), Wageningen University & Research Centre, and Imtech – a company specialising in ‘green’ technologies.

“We are in the final stage of the contract with our partners. theGROUNDS is located on an area of land adjacent to the airport where we can offer small start-up companies and students opportunities to work on sustainable projects,” explained Rutten.

The upgrade to Schiphol’s baggage handling system will be complete at the end of 2012. Rutten explained that there has been a change of philosophy from a ‘push’ to a ‘pull’ concept. “If the transfer time is longer than an hour, baggage can be directed to the bag store. It is a different system from existing ones and a big advantage for us. At peak times, there will be lower pressure on the baggage handling system.”

The airport saw passenger numbers increase by +3.8% to 45.3 million in 2010, while cargo volumes grew by +16% to 1.5 million tonnes. Those figures would actually have been even higher were it not for the impact of external shocks, such last April’s volcanic ash cloud. Growth of 4% to 7% is forecast in 2011, in terms of both passengers and cargo.
We are committed to self-service, convenience and shorter lines at the airport.

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Schiphol is seeking to develop further its successful microalgae pilot project in theGROU NDS. Microalgae produce oxygen, which degrades the glycol substance used to de-ice aircraft. The waste released from biodegradation will serve as food for the microalgae and the residual heat released from the buildings will provide the necessary heating for the microalgae. The purified water will ultimately be recycled and used in the airport’s operational processes. Combining the components of waste, water and heating in the airport’s processes will enable Schiphol to achieve sustainable water purification. “Our ambition is a full working algae plant by winter 2011/12. The algae produced is high quality,” said Rutten.

Schiphol has expressed the ambition to become carbon neutral in its own operations by 2012 and generate 20% of all its energy requirements sustainably by 2020. The airport is also striving to improve water quality. It is hoped that the innovative applications yielded by theGROUNDS will allow Schiphol to achieve these objectives ahead of schedule.

The airport has also purchased 20 electric vehicles, which will be delivered from mid-2011 to 2013 and is urging its subcontractors to similarly use environmentally friendly vehicles – the airport buses are compliant with Euro 5 emissions standards and the taxis are eco-friendly, for example.

ACI EUROPE and EUROCONTROL introduced the Airport Collaborative Decision Making (A-CDM) Action Plan in 2008 and last year CANSO entered the partnership. The central idea 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. Schiphol is one of 10 European airports committed to implementing Airport Collaborative Decision Making by the end of 2011.

Rutten: “We forecast growth of 4% to 7% in 2011, in terms of both passengers and cargo. This will be driven by airline optimisation and also the launch of new services by the airlines. For the first time since the crisis began, we will also see an increase in aircraft movements again, of 4%.”

“We are developing A-CDM at Schiphol in cooperation with KLM and air traffic control. We see the benefits in the process – by the end of the year, we will be implementing A-CDM for all flights in regular service. It will result in shorter taxi times and waiting times for aircraft. We will calculate fuel savings and measure the reduction in delays. It will enable the optimal use of airline fleets,” explained Rutten.

As we were just going to press, we also received word of Amsterdam Airport Schiphol becoming Airport Carbon Accredited at the ‘Optimisation’ level of the programme – the highest level possible without carbon offsetting.
LAGs DEADLINE

ACI EUROPE has identified four key challenges facing airports: Capacity, Environment, Connectivity and Security. The imminent 29 April deadline for the first phase lifting of Liquids, Aerosols & Gels (LAGs) restrictions is potentially disastrous, according to Rutten. “I am against implementing the rules on LAGs at this time, as there are currently no Type D machines that can help us with this. The aim is that passengers will be able to keep LAGs in their hand baggage, but technical trials with Type C machines in a testing environment generally produced a 20-30% false alarm rate, which is unacceptable with the volume of passengers using Europe’s hub airports every day. That level of misreadings would be a disaster,” he said.

Furthermore, there are currently only three countries – Croatia, Singapore and Malaysia – with so-called ‘third country recognition’. “I can envisage lines of 200-300 people waiting to have their liquids tested – it will be a disaster. What the European Commission expects to be of benefit to passengers, I think will be a disaster. It will be detrimental to the passenger experience,” added Rutten.

Schiphol’s frequent flyer customer loyalty scheme – Privium – has been in place since 2001. The key feature is fast, secure automated border passage, utilising iris recognition. The Privium programme currently has close to 50,000 members. It was taken to the next level in 2009, with the launch of the transatlantic ‘FLUX’ programme. Fast Low Risk Universal Crossing (FLUX) offers travellers between the US and the Netherlands the option of fast-track border crossing in the US for Dutch citizens and in the Netherlands for US citizens. Schiphol allows US travellers to use its Privium gates, while Privium members are entitled to use Global Entry programme border crossing facilities in the US. Rutten heralded the success of the FLUX programme and confirmed that Canada would be joining the alliance on 14 April as the next stage of the initiative through the Canpass Air programme which offers fast border passage at eight Canadian airports.

RECOGNISING VITAL ROLE OF AIRPORTS

Rutten stressed that capacity is a high priority in terms of both runways and terminal infrastructure. ACI EUROPE has long warned that Europe is facing an airport capacity crunch, with air traffic forecast to double by 2030. “This is an issue that requires a lot of investment,” said Rutten. “Fleet renewals by the airlines are bringing bigger aircraft, which means we are seeing capacity constraints without there being more flights – there are more passengers with the same amount of aircraft.” Indeed, Schiphol has found that the increasing number of larger aircraft it is receiving has meant having to remove some stands, effectively meaning it is losing capacity.

Ensuring competitiveness is another issue highlighted by Rutten, who emphasised the need for airports to develop their non-aeronautical revenue streams, which can help to fund the required investment in new infrastructure. “Every airport handling more than five million passengers per year must be regulated. Airports that play a vital role should have more leeway – there should be more support for small airports. The Observatory on Airport Capacity in the Single European Sky should be beneficial as a focal point for driving discussions. We, at ACI EUROPE, had pressed for such an Observatory,” he said.

The White Paper on the Future of Transport is currently under development and Rutten stated unequivocally that it should be recognised that airports are vital to regional, national and indeed the EU economy. “Airports play a vital role for local economies, which thrive when air services come in. The captains of industry would not be in Amsterdam without Schiphol being here. It should also be recognised that airports are businesses in their own right, with the responsibility to fund expansion. In the bureaucracy of Europe, many people think that airports still live on public money,” he contended.

Amsterdam Airport Schiphol plans to increase its airport charges by an average of 0.6% from 1 April 2011. In 2009, Schiphol actually lowered its charges, while in 2010 they remained unchanged. This incorporates a charge related to the investment in the new baggage system; for the first time, Schiphol is charging the costs of the partial completion of the system. As a means of optimising its capacity utilisation, Schiphol is also considering introducing an incentive programme designed to encourage airlines to use the airport during off-peak hours and also to add new destinations to their networks.

Schiphol’s forward-thinking approach to innovation and sustainability are strengthening its position as a key hub airport. Already crucial to both the regional and national economies, Schiphol is a gateway for international trade and an engine for economic activity, and innovative initiatives such as theGROUNDs appear set to ensure further sustainable growth.
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EC VICE PRESIDENT KALLAS AND EUROPE’S AIRPORTS DISCUSS 2010 AND THE FUTURE

As is customary, the European Commissioner for Transport attended the January meeting of ACI Europe’s Board. In the wake of a tumultuous 2010, the meeting was a welcome opportunity for Europe’s airports to discuss a range of issues and challenges with EC Vice President Siim Kallas.

REPORT BY ROSS FALCONER & ROBERT O’MEARA.

Ask anyone working in European aviation and they will all tell you that 2010 was the year of seeming endless bad surprises. Early hopes for green shoots turning into a strong traffic recovery vanished quickly, as the industry’s bottom line was pummelled by the volcanic ash crisis, the sovereign debt crisis, industrial action by airline and air traffic control staff, new security threats and last, but not least, the extreme weather conditions which affected transport links in a number of countries in December.

Ad Rutten, COO, Schiphol Group and ACI EUROPE President, reflected on these in his introductory remarks. Declan Collier, CEO, Dublin Airport Authority and First Vice President, ACI EUROPE, echoed Rutten’s remarks and addressed some of the future challenges affecting Europe’s airports in the context of increasing competition from the Middle East and Asia. He stressed the need for airports to develop additional capacity not just to remain competitive, but also to have the necessary operational flexibility to better overcome disruptions. Moreover, the ability to access finance and attract private investment will be crucial. The EU regulatory environment also needs to reduce pressures on operating costs, while providing new business opportunities through aviation liberalisation beyond Europe, he said.

TRANSPORT WHITE PAPER

The agenda included the forthcoming White Paper on the Future of Transport, which was still in development when the meeting occurred and as this magazine goes to print, and has yet to be adopted by the European Commission. Kallas explained that the Single European Sky programme is the key element of the White Paper in terms of aviation. The Board of ACI EUROPE asserted that airports have a vital role to play as
ground coordinators in the Single European Sky and, as such, need to be empowered to be in control of their infrastructure. Rutten said that, in addition to the SES, this is pertinent to airport slots and ground handling – both of which will be included in the Airport Package to be adopted by the European Commission this summer. Importantly, as was amply demonstrated by the recent severe weather conditions, airports must be empowered to set minimum service and quality requirements for ground handlers.

On the matter of winter operations and the European Commission’s criticism of airports’ handling of the extreme snow, the ACI EUROPE Board took the opportunity to challenge Vice President Kallas’ misperceptions about airports and emphasise the extensive planning airports undertake for weather disruptions.

The Board of ACI EUROPE stated that the extreme snowfall which affected parts of Ireland, the UK, France, Belgium and Germany was the worst in 40 years in some cases, disrupting not just air travel, but all modes of transport and many public utilities. The fact that it occurred at a peak period for holiday travel, with minimal spare airline capacity available, further compounded the impact on air passengers.

ACI EUROPE highlighted the fact that even at its worst moment, Europe’s airports were able to ensure that more than 85% of flights were unaffected during the severe weather. Furthermore, they ensured that passenger safety was uncompromised, with no accidents reported. The Board also clarified areas of responsibility, emphasising that incidents such as shortages of aircraft de-icing gel under the current European legislative framework, are mainly dependent on the actions of ground handlers and on the production and supply chain being guaranteed.

The Board also pointed to the collaborative nature of aviation and how no decision is taken in isolation. One example raised by Kallas was the provision of information to passengers. ACI EUROPE unequivocally insisted that this is primarily the responsibility of the airlines, and airports cannot automatically know whether flights are cancelled – they rely on the airline sharing that information as promptly as possible.

Kallas’ overall response was to state that he would refrain from legislative intervention, if the industry could deliver self-improvements.

**LIQUIDS, AEROSOLS & GELS**

On the subject of the 29 April deadline for the first phase removal of restrictions on liquids, aerosols and gels (LAGs), Kallas was adamant that this deadline would not be moved. The ACI EUROPE Board presented its concerns that the deadline is over-ambitious, and will result in lower security and a deterioration in the passenger experience, particularly at Europe’s hubs.

**ENVIRONMENT**

On the environment, Kallas conveyed his enthusiasm for Airport Carbon Accreditation, to which he has publicly stated his support a number of times, even participating in the certification ceremonies of several airports. The ACI EUROPE Board thanked him for this support. It also relayed the need for policy at European level to reconcile the growth of aviation with the EU’s own ambitious environmental agenda. Kallas expressed interest in meeting with ACI EUROPE and other industry stakeholders this autumn.

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**INTERNAL CHANGES AT THE EUROPEAN COMMISSION**

The European Commission’s Directorate for Mobility & Transport, DG MOVE has recently seen a few changes, which are very relevant for Europe’s airports, particularly in view of the work programme for the next year.

The European Commission’s Director for Air Transport for the past 6 years, Daniel Calleja Crespo stepped down from the role in mid-February and has moved to another part of the European Commission. The newly appointed Director of Air Transport is Matthew Baldwin, who brings extensive experience in trade regulation to the position. Mr Baldwin’s first public appearance was at the EU conference in Budapest in early March and he subsequently visited ACI EUROPE’s offices and was given a thorough briefing on the challenges facing Europe’s airports.

In other news, Ms Emmanuelle Maire has been appointed the new Head of Unit for Airports at DG MOVE. Ms Maire was recently invited to (and attended) the 69th meeting of the ACI EUROPE Policy Committee on 17 January, where she presented on the forthcoming Airport Package, due to be published by the European Commission in the coming months. The package covers a range of issues of relevance to European airports, including the revision of the EU Directive on Ground Handling and the revision of the EU regulation on Airport Slots, as well as other issues such as noise and airport capacity. Aside from cooperating on various ongoing consultations on all of these issues, ACI EUROPE is also currently in the process of arranging an ‘Airport Day’ for Ms Maire and her team, to give a more detailed view of all facets of airport operations.
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COMMUNIQUÉ AIRPORT BUSINESS: SPRING 2011 – P18

Siim Kallas, European Commission Vice-President responsible for Transport: “The construction of a true single sky has entered a crucial phase. We must put in place the concrete mechanisms that will allow the SES package to be implemented in time.”

The conference saw around 300 representatives of the EU institutions, Member States, air transport authorities and industry stakeholders discuss tangible measures to finalise implementation of the Single European Sky. By organising airspace and air navigation at a European rather than a local level, the SES initiative will increase the capacity of Europe’s skies, while also reducing aviation’s environmental impact. It is forecast that SES will result in annual savings of 500,000 tonnes of CO₂, 150,000 tonnes of fuel and €200 million in fuel burn and flight time.

The four sessions focused on the new regulatory framework, a ‘gate-to-gate’ perspective of the future air traffic management system, the contribution of functional airspace blocks (FABs) to implementation of the SES, and the SES as a pan-European objective.

In February, the Single Sky Committee approved the draft Implementing Rule on Network Management, in which EUROCONTROL was nominated to become Network Manager. EUROCONTROL is now consulting with Member States in advance of taking up the role as soon as possible. Addressing the conference, David McMillan, Director General, EUROCONTROL, said: “This is an important building block towards creating a Single European Sky. It’s a vital part of the move towards a more network approach to ATM – an approach that’s essential if we are to deliver the improvements in performance that are so clearly needed. It is also a further example of the strong relationship we at EUROCONTROL are building between ourselves and the European Union. This has been a key objective of mine ever since I became Director General.”

Matthias Ruete, Director General of Mobility and Transport (DG MOVE), European Commission, expanded on this, highlighting that there are a growing number of legal instruments which formalise EUROCONTROL-EU relations. “The Commission acknowledges that this patchwork of existing instruments could be consolidated under the same umbrella so that it better reflects the true level and intensity of our cooperation in the framework of the Single European Sky. But a framework that can, by the same token, also provide a longer perspective in EU-EUROCONTROL relations,” he said.

‘GATE-TO-GATE’ CONCEPT

Olivier Jankovec, Director General, ACI EUROPE, participated with a presentation on the ‘gate-to-gate’ perspective and airports. He stressed that air traffic is still forecast to nearly double by 2030; while airports are currently planning for a 40% capacity increase, with five new airports and 29 new or extended runways, 10% of demand will still not be accommodated. This, explained Jankovec, will mean unprecedented congestion levels, putting SES delivery at risk. Airport capacity is the key to the success of SES2, he said. There is a need for political visibility and commitment on the issue, and a total system approach from operational concept to policy concept.

Patrick Ky, Executive Director, SESAR Joint Undertaking, concurred with Jankovec that airport capacity must be aligned with ATM capacity. He explained that for SESAR the ‘gate-to-gate’ concept means the integration of the airport into the network, including all turnaround processes. In fact, over 30% of SESAR’s work is airport related. “The key action of the SES’s technical pillar is to study a broader approach to ‘gate-to-gate’, that will close the gap between arrivals and departures, which follows-on into the complete planning of a flight from departure, cruise, arrival and again to turnaround at the other end and finally post-flight analysis,” said Ky. “In terms of concrete proposals for 2011, SESAR will bring improvements to the airlines’ operational procedures for precision area navigation aiming at increasing capacity and lowering the environmental impact in complex terminal areas. Further, airports will begin to become better integrated into the network operations, and trials for the harmonisation of arrivals and departures operations will be completed this year.”

FUNCTIONAL AIRSPACE BLOCKS

The ‘Budapest Charter’ sets out the concrete and effective measures that can be taken by industry stakeholders to support implementation...
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As a leading infrastructure company in Turkey, we invest, operate and manage various assets including airports, ports, power generation and electricity distribution. Our investments are bound to expand from Turkey to Balkans, Middle East and the Caucasus. Our destination is to be an operating company across the region. We’re ready to take off!

A new hub is born

Be part of the flow of the region’s new center
of the SES. It is designed to complement the SES implementation roadmap and will be used to monitor its progress. It invites airports to promote SES implementation roadmap and will be used to optimise the use of available capacity from airport slot allocation to ground operations, provide information to the Network Manager, and contribute to strategic planning and coordination through the Observatory on Airport Capacity, play an active role in the deployment of new technologies and procedures relating to the SES, and to contribute to work related to the integration of the ATM component of the forthcoming Airport Package.

The Charter requires Member States to make stringent efforts to have the functional airspace blocks completed by 4 December 2012. The establishment of FABs is regarded as a fundamental means of enabling future optimisation of the pan-European ATM system and will see Member States collectively re-design and rationalise their airspace. This will contribute to the defragmentation of airspace and should allow important economies of scale. The FABs are a key element in the creation of the SES.

Pál Völner, Hungary’s Minister of State for Infrastructure of the Ministry of National Development, said: “European air traffic control is in need of a unified, technically synchronised and cheaper system. A decision on creating the Central European Airspace Block could come as early as April.” Once that decision is made, the agreement creating the Functional Airspace Block of Central Europe (FAB CE) will be signed by the seven partner states – Austria, Bosnia-Herzegovina, the Czech Republic, Croatia, Hungary, Slovakia and Slovenia.

Bogdan Donciu, Chairman of Romatsa, the Romanian air traffic services administration, provided a brief overview of the DANUBE FAB project, comprising the airspace of Romania and Bulgaria. He emphasised that safety will be improved through redesigning airspace and harmonising ATS procedures, while the technical systems of the two ANSPs will be harmonised and will be compliant with SES regulations in terms of technical performance and interoperability.

The need for a pan-European approach to the SES is clear and there was consensus at the conference of the benefits of this approach. One of the major challenges of the SES is reducing the complexity of the European ANS system. “The deployment of pan-European functions must be thought of in such a way that it contributes to the reduction of the complexity,” said Francis Schubert, Deputy CEO, Skyguide (Swiss air navigation services).

Jules Kneepkens, Rulemaking Director, EASA, added that “It has been recognised that the involvement of European countries not Members of the European Union should be pursued, so as to ensure a proper pan-European dimension in order to facilitate the improvement of civil aviation safety throughout Europe.”

**STEPS TOWARDS ACHIEVING SES**

Sím Kallas, European Commission Vice-President responsible for Transport, said: “The construction of a true single sky has entered a crucial phase. We must put in place the concrete mechanisms that will allow the SES package to be implemented in time. We must maintain the level of ambition that was set for us by the European institutions in establishing a long-term sustainable framework for air traffic management. This will not only give a boost to the industry; it will also make flights cheaper and reduce their impact on the environment. Our shared commitment to work quickly and constructively will determine the ultimate success of the Single European Sky.”

Three major steps towards achieving SES were announced at the conference. Firstly, a timely coordination took place between the European Commission and all partners involved in the provision of air navigation services to anticipate the impact of air traffic delays expected next summer. Short-term actions for the next six months were proposed to the conference, such as measures to enhance air traffic controllers’ mobility or to increase controlled airspace capacity. 2010 was not a good year for European Air Traffic Management. The headlines came from the volcanic ash crisis and the problems with snow – 175,000 cancellations, more than five times the figure for the previous year. EUROCOnTROL’s McMillan explained that there was also a major rise in delays – from an average of 1.6 minutes to 2.7 minutes. “Now because that’s spread across all flights, it doesn’t sound much, but it is. Delays of that size cost hundreds of millions of euro. It is clearly a problem that we need to tackle, urgently,” he said. “We’re now looking ahead to the busy summer season of 2011. As is the case every year, we’ve done a lot of planning and identified problems and bottlenecks. I’m afraid to say it doesn’t look good. We’re forecasting an average delay this year of 1.8 minutes.”

The issue will be on the agenda of the Transport Council of Ministers in both March and June, for relevant follow-up actions.

Secondly, the EU and EUROCONTROL announced their intention to explore a possible high-level cooperation agreement, consolidating the reform process of EUROCONTROL as well as the essential support provided by EUROCONTROL to the implementation of SES, notably in its role as performance review body and network manager.

Thirdly, the EU and the US signed an important Memorandum of Cooperation in the field of civil aviation research and development, as well as a first annex covering cooperative activities and interoperability aspects in the framework of their respective air traffic modernisation programmes: SESAR and NextGen.

The conference concluded that enhanced cooperation between air traffic management stakeholders and extension of the SES to non-EU states can be expected to generate significant benefits.

It was also agreed that the ‘gate-to-gate’ approach – the incorporation of all phases of flights, from airport to airport, in a global approach to air traffic management – will bring major added value to SES, as will the centralisation of operational functions managed at European level and the deployment of new technologies.

In his closing address, Völner indicated that he would present the conference findings at the 31 March meeting of the Transport, Telecommunications, and Energy Council. He urged the following Polish Presidency of the EU to continue to support implementation of the Single European Sky programme.
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The existing ban on the carriage of liquids, aerosols and gels (LAGs) was introduced in August 2006, following the dramatic discovery in the UK of a terrorist plot involving liquids explosives to be used on transatlantic flights. In a matter of weeks, variations of the ban had spread across the primary aviation markets of the world. Since then, this single issue has undoubtedly redefined the perception of air travel, as airports and passengers alike seek to minimise the waiting time involved in passing through security. However, as the risk of liquid explosives is still considered an ongoing threat, further progress can only come from technology and better sharing of intelligence.

Under the current LAGs security rules, travellers arriving in the EU from a non-EU country airport and transferring to another flight are not allowed to carry LAGs exceeding 100ml on board their next flight, unless arriving from an approved airport with so-called ‘third country recognition’ (namely Croatia, Singapore, Malaysia, Canada and the USA). These LAGs, including duty free/travel value purchases sealed in STEBs, are confiscated.

Following pressure from the European Parliament to the European Commission to remove the restrictions on the carriage of liquids, aerosols and gels, in November 2009, the EC Vice President for Transport at that time, Antonio Tajani announced that the restrictions would be removed in a two phase process, due to begin the following year. However, the agreement behind that initial timeline encountered some delays at EU level. Nevertheless, on 29 April 2010, the European Commission – at that time under the newly appointed EC Vice President for Transport Siim Kallas – confirmed that the plan would go ahead with legislation detailing the new timeline: Under Phase 1 of the agreement, from 29 April 2011 any traveller arriving in the EU carrying duty free LAGs sealed inside a STEB (Security Tamper Evident Bags) that meets ICAO specifications, and with a receipt that shows it was purchased within the last 36 hours, can freely transfer within any airport in the EU. Under Phase 2, all LAGs restrictions for all passengers will be lifted at EU airports on 29 April 2013.

However, looking more closely at the operational impact of Phase 1, it will not be purely limited to transfer passengers. Passengers arriving in Europe with LAGs purchased at non-European airports will be able to carry their LAGs when re-entering a European airport within 36 hours and fly again to any destination, on condition that the STEB has not been opened.

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Kromek’s technology is vital to a wide range of market sectors, pioneering digital colour imaging for X-rays and advanced 3D imaging for the security, industrial inspection, defence and medical markets. Most recently, Kromek has developed in particular at larger hubs, with knock-on effects on the entire network, as a result of missed connections and delayed flights.

Throughout the process, ACI EUROPE has worked tirelessly to point out the operational concerns for the viability of Phase 1, stating its opposition clearly to the various EU institutions at different times. In July last year, ACI EUROPE reiterated its objections in a letter to Vice President Kallas and at the beginning of this year – after the results of laboratory testing of LAGs screening technology under the auspices of the European Civil Aviation Conference (ECAC) had been announced – airport CEOs also raised the issue with him, when he attended the January meeting of the Board of ACI EUROPE.

Several EU Member States have also approached the European Commission with their concerns. France has been particularly clear on this, formally notifying the European Commission that it will keep the existing restrictions in place, while others are apparently considering implementing national more stringent measures, such as raising the percentage of items to be screened. In spite of these objections, Vice President Kallas has clearly stated that he does not intend to postpone the implementation of Phase 1 on 29 April 2011.

Reaction from the European Parliament has been mixed. Despite support for ACI EUROPE’s position within Parliament, Brian Simpson, MEP and Chair of the Transport & Tourism Committee, came out against a postponement of the deadline, after a meeting with Vice President Kallas.

The US Transportation Security Administration is currently reviewing internally its own policy concerning the restrictions on LAGs, and is expected to report its views to the European Commission very shortly. The cooperation of the US will have a major bearing on the viability of the plan, and so the TSA’s views will be very important. At time of press, the US decision was still unknown.

At present, it appears that the intended benefit to passengers will not materialise as the operational limitations of the existing LAGs screening technology, coupled with passenger flow challenges and a non-uniform system between EU Member States, will ultimately see security lines become slower and longer. Even the most advanced technology available still requires that LAGs have to be taken out of STEBs and accompanying presentation boxes/containers and screened separately from other belongings. And bottles might still be opened. The impact of passengers seeing their duty free alcohol or perfume purchases fully opened, is one that could result in some very irate scenes at airport security points.

Amongst industry stakeholders, airports are not alone in having concerns about the viability of Phase 1 and its potential impact on operations. Hub carriers Air France and British Airways are said to be deeply concerned about the possibility of security delay having a ripple effect on the punctuality of departing flights. ERA, the association of European Regional Airlines has also issued several statements, clearly calling into question the operational viability of Phase 1.

However, with little time remaining and all alternative avenues now apparently closed, it looks like Phase 1 will be launched on 29 April 2011. Make no mistake, the implementation of Phase 1 is without question the most urgent and daunting task facing security teams across the EU’s airport network, especially at major hubs.

**KROMEK READY FOR 29 APRIL**

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ENSURING ECONOMIC VITALITY AS INDUSTRY RETURNS TO GROWTH

THE THIRD ANNUAL ACI AIRPORT ECONOMICS & FINANCE CONFERENCE WAS HELD IN LONDON ON 1-2 MARCH. THE EVENT, JOINTLY ORGANISED BY ACI EUROPE AND ACI WORLD, WAS PARTICULARLY TIMELY AS INDICATORS POINT TO A HEALTHIER GLOBAL ECONOMIC ENVIRONMENT AND A RETURN TO AIR TRAFFIC GROWTH, WHILE SIGNIFICANT CHALLENGES REMAIN. ROSS FALCONER REPORTS.

The conference provided a platform for a broad range of industry stakeholders to discuss the key issues affecting the long-term financial performance of airports. It attracted attendees from all sectors of the industry, including airport CEOs, CFOs, investors, regulators and academics.

Figures for 2010 show a +6% rise in passenger traffic worldwide, with an increase in both domestic and international markets. Angela Gittens, Director General, ACI WORLD, explained, however, that North America traffic growth is down by -7% compared with 2007. “We have winners and losers within the mature markets and not all destinations in emerging markets share the strongest rates of growth, but the global averages are robust and the mood is positive,” she said.

2009 was, as Olivier Jankovec, Director General, ACI EUROPE, put it an “annus horribilis”, in which 100 million passengers were lost and both aeronautical and non-aeronautical revenues declined. It was a year punctuated by increasing capital costs, deterioration in financial performance and increasing airline pressure in terms of charges. 2010 saw a return to growth in Europe, with a +4.2% increase in passengers and a +18.7% increase in freight. However, that growth was tempered by external shocks such as the volcanic ash crisis, industrial action and extreme weather.

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Looking ahead, Jankovec explained that ACI EUROPE has identified four key challenges: Capacity, Environment, Connectivity and Security. In terms of capacity, air traffic will double by 2030. “There will be a 40% capacity increase, but 10% of demand will not be accommodated,” he said.

On the environment, regulators and industry are taking action. Aviation will be part of the EU Emissions Trading Scheme from 2012 and industry commitment is evident through ACI EUROPE’s Airport Carbon Accreditation, in which 43 airports in 18 countries are already participating, with a current CO₂ reduction of 619,881 tonnes. But Jankovec stressed that “we need clear direction at EU level on environmental objectives”.

The scale of the security challenge is starkly highlighted by the fact that security now accounts for 29% of airport operating costs; that figure was only 5-8% pre-9/11. “Security is an everyday headache operationally and financially. Airports will have to deploy new technology, which will be costly. The airport of the future will have seamless, integrated processes,” said Jankovec.

FUTURE GROWTH

A high-level panel addressed the “State of the Industry”, with participation from Michael McGhee, Partner, Global Infrastructure Partners (GIP); Colin Matthews, CEO, BAA; Arturo Recio, Managing Director, Global Head of Infrastructure, HSBC; and Tim Coombs, Managing Director, Aviation Economics. Coombs said that the outlook for 2011 versus 2010 is favourable, with growth...
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on average of 8.5% in the first three months of 2011. He added that there are potential further increases in aviation taxes and fuel surcharges on the horizon.

Providing a UK perspective, McGhee expects traffic recovery for the next year or two, but is more pessimistic after that. “Growth in the UK faces a few challenges. Growth will be slower than historically due to the need to pay government and private debt,” he contended.

Emerging markets lead the way in terms of future growth, according to Recio, who offered the view that there will be an increasing trend towards private sector investment in airports. “After one of the most challenging times in aviation history, the outlook now appears brighter,” he said.

The conference covered myriad subjects, including Regulatory Affairs, Airport Ownership, Airport Revenue Growth and Airport Performance. Iain Osborne, Group Director, Regulatory Policy, CAA UK, stressed the need for all players on the airport campus to work together well, stating that “effective relationships are key to delivery service quality”. “Pricing transparency is an issue for both airlines and airports individually, but the relationship between the two is important,” he said.

The Copenhagen Airports story is particularly interesting. The strategy at CPH is to facilitate choice for passengers and create infrastructure dedicated to both low-cost and full-service carriers. Jeff Salter, Director of Sales Excellence & Public Accounts at Copenhagen Airports and Chair of the ACI EUROPE Economics Committee, explained that there is a dual airport strategy, with the low-cost pier CPH Go opening in October 2010 with a lower airport charge, operating side-by-side with the full-service product. He offered three key points: “Passengers are the source of all revenue – an airport’s interests are aligned with the passengers’ interests. Customer knowledge and insight is a prerequisite for developing an airport in a customer-focused way. The passenger perspective is a natural and integrated part of regulatory affairs.”

**RESPONDING TO CHANGE**

A key theme of the conference was that change is a constant in the aviation industry, and there was a consensus that adaptation, innovation and preparedness for change are essential. Ray Gray, CFO, Dublin Airport Authority, delivered an insightful perspective on the financial implications of abrupt change. He identified three stages of managing change – Positioning, Responding and Repositioning. Positioning takes place pre-event and involves such issues as liquidity and funding, capex timing and risk diversification; Responding means taking evasive action and factors such as reassessing capex plans, reducing costs and revenue protection and recovery; Repositioning involves step-changing the business – facility transformation, quality of the retail offering, focus on the passenger experience and efficiency in operations and costs are all important. Dublin Airport Authority implemented a cost reduction programme in 2009, during which it negotiated in partnership with unions and staff. Results include a 20% reduction in legacy staff through voluntary severance and contracts not being renewed, as well as substantial pay adjustments, with pay cuts of up to 12% – the average being 5.5% – and a further 18-month pay freeze.

Dr Waled Youssef, Chief Strategy Officer, TAV Airports Holding and Chair, ACI Economics Committee, provided an overview of TAV Airports’ dynamic growth. It currently operates 10 airports, which handled a total of 47.6 million passengers in 2010 – an increase of +13% year-on-year.

**MATURE MARKET GROWTH**

GDP growth in the major aviation markets bodes well for the global economy and air transport demand. China and Brazil remain the fastest growing economies, while growth in the major mature markets of Germany, the UK, Spain and Japan has further accelerated. The consensus following the two-day event was that, while the worst of the economic crisis appears to be over, challenges remain, not least continuing tight financial markets, sovereign debt crises and rising oil prices. It was widely agreed that airports must build on the renewed confidence that is reflected in the return to traffic growth and strive to strengthen their economic vitality.
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EUROCONTROL RELEASES NEW LONG-TERM FORECAST

THE YEAR HAS STARTED WITH OPTIMISM RETURNING TO TRAFFIC FIGURES. HOWEVER, WITH AVIATION STILL EXPOSED TO ‘CONSTANT SHOCK SYNDROME’, ALL EYES ARE LOOKING FOR THE LATEST DATA ON LONG-TERM AIR TRAFFIC GROWTH WHICH TAKE INTO ACCOUNT EXTERNAL DISRUPTIONS. EUROCONTROL HAS RELEASED A REVISED LONG-TERM FORECAST OF FLIGHTS IN EUROPE. PAUL WILSON, HEAD OF AIRPORT OPERATIONS, EUROCONTROL, OUTLINED ITS REVISED ESTIMATES TO ROSS FALCONER.

EUROCONTROL’s new Long-Term Forecast (LTF) of flight movements in Europe to 2030 indicates that, under the most likely scenario, there will be 16.9 million IFR (Instrument Flight Rules) movements in 2030 – 1.8 times more than in 2009. “The findings from the 2008 Challenges of Growth study remain generally correct. It is a fact that traffic growth was lower than expected, so around 16.9 million IFR flights are now expected to take place in 2030 as opposed to the 17.5 million predicted in the Challenges of Growth study. This lower growth will obviously put back some of the dates mentioned in the report,” explained Wilson.

The new LTF reuses the LTF08 airport capacity data, extended and refreshed for major recent developments and changes in the plans over the last two years – for example, dropped plans for a third runway at London Heathrow and updated capacity for Berlin-Brandenburg. “In total, the capacity of the system is expected to increase by around 40% between now and 2030, not evenly distributed across the 155 airports covered,” said Wilson.

According to EUROCONTROL forecasts, growth will be faster in the early years and stronger in Eastern Europe, with Turkey being the largest generator of extra flights in Europe and Germany seeing the greatest number of additional flights in its airspace.

The 2008 Challenges of Growth study highlighted airport capacity challenges and the need for new infrastructure. It forecast that the number of unaccommodated flights would grow rapidly from 0.9 million in 2025 to 2.3 million flights by 2030, meaning that 11% of flights would not be accommodated. The 2010 Long-Term Forecast indicates that around two million flights will be unaccommodated – around 10% of demand. “This is less than in LTF08 mainly because of overall lower forecast levels for 2030 compared to two years ago. The recent drop in traffic has given the system some extra years to react. However, as in the previous forecast, once the limits are reached the congestion spreads and the number of unaccommodated flights grows quickly. With demand growing at similar rates also after 2030, it can be expected that the levels of congestion reported in LTF08 will be reached before 2035,” Wilson commented.

OPTIMISING AIRPORT OPERATIONS

Under the Network Manager function, EUROCONTROL works with airport stakeholders to optimise airport operations. Wilson explained that they must be integrated into the network which allows optimum use to be made of existing capacity and delivers the flexibility that airport operations require.

He said: “Airports generally grow their capacity in line with firm traffic forecasts. Those airports that are nearing capacity do a great job in capacity enhancement and

EUROCONTROL's new Long-Term Forecast (LTF) of flight movements in Europe to 2030 indicates that, under the most likely scenario, there will be 16.9 million movements in 2030 – 1.8 times more than in 2009.
Zigmuntas Versekas, 39 years work experience
Airfield worker at Vilnius International Airport

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in ensuring they make absolute best use of their runways and other infrastructure. Once an airport is full, then one option is to use secondary airports. The only other option is to build new runways and we know this can be a very lengthy task in getting the permission to start building.”

In October 2008, ACI EUROPE and EUROCONTROL launched a partnership revolving around the implementation of Airport Collaborative Decision Making (A-CDM); CANSO joined the partnership in October 2010. A-CDM can ensure best use is made of capacity at airport level, and it also allows optimum use to be made of en-route capacity, due the exchange of highly accurate data and the increased predictability this brings. Implementation is underway at around 30 airports, with the target being for 10 European airports to have fully implemented A-CDM by the end of 2011. “A-CDM is at the very core of the airport operation envisaged in the SESAR concept of operations. In fact A-CDM will evolve into SWIM – System Wide Information Sharing,” explained Wilson.

While the decline in traffic in 2008 and 2009 has eased the pressure on airport capacity to a certain extent, in the longer term, demand will grow, resulting in two million flights, or 10% of demand, being unaccommodated in 2030, according to EUROCONTROL forecasts. In addition to unaccommodated demand, airport capacity constraints also affect the flow of operations in the network, which Wilson concluded will make the network more vulnerable to delays.

*Wilson: “The findings from the 2008 Challenges of Growth study remain generally correct. It is a fact that traffic growth was lower than expected, so around 16.9 million IFR flights are now expected to take place in 2030 as opposed to the 17.5 million predicted in the Challenges of Growth study.”*
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SAVE TO DEVELOP LOW-COST NETWORK AT CHARLEROI


BSCA celebrates its 20th anniversary this year. The airport has made much progress in those two decades, registering throughput of 5.2 million passengers in 2010 – a notable increase of +32% on the previous year. That success has continued into 2011, with the latest figures for February showing that BSCA handled 372,871 passengers – up an impressive +22% year-on-year. Already 11 new destinations have been announced for the summer season, including a Jetairfly service to Athens and a Wizz Air service to Belgrade. Ryanair accounts for the remaining nine new routes – to Volos, Thessaloniki, Rhodes, Perugia, Pescara, Lamezia, Kos, Almeria and Biarritz.

Gering explained that “due to the current limited capacity of the airport, we intend to achieve controlled growth of 12-15% in 2011”.

The airport is currently building four additional gates, which will be operational in summer 2011 and will allow it to handle more aircraft simultaneously. “The accessibility of the airport, one of our key selling points, has also just been increased by an important upgrade of the two direct access roads,” said Gering. “By June, the brand new dynamic signalisation system is planned to be operational, and the former economy parking is currently being upgraded and modernised in order to cater for 2,500 additional parking spaces over the summer season.”

**SUSTAINABLE GROWTH**

The SAVE consortium has the right to acquire a further 20.68% of BSCA’s share capital, and Marchi confirmed that it is interested in doing so. He explained that SAVE chose to acquire a shareholding in BSCA due to its dynamism as a regional airport and its potential for strong growth in the medium to long-term. “Our intention from the start has been to consolidate the position of the airport as a strategic gateway to a wide area that includes, in addition to the Walloon region, Belgium, Luxembourg, northern France, western and central Germany, and the Netherlands, and to use our experience to develop that potential,” said Marchi. “Our presence at BSCA allows us to express and develop our experience of managing a network that includes low-cost, charter and cargo flights, and short, medium and long-haul traffic.”

The main objective is to achieve sustainable growth through the development of point-to-point services throughout Europe, primarily by strengthening the Ryanair base and gradually increasing the number of low-cost carriers serving the airport. A second target in the medium-term is to further develop charter services from the airport. “These objectives must necessarily be supported by a flexible and efficient management. The region will derive significant benefits in terms of wealth and job creation,” said Marchi.

SAVE will also utilise its airport master planning experience to ensure the progressive development of infrastructure at BSCA. Any developments will be undertaken with ongoing dialogue with the local community to ensure that the region’s mobility requirements correspond with environmental sustainability objectives. “In the medium to long-term, BSCA will undoubtedly become a leading low-cost destination in Europe. Passenger numbers will grow in parallel with enlargement of the network of services,” explained Marchi.

SAVE’s long-term strategy also includes the introduction of long-haul services, particularly to Asia and North America. “This is an achievable goal, which needs to be supported by market analysis and a visionary management strategy,” concluded Marchi.
AIRPORTS HARD AT WORK ON REDUCING THEIR CO₂ EMISSIONS

AIRPORT CARBON ACCREDITATION – THE CARBON MANAGEMENT STANDARD FOR AIRPORTS – GOES FROM STRENGTH TO STRENGTH, WITH A NUMBER OF SIGNIFICANT ACCREDITATIONS SINCE THE START OF THE YEAR. A DIVERSE RANGE OF AIRPORTS EITHER SUCCEEDED IN BECOMING PART OF THE AIRPORT CARBON ACCREDITATION FAMILY, OR UPGRADING THEIR ACCREDITATION LEVEL. ROBERT O’MEARA REPORTS.

The latest update on Airport Carbon Accreditation benefits from a very promising start to the year, as airports who submitted applications in the final months of last year received confirmation of their accreditation from the independent programme administrator, WSP Energy & Environment. The year began with the certification of a first complete airports group – Portuguese airports operator ANA – they achieved the accreditation of all 7 of their airports at the ‘Mapping’ level. Meanwhile, on the other side of Europe, Moldova’s Chisinau International Airport also entered the programme at the ‘Mapping’ level, as did Budapest Airport, where EC Vice-President in charge of Transport Siim Kallas presented them with their certificate, during the recent air traffic movements conference which took place in Budapest as part of the Hungarian Presidency of the EU.

Moving up a level to ‘Reduction’, Athens International Airport achieved this level of accreditation, progressing from its original ‘Mapping’ status. Germany’s Hamburg Airport succeeded in entering the programme at the ‘Reduction’ level as well, while London-Gatwick – the busiest single runway airport in the world – also made the grade. Last year, Gatwick launched its ‘Decade of Change’ sustainability strategy for developing the airport in a sustainable way over the next 10 years. Stewart Wingate, CEO of Gatwick commented “Our target is to reduce our carbon emissions by 50% over the next 10 years. Achieving the ‘Reduction’ level of Airport Carbon Accreditation signals an important milestone for us. We are already well on our way to achieving the next level of accreditation as we look to reduce our carbon emissions year-on-year.”

Both Frankfurt Airport and Manchester Airport – two of the earliest airports to originally become Airport Carbon Accredited when the programme launched in 2009, moved up from ‘Reduction’ to reach the ‘Optimisation’ level. Just as we were sending this issue of Airport Business to print, Amsterdam-Schiphol had just received news of its accreditation at the ‘Optimisation’ level. And finally, following hot on the heels of its Dutch neighbour, another one of Europe’s top 10 busiest airports, Munich Airport also became Airport Carbon Accredited for the first time, achieving ‘Optimisation’ from the get go. Michael Wühle, Vice President Environmental Protection, Munich Airport, described the accreditation as very important for the airport. “Currently the priority is climate change and our CO₂ reduction measures. We believe that we can reach the ‘licence to grow’ from the public and the region if we can show that Munich Airport does a lot in terms of decreasing CO₂ emissions. In 2009, Munich Airport set a strategic goal of achieving carbon neutrality in its future growth by 2020 for measures and activities within its direct sphere of influence,” he said.

With these developments, Airport Carbon Accreditation now covers 43 airports in 18 European countries. This accounts for over 43% of European passenger traffic, which are collectively responsible for the reduction of over 749,000 tonnes of CO₂. In less than two years, the programme has achieved a reduction equivalent to taking 200,000 cars off the roads!

As part of ACI EUROPE’s efforts to help accredited airports, the association hosted a special Airport Carbon Accreditation Communications Workshop on 17 March; over 20 participants attended, from airports all over Europe.
The airport has capacity to accommodate 4-5 million passengers per year and therefore has sufficient scope to increase its business. Mareddu explained that the next important expansion plan will be completed within the next two months, delivering a brand new terminal dedicated to General Aviation, as well as a new aircraft parking area for private jets. The airport’s runway was refurbished less than two years ago.

“Cagliari Airport has a very important role in the social and economic growth of Sardinia and not just because we are one of the largest companies in the Sardinian region, but because we are conscious that our actions and our strategy have a direct and substantial impact on the regional economy,” said Vincenzo Mareddu, Chairman, Cagliari Airport. He spoke to Ross Falconer.

Mareddu: “We work very closely with the airlines, as well as with our regional tourism board on the promotion and marketing of routes. We carry out all sorts of marketing and promotional activities, such as the organisation of press trips, educational trips and press conferences.”


CAGLIARI AIRPORT GROWTH BOOSTS REGIONAL ECONOMY

ROUTE DEVELOPMENT STRATEGY

Cagliari Airport’s route development strategy is based on five core principles:

- To consolidate its existing business with its existing airlines;
- To distribute traffic flows during the entire year in order to achieve de-seasonalisation objectives;
- To maintain and diversify the portfolio of airlines operating at the airport in order to avoid any type of monopolistic pressure;
- To open new point-to-point routes which can develop primarily inbound traffic flows; and
- Try to avoid the building of aggressive competition among carriers operating at the airport, although ensuring a healthy and balanced competitive environment by guiding them into markets that do not excessively overlap other existing services.

“We work very closely with the airlines, as well as with our regional tourism board on the promotion and marketing of routes. We carry out all sorts of marketing and promotional activities, such as the organisation of press trips, educational tours and press conferences. Apart from investments in traditional advertising solutions – newspapers, magazines, billboards, etc – we also invest highly in web marketing activities,” explained Mareddu.

The airport’s ambitions include a general traffic increase of 4.5% per year for the next 5 to 10 years, an increase especially in the low-cost traffic and general aviation industry and Mareddu has also identified an increased need to diversify and boost non-aeronautical revenues. If all that wasn’t enough, Cagliari Airport will also host two big events in May – the Routes Europe conference (8 to 10 May) and ACI EUROPE’s 4th Annual Regional Airports conference and exhibition (9 to 11 May).
The Regulation was introduced in July 2008 with the purpose of improving accessibility to air travel for disabled persons and PRMs, ranging from the stage of booking through to arrival at the final destination.

“There have been improvements in most places – at most airports and at most airlines,” said Maria Nyman, policy officer, European Disability Forum. “Passengers are more aware of their rights and because of this they are more likely to see where there are gaps in the service they receive. It’s very positive that passengers with reduced mobility know they have these rights.

“The number of passengers with reduced mobility who travel by air has increased, but it’s important for us to ask how the service can be proactively improved. There are some gaps that need to be addressed in the Regulation itself, but we recognise that the implementation of a new Regulation is always a process and it’s bound to take time to get it right.”

One area of contention, she explained, is the fact that when mobility equipment is damaged in transit, the passenger is not necessarily entitled to compensation, while passengers with respiratory equipment are also not protected by the regulation.

“Also, the national enforcement bodies in governments often lack resources, such as office personnel, to deal with these specific issues and that’s a problem at the national level,” Nyman added.

**PROVIDING ASSISTANCE**

In line with the Regulation, in Europe, services for the assistance of PRMs are contracted to the airport operator, where as outside of the EU, services are contracted directly with airlines.

In the UK and Ireland, OCS currently works as a contractor providing mobility assistance to passengers with reduced mobility at 10 airports, including Gatwick, Manchester, Birmingham and Dublin.

These services include meeting and assisting PRMs upon arrival at the airport, agreeing their needs and providing the necessary assistance, ranging from wheelchair or buggy assistance, to personal assistance for hearing or visually impaired passengers.

Steven Wheeler, OCS aviation director, explained: “There is no question that the introduction of EU Regulation 1107/2006 has resulted in a general improvement in service for PRMs. From a contractor perspective it has improved coherence in providing services and facilities at the airport, with opportunities to improve the passenger experience that were not previously available under airline contracts. It
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has enabled us to provide host desks, while staff planning is more efficient and responsive.

“The minimum quality of service is laid down by EU legislation and the clear requirements – in terms of responsiveness and wait times – means that the service can be easily understood and catered for.”

One of the ways in which OCS has improved responsiveness to PRM requests is through the Resource Allocation System. Based on INFORM, it is a real-time tool which reads passenger booking information from SITA, automatically updating with any changes, and matches passenger requirements against staff resources to ensure that customer needs are met.

**STAFF TRAINING**

Nyman also highlighted staff training as a vital component of providing a seamless air travel experience for PRMs. OCS, for instance, offers NVQ (National Vocational Qualification) training to staff in areas such as customer service and disability awareness, and according to Nyman, such training is “essential” to ensure that the Regulation has the desired impact.

“The training is not only essential but it’s also the most cost-effective means of ensuring the non-discrimination of passengers with reduced mobility,” she said. “This training must also involve the disability organisations to ensure that it’s reflective of the needs of the passengers.”

While there is little doubt that the introduction of the EU legislation has positively impacted on the air travel experience for passengers with reduced mobility, both Nyman and Wheeler noted that there is scope for further improvement.

Nyman said: “From the airline perspective, the information must be better. Today, there’s a lack of accessible information and the booking system is complicated because you have to book assistance at a separate stage to booking your tickets.” Furthermore, ensuring that PRMs have the opportunity to make use of all airport facilities is also important to ensuring non-discrimination.

Wheeler added: “We can certainly be satisfied as an industry with the strides we have taken over a relatively short time in the provision of service to PRMs. There is, of course, still room for improvement, in communications, notification and understanding the needs of PRMs. However, considering that airports had limited knowledge of PRM operations prior to 2008 and no-one had faced the unique challenge of running such an operation across a whole airport, the development to-date has been exceptional.”

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**SIDECAT HIGHLIFTER FOR AIRCRAFT**

CATCON technologies’ philosophy is to find compellingly simple and cost-effective technical solutions. The Austrian company develops, manufactures and services special vehicles for aircraft ground handling and related areas, focusing in particular on the award-winning SideCat.

The unique aspect of the SideCat highlifter for aircraft is its ability to lift from zero to over 8m without pause, time-consuming stabilising measures or changing driver position. The simple but revolutionary idea behind the SideCat is particularly effective for the Airbus A380. Being side-mounted, the SideCat easily reaches the necessary height of over 8m and can access the upper deck door, which is positioned unfavourably over the wings, without auxiliary aids.

“At this point in time, we are the only provider who can overcome this challenge without auxiliary constructions,” explains CATCON managing director Dieter Wertheim.

This all-rounder offers versatility too: it can be used for catering purposes or for transporting passengers in wheelchairs and VIPs who require separate access to the aircraft. The SideCat can be used as a work platform: with its waste compactor it becomes a waste disposal vehicle and with its stair extension it can deliver passengers to the A380 upper deck.

When the A380 paid its first visit to an international passenger airport in Frankfurt, the SideCat highlifter was employed, having been subject to extensive testing from the Airbus team. The SideCat proved its worth, and showed that it is perfectly suited to handling the A380. The vehicle’s flexibility has not only attracted the attention of airports, handling agents, catering companies and maintenance service providers, but also that of the German Innovation Award jury, who awarded the prize to CATCON. Airbus and Frankfurt airport (Fraport) are among its launch customers.
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The true cost of mishandled baggage is best highlighted by the conclusion of the SITA Baggage Report 2010. While figures for 2009 showed that the mishandled bag rate had dropped by 24% year-on-year, 25 million bags were still mishandled globally, resulting in a cost of $2.5 billion ($1.8 billion) to the industry.

As airlines and airports alike have explored how to overcome this issue, the reliability of bar coded bag tags, which offer an average read-rate of approximately 80%, has been highlighted and new technology, namely Radio Frequency Identification (RFID), has been identified as a more dependable alternative. Ranging from Las Vegas McCarran to Aalborg, RFID has been adopted by a handful of airports and while this has required the upgrade of the necessary infrastructure, the result has been a read-rate in excess of 99%.

Aalborg Airport last year adopted Lyngsoe Systems’ RFID on Baggage solution, following in the footsteps of Lisbon, Milan Malpensa and Hong Kong International airports. “We needed a new solution that could help us handle an extensive increase in the volume of baggage,” said Søren Svendsen, CEO, Aalborg Airport. “RFID is the future for baggage handling and will be able to provide us with new possibilities for accurate baggage handling and passenger services that we could not provide without it. Therefore, Lyngsoe’s RFID solution will be the platform for a completely new way of providing passenger services, RFID technology is supported by IATA (International Air Transport Association), which is very important for us and the industry.”

The upgrade required the installation of new RFID readers, while the facilities had to be in place for the printing of the new tags. As the

**THE IMPACT OF THE NEXT-GENERATION BAG TAG**

NEXT-GENERATION BAG TAGS ARE WIDELY REGARDED AS HOLDING THE SOLUTION TO ONE OF THE AVIATION INDUSTRY’S LARGEST SOURCES OF PREVENTABLE REVENUE LOSS: THE LOST BAG. **RYAN GHEE** EXPLORES THE BENEFITS OF REPLACING THE TRADITIONAL BAR CODED BAG TAGS AND THE IMPACT ON EXISTING BAGGAGE HANDLING INFRASTRUCTURE.

Since December 2008, Lisbon Airport has been sorting transfer baggage solely by RFID.

Excess opened its first ‘pop-up’ Baggage Centre at Gatwick’s South Terminal in February. The concept allows speedy installation or, if necessary, quick relocation of an outlet, and also has the advantage of significantly reducing development costs. The outlet, which is positioned adjacent to busy check-in areas, catering for Virgin and easyJet passengers, provides Luggage Shipping, Bag Wrap, and Travel Goods Retail, and complements the company’s three other outlets in the terminal. David Elliott, Excess Baggage Company’s CEO, commented: “This outlet has generated a significant amount of interest from airport operators both in the UK, and further afield in Europe and Asia. Putting a Baggage Shipping service in front of passengers as they check-in has significantly increased our visibility, and usage, and the unit is exceeding all expectations in terms of turnover. We are doing record volumes of Bag Wrapping, and Travel Goods are simply flying out of the door.” He continued: “We hope that this unit’s success will convince other airport terminal operators of the validity and viability of this offer. Of course, we do encourage airports to cherry pick the services that they want to have in a particular location, and we have limited this outlet to three services only, as we have further units in the vicinity, providing Over-the-Counter Left Luggage, Duty Free Shop & Collect, and Online Lost Property. We are currently in discussions with a number of airports and we are keen to roll out the concept as widely as possible.”

Elliott also noted: “Our online Travel Goods website, www.LuggageExpress.co.uk, is also attracting wide interest. This site allows terminal operators, airlines, and travel vendors to generate an extra revenue stream from passengers pre-travel.”

Since December 2008, Lisbon Airport has been sorting transfer baggage solely by RFID.

Excess opened its first ‘pop-up’ Baggage Centre at Gatwick’s South Terminal in February.
LIMAK YATIRIM PLANS PORTFOLIO EXPANSION

LIMAK YATIRIM operates and invests in a diverse portfolio of infrastructure projects in the areas of energy & utilities, and transportation & logistics. The current operations of LIMAK YATIRIM are located in Turkey, Kosovo and Georgia.

AIRPORT OPERATIONS OF LIMAK YATIRIM

Limak Yatırım plans to further expand the portfolio of projects and assets under its management by continuing to invest in selected markets in the Balkans, the Middle East, South Asia and other surrounding regions experiencing strong economic growth.

Currently, Limak Yatırım has two airports in the portfolio; Istanbul Sabiha Gökçen Airport and Pristina International Airport (PIA Airport) where the handover of PIA Airport is expected to take place in April and Limak Yatırım expects to own a 49% stake in the company, Limak Kosovo International Airport JSC (“LKIA”).

ISTANBUL SABIHA GÖKÇEN INTERNATIONAL AIRPORT (ISG AIRPORT)

ISG Airport, Turkey’s third-largest airport and one of the fastest growing airports in Europe in terms of passenger traffic in 2010, is located approximately 35km southeast of central Istanbul, on the Asian side of the city. ISG Airport serves a catchment area with a population of approximately 20 million people. Airlines operating at the airport reach over 20 domestic and over 60 international destinations.

ISG Airport handled approximately 11.6 million passengers in 2010, which represents an annual growth of 75% when compared with 6.6 million in 2009.

Since May 2008, ISG Project Company has been operating the airport pursuant to the Implementation Agreement and will operate ISG Airport until February 25, 2030.

ISG Project Company has invested €472 million in enhancements of ISG Airport, including the construction of the new international terminal, airport hotel and car park. The ISG Airport facilities include one runway, an apron, three fuel tanks, three terminals, a three-storey airport hotel with 128 rooms, a two-storey VIP building with terminal connection, a four-storey car park with a capacity of approximately 4,700 vehicles and 70 buses and a tri-generation electricity generation facility with an installed capacity of 4 MW. ISG Airport operates 24 hours daily and uses Instrument Landing System – CAT 2. ISG Airport currently operates a single concrete runway with a strip length of 3,000m and a width of 45m. The runway is served by a full-length parallel taxiway, two rapid exit taxiways and three runway entry points located in the centre of the runway and at either ends.

The new international terminal has 8 gates, 16 passenger boarding bridges and 36 remote boarding positions. In addition, the terminal has 112 check-in counters, 24 common use self-service check-in kiosks and 20 immigration counters. The terminal offers a 5,200sqm food & beverage area and a 4,500sqm duty-free shopping area, the latter only for international flight passengers. In addition, the terminal includes a 400sqm conference centre.

PRISTINA INTERNATIONAL AIRPORT (PIA AIRPORT)

PIA Airport is located approximately 15km southwest of Pristina, the capital of Kosovo. It is the only international airport in Kosovo and the only port of entry for civilian air travellers to Kosovo. It serves a catchment area with a population of approximately 2.5 million. Passenger throughput is driven primarily by diaspora traffic. The main destinations are Germany, Austria and Switzerland. In 2010, PIA Airport handled approximately 1.3 million international passengers.

Our parent, Limak Construction, together with Aéroports de Lyon S.A., was granted a concession to operate PIA Airport on a BOT basis pursuant to the terms of a Public Private Partnership Agreement with the Republic of Kosovo (“ROK”) signed on August 12, 2010. PIA Airport will be operated and upgraded by Limak Kosovo International Airport JSC (“LKIA”), the project company, in which our biggest shareholder Limak Construction currently owns a 90% stake, with the remaining 10% held by Aéroports de Lyon S.A., the operator of Lyon-St. Exupéry Airport, is expected to take-over the operations in April 2011.

Limak Yatırım expects to own a 49% stake in LKIA. Pursuant to the agreement, the project company has the right to operate PIA Airport for a period of 20 years following handover. The concession includes all airport operations with the exception of certain governmental services including air traffic control, aviation accident and incident investigations and police, customs and immigration services.

In addition to operating the existing facilities, the project is obliged to construct a new terminal and enhance other airport facilities which includes the construction of a new terminal and related facilities. The total estimated capital expenditure for upgrading PIA Airport is €130 million, of which a significant portion is planned to be used for construction of the new terminal building. After completion of the new terminal, all landside and airside activities, which are currently performed in the existing terminal, will be moved to the new terminal and the existing terminal will cease to operate.

Currently, 21 airlines are operating flights at PIA Airport, serving 29 international destinations. In terms of the number of passengers, Edelweiss, Belle Air, Austrian Airlines and Air Berlin are the largest operators.
passengers’ end destination may not utilise RFID technology, traditional bar coded bag tags must also be printed. While all of this accrues additional cost, Svendsen outlined that the airport was keen to take responsibility for the project.

He said: “The main cost for this was covered by the airport but the main benefit is for the airline. This is one of the main discussion points when you consider adopting RFID tagging but, for us, we take responsibility and ownership of all passengers who use Aalborg Airport.”

Lisbon Airport, which adopted RFID-only baggage handling for transfer passengers in 2008, also covered the entire cost of the implementation of the next-generation baggage handling system in the then-new transfer terminal. Since it’s installation, the system has recorded near-perfect results, with operating costs reportedly similar to that of the traditional baggage handling systems.

“Airports and airlines can improve significantly by changing old barcode technology to RFID technology in existing baggage handling systems,” explained Lyngsoe Systems’ Jan Poulsen. “The manual encoding process will be minimised due to the significantly higher read-rate on baggage tags with RFID than traditional baggage tags without RFID, and that leads to more efficient use of the theoretical capacity in a baggage handling system.”

VANDERLANDE’S SMART BAGGAGE HANDLING

What challenges are shaping today’s baggage handling strategies? Top of the list, of course, is cost control. But airports are also faced with growing passenger numbers, higher peaks and more self-service. In many regions staff are hard to find and retain for what are often heavy manual tasks. Available space for growth is often limited. It’s clear that effective and reliable IT is a key factor in meeting these challenges. Smart controls and automated handling enable efficiency, speed and reliability of operations to be optimised. This results in cost savings, reduced manual labour requirements and improved working conditions.

Baggage handling is changing to a controlled, demand-driven process, in which bags are managed dynamically and on-demand, as required for flight building. Baggage flows are not stable and are subject to peaks at busy times. Scaling systems and manpower for peak demand is clearly wasteful for resources. By disconnecting demand and supply using buffers, make-up peaks can be shaved and tailored to available resources, creating a more constant, controlled flow to the make-up positions.

The on-demand flight make-up process depends on automated, intelligent bag storage. This allows make-up opening times to be shortened, labour requirements to be reduced, and higher volumes to be handled within existing space constraints. The Vanderlande BAGSTORE, based on crane/racking technology, provides high storage density, 100% availability and fast, individual access. Furthermore, a bag store increases passenger satisfaction by longer check-in opening times.

Working conditions are greatly improved by introducing make-up on demand in combination with automated loading. With the Vanderlande BAGLOAD concept, delivered in partnership with Grenzebach Automation, handlers no longer need to do the heavy part of manual loading of bags into carts or containers. This reduces risks of injuries caused by conventional heavy, stressful manual handling.

Q BAG TAG

As part of Qantas’ Next Generation Check-In programme – which provides passengers with a variety of self-service options – the RFID Q Bag Tag is currently being rolled out. The reusable tag removes the need for passengers to print and attach temporary tags for every journey and they can currently be used in Perth T2, Sydney T3 and Melbourne T1 domestic terminals, while it will be rolled out on a widespread basis across Australia throughout this year.

However, as opposed to the Aalborg and Lisbon airport instances, in this case it is the airline which has taken responsibility for the installation of the equipment. At Sydney Airport, for instance, RFID tunnels have been installed to ensure the smooth delivery of the bags through the existing system, while Qantas has installed Auto Bag Drops, newly designed check-in counters, four zones of self-service kiosks and customer service points.

As the information on each tag is synchronised with the passenger’s boarding card or Qantas Card information, Q Card readers have also been installed, along with baggage repack areas and weighing scales. While the infrastructure upgrade has been significant, it has been carried out at no cost to the airport itself.

Although the uptake of next-generation bag tags has been relatively slow, as RFID continues to prove its worth as a long-term, financially viable investment, an increasing number of airports and airlines may well be convinced to further explore next-generation bag tags as a solution to the problem of the lost bag.
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The central idea behind TMT The Mobile Terminal is to provide infrastructure as quickly and simply as possible. Its flexibility means that the solution can be used to accommodate unexpectedly fast traffic growth, major events in an airport’s catchment area, and the renovation and extension of existing terminal facilities. Melcher explained that the terminal can also be used by airlines to try out new flight destinations.

The Mobile Terminal can be installed and disassembled within one week, and reused at other locations. The base model comprises a TMT Departure module and a TMT Arrival module, which include all necessary facilities and equipment to handle one flight, such as an A320 or 737, in a low-cost configuration – around 180-200 passengers – within two hours. The modular structure of the TMT solutions allows a flexible, customised configuration of the functional units inside the terminal, as well as customised solutions with regards to the overall terminal size and capacity.

**FLEXIBLE, SUSTAINABLE SOLUTION**

The 310sqm facility at Geneva International Airport will provide additional capacity for the increased traffic during the winter season, when a significant number of passengers use the airport as the gateway to the surrounding mountains and ski resorts. The airport will use The Mobile Terminal during the winter season and will remove it in May this year – it will then be installed again for the next winter season.

Melcher said: “Geneva International Airport required urgent capacity and is very happy with this new capacity for the winter season. The feedback from the airport has been very good – they like the atmosphere in this kind of temporary building. Passengers also like it – it is not a tent; it brings an atmosphere of comfortable surroundings like a fixed building.”

As a development partner, Geneva International Airport will support The Mobile Terminal by allowing the company to conduct product related research when it is not using the facility, and also to demonstrate the facility to other potential clients.

“It has been years now that we have been looking for a temporary solution that allows us to provide additional handling space flexibly on our airport premises and that at the same time still offers convenient service levels for our passengers,” said Robert Deillon, Geneva Airport’s general director.

In addition to providing a solution in the busy winter months, the airport also plans a major terminal expansion during which it will need a mobile terminal solution to secure smooth operations. Deillon described it as a “quadrature of the circle” for a single product to meet all their needs but is convinced that “TMT has managed to do so”. Melcher has ambitious plans for TMT The Mobile Terminal, particularly in emerging markets in Eastern Europe, Asia and Latin America. “In the next three years, we are targeting 20 to 25 mobile terminals worldwide,” he said. Indeed, the effectiveness of the terminal solution during major events in an airport’s catchment area means discussions are already underway with the Russian market with regards to the 2014 Winter Olympics, which take place in Sochi, and the 2012 European Football Championships in Poland and Ukraine. TMT The Mobile Terminal is also exploring the possibility of renting its terminal solutions for short-term periods.
Dublin Airport Authority is focused on developing sustainable passenger traffic at Shannon and has a range of incentive schemes that offer discounts of up to 100% on airport charges for new routes. The result has been several new routes and increased frequencies in recent months, including the launch of new Aer Lingus Regional services to Manchester, Birmingham, Glasgow, Edinburgh and Bristol, and new Aer Lingus services to Gatwick and Paris-CDG. Indeed, Ryanair has also expanded its presence at Shannon recently with the commencement of a new Fuerteventura service in February, as well as the reinstatement of its Nantes, Malaga and Palma-Mallorca services.

However, Ryanair is demanding that Shannon Airport pay it €4.70 for every passenger the airline brings to the airport. The airline claims its current operation at Shannon handles 300,000 passengers per year and it wants the airport to waive all charges and instead pay the airline for every passenger above that level. This is despite the 300,000 figure quoted being more than 100,000 below the airline’s current indicated traffic level at Shannon for 2011. Ryanair will also not pay landing or aircraft charges at Shannon for what it defines as any new passengers. Other demands include free check-in desks, free offices and free communications. Ryanair also insists the DAA returns the €3.7 million paid to settle the High Court case in January.

The settlement related to Ryanair’s failure to honour the commitments of its previous five-year agreement at Shannon Airport, which ran to April 2010. Ryanair also agreed to pay the DAA’s legal costs, amounting to several hundred thousand euro. Under the five-year agreement, the airline received a substantial discount on airport charges – between €1 and €2 per passenger rather than the standard €4 – in return for carrying an agreed number of passengers, rising to two million by April 2010. Ryanair met its targets for the first three years, but failed to do so in year four and then announced it was scaling back its Shannon operations. Therefore, under the terms of the agreement, Ryanair was required to pay the DAA compensation amounting to the full airport charge on the shortfall in passengers. The airline tried to invoke a ‘force majeur’ clause, claiming that the Irish government’s introduction of a €10 air travel tax made it impossible to reach the agreed targets. The DAA rejected this and launched the legal action, resulting in the €3.7 million out of court settlement.

In addition to failing to meet passenger targets, Ryanair also failed to deliver the promised tourist numbers. When Ryanair launched the deal, it claimed that 80% of traffic into Shannon would be inbound tourists. However, on many of its European routes, 80% of traffic was attributable to Irish passengers travelling abroad with only 20% being inbound tourists.

Brian O’Connell, Chairman, Shannon Airport Authority, explained that Shannon Airport cannot pay an airline for passengers, as that would result in financial ruin. “We value Ryanair’s current contribution to our passenger numbers, but...”
there was no option but to reject the unrealistic demands they set out in their recent letter,” he said. “At a time when Shannon Airport is already loss making, there is no possible way we could pay Ryanair, or any other airline, for delivering passengers. It would be ruinous for the airport.”

Passenger growth is a key objective for the airport, in particular tourist passengers from central Europe and southern Germany. “We would welcome proposals from all airlines, including Ryanair, who offer such services and central to any such arrangement would be that in the region of 80% of these passengers would be inbound, in line with the traditional market we had in Shannon over 10 years ago. The region is continuing to under-deliver the quantity and quality of inbound passengers for the tourism product we have here,” O’Connell commented.

Michael O’Leary, Ryanair’s famously bombastic chief executive commented “Ryanair is the only airline willing and able to deliver dramatic new route and traffic growth at Shannon and the refusal by the DAA of Ryanair’s 1m passenger growth offer proves, yet again, that Dublin Airport Authority has no interest in traffic growth at Shannon. If the DAA was ‘committed to incentivising growth’ it would have accepted Ryanair’s offer of 1m growth passengers at Shannon, on similar terms to those currently enjoyed by Aer Lingus at Dublin.”

The DAA strongly rejects Ryanair’s claim that the airline is seeking an extension of an existing incentive scheme available at Dublin Airport, insisting the demands bear no relation to any existing scheme at a DAA-owned airport. “The claim by Ryanair that Aer Lingus has such a deal in Dublin is completely untrue. No airline is paid money to bring passengers to any of DAA’s three airports,” said O’Connell.

He added: “We are in constant contact with airlines in relation to the opportunities at Shannon for new short-haul and long-haul services. We are also promoting use of the US Customs and Border Protection (CBP) facility at Shannon, which allows passengers to clear all US Customs, immigration and agriculture checks prior to departure. Shannon and Dublin are two of only a handful of airports outside North America and the Caribbean to offer this service to passengers.”

**INCENTIVE PROGRAMMES**

DAA has a range of incentive programmes for airlines launching new routes at all three of its Irish airports. Under these schemes, airlines pay no charges during the first year of a new route and can also qualify for no charges for all passengers, if and when a target of 23.5 million passengers is reached at DAA’s three airports this year.

“For new long-haul routes at Shannon we offer annual discounts of 100%, 90%, 75%, 50% and 25% on passenger charges, aircraft parking, air bridge and runway movement charges over a five-year period – a full 100% discount in year one reducing to 25% in year five,” explained O’Connell. “For new short-haul routes operating on a year-round basis from Shannon, annual discounts of 100%, 75% and 50% on passenger charges, aircraft parking, air bridge and runway movement charges are available over three years – a full 100% discount in year one reducing to 50% in year three. For short-haul routes operating on a seasonal basis, seasonal discounts of 60%, 40% and 20% on passenger charges, aircraft parking, air bridge and runway movement charges apply over a three-year period.”

Ryanair has, at one time or other, operated non-stop flights to almost 50 destinations across Europe from Shannon. The number of destinations served at any one time peaked in 2008 at around 30. Between the summer of 2009 and 2010 Ryanair reduced its network from 25 destinations to just 10. Ryanair’s capacity withdrawals were responsible for around 90% of the decline in passenger numbers at Shannon Airport, which fell from 2.8 million in 2009 to 1.8 million in 2010. Ultimately, the business evolution of airports in Europe in the past 20 years, means that the non-negotiable terms set out by Ryanair are a real challenge to many of Europe’s regional airports. While Shannon Airport is committed to incentivising growth, that must clearly be achieved in a way that is financially viable for both the airport and the airline.
Having been constructed in 2003 as a joint venture between the airport’s operator, Flughafen München GmbH (FMG), and Lufthansa to handle hub traffic for the German flag carrier and its Star Alliance partners, Terminal 2 is expected to handle its full quota of 25 million annual passengers by the end of this calendar year.

The construction of the new satellite facility is the latest step in the long-term relationship that has been established between airport and airline and as with Terminal 2 itself, the project will be jointly funded, with FMG footing 60% of the cost and Lufthansa covering the remaining 40% of the €650 million development.

Designed as an addition to the existing baggage sorting hall on the apron to the east of Terminal 2, a 600m pier will allow for the addition of 52 gates. As it is not a standalone terminal, passengers using the facility will use the check-in and ticket desks and the arrivals area in Terminal 2 before transferring via an underground transportation system between the buildings, which will take just 50 seconds.

In 2010, Munich Airport experienced a year-on-year of increase of +6% in passenger traffic, with almost 35 million passengers passing through the airport over the 12-month period and according to Kerkloh, “the planned capacity expansion will take Munich Airport to a new dimension”.

He said: “We are gaining handling capacity for an additional 11 million passengers a year, which puts us in the order of magnitude of today’s Frankfurt Airport. This will enable us to maintain the high standards of quality achieved by our airport today as a connecting hub even with the anticipated traffic volume in the future.” This increase in traffic is expected to result in as many as 58 million annual passengers by 2025.

German high pressure water jet systems manufacturer Weigel has recently completed over 40,000sqm of rubber removal services at the Moron Air Base runway.

Rubber deposits were already quite significant on both touchdown zones, as the previous rubber removal intervention took place more than three years before. One of the most recent TrackJet models successfully removed rubber on two different pavement types, with homogeneous results and without damaging the surface, paint marks, sealings or the arresting system. Temperatures of over 35°C were not a problem for the equipment, designed to work in tougher environments, such as in the Middle East, where several TrackJets are already in use.

Airfield Manager, MSgt Jonathan Sollisch, said: “In 17 years of experience, I must confess I’ve never seen such an efficient removal method.” He also noted the equipment’s capacity to control the water jets according to the thickness of the rubber layer prevented damage.

Ruben Figueiredo, from Weigel/TradeTarget, who oversaw the project, explained: “After almost 60 consecutive operating hours, we left Moron without one single failure and with the customer pleased. That’s our goal for all missions, on asphalt or concrete pavements, on military or commercial airfields, removing rubber deposits or paint marks.”

© K+P Koch+Partner, Munich

Weigel has recently completed over 40,000sqm of rubber removal services at the Moron Air Base runway.
KOCH+PARTNER APPOINTED GENERAL PLANNERS FOR MUNICH AIRPORT SATELLITE FACILITY

Koch+Partner, the architects of Terminal 2 at Munich Airport, have also been commissioned as general planners with planning the satellite terminal.

In a first stage, the satellite will be built as an expansion of the existing baggage sorting hall on the eastern apron, with a handling capacity of about 11 million passengers/year, in addition to Terminal 2. The midfield terminal is a functional and operational extension of Terminal 2 without its own landside connection. Passengers departing and arriving from the satellite will always check-in and exit at Terminal 2. Via generously glazed stations, the passengers are led to an underground train, which takes them from Terminal 2 to the satellite in just 50 seconds.

Simplicity, clear lines, obvious circulation routes and good orientation are the design principles, as they were for Terminal 2.

Starting on site will be in autumn 2011; operation is scheduled for the 2015 summer flight plan.

World-Class Experience

Covering an area of 123,000sqm, the Terminal 2 satellite facility will house two Lufthansa Service Centres with 24 transfer gates and 42 passport control stations. Five new Lufthansa lounges will also be introduced, while retail and food & beverage (F&B) facilities will account for 9,000sqm of floor space.

Kerkloh continued: “The satellite will mean pushing quality to the next level for everyone concerned. Passengers will have easy and convenient access to their aircraft through the additional jet bridges gained in the expansion. Today we are already one of the world’s best airports according to passenger surveys. With the satellite terminal we will be able to raise this quality level even higher.

“The building itself, designed by the Munich architects Koch+Partner, who created the existing Terminal 2, is a new concept still in keeping with that building’s appearance. The new facility, floodlit with natural light from its wide glass facades, will offer a high-quality airport experience.”

In preparation for future growth, Munich Airport also has plans in place for the construction of a third runway. While the airport can currently cater for 90 air traffic movements per hour, the addition of a third runway would allow for this to be increased to 120. “To cope with the current demands from airlines and the anticipated future growth, the third runway is of vital importance to us,” Kerkloh concluded.

“The new satellite facility is a decisive step for Munich Airport in keeping pace as a premium hub competing at the European and global level. With this increase in capacity, we are enabling Munich and Bavaria to maintain their excellent links with markets and major cities all over the world.”
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The Spanish government’s decision to privatise Aena – which operates 47 airports in Spain – was announced in December and since then, the creation of Aena Aeropuertas S.A., which will become functional from June, has been approved.

As part of the plan, up to 49% of the newly created airports division will be open to private investment and the management of the nation’s two largest airports – Madrid Barajas and Barcelona El Prat – will be privatised on a concession basis.

The privatisation is a response to the change in nature of the aviation sector over the last two decades and the move away from the current public-owned structure is aimed at introducing greater management flexibility to ensure the long-term efficiency and competitiveness of Aena’s airports.

NEW TERMINAL AREA

As the main airport for the Region of Murcia, Alicante Airport has experienced significant growth since the turn of the century. Having handled 6 million passengers in 2000, this increased to almost 9.4 million in 2010 and in order to cater for the sharp rise in passenger traffic, the New Terminal Area, which will be officially unveiled at the end of March, brings Aena’s investment in the airport since 2004 to almost €630 million.

The new terminal itself comes at a cost of €417 million and covers an area of 333,500sqm. Located perpendicular to the runway, the terminal building will increase the number of check-in desks from 52 to 96, and the number of boarding gates from 16 to 26, 15 of which will provide direct aircraft connectivity. In turn, the airport’s capacity will also be increased to 20 million.

Martínez-Cava said: “This major renovation of the airport infrastructure is the biggest that has been undertaken since its opening in 1967. It will become a large airport that will boost tourism and business dynamism in Alicante.”

He continued: “It is a significant qualitative leap in the infrastructure at all levels. We are talking about a terminal where natural light is the protagonist.”

The glass walls provide impressive views of the Mediterranean, which according to the airport’s managing director, reflects the “modernity and quality of service” on offer.

This commitment to quality is also in evidence in the commercial offering. A variety of retail outlets, including brands such as Swarovski and Desigual are complemented by a comprehensive food and beverage (F&B) offering, which ranges from the 2 Michelin Star Aire Tapasbar, to the likes of Starbucks and Subway.

Every aspect of the New Terminal Area is state-of-the-art. In addition to the front line passenger processing facilities, the baggage handling system also utilises the very latest technology.

At 18km long, the system allows for 7,880 bags to be processed per hour, while in the baggage reclaim hall, there are 14 belts, plus two additional belts for special baggage.

A six-storey, 4,200-bay car park, which provides direct connectivity to the terminal, is also in place, in addition to a bus station with 57 covered bays.

As part of Aena’s ‘Plan Alicante’, the airport’s airside facilities are also being upgraded. As well as the introduction of additional aircraft
parking space, the apron is also being expanded and a rapid taxiway for arriving flights is being constructed as part of the airfield expansion.

ENVIRONMENTAL FOCUS

Martínez-Cava was also keen to highlight the focus that has been placed on environmental efficiency throughout the development process. "Caring for the environment is a priority for Alicante Airport and has been taken into account in all aspects of the enlargement," he said.

During construction of the New Terminal Area, excavated soil and treated water have been reused, and ficus and palm trees have been planted. In terms of the architecture, greater light input has been achieved through skylights and the curtain wall, while energy efficiency has also been improved with solar filters and double-glazed glass.

"In the building, energy costs are reduced with an integral management through a centralised control. An automatic lighting control has been installed to take advantage of natural light and it will use low energy lighting and an automatic temperature control," Martínez-Cava added.

Although considerable investment has been made in modernising and expanding Alicante Airport over the course of the last seven years, further plans have also been mooted regarding further development of the airport in the near future.

Martínez-Cava explained: "Aena has made a major commitment to intermodality and in 2014 it is expected that the airport will be connected by train with the city of Alicante.

"Furthermore, we are reviewing the master plan of the airport in which it is being considered within the General Airport System to build a second runway parallel to the one that exists at the moment."

While the new facilities are more than capable of handling the anticipated increase in passenger traffic, the addition of a second runway is something that is on the medium-term agenda for Aena and Alicante Airport.

Martínez-Cava: "This major renovation of the airport infrastructure is the biggest that has been undertaken since its opening in 1967."

Martínez-Cava: "We are talking about a terminal where natural light is the protagonist."
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KEN O’TOOLE
Director of New Route Development
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EUROPEAN AIRPORT TRENDS 2010

PASSENGER NUMBERS UP OVER 4% WITH ISTANBUL’S AIRPORTS LEADING THE WAY

BY RALPH ANKER, EDITOR, ANNA.AERO

Based on anna.aero’s comprehensive database of traffic data and trends for over 300 European airports, it is estimated that passenger numbers handled at Europe’s airports in 2010 grew by around +4.2%. If we factor in the impact of the Icelandic ash cloud, which caused around a -20% decline in traffic for April, then the underlying growth for 2010 is probably between +6% and +6.5%. Analysis of data for 36 European countries shows that the performance of individual countries varied between Lithuania and Russia (growth of +24%) and Ireland (a decline of -13%). Thirty of the 36 countries analysed reported growth last year with three Western European countries (Greece, Ireland and the United Kingdom) joined by three Central European countries (Czech Republic, Slovakia and Slovenia) in reporting a fall in air passenger demand.

The graph highlights the five biggest European country markets; the UK (214 million airport passengers), Spain (193 million), Germany (191 million), France (143 million) and Italy (140 million). Turkish airports passed the 100 million mark for the first time in 2010 and given their impressive growth in recent years it may be as soon as 2013 or 2014 that Turkey moves into fourth place in Europe.
Given the impact that a travel tax had on Irish air travel demand (along with one of the more serious economic collapses across Europe) it will be interesting to see what impact the new Austrian and German air travel taxes, introduced at the beginning of 2011, will have on air travel demand. In January, at least, passenger numbers at German airports were still +7.5% up on January 2010.

**ISTANBUL’S AIRPORTS DO THE DOUBLE**

Istanbul’s two airports (Atatürk and Sabiha Gökçen) both managed to come top in their respective size categories, vividly demonstrating the vibrant growth in the Turkish air travel market. The winners in the other two size categories (Brussels Charleroi and Kaunas) both enjoyed impressive low-cost carrier (LCC) traffic growth in 2010. The LCC influence also helps explain the appearance of Barcelona, Porto and Trapani in these rankings. However, this winter Ryanair’s monthly year-on-year growth has fallen to well under +10%, as higher fuel costs, increased taxation (leading to higher fares) and seasonality of demand have combined to encourage the airline to grow winter capacity relatively modestly.

Other factors influencing growth at particular airports were Alitalia in Rome, the opening of the low-cost ‘Go’ pier at Copenhagen airport, Lufthansa Italia and easyJet growth at Milan Malpensa, and the relative strength of the German economy (and hence Lufthansa) at Frankfurt and Munich.

The airports in each ACI EUROPE category that reported the biggest percentage fall in passenger numbers were London Gatwick (Group 1, -3.2%), Dublin (Group 2, -10.1%), Glasgow (Group 3, -9.3%) and Shannon (Group 4, -37.2%). The fact that all four of these airports are in either the UK or Ireland, where low-cost carriers have in the past been most influential in stimulating demand, is food for thought (as is the fact that both have suffered from increased taxation on air travel), though the fact that the two countries were also among the hardest hit by the global recession is obviously a significant factor as well.

Using ACI EUROPE’s airport size classification we can see which airports reported the highest growth in 2010.

<table>
<thead>
<tr>
<th>Category</th>
<th>Top Growers</th>
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<tbody>
<tr>
<td>&gt; 25 million passengers (Group 1)</td>
<td>Istanbul IST (+7.7%)  Rome FCO (+7.4%) Barcelona (+6.9%) Munich (+6.2%) Frankfurt (+4.1%)</td>
</tr>
<tr>
<td>10-25 million passengers (Group 2)</td>
<td>Istanbul SAW (+74.2%) Antalya (+18.7%) Copenhagen (+9.1%) Vienna (+8.7%) Milan MXP (+8.0%)</td>
</tr>
<tr>
<td>5-10 million passengers (Group 3)</td>
<td>Brussels CRL (+32.3%) Ankara (+27.5%) Moscow VKO (+22.4%) Izmir (+20.7%) Porto (+17.1%)</td>
</tr>
<tr>
<td>&lt; 5 million passengers (Group 4)</td>
<td>Kaunas (+77.3%) Trapani (+57.5%) Brindisi (+47.2%) Rimini (+45.1%) Diyarbakir (+32.5%)</td>
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SSP’s extensive brand portfolio encompasses some of the world’s best-known brands, top class local names and award winning concepts tailor-made to really capture the essence of a region. We pride ourselves in our ability to showcase the best a destination has to offer, as we’ve done in Dublin Airport through a blend of brands including Flutes Champagne & Wine Bar, The Slaney and Caviar House & Prunier. The return of our customers time and time again reflects our success in creating distinctive locations that ideally suit their needs and wants. We are SSP, The Food Travel Experts.
ETRC DEDICATED TO OVERCOMING TRAVEL RETAIL CHALLENGES

WHILE A STEADY INCREASE IN PASSENGER NUMBERS AND THE IMPENDING FIRST STAGE LIFTING OF THE RESTRICTIONS ON LIQUIDS, AEROSOLS AND GELS (LAGs) MAY INDICATE A POSITIVE OUTLOOK FOR TRAVEL RETAIL, THE INDUSTRY IS STILL FACING A NUMBER OF SIGNIFICANT CHALLENGES. RYAN GHEE SPOKE TO FRANK O’CONNELL, PRESIDENT OF THE EUROPEAN TRAVEL RETAIL COUNCIL (ETRC).

Following the downturn in passenger numbers as a result of the 2008 economic recession, a number of obstacles – ranging from the restrictions on the carriage of LAGs, to the single bag carry-on rule – have combined to pose a genuine threat to the future of travel retail.

While some of these threats have been overcome – including the removal last year of a World Health Organization (WHO) provision from its Draft Strategy to Reduce the Harmful Use of Alcohol, which had proposed taxing duty free alcohol sales – many still remain in what is proving to be a testing time for the industry.

However, the proposed first stage lifting of the restrictions on LAGs, which is currently scheduled for 29 April, could prove to be a positive step in terms of driving sales for the sector, according to O’Connell.

“Our consistent position has been that we will support the lifting of restrictions because it makes sense from our point of view as retailers, but only when we can ensure that what replaces the current restrictions is a solution that works better for the passenger,” he said.

Perhaps the most significant of the threats is that to duty free tobacco sales. A WHO Working Group has been established to examine the use of price and taxation policies as a means to reduce the demand for tobacco, while the WHO Tobacco Free Initiative’s Technical Report on Taxation Policies of Tobacco Products has also claimed that duty free sales undermine national taxation policies.

O’Connell said: “The duty free sector operates in a very limited environment. It’s highly controlled and regulated, so we have always felt that it’s disingenuous to suggest that duty free sales undermine national taxation policies.”

Refuting the claims that duty free sales contribute to the illicit trade in tobacco, he continued: “We have to work very closely with the governments and Customs authorities so it’s a very tightly regulated and constrained industry. We also have to remember that the duty free tobacco industry accounts for less than 1% of the global tobacco industry.

“The reality is that the illicit tobacco trade damages duty free as well so we’re happy to continue to engage with the relevant authorities to do all we can to help combat this and protect the integrity of the duty free sector.”

The next round of negotiations on the Illicit Trade Protocol will be held in early 2012 and O’Connell explained that the “next 9 to 10 months are critical” and that the industry must unite to challenge the threats posed.
He said: “It’s really important that the duty free industry continues to engage with the respective governments where they operate and communicate both our concerns and our support for the combating of illicit trade. This does not only concern the duty free tobacco industry, but the whole duty free industry and our partners, because we’re essentially working on behalf of the airports. The current consultation on the EU Tobacco Products Directive raises the issue of a potential tobacco display ban at airports and we’re working alongside ACI EUROPE and the airports to tackle this.”

**ONE BAG RULE**

The single bag carry-on rule – which states that passengers can only carry one piece of hand luggage on board their flight – has also proved to be another source of frustration for the travel retail industry.

“IT has been enforced sporadically at different airports and that in itself is a problem for the passenger because they are unsure of what the rules are,” O’Connell explained. “One of the biggest problems for retailers is having customers feel uncertain about what they can and can’t do.

“This is a very serious issue and we need to find a way of dealing with it. Again, ACI EUROPE is doing a lot on this front in terms of coming up with a Recommended Practice.”

This Recommended Practice was issued last year and advises that airports should ensure that their Airport User’s Regulations require users not...
to impose any rule or implement any practice in relation to their passengers, which may directly or indirectly affect the airport’s non-aeronautical activities or operational procedures.

In order to protect the travel retail channel and distinguish it from high street retail, the ETRC is also seeking to expand the Espace Voyageur concept, which has been in place since 2005 in France and differentiates the French travel retail market from domestic, high street retailing.

As part of this, as the European Union works on implementing an EU-wide food labelling regulation, the ETRC is actively working to ensure that travel retail is exempt from any such ruling.

O’Connell said: “This is something that we’ve been involved in for some time and we want to make sure that any labelling regulation takes into account travel retail and our needs. Foods need to be labelled in a way that represents the international market that we serve and it can’t be based on regional regulations, so we’re working with the European Commissioner to work out a solution.”

He continued: “We want a distinct channel for travel retail and this would require the authorities, when producing retail legislation, to take into account the impact that it will have on travel retail.

“We’ll be working closely with ACI EUROPE on all of these issues because they affect us all and it’s very important that we continue to engage so that we have a strong voice in Europe.”

**BUTLERS’ TRAVEL RETAIL INNOVATION**

Established in 1932, Butlers Chocolates pioneered the development of the premium chocolate category in Dublin Airport, at a time when the category was in its infancy on the Irish high street. As well as its exclusive range of products for travel retail, Butlers is also well known for its unique café and chocolate shop concept – Butlers Chocolate Cafés, both in Ireland, where there is a flagship café at Dublin Airport, and internationally.

Most recently, Butlers Chocolates has opened two new Chocolate Café Kiosks at both the domestic and international departure lounges at Jinnah International Airport, Karachi. This new Chocolate Café Kiosk format will serve to further strengthen the Butlers brand as the company continues to expand internationally. For operators, this is an interesting new format using a proven concept. The brand is now available in over 25 countries worldwide as well as 50 international airports (including Heathrow, Dubai, Bahrain, Lisbon, Schiphol, Delhi, Abu Dhabi and Sydney).

The travel retail industry recognised Butlers Chocolates’ contribution to the sector in October 2009 when the company was awarded the prestigious Supplier of the Year award at the Frontier Awards in Cannes.

Butlers Chocolates will be exhibiting in the Irish Pavilion at this year’s ACI EUROPE Airport Trading Conference and would be happy to arrange meetings in advance.
MAKING A DIFFERENCE

RICK STAVAST OF SSP EXPLAINS HOW NEW TECHNOLOGIES ARE BEING USED TO TRANSFORM THE AIRPORT PASSENGER EXPERIENCE.

Our business is all about making a traveller’s journey more pleasant, and ensuring their experience at the airport is a good one. While of course the traditional things that make a bar or restaurant great – whether that’s charming service, a relaxing environment or exceptionally good food – are essentials that must never be ignored, new technologies are opening up a wealth of possibilities when it comes to pleasing our customers.

Social networking has gone from being the preserve of teenagers and geeks only a few short years ago, to become an essential part of most people’s lives. Concession companies and airport operators are responding to this trend, but our approach must be coordinated. Passengers do not want to be bombarded with information or spammed with irrelevance. Our challenge is to work with airlines, airport operators and other parties who are concerned with how passengers spend time at airports so that we provide seamless access to the information they need in one, easy-to-use format.

Any foray we make into the realm of social media needs to be carefully considered. We must have clear objectives so we understand why we are doing it, and we also need to know whatever initiatives we introduce will deliver a significant and measureable return on investment.

If we are to capitalise on these new ways of creating dialogue with our customers, we have to ensure we have structures and systems in place to respond to what they say in a timely and appropriate manner. We have an opportunity to communicate with our customers in ‘real time’ – an activity that requires particularly skilful management, especially for a company such as SSP with operations in 30 countries.

But enter the conversation we must. People take far more notice of what their friends have to say than the marketing messages of corporate and the power is shifting. It’s vital that we start to engage with communities right now.

A HELPING HAND

New technology can be used on a very practical level to make passing time while waiting for a flight easier or more pleasant. For example, technology is a central focus of our new offers at London City Airport, (scheduled to open later this summer), and we will have staff on duty at the terminal who are equipped with handheld devices that allow passengers to book a table or even order food at our City Bar and Grill.

The launch of PowerKiss wire-free mobile phone charging at airports across Europe is another innovation that’s having a big impact on the passenger experience. PowerKiss allows visitors to our bars and cafés to top up their phone batteries without having to ‘plug in’. Passengers simply collect a charging ‘ring’ from the counter, and can then charge their phone by laying it onto PowerKiss enabled tables.

The service is already up and running at Helsinki, Frankfurt and six airports across Norway, including Oslo, and it will be rolled out to an additional 30 airports, including Charles De Gaulle, Stockholm-Arlanda, Malaga, Geneva International and Zurich airports over the coming months.

We know from our consumer research that people’s attitudes to the time they spend at the airport are changing, and they now see that time as a useful opportunity to chat to friends online or catch up on work. By providing facilities such as phone charging, or Wi-Fi connectivity (now expected as standard at an airport), we can help passengers spend their time more productively and more enjoyably.

This is great for our customers, and – as they now no longer have to dash away to make that important business call and are likely to stay for an extra cup of coffee or another glass of wine – it’s a great opportunity for us too.
COMMERCIAL DEVELOPMENT
‘CRITICAL’ TO DAA GROWTH

THE INNOVATIVE RETAIL AND FOOD & BEVERAGE (F&B) OFFERING THAT IS AVAILABLE IN DUBLIN AIRPORT’S NEW TERMINAL 2 SERVES TO HIGHLIGHT THE DUBLIN AIRPORT AUTHORITY’S (DAA) DEDICATION TO COMMERCIAL GROWTH.

RYAN GHEE SPOKE TO PAUL NEESON, DIRECTOR RETAIL, DAA.

INNOVATIVE IMPORTANCE

The average Dublin Airport passenger passes through the airport six times a year and with this in mind, innovation has been identified as a key element of driving commercial revenue. Such examples of innovation are apparent in the likes of the Chocolate Lounge and The Irish Whiskey Collection, while The Slaney Bar offers panoramic views across Dublin city. The DAA also offers a ‘Click & Pick Up’ service for passengers who wish to purchase goods online before arriving at the airport, as well as the ‘Shop & Collect’ facility, for passengers who wish to collect their goods on the return journey.

While the average passenger dwell time in the retail area in Terminal 1 currently stands at nine minutes, the combination of high-quality international and local brands, along with the dedication to innovation, is aimed at doubling this for passengers using Terminal 2.

“Non-aeronautical revenues are absolutely critical to the DAA,” Neeson explained. “The landing charges at Dublin Airport are among the lowest in Europe and well below what you’d expect for an airport of this size. Generating commercial revenue is critical not just in terms of contributing to the cost of this new facility, but also for developing future business for the DAA.”

Having established a world-class commercial offering in the new T2, Neeson explained that attention will soon turn to Terminal 1 to ensure that the commercial facilities meet the newly-set benchmark.

A total of 8,500sqm of the €600 million Terminal 2 is dedicated to commercial facilities and in keeping with Terminal 1 and the DAA-operated Cork and Shannon airports, the retail and F&B offering operates under the name ‘The Loop’ – the commercial branding that was unveiled last July.

‘The Loop’ is based upon specific principles. A commitment to quality, price and innovation is at the heart of the branding, while “de-mystifying” airport shopping, offering high quality customer service and a dynamic event programme are also core values.

“We aim to offer the best department store and shopping mall experience to the passenger and we’re dedicated to offering them well-known, quality brands,” Neeson explained. “We’ve tried to make it very customer focused. We spent a lot of time talking to our customers and what came back was that they were looking for good P&C (Perfume and Cosmetics) and great brands at the right price. It was also interesting that they made it clear that they were looking for good entertainment as well.”

While the demand for established international brands is satisfied with the likes of the Hugo Boss and Jo Malone fashion stores, Terminal 2 also boasts a specifically tailored local offering, through stores such as Irish Memories and House of Ireland.

Neeson explained: “There really was strong competition and this gave us the chance to carefully consider the type of offering we wanted for passengers using T2. In terms of F&B, we’ve brought in some of the best of our local brands and we’ve combined this with something more cosmopolitan and European as well.”
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