INTERVIEW

Siim Kallas, EC Vice President responsible for Transport

EC AIRPORT PACKAGE

What airports can expect

EU-RUSSIA AVIATION SUMMIT

Is liberalisation finally within reach?

AVIATION SECURITY UPDATE

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Fly to Prague
There’s an old saying that good news doesn’t sell newspapers. With the ongoing saga of the Eurozone sovereign debt crisis, I’m sure I’m not the only one who would gladly buy a newspaper pushing an overdue wave of good news. As it stands, the headlines look set to be gloomy for some time. The impact of the sovereign debt crisis on aviation is already significant. Freight traffic stopped growing before the summer and has since gone into negative figures. Weakening business confidence has led companies to stop replenishing stocks with industrial output in Europe now at a standstill – or even decreasing, the awful truth is evident: recession is at our doorstep.

This means that beyond freight, the surprisingly strong performance in passenger traffic into the autumn is going to be short-lived. Airlines have downsized capacity for the winter and they will keep focused on yields to protect their financial position and avoid digging into cash reserves. Their ability to keep growing unit revenues through fare and surcharge increases has been quite remarkable – with some achieving up to 32% increases in yields between January and September. In the Irish market alone, this has resulted in €300 million of additional revenues for airlines – far exceeding the total amount of charges they pay to Irish airports for a full year. Not bad in the present environment.

The recovery in airport revenues has significantly lagged behind the recovery in traffic volumes. The same cannot be said for airports. The recovery in airport revenues has significantly lagged behind the recovery in traffic volumes. Sky rocketing capital costs have eased somewhat, but independent experts say that too is set to be short-lived. Many airports with public shareholders are already affected by a lack of infrastructure to support new demand. Not so long ago, that proximity used to be an asset. It now looks like a liability, bringing tough times for getting debt refinanced or accessing fresh capital.

All this means that for Europe’s airports, securing profits will be challenging. This is not very comforting, especially when considering that profitability for the top 20 European airport groups kept decreasing last year. Tight cost control will dominate management’s thinking, with the risk of putting on hold investment in modernisation and future expansion. Meanwhile, the race to develop airport capacity continues unabated in the Middle East and Asia…

Under these circumstances, we at ACI EUROPE are more focused than ever on serving and providing value for our members – both airports and World Business Partners. We have made huge strides in shaking off the perception that airports are mere infrastructure providers, just there to "look after" their national carriers. European airports are now proper businesses in their own right, with diverse business models, strong customer focus and elaborated network development strategies. We are succeeding in getting the message out there, but that transformation still needs to be communicated, promoted and reiterated. Our social media activities (you can follow us on @ACI_EUROPE on Twitter), the new Airports in the News’ feature in this magazine and our daily newswire receive great reaction from a wide range of stakeholders, for highlighting some of the excellent initiatives airports all over Europe are undertaking.

Sim Kallas, the EC Vice President in charge of piloting European transport policy, is one of our primary institutional stakeholders. In this issue, he shares with us his views about airports as well as his priorities for European aviation. Obviously, putting him on the cover of our magazine just as he is redefining European airport policy – with a proposed focus on capability and quality – owes nothing to coincidence.

We are releasing this issue at our 6th AIRPORT EXCHANGE event, taking place in Abu Dhabi at the end of November. While the event continues to address the full spectrum of airport management with over 1,000 delegates and a state of the art exhibition, for the first time, it is expanding beyond Europe. Thanks to our cooperation with ACI Asia-Pacific, we are indeed bringing AIRPORT EXCHANGE to the world’s fastest growing aviation market.

This will also coincide with the extension of our flagship climate change initiative – Airport Carbon Accreditation – to the Asia-Pacific region, another bold move in further raising the profile of our industry. And a refreshing piece of good news, particularly as global environment experts come together for COP17 in Durban next month.

By Olivier Jankovec, Director General, ACI EUROPE
Warsaw Chopin Airport
Warsaw Chopin Airport was at the centre of a drama on 1 November, as a B767 was forced to land on its belly on the airport’s runway. Warsaw Airport’s response was commended by the aircraft’s pilot, and the public were kept well informed by the airport’s social media and other communications efforts.

London City Airport
London City Airport has lauded social media as an important contributor to its customer satisfaction scores, which are at an all-time high. Citing a recent ACI EUROPE report on social media, the airport also drew attention to its innovative Twitter app, which allows passengers to get live flight updates to their mobile devices.

Amsterdam Schiphol Airport
On 19 October Amsterdam Schiphol Airport celebrated the arrival of its billionth passenger in October, with an impromptu festive welcome for Inge Serne, who arrived from New York. The airport, which opened in 1920, previously celebrated its 500 millionth passenger in June 2000.

Lisbon Airport
Belgium’s Liege Airport has signed a Memorandum of Understanding with China’s Chongqing Jiangbei International Airport, on 25 October. Liege Airport CEO Luc Partoune explained how the move would open up the world for the airport’s operators.

Frankfurt Airport
Frankfurt Airport opened its fourth runway on 10 October, which will ultimately raise the airfield capacity by 50% per hour. Opened by German Chancellor Angela Merkel, the runway should help the airport in the face of increased international competition, and is the fruit of a proposal first made back in 1997.

Ensure that ACI EUROPE is up to speed with the latest news concerning your airport by contacting us via communiqué@aci-europe.org or via our Twitter feed @ACI_EUROPE

Avinor
Multiple-airport operator Avinor has launched its first step towards setting up an aviation biofuel production centre for Norway. A tender has been put out to report on how this could be done in a commercially viable manner.

Malta International Airport
Malta International Airport (MIA) will give a 100% refund of landing fees to all scheduled airlines up to the end of March 2012 to stimulate traffic. MIA CEO Austin Calleja described the initiative as an investment to tackle the ever present issue of seasonality.

Varna Airport
Bulgaria’s Varna Airport is to temporarily close its doors for a major revamp, including terminal expansion, after the 2011 tourist season. The works are part of a 3 year project, over the course of which airport operator Fraport Twin Star Airport Management will pump in circa €85m, and create 1500 jobs.

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Zagreb Airport
The competition to win the concession over the new Pleso Airport in Zagreb continues, with October seeing the field being whittled down to 6 contenders, and an announcement of the winning bid anticipated in March 2012. The victor will partly finance and operate the new terminal.

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TAV Airports Holding
TAV Airports is being put up for sale, with a €2bn price tag. Industry observers say the price is driven by TAV’s proven success in non-aeronautical revenue generation, as well as the company’s significant growth potential.

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KALLAS FOCUSED ON SINGLE EUROPEAN SKY AND AIRPORT CAPACITY CHALLENGE

Siim Kallas, European Commission Vice-President Responsible for Transport, assumed his current portfolio in February 2010, succeeding Antonio Tajani. He spoke to Airport Business about a range of issues, including the forthcoming Airport Package, capacity in the air and on the ground, the Single European Sky and aviation liberalisation. Ross Falconer reports.

Immediately prior to taking over the Transport portfolio, Kallas was European Commissioner for Administrative Affairs, Audit and Anti-Fraud (2004-2010). He is also a former Prime Minister of Estonia (2002-2003), during which time he concluded negotiations for the country’s accession to the EU.

He faced his first real test as Commissioner for Transport during the Icelandic volcanic ash shock in April 2010, just two months after taking office. His reaction coupled with the response of his services in DG MOVE and industry stakeholders was vital to resolution of the unprecedented situation which occurred. Since then, he has had very regular interaction with all sides in the aviation industry, within groups such as EU Aviation Platform and the European Aviation Crisis Coordination Cell (EACCC), both of which were established since he took office.

The effectiveness of the European Aviation Crisis Coordination Cell (EACCC) was evident, in response to the eruption of the Grimsvötn volcano in May of this year. The EACCC includes senior representatives from the European Commission, EUROCONTROL, the European Aviation Safety Agency (EASA), Member States, aviation industry stakeholders such as ACI EUROPE and unions. The coordinated response and collaborative decision-making ensured the negative impact of the Grimsvötn eruption was significantly less than that during the first Icelandic volcanic ash crisis in April 2010. “In the first volcanic eruption – Eyjafjallajökull – there were 100,000 flights cancelled and in the second – Grimsvötn – 8,000 flights cancelled,” said Kallas. “While it was a smaller eruption with different

Kallas is supportive of ACI EUROPE’s programme Airport Carbon Accreditation and its “crucial role in helping to move European aviation onto a more sustainable footing”. Indeed, he has participated in the certification ceremonies for Paris-Charles de Gaulle, Paris-Orly, Brussels and Budapest airports.

“Europe is currently a world leader in aviation, but maintaining the status quo is simply not an option – competition is increasing, particularly from the Middle East and Asia-Pacific, and to a lesser extent Latin America.”
characteristics, we also changed the system of cooperation between Member States, different air traffic authorities and aviation industry stakeholders, and the estimation is that if we had the same system in place during the Eyjafjallajökull eruption, 300,000 flights would have been cancelled rather than 100,000. The cooperation between these organisations has resulted in a tremendous improvement.

Warming to the discussion, Kallas commented “Europe is currently a world leader in aviation, but maintaining the status quo is simply not an option – competition is increasing, particularly from the Middle East and Asia-Pacific, and to a lesser extent Latin America. To confront this, we urgently need to make the system more efficient and more competitive,” said Kallas. “In relation specifically to airports, the major issue is the ‘capacity crunch’ – the growing gap between capacity and demand at a number of busy EU hubs. Congestion at these airports will remain a concern. Even though forecasting traffic is an uncertain science, traffic will continue to grow in the future, as it did over the last 50 years despite periods of economic downturn and other disruptions. Air traffic in Europe, in particular, will grow slower than in emerging economies, but it will nearly double by 2030. However, Europe’s airports will not have the capacity to meet 2030. However, Europe’s airports will not have the capacity to meet a large part of this demand. "I will not have the capacity to meet a large part of this demand."

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Single European Sky

Naturally, the Single European Sky programme is a hot topic in this regard, as it is the centrepiece of aviation policy at EU level right now. Airports have a vital role to play in the project, as ground coordinators. Accelerated implementation of the Single European Sky is essential to improving the framework for a competitive and sustainable air transport system in Europe, but Europe’s air transport system will not maintain its leading position without the necessary infrastructure.

“Our major priority for aviation is to develop the Single European Sky, which means a fundamental change in Airport Traffic Management (ATM) – new technology and a new structure for ATM in Europe,” explained Kallas. “In aviation, our actions must be directed towards increasing punctuality and improving reliability. Secondly, investment into the airports and necessary supporting services is also important.”

The SESAR (Single European Sky ATM Research) programme represents the technological dimension of the drive towards a Single European Sky. It will eliminate the fragmented approach to Air Traffic Management, transforming the ATM system and synchronising all stakeholders. At the ACI EUROPE Annual Assembly, held in Lisbon in June, the SESAR Joint Undertaking signed a cooperation agreement with ACI EUROPE to engage its technical expertise in the programme. “SESAR is, of course, very important. The Development phase will be complete in 2013 and next we will move to the Deployment phase, which will require an investment of some €30 billion. I would like to underline that we have signed an agreement with the US to ensure that we will have interoperable systems with their own NEXTGEN project,” commented Kallas. “As SESAR moves towards Deployment, it should triple capacity in the air and raise safety by a factor...”
Aéroports de Montréal firmly believes that when it comes to the environment, it’s important to walk the talk. That’s why we’ve already implemented programs to increase energy efficiency and reduce greenhouse gas emissions both within and beyond our facilities. For example, we’ve improved our HVAC efficiency by 70%, and we’re also concentrating on better lighting management. In terms of ground transportation, we’re actively working towards the implementation of an airport shuttle, and our vehicle fleet is more eco-friendly. And in recent developments, our ongoing involvement in promoting green spaces near our site will contribute to the reproduction of monarch butterflies that migrate to Mexico. That’s a lot more than just talk. To find out more, visit www.admtl.com.
of 10. It will also reduce carbon emissions by 10% for each flight and cut air traffic management costs by 50%.

Another central element of the Single European Sky is reducing the current 87 portions of European airspace into nine Functional Airspace Blocks (FABs) by December 2012. According to EUROCONTROL, delays in Europe attributable to ATM account for 1,000 hours each day and are partly attributable to airspace fragmentation. Within a FAB, air traffic flows and air navigation services are integrated and managed according to operational needs rather than national boundaries, resulting in more efficient use of airspace and significant capacity gains. “Governments decided to reform the existing system via performance target schemes. Of course, we are urging governments to be ambitious enough to ensure that the 2012 Functional Airspace Blocks can really happen,” said Kallas.

TEN-T

Returning to the Transport 2050 theme of ‘infrastructure shapes mobility’, in October, the European Commission adopted a proposal to transform the existing patchwork of national networks into a new Trans-European Transport Network (TEN-T) (see article on p30). The ambitious policy follows a major two-year consultation involving Member States, regions and stakeholders, and establishes a core transport network to be established by 2030.

Kallas advocates improved co-modality. “There are 82 airports on the new TEN-T core network, and there is an obligation for 37 of those to be connected to rail. “The numbers speak for themselves. They send a very clear signal about the high political importance given to airports in the future European transport infrastructure.”

Aviation liberalisation

ACI EUROPE released a special publication – ‘Expanding Europe’s Aviation Market – Prerequisite for Global Relevance’ – at its Annual Assembly in June. It calls for an acceleration of aviation liberalisation led at EU level. The impact of the Single European aviation market created in the 1990s has been phenomenal; figures from the ACI EUROPE publication show that it contributes more than €120 billion to Europe’s economy and three million jobs. Meanwhile, the Transport 2050 White Paper indicates that the aim, by 2020, is to complete the extended European Common Aviation Area of 58 countries and one billion inhabitants, which would create a truly integrated aviation market covering the EU and its closest regions.

“Aviation liberalisation has hugely benefited EU citizens in terms of lower prices and more choice of routes. We need to accelerate this work. We are working to expand the European aviation area to cover potentially one billion people and then even further than that,” said Kallas. “The first priority is, of course, to expand towards our closest neighbours, including the Mediterranean and Eastern Partnership countries. Then we need to expand our Common Aviation Area to the BRIC (Brazil, Russia, India, China) and ASEAN (Association of South East Asian Nations) markets, like Singapore, and beyond. Our level of ambition must be very high, but to negotiate aviation agreements we need a mandate from Member States, and some Member States can be far too reluctant to give that, wrongly suspecting that they would be better negotiating alone. That is not sustainable.”

An EU-Russia Aviation Summit, jointly organised by the European Commission and the Russian Ministry of Transport, took place in St Petersburg in October, with the aim of enhancing political, technical and industrial cooperation in the aviation sector between Russia and the EU (see article on p22). ACI EUROPE has called for a single aviation agreement liberalising air traffic to replace bilateral agreements between Russia and EU Member States. “The EU-Russia Aviation Summit was a success and we very much appreciated the
However, the lack of agreement with the US, which informed the European Commission that it would impose extra screening requirements on flights bound for the US, and lack of uniform implementation across Europe, resulted in the adoption of new legislation removing this interim phase completely. All efforts are now being put into the complete removal of LAGs restrictions in 2013. ACI EUROPE is a key member of the European Commission 2013 Liquids Working Group (2013-LWG) that has been formed to study the implications for the removal of the ban in 2013 (see article on p27).

Kallas commented: “The European Commission is committed to the 2013 deadline for the full lifting of the liquids ban at EU airports. In order to make sure that appropriate and concrete steps are taken the Commission has set up a group of security experts (2013-LWG) consisting of Member States and the aviation industry. The 2013-LWG will facilitate organising of operational trials and the drafting of information material for the travelling public, as well as the coordination with international partners. I’m happy that ACI EUROPE is actively participating in this work.”

‘Constructive cooperation’

In Kallas’ own words, “cooperation with ACI EUROPE is very constructive”. “During my time in office, I have had the pleasure of meeting with the previous ACI EUROPE President, Ad Rutten, and the current ACI EUROPE President, Declan Collier. My staff are in close contact with the Director General, Olivier Jankovec, and other members of the ACI EUROPE staff.”

Kallas is particularly enthusiastic about ACI EUROPE’s flagship climate change initiative Airport Carbon Accreditation and its “crucial role in helping to move European aviation onto a more sustainable footing”. Indeed, he has given his personal support to the programme, participating in the certification ceremonies of Brussels Airport, Budapest Airport and Paris-Charles de Gaulle and Paris-Orly airports. “Airport Carbon Accreditation is a wonderful idea. I highly appreciate this initiative of Europe’s airports. It is important that such initiatives come from industry stakeholders,” he commented.

Kallas recognises that air transport plays in an irreplaceable role in maintaining Europe’s competitiveness, and its function as a primary enabler of jobs and growth. He also acknowledges the importance of addressing the capacity challenge, both in the air and on the ground, and that, with increasing competition from the Middle East, Asia-Pacific and Latin America, maintaining the status quo is not an option. The forthcoming Airport Package is, therefore, awaited with great interest. “The Airport Package is one important part of the overall aviation strategy and we really want to focus on measures that increase the capacity of airports. We have close contact with Europe’s airports and they will, of course, be consulted on the Package,” concluded Kallas.

Kallas: “Aviation liberalisation has hugely benefited EU citizens in terms of lower prices and more choice of routes. We need to accelerate this work. We are working to expand the European aviation area to cover potentially one billion people and then even further than that.”
This is a very international conference, we’re listening to people in America, in Europe, Asia, the Middle East, and we’re learning new things all the time, from the Chief Executive all the way down.

Declan Collier,
Chief Executive,
Dublin Airports Authority, Eire

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Marcel Plaum, Senior Manager
Traffic & Terminal Management,
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Francisco Miguel Pestana Brandao da Silva Oliveira, ICT Senior Advisor, ANA, Aeroportos de Portugal SA, Portugal

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THE POSSIBILITIES ARE ENDLESS

Proud host of ACI Europe Airport Trading Conference and Exhibition, 23.-25. April 2012
ACI EUROPE has long argued that any revision of the existing EU Directive on ground handling should empower airports to set minimum service-levels for ground handlers and better control over the activities within the airport perimeter.

At present, the Airport Package contains legislative proposals on airport slots and capacity, ground handling and aviation noise. According to the rumour mill in Brussels, the Airport Package is due for adoption by the European Commission on 30 November, just as this issue of Airport Business is being distributed.

Given that the Airport Package will set the direction and priorities of a significant portion of European airport policy for the years to come, ACI EUROPE has closely followed the work undertaken by DG MOVE and consulted with them at regular intervals.

Here is a breakdown of what to expect:

**Airport slots & capacity**

The existing regulation on the use of airport slots has been scheduled for review for some time. The current regulation primarily benefits the legacy airlines that enjoy ‘grandfather’ rights over slots at some of Europe’s busiest airports. At present, those airlines enjoy the flexibility of the current 80/20 slots usage rule and the sometimes unofficial, but acknowledged presence of secondary trading of airport slots between airlines (with zero benefit going to the airport).

With a broader field of airlines hungry for airport slots and the increasing urgency of resolving the issue of airport capacity in Europe,

Early this year, EC Vice President in charge of Transport Siim Kallas, announced that he would release an ‘Airport Package’ of regulatory measures concerning airports in the EU. ACI EUROPE has been tracking this development with keen interest since the announcement and all is due to be revealed before the end of the year. Robert O’Meara reports.

**Prelude to the Airport Package: What’s In The Box?**

With a broader field of airlines hungry for airport slots and the increasing urgency of resolving the issue of airport capacity in Europe, the revision of the regulation is of keen interest to both airports and airlines.
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EC Vice-President Kallas has also announced that better use of airport slots could help optimise existing airport capacity to the tune of about 28 million passengers. That figure is theoretical and the means to achieving it is also contested by some airlines. For its part, ACI EUROPE supports any measure that will lead to better use of existing airport capacity.

However, even if the full figure of 28 million passengers in additional capacity does materialise, there is no escaping the simple truth that Europe will need to build more airport infrastructure if it is going to accommodate the near doubling in air traffic, that EUROCONTROL predicts will occur by 2030. For this reason, ACI EUROPE has also been underlining the need for the Airport Package to contain a strong reference to the urgent need for more airport capacity in Europe, if we are to remain properly connected to the rest of the world.

Not only that, but given that the Single European Sky aims to triple airspace capacity, ACI EUROPE argues that the priority of matching airport capacity on the ground should be central to Vice-President Kallas’ vision for the Airport Package.

Olivier Jankovec, Director General ACI EUROPE says: “We have repeatedly told Vice-President Kallas and representatives of DG MOVE that bundling these new legislative proposals together into the Airport Package should not simply be an exercise in boosting visibility. This is the opportunity for a genuine vision on how Europe’s airports can best serve the connectivity of our continent, for the long term. There is a burning unresolved issue to be addressed. Without matching airport capacity, the Single European Sky will not realise its potential and ultimately fail to deliver much of the promised benefits. The Airport Package cannot simply ignore that.’’

Ground handling

Ground handling was one of the sore points of last year’s extreme winter conditions and the operational complications which occurred at some airports, in particular concerning aircraft de-icing fluid.

ACI EUROPE has long argued that any revision of the existing EU Directive on ground handling should empower airports to set minimum service-levels for ground handlers and better control over the activities within the airport perimeter. This point may finally be resolved in the ground handling part of the Airport Package. However, there is also talk of a proposed further liberalisation of ground handling services in Europe. Together with Europe’s airports, the European Association of Independent Ground Handlers and the Unions have, within the framework of the Social Dialogue, already denounced the dangers inherent to any further liberalisation. Indeed, following a first round of liberalisation in the late 1990s, the ground handling market has become extremely competitive, with a significant price reduction, but to the detriment of social conditions and quality of service. As a result, airport operators now only account for 16% of the market, leaving the rest to independent handlers and airlines.

ACI EUROPE has made it known that it does not support any further liberalisation, as it would only put jobs at risk, potentially prompting industrial action, precisely at a time when Europe’s jobless recovery now faces a double dip recession. Moreover, it would also negatively impact the performance and quality of ground operations, with potential consequences on safety and security levels.

Aviation noise

On the matter of aviation noise, this part of the Airport Package will potentially see a revision of the EU Directive on Noise Management. While ACI EUROPE has already pledged support for Vice-President Kallas’ proposal to reinforce and clarify the ICAO ‘Balanced approach’ to noise restrictions, concerns remain about the reaction in the European Parliament and at national level in EU Member States.

For the full picture on the Airport Package and its various implications, all will apparently be revealed at the end of November. After that, the legislative proposals will have to make their way through the EU regulatory machine, namely in the hands of the European Parliament and Council of the European Union. Expect a full update in the Spring 2012 issue of Airport Business.

Given that the Single European Sky aims to triple airspace capacity, ACI EUROPE argues that the priority of matching airport capacity on the ground should be central to Vice-President Kallas’ vision for the Airport Package.

While ACI EUROPE has already pledged support for Vice-President Kallas’ proposal to reinforce and clarify the ICAO ‘Balanced approach’ to noise restrictions, concerns remain about the reaction in the European Parliament and at national level in EU Member States.
EU AND RUSSIA — IS LIBERALISATION FINALLY WITHIN REACH?

An EU-Russia Action Plan proposed in 2006 promised cooperation on safety, security and training, a generic commitment to liberalisation of market access as well as access for Russian aviation to EBRD (European Bank for Reconstruction and Development) and EIB (European Investment Bank) financing facilities. However, some unresolved issues, including the EU designation clause and Siberian over-flight issue, have prevented its implementation. The recent EU-Russia Aviation Summit was the opportunity to renew the motivation for closer relations. Robert O’Meara & Ross Falconer report.

The EU-Russia Aviation Summit was jointly organised by the European Commission and the Russian Ministry of Transport and took place in St Petersburg on 12 and 13 October. Naturally, the aim was to enhance political, technical and industrial cooperation in the aviation industry and review the possibilities for aviation liberalisation between Russia and the EU.
of air transport; business opportunities in the aeronautical industry; airport policy, infrastructure and investment.

High level representatives from both sides attended, including Siim Kallas, European Commission Vice-President responsible for Transport; Cezary Grabarczyk, Minister of Infrastructure of Poland, representing the Presidency of the Council of the EU; and Igor Levitin, Minister for Transport of the Russian Federation. Kallas commented “The EU and Russia have so much to gain from closer cooperation in the aviation sector, both in relation to safety, industrial cooperation, air traffic management, sustainable growth and investment.”

‘Time to normalise’

Representing the airports, in both the EU and Russia, ACI EUROPE Director General Olivier Jankovec delivered a presentation on ‘Normalising air transport & unleashing the power of airports’. In a wide-ranging address, he expanded on the European experience of aviation liberalisation and the immense benefits it has brought and can bring, if further liberalisation occurs.

Reiterating the key points of ACI EUROPE’s recently released analysis paper ‘Expanding Europe’s Aviation Market: Prerequisite for Global Relevance’, the ACI EUROPE ‘Road Map’ calls for extending the European Common Aviation Area and reaching out to the EU’s main trading partners. This includes creating a Pan-European/ Mediterranean Aviation Area, which is important to achieving the aim of completing the European Common Aviation Area of 58 countries and one billion inhabitants by 2020. Jankovec also stressed the need to kick start negotiations with the EU’s main trading partners in emerging markets – the BRIC (Brazil, Russia, India, China) and ASEAN (Association of South East Asian Nations) countries.

Highlighting the lack of progress of the EU-Russia Action Plan proposed in 2006, Jankovec grasped the nettle of the unresolved issues, namely the EU designation clause in Bilateral Air Services Agreements in force between Russia and individual EU Member States (such a clause needs to replace existing national clauses so as to allow any EU airlines to access the Russian market from any EU Member States) and the Siberian over-flight issue. Another particularly pertinent point raised by ACI EUROPE was the difficulties in doing business in Russia. Citing the example of Russia recently adding visa restrictions on airline crews which do not leave the airport terminal, Jankovec denounced this practise, as it impacts on airport operations, causing significant delays. In the run-up to the Summit, ACI EUROPE formally raised this issue in a letter to Vice-President Kallas and also after the Summit in a letter to European Commissioner for Home Affairs, Cecilia Malmström. Since then, ACI EUROPE has received confirmation that the issue has been resolved within the EU-Russia negotiations for a new visa regime.

Laurent Muschel – member of the Cabinet of Cecilia Malmström, told Airport Business “Commissioner Malmström immediately raised the issue with the Russian authorities, at the highest level, and we are very pleased that it has been quickly resolved. In order to ensure that it does not happen again, it is important that the EU and the Russian Federation conclude an agreement on a legally binding reciprocal visa waiver for civilian air crew members. Such a visa waiver should be introduced into the revised EU-Russia Visa Facilitation Agreement, which is currently under negotiation.”

On the Community airline designation clause, there are also some signs of hope. The recent agreement with Finland sees Russia for the first time accept the principle of EU designation. The Siberian over-flight issue also leads on from the Bilateral Agreements. They force EU carriers to sign commercial agreements with competitor Aeroflot, which then dictates what EU airlines have to pay for overflying Siberia to Far East destinations – currently around €320 million a year. Russia is the only country in the world where such over-flights payments have to be made. As Jankovec put it in his presentation “It is high time to normalise aviation relations between the EU and Russia”.

While the Russian side reiterated that the Siberian over-flight payment would stop upon Russia’s accession to the WTO, it remains to be seen whether that commitment will be translated into action now that such accession has been formalised.

Air service agreements

Offering an airline perspective on the EU-Russia aviation market, Prof. Dr. Regula Dettling-Ott, Vice President EU-Affairs, Lufthansa, who also attended the Summit,
explained that for the Lufthansa Group, the ties with Russia are of utmost importance. It has served the Russian market for 39 years. Lufthansa itself operates 147 weekly flights to eight Russian destinations, while, in total, the airlines within the Lufthansa Group operate 235 weekly flights to 10 Russian destinations. In 2010, the Lufthansa Group carried two million passengers between the EU and Russia. Cargo traffic is also important – Lufthansa flies to eight destinations, carrying 5,700 tonnes of cargo to Russia and 2,300 tonnes from Russia. “From the point of view of Lufthansa, Russia is a natural partner for Europe. Business ties and tourism between the two have increased and will further grow in the future. Russian infrastructure has gained admirably both in terms of quality and quality. This will allow the industry to grow further, both for Russian and foreign carriers,” said Dettling-Ott. “Lufthansa welcomes the fact that Russian authorities have agreed to find a new basis for air service agreements and to negotiate a solution for the Russian over-flight issue. In order to maintain the competitiveness of European and Russian aviation in a fiercely competitive global industry, such improvements are essential, as for both LH passenger airlines and LH-Cargo, Russia is an important partner to operate flights to Asia.”

Niky Terzakis, Managing Director, TNT Airways, meanwhile, provided a market outlook for EU-Russia cargo traffic. He explained that world air cargo traffic will triple over the next 20 years, and forecast that cargo tonnage carried between Europe and the CIS would grow at an average annual rate of 5% between 2009 and 2029, while in the opposite direction, between the CIS and Europe, it would grow by 6.5% per year. Looking at the challenges facing the industry, Terzakis said: “Service levels are compromised due to operational differences driven by lack of liberalisation and regulatory convergence. This presents us the opportunity to evolve the global regulatory model in a way that allows appropriate action to be taken to address vulnerabilities as they manifest themselves and to tackle threats as they evolve,” explained Baldwin. The creation of a One Stop Security area in the EU is one of the main benefits that a system based on common aviation security rules can deliver. It means that re-screening of passengers, baggage and cargo is not necessary on transferring at an airport by virtue of the security controls having been applied at the airport of origin and the integrity of the screened passengers, baggage and cargo is guaranteed since. “The possibility not to re-screen transfer passengers travelling within the EU permits a more efficient use of limited resources and facilitates the flow of passengers, baggage and cargo. It is smart security,” commented Baldwin. “What’s more, the application of One Stop Security is not limited to the external borders of the EU. The EU framework permits the equivalency of security measures applied by non-EU countries to be recognised and, to-date, One Stop Security expands to Iceland, Norway and Switzerland. Outside Europe, One Stop Security arrangements have been concluded with the United States for passengers arriving on flights from America into Europe.”

Visible progress
The European Commission considers the Summit to have been a success, as it provided a forum to discuss important issues such as the legal conformity of bilateral air transport agreements, Siberian over-flight charges and sustainable air transport, as well as cooperation in air traffic management and aviation safety and security. There was consensus regarding huge potential benefits for both sides of wider cooperation between the EU and Russia in the aviation sector. Filippa Burghelle-Vernet, Head of Internal Market, Air Transport Agreements & Multilateral Relations, European Commission, commented “As regards matters of special interest for the EU side, Russia accepted shortly before the Aviation Summit to change its bilateral agreement with one EU Member State to be in line with EU law (in particular including the EU carrier concept). It is expected, as Russia also announced at the Summit, that bilateral agreements with other EU Member States will, without delay, be adapted accordingly. Furthermore, a solution to the Siberian over-flights issue is expected now that Russia has become a Member of WTO. If these promising signs and expectations deliver results thanks to the momentum gained from the Summit, they might indeed be viewed as ‘green shoots’ for proper liberalisation between the EU and Russia.

Reiterating the key points of ACI EUROPE’s recently released analysis paper ‘Expanding Europe’s Aviation Market: Prerequisite for Global Relevance’, the ACI EUROPE ‘Road Map’ calls for extending the European Common Aviation Area and reaching out to the EU’s main trading partners.
Best known for its leading role as an aircraft manufacturer, Airbus is now placing increased attention on improving airport services on a broader basis and is currently developing a concept that could change the face of baggage handling as we know it.

**AIRBUS AIMS TO REVOLUTIONISE BAGGAGE HANDLING**

More than 40 years of industry experience is now being applied by Airbus to improving airport and baggage services. “Previously, we’ve used this experience for our own aircraft development, but now we think it’s time to offer it to others and we see more and more potential to penetrate the services market,” explained Bruno Gutteres, director business development, head of Airbus Business Nursery, Strategy & Future Programmes, Airbus. “It’s great to improve everything that happens when the aircraft is in the air, but if there are still bottlenecks on the ground, all of these benefits are lost.”

This mentality has led Airbus to develop a unique baggage handling concept. In 2010, baggage handling cost the industry as much as $20 billion (£14.88 billion), with $2.5 billion (£1.86 billion) of this coming from misplaced baggage. M. Gutteres said: “The concept of baggage handling in the airport itself doesn’t change. All of the new technology we have seen introduced step-by-step tends to be very expensive to maintain but shows no real improvement to the end result. It’s time to find another way to handle the baggage and this is what the Squarcle Bag System does.”

**Increasing efficiency, reducing costs**

This system has been developed by the Airbus Business Nursery and provides an innovative solution to increasing the efficiency and reducing the costs related to baggage handling. Once the passenger has checked-in, they pass through the security process still in possession of their bag and once it has been screened and declared safe, the bag is placed directly into a container. This container then automatically locks and is loaded directly onto the aircraft, minimising the need for any further manual handling of the baggage. An RFID (Radio Frequency Identification) tag is also attached to each bag to allow it to be tracked throughout the journey.

“For the airline, there is less manual handling and for airports no complex system to invest in and to maintain. Less handling also means a higher level of security,” M. Gutteres continued.

“For the passenger, they have a guarantee that their baggage has been loaded. Also, as the bag is already in the container, it will not be damaged during the handling process.” With the development of the system nearing completion, Airbus is planning to demonstrate the Squarcle Bag System to airlines, airports and operators from early 2012 and M. Gutteres explained that “some airlines and airports have already expressed an interest” while “the French authorities have also shown support for the system”.

“The idea now is to implement a pilot in a real airport with a real commercial airline and this is something that we’re hoping to undertake in the final quarter of 2012,” he concluded.

M. Gutteres: “It’s great to improve everything that happens when the aircraft is in the air, but if there are still bottlenecks on the ground, all of these benefits are lost.”
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Aviation security policy, in particular airport security continues to be THE subject that has changed passenger perception of air travel. 2011 has been a banner year with legislation recently adopted for the inclusion of Security Scanners as an alternative means of screening; studies on the implications of full removal of liquids, aerosols and gels (LAGs) restrictions in 2013 and a High Level Conference on ‘Protecting Civil Aviation Against Terrorism’ which took place in Brussels on 27 September. Ross Falconer & Robert O’Meara report.

The most talked about subject in relation to airport security – the restrictions on liquids, aerosols and gels – has been in place since November 2006, following the discovery in August of that year of a terrorist plot involving liquid explosives to be used on transatlantic flights departing the UK. Regular airport users and Airport Business readers will know that liquids may only be carried airside in individual containers no larger than 100ml, with all containers fitting in a transparent, re-sealable bag. Travellers arriving in the EU from non-EU country airport and transferring to another flight, unless arriving from an approved airport – those with ‘third country recognition’ – are not allowed to carry LAGs exceeding 100ml on board their next flight, including duty free purchases sealed in secure tamper-evident bags (STEBs).

As previously detailed in these pages, the restrictions were to be removed in a two-phase process, with 29 April 2011 the initial deadline for the easing of LAGs restrictions for transfer passengers, with the second phase rolling out in April 2013. That first phase was intended to allow the carriage of LAGs purchased at non-EU airports by passengers transferring at European airports within 36 hours of purchase. However, the first phase failed to materialize because a significant number of Member States decided to retain the ban on LAGs from third countries, and the US stated that it would impose extra screening requirements on any flights bound for US destinations. The lack of agreement between the US and the EU coupled with the potential confusion of patchy implementation across Europe had the potential to cause even more confusion for passengers. As a result, the European Commission adopted revised legislation (Regulation (EC) 720/2011) removing the first phase completely and aiming for the full removal of the current restrictions in April 2013. The Regulation now states that the European Commission will work closely with all parties concerned and will assess the situation in respect of the screening of LAGs by July 2012.

The industry position, ever since the introduction of the ban on LAGs, has been to support the efforts of the European Commission in order to allow the smooth return towards the situation that existed before summer 2006. However, ACI EUROPE has always based its support of the European Commission on two fundamental premises: security and facilitation. Any removal of the ban should be based on a sustainable technological solution that ensures a high degree of probability of detection of a wide range of liquid explosives. From a facilitation point of view, ACI EUROPE believes that any solution that allows the removal of the current ban should be passenger friendly and, therefore, enhance the passenger experience.

ACI EUROPE Director General Olivier Jankovec addressed the High Level Conference on aviation security – ‘Protecting Civil Aviation Against Terrorism’ hosted by the European Commission and the Polish Presidency of the EU.
rather than complicate it any further.

ACI EUROPE is studying the implications of the removal of the ban in 2013 and it is coordinating the operational trials between EU Member States, airports and manufacturers across Europe. It has provided significant information on the operational and practical issues surrounding LAGS screening. For example, ACI EUROPE has raised concerns about the international situation, along with practical issues of tender and procurement procedures, and has stated that a decision regarding going ahead with the 2013 deadline needs to be made as early as possible in 2012.

**Security Scanners**

The other part of the airport security equation is Security Scanners, which have been in the news a lot these past months, in particular in relation to the US position on them. Here in Europe, there has been some positive progress on this.

A European Commission amending legislative proposal to include security scanners as an alternative means of screening was voted on by the Civil Aviation Security Regulatory Committee on 6 July. The amending legislation passed scrutiny by the European Parliament and Member States on 16 October. It was adopted on 11 and 12 November and should enter into force on 1 and 2 December. The key points in the amending legislation are:

- Backscatter ionising radiation security scanners are not allowed, except as part of an authorised trial;
- Passengers are entitled to opt out and be searched by an alternative method;
- Security scanners should move towards the use of automatic threat detection (ATD) to obviate the need for human screeners; and
- The use of security scanners is not mandatory.

Security Scanners are already in place at Amsterdam Airport Schiphol and Manchester Airport (under trial), while a number of other airports are also exploring the possibility of investing in this technology.

**High Level Conference**

The Polish Presidency of the EU (running from 1 July to 31 December this year) has been particularly active on transport. In the weeks following the 10th anniversary of the 9/11 Terrorist Attacks and in partnership with the European Commission, it hosted a High Level Conference on aviation security – ‘Protecting Civil Aviation Against Terrorism’ – in Brussels on 27 September. The event brought together more than 100 government representatives and industry stakeholders, including ACI EUROPE, AEA, ECAC, IATA, ICAO and the US Transportation Security Administration, to discuss developments in aviation security over the past decade.

In her opening remarks, Ambassador Beata Peksa-Krawiec, Polish representative to the EU’s Political and Security Committee, set the scene: “The terrorists continuously consider passenger and cargo aircraft as a weapon of choice. The persistent threat was confirmed by events such as the 2006 plot to defeat security check point screening using liquid explosives, the use of non-metallic IED components concealed in the terrorist’s underwear on Christmas Day 2009, or the attempt to ship two explosive packages in cargo by concealing them in printer cartridges in October 2010. Common danger needs common solutions and an integrated approach.”

Matthias Ruete, Director General of the European Commission’s DG MOVE, followed with a keynote address, in which he said that “In civil aviation, Europe now has a robust and comprehensive security regime. It has shown its ability to respond to new threats, such as improvised liquid explosives in 2006; and to adapt to technological developments, such as security scanners – with a recent legal proposal to allow their use at EU airports.”

Ruke also emphasised that no State is able to tackle terrorism alone and that “international cooperation is crucial for successfully combating terrorism and for keeping aviation running smoothly.”

The conference sessions focused on ‘A global perspective to civil aviation security’, ‘Risk assessment in the EU, and ‘Agenda for the future: Balancing facilitation and aviation security’. ACI EUROPE Director General Olivier Jankovec participated in this third session, where he outlined the basic concepts underlying the joint ACI EUROPE and Association of European Airlines Better Security risk-based security project.

It was widely agreed that, 10 years on from 9/11, civil aviation is protected by a robust security regime. However, while, statistically, the posed to aviation remains relatively small, air travel continues to be an attractive, high visibility target for international terrorism. The conference participants discussed how to develop aviation security policy further, in order to efficiently address the evolving threat.

Participants agreed that the development of a common European risk assessment for cargo and mail security has been positive. Security measures can and should relate to the risk they intend to mitigate. If a high quality risk assessment is available, security resources can be targeted to where the risk is greater.

There was also agreement on the need for more efficient controls. Targeting controls on the basis of risk was considered one way of improving efficiency and the European Commission was invited to coordinate expert work examining this and other avenues for the future security model, involving regulators and stakeholders. The consensus was that more unpredictable measures should be considered in more areas of the security process.

Technological progress serves both security and facilitation. Reference was made to security scanners and the legislative proposal to allow their use at EU airports, improvements to liquid explosives detection systems, and biometric identification technologies. The conference concluded that the EU should continue to support initiatives aimed at developing new technology, particularly high-speed detection systems and those that allow a smoother throughput of passengers, baggage and cargo.

However, beyond the operational aspects and the technological progress, the fact remains that aviation is global, and so too is the threat. A proactive international agenda is, therefore, essential. Participants at the EU conference agreed on the need for robust global rules, through ICAO, to effectively address current threats.

With this in mind, ICAO’s own High Level Conference on Aviation Security is set to take place in September 2012. It should provide a welcome opportunity to move forward.
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A UNIFIED TRANSPORT NETWORK: EUROPEAN COMMISSION PROPOSES REVISION OF TEN-T GUIDELINES

On 19 October, the European Commission adopted a proposal to transform the existing patchwork of European roads, railways, airports and canals into a new Trans-European Transport Network (TEN-T). The new policy follows a major two-year consultation involving Member States, regions and stakeholders, and establishes a Core Transport Network to be established by 2030. Ross Falconer reports.

The TEN-T policy exists to put in place the transport infrastructure and interconnections to underpin the Single Market. It is designed to support growth, jobs and EU competitiveness. Since the 1980s, TEN-T policy has focused EU money on supporting the development of key European infrastructure projects.

The new TEN-T network consists of two layers – a Core Network to be completed by 2030 and a Comprehensive Network feeding into that, to be completed by 2050. The Comprehensive Network will ensure full coverage of the EU and accessibility of all regions. Meanwhile, the Core Network will prioritise the most important links and nodes of the TEN-T, to be fully functional by 2030. Both layers include all transport modes.

Siim Kallas, European Commission Vice-President Responsible for Transport, said: “Transport is fundamental to an efficient EU economy, but vital connections are currently missing. Europe’s railways have to use 7 different gauge sizes and only 20 of our major airports and 35 of our major ports are directly connected to the rail network. Without good connections Europe will not grow or prosper.”

He added: “There are 82 airports on the new Core European Transport Network (TEN-T core network) published last month. There is an obligation for 37 of those airports to be connected to rail (national rail network). The numbers speak for themselves. They send a very clear signal about the high political importance given to airports in the future European transport infrastructure.”

TEN-T is also an important tool to ensure full coverage of the EU and accessibility of all regions. Meanwhile, the Core Network will prioritise the most important links and nodes of the TEN-T, to be fully functional by 2030. Both layers include all transport modes.

Core Network – the funding

Financing proposals were also published for the period from 2014 to 2020, with an emphasis on filling in cross-border missing links, removing bottlenecks and making the network smarter. The core TEN-T network will be supported by a Comprehensive Network of routes, feeding into the Core Network at regional and national level. This will largely be financed by Member States, with some EU transport and regional funding possibilities.

“Taken as a whole, this programme will bring together some €200-250 billion of spending. The bulk of that infrastructure spending is foreseen and will be financed by national governments. An additional €31.7 billion will come from the Connecting Europe Fund. That money and an overall EU framework means that instead of fragmented national projects, projects will join up to form a coherent whole,” explained Kallas. “It all adds up to a joined up network which will deliver efficiency savings for Europe’s businesses of over €300 billion by 2030.”

Transport is fundamental to an efficient European economy, and the new Core Network will remove bottlenecks, upgrade infrastructure and streamline cross border transport operations for passengers and businesses throughout the EU. It will also improve connections between different modes of transport, while contributing to the EU’s climate change objectives.
ACI EUROPE INVITES ALL AVIATION INDUSTRY PLAYERS TO THE FOLLOWING INDUSTRY EVENTS

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WORLD BUSINESS PARTNERS & AIRPORTS: ENGAGING FOR MUTUAL BENEFIT

The ACI World Business Partner (WBP) programme was rebooted at the beginning of 2010, with coordination moving from ACI WORLD to each of the ACI regions. ACI EUROPE has made gains in reconnecting with former WBPs and broadening the membership of the programme, all the while seeking to improve the value it offers members. Donagh Cagney & Ross Falconer report.

If there was ever an industry in which ‘no man is an island’, then aviation is most surely it. Success within the industry, be it in day-to-day operations or longer-term financial objectives, is heavily dependent upon cooperation and information exchange between all players in the industry. Airport suppliers are no exception to this, and the most dynamic of these realise that they have an important and active role to play at the very heart of the industry. The ACI WBP programme is run with this ideal in mind.

Active involvement in the airport industry

Here in Europe, the programme currently has 157 members, and has been tailored to be of value to airport suppliers from all backgrounds, with membership from a wide range of different airport-related disciplines – see chart. And in keeping with this approach, the WBP programme is also structured so as to allow airport suppliers the level of involvement that best suits their business needs, offering a choice of ‘Gold’ and ‘Silver’ memberships.

Reflecting the ethos of the programme, Gold membership entitles WBPs to join and actively participate in ACI EUROPE’s five specialised committees. These committees cover a wide range of areas – Economics, Environment, Security, Facilitation & Customer Service, and Technical & Operational Safety – and so all WBP members should find a committee of interest directly related to their business. To ensure that WBPs are fully involved, 2 slots on the agenda are always reserved for WBP presentations. And of course, alongside the committees’ formal order of business, WBP...
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participation provides unparalleled networking opportunities. The 5 ACI EUROPE committees are regularly attended by a core group of more than 200 senior level personnel from a range of European airports, both big and small.

Dr Padraig Dixon, Senior Consultant at Oxera Consulting, and member of the Economics Committee, recently returned from Lisbon, Portugal where he partook in the committee meeting, spoke about his experience: “We’ve been involved in the Economics Committee for some time now,” he reflected, “and our reasons for participating are as relevant as they’ve ever been. In our business the only way you can really add value is if you truly understand the core industry issues, not to mention the people dealing with these issues. And the best way of gaining that understanding is by getting actively involved through these kind of opportunities.”

Lorenzo Belicchi, Airport Sales Director at SiTa, led a workshop on IT Trends at the Regional Airports’ Conference & Exhibition in Cagliari, Italy. Speaking about his motivations for doing so, he said “These conferences bring senior decision makers together from across Europe. While attendance at these events is a good start, active participation is just as important. There needs to be a two-way conversation between you and your clients, and you need to be proactive to make sure this happens.”

However, the chance to actively engage with senior airport management is not limited just to committee meetings. All WBP members, both Gold and Silver, are entitled to apply to join ACI EUROPE’s Commercial Forum, which concentrates on the generation of non-aeronautical revenues, and the Regional Airports’ Forum, which addresses the specific needs of European airports with traffic of less than 5m passengers per annum. WBP members are also encouraged to engage with airports in ACI EUROPE’s schedule of conferences and exhibitions, with a suite of preferential treatments. Perks include priority consideration for speaking and sponsorship opportunities, advance information on events (including delegate lists), a dedicated WBP meeting during the ACI EUROPE Annual Assembly and Congress, and more.

A two-way flow of information
Aviation is a non-stop business, and so WBP members’ involvement with airports cannot be limited to committee meetings and conferences. To this end ACI EUROPE’s experienced and knowledgeable personnel keep the channels of communication open, acting as effective industry contact and reference points for all WBPs. And in line with the WBP programme’s ethos of active participation, WBPs can also share their own information and messages, either with ACI EUROPE’s wider membership base, or targeted purely to airports.

And since the best engagement is informed engagement, the WBP programme is also reinforced by a wide stream of industry information and insight. WBP members are automatically entitled to ACI EUROPE’s range of publications, including a daily news roundup, a bi-monthly internal newsletter ‘Taxi Lights’ and copies of this quarterly magazine. This is all backed up by the newly revamped ACI EUROPE website, with exclusive access for WBPs to the Members’ Room, which hosts a range of additional information, including detailed monthly airport traffic data and all committee presentations and documentation. The two-way relationship is also replicated online, with an active LinkedIn discussion group where all are encouraged to join the conversation.

Active involvement in the ACI EUROPE World Business Partners programme helps build strong and mutually-beneficial relationships between members and European airports, and as such represents a unique opportunity for airport suppliers.

For more information, and for a full list of membership benefits, please visit http://www.aci-europe.org/membership/world-business-partners.html

Dr Padraig Dixon, Senior Consultant at Oxera Consulting, and member of the Economics Committee: “In our business the only way you can really add value is if you truly understand the core industry issues, not to mention the people dealing with these issues. And the best way of gaining that understanding is by getting actively involved through these kind of opportunities.”
COLLIER TO JOIN LCY; REMAINS ACI EUROPE PRESIDENT

It has been announced that ACI EUROPE President Declan Collier is to leave his position as CEO of Dublin Airport Authority (DAA) and take up a new role as Chief Executive of London City Airport in early 2012. He informed the DAA Board that he would not seek to renew his current contract, which expires in early April 2012.

Collier has been in his role at the DAA since April 2005. His tenure has seen the successful delivery of the €1.2 billion capital investment programme at Dublin Airport, including the opening of the flagship new Terminal 2 last year, which has significantly improved the customer experience. He has also overseen implementation of an innovative non-aeronautical revenues strategy.

“I consider myself very fortunate to have had the opportunity of working at DAA during such an exciting and challenging time in its development and with such committed Board members, management and staff,” said Collier. “Despite the current difficult economic environment, I know that by delivering the facilities required for future growth and by rigorously managing its costs, DAA has a bright future ahead and I wish it every success.”

He added: “I am really looking forward to my new role at London City, and to playing my part in the future growth and development of the airport following the great work carried out by Richard Gooding (current CEO) and his team.”

Collier will remain ACI EUROPE President for the full term of office, in accordance with the terms of Board membership and Presidency as per the ACI EUROPE Statutes.

WATER MANAGEMENT WORKSHOP

The management and treatment of water within the environments of airports remains an important topic, and one that is of particular concern to the communities within which individual airports operate. In light of this, ACI EUROPE organised a free workshop on the subject at its Brussels headquarters on 15 September. The workshop addressed both the issue of water quality and the fact that water is a scarce resource.

The morning session included a presentation from Jacques Delsalle, DG Environment – Unit Protection of Water Resources, entitled ‘A blueprint for safeguarding European waters’. Sabine von Wran-Lehr of the European Water Partnership followed with a focus on ‘Water stewardship in Europe’. COFELY Airport Services’ Piet de Grauw, Business Development Manager, and André Bailleul, Operations Manager, then delivered a presentation on ‘A technical solution to improve water efficiency at airports’.

A series of airport case studies followed in the afternoon from Brussels Airport’s Christel Vandenhouten on ‘Water efficiency’, Budapest Airport’s Gábor Szarvas on ‘Water quality at airports’, Swedavia’s Lena Wennberg on ‘A comprehensive water management policy’, and Dublin Airport Authority’s Martin Doherty on ‘What response to a water crisis?’

For more information, please contact Chrystelle Damar, ACI EUROPE’s Environmental Strategy & Intermodality Manager: chrystelle.damar@aci-europe.org.
Making use of the latest in biometric technology and self-service, the new South Terminal Security product at London Gatwick Airport provides an insight into next generation airport security. **Ryan Ghee** reports.

**LONDON GATWICK’S FUTURISTIC SECURITY PRODUCT**

The £45 million investment in redeveloping the security search area in London Gatwick’s South Terminal came with a promise of ensuring that every passenger will be processed through security in no more than five minutes.

Comprising 19 lanes – 15 standard lanes, two for passengers who require assistance and two for premium passengers – the new product allows for 5,000 passengers to be processed per hour – a 25% increase in efficiency. “The old security product was spread across three locations on two floors, so we’ve created a new single security area,” said Geoff Williams, Head of Security, Gatwick Airport. “An interesting statistic is that every second, a passenger will be leaving the security area and entering the departure lounge. The idea of passengers queuing for no more than five minutes fits in with our motto: ‘We hate queues’.”

An innovative aspect of the security product is the airport’s adoption of Iris at a Distance (IaaD) technology. The technology is known as MFlow Track and has been supplied by Human Recognition Systems in partnership with AOptix Technologies Inc. It is able to locate and capture the iris of the passenger, as opposed to the user having to stand in an exact location for the capture to be successfully completed.

**KNOWLEDGE AND FOCUS ON AVIATION SECURITY**

Securitas Aviation provides customised security services and solutions to airports, airlines, and airport-related customers. Through individual national companies, Securitas is present at over 150 airports in Europe, North America, Latin America and Asia with a workforce of about 20,000 staff. Its dedicated aviation and airport security employees are highly trained according to national, European and International regulations and receive specific training such as cargo security, dog security, documentation control, screening training and other task related training. The company’s aim is to raise awareness, to protect airport environments, airport staff and passengers.
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RAPISCAN’S AWARD-WINNING RTT

Rapiscan Systems is proud to announce that it has been awarded Best Innovator 2011/2012 for the Real Time Tomography (RTT) system at the UK Airport Operators Association Annual Conference. The RTT is a high speed, next generation baggage screening detection system that enables airports to automatically inspect checked passenger baggage for explosives and other potential threats. Enabling airports to screen up to 1,800 bags per hour with high-resolution 3D images, it provides faster and more accurate bag screening than all currently installed hold baggage handling systems. Rapiscan Systems will also be exhibiting at ACI Airport Exchange 2011, Abu Dhabi, 28-30 November, showcasing their Dual View Advanced Technology screening equipment. The 620DV is one of the most advanced checkpoint inspection systems in the world because it takes multiple views of a carry-on bag in the same time that it takes existing X-ray machines to show a single view, improving passenger throughput whilst also minimising hand searches by allowing cluttered bags to be cleared on screen. Rapiscan will also be providing an exclusive demonstration of the 3D images the award-winning RTT can provide to significantly improve the detection of potential threats.

Flexible design

Due to the ever-changing nature of airport security, Williams also explained that flexibility has been built into the new security product to ensure that London Gatwick is well positioned to react to any future developments. “Extra cabling and space has been built in should we need to adopt new technology in the future,” he said. “The security process will continue to evolve and we’ll be able to respond very rapidly.”

For the passenger, however, the focus is not on the long-term security plans, but on the product that is offered now and while the aim to process all passengers within five minutes may appear optimistic, at present, the average passenger travelling from London Gatwick completes the security process in less than two minutes.

PROVISION ATD ADVANCED IMAGING TECHNOLOGY

The TSA-approved ProVision ATD (Advanced Target Detection) quickly screens subjects to effectively reveal a broad range of concealed objects. These objects may be made of both metallic and non-metallic material, such as liquids, gels, plastics, metals, powders, very thin sheet explosives, bulk explosives and ceramics. After a passenger is scanned, advanced software processes the data directly. The system clearly shows the contours of passengers by displaying the letters “OK” on the operator’s LCD control panel. If a potential target is detected, an outline highlighting the area(s) of concern is placed on a generic mannequin that is displayed on the operator’s screen. Based on local regulatory requirements, the security staff can then perform a directed search to assess the situation.

ProVision ATD’s patented millimeter-wave sensing technology uses safe radio waves. ProVision ATD does not use ionising radiation, such as X-rays, and is tens of thousands of times less powerful than other commercial radio frequency devices, such as cell phones and wireless handsets. ProVision ATD’s millimeter-wave technology has been extensively evaluated by regulators worldwide including the U.S. Food and Drug Administration, Health Canada and the Dutch Institute of Applied Science (TNO) and found to be completely safe.

A quick two-second scan provides security personnel with data needed to confidently clear individuals through the security area, we have provided different services for families, PRMs (Passengers with Reduced Mobility) and others who might need some assistance, and we have created two special lanes just for those groups. This has also allowed us to speed up processing through the other lanes.”

completed, thus speeding up the process. All the passenger has to do is place their boarding pass on a reader and the gate opens within three seconds.

Colour coding and screens displaying actual queuing times have also been implemented to simplify the security process as far as possible. Williams said: “The idea is to make the whole process more welcoming. We’re giving people a choice and they are able to avoid the longest queues if they’re in a hurry. Not all travellers are the same.”

“Having listened to our passengers and watched their behaviour in the security area, we have provided different services for families, PRMs (Passengers with Reduced Mobility) and others who might need some assistance, and we have created two special lanes just for those groups. This has also allowed us to speed up processing through the other lanes.”

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**EMBRACING AUTOMATION TO ENHANCE CUSTOMER SERVICE**

With the adoption of self-service technologies in the airport environment consistently increasing, automation is fast becoming a vital part of the overall air travel process. Ryan Ghee discussed how automation is impacting on airport customer service levels with Catherine Mayer, vice president, SITA.

*The findings of SITA’s 8th Annual Airport IT Trends Survey state that 53% of airports are planning to increase the number of check-in kiosks available to passengers, while 25% plan to introduce kiosks for new services such as bag tag printing and self-scanning of documents.*

The increasing importance of self-service is aptly highlighted by SITA’s 8th Annual Airport IT Trends Survey, which was released in October. The survey, which is based on responses from airport operators representing the views of 198 airports and almost 50% of the global traffic, found that ‘improving customer service’ is the top driver for new technology investments in airports, with 63% considering this their highest priority.

The findings also state that 53% of airports are planning to increase the number of check-in kiosks available to passengers, while 25% plan to introduce kiosks for new services such as bag tag printing and self-scanning of documents. By 2014, 38% of airports will have introduced e-gates for self-boarding, 42% will have e-gates for checkpoints, and 51% will have introduced common-use bag drop locations.

“Automation, including additional self-service applications, will continue to grow in the airport environment simply because technology is the key enabler for a simplified, smooth travel journey,” explained Mayer. “For instance, in the recent SITA Passenger Self-Service Survey, we found that 70% of the passengers interviewed welcome self-boarding and 79% want more airline self-service options, including airport applications.”

This enthusiasm towards self-service from both airport operators and passengers has contributed to the rapid adoption of automated services and facilities throughout the air travel process, which has...
been driven by the many benefits that are offered.

“For the passenger, automation provides options, including control over their travel journey,” Mayer continued. “Whether the passenger wants to check-in via a mobile device, web or kiosk at the airport, or still meet with an agent at the ticket counter, technology has provided the choice. Automation also reduces the time required to perform many processes, including check-in, boarding, verification and access to areas.

“For the airport, automation helps to provide alternative ways to increase throughput without expensive capital investments or construction of new facilities; it helps to reduce congestion.”

Furthermore, Mayer also outlined that automation provides airports with important, accurate data and information, which can be shared in real-time, eliminating the need for manual entries and risk of human error.

Real-time data

Having access to real-time information is a vital component of the modern day airport and as well as allowing for increased levels of customer service, particularly through resource optimisation, it can also help to ensure safe and secure operations and achieve operational and business efficiencies.

Mayer added: “Business Intelligence solutions will also enable airports to remain flexible, optimise processes, and make timely decisions throughout all types of operations, even irregular operations.”

According to SITA’s survey, 76% of airports have plans to implement better real-time resource visibility and planning by 2014, and 71% of respondents said they would implement automated passenger monitoring in different areas of the airport to help reduce congestion and facilitate the integration of required data with multiple systems.

“Such collaborative solutions also enable airports to improve customer service by using the information to track service level agreements and key performance indicators,” Mayer said. “For instance, earlier this year, SITA and Copenhagen Airport announced the completion of an automated passenger monitoring pilot, which continues to operate today, providing actionable data to achieve greater operational efficiency and passenger satisfaction.”

Real-time information is a concept that is also central to SITA’s ‘Intelligent Airport’ vision. The Intelligent Airport is essentially an airport that has the ability to track, manage and share real-time information; optimise its processes and decision-making for all stakeholders; and enhance the passenger journey. According to Mayer: “The exciting thing about the Intelligent Airport is that components of it have already been adopted on a widespread basis.”

Smartphone-inspired automation

The ability to harness real-time information has also been aided by the rapid adoption of smartphones among passengers, allowing for new services such as Bluetooth-based passenger tracking, accurate queue measurement and mobile wayfinding. A report released earlier this year by market research firm Parks Associates stated that the number of global smartphone users is expected to increase from the 2010 level of 500 million, to 2 billion by 2015; something that will inevitably impact on the air travel sector.

Mayer said: “Smartphone technology is having the biggest impact on the travel process simply because customised information and activities are available to the user anytime, anywhere. The smartphone enables airports to provide additional passenger services that both augment and improve the journey through the airport.

“Smartphones are quickly becoming the communication and data device of choice for users in general,” she added, “so airports really have no choice but to continue to invest in these solutions to find new benefits.”

ARINC’s UNIQUE INSIGHT

ARINC has provided leading edge solutions to key airport development projects across the Middle East, including Dubai Airport T3/C2 and Cairo T3B – some of most technologically advanced and integrated airport implementations anywhere in the world. Its experience of these projects, and the current implementation of New Doha International Airport, has given the company unique insight into the evolution of airports across the region.

Whilst such developments will deliver the next generation of enhanced passenger experience, the utilisation of existing airport facilities must be maximised to ease the pressure until new and expanded amenities are completed. Those airports that are, understandably, reluctant to invest heavily in their older facilities can benefit from ARINC’s lower-cost hosted services in which IT applications are run on a remote central server that is linked to client workstations by a secure wide area network.

The vMUSE Enterprise passenger check-in service connects airport check-in agents to ARINC’s Global Processing Center, where they access a virtualised workstation. This enables airports to take advantage of the latest cloud computing technologies and achieve CUPPS compliance without the expense of investing in a whole new set of on-site infrastructure and the skilled staff required to maintain it.
“Every aircraft that’s been arrested has flown away.”
- Rick Marinelli, FAA Manager, Airport Engineering, Oct. 2010

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The project to upgrade Abu Dhabi International Airport’s Terminal 1 was completed in early November following 10 months of work. At the heart of the project was Abu Dhabi Airports Company’s (ADAC) desire to offer the best possible passenger experience and bring the facility in line with Terminal 3, which opened in 2009.

In total, the extension of the terminal has seen it expanded to cover an area of 23,000sqm, the number of check-in counters has been increased to 53, additional immigration counters have increased the total number to 16 in departures and 18 in arrivals, while three arrivals e-gates for automatic processing are in place. Each of these upgrades has contributed to an increase in the overall Terminal 1 capacity to 5 million annual passengers.

“At Abu Dhabi Airports Company, we are constantly striving to elevate the travel experience and ensure clients, whether passengers or airlines, enjoy a unique journey,” said Eng. Ahmed Al Haddabi, Chief Operating Officer, ADAC. “Driven from this ambition, T1 underwent a thorough and carefully designed upgrade plan to bring it in line with Terminal 3, and ensure that customers using any part of Abu Dhabi International Airport will have a refreshing and efficient start or end to their journey.”

As part of the refurbishment, the retail and food and beverage (F&B) facilities have also been subject to investment with new units added and the layout improved to enhance the journey for the passenger. Passengers now have a choice of 27 outlets, while the airport hotel and hospitality lounges have also been extensively renovated.

Elsewhere in the terminal, wayfinding has been improved, additional seating and improved air conditioning has been installed,

ADAC is currently considering bids from six consortia for the construction of the new Midfield Terminal Complex, which is due to go live in 2017.

**T1 REFURBISHMENT THE LATEST STAGE OF ADAC’S LONG-TERM VISION**

The latest investment in Abu Dhabi International Airport has seen the complete refurbishment of Terminal 1, extending capacity by 20% and significantly enhancing the passenger facilities. Ryan Ghee reports.
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while the lighting in the terminal has been enhanced. ADAC has also embraced self-service and Terminal 1 now includes 10 self-service check-in kiosks, in addition to the eight in Terminal 3, while offsite check-in is available in three locations: City Check-in at Abu Dhabi City, Expo Check-in at Abu Dhabi National Exhibition Centre, and self-service kiosks at Park Rotana Hotel.

Continuous growth
This upgrade to Terminal 1 – which has been in operation for almost 30 years – is part of the wider Capacity Enhancement Program 2012, which is ADAC’s interim solution to cater for the anticipated traffic growth in the Emirate and the region, whilst the new Midfield Terminal Complex is under construction. Once complete in 2017, the new terminal will offer a long-term solution to the rapid rate of growth, increasing the overall capacity to 27-30 million passengers.

The airport’s performance in Q3 2011 epitomises the positive passenger forecast for the region. Between July and September, 3.3 million passengers passed through Abu Dhabi International Airport – a 15% increase on the same period in 2010. For the first time in the airport’s history, passenger numbers surpassed 1 million for three consecutive months, with September traffic alone showing a 17.1% increase compared to September 2010. Cargo volumes presented equally positive results, with the three-month period showing an increase of 7%, and the month of September again the standout performer with a 10.8% rise.

Haddabi: “T1 underwent a thorough and carefully designed upgrade plan to bring it in line with Terminal 3, and ensure that customers using any part of Abu Dhabi International Airport will have a refreshing and efficient start or end to their journey.”
at Abu Dhabi International Airport are certainly a positive economic indicator for the UAE (United Arab Emirates) and the region,” Al Haddabi said. “It is especially encouraging that we are seeing sustained growth throughout the year. We are thrilled with the positive passenger activity results of the third quarter of this year and it is clear that both business and leisure travellers are choosing Abu Dhabi International more and more as their portal to the world.”

The year-to-date figures also make for positive reading for ADAC. In comparison to 2010, between January and September this year, passenger throughput increased by 13% overall to more than 9 million.

**Midfield Terminal Complex**

Following the completion of Terminal 3 in 2009 and the recently completed refurbishment of Terminal 1, the next stage of the ADAC master plan is focused on the construction of a brand new Midfield Terminal Complex, which is due to become operational in 2017.

This project is key to the airport’s long-term growth strategy and ADAC is currently considering bids from six consortia for the AED11.7 billion (£2.36 billion) project.

Al Habtoor-Murray & Roberts, Bechtel-Al Jaber, Hyundai Engineering & Construction-Kumho, Larsen & Toubro-NPC, Samsung-ACC and TAV-CCC have all submitted bids to construct the 700,000sqm terminal, on which construction work is expected to commence in Q2 2012.

The ongoing investment, along with the positive passenger and cargo growth forecasts and the continued expansion of home carrier Etihad Airways, highlight the significant potential of Abu Dhabi International Airport as a gateway to the Emirate of Abu Dhabi and the wider region. With the sharp rise in passenger traffic set to fulfil the existing capacity in the short-term, the addition of the Midfield Terminal Complex in just over five years time will be a key milestone in helping ADAC achieve its goal of establishing Abu Dhabi International Airport as a world-class global hub.

**VANDERLANDE’S PROVEN REPUTATION FOR BAGGAGE HANDLING SYSTEMS**

With a long-established local presence in the Middle East and surrounding countries and a track record of numerous successful projects, Vanderlande Industries has a proven reputation as a reliable partner for baggage handling solutions.

The partnership starts with the design and turnkey delivery of a state-of-the-art baggage handling system. But it also includes performance monitoring by smart software solutions, continuous support in identifying possible process or system improvements, and maintenance right through the life cycle, even including where necessary a 24/7 on-site presence.

This complete range of services and support forms the basis for the long-term relationships between Vanderlande and many airports throughout the region. Vanderlande Industries is also the only total OEM supplier (original equipment manufacturer), with its own design and manufacturing, and own software.

Recent baggage handling system projects have been successfully completed by Vanderlande in the Middle East region: Bahrain, Kuwait, Saudi Arabia, UAE, Yemen, Oman, Syria, Turkey, Iraq, Iran, Cyprus, Egypt, Tunisia, Algeria and Libya. And recently two major orders were received: The government of Oman awarded Vanderlande the contract to provide the baggage handling systems for both Muscat International and Salalah airports. Vanderlande Industries has also been awarded the contract to supply and install the baggage handling system for the new terminal at King Abdulaziz International Airport in Jeddah, Saudi Arabia.

Further strengthening its presence in the Middle East, Vanderlande opened a regional office in Dubai. From this office the company is able to offer a more rapid and direct response towards its customers in the region, and to extend its service capabilities at local level.
Bahrain Plans Major Capacity Expansion

A significant expansion project at Bahrain International Airport (BIA) will see its capacity increased by 50% to 13.5 million annual passengers. The project, which is currently at the design phase, is expected to be complete by 2015.

Khalid Al Rumaihi, Chairman, Bahrain Airport Company (BAC), said: “Bahrain International Airport is a vital component of Bahrain’s economy, with its strategic geographical location in the heart of the Gulf. The development will build on this historical position, transforming it into a vibrant platform for travellers and reinforcing the role it plays as a gateway to the world.

“We must ensure that BIA fulfils the potential and mandate set by Bahrain’s Economic Vision 2030, connecting our nation to the world and contributing to its socio-economic progress.”

The expansion will see the existing airport expanded by 40,000sqm, with as many as five new contact gates being added, as well as nine remote gates and 40 additional check-in counters. The expanded airport will also feature an enlarged transfer facility.

“The plans we are initiating for an expanded international airport are essential to Bahrain’s continued development, not only in providing businesses in Bahrain with the access they demand for the future, but also in bolstering the growing aviation and logistics industry in the Kingdom,” Al Rumaihi added.

“Furthermore, it will provide passengers with an improved experience and increase opportunities for BAC to generate revenue, which can then be reinvested in the airport.”

New KAIA Set for 2014 Opening

The first phase of the construction of the new King Abdulaziz International Airport (KAIA) in Jeddah, Saudi Arabia, is scheduled for completion in 2014. Construction of the airport commenced in 2006 and once it becomes operational, it will be able to cater for 30 million annual passengers, in comparison to the 13 million capacity currently offered by the existing airport.

At the heart of the new airport will be the state-of-the-art terminal facility, covering an area of 670,000sqm and operating as a domestic and international hub. It will also operate as a multi-modal hub, with a high-speed rail service to serve Makkah and Madinah currently under construction.

A new Air Traffic Control complex and tower, new taxiways, redeveloped airside and landside road networks, utilities networks, and service and support buildings are all also included in Phase One. The first phase of the Cargo Village and Airport City is also scheduled to be in place by 2014.

The development of the new KAIA also includes two further phases of development, which will be undertaken up to 2035 and will see overall capacity further increased to 70-80 million passengers.

Throughout the construction of the new airport, emphasis has been placed on environmental efficiency and a target is in place to achieve Leadership in Energy & Environmental Design (LEED) Silver status.
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As a key requirement of any airport development project, environmental efficiency is placed towards the very top of the agenda from the initial planning stages through to the day-to-day operation of the facilities. Ryan Ghee explores how the environmental considerations have been managed across three of Europe’s largest ongoing airport development projects.

The construction of the new Berlin Brandenburg Airport, the £1.2 billion (€1.4 billion) redevelopment of Gatwick Airport, and the investment in developing facilities at Frankfurt Airport currently represent three of the most significant industry projects in Europe.

While all of the projects are centred on enhancing facilities in order to provide more efficient operations and an improved customer experience, an environmental focus has been placed at the heart of each of them to both satisfy ‘green’ regulations and to set a benchmark for future developments.

Frankfurt Airport

At Frankfurt Airport, the environmental responsibility lies with the Sustainability Board and the Sustainability Working Group, which are responsible for ensuring that the environmental impact of the development and operation of the airport is minimised.

“Two years ago, Fraport undertook a reorganisation with the environmental division placed next to the social and economic divisions,” said Dr. Peter Marx, Head of Environmental Management, Sustainability Management Division, Fraport. “The idea was to link the sustainable principles throughout the company with the stakeholders and the critical partners.”

Earlier this year, Frankfurt Airport – the very first airport to become Airport Carbon Accredited after ACI EUROPE launched the programme in 2009 – achieved the ‘Reduction’ level of accreditation and is progressing well in its efforts to achieve the third level – ‘Optimisation’ – in 2012.

One of Fraport’s key targets is to reduce CO2 emissions per passenger and per 100kg of freight by 30% by 2020. To help achieve this, a 20% reduction in CO2 emissions for Terminal 1 is planned, the new Pier A-Plus will be an energy-optimised building, and the construction of Fire Station 4 has seen the introduction of Fraport’s first carbon neutral building.

London-Gatwick

The redevelopment of Gatwick Airport entails a multitude of various projects, ranging from the extension of the North Terminal and refurbishment of the South Terminal, to the redevelopment of the airfield, which

Heimberg: “Berlin Brandenburg Airport will be approximately 27% more efficient than required by law in 2007, when planning started.” (Photo: Günter Wicker)
includes the complete resurfacing of the runway.
As each of the projects have been ongoing, the airport has also this year become Airport Carbon Accredited at the ‘Reduction’ level, while it is the largest UK airport to have achieved both the Carbon Trust Standard and ISO 14001 accreditation.

Doug Waters, Best Practice Manager, Gatwick Airport, said “We are focusing on three key areas: energy, materials and waste. A lot of what we’re trying to do is understand how much energy is being used and, importantly, where. Every time we undertake a new project, we make sure we can get a better handle on the energy data as this then allows us to understand what energy levels we need to set for the new buildings and how and we can make savings.”

For each of the projects, the airport also undertakes a Sustainability Assessment Process, while a Sustainable Material Strategy has been developed to outline which materials the airport expects its construction suppliers to use.

**Berlin Brandenburg Airport**

Meanwhile, in Berlin, the construction of the German capital city’s brand new airport is nearing completion. It is currently the largest airport construction site in Europe but on 3 June 2012, the airport – which includes a six-storey, 280,000sqm terminal situated between two parallel runways – will become operational. Upon the opening, the existing Schönefeld Airport will cease operations, while Tegel Airport will also close. This follows the closure of Tempelhof Airport in 2008.

Jochen Heimberg, Head of the Environment Department of Berlin Brandenburg Airport, said: “Environmental sustainability is a key issue for Berlin Airports. Berlin Brandenburg Airport will thus be approximately 27% more efficient than required by law in 2007, when planning started.”

New power generators have been installed on the site of the new airport, while thanks to energy supply contracting, it will be supplied with heating, cooling and electric energy for a 15-year period. This energy will be supplied through trigeneration, gas-powered cogeneration modules providing electricity and heat, and use of heat and cold water storage modules.

“A further 50% of energy will be obtained in the form of certified electricity from renewable sources,” Heimberg added. Supplying the new airport with environmentally-friendly energy and building a new energy efficient terminal will lead to approximately 53% less CO2 emissions in its first year of operation compared to the two existing airports in 2010.

“The launch and certification of an integrated environmental and energy management system in accordance with ISO 14001 and 50001 is planned to coincide with the opening of the new airport. This system will help increase CO2 savings potential through a process of continuous optimisation.” Heimberg said.

Providing an example of how CO2 emissions will be reduced wherever possible, an innovative air conditioning system in the passenger terminal will allow for annual savings of around 53,000 MWh/a of heating, cooling and electric energy compared to conventional designs.

Long-term strategies

Renewable energy sources are also central to the environmental strategies at Frankfurt and Gatwick airports. In fact, the former plans to supply a percentage of its energy requirements using geothermal heat in combination with biogas, and has launched a joint venture with RWE’s D&S Geo Innogy GmbH subsidiary to explore the potential of the Waldorf deep-earth geothermal field near the airport.

Meanwhile, Gatwick Airport’s Waters explained: “We’re looking to set up our own energy centres to generate our own electricity, heat and so on, and we’ll be able to manage these ourselves.”

With Airport Collaborative Decision-Making (A-CDM) also playing an increasing role in helping airports and their key stakeholders reduce their environmental footprint, Gatwick Airport is currently undertaking the implementation process, while Frankfurt Airport has already achieved full implementation. “A-CDM has a very strong influence on the working practices of the groups in and around the airport,” Marx said.

As development works continue at Frankfurt and Gatwick airports, as well as the new Berlin Brandenburg Airport, environmental efficiency continues to play a key role. While a large part of the focus is currently on ensuring that the development works themselves have a minimal impact on the surrounding environment, the long-term strategies that have been developed will ensure that the environment remains at the heart of daily operations and any further development plans.

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**ADB ENJOYS SUCCESSFUL INTER AIRPORT 2011**

Airport experts are confident that this year’s Inter Airport show – in Munich, Germany – has sent out positive signals for the future of the airport sector. A total of 606 exhibitors from 34 countries, and more than 12,600 visitors attended this leading international exhibition for the airport industry. ADB Airfield Solutions, one of the global market leaders in Airfield Ground Lights (AGL), certainly made an impact with its exhibition stand.

All of ADB Airfield Solutions’ LED innovations and associated products and systems were on display. New products, such as the EREL/ERES High Intensity LED Runway Edge fittings or the Airfield Sensor, drew a lot of interest. Live demos of the AGLAS (Individual Lamp Control and Monitoring System) and APS (Advanced Power Supply) systems were regularly requested. The new AD DSG system for high intensity runway applications incorporated in the demonstration of the AGLAS system had visitors commenting on the neat design and the extremely good light output.

Visitors interested in reducing CO2 emissions were pleased to see ADB’s Solar Range, a partnership with Carmanah. The Solar Aviation Wireless LED (SAWL) and the Solar Runway Guard Light System were both on show.

A surprise to many visitors was the world standard FMT Docking Guidance system being displayed, thanks to a recent cooperation agreement with FMT, a technological leader in VDGS (visual docking guidance system).
At the recent Dubai Air Show, Emirates announced what it described as the single largest order in dollar value in Boeing’s history (for up to 70 777-300ERs valued at US$26 billion). This confirms that the biggest of the Middle East’s Big 3 (MEB3) carriers, just like local rivals Etihad and Qatar Airways, has no plans to reign in its ambitious growth plans. For many years, all three carriers have been exploiting their geographic position, midway between Europe and Asia, to create 24-hour air travel hubs. Apart from connecting Europe and Asia, all three carriers have also increasingly targeted Africa and North America to create truly global hubs. This analysis takes a closer look at the Europe - Asia market and what competition is provided by Europe’s global legacy carriers from the main European hub airports.

London Heathrow is leading European airport for MEB3 carriers

Combining the networks of Emirates, Etihad and Qatar Airways reveals that London Heathrow is by far the best served airport in Europe in terms of weekly frequencies. Between them, the MEB3 carriers operate 12 daily flights to Europe’s busiest airport. In second place, maybe somewhat unexpectedly, is Manchester airport, also in the UK, with a total of seven daily flights. A total of 11 other airports in Europe welcome at least three daily flights from the MEB3 carriers, with Frankfurt and Paris receiving between six and seven daily flights from these carriers. Surprisingly absent from this list of leading European airports are Amsterdam (which is only served daily by Emirates) and Madrid (served just daily by Emirates and Etihad).

No non-stop flights to Jakarta and Manila from Frankfurt, London, Paris

To see how Europe’s leading legacy carriers compare with the MEB3 airlines on major routes between Europe and Asia, an analysis of OAG data was undertaken to determine the busiest airports in Asia (excluding Australasia), which confirmed that Beijing was the region’s busiest airport followed by Tokyo Haneda and Hong Kong. Where more than one airport serves a major city (such as in Tokyo and Shanghai) data for the two airports was combined. The three leading European hubs served by the MEB3 carriers are London Heathrow, Frankfurt and Paris CDG. Analysis of the weekly non-stop flights provided by all airlines to the 14 leading Asian cities shows that London Heathrow has 325 flights to these 14 cities, Frankfurt 180, and Paris CDG 178. Hong Kong (93 weekly departures), Singapore (91) and Tokyo (88) are the best served cities from these three European hubs, followed by Delhi and Bangkok. Two airports, Jakarta in Indonesia and Manila in the Philippines, are not served non-stop from any of these three airports. However, Manila is served non-stop by KLM from Amsterdam, and KLM also serves Jakarta (but via Kuala Lumpur), while Garuda connects the two cities via Dubai.

No MEB3 flights to Taiwan at present

Analysis of how many weekly flights MEB3 carriers offer to Asia’s

THE EUROPE-ASIA MARKET
EUROPE’S GLOBAL LEGACY CARRIERS STRUGGLING TO KEEP UP WITH MEB3?

By Ralph Anker, Editor, anna.aero
leading cities reveals that Bangkok with 63 weekly departures (nine daily flights) leads the way followed by Delhi and Mumbai with 49 weekly departures each. Jakarta is served with four daily flights and Manila with just over five daily flights. However, Taipei in Taiwan is currently not served by any of the MEB3 carriers.

**MEB3 carriers strong in India, Indonesia, Pakistan, Philippines, Sri Lanka**

Analysis of OAG data for the first week of November helps highlight which of the leading European global hub carriers (Air France, British Airways, KLM and Lufthansa) and which of the MEB3 carriers serve which Asian markets from their respective hubs. Given that the four leading European hub carriers have extensive European networks, this gives a reasonable indication of which Asian destinations can be reached flying on a single airline and with no more than one stop en-route.

The MEB3 carriers all have extensive Indian networks, serve the four main airports in Pakistan, and serve Bangladesh (Dhaka) and Sri Lanka (Colombo). While future aircraft developments (such as the Boeing 787) are expected to make more ‘thin’ point-to-point routes viable, the ongoing expansion of the MEB3 networks in Europe, Asia (and elsewhere) means that the number of city-pairs connected with just a single stop offered by the MEB3 carriers is likely to grow faster than the number of city-pairs connected with just a single stop offered by Air France, British Airways, KLM and Lufthansa.

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*Source: OAG Max Online for w/c 7 November 2011*
In spite of the precarious economic climate, airport development is still very much a common theme across the industry, and as airport authorities continue to invest in expanding and upgrading facilities, ensuring operational safety remains paramount. Ryan Ghee spoke to Jan Metsovitis, Director, Aviation Business Unit, Athens International Airport, and Chairman of the ACI EUROPE Technical and Operational Safety Committee.

Airport development projects are invariably undertaken with strict budget and time constraints, but operational punctuality and a high level of safety and security both in the terminal and on the airfield must be prioritised.

"In major projects, actually even in smaller ones, programme managers want to finish on time or even earlier," Metsovitis explained. "Operations personnel would like to not have anything touched. Both views are understandable, but contradict each other."

In his role as Chairman of the ACI EUROPE Technical and Operational Safety Committee, this contradiction provides a typical example of the issues that must be overcome during any airport development project.

Metsovitis said: "Obviously, mitigating the impact on routine operations is a key factor. But considering ways to separate routine operations from works to the biggest extent possible is the best strategy to minimise the knock-on effects and the number of mitigating measures that may reduce capacity and impact passenger experience."

"Good planning, using the knowledge of people that are routinely operating the airport, can lead to practical solutions that may even become part of normal operations when the project is completed."

Best practice

Metsovitis highlighted Switzerland’s Zurich Airport as an example of the ability of an airport to develop facilities without impacting on the day-to-day operations. "It seems that Zurich is one airport that very well manages the process and the disruptions that come with working in relatively tight
AIRPORT OPERATIONS

WHAT ARE THE BENEFITS FOR YOUR BUSINESS?

How can airports optimise infrastructure or operations in a cost efficient way? This is one of the most important questions for airport owners, airlines, ground handling companies and consultants. The answer is: CAST Airport Simulation. The worldwide unique simulation software covers the full airport system: passenger movements within the terminal, as well as aircraft operations and vehicle ground handling and transport. Customers worldwide trust in CAST, especially due to the scalable level of detail. It allows an easy start, to get quick results and at the same time does not limit the user in the level of details – if required. CAST helps to identify measures that reduce costs, enhance operational quality and support important goals such as safety and minimised emissions. Development of the infrastructure, optimisation of processes, development of allocation strategies, as well as the test of new operational concepts or optimisation of peak traffic management are typical applications. Last but not least, the powerful 3D visualisation facilitates the common understanding and communication with management and customers and thus speeds up the decision processes.

CAST Airport Simulation software covers the full airport system: passenger movements within the terminal, as well as aircraft operations and vehicle ground handling and transport.

WHAT ARE YOU DOING TO IMPROVE THE PRM EXPERIENCE?

Over recent years, various initiatives and regulations have been passed in the aviation industry aimed at empowering and improving the travel experience for Passengers with Reduced Mobility (PRMs).

In Europe, PRM services are contracted to the airport operator, whilst outside of the EU services are contracted directly with airlines. Needless to say, airlines and airports processing these passengers have to ensure a good customer experience to avoid expensive lawsuits associated with travellers who are subjected to an undignified travel experience, unsatisfactory level of customer service or even injury.

In Europe, one of the latest and most notable pieces of technology aimed at improving the PRM travel experience is the SideBull passenger PRM (Ambulift). This innovative award-winning high lifter from Bulmor airground technologies, designed in partnership with Lufthansa Leos, is used to embark and disembark PRMs to and from aircraft. It has changed not just the customer experience for the better, but from the operators’ perspective is transforming the whole PRM process. Operators are seeing massive time and cost savings as a result of changing from conventional Ambulifts to the SideBull. In Europe, Fraport has been using the SideBull to great effect at Frankfurt Airport over the past four years, transferring over its entire Ambulift fleet to the SideBull, such are the benefits brought by this new technology. The SideBull has also been the preferred choice at Salzburg, Vienna and Brussels Charleroi airports. More recently, in the Middle East, Dnata/Emirates have also recognised the huge potential of the SideBull, having placed its first order in October.

In Europe, one of the latest and most notable pieces of technology aimed at improving the PRM travel experience is the SideBull Passenger PRM (Ambulift).
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Amsterdam Airport Schiphol saw passenger numbers increase by +3.8% to 45.3 million in 2010, and the projection for 2011 is growth to 49 million passengers. Indeed, the airport recently welcomed its one-billionth passenger. Ad Rutten, COO, Schiphol Group and Immediate Past President, ACI EUROPE, outlined developments to Ross Falconer.

The one-billionth passenger is an important milestone for the airport, particularly in the context of the airport’s growth. Schiphol was founded in 1916 and the 500-millionth passenger was welcomed in 2000 – only 11 years ago. The Netherlands itself has a relatively small domestic market, so Schiphol’s growth, to a significant extent, results from its hub function for Air France KLM. “The one-billionth passenger is, in that sense, a celebration of Schiphol as the window of the Netherlands to the outside world,” commented Rutten.

The refurbished Departure Lounge 3 was opened in September. For its design, Schiphol contracted the architectural firms of Benthem Crouwel NACO and Merkx+Girod, whose main task was to create an innovative retail and leisure area characterised by calm, light and logic. “The light, layered design of the façade gives the departure lounge its own, unmistakable identity. The subtle dot pattern was inspired by maps and embraces the shops like a soft skin,” said Rutten.

“The refurbished lounge presents an exciting synergy of Dutch and international brands.” Dutch designer Tjep designed a prominent area of the lounge. At its centre is a restaurant (Bread), cheese counter (Say Cheese) and a flower shop (House of Tulips) – all three concepts are strongly rooted in Dutch culture.

The flower shop became a glass canal house that elevates and descends over a small market display. When lifted up, the content of the house is spread out to form a small market. “The glass house represents the production source – Holland is the country of green houses – and the canal house represents the possible destination for the flowers. This combination of references makes it possible to avoid obvious clichés,” explained Rutten. “For Bread we developed a giant bread display! A feeling of authenticity has been underlined by the exclusive use of massive ash wood throughout the entire concept – inspired by construction elements used on the inside of antique Dutch windmills.” Sustainability played a vital role in the renovation of Departure Lounge 3, with sustainable building options used wherever possible. There is no additional demand for energy, while the number of facilities for the customer has grown. LED lighting has been used, as far as possible, in all of the shops. All information boards and screens have been designed to use less energy.

Energy Strategy 2020

Corporate Responsibility forms an integral part of Schiphol Group’s strategy; numerous initiatives are undertaken, placing a focus on safety, the environment and the surrounding region. The Energy Strategy 2020 programme sets out Schiphol’s targets in terms of responsible energy use and the reduction of fossil fuel consumption. This will be achieved through five different initiatives: creating an efficient energy management system, stimulating third parties at the airport to do the same, producing and storing sustainable energy onsite, applying IT to learn more about energy usage patterns, and increasing the level of awareness among Schiphol staff.

“Amsterdam Airport Schiphol intends to be CO2 neutral by 2012 with respect to the activities of the Aviation, Consumers and Real Estate business areas at the Schiphol location,” commented Rutten.

The airport has been recognised at the ‘Optimisation’ level of ACI EUROPE’s Airport Carbon Accreditation. It has developed a step-by-step plan to achieve a maximum reduction in CO2 emissions. For example, it plans to cut energy and fuel consumption, use required energy and fuel more efficiently, use sustainable energy and fuel, and compensate for its consumption.

Business trips made with Air France KLM are compensated via the KLM CO2 compensation service; trips made with other airlines are compensated through the Climate Neutral Group. At the end of 2010, Schiphol Group issued a tender for the purchase of 20 electric vehicles to be deployed in airport operations.
Expanding baggage capacity

Schiphol’s South Baggage Hall went into operation in March and has since won numerous awards. It is a significant element of the major investment programme known as 70MB (70 million bags), which is being implemented to expand baggage capacity. The airport is cooperating with airlines and handling agents on the 70MB programme, in which it plans to invest nearly €800 million in the period between 2002 and 2013. “The programme will allow us to handle 70 million baggage items per year and will help increase the capacity and flexibility of our baggage system, improve the quality of baggage handling and working conditions in the baggage halls – through, for example, mechanisation – and reduce the costs per baggage item for airlines,” explained Rutten. “The innovative, state-of-the-art technology used to reach these goals is unique in the world. Several awards for innovation have therefore been awarded to this project.”

The new 15,000sqm South Baggage Hall, located to the south of Departure Hall 1, is considered the showpiece of the 70MB investment programme. It is an ultra-modern space with six loading robots, two transfer unloading quays and a large-scale buffer with 4,200 storage positions. The hall is able to facilitate the baggage handling for several airlines for both check-in and transfer baggage, and was designed to facilitate efficient baggage handling in peak times, with the buffer used to store baggage with no immediate priority. Once the peak has subsided, baggage is sent from the buffer to the robots, which then start loading the containers. Schiphol is carrying out this project in collaboration with KLM, Vanderlande Industries and IBM. Vanderlande Industries, IBM and Grenzebach Automation designed, built and tested the system, which features space efficient applications with robotised loading of baggage.

Social media

Schiphol is embracing social media. It has more than 22,000 ‘likes’ on Facebook and over 3,000 followers on Twitter. Meanwhile, the Schiphol App for iPhone and Android has, so far, been downloaded more than 340,000 times. In addition, around 20% of visits to the airport’s website are via mobile.

“We started listening to customers and other people on social media who were talking about Schiphol. On the basis of the gathered information, we formulated our social media goals. At the beginning of 2011 we slowly started using social media actively. Little by little we are expanding our activities,” said Rutten. “Schiphol Group has its social media policy decentralised: people within the organisation use social media proactively and reactively to interact with our customers.”

The fifth busiest airport in Europe, Schiphol is experiencing continued growth, with throughput expected to reach 49 million this year. Welcoming its one-billionth passenger in October was a significant milestone for the airport, which has established a network of 303 destinations in more than 100 countries. Schiphol has grown into an airport that is vital to the Dutch economy and an important driving force for job creation in the region. Through its environmental initiatives and carbon reduction efforts, Schiphol is also demonstrating its commitment to growing sustainably.

The refurbished Departure Lounge 3 was opened in September. Dutch designer Tjep designed a prominent area of the lounge. At its centre is a restaurant (Bread), cheese counter (Say Cheese) and a flower shop (House of Tulips). The flower shop became a glass canal house that elevates and descends over a small market display. When lifted up, the content of the house is spread out to form a small market.
ICF Airports

ANTALYA AIRPORT

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

ICF Airports which was established in Antalya in May 2007 as a joint venture of German Fraport AG and Turkish IC İçtaş won the tender to operate all three terminals in 2008. Despite the global crisis in 2009, ICF Airports hosted more than 18.7 million passengers.

In 2010, ICF Airports hosted 22.2 million passengers with an increase by 19%. Domestic passengers increased by 19% and reached 3.6 million; on the other hand international passengers increased by 18.8% and reached 18.6 million.

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

ICF Airports invests to promote Antalya and the region.

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

AKTOB-ICF Airports cooperation

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

Routes Tourism Mediterranean

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

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

Best of Europe is Antalya Airport

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

ICF Airports conducting studies in the field of carbon accreditation since 2009 completed “reduction” level and become the only company which reached this level in Turkish aviation sector. Having TSE certifications in the field of Environment Management, Quality Management, Occupational Health Safety Systems and Customer Satisfaction Systems, ICF Airports is the only company which has four TSE certification in aviation sector and one of 25 among all sectors.

www.icfairports.com
Abu Dhabi Airports Company, proud host of the 2011 ACI Airport Exchange.

Abu Dhabi Airports Company has taken great pride in hosting the recent ACI Europe and ACI Asia Pacific 2011 Airport Exchange in Abu Dhabi, the first time this prestigious event has been held outside Europe. With Abu Dhabi International Airport having been awarded both ‘World’s Most Improved Airport’* and ‘Staff Service Excellence Award (Middle East)’** awards, hosting this successful event is yet another indication of our commitment to realising our vision of becoming the world’s leading airports group.

*2010 Skytrax Awards **2011 Skytrax Awards

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