INTERVIEW
Jost Lammers, CEO, Budapest Airport

AIRPORT COMPETITION
New empirical study launched

ACI EUROPE ASSEMBLY
Full report

TRAFFIC TRENDS
Where have all the fliers gone?
Europe’s most dynamic catchment area: Vienna, where 15.8m people want to fly with your crew.
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LET YOUR STORY BEGIN...

In 2011, the number of P2P travellers between Prague and European destinations grew by 12% to the total of 7 million passengers – the largest and most dynamic growth in all of Central Europe.
At many airports across Europe, the peak summer months have not lived up to expectations. Subdued passenger traffic and continued negatives for freight traffic reflect the bite of fiscal austerity as well as weakened consumer and business confidence. The winter season ahead of us looks set to be difficult, with renewed fears of capacity cuts by airlines. For many of them, oil price levels and weak demand mean that flying less is likely to make economic sense. This means both increasing seasonality and decreasing revenues for airports – with the challenge of service quality requiring that most of our facilities (and the underlying costs) be scaled for the peaks.

However, beyond the winter, prospects for the coming years are still for significant growth in air traffic – albeit at a slower pace than in the past due to weakened European economies and further market maturity. More fundamentally, while traffic growth used to be a given for (almost) all airports, this will not necessarily be the case. More selective growth is likely to be the norm.

The winter season ahead of us looks set to be difficult, with renewed fears of capacity cuts by airlines. For many of them, oil price levels and weak demand mean that flying less is likely to make economic sense.

Growing 2.0 invariably means that there will be winners and losers, but that’s part and parcel of the increasing competitive pressures on airports today. Airport competition is a reality in Europe and ACI EUROPE has been working tirelessly to get that message across. The independent study by Dr Harry Bush and Copenhagen Economics which we released before the summer provides ample evidence of this. Long gone are the times when the norm was for airports to be the dominant party in the airline-airport relationship. Yet, regulations at both EU and national level are still based on this largely unsubstantiated and old-fashioned assumption.

But more often than not, it is not just regulation, but also airlines’ behaviour that can be puzzling in its anti-competitive nature. Witness the efforts that a major European network airline recently deployed to prevent Amsterdam-Schiphol airport from welcoming the A380 operated by one of its competitors, as well as from offering dedicated lounges facilities. That same airline has quite an interesting take on the future development of its hub airport – in short, Schiphol should only invest in the capacity that it needs, not in the capacity that other airlines need. One can only hope that the national regulator will take a fair and enlightened view on these issues.

As usual, this issue of Airport Business also brings you up to speed with the latest developments on the stories that matter. The new roadmap for a gradual removal of existing restrictions on liquids, aerosols and gels is a positive development that owes much to our actions and the pragmatic approach of the European Commission. On the environmental front, after just 3 years, Airport Carbon Accreditation has firmly established itself as the carbon management standard for our industry. We also look at operational developments on the ground at several airports in Europe and highlight some of the ways that airports are adapting, improving and developing that flexibility which will be critical in the years to come.
Airports in the news

**Swedavia**
Swedavia has launched free wifi at 11 airports across Sweden. Designed to allow smoother travel for passengers, the initiative allows users up to 3 hours online.

**Manchester Airport**
In an ambitious move Manchester Airports Group has confirmed that it will sell a 35% stake to an Australian infrastructure fund, as part of a partnership in any successful bid for Stansted Airport.

**Gatwick Airport**
The UK's first 'virtual grocery store' has been launched in the North Terminal at Gatwick Airport. Customers browse interactive digital displays, and can both order deliveries and pay via smartphones.

**Brussels Airport**
Brussels Airport has announced a new 'Connector' project, to link Piers A and B. The move will include centralised security screening, and allow passengers an improved offer of shops, services, bars and restaurants. The project is due for completion by the end of 2014.

**Bordeaux Airport**
Bordeaux has selected a consortium to develop the surrounding real estate into a 'dynamic economic zone', to attract both national and international business. A particular focus is being placed upon the air technology sector.

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

**ACI EUROPE Best Airport Award winners**
- London City Airport, Edinburgh Airport, Hamburg Airport, Amsterdam Airport Schiphol, Manchester Airport

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Edinburgh Airport
Between 5 and 10 million passengers

London City Airport
Under 5 million passengers

Amsterdam Airport Schiphol
Over 25 million passengers

Manchester Airport
Eco-Innovation

Brussels Airport
Between 10 and 25 million passengers

Zürich Airport
Has received permission from the Swiss government to commence a $1 billion airport city project. The 200,000 square metre venture will attempt to transform the airport into 'Europe's premium international business hub'.

Stuttgart Airport
Has launched a worldwide competition, appealing for ideas and inventions that make air traffic in the air and on the ground eco-friendly and reduce pollution. The Aviation Award is €150,000 and thus one of the most lucrative in the industry.

Tallinn Airport
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**Bratislava Airport**
Bratislava Airport has opened the second phase of its new terminal. The completion of the Arrivals section now provides Bratislava with an easy navigable, comfortable and elegant 5mppa facility.

**Sheremetyevo Airport**
Sheremetyevo Airport is now officially capable of handling the A380. The extensive requirements to achieve this included having the correct facilities, equipment, and even staff training.

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BUDAPEST AIRPORT: WHATEVER DOESN’T KILL YOU MAKES YOU STRONGER

Hungary’s largest international airport has become accustomed to the limelight over the past 7 years, since it was originally privatised. It has become a by-word in the airport business for fresh thinking and innovation, not least due to its award winning strategy for attracting airlines. 2012 got off to a very difficult start, with the loss of its home carrier, but Budapest Airport is fighting fit.

Jost Lammers, CEO, Budapest Airport, outlined his strategy to Ross Falconer.

The past 8 years have rarely been dull for Budapest Airport. Hungary’s accession to the EU in 2004 had a significantly positive impact on the country’s economic development, then the government sought to privatisate the airport operating concession, eventually agreeing to sell the 75-year concession to BAA for €1.9 billion. While BAA’s flirtation with the company in 2006 was brief, Hochtief subsequently took it on and increased its interest in the airport to 49.9% last year. The remainder is held by four financial investors.

Today, Budapest is a major cultural and business centre of a country of 10 million people, with a developed, robust market economy. The airport handled a record 8.9 million passengers in 2011, but on 3 February 2012, the year took a traumatic turn when its biggest customer and hub operator, Malév, ceased operations. Faced with such a difficult situation, the bounce back to date has been impressive, with the airport having already managed to recover over 80% of its point-to-point traffic.

The grounding of national carrier Malév, after nearly 66 years of service, naturally forced Budapest Airport to severely adjust its operations. Cost-cutting measures included making 250 employees (20% of the workforce) redundant, while Terminal 1 was closed in May and all operations moved to Terminal 2.

However, the airport has moved into the post-Malév era with notable optimism, and in particular a swift response and recovery of point-to-point traffic. Malév accounted for around 40% of Budapest’s passenger traffic and air traffic movements. Significantly, it was also the only carrier operating the hub and spoke model; 20% of total passengers and 40% of Malév’s passengers were transferring at Budapest and that transfer product was gone overnight.

“It was no secret that Malév had been weak for several years, especially during the winter season. So when it happened, we were well prepared to immediately get in touch with other business partners – both existing and new,” commented Lammers.

Lufthansa was the first carrier to step in, launching new services from Berlin and Hamburg on 6 February. In the days following the Malév collapse, several carriers announced new services from Budapest,
including Air Berlin, Aegean, Ryanair, Smart Wings and Wizz Air. Importantly, Ryanair established a base at Budapest on 17 February with 5 based aircraft and 30 new routes. “It was initially our plan to recover 75% of point-to-point traffic within the first 6-12 months. We are very optimistic from what we have seen during the summer and we are already beyond 80%, which is very positive,” explained Lammers.

The airport has seen the proportion of low-cost traffic double in the wake of the Malév bankruptcy. In 2011, low-cost carriers accounted for 26% of passenger numbers; this year they will account for something over 50%. Wizz Air, now the airport’s biggest customer, has based a sixth aircraft in Budapest and opened 10 new routes, taking the total to 33. Wizz Air has recently obtained two of the regulated ex-Malév routes, starting new flights to Kiev and Tel Aviv from December. Asked whether the proportion of low-cost traffic would increase further, Lammers replies genially “That will be the exciting question for the months to come. At the moment there is a stable balance, which we are quite happy with as it gives us the full range of products for our passengers.”

While these encouraging developments have put Budapest firmly on the road to recovering point-to-point traffic, the loss of 1.5 million annual transfer passengers and the income generated by them has created a very difficult financial situation for the airport. “Of course, what is hurting most still is the lack of a transfer product. That is something as a top priority on our list, as well as the long haul traffic that was lost with the cancellation of American Airlines services to New York, and the loss of Hainan Airlines to Beijing,” said Lammers. “Malév and American Airlines were both members of the oneworld alliance, so the feed that came from both members of the oneworld alliance is harder to recover, it takes more time, but we are working on this very strongly with existing and new partners and we hope to see some successes for next year.”

**Incentives package**

The attractive incentives package offered by Budapest Airport has been vital in aiding its recovery. Under the scheme, which was introduced several years prior to the Malév collapse, airlines launching new routes could benefit from reduced landing fees for up to five years. For new long haul services, there is a 100% reduction in years 1 and 2, a 75% reduction in year 3, a 50% reduction in year 4, and a 25% reduction in year 5. For new short haul services, the discount in year 1 is 100%, year 2 – 75%, year 3 – 50%, year 4 – 25%, and year 5 – 10%. There is, additionally, a two-year route recovery incentive for airlines starting routes recently terminated by others. The discount in year 1 is 75% and in year 2 is 50%.

Lammers explained: “After privatisation, we made the strategic decision to focus on the business growth and introduced a detailed incentive scheme, which remains attractive in the current situation. We have very much seen success with this.”

The airport also works alongside its partners and national tourism authorities to promote routes and help stimulate growth. A key strategic objective is to increase long haul connectivity. Qatar Airways launched a direct daily service between Doha and Budapest in September 2011. Services were initially introduced last January with a stopover in Bucharest, with the stopover dropped as it became clear that the aircraft could be filled on the direct route. The service has, since May, been enhanced with an onward connection to Zagreb, which is an important commercial link for Hungary. “We hope these additional volumes might bring additional flight frequencies from Qatar or even a wide-body operation, because at the moment it’s operated with an A321. It’s a very positive development and we want to build on this and see this as a very positive example,” commented Lammers.

Securing a direct service to the US is a priority, with New York JFK a target. The recommencement of services to China is another; Hainan Airlines suspended its services between Beijing and Budapest in February. Lammers would also like to see more flexibility in the bilateral agreements with Russia, Turkey, Israel and Ukraine, where significant demand exists following the demise of Malév. The bilateral agreements
stipulate that one carrier from each country may operate services between the two on a reciprocal basis. With the collapse of Malév, Budapest Airport urged the Hungarian Ministry of National Development and the Hungarian CAA to nominate a successor airline to replace Malév. Of these routes, Kiev and Tel Aviv were awarded to Wizz Air in September with flights starting as of December. There is no news yet on the Istanbul and Moscow routes.

Relocation to Terminal 2

All airlines were relocated to Terminal 2 in May following the closure of Terminal 1. The airport decided to close Terminal 1, previously used by the low-cost carriers, as part of its efficiency drive following the demise of Malév. The overnight relocation went smoothly and the move was supported by the airport’s partners. Budapest Airport worked with its retail partners, jointly conducting marketing campaigns designed to increase shopping in travel retail outlets. These efforts also included a discount coupon campaign to direct departing passengers to the food court.

The reopening of Terminal 1 remains a possibility in the future, but is not foreseen in the next few years. Should traffic growth necessitate further expansion, it may be that Terminal 2 is instead expanded. “It’s a fantastic location – a midfield terminal between our two fully independent runways. We will keep it flexible; we have both options – reopening Terminal 1 or expanding Terminal 2. Terminal 1 is still being used currently for the airport company offices. We could restart operations in Terminal 1 within a week if needed,” explained Lammers.

Meanwhile, the land tax rules were modified in March, meaning the airport faces an extraordinary 230% annual increase. The news couldn’t have come at a worse time for the airport – just a month after the collapse of the national carrier. The disproportionately high tax has merely served to exacerbate pressure on the airport and further damage the competitiveness of the Hungarian economy and of Budapest in the region. “To close Terminal 1 was a reasonable thing to do anyhow to reduce our costs after the Malév bankruptcy, but this crazy additional tax is burdening us with an additional €6-8 million – to give some perspective, that is 12-15% of our annual operating expenditure today. On top of a situation in which we had just lost 50% of our business, it is just a disaster,” said Lammers.

Budapest Airport has since submitted a petition to the Constitutional Court of Hungary, arguing that the sudden increase in local land tax violates constitutional principles.

BUD Future project

Budapest Airport’s overriding strategic aim remains to be the leading airport in Central and Eastern Europe, and the €261 million BUD
Future modernisation and expansion programme, which was completed in 2011, is central to strengthening its competitiveness. The €102 million SkyCourt, which opened in March 2011, is at the heart of this modernisation. SkyCourt is a centrally located building linking Terminals 2A and 2B, which increased the capacity of Terminal 2 from 5 million passengers per year to 8.5 million. “We define the best airport in terms of the quality of services, the efficiency and the commercial success. We made a huge step forward when we opened SkyCourt last year. We have had a fantastic uplift in our ASQ ratings, which we monitor every quarter,” explained Lammers.

As part of its efforts to enhance the passenger experience on the ground, Budapest Airport introduced special Fast Track Lanes in July, which enable passengers to choose between the normal security procedure and a priority lane. The Fast Track Lane is available to any eligible premium passengers nominated by their airline in advance; economy class and LCC passengers can also use it by pre-purchasing the product or visiting one of the sales points in the terminal. “Budapest Airport had to respond to the change in airline mix and changes in passengers’ travelling customs – this is the main reason why we have decided to introduce the Fast Track Lane services. It’s about giving passengers the choice. We have had very positive feedback on the service,” said Lammers.

One-bag rule

On top of the various challenges the airport faces, the so-called one-bag rule being implemented by some low-cost carriers remains the single biggest threat to its commercial revenues. As with many airports, it is an issue that has created uncertainty and confusion among passengers. Budapest Airport has sought to work with its retail partners to introduce large bags in an effort to help passengers fit everything into one bag, but the core problem remains. “It doesn’t make sense if carriers on the one hand demand that aeronautical charges be reduced arguing that we have such a fantastic non-aeronautical business, but they are blocking, or limiting these opportunities on the other hand, through the one-bag rule. It is an important issue that counts as much in terms of passenger experience as commercial revenues,” asserted Lammers.

Environmental strategy

Budapest Airport is Airport Carbon Accredited at the ‘Mapping’ level under ACI EUROPE’s institutionally endorsed programme, gaining the recognition during the Hungarian Presidency of the EU in the first half of 2011. The airport has a strong commitment to environmental sustainability, and in 2007 launched an energy rationalisation programme, which saw it renovate airfield ground lighting systems, install solar panels on the roof of Terminal 1 and significantly reduce its gas consumption. Lammers commented: “We are very much focused on environmental initiatives. Reducing consumption of utilities is a priority. From the very beginning, after the privatisation, Budapest Airport, as part of the HOCHTIEF AirPort group, decided to give high attention to the environment. We undertook a voluntary noise insulation programme around the airport, and we undertook noise zoning, which was not an official requirement, to demonstrate that the airport is a good neighbour and that these issues are important to us.”

Road to recovery

While Budapest Airport faced a challenging start to the year, it is business as usual moving into the final quarter of 2012. Lammers poignantly says that “a new life started for us on 4 February”. The airport was well prepared and strong support from its airline partners means 80% of point-to-point traffic has already been recovered. Budapest Airport is looking to the future with significant optimism and with growth accelerating, is now looking to expand its network with more long haul routes, capitalising on the undoubtedly untapped market potential of the gateway to Hungary.
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A new independent empirical study finds strong evidence of airport competition in Europe, and urges European regulators to respond accordingly. Report by Donagh Cagney.

**AIRPORT COMPETITION — WINDS OF CHANGE LEAVE NO ONE UNTOUCHED**

**Airport competition in Europe**

Europe is an established fact of life. The impact of airport competition can readily be seen at route development conferences, such as the World Route Development Forum, where airports clamour and queue for the opportunity to display their wares to airlines. But if you haven’t been to one of these events, simply skim through the magazine you are currently reading. You’ll find examples of airports focused on efficiency, on customer service, on commercial efforts and partnership with other industry stakeholders. You’ll see advertisements promoting airport brands, and soliciting new business. These activities are not those of bloated monopolists, sitting back while revenues simply roll in. Rather these are the actions of lean and hungry companies, fighting and innovating to maintain their slice of the market.

The causes of this revolution stretch back to the 1990s. The liberalisation of the European airline market, and subsequently of bilateral agreements with many third party countries, changed everything. The move opened up airlines to full competition, and airports soon began to feel the knock-on impact. In this emerging competitive landscape, new airline business models came to expect relentless cost discipline from their suppliers, including airports. Structural changes accelerated these trends. Long haul routes are no longer the preserve of large hub airports, with new aircraft technology opening the market to secondary airports. Passengers became more discerning, and with a wider choice of airports than ever before, embraced information technology to ensure that they were making the right choices.

In parallel, airports embraced a new commercial approach, employing techniques such as branding and active marketing to airlines. Alongside this, new corporatised structures were adopted to best leverage airports’ commercial potential. All this further contributed to the competitive dynamic.

But while competitive forces have been busy reshaping the industry around us, the reality does not always seem to have filtered up to public decision makers. The evidence is all around us, but the dots have not yet been drawn together, obscuring the bigger picture. This matters a great deal, because these regulators are imposing — to varying degrees — restraints on airport commercial freedom which incur significant economic costs. Alongside the immediate significant direct costs of regulation, short-term prices may be distorted. In the medium-term regulation can incentivise investment in the wrong infrastructure. In the long-term, regulation can undermine the development of the best new technologies and business strategies.

A new independent Study by Copenhagen Economics, Airport Competition in Europe may help point a way forward from this sorry quagmire. Pushing rhetoric to one side, the Study takes a cold clinical look at the issue of airport competition, using hard data, economic and legal definitions of competition,
and a range of quantitative analytical techniques. The team behind the Study had no shortage of experience to draw upon either – it was steered by Dr Harry Bush, former Group Director of Economic Regulation at the UK Civil Aviation Authority, who oversaw the economic regulation of Heathrow, Gatwick and Stansted, among others.

The findings of the Study are unambiguous. There are a variety of competitive pressures facing European airports. As Dr Bush notes “Most European airports are now subject to competitive discipline from one or more sources – this should usually be sufficient to protect passengers and airlines.”

Airlines have a wide selection of airports to choose from, and they are making full use of their freedom. Route ‘churn’ is substantial, with route openings accounting for 20% of the market, and route closing amounting to 15% of all routes in a year, as airlines chop and change routes to maximise margins.

Airlines are also enjoying increased buyer power, which in many cases, more than counters any market power which airports might otherwise have enjoyed. Across all airports with more than one million passengers, 84% cater for an airline which comprises more than 40% of an airport’s capacity – that equates to an airline customer with a lot of muscle at the negotiating table.

Passengers too can pick and choose their airport of preference. Close to two thirds of Europeans are within a 2 hour drive of 2 or more airports. Route overlap is high, too. An analysis of a sample of airports showed that over 50% of destinations at the largest airport are also served by one or more airports around it. And this freedom of choice is not limited to origin-destination passengers. 62% of transfer passengers have one or more realistic alternative hubs to transfer through. This freedom of choice matters a great deal. In fact, it is the essence of competition.

If a dissatisfied airline or passenger can go elsewhere, then the airport knows that it must provide the right service or price to maintain that customer. This is particularly so for airports, which face a ‘double blow’ for each lost unit of traffic. If an airline decides to cut a route, an airport’s costs, being predominantly fixed, do not change by much, if at all. However, revenues drop dramatically – not only the aeronautical charges, but also the commercial revenues that passengers would have raised, had the route remained. The resulting gap between costs and revenues can be a very immediate and painful hole in an airport’s balance sheet.

So airports have had to be quick and energetic in their responses to competitive pressures.

Supplying a desirable product is key to these efforts. To this end, improving service quality is a key objective of many airports. While there are multiple individual examples of this, it is evident at an industry level also, 39 European airports took part in the Airport Service Quality (ASQ) programme between 2006 and 2011. In that time the average score for these airports increased by 8%.

And airlines and passengers are not playing for these improvements. Significant price pressures have seen the average European airports become cheaper relative to its international peers. This trend was boosted by the financial crisis of recent years. Responding to weakened demand in a competitive manner, almost 70% of European airports either lowered or kept their charges stable in 2009.

Having created the right product at the right price, airports then have to embark on intensive marketing campaigns. 96% of European airports actively market their airports to airlines – it is now an integral part of the business. Indeed, European airports consistently outperform their global counterparts, when it comes to participation on a range of different route promotion activities. These efforts are being augmented by route incentive schemes. Airports know that airlines expect them share the risk, if they want to share the benefits from new routes.

Taken as a whole, the evidence within the Study is indisputable. European airports have risen to the challenge of airport competition – it is now the turn of European regulators to do the very same.

Regulation cannot remain static while the regulated industry transforms radically. Orthodox economic theory and experience points a clear path for decision makers – where there is no market power, do not regulate. Where there are vestiges of market power, regulate commensurately. The variety of competitive pressures which airports are facing suggests that even when intervention is necessary, regulation should be less, but more effective, to ensure that competition is allowed to fully develop. Reflecting on the challenges facing regulators, Dr. Bush said “Regulators now need to ensure that the framework is fit for purpose – to do otherwise risks obstructing the development of the very competitive forces that have done so much for European passengers and airlines to date.”

Airline liberalisation by European regulators in the 1990s gave birth to a wind of change. This wind has blown across airlines and swept through airports, bringing irreversible change. It has now come full circle, returning to European regulators, demanding that they recognise the changes that it has wrought. The Airport Competition Study should help them do just that.

‘Airport Competition in Europe’ is available in the Policy Library section of the ACI EUROPE website – www.aci-europe.org. All figures referenced in this article are sourced from the Study.
Over the past 4 years climate change has been a huge political priority, in parallel to the business priority of becoming more efficient, given the economic and financial turmoil which has occurred as well. That efficiency drive has been particularly evident in the airport business, where airport operators have been hard at work, looking to lower their CO₂ emissions and become leaner by optimising their operations and in some cases, even becoming more energy independent.

The carbon management certification programme, Airport Carbon Accreditation has played a considerable role in driving and making some of these efforts more visible. And Year 3 saw several big announcements for the programme: ICAO giving its support to the programme, extension to Asia-Pacific and the moment the programme reached the ‘airports with 50% of European passenger traffic’ target. In fact, between July 2011 and June 2012, no less than 59 airports in 18 European countries succeeded (both renewals and new applicants) in becoming Airport Carbon Accredited at one of the 4 levels of the programme. These airports welcome over 52% of European passenger traffic each year.

Meanwhile, the programme’s extension to Asia-Pacific airports last November has already seen 5 major airports accredited: Abu Dhabi International, Bengaluru, Changi, Delhi and Mumbai, with strong signs of others following soon.

In Europe specifically, airports which became Airport Carbon Accredited for the first time during Year 3 of the programme include Madrid-Barajas, Barcelona El Prat and Lanzarote, along with Dresden Airport, Leipzig Airport, Liege Airport and Warsaw Airport. Among the airports which successfully moved up a level within the programme during Year 3, were Bologna Airport, Eindhoven Airport, TAG Farnborough Airport and Helsinki Airport.

Some 10 European airports were accredited or renewed as carbon neutral, including 6 airports in Sweden, 2 airports in Norway and 2 airports in Italy. These airports have been recognised as having achieved a significant reduction in their carbon emissions, actively engaging other stakeholders to lower their respective emissions and finally, offsetting any of the remaining CO₂ emissions that are under the airports’ direct control.

As the announcement of the Year 3 results, Declan Collier, President of ACI EUROPE and CEO of London City Airport said “Year Three of Airport Carbon Accreditation has really seen things move up a gear.

CO₂ REDUCTION & EFFICIENCY DRIVE GO HAND IN HAND FOR EUROPE’S AIRPORTS

Three years on from the launch of Airport Carbon Accreditation, ACI EUROPE took a moment at its 22nd Annual Congress in Madrid to give an update on the programme’s progress in Europe. The announcement – which coincided with the Rio G20 Summit and EU Sustainable Energy Week – provided the latest snapshot of carbon reduction and efficiency gains in this past year. Robert O’Meara reports.
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EC DECIDES TO REVISE DEADLINE FOR REMOVAL OF LAGs RESTRICTIONS

Regular readers of Airport Business will know that security and in particular, the rules concerning the carriage of liquids, aerosols and gels make regular appearances in this magazine. Airports, passengers, security equipment manufacturers and EU institutions are all watchful of this issue, which has such a profound effect on the passenger experience. Robert O’Meara reports on the latest developments.

Following last year’s postponement of the initial Phase 1 deadline for the lifting of restrictions on LAGs, the European Commission announced that April 2013 would serve as the final deadline for removing all restrictions on LAGs. To ensure that that deadline was achievable, the EC commissioned an independent study by Booz & Co (now a part of Leigh Fisher) on the matter, which included detailed trials and surveys carried out at a number of EU airports.

Last April, the European Commission (EC) took delivery of this study, which ultimately deemed that the April 2013 deadline was ‘not operationally feasible’. The EC subsequently presented the report’s findings to the European Parliament’s Transport & Tourism Committee and the European Council as well, proposing to postpone the April 2013 deadline.

The EC’s announcement to postpone was made on 18 July and immediately received support from Europe’s airports. Underlining the complexity of the LAGs issue, ACI EUROPE stated that this revised approach should ultimately improve the passenger experience and safeguard the integrity of airport operations.

Olivier Jankovec, Director General ACI EUROPE commented “As much as we would like to get rid of the existing restrictions on the carriage of LAGs, the trials carried out at several European airports have shown that the technology allowing for that just isn’t there yet. Further progress is needed to develop more mature and robust technology fully geared for operational reality and effectively improving the passenger experience. We support the approach proposed today and look forward to further cooperation with the Commission, Member States and the European Parliament”.

The proposed postponement was accompanied by a roadmap for the progressive removal of the LAGs restrictions. As a sign of the renewed level of commitment from all sides, a Statement of Intent was signed by the EC, the United States’ Transportation Security Administration (TSA) and a number of industry stakeholders, including ACI EUROPE.

Starting in January 2014, the Commission recommends that passengers should be able to carry on board all duty free LAGs provided that they are screened.

“Faced with security and operational risks and the need to safeguard passenger interests, a phased approach will be necessary to introduce the screening of LAGs. Starting in January 2014, the Commission recommends that passengers should be able to carry on board all duty free LAGs provided that they are screened. In the light of the experience gained and in close cooperation with its European and international partners, the Commission will then bring forward proposals for subsequent phases to achieve the final objective of screening all LAGs at the earliest possible date.”

In the immediacy, the existing LAGs legislation needs to be amended, which will need to be achieved before April 2013, and which also requires the agreement of the Member States and the European Parliament.
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ONE COMPANY – TOTAL SECURITY
European airports’ annual get together – the 22nd ACI EUROPE Annual Assembly, Congress & Exhibition – this year hosted by Aena Aeropuertos, took place in Madrid from 20 to 22 June. The central theme ‘Putting the passenger first’ saw a lot of airport companies and CEOs reveal how passionate they have become about meeting and surpassing the passenger’s expectations. Ross Falconer reports.

This year’s event was attended by around 400 delegates, representing airports, airlines, Air Navigation Service Providers, business partners, regulators and EU institutions. As usual, the event was preceded by a meeting of the ACI EUROPE Board, which included the participation of the ECAC coordinating committee composed of Directors General of Civil Aviation of several countries. A broad range of high-level speakers spoke on the central theme, taking in the myriad areas of airport activities. Europe’s airports are increasingly innovating to enhance the passenger experience and this was reflected in each of the conference sessions.

In his welcome address, Declan Collier, CEO, London City Airport and ACI EUROPE President, set the scene, referring to the current trading conditions for Europe’s airports. He explained that this is not just another recession in the usual aviation industry cycle of boom or bust. “This is about the impact of structural shifts in the global and European economy and their impact on aviation,” said Collier. “This kind of challenge cannot be treated in a business as usual manner; it requires a system-wide partnership not only within the industry, but critically it must include the active and positive participation of our policy makers and regulators.”

Collier also highlighted a disconnect between the current economic reality and the focus of policy making. He stressed that airport competition is a reality and the need for continuous public investment in airports, in the context of the forthcoming revision of the EU State aid guidelines for the aviation sector. “What we cannot accept is the idea that Europe should cease all public financing for airport infrastructure, while the rail network gets an astonishing €42 billion of public money every year. To do so would ignore the stark economic realities facing many of Europe’s airports today not to mention that it would ignore the way airports are financed outside Europe and by doing so place Europe’s airports at a competitive disadvantage to airports in other parts of the globe,” commented Collier.

ACI EUROPE Director General Olivier Jankovec delivered a ‘State of the Industry’ address, in which he explained that 2011 was a year of contrasted resilience with overall passenger numbers growing by +7.3%; the figures show that traffic in EU countries increased by +6.3% and in the new Europe by +11.8%. 2012, explained Jankovec, is the
moment of truth. The full-year forecast is +2% growth in passengers, but a -2% decline in freight. He also addressed financial performance, emphasising that 48% of Europe’s airports are loss-making – up from 41% in 2009. Jankovec explained that Europe’s airlines are moving from being supply driven to demand driven; this means reduced route opening, increased network volatility, pressure on airport charges and converging growth rates between the low-cost and legacy carriers. Citing the theme of ‘passenger experience’ and linking it to airport competition, Jankovec highlighted that airports are embracing new technology and the digital revolution, pointing to key figures from the ACI EUROPE Digital Report.

He went on to outline the 3 key strategic directions followed by airports as part of their business evolution process: Operational & Financial Performance, Service Quality and Corporate & Social Responsibility.

**Keynote addresses**

The first keynote address was from Emirates. Thierry Antinori, Executive Vice President for Passenger Sales Worldwide, Emirates stood in for CEO Tim Clark, who had to cancel his appearance at the last minute. The keynote coincided with the airline’s significant capacity into the Iberian Peninsula. Antinori announced a second daily flight on the Madrid-Dubai route, as well as the launch of daily operations from Dubai to Barcelona and Lisbon – each of these services was introduced in July. He explained how the passenger experience is at the heart of the development strategy in Dubai. For example, Emirates launched its Baggage Delivery Service at Dubai International Airport’s Terminal 3 last December, meaning customers no longer have to wait for their baggage on arrival. It is an initiative designed to ensure comfort and convenience for passengers. Strategically positioned immediately after the immigration counters, the service enhances the passenger experience by enabling the traveller to have their baggage delivered anywhere in the UAE on arrival at Terminal 3.

Emirates also offers self-service check-in via mobile and via kiosks, and Antinori explained that it will ultimately be the passengers that decide whether the self-service offer is expanded further. “It will depend what they want. We are a long haul airline, so our customers have baggage and will always require an element of human interaction,” he said. As part of this focus on customer service, Emirates has collaborated with Dubai Airports on the introduction of innovative ‘Information Zones’, which provide information on wayfinding and other airport services. The 40-inch LCD touch screens allow passengers to obtain directions to their gate by scanning their boarding pass.

Meanwhile, Concourse 3 – the world’s first dedicated A380 facility – will open at Dubai International Airport on 1 January 2013. The Emirates fleet currently includes 20 A380s and some 70 more are on order. The facility will boost the airport’s capacity from 60 million passengers per year to 75 million and is part of its strategy to optimise the travel experience for the increased passenger numbers.

Antinori also assured delegates of the continued importance of the European market for the airline. “There is a dynamism to Emirates in Europe. Among all of our growth areas, Europe is number one. We have 33 destinations in Europe and this year will offer 25% more seats in Europe than last year,” he commented.

Rohit Talwar, CEO, Fast Future Research, delivered an inspirational keynote address, in which he emphasised the importance of customer engagement and personalising the airport experience in the future. He outlined the effectiveness of innovations such as Qantas’ Next Generation Check-In Program, which makes use of RFID (Radio Frequency Identification) technology to allow passengers to check-in within five-seconds, while a permanent bag tag is also offered. Talwar also heralded the manner in which airports are embracing digital media and the prevalence of airport apps, in particular highlighting Copenhagen Airport’s smartphone app, which features augmented reality. The app allows passengers to ‘scan’ the terminals using their smartphone camera. The camera will then take photographs of points of interest, such as shops and restaurants, and highlight the distance to those points and also directions to navigate them.

**Enhancing the passenger experience**

The conference sessions then explored a range of subjects, including the evolution of the airport-airline relationship, improving performance and efficiencies on the ground, and providing a personalised experience and innovative commercial offer. Each session returned to the central theme of ‘Putting the passenger first’, offering a series of fresh perspectives.

Examples highlighted during the conference included the innovative ViaMilano Program operated by SEA Aeroporti di Milano. Giulio De Metrio, Chief Operating Officer & Deputy CEO, explained that it allows passengers to connect at Malpensa between carriers without an interline agreement – for example, arriving on a low-cost carrier and flying on to another destination with a full-service carrier. On arrival at Malpensa, passengers collect their luggage and hand it in to the ViaMilano transit...
desk; there, they receive a ViaMilano Program card that provides access to a Fast Track security lane, access to the VIP lounge, a €30 shopping voucher and free Wi-Fi access for 60 minutes.

Oliver Cussen, CEO, Dublin Airport Authority, similarly described the Airport Genie Connect product that can be used by ‘self-hubbing’ passengers at Dublin Airport. The service can be purchased for €35 for up to 6 travellers. An attendant is assigned to accompany the passenger from their arrival at Dublin Airport to the departure of their onward flight, assisting with hand luggage, accompanying them through Passport Control, into The Loop shopping area and on to the departure gate. Cussen explained that the service has significantly enhanced the passenger experience and driven up retail and F&B sales.

Jos Nijhuis, President & CEO, Schiphol Group, explained that Amsterdam Airport Schiphol is also “putting the passenger experience first”. Schiphol places great emphasis on interacting with passengers via social media and collaborated with Philips on the launch of Innovative Gate, which features lighting that can be changed depending on the brand colours of the airline using the gate. Lighting can also be used to change the ambience at the gate; for example, the lighting can be turned up when the aircraft is ready for boarding to encourage action. Passenger satisfaction is up and the feedback has been positive.

Meanwhile, Dr Harry Bush, former Group Director of Economic Regulation at the UK Civil Aviation Authority, revealed some of the key findings of a new independent Study by Copenhagen Economics – Airport Competition in Europe. A full report on the study can be found on page 17, but in summary, Dr Bush concluded that most airports in Europe are subject to competitive constraints and that there is enough evidence to question the old presumption that airports do have market power. He added that regulation should be avoided where there is sufficient competition in place.

The event also featured the airport investors’ Forum, which took the form of a panel discussion. Chaired by Arturo Recio, Global Head of Infrastructure, HSBC Bank plc, panellists included Craig Richmond, Regional Executive United Kingdom, Vantage Airport Group and CEO, Peel Airports; Nicolás Villén, CEO, Ferrovial Aeropuertos; Gunnar Moller, Commercial Director and Special Advisor to the Chairman of HNA Airport Group; and Michael McGhee, Partner, Global Infrastructure Partners.

The annual congress was an effective forum in which to share strategies and innovations designed to enhance the passenger experience, across all aspects of airport operations. It was clear throughout the conference that the central theme of ‘Putting the passenger first’ is at the forefront of the development strategies of Europe’s airports.

The Joint ACI EUROPE/ACI WORLD annual assembly, Congress & Exhibition, hosted by TAV Airports, will take place in Istanbul from 10 to 12 June 2013.
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- Pick and choose conference sessions to create your own unique agenda
- Keynote Arena – Each day will begin with high profile speakers presenting on our “Airports 2020” theme to all attendees simultaneously
- Our largest ever exhibition showcasing leading products and services for airside and landside purposes
- Free passes to view the exhibition
- A luxurious evening social programme to maximise networking
- Two tailored airport tours led by Schiphol experts on “baggage” and “security and border control” activity at the airport
- Speaker presentations provided to delegates post-event
- Join the ACI EUROPE World Business Partners’ meeting – a unique forum helping commercial enterprises maximise their business connections and expertise in the airport industry
Understanding the airports of 2020

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Speaker presentations provided to delegates post-event.

Join the ACI EUROPE World Business Partners’ meeting – a unique forum helping commercial enterprises maximise their business connections and expertise in the airport industry.

Reasons to attend

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Logan Teleflex is part of a new worldwide baggage handling systems family that is able to deliver wider ranging solutions to its customers.
Self-service bag drop has emerged as a key industry trend over the last 12 months with a number of new implementations either recently completed or planned across Europe’s airports. Ryan Ghee reports.

Although the pioneers of the industry started piloting self-service bag drop five years ago, it is still very much a new phenomenon. Among the latest airports to announce an intention to implement such systems is Bologna Airport, which is expected to complete the installation of 14 units by mid-2013. Aéroports de Paris has also successfully installed a system at Paris-Orly – which will soon be extended to Paris-Charles de Gaulle – while London-Heathrow intends to undertake a pilot.

Amsterdam Airport Schiphol provides one of Europe’s best reference sites for self-service bag drop and earlier this year, 6 new self-service bag drop systems were introduced in Departure Hall 2, taking the total number to 12. The implementation of the system followed close collaboration between the airport and based carrier KLM.

“We have worked very well with the airport because we both had the same goal, the same objective – to keep on growing within the same airport building,” explained Victor Vaessen, Manager Product Development, KLM.

The benefits of allowing passengers to take charge of the check-in and bag drop process themselves are clear. For the airline it means fewer agents are needed, passenger processing is faster and congestion around check-in desks is reduced. For the airport, it enhances the check-in capacity, reduces operational costs and allows for the optimisation of existing space.

One or two-step?
However, while all self-service bag drop installations are built on the premise of empowering the passenger, airports and airlines must decide whether to implement a one- or two-step solution. While the former allows the process of printing and attaching bag tags and depositing the bag into the system to be

VANDERLANDE AWARDED
DFW CONTRACT

Dallas/Fort Worth International Airport (DFW) has announced Vanderlande Industries as the official Operations and Maintenance provider for its Terminal E Inline Baggage Handling System (BHS) as well as its 35 Passenger Boarding Bridges (PBB). The Operations & Maintenance contract valued at over $11.5 million will be in place over the next four years, and includes a team of almost 50 persons. In addition to maintaining the legacy BHS and 35 PBBs in Terminal E, Vanderlande Industries will also be responsible for maintaining the new BHS scheduled to be installed over the next four years. Vanderlande Industries will also introduce its ViBeS remote monitoring and Business Process Intelligence (BPI) software and hardware. This revolutionary tool will be installed on the existing baggage handling system as well as the new system once phased in. The Vanderlande Industries Baggage Execution System (ViBeS) is a standard control solution for complete operational management of baggage handling systems. ViBeS gives insight into the baggage process from end-to-end, including planning, monitoring, optimisation and execution.
completed in a single transaction, the latter requires the passenger to print their bag tags at a self-service kiosk, before depositing their bag at a separate location.

As Vaessen explained, the implementation at Amsterdam Airport Schiphol makes use of the one-step process. "There were two main reasons for using one-step. The first was our home check-in passengers. More than 50% of our passengers check-in at home, so we didn’t want all of these to still have to go to a kiosk when they arrive at the airport and we simply wouldn’t have enough room for all of the kiosks. The one-step or two-step process depends very much on the infrastructure of the airport."

The two-step process, however, is also popular. ICM Airport Technics, which has supplied its system to Qantas as part of the Next Generation Check-In programme, utilises the two-step process and Duncan Watson, the company’s Head of Global Marketing Operations, explained that the process “maximises the available real estate for the airport departures concourse”. He added: "The two-stage process results in significant savings in both expenditure and footprint. It is better for the passenger to spend two minutes in Area A and subsequently 30 seconds in Area B, compared to two-and-a-half in a single stage process."

As well as the implementation by Qantas, ICM Airport Technics’ two-step solution is in place at a number of other locations. In fact, a total of 84 units have been implemented across 8 airport terminals – 6 in Australia and 2 at London-Heathrow.

Home printed bag tags

While the benefits of each process have clear merits that can be applied individually to each location, there is already a focus on how the overall baggage process can be further improved.

Two solutions that are gaining traction are permanent bag tags – which are already being utilised by Qantas for frequent fliers – and home printed bag tags, which can be printed and attached by passengers before they even leave home.

“We do believe in home printed and permanent bag tags,” explained KLM’s Vaessen. “We’ve run some pilots already with home printed bag tags and we’re working on an industry standard with IATA (International Air Transport Association). We hope to carry out some operational pilots next year.”

While improvements to the baggage process have been sought for a number of years to make cost savings and improve the passenger experience, airports, airlines and suppliers appear to be in agreement that self-service could well provide the best solution. As home printed and permanent bag tags are now developed to support self-service bag drop infrastructure, automated bag drop is likely to be one of the key areas of industry investment in the short and medium term.
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Over the course of the nine-month project, 400,000sqm of runway will be resurfaced using 85,000 tonnes of Marshall Asphalt, the airfield ground lighting will be upgraded with the installation of 1,900 runway and taxiway lights, and 530km of electrical cabling and 38km of ducting will be installed. The importance of the investment is highlighted by the fact that it will guarantee the safe operation of the runway for the next 12-15 years. Construction work started on 1 March and it is being undertaken in overnight windows six days a week from 21:40-05:30. To enable the works to take place, at 21:30 the runway is closed for operations and the Northern Runway, also known as

London-Gatwick’s Airfield Investment

The latest stage of London-Gatwick’s Capital Investment Programme is centred on significant upgrades to the airfield, including the complete refurbishment of the world’s busiest commercial runway. Ryan Ghee visited the site, where he discussed the project with Derek Hendry, the airport’s Construction Director.

Blastrac’s Shotblasting Solution

The removal of rubber deposits from runways is vital to ensure operational safety and a relatively new method, known as ‘shotblasting’, is proven to offer a number of advantages when it comes to improving the braking performance of pavement surfaces. Blastrac is a leader in the field of shotblasting, which is a cost-effective, environmentally friendly and high performance technology that helps to reduce the danger of slippery surfaces and remove rubber contaminants from airport runways.

It improves skid resistance of surfaces that have become polished with traffic or new surfaces that have a coating of bitumen binder over the aggregate particles. The improvement of runway micro texture with the Blastrac process has been repeatedly demonstrated to be extremely effective as in all cases it brings the surface micro texture back to that of the aggregate’s full ability. Shotblasting is the only technology that creates both macro and micro texture on asphalt and concrete surfaces. The shotblasting process used by Blastrac is fully controlled, safe and environmentally efficient. It uses no water, chemicals or solvents, emits no pollutants or dust, and the removed material can be fully recycled. Operating in over 80 countries, the Blastrac product range now has some 65 machines, from handheld products to truck mounted and fully remote controlled blasters.
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the Maintenance Runway, is brought into operation.

“Every single part of the project has to be carried out with military precision and we work very closely with all of the contractors to make sure that it goes to plan every night,” Hendry said. “Getting people working together as a team is one of the critical success factors and we have to make sure we complete this work safely and without disrupting the airport.”

At the peak of the project, around 300 workers will be working on the runway, making use of as many as 100 vehicles. Responsibility for ensuring that the project remains on track lies with VolkerFitzpatrick, which has been employed as the principal design and build contractor, and Alistair Thompson, Director Major Projects, explained that ensuring that every member of the team is fully aware of their own role is the key to ensuring a successful delivery. “Every night, every single person out here knows what has to be done and we never do more than has been planned. This helps to ensure that we stick to the specific timeframe that has been set out and so far we have handed the runway back ahead of time every morning,” he said. “As the lead contractor, we have four primary concerns: the safety of the workforce on the runway; to hand the runway back in a completely safe condition at 05:30 every morning; to meet our programme for the project; and to stay within budget.”

He continued: “We’re very pleased with how the project is going so far. We’ve had a few challenges with the weather, but that’s to be expected and you have to work around that. We’re looking forward to continuing to work closely with Gatwick to successfully deliver the project on time and on budget.”

Minimising waste
As with every aspect of the ongoing £1.2 billion (€1.5 billion) Capital Investment Programme, environmental sustainability is a vital factor in the runway refurbishment. Managing waste during the construction period is especially important and when the existing runway surface is planed off, the material is recycled wherever possible on other areas of the airport. Anything that cannot be reused on the airport site is instead utilised on other local projects. This environmental focus is in keeping with the airport’s target to reuse or recycle 85% of all construction waste. Stewart Wingate, CEO, London-Gatwick, said: “Every part of the project so far has been subject to environmental impact reviews and our focus will be on continuing our efforts in that direction. Our focus will also be on how we get the maximum and most efficient usage out of the single runway, two terminals and other facilities that we already have.”

Good progress
While undertaking any runway resurfacing in a live environment is testing, the London-Gatwick project comes with added pressure due to the fact that it is the world’s busiest commercial runway. “The runway refurbishment is the most important part of the investment because without the runway the airport couldn’t be operational. It is the world’s busiest commercial runway but that comes with the pressure of the project and having to keep it operational and safe,” said Hendry, who has previously overseen resurfacing projects at Glasgow, Aberdeen and Edinburgh airports.

However, in spite of the added pressure, Hendry stated that he is “happy with how everything is going” and explained that the project is very much on track in terms of the timeframe that was initially set out. “Our priority between now and the end of the project will be the continued safe operation of the airport,” he concluded.
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The reliability of runway friction testers in extreme weather conditions is perhaps something that cannot be definitely assessed, purely given the constantly changing nature of these conditions, particularly during the winter season. Indeed, the ultimate solution of relating the output from friction measurement devices to aircraft performance is still being sought. “The direct relationship has not been established, and most probably will not be found. Mainly because there is no fixed reference to which the measurements can be related,” commented Norheim. “Due to the lack of reference, one cannot use the term accuracy, but must use the term uncertainty. There are several elements in this uncertainty, one being the repeatability of the measurements. That is the ability of a measuring device to repeat the same measurements under similar conditions. The other is reproducibility; the ability of another measuring device of the same make and kind to reproduce a measurement under similar conditions.”

Reliability of readings

In terms of reliability of the readings, it depends on the type of extreme weather. Fraser-Bennison explained that many countries in northern latitudes can see stable winter conditions that persist for weeks and in some cases months. Where such conditions occur, compacted snow and ice can be

**HOW RELIABLE ARE RUNWAY FRICITION TESTERS IN EXTREME WEATHER CONDITIONS?**

Airport Business examines the reliability of runway friction testers in extreme weather conditions and what can be done to further enhance testing in such scenarios. Ross Falconer spoke with Paul Fraser-Bennison, Aerodrome Standards Officer, Safety Regulation Group, UK CAA, and Armann Norheim, Rapporteur, ICAO Friction Task Force.
assessed using Continuous Friction Measuring Equipment (CFME) and reliable readings passed to aircraft operators. Those operators have Snow & Ice tables to which they can refer in order to recalculate take-off and landing performance. "In other conditions, whether extreme or not, the variability of the contaminants typically encountered in wintery weather renders readings unreliable. This is because there are established technical criteria which bound the operation of all CFME. These include a dry runway and temperature above 2 degrees Celsius, so although a reading will be generated, it cannot be relied upon as the conditions were non-compliant," commented Fraser-Bennison.

He continued: "CFME is essentially a maintenance tool to measure trends in the change of grip displayed by a runway surface. If regular testing shows that the levels of grip are safe, then provided the runway is free of contaminants, an assured level of wet braking performance can be used by operators using aircraft manufacturers performance figures. No matter how extreme or otherwise the weather is, there are only a very limited set of circumstances that permit the tactical deployment of CFME."

**Training of personnel**

As regards further improving friction testing in adverse conditions, Norheim contended that the answer lies in the training of the personnel who perform the assessment of runway conditions during adverse weather. "The personnel should be trained and competent and know the possibilities and the limitations of the friction measuring devices, and use their best judgment when using measured data as part of their assessment when

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**Norheim: “Due to the lack of reference, one cannot use the term accuracy, but must use the term uncertainty. There are several elements in this uncertainty, one being the repeatability of the measurements.”**
allowed,” he said. “The further development of the actual friction measuring devices might give some extra quality, but it is not expected that a major breakthrough approved by the aircraft manufacturers will be the result. It is more likely that future development will be making use of the aircraft itself as a friction measuring device. The technology exists; aircraft can detect friction limited surface conditions. That is, surface conditions where the full potential of the brakes cannot be utilised. This information can be made available to the ground personnel, and maintenance activities be initiated to prevent the friction limited surface conditions developing further by reducing/eliminating their causes. There are projects using such technology already, and it might be more readily available in a not so distant future.”

Extreme weather, of course, constitutes a broad category of constantly changing conditions. Variable friction measurements seem inevitable; not resulting from technical limitations of friction measurement devices, but simply because of the ever-changing conditions during extreme weather.

**AUTOMATIC FREEZING POINT DETECTION**

Landing aircraft rely on the strip being properly prepared and ready for intense action when heavy wheels hit the tarmac. The wheels are responsible for safely carrying the dynamic load and for bringing the aircraft to a safe halt. A demanding task, especially when weather conditions are frosty.

Frensor is a patented solution for an exact detection of the freezing point temperature. The Frensor is by far more accurate and reliable than traditional ‘Bridge Freeze First’ warnings or thermometers. The Frensor can be installed in the runway as fixed units or as mobile units on vehicles, collecting surface freezing temperatures in real time. Frensors can also be connected to any host computer system via a serial port. The Frensor uses a Peltier element to heat and cool the fluid on the sensor head to determine the exact freezing point, and is independent of the de-icing fluid used. Cost savings up to 30% are within reach. Less de-icing fluid is also beneficial for the environment. The correct freezing point is detected, without special calibration, even if the fluid is contaminated with unknown chemicals. Typical applications are runways and bridge sprayer systems where correct and precise information is essential. The Frensor can also be used in mobile applications, built into an ASFT car for continuous friction measuring or in a handheld attaché case for investigations at various spots.

ASFT develops continuous friction measuring technology, complete with weather monitoring systems devoted to frost and precipitation.

**FINDLAY IRVINE’S SKID RESISTANCE TESTING FOR THE 21st CENTURY RUNWAY**

With the ever-reducing profit margin available to airport operators it is important that savings are made wherever possible. Managing runway surfaces to ensure optimum performance levels without compromising safety can be one such area were savings can be realised if done effectively.

From the maintenance perspective, management of skid resistance is important to ensure rubber build-up is kept to acceptable levels. Regular skid resistance measurements allow rubber build up to be monitored and removal activates undertaken only when necessary. This in turn ensures that rubber removal costs are minimised.

The MK2 GripTester from Findlay Irvine is a fast deployable solution for continuous skid resistance measurement. Also, the runway alignment system developed by Findlay Irvine is an add-on for the survey team, helping to ensure that the same sections of runway are measured each time, meaning better survey repeatability and therefore more reliable data. When using the runway alignment system, all data is recorded using GPS sub 50cm accuracy. This provides a further level of confidence in the data as the operator can prove where each data measurement was taken.

The MK2 GripTester is small enough to measure turn-offs and taxiways, and when fitted with the current ‘D’ Type axle can measure round bends accurately. The MK2 GripTester is therefore the ideal tool for managing the whole airside pavement area, helping operators implement the most cost-effective maintenance regime.

Findlay Irvine has developed a continuous surface friction-measuring device, micro GripTester, mGT, which operates in push mode. The micro GripTester is very useful for areas where it is difficult to test/ survey. The small pushable device is very effective for quick investigations on pavement surfaces and monitoring helidecks. The micro GripTester is seeing a great take-up in the Helideck market, ensuring surfaces and profiles are monitored to acceptable levels. The computer controlled water delivery system ensures that a controlled set of accurate data is collected, allowing friction to be monitored constantly and delivering trusted results. The simple to use software installed on the micro Grip Tester’s touch screen display guides the user through the friction test procedure with ease and stores the data straight onto the unit’s built-in hard drive or directly onto a USB drive to allow for easy transfer of data. The GripTester can be folded away easily and weighing in at only 23kg can easily be transported or stored – making it a simple, efficient one-person operation.
Boasting a variety of innovative features, the new Satellite S4 at Paris-Charles de Gaulle (CDG) has been designed to provide a relaxing environment, reflective of the city of Paris itself. Ryan Ghee reports.

**SETTING A BENCHMARK IN PASSENGER COMFORT**

Focused on the needs of long haul, wide-body operations such as those of Air France-KLM, but benefiting all passengers via enhanced capacity, the €580 million S4 satellite facility became operational on 28 June. The boarding satellite enables the SkyTeam alliance to concentrate its activities to the east of the Paris-CDG hub in terminals 2E, 2F and 2G and with a capacity of 7.8 million, it has raised the airport’s overall annual capacity to 42 million. Importantly, all passengers and airlines will benefit from the opening of S4. While this increase is vital to support Aéroport de Paris’ (AdP) growth plans for Paris’ main aviation hub, it also serves to highlight the level of importance that is being placed by the airport operator and its airline customers on passenger comfort. This is in part driven by the intensification of hub airport competition, for the all-important long haul traffic.

“Architects and engineers have designed S4 with the aim of facilitating passenger channels and making it as comfortable and pleasant as possible by offering them a walk through the city of Paris; arriving by metro, a shopping mall built on the model of the chic department stores with iconic French brands, then the boarding lounge – a window of European technology,” said Franck Goldnadel, Director, Paris-CDG.

“Passengers will be able to enjoy more than 6,000sqm of shops, bars and restaurants, mainly arranged around a large central square. These areas reflect the image of Paris and the art of French living.”

The commercial offering is indeed impressive, but it is the emphasis on creating a unique airport experience that is at the heart of the S4 project. The 25,000sqm of space dedicated to boarding lounges includes water walls designed by acclaimed Japanese designer Taro Suzuki, wooden patios, plant walls and trees. AdP also has plans to open a museum inside Satellite S4, which will be used to present original works from Paris’ famous museums.

“We wanted to provide our customers with a showcase for France and its know-how,” Goldnadel said. “Throughout the process of developing and finishing the building, this unifying goal encourages us to go the extra mile in creating a living space at least as good as the best available elsewhere in the world; a space that lives up to passenger expectations.”

“What we have created is a unique environment with plenty of space and comfort, a welcoming atmosphere, a user-friendly design to ease passenger flow, and a very high-quality retail offer.”

He continued: “S4 has also been conceived as a living environment in its own right, because we wanted to offer our customers an extension of their stay in Paris in terms

**INTOS’ INTERIOR EXPERIENCE**

INTOS is specialised in fitting out complete terminals. Its product groups contain check-in areas (counters, cabinets, stainless steel parts, canopies and accessories), counters and desks (immigration counters, information counters, gate counters, check-in counters, etc.), signage, security-related products (such as the Space Saving Search Cabin) and interiors for lounges, piers and gates. Manufacturing takes place in its own production facilities. INTOS has in-depth experience of engineering and development of interiors for every imaginable application at airports. INTOS strongly believes that engineering and product development are of paramount importance as, to a large extent, they determine the quality of the project. INTOS interior contracting was founded in 1991 as a firm manufacturing custom-made interiors for many different clients. It is about a decade since the company was first involved in a project for Amsterdam Airport Schiphol: the manufacture of information counters. As a result of this project, INTOS interior contracting later formed its airport division.

In 2011 INTOS interior contracting opened an international office in Dubai. This location enables INTOS to respond and work rapidly and effectively in the Middle East, Africa and India. INTOS’ airport division has completed many projects at various airports, such as Amsterdam Airport Schiphol (the Netherlands), Frankfurt Airport (Germany), Princess Juliana International Airport (St. Martin, Caribbean), Aéroport Marseille Provence (France), Malabo International Airport (Equatorial Guinea), Mongomeyen Airport (Equatorial Guinea), Kigali International Airport (Rwanda), Hurghada International Airport (Egypt) and Abu Dhabi Airport (UAE).
INTOS interior contracting is an innovative, international company specialised in the interior completion and fitting out of airports. Over the past 20 years, INTOS has grown to become one of the largest full-service interior contracting companies in the region. INTOS is considered a specialist for:

- Check-in areas
- Counters and desks
- Security related products & housings
- Signage
- Other airport interior projects (lounges, retail, piers & gates)

of its culture, its food, its shopping, and even its design. The best of Paris can now be found right here in the airport.”

Another of Satellite S4’s features is the exclusive 3,000sqm lounge for Business Class passengers. The design is also inspired by the outdoors, while passengers can make use of free Wi-Fi access, digital tablets and desktop workstations.

2F investment

The creation of the additional capacity thanks to the opening of S4 will now enable AdP to continue its improvement programme across other parts of Paris-CDG. Terminal 2F, which opened in 1998, is next in line for refurbishment and will be reconfigured to accommodate Schengen flights only, as opposed to the current processing of both international and Schengen flights.

“From late 2012, connections at Paris-Charles de Gaulle will be shorter and faster for passengers coming from a Schengen country and travelling to an international destination,” Goldnadel stated. “Because of EU security legislation, passengers will no longer need to pass through a security checkpoint during their stopover in Paris thanks to the single security checkpoint. 90% of customers from the Schengen area will benefit from this new single security checkpoint, representing 10,000 passengers per day. This will save passengers up to 10 minutes on their connection time. These new procedures will increase the attractiveness of the Paris hub.”

Goldnadel: “What we have created is a unique environment with plenty of space and comfort, a welcoming atmosphere, a user-friendly design to ease passenger flow, and a very high quality retail offer.”

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A fantastic summer of sport for Great Britain drew to a close on 9 September with the end of the Paralympic Games. On 10 September, London-Heathrow waved goodbye to 5,000 departing Paralympic athletes and officials. Nick Cole, Head of Olympic and Paralympic Planning, London-Heathrow, outlined the unique challenges presented by the Paralympics and the positive lasting legacy for the airport, to Ross Falconer.

The world’s eyes were on London this summer and London-Heathrow, as official ‘Host Airport’ of the Olympic and Paralympic Games, was firmly in the international spotlight. The phenomenal efforts of ‘Team GB’ were matched by the airport’s own Olympian achievements in successfully welcoming 80% of all Games-related traffic, including several hundred thousand spectators and more than 10,000 athletes.

During the Olympics and Paralympics, more than 75,000 journeys were made by Paralympians, Olympians and team officials, and over 2,800 wheelchairs were processed. The airport also handled 5,000 oversized bags including canoes, javelins, bikes and pole vault poles; 1,300 firearms plus ammunition; and 20,000 members of the media. The peak arrivals day for the Paralympic Games was 22 August, when London-Heathrow welcomed 2,100 Paralympic athletes and officials.

The challenge during the Paralympics was the complexity of passengers’ needs rather than the volume of passengers and bags, meaning it wasn’t necessary to use the temporary Games Terminal for departing Paralympians. However, 300 volunteers waved off each Paralympian with a Guard of Honour bidding them farewell.

**Improving accessibility**

The Paralympic Games naturally presented a different and greater operational challenge than the Olympic Games, given the complexity of handling increased numbers of Passengers with Reduced Mobility (PRMs). “The Heathrow team has spent the last seven years preparing for this challenge,” explained Cole. “We conducted rehearsals to test Perhaps the world’s most famous Paralympian, South African Oscar Pistorius, arrived at London-Heathrow ahead of the Games. He won two gold medals and a silver medal at London 2012.

HEATHROW’S PARALYMPIC SUCCESS LEAVES LASTING LEGACY

1,000 volunteers were recruited from local communities to assist travellers at London-Heathrow. The airport hopes this success will be continued. “We would like to have permanent volunteers, local people, working with us to welcome passengers to London and provide the best possible passenger experience,” commented Cole.
our processes and procedures, and have spent more than £20 million (€25m) in preparing for the Games. This includes installing new ramps and lifts to manage the number of passengers with reduced mobility using Heathrow, and we have given extra training for our staff and volunteers on the safe way to handle specialist wheelchairs."

In order to meet the challenge posed by the Paralympic Games, London-Heathrow partnered with mobility charity Whizz-Kidz. The charity offered first-hand, expert guidance on how to further improve the airport’s accessibility. It audited London-Heathrow’s terminal facilities and suggested a number of improvements, including increasing the number of specialist lifts, known as ambilifts, which are used to help PRMs embark and disembark aircraft. Heathrow now has 12 ambilifts – more than any other airport in Europe. The charity also recommended obtaining 13 scissor lifts and installing 100 new ramps to help load and unload wheelchairs; upgrading and increasing its fleet of buggies for transporting PRMs through the airport to a total of 60 vehicles; installing four new lifts to help return wheelchairs to the aircraft door; increasing the number of lightweight aisle chairs and self-propelled wheelchairs to 38 and 20 respectively; an onsite wheelchair repair service; and installing new accessible toilets. These improvements provide a positive lasting legacy, and Cole explained that this enhanced level of accessibility for PRMs was a key aim. “We are very passionate about this and this dedication is becoming infectious across the airport,” he commented.

‘Best possible passenger experience’

While diligent preparations were made to ensure the smooth handling of additional games traffic, it was business as usual for the 19 million other passengers using the airport during the same period. London-Heathrow handled 5,000 oversized bags during the Games period, including canoes, javelins, bikes and pole vault poles; 1,300 firearms plus ammunition; and 20,000 members of the media.

A Usain Bolt wax figure was unveiled in London-Heathrow’s Terminal 5, courtesy of Madame Tussauds.

OMNISERV AT LONDON-HEATHROW

Since Omniserv took over the PRM contract at Heathrow volumes of PRM passengers have risen month on month, year on year. In 2010 the volume was 776,429, in 2012 it will probably be a little over 900,000. Omniserv saw its busiest month ever – May this year, with almost 80,000 PRMs and its busiest day ever with over 3,400 PRMs. Volumes are being driven from various points. Passengers are becoming more aware of the services available to them and more knowledgeable about the legislation. The ageing population means more people want to travel.

To manage these volumes and provide services at a price that airports and airlines are willing to pay, Omniserv has had to find ways to be more productive and strategic in the way it handles PRMs and, of course, it has deployed more staff. It has increased buggy numbers and capacity, updated IT hardware and worked closely with BAA to find ways to move transfer passengers around the airport quicker and more easily.

What all PRM providers know is that pre-notification is vital information to be able to provide an effective and quality service. Omniserv has worked closely with many airlines on an individual basis that has seen pre-notification increase in the last 2 years. This was especially important for the handling of the Paralympic athletes. While Omniserv was aware of total volumes many months in advance, the finer details only became available in the 2 weeks before the event but meant that all the athletes received a prompt and warm welcome at Heathrow.

Omniserv worked closely with the IPC, LOCOG and BAA throughout its planning for the Paralympics. It attended the Parapan American Games in Mexico and also spent time with GB athletes. It learnt a lot about the needs of the athletes, how the teams work together and assist each other when travelling and just what they wanted from Omniserv. After developing processes on paper, they were tested with staff on empty aircraft and then refined when handling athletes for the many test events. Omniserv handled over 1,700 wheelchair athletes in and out of Heathrow, with over 1,000 leaving on one day on 10 September.
period. A real sense of theatre was created to enhance the experience of all passengers travelling through London-Heathrow. There were appearances by the iconic Beefeaters, London 2012 mascots and Queen’s Guards in each terminal; performances by the London Philharmonic Orchestra and Salvation Army Brass Band; the unveiling of a Usain Bolt wax figure in Terminal 5, courtesy of Madame Tussauds; and table tennis tables for passengers to try out the Olympic sport.

1,000 volunteers were recruited from local communities to assist travellers and Cole added that they had a hugely positive impact, which he hopes will be continued after the Games. “We would like to have permanent volunteers, local people, working with us to welcome passengers to London and provide the best possible passenger experience.”

The focus now is on the London 2012 legacy and many of the improvements at London-Heathrow will continue to benefit passengers for years to come. “Heathrow is proud to have been the ‘Host Airport’ and of the part we have played in delivering a successful Olympic and Paralympic Games. We want to capture the benefits brought by the Paralympic Games into our regular business as usual process to continue to make every journey better for all our passengers,” concluded Cole.

On 10 September, London-Heathrow waved goodbye to 5,000 departing Paralympic athletes and officials.
Despite the economic difficulties being experienced across much of Europe this Summer, the region’s airports and airlines have remained reasonably resilient according to anna.aero’s analysis of OAG schedule data for August. This shows that across 644 European airports scheduled seat capacity is up 1.2%, while aircraft movements are down 1.5%. Considering that since last Summer two major airlines have closed down (Malév and Spanair) and a number of smaller regional carriers have also ceased operating (Air Finland, Cimber Sterling, Czech Connect Airlines, Skyways) a small increase in total seat capacity can be viewed as impressive.

Analysis of the top 25 airlines operating at European airports reveals that 18 of them, including five of the top six, increased weekly seat capacity on a year-on-year basis. The seven top 25 carriers that have reduced capacity are Lufthansa, airberlin, Iberia, Alitalia, Thomson Airlines, Austrian and Finnair. Ryanair, Europe’s biggest carrier in terms of weekly seat capacity from European airports, increased seat capacity in August by over 10% according to OAG data, thus further increasing its lead over Lufthansa, which could soon be overtaken for second place by easyJet.

Air France’s growth is primarily down to its regional airport expansion in France, while British Airways has already absorbed bmi British Midlands’ European network at London Heathrow. Four of the top 25 airlines have reported impressive growth of over 20% in capacity during the last year. All four are LCCs with Vueling expanding considerably in Barcelona, Norwegian across many of its Nordic bases, Pegasus in Turkey and Monarch at various UK airports.

**Top four country markets shrinking, Norway and Turkey still growing**

Analysis of seat capacity by country reveals that the four biggest country markets in Europe for air travel (the UK, Spain, Germany and Italy) have all seen a year-on-year reduction in scheduled seat capacity. Greece has also seen a relatively small decline, but Austria (with Austrian Airlines downsizing), Finland (Finnair shrinking slightly and the demise of Air Finland), the Czech Republic (CSA Czech Airlines downsizing by over 40%), and Hungary (the demise of Malév) have all seen capacity reductions of at least 5%.

Among country markets reporting impressive double-digit growth are non-EU members Turkey and Norway, driven by the impressive growth of Turkish Airlines at its Istanbul hub (from where it serves more destinations non-stop than any other European carrier at any single airport) and Norwegian, Europe’s third biggest LCC after Ryanair and easyJet. Also performing well this summer are the joint hosts of the UEFA Euro 2012 football tournament, Poland and Ukraine, with scheduled seat capacity up over 10% in both countries.

**London and Warsaw get ‘new’ airports, Bucharest loses Baneasa**

In 2012 Bucharest’s second airport (Baneasa) has closed to scheduled services, giving a big boost to the city’s primary airport at Otopeni. Meanwhile, the closing of Berlin Tegel has been delayed until at least October 2013. In Poland the opening of Modlin airport has provided Warsaw with a second airport, and London Southend has successfully re-launched itself as a commercial airport with the opening of a new passenger terminal and multiple easyJet services.

The seven top 25 carriers that have reduced capacity are Lufthansa, airberlin, Iberia, Alitalia, Thomson Airlines, Austrian and Finnair.
This summer, URS completed the Masterplan for the development of Rome’s Leonardo da Vinci - Fiumicino Airport, which plans to increase its annual passenger capacity to over 100 million in 2044.

The Masterplan focuses on developing the area to the north of the existing airfield and outlines plans for two additional runways, a large new passenger terminal development with associated apron and taxiways, new surface access systems as well as related landside commercial developments.

After an international tender process and strong guidelines set by Aeroporto di Roma, URS was commissioned by AdR in January 2011 to develop a Masterplan for the remaining period of the company’s expected concession period. The URS airport planning team, based in the UK and led by Mike Jackson - Head of Aviation Planning, teamed up with London-based architects Pascall+Watson and Italian consultant 3Ti-Progetti to deliver this challenging project.

Fiumicino is Europe’s sixth largest airport, with an existing airport system consisting of three operational runways and four passenger terminals. The airport handled more than 37 million passengers and around 150,000 tonnes of cargo in the last year. Capacity is a critical factor at Fiumicino. The current terminal system is extremely busy and has limited spare capacity at peak times. The effects on passenger service levels and ultimately travel experience mean that the airport risks losing potential passengers, particularly in the business and transfer segments where travellers have the choice of using alternative competitor European hub airports despite a possible lengthier journey time.

Fiumicino, the primary base of Italian flag carrier Alitalia, has a dominant presence of the SkyTeam alliance processing half of the traffic at the airport.

Passenger traffic volumes are forecast to more than double over the next three decades growing from an existing 37 million to over 85 million in 2044. SkyTeam traffic alone is predicted to reach 47 million passengers with growing numbers of transfer passengers.

**The largest single terminal in Europe**

In the centre of the master plan is a large single H-shaped terminal development with the capacity to handle approximately 50 million passengers. The 650,000 square metre building, planned to a high level of flexibility with a hub vocation, contains four piers. The layout is designed for common use with a high proportion of transfer traffic in mind, ensuring competitive Minimum Connection Times and best international standards in terms of efficiency, sustainability, technology and architecture. With passenger experience and service levels being the main drivers behind the terminal’s configuration, the proposed building is able to accommodate up to 90 aircraft on contact stands.

The landside design includes new access roads and a link to the high speed rail network. The airport aims for 50% of staff and passengers to access the airport via public transport. A ground transportation centre forms the heart of the landside development and links the various transport modes to the terminal building. The development is complemented by a large business park including office space, hotels and conference centres, providing the opportunity for global companies to benefit from this international transport hub, transferring Fiumicino into a competitive airport city.

**A 5-Runway Airport**

One of the current airport’s main growth constraints is the availability of peak hour slots for new carriers and current operators to offer new routes. The forecast predicts a future demand of 170 air transport movements during peak hours. For this reason a system of 5 runways is developed, incorporating two existing parallel runways and one cross runway, able to handle the demand with sufficient capacity for future growth.

The airfield is planned for the specific fleet mix and airline operations at Fiumicino, yet kept flexible with a capacity of over 150 contact and remote aircraft parking positions and a double taxiway system to accommodate aircraft up to the A380. As part of the Masterplan, the proposed airfield was tested for operational efficiency and capacity by detailed airfield simulation modelling.

The Masterplan delivers a sustainable solution considering environmental matters such as, noise impact, air quality, energy generation, preservation of the existing landscape, as well as cultural and historic heritage. One aim is to produce 27.5% of the airport’s energy demand by renewable sources. Wind turbines, solar farms and a biomass centre are an important part of the sustainable strategy.

URS completed the study in July, AdR will now take it forward to the next stages.
LONDON LUTON’S MASTER PLAN FOR A ‘BIGGER, BETTER’ AIRPORT

The UK Department for Transport forecasts that by 2030, demand for air travel through London’s airports will have risen to 180 million passengers per year. London Luton Airport's Master Plan, which is currently undergoing a public consultation, foresees improving passenger facilities to enable the airport to handle 18 million passengers per year by 2031. Ross Falconer reports.

London Luton Airport
Operations Limited (LLAOL) has a concession with London Luton Airport Limited (LLAL) – a company wholly owned by Luton Borough Council – to operate the airport on its behalf until 2031. A series of sustainable developments are planned to enhance the passenger experience and provide additional capacity – the aim being to ensure that London Luton continues to play an important role as what it describes as ‘London’s local airport’.

The airport handled 9.5 million passengers in 2011 and its vision is a bigger, better airport, fulfilling a crucial role in providing more, high quality capacity in the London airport system.

Glyn Jones, Managing Director, London Luton, said: “The Mayor of
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Growth needs experts
London has proposed a new hub in the Thames Estuary to deal with the constraints on medium and long haul aviation capacity in London and the South East. We have outlined a credible and realistic plan that, if approved, will put Luton at the heart of solving the burden on point-to-point short haul operators who want to grow.

The airport has three key objectives, two of which are to make London Luton a ‘bigger’ and a ‘better’ airport. The three main components of the proposed initial development phase would include: Improvements to the terminal building through the construction of a new pier, and a new layout which can be achieved through minor extension works that won’t disrupt the running of the airport; extending the taxiway to increase the number of aircraft movements, creating new aircraft stands, and upgrading existing ones; and constructing two new traffic lanes to the south of ‘Airport Way’, leading into a newly created set down system in the Central Terminal Area, which will ease congestion and manage growth in the future.

One of the most significant proposed improvements to the terminal building is a two-storey infill extension at the front of the building, which will provide around 5,300sqm of additional floor space. The works will enhance the existing terminal building by bringing together the various existing building elements into a single cohesive structure, forming a focal point within the Central Terminal Area. The single terminal structure will be a highly flexible facility designed to rationalise passenger flows and remove, where possible, the crossovers of departing and arriving passengers.

The third objective is to be the ‘best neighbour’ possible and the airport recognises the importance of environmentally sustainable development. The Master Plan foresees an increase in access by public transport to more than 40% of passengers by 2017; a package of mitigation measures to minimise the airport’s noise impact; and an annual reduction in carbon emissions. Indeed, while the airport saw 8.9% growth in passenger numbers in 2011, it reduced carbon emissions. Indeed, while the airport saw 8.9% growth in passenger numbers in 2011, it reduced carbon emissions by 3.1%.

“By delivering against these three objectives, we believe that London Luton Airport can fulfil its potential of being both bigger and better, for airlines, passengers and communities,” commented Jones. “By combining real scale, ease of use and fast access to the capital, this Master Plan aims over the next 19 years to establish London Luton Airport as truly London’s local airport.”

**Economic Impact**

London Luton already makes a significant contribution to the local economy. According to its figures, the airport has an annual economic impact of £780 million (€980m) – a figure forecast to increase to £998 million (€1.3bn) over the period covered in the Master Plan. The statistics relating to jobs are equally impressive. Direct employment is currently 8,200 jobs, which the airport believes will rise to 9,900. The proposed development will increase levels of direct and indirect employment associated with operation of the airport. Meanwhile, increased passenger throughput will boost the economic value of the airport to both the local and regional economy. The airport currently generates £187 million (€235m) in annual revenue for local and central government; that figure is forecast to grow by £65 million (€82m) to £252 million (€316m) over the course of the Master Plan.

**Wizz Air’s Luton growth**

Then-Aviation Minister Theresa Villiers recently visited the airport and joined celebrations for Wizz Air flying its 10-millionth passenger through London Luton in just seven years. Indeed, it was also recently announced that Wizz Air will add a seventh Polish destination – Lublin – from London Luton in December 2012.

Villiers commented: “We have been clear that we want aviation to be able to grow, and it is encouraging to see how successful London Luton Airport has become. London Luton is playing an increasingly important role in the aviation connectivity in London and the South East, as well as opening up new markets around the world to the local economy and providing employment for thousands of people.”

Meanwhile, Jones explained that the strong working partnership that the airport has forged with Wizz Air has secured an average annual growth in passengers of 39% over seven years, opening up new markets around the world to the local and regional economy. “Despite the challenging economic climate the low-cost model which we have developed here at the airport has allowed both London Luton and modern, dynamic airlines such as Wizz Air to become successful growth stories,” he said.

London Luton has ambitious plans, which will be achieved within the existing airport boundary and by making best use of the existing infrastructure. Ultimately, the improvements outlined in the master plan will provide a significantly better terminal for passengers, as well as more efficient use of the runway and aircraft parking areas, to say nothing of the extra south-east UK capacity also being delivered.
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