INTERVIEW
Dr Stefan Schulte,
Chairman of the Executive
Board, Fraport

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THESE INTERESTING TIMES
24… MONTHS

BY AD RUTTEN, EXECUTIVE VICE PRESIDENT & COO, SCHIPHOL GROUP AND PRESIDENT OF ACI EUROPE

Many of you will be aware of an American television show called ‘24’ about a man dealing with all kinds of extreme situations, surprises and alarming circumstances over the course of 24 hours. Given the shock sensitive nature of the aviation industry, I have sometimes wondered why television studios don’t make more dramas about aviation, invariably involving airports.

As I prepare to hand over my role as President of ACI EUROPE to my successor after the 21st ACI EUROPE Annual Congress hosted by ANA (Aeroportos de Portugal) in Lisbon this June, I look back at the twists and turns that our industry has faced these past 24 months and see that some are certainly worthy of the silver screen. But more than that, taking stock of all we achieved during that time, I am proud of how ACI EUROPE has advanced, strengthening its role for the future.

Indeed, together with the Board and staff of ACI EUROPE, we have done quite a lot to promote and defend the collective interests of our members. This has included dealing with immediate challenges, in particular the string of unprecedented crises and events affecting our industry. At all times, ACI EUROPE was involved, relying on our network of institutional and media contacts to the fullest and standing firm whenever needed.

But our actions have also involved looking at the long-term and charting an ambitious course for ACI EUROPE. To that end, we have conducted a thorough review of the direction and scope of the organisation, reflecting a changing environment and evolving expectations from our members. At all times, our chief objective has been to further reinforce our relevance as a trade association strongly focused on providing value to its membership.

The result has been a new Strategic Plan, which we adopted last year and which will drive ACI EUROPE to 2015. With increased resources for the first time ever – but still well below those available to other aviation associations, we have been faithful to our mantra that small is indeed beautiful and that it can be very efficient. We have built a stable and dedicated team of professionals in Brussels – a team I am not afraid to call our dream team, and we have set our overarching priority on raising the profile of airports as businesses in their own right. Therefore, I am confident that ACI EUROPE will continue to punch above its weight in the years to come.

One of the key directions of our Plan has consisted of developing a more strategic approach to our advocacy activities. We have worked on this through new initiatives such as our 2010 Policy Outlook setting out a vision for Europe’s airports, our certification programme for carbon management, Airport Carbon Accreditation, or our Joint Action Plan on A-CDM (Airport Collaborative Decision Making) with EUROCONTROL and CANSO. The results have reinforced the brand equity of ACI EUROPE, coupled with progressively changing the perception of policy makers about our industry – so that they are more informed about its dynamics and evolution. As you can read in this issue, the White Paper Transport 2050 adopted last March by the European Commission reflects this progress.

Nevertheless, some of the old grudges die hard and we still have some way to go to convert all our critics. Despite radical changes in the aviation market place with airports now facing significant competitive pressures, some still consider us as monopolies treating airlines as cash cows. With only 19% of Europe’s airports revenues coming from airlines and total aeronautical revenues leaving us with an under-recovery of almost €5 billion, nothing could be further from the truth. Certainly, there is no time to rest. The recent security saga on LAGs (Liquids, Aerosols and Gels) reported in these pages reminds us that we can be confronted with very powerful private interest groups. Thankfully, David occasionally wins over Goliath…

Coming back to our Strategic Plan, another key direction has involved developing our role as a knowledge source for members, with a special emphasis on regional airports as well as on re-engaging with those members located outside the EU/EEA – in particular in Russian speaking countries. Finally, we have also revamped our communications. Our new website, about to be launched, and other members-only new communication tools reflect the importance that we attach to reaching out to our extended membership of more than 400 airports in 46 countries.

Looking ahead, challenges of all sorts will not stop coming our way – some more unexpected than others. But I am confident that we are well equipped to address them. For now, with a review of existing European regulations dealing with airport slots, ground handling, noise and State aid in the pipeline at the European Commission, ACI EUROPE is very busy – as usual – ensuring that the voice of airports is heard, defending our industry’s core interest.
IT’S ALL WITHIN YOUR REACH

Split Airport is strategically located on the beautiful Dalmatian Peninsula, the largest peninsula in the Adriatic Sea. Its stunning coastline, unspoilt natural environment and excellent value for money make it into a rare naval code in the Mediterranean.

The airport provides landing and handling services for a variety of aircraft, from small jets to Boeing 747s. It can deal with the arrival and departure of up to ten aircraft and 6,000 passengers at a time, rising to 10,000 on peak days.

The cool climate and the airport have made a great impact and have marked the good growth potential of the Split airport area. Airline companies are showing interest in the region, indicating that Split has all the attributes of a viable alternative to the main European airports.

Pula Airport

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Pula Airport
FRAPORT INVESTS IN FUTURE AS IT CELEBRATES 75 YEARS

FRANKFURT AIRPORT IS GERMANY’S BUSIEST AIRPORT AND IS AMONG THE WORLD’S TOP 10 HUBS. THE AIRPORT CELEBRATES ITS 75TH ANNIVERSARY THIS YEAR – A YEAR IN WHICH IT WILL ALSO, SIGNIFICANTLY, OPEN THE NEW RUNWAY NORTHWEST. FRAPORT IS INVESTING €7 BILLION IN FRANKFURT AIRPORT IN THE PERIOD FROM 2007 TO 2015 TO SUSTAIN AN AMBITIOUS STRATEGY, AS DR STEFAN SCHULTE, CHAIRMAN OF THE EXECUTIVE BOARD, FRAPORT AG, EXPLAINED TO ROSS FALCONER.

It was 75 years ago, in 1936, that Frankfurt’s current airport opened adjacent to Germany’s first autobahn intersection – the famous Frankfurter Kreuz, which today handles around 300,000 vehicles daily. “Location, location, location! We are ideally located in the heart of Germany and Europe, close to the city of Frankfurt, and at the junction of major air, rail, road and water transportation networks,” said Schulte.

There have been many milestones over the years. Frankfurt Airport (FRA) played a pivotal role as the main air hub for the Berlin Airlift of 1948–49 – still the biggest humanitarian airlift in history. The airlift underscored the strategic role of the airport’s central location and its logistics potential. “Incidentally, today we are the busiest air cargo hub in Europe and among the top 10 worldwide,” commented Schulte.

The parallel north and south runways were completed in 1949 and by 1955, Lufthansa was relaunched and became FRA’s largest carrier. The integrated Central Terminal, including a railway station and automated baggage handling system, opened in 1972 – it formed the basis of Fraport’s pioneering intermodal air-rail effort. Terminal 2 was inaugurated in 1994 and CargoCity South was created in the late 1990s.

The Frankfurt Airport company became Fraport AG and went public with an IPO in June 2001. Fraport has developed into a global airport manager with a family of 13 airports that are owned and/or managed by Fraport worldwide. “Starting at Fraport as CFO and then taking over the helm as CEO almost two years ago, I have some personal highlights. Strengthening the company and the airport for the ups and downs of the industry and the global economy has been challenging but essential,” explained Schulte.

“Today, Fraport is a very strong company and our FRA home base is well positioned, with new capacity coming on stream to take advantage of fresh growth coming after the recent global financial and economic crisis. Our development of FRA and Fraport as a diversified business with aeronautical and non-aeronautical business pillars has been important, too.”

Frankfurt Airport is currently at the ‘Reduction’ level of Airport Carbon Accreditation. Indeed, it was the very first airport to become Airport Carbon Accredited, in September 2009 and is currently working diligently on progressing to the next level – ‘Optimisation’.

Schulte: “Today, Fraport is a very strong company and our FRA home base is well positioned, with new capacity coming on stream to take advantage of fresh growth coming after the recent global financial and economic crisis. Our development of FRA and Fraport as a diversified business with aeronautical and non-aeronautical business pillars has been important, too.”

COMMUNIQUÉ AIRPORT BUSINESS: SUMMER 2011 – P7
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Fraport will celebrate its 75th anniversary with a unique event to be held on the new Runway northwest on 25 and 26 June. The event – ‘Happy Landings’ – will celebrate past achievements and future opportunities. 60,000 people from the region, plus 20,000 airport staff with families, will enjoy a static display of aircraft, a multimedia pavilion, live music, live radio and TV broadcasts, as well as exhibition stands from various Fraport departments and airport partners.

YEAR OF GROWTH

In all respects, 2010 can be described as a year of growth for Fraport. The growth momentum has significantly improved profitability, which is important in terms of handling the financial burden of Frankfurt Airport’s huge expansion programme. The airport’s throughput rose by +4% in 2010 to 53 million passengers – an excellent result given that European flights were grounded for several days due to April’s ash cloud crisis, coupled with the severe winter weather at the beginning and end of the year. A record volume of air cargo – 2.2 million tonnes – was also achieved. These figures led to a +9.2% increase in Group revenue to €2.2 billion.

The latest figures for April show +6.7% year-on-year growth of 250,000 passengers. “We have seen a gradual recovery in the global economy. Frankfurt has naturally benefited from this too. The German economy has proven to be robust and international exports remain strong, particularly in emerging markets. Thanks to our huge global route network and numerous carriers at FRA – and a strong home base carrier and system partner in Lufthansa (LH)/Star Alliance – we have rebounded quickly and strongly from the economic crisis that also hit aviation hard,” said Schulte.

The October opening of the new Runway northwest is undoubtedly the most important contribution to securing Frankfurt Airport’s competitive future. It will initially increase the airport’s runway capacity from 82 to 90 movements per hour – and eventually by 50% to more than 120 movements per hour. In the medium-term, the airport’s plans foresee increasing capacity to around 100 movements per hour by 2015 – and with expected annual traffic growth of +4-7%, Frankfurt Airport could be handling 65 million passengers per year by that time.

Schulte explained that the new runway will enable Fraport to increase flight frequencies on certain routes, add new destinations and attract new airlines to FRA. “The new capacity is driving the evolution of FRA into a dynamic airport city. KPMG has just transferred more than 2,100 staff, consolidating various Frankfurt area offices to The Squaire complex at Frankfurt Airport. Simultaneously, KPMG has designated FRA as its new European headquarters, which was formerly based in London,” he said. “The phased 50% increase in runway capacity opens up tremendous opportunities for the many existing players at FRA, as well as new entrants interested in the location and operational advantages of our growing mega-hub. First and foremost, FRA is an intercontinental transfer hub for network carriers and not really suited to low-cost airlines. The LH/Star Alliance carriers currently account for about two-thirds of the traffic at FRA.”

€7BN INVESTMENT

Terminal infrastructure is also being developed – notably the westward extension of Terminal 1, which is known as Pier A-Plus. The project will be complete in 2012, increasing the terminal’s annual capacity by 6 million passengers. Pier A-Plus will provide seven new parking positions for widebody aircraft, including four for the A380. Looking further ahead, plans are also underway for the new Terminal 3, which will have an annual capacity of 25 million passengers. The first phase of Terminal 3 is scheduled to be complete in late 2016 or early 2017.

In recent years, Fraport’s annual investment has reached or exceeded €1 billion per annum. “Even during the economic crisis we continued investing in our new runway and other infrastructure projects. If you add in the investments made by Lufthansa and other airport users, major real estate developments like The Squaire, Gateway
We are committed to self-service, convenience and shorter lines at the airport.

DEDICATION BEYOND EXPECTATION
Gardens, and the Mönchhof logistics park, this investment volume at FRA exceeds well over €10 billion,” explained Schulte.

Pier A-Plus will be used exclusively by Lufthansa and the needs of LH as exclusive tenant have been taken closely into consideration. “We are the owner and operator of passenger terminals at FRA, so naturally this means we work closely with users of these facilities. In the past, we have worked closely with Lufthansa concerning the redevelopment and extension of various areas of Terminal 1,” commented Schulte. “We have also worked closely with major retailers like Heinemann at the new Pier A-Plus. Basically, airport facilities need to take into account functionality, quality and attractiveness for the passengers, flexibility for the future, economics of construction and maintenance, environmental aspects and, last but not least, the requirements of commercial partners on the airport site.”

Detailed planning will commence shortly for the new Terminal 3 – a demand-driven facility to be built in phases. Construction is scheduled to start in 2013 and the first phase is expected to go into operation in 2016/2017.

FRA has also made additional investments in its winter contingency. A second new de-icing pad near the main takeoff runway went into operation last year and the airport is looking at new de-icing areas. “Our fleets of de-icing and snow-clearing equipment will be expanded and we will add more winter services staff. Generally speaking, we met the 2010 winter challenge quite well, but there is room for improvement and we have to meet the requirements of adding a runway and taxiways – and serving more aircraft,” said Schulte.

**INTERNATIONAL OPERATIONS**

Fraport’s portfolio of 13 airports includes majority-owned airports (Frankfurt, Antalya, Lima, Burgas and Varna), as well as minority-owned airports (Hanover, Delhi, St Petersburg and Xi’an) and airports where it has a management contract (Cairo, Riyadh, Jeddah and Dakar).

“Growth in foreign markets helped us weather the traffic and economic storms in the past, but Frankfurt is poised for more growth in the future thanks to our timely capacity expansion,” explained Schulte. “Simultaneously, our strategy is to continue growing our external business beyond Frankfurt. We are constantly on the lookout for opportunities worldwide. We are not a finance investor – like a bank for example – but are interested in more majority stakes so that we can bring the full extent of our expertise into play. Many projects in Brazil, Europe and elsewhere have been tentatively announced to the marketplace, but nothing concrete is out there yet. We will have to wait and see which projects are interesting to us, which models are being offered by various governments, and which ones we could win.”

**360° ENVIRONMENTAL STRATEGY**

Frankfurt Airport is currently at the ‘Reduction’ level of Airport Carbon Accreditation. Indeed, it was the very first airport to become Airport Carbon Accredited, in September 2009 and is currently working diligently on progressing to the next level – ‘Optimisation’. In February, FRA became the fourth airport in Europe to fully implement Airport Collaborative Decision-Making, which will help optimise operations and shorten aircraft taxi times.

The new buildings at FRA feature energy saving and carbon reducing technologies and concepts. For example, its first carbon neutral building is Fire
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Station 4, which has been built next to Runway Northwest. Fraport’s overall goal at FRA is to reduce CO₂ emissions per traffic unit (one passenger or 100kg of freight) by 30% by 2020.

Other initiatives include protecting the biodiversity of plants and animals, and major reforestation to offset trees cut down for the expansion programme. Underlying all of this, Fraport has created a Sustainability Management department to link sustainable principles throughout the airport company and other stakeholder partners at FRA. “We are very active in a wide range of environmental initiatives, but noise is obviously the one area that generates the most concern from our neighbours. The lengthy and extensive approval phase for the Airport Expansion Program has dealt with these issues in detail,” said Schulte. “We are pushing ahead with our active noise abatement programme and stay in close dialogue with concerned neighbours.

The reconfiguring of flight routes, due to the implementation of the new runway later this year, is a growing issue that has been addressed. The success of noise reduction via new engine and aircraft technologies has to be explained even more in the future.”

Fraport also considers SESAR to be vital for Europe. It is directly involved in SESAR as a partner in the SEAC consortium of major European airports. Recently, SEAC won a SESAR innovation award for its Project 6.5.1 (Airport operations plan definition). This project developed a new approach in bridging airport operations with air traffic control, with the goal of developing the link between the Airport Operations Center and the ATM Network.

**ENHANCING THE AIRPORT EXPERIENCE**

Fraport is continuing its successful ‘Great to Have You Here!’ top-quality and customer service initiative, which is focused on improving service and the airport experience at Frankfurt. The focus in the past year has been on shortening waiting times at security checkpoints; more than 90% of passengers now wait less than 10 minutes.

Commenting on the LAGs (liquids, aerosols and gels) issue, Schulte said: “There has been some confusion among the travelling public on this issue, which makes it more difficult for airports and airlines to serve passengers as efficiently and safely as possible. Security will continue to be a challenge in the future, but advances in technology should help. However, the security chain depends on well thought-out and well-implemented procedures and appropriate technologies in tandem with security staff who should provide friendly and effective services.”

After a complex multi-year planning-approval phase, Fraport started implementing its Airport Expansion Program in 2009. The massive capacity expansion and redevelopment of FRA’s existing terminal facilities will strengthen its position in the future. Fraport wants to maintain its role as one of the leading international hubs in global aviation, and to earn a good share of the future growth in aviation. “Now, with our new runway opening later this year and future terminal expansions in 2012 and beyond, we are on the threshold of a new age of growth. Building on our history, we have a very exciting future ahead of us,” concluded Schulte.

**LUFTHANSA: ‘AIRPORTS AND AIRLINES ARE SYSTEM PARTNERS’**

The Lufthansa Airline Group includes five carriers – Lufthansa, Austrian Airlines, bmi, Brussels Airlines and SWISS – operating services via hubs at Brussels, Düsseldorf, Frankfurt, London Heathrow, Munich, Vienna and Zurich. Together they currently serve 283 destinations in 105 countries, and carried 22.1 million passengers in Q1 2011 – up +6.9% year-on-year.

Lufthansa’s strategy for offering a global network and seamless travel is centred on a combination of organic growth, forming alliances and adding airlines to the Group, which were already leaders in their home markets and had additional exposure to emerging markets. “Right now we are focusing on organic growth, which means adding capacity and offering new destinations. But that does not mean that we rule out other ways to grow,” commented Franz.

He believes that, with the recent merger of British Airways and Iberia, the level of airline consolidation activity within Europe has peaked. “Therefore most players will be looking at the airlines in growth markets. But with regulatory frameworks that make it difficult to take a majority position outside Europe, we need the political will to form the basis for further consolidation.”

Franz also said that airports and airlines have to become real system partners, sharing benefits as well as risks in a well-balanced way. “Airlines and airports have acknowledged that they have to work together more closely to achieve the best customer satisfaction. We need more and intensive collaboration to increase flexibility and speed.”

Indeed, Lufthansa and Fraport have collaborated closely on the Pier A-Plus at Frankfurt Airport’s Terminal 1, which will open in summer 2012, ensuring the facility is tailored to market needs.

Service on the ground is increasingly important and, according to Franz, providing these services is becoming more challenging with passenger numbers increasing, while airport capacity is limited. “The passenger’s needs are obvious: short waiting time, simple procedures, getting information fast and being offered solutions in case of irregularities.”

Looking to the future, Franz said: “Our home market is Europe; our growth market is the world. We are always looking into new possibilities to grow and this strategy also applies for long haul routes. There the growth is much more dynamic, especially into traffic regions like Asia-Pacific or Africa and the Middle East.”

Dr Christoph Franz, Lufthansa Group Chairman and CEO: “Airlines and airports have acknowledged that they have to work together more closely to achieve the best customer satisfaction.”

**COMMUNIQUÉ AIRPORT BUSINESS: SUMMER 2011 – P13**
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ICF AIRPORTS’ STRATEGY FOR CONTINUED ANTALYA GROWTH

ICF AIRPORTS, TERMINAL MANAGER AND OPERATOR OF ANTALYA AIRPORT, IS A SUCCESSFUL JOINT VENTURE BETWEEN FRAPORT AND THE TURKISH IBRAHIM ÇEÇEN GROUP. ANTALYA AIRPORT HAS ACHIEVED AN IMPRESSIVE AVERAGE ANNUAL GROWTH RATE OF +14.3% OVER THE LAST DECADE. ALEXANDER LAUKENMANN, GENERAL MANAGER, ANTALYA AIRPORT, OUTLINED THE STRATEGY FOR FUTURE GROWTH IN THIS DYNAMIC MARKET TO ROSS FALCONER.

Antalya Airport handled 22.3 million passengers in 2010 – up +18.8% on the previous year. The number of domestic passengers grew by +19.4% to around 4 million, while international traffic increased by +18.8% to around 19 million. For 2011, year-to-date growth currently stands at +28%, with throughput for the year as a whole forecast to rise to 25 million.

The joint venture was awarded the €2.4 billion concession in 2007 to operate the airport for a period of 17 years. Fraport has been active at Antalya for more than 10 years and as a shareholder in ICF Airports, it seconds management to the airport and offers operational and commercial support where required. ICF Airports also participates in workshops with Fraport and its subsidiaries, at which knowhow and best practice are exchanged.

The promotion of the Antalya region and Turkey as a whole is at the heart of ICF Airports’ strategy, particularly in the key target markets of Germany and Russia, but also in developing markets such as the UK, Scandinavia and the Middle East countries. The operator collaborates with the Association of Mediterranean Tourism (AKTOB) on joint promotions. “One result of this cooperation is that advertisements for Antalya as a destination are on display all over Frankfurt Airport, which hosts nearly 55 million tourists from all over the world every year,” commented Laukenmann. The political changes in the Middle East and North Africa will, in the medium-term, strengthen those countries’ tourism potential, according to Laukenmann. “In the short-term, the situation in the Middle East and North Africa has given ICF Airports the opportunity to promote Antalya, especially in the low season,” he said. “As an ad hoc measure, we approached Russian tour operators to relocate traffic from these destinations to Antalya. The increase in passenger numbers (+19.7%) was, therefore, impressive in February compared with last year.”

That said, there is a definite seasonality to Antalya’s traffic; of the 22.3 million passengers handled in 2010, 85% of those travelled in the summer season – between May and October. ICF Airports is promoting the potential for traffic in the remaining months of the year both nationally and internationally, with Laukenmann highlighting the mild weather, state-of-the-art hospitals for health tourism, excellent golfing and trekking infrastructure, and well-preserved historic sites for those seeking a cultural break.

84% of Antalya’s traffic is international and 16% domestic. The airport mainly handles charter traffic, with the top five airlines being the Turkish carriers Sky Airlines with a 12% market share, Sun Express (10%) and Pegasus (4.7%), and Russian carriers Orenburg Airlines (4.2%) and Transaero (4.1%). Laukenmann explained that none of these are considered real low-cost carriers. Commenting on Antalya’s competitor airports, he said: “Palma de Mallorca can be considered as a competitor in terms of charter traffic in the Mediterranean region.”

ICF Airports provides marketing support when airlines launch new destinations from Antalya. This takes the form of advertising in magazines and on city buses, press conferences, workshops, newsletters and website banners. Additionally, there are discounts on landing and parking fees during specific periods.

With a 630km shoreline on the south coast of Turkey, Antalya is an important tourist destination in the region and ICF Airports is also focused on promoting the potential for traffic outside the summer season.
Open Gate has increased dwell time by 30-45 minutes before boarding the aircraft, created additional spare time for passenger comfort. These modifications, the process time per passenger has significantly decreased and has reduced peak hour flows, particularly during peak hours. “After moving gate security equipment has been relocated in a dedicated area before passport control. This has had the effect of speeding up passenger flows, particularly during peak hours. After these modifications, the process time per passenger has significantly decreased and has created additional spare time for their comfort and shopping before boarding the aircraft. Open Gate has increased dwell time by 30-45 minutes, which directly links with penetration

and per-passenger spend,” said Laukenmann.

The €100 million Domestic Terminal (T3) was officially opened in April 2010. The 36,601sqm facility has an annual capacity of 9 million passengers, making it 74% larger than the building it replaced. It also has four state-of-the-art passenger boarding bridges, which the old facility did not have.

Laukenmann explained: “Though not contractually required, we demolished the old domestic terminal, which was not suitable for Antalya due to its domestic traffic growth. We built a new high quality terminal, which better suits Antalya from an operational and commercial perspective. Since opening, we have received very positive feedback from passengers, the airlines and the authorities.”

**ENVIRONMENTAL STRATEGY**

Antalya Airport has a comprehensive strategy to reduce its environmental impact and in April was accredited at the ‘Reduction’ level of ACI EUROPE’s Airport Carbon Accreditation. The airport’s initiatives include building a state-of-the-art, energy efficient tri-generation power plant, which is gas-fuelled and uses excess heat for heating and cooling purposes. ICF Airports is also responsible for all waste water treatment at the airport. “In order to minimise our ecological impact, we operate a modern waste water treatment factory, as well as a waste separation plant with a high recycling rate,” commented Laukenmann.

The waste water treatment plant prevents pollution of the soil and the sea with discharged waste water; the daily system capacity is 4,500m3 and in 2010 nearly 300,000m3 of waste water was processed. Meanwhile, at the waste separation plant, 21% of total waste was recycled in 2010.

Other initiatives include modernisation of IT equipment with a ‘virtual server’, which is said to have provided a 50% saving in electricity consumption.

Laukenmann said: “We have been awarded ISO certifications in the fields of Quality Management Systems, Environment Management Systems, Customer Satisfaction and Occupational Health Systems, as well as Airport Carbon Accreditation and the Turkish Green Airport Certificate.”

In order to develop public awareness on the environment, ICF Airports has signed an agreement with CEVKO – a non-profit foundation established to spread environmental awareness and increase recycling around Turkey. A green balloon is used as a symbol of the airport’s environmental activities and is designed to improve the awareness of passengers and employees. Indeed, all ICF Airports’ staff and business partners undertake environmental training.

ICF Airports has a clear strategy to capitalise on the dynamic growth of the Turkish aviation market. Its route development strategy couples maintaining existing key markets such as Germany and Russia with developing new markets, such as the UK, Scandinavia and the Middle East countries. With a 630km shoreline on the south coast of Turkey, Antalya is an important tourist destination in the region and ICF Airports is also focused on promoting the potential for traffic outside the summer season. The +28% growth in throughput recorded so far in 2011 suggests the future is bright for Antalya Airport.
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TRANSPORT 2050:
INFRASTRUCTURE DRIVES MOBILITY

THE EUROPEAN COMMISSION RECENTLY PUBLISHED ITS ‘ROADMAP FOR THE FUTURE OF TRANSPORT 2050’ – A COMPREHENSIVE STRATEGY FOR A COMPETITIVE TRANSPORT SYSTEM, WITH THE AMBITIOUS AIM OF CREATING A SINGLE EUROPEAN TRANSPORT AREA. ROSS FALCONER & ROBERT O’MEARA REPORT.

European Commission Vice President responsible for Transport, Siim Kallas launched the much-anticipated White Paper, which was greeted warmly by many, in March. The aim is to create a Single European Transport Area with more competition and a fully integrated transport network that links the different transport modes. Speaking at the launch, he said: “Curbing mobility is not an option. Nor is business as usual. Action cannot be delayed, infrastructure takes many years to plan and build. Trains, planes and ships last for decades. So the choices we make today will determine the shape of transport in 2050. That’s why we are acting now to achieve a transformation of Europe’s current transport systems. We need a fully integrated Single European Transport Area by 2050, at the service of business, enterprise and citizens across the continent.”

The European Commission invited the views of industry stakeholders on the measures that should be considered in preparation of the White Paper. Two High Level Stakeholder conferences took place – the second in November 2009.

ACI EUROPE issued a Position Paper on the Future of Transport, which presented three key messages: Aviation provides a unique and irreplaceable contribution to society – and in particular to the European economy; aviation needs to grow and this growth is compatible with the EU’s ambitious environmental objectives; and aviation needs an industrial policy at EU level focused on the reduction of regulatory-induced costs and new business opportunities. Kallas attended the January meeting of the ACI EUROPE Board, with discussions on the White Paper high on the agenda.

The White Paper outlines a series of ambitious
targets in order to achieve the twin objectives of increasing mobility and reducing emissions. The headline figure is the aim to reduce carbon emissions generated by Europe’s transport system by 60% by 2050. Key goals on the road to achieving this overall target include no more conventionally-fuelled cars in cities; 40% use of sustainable low carbon fuels in aviation and at least a 40% cut in shipping emissions; and a 50% shift of medium distance freight journeys – defined as 300km and beyond – from road to rail and waterborne transport.

Other key targets are that by 2050 the majority of medium-distance passenger transport should go by rail, while by the same year all core network airports should be connected to the rail network, preferably high-speed rail.

**CAPACITY CHALLENGE**

Kallas said: “Transport 2050 is a roadmap for a competitive transport sector that increases mobility and cuts emissions. We can and we must do both. The widely held belief that you need to cut mobility to fight climate change is simply not true. Competitive transport systems are vital for Europe’s ability to compete in the world, for economic growth, job creation and for peoples’ everyday quality of life.”

The White Paper recognises that the lasting success of the European aviation market is dependent on the ability to tackle the capacity challenge and its negative impacts on the economy, passenger experience and delays. Long-term trends indicate capacity constraints on the ground and in the sky. EUROCONTROL figures highlight that despite a 41% increase in airport capacity between 2007 and 2030, 11% of demand will go unaccommodated in the best-case scenario, and 25% in the worst-case.

The White Paper states: “Whilst for certain airports there is a need for additional infrastructure, some congestion problems can be tackled by a system of slot allocation.” It also calls for greater intermodality, with better integration between air and rail. However, such measures alone cannot address congestion.

A key goal is the complete modernisation of Europe’s air traffic control system by 2020, delivering the Single European Sky (SES) and providing shorter and safer journeys, and more capacity. Events such as last year’s volcanic ash crisis emphasise the importance of better-integrated EU airspace.

SES aims to triple capacity, halve ATM costs per flight, improve safety by a factor of 10, and reduce the environmental impact of each flight by 10%. Under the initiative, a Network Manager function will be created to manage resources from a pan-European perspective; Functional Airspace Blocks (FABs) are being established to optimise the provision of air navigation services; while the introduction of a Performance Scheme is aimed at increasing the performance of air navigation services in four key performance areas: safety, environmental targets, cost efficiency and flight efficiency. The White Paper states that: “Delivering the SES within the agreed milestones is of the utmost importance for the future of European aviation.” The SES initiative will replace a national, fragmented approach with a truly European framework, with cooperation between Member States, European institutions, EUROCONTROL and other industry stakeholders.

The aim, by 2020, is also to complete the European Common Aviation Area of 58 countries and 1 billion inhabitants, which would create a truly integrated aviation market covering the EU and its closest regions. It would also provide unified regulatory approaches in areas such as safety and security.

**INDUSTRY REACTION**

The aviation industry reaction to the White Paper was broadly positive, with recognition of the importance of transport to Europe’s economy, job creation and the mobility of its citizens. ACI EUROPE supports the vision outlined in the White Paper, particularly the acknowledgement that infrastructure shapes mobility, and also the challenging targets to reduce total transport carbon emissions by 60% by 2050 and to see the 40% use of sustainable low carbon fuels in aviation.

Indeed, Europe’s airports are already notably proactive in addressing carbon emissions. ACI EUROPE’s successful Airport Carbon Accreditation programme has already certified 43 airports in 18 European countries, welcoming over 600 million passengers a year.

However, ACI EUROPE also cautioned against unrealistic expectations. Olivier Jankovec, Director General, commented: “Improved intermodality will provide better mobility, but it will not solve the airport capacity crunch. Independent forecasts clearly indicate that demand for aviation in Europe will nearly double by 2030. They also warn that the extensive rail developments announced will only absorb 0.5% of the total demand for air transport. Given the ever-increasing difficulties and uncertainties that Europe’s airports face in seeking expansion approvals, the blunt reality of unprecedented congestion will sneak up on us very quickly. Europe’s airports need their licence to grow!”

He added: “Transport 2050’s ambitions for a Single European Transport Area are to be applauded, but I cannot stress enough how urgently we need action on its call for an approach to resolving the airport capacity crunch. Without it, European air transport of all types will be compromised and passengers will suffer significant disruption.”

While the Association of European Airlines (AEA) did not publically react, the European Regions Airline Association (ERA) responded positively. Mike Ambrose, Director General, ERA, said: “It is greatly encouraging that the White Paper states ‘curbing mobility is not an option’. We see the promotion of air transport as a logical consequence. Europe’s air transport system is a driver for Europe’s international competitiveness and the sustainable, increased mobility of its citizens, especially those in Europe’s regions for whom international connectivity is vital.”

While the goals of Transport 2050 are commendable, it is clear that they cannot be achieved without urgent action to address the airport capacity crunch. This is not just an issue for airports; in the context of increased global competition, lack of capacity will result in congestion and disruption with wider implications for both Europe’s mobility and carbon emissions. The European Commission will address the issue of airport slots in its forthcoming ‘airports package’ due in the autumn. Indeed, they put out a press release as Airport Business was going to press, stating that better use of airport slots could allow the European airport network to accommodate an additional 28 million passengers. As promising as this may sound to some, it only amounts to a small gain, through better use of a scarce resource. The issue of airport slots does not hold all the answers to the airport capacity crunch. The cold reality reinforced by Transport 2050 is that, more than ever, airports require their licence to grow.
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“This is of course the premier event for airports in the world”
Richard Gooding, Chief Executive, London City Airport, UK

“This is a great event, a lot of big players in the industry are here... it is a great place to socialise with people and to share experiences”
Julian Jaeger, Chief Executive Officer, Malta International Airport, Malta

“The conference is really important because ideas come from everywhere”
Majidah Hashim, Senior Executive, Malaysia Airports, Malaysia

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MORE AND MORE OF EUROPE’S AIRPORTS ARE PUTTING SOCIAL MEDIA AT THE HEART OF THEIR COMMUNICATIONS STRATEGIES AS THEY RESPOND TO NEW COMPETITIVE REALITIES, BUT THE MANNER IN WHICH SOCIAL MEDIA IS EMPLOYED DIFFERS FROM AIRPORT TO AIRPORT. DONAGH CAGNEY LOOKS AT A NEWLY-PUBLISHED ACI EUROPE REPORT WHICH EXPLORES THIS EMERGING TREND.

In truth, the paths of both airports and social media have been converging for some time. As social media continues to propagate, it is playing an increasingly pivotal role in the lives of both individuals and groups across the globe, and redefining the relationships people have with each other, with businesses and with other organisations. The corporate and commercial opportunities emerging from this shift are only beginning to become clear.

Meanwhile, airports have been grappling with new competitive challenges. The business transformation outlined in ACI EUROPE’s ‘Policy Outlook’ published last year, has shown how airports are actively competing with each other to attract and retain new customers. Alongside price, airports recognise that innovation is the key to commercial success, and that the opportunities which new technologies present have to be explored and leveraged wherever possible.

Naturally, as air passengers are engaging in social media, it makes sense for airports to adopt this channel to reach out to their customers. And as with all industry innovations, competitive pressures have ensured that social media is increasingly becoming a necessity as much as an opportunity for European airports. 64% of passengers travelling through ACI EUROPE member airports last year now have the option of connecting with their airport via social media channels.

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The Report

Picking up on this trend, ACI EUROPE has compiled a report on airports’ use of social media, entitled ‘Airports 2.0: How European Airports are Embracing Social Media’. Published in May this year, the report examines, from a number of angles, the relationship between airports and
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Catherine CARAUBLI: carabl@bordeaux.aeroport.fr
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social media which has emerged in recent times. The focus of the report is on Facebook and Twitter, as these are the two predominant social media channels, common across most airports. A 3-month survey of those airports’ Facebook and Twitter feeds was undertaken, to gather both information and insight. This was backed up with interviews with a number of communications professionals engaged in social media, across a sample of member airports.

With the information gathered, the report was divided into two, which looked at the issue from two different angles. The first section involves some number crunching, to determine who is doing what. The second section takes a more interpretive approach and tries to understand why these airports are engaging in social media, as well as how they are trying to achieve those objectives.

The report is not prescriptive, and instead simply reflects what airports are currently doing.

THE NUMBERS

The report shows that, of ACI EUROPE’s member airports, 40% of airports operate at least one social media feed. In passenger terms, 64% of passengers travelling through ACI EUROPE member airports can access a social media feed of their departure or arrival airport. This higher number reflects the fact that while regional airports are well represented, many major hubs, and some airport groups, have undertaken to provide their large passenger bases with these social media services. The report also produces the perhaps slightly counter-intuitive result that although Twitter is more popular with users, Facebook is preferred by airports. So despite airport Twitter feeds having almost 1.75 times the number of followers than their Facebook equivalents, airports still preferred Facebook, with 82% of the airports in the survey having a Facebook profile, compared to just 70% having a Twitter account.

Size naturally played a role in the popularity of social media feeds, with hub airports with more than 25 million passengers per year having an average number of users almost 5 times that of smaller airports with less than 5 million passengers per year. However, on a per passenger basis, the smaller regional airports outperform their hub equivalents, showing that social media services are certainly not the natural preserve of larger airports.

Similarly, geography seems to have an impact on an airport’s social media popularity, although its effects proved difficult to pin down. The uniform success of Irish and UK airports with Twitter suggest that language at least had a strong role to play. The picture is less clear with Facebook. If there is a country-specific effect on an airport’s social media popularity, it is weak, and overridden by other factors.

THE DIFFERENT USES OF SOCIAL MEDIA

As for how airports are using social media, five main uses emerged from the survey. Airports generally employ a combination of approaches across their social media feeds, and no one approach emerged as the most dominant.

Airports use social media as a customer service tool, assisting their passengers while simultaneously publically demonstrating their commitment to their customers. They used Facebook and Twitter to connect informally with their passengers, leveraging the opportunity to build a relationship which would not have existed in the absence of social media. Airports are also turning to social media for crisis management, particularly during last winter’s weather disruption, and the volcanic ash episodes of both 2010 and 2011 alongside the social media activities of EUROCONTROL. Traditional corporate communications are also being channelled via social media, allowing existing messages to be communicated to new audiences. And airports are also using social media commercially, attempting to marry digital communications with their need to drive non-aeronautical revenues.

The report also delves into some of the issues raised in discussions with airport professional communicators, such as the resources required, the risks entailed, and the future uses of social media.

The report is available online, either at ACI EUROPE’s Linked In group ‘Airports Council International European region (ACI EUROPE)’ or in the Members’ Room of the ACI EUROPE website: www.aci-europe.org.
As previously reported in Airport Business, 29 April 2011 had been scheduled as the deadline for the initial easing of the LAGs restrictions. This first step meant to allow the carriage of LAGs bought at non-European countries by passengers transferring via/departing at European airports within 36 hours of purchase. Security experts at European airports considered that available LAG screening technology remains underdeveloped and untested operationally. Moreover, facilitation experts also cautioned about the processes involved, as passengers would have had to remove all LAGs from their packaging for screening and could still see sealed LAGs opened and confiscated in case of secondary screening.

For months ACI EUROPE had been voicing its concerns to Europe’s decision makers with increased urgency. European Commission Vice President responsible for Transport Siim Kallas, (who inherited this ambitious plan to lift the LAGs ban from his predecessor Antonio Tajani) had given every indication that he had no intention of reconsidering the Phase 1 deadline, despite both a direct and public appeal from the board of ACI EUROPE, as well as private and public statements of concern from a number of Member States. Subsequently, Brian Simpson, MEP and Chair of the European Parliament’s Transport & Tourism Committee, came out against a postponement of the deadline, after a meeting with Vice President Kallas.

Worryingly, the EU’s main trading partner – the US – had not in the end committed to cooperating with the initiative – meaning that European airports would still have had to confiscate LAGs bought at non-European airports from passengers bound for the US. Moreover, as the deadline came closer, several key Member States had indicated that they would not enforce the new restrictions. This raised the prospect of the regulation not being fully enforced across Europe.

All this meant that the potential for both passenger disruption and security gaps remained very real. Finally, on the eve of the deadline, the European Commission took the unusual step of deferring the easing of the restrictions, as it was eager to “avoid a situation which would not have facilitated travel but rather caused confusion for passengers”.

As European airports – particularly transfer hubs – breathed a sigh of relief, the European Commission undertook to consult with both Member States and EU trading partners on the way forward.

In a subsequent exchange of views between the European Commission and the European Parliament’s Transport & Tourism Committee on 24 May, some indications were given as to the next steps with regard to LAGs.

In presenting to the committee, Matthias Ruete, Director General of DG MOVE, European Commission described the elements which made the EC recommend Member States to postpone the introduction of the intermediate phase in the removal of the LAGs ban. The fact that a large number of EU Member States had announced they would not implement the rule had played a part, but in relation to the US request for consultation, the discussions with American negotiators showed that an agreement was not possible (further complicated by the death of Osama Bin Laden). It became clear that the US wanted to impose additional requirements (in particular as regards screening rates), which would have been extremely difficult to meet from an operational point of view.

Following these new US requirements, only 2-3 Member States informed they would still be in a position to apply the new regime. As
a result of these, 24 Member States would
probably use a “let out clause”. This clause
would have allowed them to maintain existing
LAGs restrictions and forgo the application of
the new regime on the basis of “more stringent
national measures”.

Mr Ruete commented that the challenge now
is to be better prepared for the big target: the full
removal of the LAGs ban in April 2013.

So, where does that leave Member States that
were actually ready and prepared for the April
2011 deadline? Well, the obligation to partially
remove the ban from April 2011 has been
transformed into a right to do so, but the new
deadline is now clear. The overall removal of the
ban should still take place in April 2013 and this
is where the EU institutions are now pouring all
their energy, on this issue. However, the European
Commission also proposed to set up a Working
Group that would re-define the roadmap for 2013
and decide in 2012 if this date is still realistic.

This follows a suggestion from ACI EUROPE,
which was made as the situation evolved in the
weeks preceding the Commission’s decision to
reconsider the April 2011 deadline.

While Europe’s airports fully support the
objective of removing existing LAGs restrictions,
it is clear that to do so across the board as
contemplated in 2013, the screening technology
needs to further evolve.

The much sought after requirement for
the industry will be the ability to screen LAGs
within traveller’s cabin bags and not separately.
This is considered essential by security and
facilitation experts, given that more than 700
million departing passengers will need to be
screened. The technology will also need to be
thoroughly tested operationally, and not just in
laboratories.

GRIMSVÖTN ERUPTION SHOWS
LESSONS LEARNED

JUST OVER ONE YEAR ON FROM THE EYJAFJALLAJÖKULL ERUPTION IN APRIL 2010, A SECOND ICELANDIC VOLCANIC
SHOCK OCCURRED ON 21 MAY WITH THE ERUPTION OF THE GRIMSVÖTN VOLCANO. A SWIFT RESPONSE, INCLUDING
ACTIVATION OF THE EUROPEAN AVIATION CRISIS COORDINATION CELL (EACCC) BY THE EUROPEAN COMMISSION AND
EUROCONTROL, ENSURED THAT THE IMPACT WAS SIGNIFICANTLY LESS THAN THE EYJAFJALLAJÖKULL ERUPTION.

ROSS FALCONER & ROBERT O’MEARA REPORT.

The Grimsvötn eruption sent an ash plume
as high as 17km, with strong winds
dispersing the ash cloud towards the
European continent. In the hours immediately
following the eruption, the European Commission
and EUROCONTROL activated the European Aviation
Crisis Coordination Cell (EACCC), which includes senior representatives from the European
Commission, EUROCONTROL, the European Aviation Safety Agency (EASA), Member States,
the aviation industry (including ACI EUROPE) and
unions. The EACCC was established in May 2010
and provides an efficient structure for effective
coordination of a crisis in real-time.

Since April 2010, the European Commission,
EUROCONTROL and EASA have worked
intensively to devise an alternative procedure
for flight operations, safeguarding the highest
possible level of safety, while minimising
disruption. This procedure was put at the
disposal of national governments, but there
were concerns that Members States still
would not apply the procedure promptly and
consistently throughout Europe.

Over the three days from 23-25 May, flights
were disrupted at airports in Iceland, the UK,
Ireland, Norway, Denmark and Northern Germany,
with some concerns about a possible dispersion
further South, potentially impacting airports in
France and Spain.

As well as participating in the EACCC, Europe’s
airports and airlines, represented by ACI EUROPE
and the Association of European Airlines (AEA)
met with senior European Commission officials
on 24 May to review progress in the handling of
the Grimsvötn eruption and subsequently issued
a joint statement speaking out clearly in support
of the procedure that had been made available to
Member States.

Ryanair was typically outspoken on the
issue, claiming to have operated what it called
a ‘verification flight’ over Scotland without
encountering any ash. However, the UK Civil
Aviation Authority dismissed the claim, asserting
that the aircraft had been tracked on radar and
had not flown near the high concentration of ash.

APRIL 2011: EUROCONTROL EXERCISE

By coincidence, in April, one year on from last
year’s volcanic ash shock, EUROCONTROL led a
special volcanic ash crisis exercise, which involved
more than 70 airlines, 14 air navigation service
providers, 10 national regulatory authorities, the
Volcanic Ash Advisory Centre London (VAAC), as
well as the European Commission, EASA and
EUROCONTROL.

The aim was to validate changes and
improvements to the volcanic ash contingency
plan and procedures. Ironically, the exercise
actually simulated the eruption of the Grimsvötn
volcano and the resultant spread of a volcanic
ash cloud across the North Atlantic and across
European airspace.

While fully respecting safety requirements,
airspace closures were minimised during the
Grimsvötn eruption. In total, only 900 out of
90,000 European flights were cancelled in the
three-day period from 23-25 May; this was far
less than the disruption last year following the
Eyjafjallajökull eruption, when airspace was closed
for six days across much of Western Europe and
100,000 flights were cancelled. The second time
around, the swift response highlights that Europe
is now equipped to respond to an ash cloud crisis
with a graduated rather than a one-size-fits-all
approach and that the measures put in place for
crisis situations have given Europe an aviation
system that is better prepared and faster to react.
Despite everything thrown at the aviation industry over the past year, Bristol Airport has bucked the trend and seen a rise in passenger numbers. And even more impressive, this is set to continue with numbers soaring to 10 million passengers per annum within the next decade.

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THE 20TH ACI EUROPE AIRPORT TRADING CONFERENCE AND EXHIBITION, THIS YEAR HOSTED BY DAA, TOOK PLACE IN DUBLIN FROM 4 TO 6 APRIL. IT WAS AN APPROPRIATE VENUE – IRELAND IS, OF COURSE, WHERE DUTY FREE BEGAN, AT SHANNON AIRPORT IN 1947, AND DUBLIN AIRPORT ITSELF RECENTLY OPENED ITS SPECTACULAR NEW TERMINAL 2, WHICH IS NOTABLE FOR ITS IMPRESSIVE RETAIL OFFER. ROSS FALCONER REPORTS.

The travel retail industry has come a long way since 1947, growing to global revenues of US$39 billion (€27bn) last year – up +13% on 2009, and indeed a record that exceeds the 2008 pre-recession total. The impressive attendance of more than 350 delegates highlights the importance of commercial revenues to the business models of airports of all sizes.

The event addressed a broad range of topics, such as technology advancement to drive revenues, and evaluating the different commercial models for airports, concessionaires and brands. Regulatory issues were also high on the agenda; while the opportunities for the travel retail industry are many, so are the challenges, such as the single bag carry-on rule and the threat to duty free tobacco sales.

Declan Collier, CEO, Dublin Airport Authority, and Filip Soete, Marketing and Operational Communications Director, Aéroport Nice Côte d’Azur and Chairman, ACI EUROPE Commercial Forum, delivered the welcome addresses. “Retail is in our DNA; duty free was invented at Shannon Airport in 1947,” said Collier, adding that Dublin’s new Terminal 2 sets “a new standard for travel retail”.

Dublin Airport is an important national asset for the Irish economy, handling 75% of all air traffic into the Irish Republic. Ireland is also one of the world’s most open economies, exporting 82% of its annual GDP. The major capital investment programme to transform Dublin Airport saw €1.2 billion invested between 2006 and 2010, and Collier explained that a planning application for a new parallel runway will be lodged in 2011 to provide additional capacity and direct long-haul connectivity.

Soete cited some interesting ACI EUROPE statistics – for example, up to 60% of airport revenues come from non-aeronautical activity, and the estimated non-aeronautical revenues of European airports total €12 billion annually. “Today, non-aeronautical revenues are strategically important for airports,” commented Soete. “We must drive innovation and have the ‘wow’ factor; Dublin’s Terminal 2 has this.”

ACI EUROPE Director General Olivier Jankovec delivered a detailed State of the Industry address, looking at areas such as recovery from the economic crisis; changing market structure – with the growing market share of the low-cost carriers to reach +50% in 2013, and airline consolidation; changing traffic patterns; and the four key challenges of security, connectivity, capacity, and the environment.

Jankovec referred to the capacity crunch, with demand for air travel set to double in Europe by 2030. While there will be a 41% capacity increase, 11% of demand will be unaccommodated, leading to unprecedented congestion. Jankovec reiterated, while on challenges such as the threat to duty free tobacco sales and the one bag rule, ACI EUROPE’s full cooperation with the European Travel Retail Council (ETRC) was assured.

Richard Reed, co-founder of Innocent, the British fruit drink and ‘smoothie’ maker, gave a truly inspirational keynote address, with a perspective from outside the industry. Reed presented five key lessons: 1. Having a mission helps – “The most successful companies are clear on why they are...”
Intergovernmental negotiating Body is examining in certain key areas. O’Connell explained that an lesson for other governments across Europe. activity, describing this as a brave approach and a prejudicing passenger rights and airport commercial purchased within airport retail, in order to avoid legislation that allows passengers to carry on items can be bulky. O’Connell emphasised the need to categories, such as liquor, in which the items is particularly challenging for certain product purchases, will not make purchases.”

Where fully enforced, the one bag rule has resulted in a drop of up to -40% in sales. It is particularly challenging for certain product categories, such as liquor, in which the items can be bulky. O’Connell emphasised the need to defend passenger rights. He commented Spanish legislation that allows passengers to carry on items purchased within airport retail, in order to avoid prejudicing passenger rights and airport commercial activity, describing this as a brave approach and a lesson for other governments across Europe.

The World Health Organization Framework Convention on Tobacco Control is being reviewed in certain key areas. O’Connell explained that an Intergovernmental Negotiating Body is examining the area of illicit trade, while a Working Group has been established to examine Taxation Policies. “Pressure is applied by NGOs and certain States to ban duty free sales of tobacco. The current wording of the illicit trade protocol includes a restatement of the right to ban duty free. There is a risk that wording may be altered later in the negotiating process,” said O’Connell.

Frank O’Connell, president, ETRC, provided a comprehensive breakdown of the political challenges facing travel retail. Under the one bag policy adopted by some low-cost carriers, a fine is imposed on passengers for every item they carry beyond a single piece of cabin baggage. “There is no exemption for travel retail purchases and rigorous enforcement at certain airports,” commented O’Connell. “However, enforcement of the policy varies from airport to airport. It poses a threat to duty free and travel retail, as passengers who are uncertain about the ability to carry on purchases, will not make purchases.”

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**CHALLENGES FACING TRAVEL RETAIL**

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**DIFFERENTIATING THE PRODUCT**

The consensus across the conference was that innovation is vital. London Heathrow’s slogan is ‘Making every journey better’, and John Holland-Kaye, commercial director, BAA, outlined how the operator is using Customer Relationship Marketing (CRM) to increase retail spend. “The emphasis is on ‘relationship’,” he said. BAA’s Worldpoints reward scheme has 250,000 members and, according to Holland-Kaye, generates £2 million (£2.3m) per year. “As a reward scheme it works. Worldpoints members spend 7% more per year than non-members,” he said. Other initiatives include Reserve & Collect and the Heathrow iPhone App, which generates instant feedback from passengers.

According to Ezio Balarini, group chief marketing officer, Autogrill: “F&B and retail are critical revenue generators for modern airports because they’re among the most important passenger needs.” He provided details of ‘Contentainment’ – a form of digital retail theatre in which retailers, brands and landlords work in partnership. Balarini also referred to precision targeting, which he said involves identifying “the key destinations by terminal for each brand, ensuring we have the right product, with the right message in the right place at the right time”.

There is no one-size-fits-all model for airport commercial activity. What is important, according to Doug Benham, Head of Commercial, MAp Airports, is focusing on the retail experience.

**UNCONFERENCE**

This year’s event also saw the introduction of the innovative Unconference session, in which the conference room broke out into five working areas, focusing on Fashion Retail, Currency Exchange and VAT Refund, Food & Beverage, Parking and e-Commerce. It was widely heralded as a successful initiative that increased the level of debate and provided an effective forum for open discussion.

The conference highlighted both the opportunities and challenges facing travel retail, as airports seek to maximise revenues. It is clear that creativity and innovation are key to future success, and Europe’s airports, concessionaires and brands have the skills and the imagination to deliver great retail.
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ACI WORLD RELOCATES TO MONTRÉAL

Following the decision by the ACI World Governing Board announced last year, ACI World has marked this year’s 20th anniversary of Airports Council International (ACI) by moving to its new offices in Montréal, to afford the global interests of ACI a stronger presence on ICAO’s home ground.

There was a smooth transition from ACI World’s previous home in Geneva, and an official opening ceremony took place on 3 May attended by guests from across the aviation community, local business leaders and government officials.

The move to Montréal is viewed as an opportunity to forge strong collaborative partnerships at ICAO that will better enable the association to serve its members. Calling for enhanced cooperation between aviation partners, Angela Gittens, Director General, ACI World, said: “Airports are an economic pillar for the communities we serve. Community expectations are our guide in business development, and industry cooperation will be our platform to deliver on those expectations.

We must see ourselves as a whole and well-integrated aviation system serving the consumer, not as separate sectors acting sequentially.”

The new ACI World contact details are:

ACI WORLD
Tel: +1 514 373 1200
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REGIONAL AIRPORTS CONFERENCE & EXHIBITION FOCUSES ON THREATS AND OPPORTUNITIES

REPORT BY DONAGH CAGNEY

ACI EUROPE’s Regional Airports’ Forum 4th Annual Conference and Exhibition took place on 9-11 May just outside Cagliari, Sardinia. Kindly hosted by Cagliari Airport, and co-located with Routes Europe, the event brought together 150 delegates from regional airports, airlines, local and national authorities, the European Commission (EC) and ACI EUROPE World Business Partners, under the theme ‘Enhancing the competitive position of regional airports – key to survival and development’.

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The theme was chosen in light of the difficult position that regional airports currently face – despite the acknowledged essential role they play for both regional and European economic growth, these airports are still obliged to comply with ‘one size fits all’ regulation, which recognises neither the extremely competitive market conditions they operate within, nor the corresponding cost considerations specific to their business models.

This reality informed many of the conference sessions, with airlines, airport associations and the leaders of various regional airports – including Marseille-Provence, Lyon-St Exupéry and Ostend-Bruges airports – all contributing their perspectives on the issue. Regional airport representatives were given the opportunity to address their concerns directly to the EC, with Head of Unit for Airports & Infrastructures Emmanuelle Maire both presenting the EC’s position, but also soliciting feedback from conference delegates.

The theme of the conference was further reinforced by ACI EUROPE’s subsequent press release, which highlighted the starkly differing traffic and financial situations being faced by different regional airports across Europe.

In addition conference delegates partook in a workshop on the application of ACI EUROPE’s Key Performance Indicators (KPI) Programme to regional airports – organised and led by ACI EUROPE Economic Research Analyst Teresa Ziober – and a tailored panel discussion on both operational and cost efficiencies, as well as the development of business opportunities for such airports. The conference was followed by the 13th meeting of the Regional Airports’ Forum, which saw the appointment of new Chair of the Regional Airports’ Forum, Tonci Peovic, Director of Zagreb Airport. The new Vice-Chair is Thomas Langeland, Director of Avinor’s Kristiansand Airport.
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ENHANCING PASSENGER AND CARGO SCREENING

AS PASSENGER SECURITY AND CARGO SCREENING LEVELS HAVE INCREASED, SO HAS THE DEMAND FOR NEW TECHNOLOGIES TO PROVIDE A RELIABLE MEANS OF FURTHER SECURING AIR TRAVEL. RYAN GHEE REPORTS.

Just as the failed Northwest Airlines Flight 253 bomb plot led to calls for new technologies to be adopted in order to enhance passenger screening, the discovery last October of two explosive devices in US-bound cargo shipments originating from Yemen cast a similar spotlight on the reliability of cargo screening.

While the failed Christmas Day bomb plot led to the introduction in some airports of security scanners in early 2010, the cargo incident has led to calls for the introduction of new technologies and stricter, standardised regulations to ensure full security.

The introduction of new technology, however, is often easier said than done, especially when enhancing security is the overriding objective. Highlighting this fact, 18 months on from the somewhat controversial adoption of security scanners by London-Heathrow, Amsterdam Airport Schiphol, Manchester Airport and others, security experts are keen to point out that it is possible to balance enhanced security while maintaining privacy standards.

“We believe that both can be achieved, as no data is stored. The image is viewed in a secure room away from the machine’s location with no chance for the person being scanned and the image to be linked together,” explained Mike Fazackerley, security director, Manchester Airport.

“Extensive safeguards have been developed to ensure the privacy of our customers is respected. There can be no visual or verbal contact between security staff operating the machine in the search area and security staff viewing the images.”

Manchester Airport was one of the first airports to adopt security scanners and they are now in place at every security lane across all three terminals.

Goldsmith: “The technologies exist today to allow a very high standard of screening of air cargo.”
Fazackerley said: “We are always keen to hear from our customers, so we regularly undertake surveys to find out how we can make things easier. Independent surveys found that passengers overwhelmingly preferred the security scan to a full pat-down – 92% found the process better than a hand-search. Since being introduced back in 2009 (on a trial basis), nearly one million people have been through the body scanners, with only 12 refusals.”

**IMPROVING SECURITY AND EFFICIENCY**

Echoing the views of Fazackerley, Andrew Goldsmith, vice president, global marketing, Rapiscan Systems, explained that both privacy and security can be achieved “through a combination of airport procedures and the design of the technology itself”. The company supplies the security scanners that are in place at Manchester Airport and the backscatter technology used in the Secure 1000 provides an example of the important role played by new technology.

“The Secure 1000 bounces very low energy X-rays off of a person to generate an image. While there are other technologies used for security scanning, such as millimetre wave (MMW), we believe that backscatter technology is best suited for aviation security requirements because it provides a uniformly high-resolution image regardless of the material being imaged. This makes it easier for trained operators to rapidly detect potential threats, which improves both security and checkpoint efficiency.”

The fact that there is no facility for the storage, printing or transmission of the security scans undertaken also ensures that there is no invasion of personal privacy, Goldsmith explained. “It is also true to say that the operational standards issued by the DfT (Department for Transport) in the UK make it impossible for the operator viewing the security scans to relate them to any specific passenger.”

**STANDARDISED REGULATIONS**

As the industry now seeks to ensure that everything possible is done to secure cargo screening as far as possible, a number of factors must be considered, which pose different challenges to those faced in passenger and baggage screening. While the reliance on new technologies remains, Goldsmith explained that other factors must be considered.

“The technologies exist today to allow a very high standard of screening of air cargo,” he said, highlighting Rapiscan Systems’ MVXR 5000 as an example. “The major difference is the larger size of the bulk compared to typical hold baggage. This requires screening technology that is not only physically much larger, but also utilises a more powerful X-ray source to identify any potential threat material.”

It is widely accepted, however, that in addition to new technologies, standardised, international regulations on the screening of cargo must also now be introduced. “We believe this will make it easier for technology vendors to invest in the development of solutions that can detect serious threats, such as the October cargo bomb plot,” Goldsmith concluded.
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NEXT-GENERATION GATES PROVE VIABILITY OF SELF-BOARDING

As self-service continues to be explored by airports and airlines as a means of expediting passenger processing and reducing costs, self-boarding has emerged as a viable concept. Ryan Ghee reports.

Lufthansa’s long history of self-boarding dates back to 1997, when it became the first airline to implement self-boarding turnstiles, and six years later the first Quick-Boarding-Gates (QBGs) were introduced at Munich Airport. Since then, they have been introduced at Frankfurt, Düsseldorf and Hamburg, while the former has more recently become the first airport to utilise the second-generation of the self-service facility.

The QBGs work by allowing passengers to self-scan their boarding pass at the gate. After a short verification process, the gate is released and if the passenger’s seat allocation has changed at short notice, a new coupon is automatically printed with the updated information.

“All participants benefit from the operation of self-boarding, since the identification process at the boarding point is so fast,” said Ulf Lengemann, Lufthansa’s Senior Manager Gate Processes. “It’s a win-win situation for all parties involved.”

Following positive feedback on the implementation of the latest QBGs in Frankfurt, the airline is now exploring further installations. Lengemann said: “We plan to introduce the new QBGs in Düsseldorf and we hope to get more airports to invest in QBGs and offer them to the airlines to use.” This, he said, would have to be a “club decision”, which is undertaken for the mutual benefit of everyone involved.

GLOBAL APPEAL

The concept of self-boarding is not unique to Lufthansa. In July last year, Continental Airlines launched a self-boarding trial at Houston Airport – the first of its kind in the US – while South Korea’s Incheon International Airport has also offered self-boarding as part of its wide-reaching ‘u-Airport’ self-service concept since 2008.

The latest version of Incheon International Airport Corporation’s (IIAC) product utilises e-Passports and facial recognition biometric technology, removing the need for a boarding pass altogether and reducing the passenger boarding process to just 13 seconds.

While Lufthansa plans to add to the 15 next-generation QBGs that are already in use, Lengemann explained that he expects self-boarding to become a more common phenomenon in the near-term on a wider scale.

“We expect self-boarding to become an industry standard, and will be integrated in the airport infrastructure of most airports – at least the major airports,” he concluded.

MATERNA’S INTEGRATED PASSENGER SERVICES

“Simplifying the passengers’ journey is our main objective,” said Reinhard Augustin, international sales manager at MATERNA in Germany. “We see great potential at international airports for more efficiency. With our products we focus on cost reduction, reliability, service and security optimisation.”

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Following this motivation, MATERNA launched its Integrated Passenger Services for check-in, baggage drop off, security and boarding.

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As a leading supplier of CUSS solutions, MATERNA has expanded its portfolio with a self-boarding gate, which optimises the aircraft boarding process significantly. It allows fully automated boarding including all necessary validation and reporting to airline DCS.

Augustin added: “Besides our own certified employees, we have a strong partner network in Europe and EMEA, which helps us to fulfil customer requirements quickly and reliably.”
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Sardinia has become a popular destination worldwide for its warm Mediterranean climate all year round, its stunning white sandy beaches, unique cuisine and wonderful hospitality. It is a destination people really dream about visiting. “If you wish to travel to Sardinia there is no doubt that Cagliari Airport is the best entrance to this beautiful island,” said Mareddu. “As for airlines, they will be pleased to know that, although we have a brand new terminal building, we actually are one of the cheapest airports in Italy. Airlines can also be confident they will have outgoing traffic, as 60% of the island’s population live in Cagliari Airport’s catchment area.”

Expansion of the airport’s network through low-cost carriers has led it to develop a wide range of routes throughout Europe. That said, there are still a number of major cities and geographic markets that are underserved from Cagliari. “For example, Amsterdam, Copenhagen, Oslo and Stockholm,” explained Mareddu. “There is also potential to develop services to destinations currently underserved from Germany, including Hamburg, Hannover and Berlin. There is potential to develop services to countries such as Scandinavia, Poland, Romania and North Africa. Finally, frequencies to destinations that can be further increased include the south and north of France, as well as the UK.”

The airport company, Sogaer, invests in new routes which, based on a business plan and economic valuations, prove to be convenient for the development of its airport business. “Carriers interested in making a business proposal for the start-up of new services can contact us anytime,” commented Mareddu.

Non-aeronautical revenues are key to the financial success of airports. Cagliari Airport has seen consistent growth in its non-aviation revenues and the aim is that, by 2015, they will account for 40% of total revenues. “A strategic planning of the terminal’s commercial area is crucial to ensure that we maximise our non-aeronautical revenues. Our commercial strategy is aimed at getting the most out of the available retail space, so we can continue to develop and improve our infrastructure in order meet the evolving demand of airlines and passengers, and therefore improve customer service,” said Mareddu.

Commenting on the main issues currently affecting regional airports, Mareddu said: “Over the last 10 years, traffic at European regional airports has increased by over 50% and in 2010, they handled over 680 million passengers. The introduction of low fare airlines has been the most important reason for such growth. The increasing numbers of passengers travelling from and to regional airports is not only a benefit for the airports and the airlines, but mainly for the economic development of the regions. However, regional airports are profoundly exposed to airlines changing their network in search of the best marketplace. The competitive pressures on regional airports keep increasing and yet, regulations in Europe remain largely inadequate for regional airports. That is why regional airports really require the support of the European Union and not overregulation, especially in relation to the community guidelines on start-up aid to airlines departing from regional airports.”

CAGLIARI’S STRONG INTERNATIONAL GROWTH

CAGLIARI AIRPORT HAS SEEN STRONG PASSENGER GROWTH IN THE LAST FEW YEARS, PRIMARILY DUE TO THE INCREASE IN INTERNATIONAL ROUTES. THESE INCREASES ARE THE RESULT OF A NUMBER OF NEW AIRLINES AT THE AIRPORT, PARTICULARLY LOW-COST CARRIERS, HAVING A SIGNIFICANT EFFECT ON PASSENGER GROWTH, ESPECIALLY ON INTERNATIONAL ROUTES, AS VINCENTO MAREDDU, CHAIRMAN, CAGLIARI AIRPORT, EXPLAINED.

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Construction work on the terminal extension – which has been branded T2 – started in April and it is expected to continue until the spring of 2017, at which point the airport’s capacity and facilities will be significantly enhanced.

At present, the existing terminal covers an area of 148,000sqm, but upon completion of the project this will rise by a further 117,000sqm, taking the capacity of the integrated facility to 28 million annual passengers. “The airport was built for 17 million passengers and this year we expect 20.5 to 21 million passengers,” Nilsen explained. “The addition of the new terminal with the new space will be very positive for the airport and our passengers. Our prognosis is based on an average increase in passengers of 3.5% per year, but this year we think it will be higher than that. We expect by 2016 that Oslo Airport will handle 23 million, maybe even 24 million passengers.”

Every element of the project is designed to enhance the ability to process passengers quickly, in order to minimise waiting times and increase passenger comfort in the terminal building.

34 new check-in counters will be added to the existing 64, while 12 new security stations will contribute to the central security search area, which is located in such a way that it will minimise walking times to each of the gates. A number of self-service options will also be offered, while passengers will also be presented with an additional 12,000sqm of retail space beyond security.

The new Pier North will boast aircraft gates for both domestic and international flights, extending north of the existing arrival and departure areas.

SUSTAINABLE DEVELOPMENT

While the primary concern of Oslo Airport is to expand the capacity and provide high-class facilities to its passengers, ensuring that this is achieved in an environmentally efficient manner is also a key requirement.

“The new terminal will be 50% more efficient than the existing terminal,” Nilsen said. “We’ll use a number of innovative techniques. For instance, we get a lot of snow in the winter, so this will be cleared into piles and in the summer months when it has melted, the water will be used to cool the terminal.”

Furthermore, the public transport network will also be subject to investment to ensure that the number of passengers using public transport – the Airport Express Train in particular – to access the airport remains high. The current railway station will also be located centrally between the existing and new facilities to ensure passenger convenience, and the surrounding road network will be improved and simplified to allow easier access for the additional passengers using Norway’s main airport.

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The most important objectives of de-icing and anti-icing operations are:

• To clear airport runways of snow and ice, and to prevent the bonding of ice on runways, taxiways and aprons;
• To improve safety and traffic flows at airports; and
• To help transport equipment and emergency vehicles to run more smoothly.

Clearway de-icing chemicals are effective, biodegradable and environmentally friendly, and safe and easy to use.

Clearway airport de-icers are classified WGK1, both for their excellent biodegradability and because of their low aquatic toxicity, meaning that they are not generally water endangering.

DE-ICING TECHNOLOGY

PROVIRON HAS ESTABLISHED itself as a reliable supplier of environmentally friendly formate- and acetate-based runway deicers. All of its SMI approved products are considered safe for the environment, whilst having an outstanding efficiency for anti- and de-icing of run- and taxiways. Proviron is constantly working on optimisations for the products, and is now proud to present its latest development: Provfrost HF ECO, a 100% azole free, potassium formate de-icer.

FINAVIA’S WINTER STRATEGY

A TYPICAL WINTER in Helsinki can see snow up to half a metre deep and temperatures of -10°C. However, in Finland, the airports stay open in spite of extreme snowfall and sub-zero temperatures. So, how is this achieved?

Planning, preparation and technical competence are all essential components of Finavia’s strategy. The maintenance units, on call 24-hours a day, and special machinery developed for reducing the slippery conditions of runways are the key.

Safety is the first priority; that is why winter maintenance and anti-ice and de-icing treatments of runways are so important. A ‘Snow-Desk’ – a central communications hub – ensures that information is shared.

If your organisation needs assistance preparing a winter strategy, Finavia can offer the experience and expertise.
“Winter planning and resilience” is not a phrase one would expect to be banded around in the height of summer, but forward thinking operators in the airline industry are already developing robust ‘snow plans’ for the winter of 2011. With new regulations regarding resilience planning being introduced in key markets such as the UK, via the Civil Aviation Authority, the aviation industry will be looking for partners with expertise and a proven track record in coping with freezing winter conditions.

As a global leader in aircraft de-icing fluids, Kilfrost has extensive experience of helping companies develop robust contingency plans to deal with extreme weather conditions. It is not simply a question of ordering sufficient volumes of stock, it is vital that a sophisticated distribution and logistics infrastructure is in place to ensure stocks of aircraft de-icing fluids are readily accessible when need arises.

Problems associated with ice and snow can escalate rapidly, creating a domino effect of airline delays and airport closures across international territories. Recognising these risks, Kilfrost is already working with customers to ensure sufficient volumes of aircraft de-icing fluid will be accessible throughout the winter season wherever required.

It is extremely difficult to accurately predict weather conditions on a long-term basis, so it is therefore vital that providers of aircraft de-icing fluids have scalable operations if they are to effectively support the aviation industry. Kilfrost ensures it has sufficient international manufacturing capacity to expand production to meet demand from customers. This provides valuable peace of mind for customers, enabling them to focus purely on the logistics of physically de-icing planes.

Kilfrost recognises that airports and airlines have limited storage capacity on site for large volumes of de/anti-icing products. This is why the company has invested significantly in developing an independent distribution and storage network, which ensures that planes can be de-iced rapidly and routes remain open even if freezing weather strikes unexpectedly.
**BUDAPEST OPENS SKY COURT EXTENSION**

BUDAPEST AIRPORT HAS INAUGURATED ITS NEW SKY COURT – A CENTRALLY LOCATED BUILDING LINKING THE EXISTING TERMINALS 2A AND 2B. SKY COURT INCREASES THE CAPACITY OF THE AIRPORT’S TERMINAL 2 FROM 5 MILLION PASSENGERS PER YEAR TO 8.5 MILLION. FURTHER DEVELOPMENTS ARE PROPOSED, WHICH WILL ULTIMATELY ENABLE THE AIRPORT TO HANDLE 20 MILLION PASSENGERS PER YEAR, AS JOST LAMMERS, CEO, BUDAPEST AIRPORT, EXPLAINED TO ROSS FALCONER.

Budapest Airport is a public-private partnership between the Hungarian State, which holds 25%, with HOCHTIEF Airport owning the remaining 75%. The airport has two terminals; Terminal 1 is dedicated to low-cost carriers, with Terminal 2 used by the full-service carriers. It is also the base for national carrier Malév. Throughput reached 8.2 million in 2010 – up +1.2% year-on-year, and figures for Q1 2011 are positive with +8% growth year-on-year.

The full-service sector showed the strongest performance, with an increase of almost +20% in Q1. The low-cost segment was up by more than +6% and cargo traffic by around +5%. That success looks set to continue, with a record number of slots requested for the summer season.

New routes already launched this year include Qatar Airways to Doha, American Airlines to New York, Jet2.com to Edinburgh, and airBaltic to Riga.

Malév currently has a 43.3% market share at Budapest and over the course of 2011 will increase its seat capacity on routes from the airport by +30.2%. The low-cost carriers operating at Budapest – Wizz Air, easyJet, Germanwings, Jet2.com and Norwegian – account for a total market share of 22.2%; Wizz Air is the dominant LCC, with a 12.7% share of traffic.

**‘LEAP IN QUALITY’**

SkyCourt is the key element of the BUD Future project, the aim of which is to develop Budapest Airport into the leading aviation hub in Central-Eastern Europe. The airport is investing €261 million in its development programme to end-2011 to achieve this aim, with the SkyCourt project accounting for €102 million of that investment.
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Traffic at Terminal 2 increases significantly during the summer season – to more than 30,000 passengers per day. The 12 new security lanes in the SkyCourt streamline the security process and enable a higher throughput, meaning a faster, more comfortable passage into the transit area for passengers. SkyCourt increases the airport’s capacity to 15 million passengers per year.

However, SkyCourt was not constructed solely to expand capacity, but also to enable a higher quality of service for passengers.

“The elegant, high-quality SkyCourt provides an unforgettable architectural and travel experience, as well as a rich selection of shops and restaurants. The new terminal makes travelling through the airport simpler and more convenient, as well as expanding throughput,” explained Lammers.

Passengers on Malév flight MA 612 to London-Gatwick on 27 March were the first to enter the new central hall. “It was one of the duty managers who best summed up the experiences of the first few days when he said: ‘...everything is working as if the SkyCourt had been operating for years.”

Passengers have been moving through the terminal with ease and self-confidence, which is a tribute to the coordinated work of the terminal’s designers and the team of engineers and facility management specialists who determined the layout of the inner spaces and supervised preparations for the opening,” commented Lammers. “Generally speaking, Budapest Airport has received positive feedback from a wide range of stakeholders and partners about SkyCourt. Virtually no negative feedback has been received so far. The quality of the building is confirmed by the fact that it received the prestigious Tierney Clark award for architectural excellence, even before it was opened. With the leasing of the commercial outlets in the SkyCourt, Budapest Airport effectively doubled the size of its commercial areas, thereby moving closer to the business model common for European airports in the 21st century of increased reliance on non-aeronautical revenues.”

BUD FUTURE PROGRAMME
The expanded commercial area has a wide range of retail outlets, including several international brands, and improved F&B. The 4,300sqm area features 39 new retail and F&B outlets, including a 1,400sqm walkthrough duty free store operated by Heinemann.

Lammers said: “We have had a proven, reliable partner here at the airport in Heinemann Duty Free for more than a decade. With the opening of SkyCourt, I am sure we will offer a premium category travel experience to passengers and shopping is an integral part of this. Heinemann’s offer will meet the taste of the most demanding passenger, whether it be cosmetics, liquor and wine, toys, Hungarian or international brands. Together we serve one common goal: to make air travel a truly joyful event for everybody.”

Meanwhile, the building’s basement houses a state-of-the-art, computer-controlled, automatic baggage sorting system, which includes five baggage belts.

While SkyCourt is undoubtedly the central element of the BUD Future development programme, it is by no means the only element. Indeed, the development of Terminal 2 does not stop with the handover of SkyCourt. The airport has begun the complete internal refurbishment of Terminals 2A and 2B in phases, which are expected to be complete this autumn. The Cargo City development near Terminal 2 also began this year, with 26,000sqm of cargo storage areas and a logistics park to be built in the first phase.

"Also in 2011, Budapest Airport commenced the planning and construction of a new engine test stand near the Lufthansa Technik hangar," explained Lammers. “Less spectacular, but equally important elements of the BUD Future programme were the construction of apron northwest and the refurbishment of the Terminal 2 kerbside, both of which have already been completed.”

These developments, alongside expansion of the route network, make 2011 a historic year for the airport as it continues its strategy to become the leading aviation hub in Central-Eastern Europe.
King Abdulaziz International Airport, Master Plan - Saudi Arabia, Jeddah

Designed by ADPI, the passenger terminal meets LEED certification performance requirements (silver level).

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Faced with increasing energy costs, pressure from local residents, global warming and substantial incentives from local authorities, airports and airlines alike have a leading role to play in bringing about changes to working practices and mentalities.

“The majority of airports have plenty of room for improvement when it comes to saving energy or implementing renewable energy projects,” said Etienne Rouverand, head of sustainable design, ADPI.

ACI EUROPE’s Airport Carbon Accreditation has been developed as the carbon standard for airports; its purpose is to assess and recognise the efforts of airports to manage and reduce their carbon emissions with four levels of award: Mapping, Reduction, Optimisation and Neutrality.

Rouverand: “Airport design is at the heart of our work, which is what enables us to provide airports with the best possible advice and assistance.”

BUILDING NEW SOLUTIONS

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With long-term expertise in the airports and airlines business Lindner focuses mainly in the interior fit-out of comfortable passenger terminals, exclusive lounges and fashionable shop areas.

Several demanding projects have been successfully carried out and are among numerous references worldwide. The company’s key-account team for the airports and airlines sector takes account of all specific requirements and has vast experience to handle demanding site conditions. The new head of the department, Martin Schmidhuber, and his team offer all necessary and individual services for a smooth running project with Lindner’s sustainable and environmentally friendly products.
German company gmp Architekten provides an example of a company dedicated to ensuring that airports are developed in an environmentally sustainable manner. The company has played a major role in a number of significant airport developments, including recent developments at Frankfurt, Hamburg and Stuttgart, while it has also played a major role in the design of Berlin Brandenburg International (BBI) Airport.

Referring to the role that environmental sustainability has played in the design process, Hajo Paap, partner at gmp Architekten, explained: “The holistic view of the configuration of the building in interaction with the run-up layout and the location of the runway system guarantees optimal path lengths for the passengers and taxiways for the aircraft. Optimised transport processes are the basic requirement for minimum emissions, as well as land use.”

He continued: “The one-roof concept – the clearly structured building arrangement in connection with the storey organisation – is available at the airport for the shortest paths and a definite orientation. This is in view of the interventions in the landscape and the groundwater equally, as well as in the construction of the buildings and roads. Short paths lead to improved surfaces, thus minimising energy consumption.”

Throughout the BBI project, examples of innovative environmental efficiency are evident. For instance, gas turbine cogeneration will be the primary energy source, while rainwater will be collected in cisterns and used for adiabatic cooling and greywater use. The ventilation and air-conditioning is based on the principle of a free-flow micro-climate, and the air is conditioned only in the places, and to the extent, that it is needed.
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Interest in airport investment from private sources unsurprisingly took a hit as a result of the global economic crisis that struck in 2008. Three years on, in the face of sovereign debt crises, analysts now see airport privatisation as a necessary move for some governments, complemented by the return to growth in air traffic in much of Europe, potentially helping to attract additional interest from investors.

Thomas Frankl, CEO of Airport Development Partners (ADP) – a private airport consulting company dedicated to the development of regional airports across Europe – explained that he expects airport privatisation to become far more active in the near term.

“We had been in talks with the former Greek government about airport privatisation, only for those plans to be swept away by the socialist government. We expect to be able to resume the dialogue, and begin to talk to more governments as we expect airport privatisation finally to happen on a much larger scale across Europe,” he said.

Having highlighted “macroeconomic development, in particular a cooler economic climate in the major EU countries, and the solvency issues of EU peripheral countries” as the biggest causes for concern, Frankl added: “This said, we expect growth in emerging economies to continue to provide enough lift to keep the global economy afloat as developed economies finally get on a surer footing.”

Reiner Schränkler, Chairman of the Executive Board, HOCHTIEF Concessions AG, outlined his view that airports worldwide will continue to be viewed as a positive investment opportunity,
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especially given the sector’s much-displayed resolve. “The manner in which the sector has managed various crises in the last few years has shown that airports are a robust and attractive asset class,” he said. “For example, most recently, Athens Airport was able to keep pre-tax profit before extraordinary items at approximately the same level in the crisis year 2010 as in 2009. Our figures are solid proof. Moreover, investments in airports are urgently required in many places. As not nearly all state-owned airport operators will be able to finance the necessary expansion of capacity, further airport privatisations are likely.”

The downside for Europe lies in its weaker air traffic growth patterns compared to other world regions, as well as a penalising policy and regulatory framework.

Secondary sales will also be present, as the case study of German construction group HOCHTIEF demonstrates. The six airports in the HOCHTIEF Concessions portfolio showed a +4.2% year-on-year increase in passenger traffic between January and April, and as the airports continue to display collective strength, the company has disclosed that it will soon sell the HOCHTIEF AirPort division and the related airport projects. The sale will be conducted as a dual track process (simultaneous preparation of a trade sale and an initial public offering), allowing the company to increase both the competition and transaction security. While details on potential buyers remain private, the aim is for the transaction to be complete in the 2011 fiscal year. “The six airports of HOCHTIEF Concessions have performed very well in the first quarter of 2011,” Schränklér said. “Passenger traffic grew dynamically with the exception of Athens International Airport. The number of passengers going through Budapest, Düsseldorf, Hamburg, Sydney and Tirana airports totalled 17.7 million – a +3.9% increase compared with the prior-year quarter.”

This followed a +4.4% increase in overall year-on-year passenger traffic in 2010.

AENA PRIVATISATION

The new Aena Aeropuertos S.A. division will become functional in June as the privatisation of the Spanish airport operator gathers pace. The main difference in the structure of the company will be that the airports will be managed by a company rather than a government institution, and in the medium term up to 49% of this company will be in the hands of private stakeholders.

According to Aena – which manages 47 airports in Spain and has interests in 27 more around the world – this new structure will ensure that the company will have more flexibility in managing the airports, for example, in relation to commercial income.

In June, Aena Aeropuertos will begin a process of market sounding to look for institutional investors and a stock market listing will be considered when the market is deemed suitable.

A significant aspect of the privatisation process will also see the management of Madrid Barajas and Barcelona El Prat airports privatised through a concession to a private partner. The concessional companies will be created in July and the majority of its capital will be sold to private partners before the end of the year through a competitive public bid.
This document is not a complete page from a book or a magazine, so it cannot be accurately converted into plain text. However, I can provide a summary of the content:

**VINGA: OPTIMISING ATM TO REDUCE ENVIRONMENTAL IMPACT**

VINGA (VALIDATION AND IMPROVEMENT OF NEXT GENERATION AIRSPACE) is a one-year project being undertaken at Göteborg Landvetter Airport within the framework of SESAR. The aim is to validate, through operational trials, the environmental benefits of implementing new ATM procedures. Ross Falconer reports.

**VINGA** is a true collaborative project. It is being coordinated by LFV at Göteborg Landvetter, in cooperation with the airline Novair and Quovadis – a company owned by Airbus and which develops navigation technology. Sweden is a leader in terms of environmental initiatives and Göteborg Landvetter is among the Swedavia airports accredited at the ‘Neutrality’ level of ACI EUROPE’s Airport Carbon Accreditation programme. The VINGA project involves studying all phases of flight to determine how environmental impact can be reduced by various industry stakeholders developing solutions in partnership.

“In this project we use and evaluate various ways to start and land the aircraft, allowing them to operate with as little impact on the environment as possible,” said Niclas Wiklander, VINGA Project Manager. “So far, VINGA has matched our expectations. We have demonstrated that by using best practice, together with state-of-the-art technology, we can reduce emissions and aircraft overflying populated areas quite substantially.”

Several methods to reduce environmental impact are being tested, such as optimised taxiing to the runway – in a shorter time and with only one engine running, quicker climb to cruise altitude, and approaches and landings by gliding with minimum thrust via special curved trajectories that shorten the approach.

Alain Siebert, Chief Economics and Environment, SESAR, said: “The idea is to develop a number of arrival and departure procedures to optimise traffic flows at Göteborg Landvetter. The preliminary figures on savings are very impressive. On every approach into Gothenburg, several hundred kilos of CO2 can be saved through enhanced ATM procedures and optimising the capabilities of the aircraft.”

Olle Sundin, Airport Director, Göteborg Landvetter Airport, added that VINGA is an important new element of the airport’s environmental strategy. “We are very proactive in the environmental area. We are continuously looking at the inbound and outbound routes, and try to reduce the number of people affected by noise. VINGA also has the potential to reduce emissions and fuel consumption. My personal conclusion is that this is something really well tailored to small and medium sized airports,” he said.

**FIRST GUIDED VINGA FLIGHT**

A significant breakthrough was made on 7 April, when a Novair A321 landed using two separate navigation systems. The aircraft approached Göteborg Landvetter via a satellite based navigation trajectory, with extremely high navigation precision, and was then guided to the actual landing by the ground based Instrument Landing System (ILS) during the latter part of the approach, to ensure landing in the correct spot. While satellite based navigation allows a more environmentally conscious approach, it currently lacks the accuracy necessary to land in thick fog. In such conditions, the ILS is required.

“Technically we have proven that it is possible to combine these two systems,” explained Wiklander. “Since we are part of SESAR, we can achieve a wide distribution of the knowledge we have obtained. Of course, we hope that the regulations that govern air navigation can be adjusted to these findings, so aviation can regularly utilise this environmentally advantageous technology – in the perspective of emissions, as well as noise.”

The first guided VINGA flight took place on 24 May, similarly with a Novair A321. It was an opportunity to communicate the project and showcase the results. According to Siebert: “The real challenge will be implementing it in day-to-day operations – developing the solution and validating it involving all the partners. The final report will be published in October.”

More than 100 VINGA flights are expected to take place by September, in order to validate the environmental benefits derived from new ATM procedures. The first guided VINGA flight was a milestone for the collaborative effort to minimise the environmental footprint in all phases of flight, and highlights the success of a partnership approach between airport, airline, ANSP and manufacturer.
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NEW TERMINAL TO STRENGTHEN BIRMINGHAM’S GLOBAL CONNECTIVITY

BIRMINGHAM AIRPORT’S NEW TERMINAL WAS OFFICIALLY OPENED BY THE UK SECRETARY OF STATE FOR TRANSPORT PHILIP HAMMOND ON 13 MAY. IT IS THE LATEST PHASE OF THE AIRPORT’S £100 MILLION (£115M) REDEVELOPMENT. THE PROJECT TO MERGE THE AIRPORT’S TWO TERMINALS INTO A SINGLE FACILITY IMPROVES BOTH THE AIRPORT’S OPERATIONAL CAPABILITIES AND THE CUSTOMER EXPERIENCE, AS PAUL KEHOE, CEO, BIRMINGHAM AIRPORT, EXPLAINED TO ROSS FALCONER.

The £13 million (£15m) ‘One Terminal’ development is the latest step in Birmingham Airport’s dynamic strategy for future growth. The airport rebranded last October, dropping the word ‘International’ from its name in a move designed to create positive awareness of its potential and generate loyalty from those living in its catchment area.

There are around eight million people living within an hour’s drive of the airport, but less than 40% of that potential demand uses Birmingham Airport. Kehoe expressed determination to increase that figure over the next few years. “We want people to think about their journey in a new way, and not to be bound by old habits,” he said.

“The new terminal frontage comprises the new ‘Hello World’ messages from its new identity and giant faces from different nationalities welcome customers to the site. The new identity signifies global connectivity from Birmingham Airport and its multicultural environment. Our previous brand identity didn’t reflect what we were about and what we aspire to be in the future. We want to embrace the fact that we can connect people to over 400 different places worldwide and want people to feel proud and excited about the opportunities that lie ahead.”

The airport has also recently restructured its Air Services Development department to bring in new airlines, increasing the route network and delivering profitable growth in air traffic at Birmingham. The strategy is to build relationships and knowledge about the airport, in order to demonstrate to the airlines that they have an important role to play in the realisation of Birmingham Airport’s potential.

Speaking at the opening of the new terminal, Transport Secretary Philip Hammond said: “We
have always been clear that regional airports have a vital role to play in supporting both local and national economies, and improving connectivity. In addition, Birmingham is well placed to help ease the congestion at airports in the south east, and our proposals for high-speed rail could bring Birmingham Airport to within just 38 minutes of the capital.”

GLOBAL GATEWAY

Birmingham Airport handled 8.5 million passengers in 2010 – a decline of -5.8% year-on-year. Factors such as the economic downturn, extreme weather and the volcanic ash cloud were largely responsible for the decrease. Kehoe said: "We always envisaged that 2010 would be a challenging year for the aviation industry, however, I don’t think that anyone could have foreseen the impact of the volcanic ash in April. This event alone cost the airport £2 million (£2.3m) in lost revenue and had a significant impact on consumer confidence.”

The highlight in 2010 was the +17.1% rise in passengers travelling to and from Asia. Emirates’ twice-daily service to Dubai was notably successful. In total, 720,000 passengers flew between Birmingham and destinations such as Islamabad, Dubai, Ashkhabad and Tehran.

Significant growth in passenger numbers is not expected this year. “The market remains fragile and there is still the expectation that 2011 will be another difficult year,” commented Kehoe. “Nevertheless, the investments we are making now will allow us to come out of the economic downturn in a stronger position to take additional traffic and truly become the Midlands’ global gateway.”

BETTER PASSENGER EXPERIENCE

The new terminal has led to the development of a larger centralised passenger security search area, which enables the airport to process passengers more quickly and in a more pleasant environment. Meanwhile, the enlarged arrivals area provides a Costa Coffee, a new M&S Simply Food, a large WHSmith store, and increased lounge space with views of the airfield.

"Most airports under ten million passengers do not need two terminals with two security search areas, two retail and catering offers and split site operations. We therefore embarked on this project to make the operation more efficient, to create a better passenger experience and to offer a facility that is easy to get through," explained Kehoe. "Combining the two terminals into one has been a very challenging redevelopment, with many complicated activities taking place in a 24-hour live operation. A great deal of planning, partnerships and hard work by everyone involved has produced this first-class facility, on programme, on time, and with minimal passenger disruption.”

The redevelopment includes significant expansion of the retail offer. The new 20,000sq ft walkthrough World Duty Free store located airside is 50% larger than the previous offer and features a wider range of products across all categories.

Paul Kehoe, CEO, Birmingham Airport: “Most airports under ten million passengers do not need two terminals with two security search areas, two retail and catering offers and split site operations. We therefore embarked on this project to make the operation more efficient, to create a better passenger experience and to offer a facility that is easy to get through.”

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AERODROME SAFETY: IMPLEMENTING RULES ON A GOOD PATH

Following its mandate by the European legislator, the preparation of the implementing rules (IR) for aerodrome safety is running at full speed. Formal EASA Rulemaking Groups for this area cover authority and organisation requirements (ADR.001), aerodrome operations (ADR.002) and aerodrome design (ADR.003). These groups are composed of and chaired by experts chosen from amongst national authorities and the airport industry. Since July 2010 six large three-day meetings of all groups and several intermediate meetings have taken place. The Rulemaking Groups will deliver the core material, the implementing rules (IRs, ‘hard law’) and certification specifications (CSs, ‘soft law’) – for their respective areas by the end of July 2011. It will also be endeavoured to provide as much of the necessary Acceptable Means of Compliance (AMCs) and Guidance Material (GM) in July.

In the following we summarise briefly the progress of the project. We also introduce the concept of the Certification Basis (CB), which is a description of an aerodrome facility’s design and infrastructure in terms of the regulatory certification specifications (CS) that it complies with. It is the cornerstone of an aerodrome’s certification process.

WORK IN PROGRESS
All the rules on aerodrome safety, including those on authorities and aerodrome operator organisations, will be ‘stand alone’. This means that they are likely to be placed in one single annex to a Commission Regulation. One single book will also contain the certification specifications, and thus the greater part of the transposed ICAO Annex 14.
By the end of July 2011 the first two groups (ADR.001 and ADR.002) will deliver to the EASA team their proposals for the aerodromes rules. The group on aerodrome design will deliver the proposed CS and GM. EASA will then endeavour to evaluate and aggregate the results and to make sure that interfaces are exact, and that the draft rules do not contain any duplications, inconsistencies or omissions. The respective document for public consultation, the so-called Notice of Proposed Amendment (NPA), is subsequently scheduled to be published towards end of this year.

All regulatory activities of EASA must be accompanied by a so-called Regulatory Impact Assessment (RIA), in which the likely impact of new rules on employment, the environment, administration and safety are examined. In our case, the RIA will include a section on why ICAO Annex 14 was used as a basis, as well as the legal instruments that were used to transpose it into the EU order.

In a second part, in addition to the RIA, EASA will provide several complementary ‘case studies’, describing how some sample National Aviation Authorities (NAAs) may adjust to the new rules and how they may choose to apply them. Similarly it will be examined to what extent selected airports may or may not have to adjust.

CERTIFICATION BASIS: CUSTOMISED COMPLIANCE WITHOUT SAFETY COMPROMISE

One of the cornerstones of the new regulatory concept is the possibility of customised compliance with the applicable rules. This will be achieved through the use of an individual aerodrome Certification Basis. The Certification Basis is the means to establish an aerodrome’s compliance, using only the CSs that are considered applicable to it, depending on the aerodrome’s type and operations. The concept’s novelty is that it gives the applicant the flexibility to also use its own specifications if so requested, provided that they have been found to comply with the Essential Requirements (ERs) of the Basic Regulation and provide a level of safety equivalent to that attained by application of the relevant CS. This possibility is expected to promote research into new technologies, resulting in innovative practices on the side of the aerodrome industry.

Thus, under this risk-based approach, limitations which otherwise seem to be embedded into the traditional aerodrome certification “pass-fail” rules and procedures may be overcome by employing mitigation measures, without compromising the desired safety level.

The awarding of an aerodrome certificate is a split process (see diagram above). It involves the establishment of the Certification Base (left hand side) using:

- the applicable Certification Specifications (CSs);
- any Equivalent Level of Safety (ELOS);
- any special conditions (SCs) determined and notified by the NAA.

Following this, the Aerodrome Manual and aerodrome inspections (right hand side of the diagram), are used to assess the aerodrome operator’s ability to meet the requirements of the Basic Regulation, that is the Essential Requirements (ER) and Implementing Rules (IR). The AMCs are acceptable means of compliance provided by the Agency as one way to demonstrate compliance. The operator may suggest alternative means of compliance (AMOC) which the NAA may accept.

The NAA will issue the certificate(s) when:

- the applicant has shown that the aerodrome complies with the agreed CB;
- the aerodrome has no features or characteristics making it unsafe for operation;
- it has found the Aerodrome Manual submitted by the operator acceptable; and
- the aerodrome operator has demonstrated, to the satisfaction of the NAA, compliance with the applicable requirements of the ERs and IRs and any other applicable requirements, that have been notified by the NAA.

This process, being developed in the rulemaking group ADR.001 on authority and organisation requirements, will be described in more detail in the forthcoming NPA.

For more information on EASA activities in the field of airports and ATM: easa.europa.eu/atm
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The development of Lisbon Airport – the busiest in Portugal having handled more than 14 million passengers in 2010 – is built upon four main goals: to increase capacity; to enhance operational and service levels; to improve non-aeronautical revenues; and to consolidate the airport’s existing position as a regional hub.

Over the course of the last decade, Lisbon Airport has experienced an average annual increase in passenger numbers of +7% and as it continues to be one of the fastest-growing airports in Europe, the facilities continue to be developed to allow for as many as 18 million passengers by 2017.

Following the construction of the new Terminal 2 in 2007 – which was built specifically for domestic services – Terminal 1 is now the focus of the development plan.

“The main Terminal 1 was freed up by the new building and the structure is in the process of being optimised,” explained ANA Aeroportos de Portugal’s Rui Oliveira. “Along with new parking areas, there will be a new north pier and a new north bus gate, both attached to the main terminal. New cargo facilities, a new fuel farm, a renovated baggage claim area and a metro station are also planned.”

Once the plan is complete, the airport will be at maximum capacity with 40-42 movements per hour and no room for further expansion, due to the surrounding urban environment.

ANA’s focus on developing non-aeronautical revenues pays special regard to retail and ancillary revenues due to their important role in both the overall passenger service that is offered and the sustainable development of the airport.

Oliveira said: “Airports must understand the needs of their airline partners and develop new business models that bring a profitable future for all parties. All of this work culminates in the fourth goal, which is the consolidation of the airport’s position as a regional hub. Despite the difficulties involved in optimising a space-constrained hub, the airport’s status has to be maintained, if not enhanced.”

DEVELOPING THE PORTFOLIO

As well as the development of Lisbon Airport, ANA is also committed to developing the six other airports under its stewardship, and the Faro Airport Development Plan is currently being implemented at Portugal’s second-busiest airport.

The Development Plan will see a total investment of €30 million, with €6 million being granted by the Trans-European Transport Network (TEN-T). While the airport handled more than five million passengers in 2010, the project will allow for a significant increase in the passenger processing capacity, as well as an increase in service quality thanks to the addition of new boarding gates and rapid runway exits. The investment will also allow the airport to reach 100% safety compliance with ICAO Annex 14. All airports in the ANA group are currently Airport Carbon Accredited and ANA’s dedication to environmental efficiency is also evident in each of the development projects and this commitment was recently recognised by the ‘Most Efficient Company’ award at the first Energy Efficiency Awards in Portugal. The PremiValor Consulting initiative was supported by energy agency ADENE and the Directorate General for Energy and Geology (DGEG), and the study covered the 2,500 largest companies in the country.

As the facilities and processing capacities are increased via the ongoing investment, developing the existing route network also remains a top priority for ANA. Co-financed by Lisbon Airport, the Lisbon Tourism Association and the Portuguese Tourism Bureau, the €17 million Route Development Fund has been established for the next five years, while all airports have also implemented a Performance Reward System to assist airline customers in exploring new route opportunities.

Following the construction of Lisbon Airport’s new Terminal 2 in 2007, the main Terminal 1 is now the focus of the ongoing development plan.
SIEMENS OFFERS CAPACITY SOLUTION

FOR SHORT-TERM capacity increases, Siemens offers CapacityPlus: for a predetermined period of time – anywhere from one month to several years – a temporary airport terminal can be set up to provide additional processing capacity.

CapacityPlus is specially designed to optimally address a number of scenarios: passenger capacity increases during special events, such as fairs, trade shows, sports and cultural events; compensation of terminal capacity loss and bridging mid-term capacity bottlenecks during an airport expansion or modification, or when development of passenger numbers outpaces capacity expansion measures; and provision of temporary passenger capacity in new locations to promptly respond to short-term demands, for example low-cost carriers that open and close new locations more frequently.

Gold Sponsor

SEITENS OFFERS CAPACITY SOLUTION

SITa’S COMMERCIALISATION PROGRAMME

AIRPORT IT DEPARTMENTS are under increasing pressure to reduce costs while improving the quality of service they provide. At the same time, airports are looking for ways to develop non-aeronautical revenue.

In response to these challenges, SITA has developed a commercialisation programme designed to help airports establish themselves as ICT service providers. The programme offers a number of potential benefits for airports, including: reduced IT and operations costs, increased non-aeronautical revenue, the ability to create savings for airlines, and improved airport operations.

SITA divides the commercialisation process into identifiable stages. The journey begins with a general introduction to the benefits of airport commercialisation. At the airport’s request, SITA next delivers a workshop based around its proprietary “Service Provider Maturity Model”, which allows for the assessment of an airport’s current situation and helps the airport define its target level of commercialisation maturity.

The next step is a Joint Opportunity Assessment. This comprehensive assessment identifies the scope of the commercialisation opportunity and the associated risks.

This is not a “one size fits all” solution; SITA relies on its unique understanding of the air transport IT industry to develop a customised plan for every airport. The commercialisation programme results in increased non-aeronautical revenues, improved IT infrastructure and a more efficient operational environment.

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MENZIES COMMITTED TO SAFETY

MENZIES AVIATION is a global provider of passenger, ramp and cargo handling services. Through a combination of organic growth, acquisitions and the development of niche opportunities, the company has established itself as a major force in the international ground handling industry.

Operating at more than 117 airports in 27 countries and supported by a worldwide team of more than 16,000 people, Menzies serves over 500 airline customers, handling over 700,000 flights, 71 million passengers and 1.7 million tonnes of cargo per annum.

For Menzies, safety and security are absolute requirements. The company aims to provide a safe working environment in which the health and safety of its employees and passengers is never compromised.

To this end, Menzies has made health and safety an integral component of all its management systems and working practices.

Stand 8

COMMUNIQUÉ AIRPORT BUSINESS: SUMMER 2011 – P70
Passenger-friendliness. Isn’t that what it’s all about?

Frankly? No. Of course, passenger-friendliness is high on our list. But it is not the only thing up there. Innovation, to us, is about improving conditions in general. For passengers, of course. But also for personnel, for the people living around us, and for society as a whole. For travellers, for example, we developed fast, automated border passages by biometric iris recognition. And when security scans turned out to cause a greater sense of insecurity, we built software that provides automatic visual alerts, without the aid of human eyes. On an entirely different scale, we built an automated baggage system that will handle 70 million pieces of luggage per year. We purify wastewater, using algae. And we aim to operate carbon neutral by 2012. So yes, passenger-friendliness is what much is about, but there’s more. Much more.
AENA’S AIRPORTS DIVISION

AENA AEROPUERTOS IS the world’s leading airport operator, according to passenger figures – close to 200 million – managing 47 airports and two heliports in Spain, while participating directly and indirectly in the management of another 27 airports around the world.

Aena Aeropuertos is a corporate leader in the management of airport services thanks to its experience, capacity and team of professionals. The company offers its clients and users comprehensive, effective and top-quality services to make their passage through the airports a pleasant experience.

Each of the airports in the portfolio is modern and functional. They feature the latest technologies, designed to serve passengers during their time in the airports, and a varied range of premium commercial and dining services. Fully accessible, they are designed with everyone in mind, offering complete attention to passengers with reduced mobility.

Aena Aeropuertos is a responsible company, conscious that it should fulfil its role as an economic engine in its airports’ areas of influence through a permanent commitment to development and sustainability.

Stand 30

RAYTHEON UK’S CLEAR VIEW

RAYTHEON UK IS launching the Clear View family of security solutions for border security and critical infrastructure protection to the European market at the ACI EUROPE Annual Assembly.

“The Clear View security management system has been developed by Raytheon by applying industry-leading expertise in mission-critical solutions for operational effectiveness, short connection times and functionality today, tomorrow and throughout the entire life cycle. Vanderlande offers all baggage handling technologies, including integration of robotics, vision technology and RFID.

Vanderlande Industries’ solutions combine operational effectiveness, short connection times and high conveyability. With the broadest range of products and IT, it can meet any airport’s demands in full – from check-in through transportation, and sorting systems to baggage reclaim.

With over 600 references from regional to large international airports worldwide, Vanderlande can offer all baggage handling technologies, including integration of robotics, vision technology and RFID.

Vanderlande strives for close cooperation with its customer, extending from initial analysis of the underlying business processes through to total life-cycle support. This enables airports to continuously improve, increase effectiveness and lower operational costs, while raising service levels and creating true value for their customers.

Stand 19

WORLD-CLASS TRAVEL RETAIL

With sales of €2.2 billion in 2010 and nearly 2,000 stores, LS Travel Retail, a division of the Lagardère Services Group, is a world leader in travel retail. It operates in more than 20 countries throughout Europe, North America, Asia and the Pacific, at over 120 airports and other travel locations. It provides landlords with the full range of travel retail concepts: duty free and luxury, specialty, news, books and convenience, gourmet food, souvenirs, and food & beverage.

Aelia, the core duty free and luxury competence and branding centre, supports the operation of over 160 stores at 28 airports in Europe and Asia, including Paris Charles de Gaulle, Singapore Changi, Nice Côte d’Azur, London Luton, Prague Ruzyně and Warsaw Frédéric Chopin. In duty free, LS Travel Retail trades mainly under the Aelia Duty Free and Buy PARIS DUTY FREE banners.

With its internationally renowned Relay brand, LS Travel Retail is also a leader in the news and convenience segment. The group also operates sales onboard airlines through its subsidiary Aeroboutique Inflight Retail (Air France, Iberia and Alitalia), onboard ferries, at port stores in Spain, and at the Eurotunnel and Eurostar terminals on the French mainland.

Stand 18
CONTRAC’S AIRSIDE BUSES

MANUFACTURED BY CONTRAC Cobus Industries, more than 2,600 Cobus low floor aluminium airside buses are in operation in 90 countries with 250 different customers. The Cobus Euro 5 is available with two different types of engine: diesel or CNG-powered. The latest Cobus generation ranks among the most environment-friendly and efficiently motorised vehicles used on the airside. Different sizes and executions are available to serve customers’ requirements. The flagship is the Cobus 3000 (14m length, 3m width). With a passenger capacity of up to 112, it is the most economical way of passenger transportation on the airside. With the Cobus 2500, Contrac Cobus Industries pays attention to the rising demand for smaller airports, which can also be operated outside restricted airport areas. Contrac Cobus Industries will offer the Cobus 2500 with three different types of engines: diesel, CNG, and electric drive.

Stand 7

NAV’S AIR NAVIGATION

NAV PORTUGAL IS the provider of air navigation services in the airspace under Portugal’s responsibility, which includes the airspace over the continental area, Azores and Madeira Islands, as well as a wide area over the North Atlantic Ocean. In its scope, NAV Portugal has the mission of planning, guiding and controlling air traffic, in both the Flight Information Regions of Lisbon and Santa Maria, ensuring compliance with international and national legislation, with the best safety conditions, optimising capabilities, improving efficiency, and without neglecting environmental concerns. NAV Portugal has two Air Traffic Control Centres, one in Lisbon and the other in Santa Maria.

Stand 15

COFELY’S AIRPORT EXPERTISE

COFELY AIRPORT SERVICES is a global partner in operating and maintaining airport technical facilities. The key to its success lies in its long-term tailor-made contracts, which include a total guarantee that all installations will be kept in perfect working order over its “life time cycle”.

Cofely Airport Services provides operational management on the landside, such as HVAC (heating, ventilation and air conditioning), electricity, sanitary, fire detection and protection, and management of all “non-corebusiness” facility management activities with appropriate SLAs.

The company boasts extensive experience in a wide range of operation and maintenance activities for specific airport facilities, such as baggage and cargo handling systems, X-ray screening machines, boarding bridges, airplane docking guiding systems, 400Hz power supplies, PCA (pre-conditioned air supply), apron and runway lighting, and much more. It also has an extensive offer in automation and IT services.

Stand 9

GLOBAL MEETING PLACE

WORLD ROUTES, THE World Route Development Forum, is the global meeting place for every airline, airport and tourism authority. It is the place to examine air services, find out about new market developments, and get up to speed on the up-coming destinations, providing airports and airlines with unrivalled business development opportunities.

For airlines, airports, tourism authorities and other stakeholders, World Routes is the place to learn, to negotiate, to build relationships and help shape your business so that it has the competitive edge it needs in the coming years to grow and thrive.

In 2011, there will be new and enhanced meeting choices for delegates, whether through the traditional one-to-one 20-minute meetings in the halls, or at strategic meetings in the chalets and stands.

The 17th World Routes is hosted by Berlin Airports and will be held in Berlin, 2-4 October 2011.

Stand 23

COMMITTED TO technologically advanced, cost-effective and reliable display solutions, Conrac is a market leader for the supply of public displays. The company has supplied tens of thousands of public displays, including to over 200 airports worldwide.

Contrac’s headquarters, R&D and production are based in Weikersheim, Germany, and a global network of subsidiaries and sales offices, as well as sales and service partners in more than 60 countries, ensure that the company is as close as possible to the customer.

Among the latest products for airport applications are passenger information solutions for the arrival at the parking lot or train station, passenger information in the terminal, and applications in baggage handling. A great variety of products and features provide the best solution for any application, from public environment to the tough requirements ‘behind the scenes’ in baggage handling or outdoor applications.

The latest products include a giant 70”-high brightness display, ideally suited for the display of arrival or departure information and ‘stretched’ format displays for applications with restrictions in space – both for indoor and outdoor use. There are also new software features for Conrac’s MAXCS software suite, such as the new Display Manager.

Stand 3

The Cobus 2500 will be offered with three different types of engines: diesel, CNG, and electric drive.

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Stand 7

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COMMUNIQUÉ AIRPORT BUSINESS: SUMMER 2011 – P73
**AWARD-WINNING ENERGY MANAGEMENT**

**LOGICA IBERIA’S RENEWABLE ENERGY**

Energy Management System (RMS) was recently selected for top honours in innovation at the North American Renewable Energy World Conference & Expo in Tampa, Florida.

Renewable Energy World Network editors chose Logica’s RMS as the winner of this year’s Excellence in Renewable Energy Award for Innovation in Technology. The innovation award recognises cutting-edge projects, people and technologies in four clean energy industry sectors.

RMS provides a scalable platform to support the business needs of operators with a large portfolio of wind energy production. Unlike most systems, RMS can control and manage all major turbine types for centralised command and control. RMS is a fundamental building block that facilitates increasing levels of wind energy production on the grid. The solution interfaces with production forecasting, energy trading, metering, maintenance, and workforce management systems.

It was deployed for Horizon Wind Energy in North America last year. Horizon Wind Energy is based in Houston and owned by EDP Renewables, a subsidiary of EDP. The company operates 27 wind farms with 1,900 turbines across North America.

**Stand 35**

Renewable Energy World Network editors chose Logica’s RMS as the winner of this year’s Excellence in Renewable Energy Award for Innovation in Technology.

**MOVING PEOPLE IN AIRPORTS**

**THYSSENKRUPP ELEVATOR IS** one of the major project partners for new airports, as well as for the expansion and modernisation of existing facilities. The group’s portfolio includes passenger boarding bridges (PBBs), escalators, moving walkways, passenger and freight elevators, stair and platform lifts, as well as tailored service solutions for all products.

In 2006, ThyssenKrupp Elevadores Portugal and ThyssenKrupp Airport Systems installed 44 lifts, 51 escalators and 11 Crystal PBBs for Oporto Airport, and they are currently manufacturing and installing 16 lifts, 10 escalators and four moving walkways for the expansion and modernisation of Lisbon Airport.

Further important awards received recently from airports around the world are the 77 Crystal PBBs for Kunming Airport (China), six lifts and escalators for Luanda Airport (Angola), six PBBs for Skopje Airport (Macedonia), nine PBBs for Lubbock Preston Smith Airport (USA), and 18 Crystal PBBs for Frankfurt Airport (Germany).

ThyssenKrupp Elevator has installed 13 elevators and 18 escalators at Bucharest Airport (Romania) and is manufacturing and installing four moving walkways. Two of these units stand out particularly: at 74.85m and 61.80m respectively, they are the longest moving walkways in the country.

**Stand 21**

In 2006, ThyssenKrupp Elevadores Portugal and ThyssenKrupp Airport Systems installed 44 lifts, 51 escalators and 11 Crystal PBBs for Oporto Airport.

**UNISYS’ SECURE SOLUTIONS**

**UNISYS PROVIDES SOLUTIONS** in passenger facilitation, airport operations and security. Its solutions, consultancy and systems integration services help to resolve the conflict between improved passenger service and increased security, while addressing the need to reduce costs, enhance revenues and manage risk.

Unisys Next Generation Airport Passenger Security Solution is aimed at helping airlines and airports speed passenger processing time, reduce costs and create a more secure and convenient experience for air travellers around the world.

Drawing on the company’s experience with the aviation industry and advanced biometric-based security solutions, the new Unisys solution will integrate the various stages of the passenger experience with a biometric component to identify each passenger.

This Next Generation Airport Passenger Security Solution builds on Unisys’ longstanding aviation and security expertise. Unisys has worked with some of the world’s major airports, including Los Angeles World Airports, Beijing Capital International Airport, Delhi International Airport, Aéroports de Paris and Madrid Barajas Airport. Unisys’ systems are currently used by over 200 airlines and 600 airports around the world.

The solution also leverages Unisys’ experience as a leading provider of integrated identity credentialing solutions in countries such as the United States, Australia, South Africa, Chile, Philippines, Mexico and Spain.

**Stand 1**

Unisys’ Systems are currently used by over 200 airlines and 600 airports around the world.
OUR PASSENGER COMMITMENTS

Gatwick

Gatwick wants to deliver the service you expect at every stage of the airport journey.

We think it’s quite simple:

We’ll treat you as our guest — We’ll always try to offer you the very best possible airport experience or make it right if we don’t.

We hate queues — We know you do too, so Gatwick is working hard with our staff and airport partners to keep queues in all areas to a minimum.

We love to be on time — We’ll do our best to get you away on time.

In partnership with:
The destination of your search for more passengers – VIE, with a catchment area of 15.8 million people.

Located at the heart of Europe, Vienna Airport is the ideal gateway to the growing markets of Central and Eastern Europe. With a high proportion of business travellers, upcoming tourism markets and excellent transport links, VIE is the best place to get in and out of this booming area.