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CONTENTS SPRING 2012

07
Olivier Jankovec, Director General, ACI EUROPE
2012 - The Moment of Truth

08
Airports in the News
A snapshot of stories from around Europe

11
Power to the regions!
Bologna, Bristol, Kristiansand and Toulouse-Blagnac give us the scoop on regional airports

21
Airport Package
Unwrapping the Airport Package

24
European Parliament Event
Airports and MEPs discuss Airport Package

27
Airport Carbon Accreditation
Momentum carries Airport Carbon Accreditation beyond Europe
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To some extent, last year has proven to be a surprisingly good year for European aviation. Despite dark clouds gathering over the economy, passenger traffic has shown a remarkable resilience throughout 2011, growing in excess of 7%. Of course, a closer look ultimately reveals a much contrasted picture between national markets, well beyond the usual divide between a mature Western Europe and an ‘emerging’ Eastern Europe. But the underlying trend is that passenger traffic has systematically outperformed GDP – even in a country like Greece, where it kept growing by nearly 2% in the face of an economy shrinking by 6.6%.

Were it not for falling freight traffic, this should be reason enough to celebrate. But with a stalled European economy and slowing growth in emerging economies like China and Brazil, freight is now firmly in recessionary mode. Whether air freight will bounce back or whether more structural factors are at play, remains to be seen. Lower production costs and reduced selling prices for many consumer goods may indeed no longer justify air shipment.

In any case, 2012 is set to be a moment of truth not just for aviation but for Europe as a whole. The ability to overcome the sovereign debt crisis and put back economies firmly on a growth trajectory will determine our collective fate. While passenger traffic has kept growing in January and February, the almost simultaneous demise of Spanair and Malev Hungarian Airlines does not bode well. Together with the state of the economy, several other determinants will affect aviation – including fuel prices, national aviation taxes and rising air fares resulting from the EU Emissions Trading System (ETS).

It is rather puzzling to realise that three of these traffic determinants are specific to Europe. It looks like they will further widen our competitive gap vis-à-vis the new powerhouses of this world, where economies are truly aviation-enabled. Conversely, Europe is increasingly becoming aviation-disabled. And the worst is that it does not seem to care that much about this worrying development.

Europe is increasingly becoming aviation-disabled. And the worst is that it does not seem to care that much about this worrying development.

By Olivier Jankovec, Director General, ACI EUROPE
AIRPORTS IN THE NEWS

Berlin Brandenburg Airport Willy Brandt
The first Operational Readiness and Airport Transfer (ORAT) trials took place at Berlin Brandenburg Airport Willy Brandt, with 250 volunteers passing through the airport, prior to its opening on 3 June.

Dublin Airport
Dublin Airport Authority (DAA) rebated €1.5 million to 30 airlines that increased their passenger traffic in Dublin last year under a growth incentive scheme operated by the airport manager. Among those receiving rebates were Aer Arann, Aer Lingus, Elihad, Lufthansa, Norwegian, SAS, Swiss and US Airways.

Birmingham Airport
Birmingham Airport's directors have given the go-ahead to extend its runway to accommodate more long haul flights. After obtaining planning approval in 2009, the airport will now gear up to compete directly against Manchester Airport.

Aéroports de Paris & Amsterdam Airport Schiphol
AdP & Schiphol Airports teamed up to offer an updated smartphone App for the Chinese. With information in Mandarin, and available for both iPhone and Android, the App was launched to coincide with the Chinese New Year.

Lisbon Portela Airport
Portuguese airport operator Aeroportos de Portugal (ANA) held its annual ANAwards, an event that honored the performance of the airlines that operated at Lisbon Airport in 2011. Awards were given to airlines under categories such as airline punctuality, environment and service quality, and annual traffic growth.

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Airports in the news

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.

Stockholm Arlanda Airport
Stockholm Airport City – a joint venture between the Swedish airport operator LVF Ltd and other parties – released 3 informative videos, giving more insight into the ambitious plans for this project.

Riga International Airport
A €2 million renovation and modernization of the airport’s shopping area has opened. With non-aeronautical revenues already accounting for 57% of total revenues, the investment will help the airport deliver quality services to its airline customers at competitive prices.

Marseille Provence Airport
Marseille Airport is launching a road tour, together with its industry partners, including Air France and Ryanair. The tours traveling around the region by bus, informing the public about the routes available and holding competitions to win free flights.

Athens International Airport
Athens International Airport announced a reduction in carbon emissions of 21% in 2011. Operating within Airport Carbon Accreditation – the independent institutionally-endorsed carbon management standard for airports - Athens decreased its emissions by over 14000 tonnes of CO2.

Belgrade Nikola Tesla Airport
The modernization and expansion of Belgrade Airport is in full swing. The work is currently focused on departure and transit lounges, as well as the security and passport control areas, with the initial phase to be completed before the 2012 Summer rush.

Lisbon Portela Airport
Portuguese airport operator Aeroportos de Portugal (ANA) held its annual ANAWARDS, an event that honored the performance of the airlines that operated at Lisbon Airport in 2011. Awards were given to airlines under categories such as airline punctuality, environment and service quality, and annual traffic growth.

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Birmingham Airport’s directors have given the go-ahead to extend its runway to accommodate more long haul flights. After obtaining planning approval in 2009, the airport will now gear up to compete directly against Manchester Airport.
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The 4 regional airports represented hail from 4 different countries in the North, South, East and West of Europe. While often facing their own unique challenges, they are united in their regional status and issues of shared importance. In this spirit of unity, they were in Brussels to meet with Philip Bradbourn MEP – rapporteur of the forthcoming Parliamentary Report on the Future of Europe’s Regional Airports. Airport Business sat down with them ahead of that meeting.

Challenges and opportunities

ACI EUROPE has developed a Regional Airports special publication – which will be released at the Regional Airports’ Conference in Ljubljana (2-4 April). The publication will highlight the challenges facing regional airports, as well as proposed solutions.

Europe’s regional airports operate in an extremely challenging environment, with difficult economic conditions affecting both consumers’ propensity to travel and their spending levels at the airport when they do. Sovereign debt crises and the threat of double dip recession have created an uncertain economic picture; airline network volatility adds to this uncertainty, with airlines increasingly flexible in moving aircraft and crews quickly. Indeed Ryanair grounded a record 80 aircraft this past winter, a move it attributed to rising oil prices.

“Combine this with an increased regulatory burden and inflationary costs and it is clear that regional airports are being squeezed,” commented Sinclair.

There was consensus that a pressing challenge for regional airports is ensuring long-term sustainability given the competitive environment in which they operate. Expanding on that competitive environment, Langeland added that increased competition means airports are generating less aeronautical revenue.

“It is clear that aviation taxes have a detrimental impact on regional airports and their ability to develop infrastructure. Similarly, in a tough economic climate such taxes can be the difference between the success and failure of new services at regional airports. Sinclair highlighted the example of Air Passenger Duty (APD) in the UK, which he said “is out of step with flight taxes in other EU States, and puts UK airports at a competitive disadvantage.” “In January 2012 alone, UK Treasury receipts from APD totalled £223 million (€268m), making it by far the highest aviation tax in Europe. At Bristol Airport we have seen the impact of APD increases on the viability of existing and potential routes,” he said. “On a more positive note, there is an opportunity for regional airports to provide solutions to capacity problems across Europe. Utilisation of surplus capacity where it exists can better serve passengers in the regions by providing more convenient access to air travel. This can also reduce the environmental impact of long surface journeys to more distant departure points in the process.”

Impact of liberalisation

The Single European aviation market, established in the 1990s, removed all restrictions on air services within the EU, creating the world’s largest liberalised aviation market. Vernhes explained that this had an extremely positive impact on regional airports, with the emergence of the low-cost carriers and significant growth of point-to-point traffic. “For regional airports, liberalisation was a good opportunity to develop European services. The low-cost model coming in to
Social and economic importance

Regional airports have a vital role in fostering economic and social cohesion. The connectivity provided by regional airports drives economic prosperity and enriches quality of life. "This is the main importance of regional airports – they are at the heart of their region and have a social and economic role that is very important for the development of the region," stated Vernhes. "Our airport is very closely linked to our local and regional environment. Toulouse is the home of Airbus and we are the Airbus airport for all of their test flights; we are also the commercial airport for the Toulouse area. Of course, when we develop the airport, we must have in mind that it is linked to the development of Airbus and also the development of the city – the two things are very closely linked."

Similarly, Bologna has strong export industries – notably Ferrari and Ducati – and the airport is a key contributor to its competitiveness. Brunini explained that connectivity is strategically important to this competitiveness – in terms of the region, its businesses and its tourism. He said: "We used to have mainly outbound traffic – now we are beginning to see more balanced inbound/outbound traffic, thanks largely to the airport creating new tourism. People are coming to Bologna for city breaks because we’re on the map now; we are in the networks of many airlines, including low-cost carriers."

Sinclair added that "increased labour mobility has stretched social and family networks across longer distances which only aviation can bridge. As a result, regional airports such as Bristol have seen a significant increase in VFR (visiting friends and relatives) traffic over the past decade." He also outlined an example of air travel supporting social and educational links – the Bristol-Bordeaux Student Exchange.
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had been running for more than 60 years, but faced closure in 2005 before the advent of an easyJet flight linking the two cities gave the programme a new lease of life.

The proximity to an airport is of critical importance to global companies when deciding where to locate their businesses. Key factors influencing relocation decisions include ease of access to markets and international transport links. Vernhes explained that all businesses choosing to operate in Toulouse want to be based near the airport. “We are the link between the city and the world. We see that Toulouse want to be based near the airport, and international transport links. We include ease of access to markets influencing relocation decisions to locate their businesses. Key factors are critical importance to global companies when deciding where to locate their businesses.

Brunini explained that unicredit – Italy’s largest bank – has its retail business unit headquartered in Bologna, and while Toulouse is the home of Airbus, Rolls Royce and AgustaWestland. “Aerospace is a global business, so international connections are vital,” commented Sinclair. “Local business organisations are very supportive. They recognise the value of a strong regional airport and encourage members to use our services where possible.” Several businesses within the oil and gas sector, for example providing offshore drilling equipment, are located in Kristiansand. Langeland highlighted the importance of connectivity with Amsterdam – the main hub connection for Kristiansand. “Without that connectivity, those businesses would probably relocate elsewhere,” he said. “Kristiansand is a small city with a population of 80,000 and they provide 3,000 or 4,000 local jobs, so the impact on the local economy is tremendous and the airport is important in that picture.”

Regulatory pressures
On the subject of regulation and whether the economic and operational specifics of regional airports are adequately considered at regulatory level, the consensus was that a ‘one size fits all’ approach is inappropriate. Regulation that suits Europe’s major hubs may not be best suited to regional airports. There was agreement that regulation is necessary, but with more flexibility. Langeland highlighted the differences in economies of scale and cost structures between regional airports and the larger hubs, and called for regulators to take that more into consideration when they regulate.

Brunini called for more “light-handed regulation” that better reflects the competitive environment in which regional airports operate. He was passionate in stressing the competition that exists for traffic, and also in other business areas such as car parking, which are an important source of revenue for regional airports. “This must be accepted by the regulator. We cannot have the worst of both worlds – we accept the free market, but we cannot be overburdened with regulation,” he asserted.

Sinclair concurred: “Any reduction in regulation would be welcome. While safety and security are ingrained in our business, the need for appropriate regulation in these areas is clear. The case for economic regulation is less justifiable. Aviation is an intensely competitive business, particularly at regional airports. In these circumstances, market pressures drive consistent improvements in the passenger experience without the need for regulatory intervention.”

Langeland: “An airport is not just an infrastructure provider. It is a business and acceptance of that is a good starting point in the airport-airline relationship.”

Airport Factbox
Kristiansand Airport

Top 2 airlines: SAS group (SAS/Widerøe), Norwegian Air Shuttle

Airport Manager since: 1 October 2006
Previous position: Director of Administration EFTA Surveillance Authority, Brussels, Belgium

Airport Traffic 2011:
953,202 passengers / 2,191 tons of freight
Growth rate 2011/2010: +13.5%

Number of employees: 58
Number of destinations: 4 national, 3 international, 8 international charter

He added that clearer consideration at EU level of the benefits that regional airports can deliver might lead to a more informed debate at Member State level: “The debate on future aviation policy in the UK is focused on addressing the issue of constrained capacity in London. As a result, the potential for regional airports to alleviate congestion and meet demand in a more efficient way can sometimes be overlooked.”
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Airports-airline relationship

It was agreed that a proactive partnership approach with the airlines is essential. Kristiansand, for example, is increasingly collaborating with its airline partners to build business cases for new routes, as is Toulouse. This dialogue has had positive results. Langeland said: “I believe that the airlines now look upon us as a business in our own right. An airport is not just an infrastructure provider, it is a business, and acceptance of that is a good starting point in the airport-airline relationship.”

Bristol Airport enjoys a positive and proactive relationship with its airlines. As an unregulated airport it works closely with its airline partners and has a high degree of input into the development of the route network at the airport. “We look for a long-term commitment and take a sustainable approach to route development,” said Sinclair. “We are not in the business of launching then pulling routes and will use our own market data to demonstrate which routes are most viable. Our ultimate aim is to maintain a diversified range of leading carriers across all sectors.”

He added that managing the different strategies and business models of the low-cost, charter, hybrid and full-service carriers is “a dynamic, fluid daily activity”.

Sinclair: “Aviation is an intensely competitive business, particularly at regional airports. Market pressures drive consistent improvements in the passenger experience without the need for the regulatory intervention.”

State Aid

On the subject of State Aid, there was broad agreement that there are issues of public service, particularly in remote areas, but that there must be a level playing field elsewhere, where airports are competing. “The rules of competition must apply,” stated Brunini. Vernhes added that the rules must be clear and also clearly enforced.

Sinclair expressed the view that airports operate in a highly competitive, efficient and commercial market. “They should be required to fund infrastructure, route development and marketing on their own commercial terms. It should not be the State’s role to intervene by making bets on which new routes will be viable,” he said. “To be successful in the long run, routes must be justified solely on their commercial merits. State Aid is particularly sensitive where competing airports exist either side of a land border. In such cases intervention will distort the market and waste public funds without delivering any consumer benefit.”

Ground Handling Regulation

The European Commission’s Proposal for a Regulation of Ground Handling services proposes full liberalisation of self-handling and the requirement for full legal separation of handling activities for airports. It is an issue of concern and an example of how regulation can have unintended consequences which contradict the original aim.

Two ground handlers currently operate in a very competitive environment at Bristol Airport. “The forced introduction of a third player would raise concerns over space and safety, and would ultimately result in a lowering of service standards. This is a clear example of how a ‘one size fits all’ approach to regulation can be damaging for regional airports,” asserted Sinclair.

Vernhes recounted a similar experience at Toulouse, where until the beginning of 2012, three ground handlers were operating at the airport. A fourth ground handler is now operating at Toulouse, specifically for easyJet, and Vernhes believes that four ground handlers is too many for an airport handling 7 million passengers per year. “I think the market will certainly contract from four to three,” he said.

Brunini added: “At regional airports, it’s not sustainable to have too many ground handlers. The high risk is that quality of service will go down. The legislator has to give us some tools to manage the quality of service and we don’t have them; we don’t select the handling agents – they’re contracted to the airlines.”

Brunini: “We cannot have the worst of both worlds – we accept the free market, but we cannot be overburdened with regulation.”
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What keeps you awake at night?

We concluded the interview by asking ‘What keeps you awake at night?’ The answers were varied and interesting. Langeland indicated the need to create sustainable growth and to ensure that travellers in the Kristiansand catchment area, particularly those travelling to international destinations, choose to fly from Kristiansand and not another airport.

Brunini highlighted the challenge of operating in a true market economy with pressure on margins. Vernhes expressed concern about the then forthcoming France-England Rugby match (England won 24-22 in Paris). “On the business side, here in Europe we are faced with the big problem of the sustainability of the development of the airlines. What will be the development of the airlines linked with our airport?”

Sinclair referenced the prospect of a prolonged recession, further increases in fuel prices, inflation remaining high, with no change to aviation taxes exacerbating an already weak demand environment. “These are the challenges we face in the regional airport sector, but in the light of day, we cannot let this overshadow the tremendous opportunities we have to contribute to economic recovery,” he said, while also highlighting the ‘one bag rule’, which has had a very detrimental impact on the airport shopping experience. “Where airlines are implementing the ‘one bag rule’ we look to work with them to minimise the impact on passengers. This can be a confusing message, so clear communication is vital,” explained Sinclair.

Regional airports clearly operate in a challenging environment, with regulatory and competitive pressures. They are also vital as engines of economic prosperity in their regions, and can undoubtedly play a vital role in the economic recovery with their untapped capacity. ACI EUROPE’s Regional Airports’ Forum offers an excellent opportunity to engage on these critical issues.

**INTERVIEW WITH PHILIP BRADBOURN MEP**

Philip Bradbourn MEP is rapporteur of the forthcoming Parliamentary Report on the Future of Europe’s Regional Airports. Here, he outlines some of the details to Airport Business.

**What does your report cover?**

Bradbourn: My report covers a number of key issues with regard to the future development of regional airports and air services, most notably definition of a regional airport, the future of State Aid for regional air services, quality and sustainability of air services from regional airports and ensuring greater competition in the sector.

**When will it be published?**

Bradbourn: It is already publicly available, as are amendments to the report. It will be voted in Committee on 27 March.

**What do you think of regional airports’ role in boosting economic and social cohesion?**

Bradbourn: Regional airports have a significant role in promoting economic growth in a region, not simply directly related to the airport and its services, but by encouraging inward investment into regions and in encouraging economic diversification by connecting different commercial sectors across the EU.

**Are you confident about the future of Europe’s regional airports?**

Bradbourn: Currently, I have mixed views on the future scope for regional airports. This is due to:

- General economic climate;
- Consolidation by airlines meaning less services (and downgrading the quality of those services) from regional centres both to major hub airports and direct to other regional airports;
- Problems associated with dominant players in the sector using their commercial power against the interests of smaller airports in terms of service contracts, fees and charges etc.;
- Lack of connectivity between different modes of transport in respect of some regional airports; and
- Failure by some airlines to invest properly in developing markets from regional airports and focusing too greatly on hub-hub operations, especially where there are valuable slots which could be used for longer haul services.

I do not wish to see regional airports become exclusively used by low-cost carriers to the detriment of scheduled airlines, as maintaining a mixture of services will better protect the future viability of regional airports.

EU policy, if directed correctly, could remove some of the problem areas, especially in strategies, which would ensure that larger regional airports were included in the TEN-T core network. Member States also have a role to play in promoting, within national aviation strategy, the value of regional airports and air services rather than simply focusing on services from one or two hub airports in each Member State.
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- Nicolás Villén, Chief Executive Officer, Ferrovial’s airports division
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On 1 December 2011, the European Commission announced its ‘Airport Package’ of legislative proposals concerning airport slots, ground handling and aviation noise, with an accompanying communication about the growing urgency of the airport capacity crunch. Robert O’Meara & Donagh Cagney report.

**European Commission**

Vice President responsible for Transport, Siim Kallas has been interacting with aviation industry stakeholders ever since he took office in early 2010, beginning with the volcanic ash shock and continuing with regularity ever since. The announcement of the Airport Package is a fundamental part of the work programme based on his vision for making aviation better for EU citizens.

First and foremost, airport capacity – the burning issue for Europe’s airport network – received some overdue political visibility. The EC communication within the Airport Package does much to recognise and underline the harsh reality and implications of the airport ‘capacity crunch’ for Europe’s medium to long term future, not just for aviation but for the economy as a whole.

The European Commission plans to better monitor airport capacity developments at a European level, so as to seek alignment with air traffic management capacity and the objectives/plans of the Single European Sky. Most promisingly, the Commission will consider asking governments to devise national strategies on airport capacity, specifically addressing network implications. This amounts to an acknowledgement by the EC that there is not enough progress on this issue at a national level. In an ACI EUROPE reaction statement to the release of the Airport Package, Director General Olivier Jankovec said “Given what is at stake for Europe in relation to airport capacity and the paralysis which has struck many governments on this issue, there is no doubt that the European level needs to play a greater role.”

While all aviation stakeholders can agree on the need for more airport capacity, the other aspects of the Package’s announcement received mixed reactions from the various stakeholders around the table. A number of airlines do not like the proposed changes to the EU Regulation on airport Slots. These include changing the use-it-or-lose-it rule from requiring 80% use of slots, to 85% use, as well as greater transparency on secondary trading of slots. Given that the original Regulation was based on established rules drawn up by incumbent airlines for incumbent airlines, airports are pleased that the proposed new Regulation is clearly focused on allowing more efficient use of available airport capacity.

Ground Handling is a particularly prominent part of the Airport Package. In the interest of quality at airports, there is an acknowledgement of the need for airport operators to be able to control and coordinate the different actors using their facilities, in particular ground handlers. Given how complex use of
the airport space is today, this needs to be adequately addressed – as it is essential to driving increased performance in ground operations to the benefit of passengers and effectively contributing to the Single European Sky.

However, ACI EUROPE said that it was disappointed that the proposal does not provide adequate tools for the airport to enforce these minimum quality standards, in case of non-respect by a ground handler.

Also less positive is the proposal to further liberalise the ground handling market, in a manner which several stakeholders said is not sustainable. Having already undergone revolutionary liberalisation in the late 1990s, ground handling is now a market in which airport operators account for just 16%, so further liberalisation seems extreme, particularly with the potential redefinition of self-handling, which could have a very negative impact on service levels at regional airports in particular.

In fact ACI EUROPE, alongside its general response to the Airport Package, issued a joint statement with 3 of the 4 European Social partners in the ground handling sector, warning of the adverse impact on operational inefficiencies and the undermining of the passenger experience. Jankovec commented “Any further deregulation at this stage will bring unintended consequences – not only reduced operational efficiency, but also dominant positions by larger incumbent airlines to the detriment of a truly competitive market”.

On the issue of aviation noise, the Package provides useful clarifications on the introduction of operating restrictions and the implementation of the balanced approach in Europe. However, ACI EUROPE is adamant that any new stringency level must be reasonable and still allow airlines to make the most of the economic life of their assets.

**DElIVERY?**

So, now that the Package is out in the open, what’s next? The European Parliament has appointed rapporteurs and shadow rapporteurs for each of the various policy areas within the Airport Package and they will consult, research and write their respective reports in parallel to each other. Of course, ACI EUROPE has started liaising and engaging with these very important institutional stakeholders.

More concerning however is the approach of the Council of the European Union in advancing with the Airport Package. Currently, Denmark holds the Presidency of the EU and it is said to be politically disinterested in some aspects of the Package. Apparently, the Council’s focus is very much on the proposed changes to the legislation on ground handling. This risks potentially breaking up the Package into separate pieces of legislation on different timelines. In political terms, this would also reduce the momentum and dilute the impact of Vice-President Kallas’ vision for European airports.

**The customary January meeting of the Board of ACI Europe took place this year on 25 January. As in previous years, the meeting was also attended by the European Commission Vice President responsible for Transport, Siim Kallas. At this year’s meeting, while exchanging views with Vice President Kallas, ACI EUROPE President Declan Collier reinforced the airport industry’s key messages, in particular relating to the ‘Airport Package’. President Collier emphasised the need for the Commission to take action to empower airports to stimulate local and European economic growth. This, he stated, should be reflected in the regulatory framework, particularly in issues such as ground handling, airport slots, and aviation noise, but also others such as security, external relations and the disruptive ‘one bag rule’ being implemented by some airlines.**
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AIRPORTS AND MEPs DISCUSS AIRPORT PACKAGE

ACI EUROPE’s follow-up work after the announcement of the European Commission’s (EC) ‘Airport Package’ continues. ACI EUROPE organised an evening reception in the European Parliament, on 24 January, to allow Members of the European Parliament (MEPs), ACI EUROPE Board members and EC officials to meet and exchange views on the details of the Package. Hosted by Inés Ayala Sender (Spain) and Jim Higgins (Ireland), both influential MEPs on the Transport Committee, the evening was a great success, with very supportive statements from both Ms. Sender and Mr. Higgins in favour of our industry, and attendance from a number of important MEPs, ACI EUROPE Committee Chairs & Vice Chairs, and representatives of the wider aviation industry.

Peter Marx, Vice President of Environmental Management at Fraport & Chair of the ACI EUROPE Environmental Strategy Committee with Eric van den Dobbelseen, Senior Manager of Passenger Services at Schiphol Group and Vice Chair of the ACI EUROPE Facilitation & Customer Service Committee.

Olivier Jankovec, Director General ACI EUROPE, Jim Higgins MEP, Inés Ayala Sender MEP, and Declan Collier, then Dublin Airport Authority CEO & ACI EUROPE President with Carlo Fidanza MEP.

Torborg Chetkovich CEO of Swedavia & ACI EUROPE Board Member with Anders Lennerman, Corporate Security and Safety Director of Swedavia and Chair of the ACI EUROPE Aviation Security Committee.

Jim Higgins MEP addresses the event, as Declan Collier, then Dublin Airport Authority CEO & ACI EUROPE President looks on.

Declan Collier, then Dublin Airport Authority CEO & ACI EUROPE President and Stefano Barocci, Secretary General of Assaeroporti with Jacqueline Foster MEP.

Thomas Langeland, Airport Director of Avinor Kristiansand Airport & Vice Chair of the ACI EUROPE Regional Airports’ Forum, with Philip Bradbourn MEP and Sarah Brookes, Head of Public Affairs at Manchester Airport & Chair of the ACI EUROPE Policy Committee.
Excess Baggage has been a luggage retailer at airports since it opened its first outlet at Heathrow back in 1991.

The new focus is on airside Duty Free retail and on luxury brands. Excess has always been one of the leading airport travel goods retailers, outselling all of its rivals through its busy outlets on the concourses of Heathrow, Gatwick and Manchester, as well as on major rail stations. Excess has now come up with a new branding and state-of-the-art luggage retail, which is complemented by the market leading luggage retail website, www.luggageexpress.co.uk, which allows airports to earn revenues both on airport and before travel. The company is a major vendor of market leading brands, and as the UK’s #1 airport luggage retailer, it is progressing alongside overseas expansion in the domestic market.

The first of the new stores opened recently in Heathrow’s modern Terminal 5, and has been a major success story with an immediate uplift in sales approaching 50%. The ‘Airport Concierge’ service includes hotel reservations, Wi-Fi roaming device and cell phone sales and rental, onward travel (train/bus/limo transfers), car hire, city and national tours, and museum access.

The ‘Bag Wrapping service was also an immediate hit offering passengers the ability to protect their bags in transit against damage, moisture, loss and pilferage,” she continued, “and importantly for us, we instantly had three businesses with one overhead cost.” The company shortly thereafter became Heathrow’s main supplier of Left Baggage services, whilst at the same time expanding its operations to other major airports and onto the rail network. Today, Excess offers well over 20 different services to Airports, grouped into three main areas. The core baggage services include Luggage Shipping, Bag Wrap, Left Luggage, Lost & Found/Lost Property, and of course Luggage Retail, whilst the range of ancillary services is impressive. These fall into two main areas. The first – ‘Airport Concierge’ – includes Hotel Reservations (inbound/outbound), Wi-Fi roaming device and Cell Phone sales and rental, Onward Travel (Train/Bus/Limo transfers), Car Hire, City and National Tours, Museum access, and diverse services such as flowers, sim cards for inbound and outbound passengers, Office Express services for travellers, as well as dry cleaning for staff and passengers. The second group of services is at the cutting edge of Duty Free, Elliot said: “Some time ago, we started operating Duty Free Shop & Collect, and we immediately realised that there was a massive untapped Duty Free ‘Home Delivery’ market, which prompted us to create ‘Shop & Ship’ and ‘Send-a-Gift’ services. Today, this has evolved into a whole range of Duty Free fulfilment options, ranging from check-in/security queue Duty Free pre-order, through in-lounge and PRM ordering, conducted by service agents, with gate/onboard collection.” Excess is enjoying a significant level of expansion this year with a large number of new outlets opening in its rail network to satisfy demand associated with the London 2012 Olympic Games, as well as a range of new airport locations. Expansion in the domestic market is progressing alongside overseas opportunities in the Americas, Europe, Middle East and South East Asia.

For further information from Excess Baggage Group Ltd call: +44 20 8324 2002, or email: retail.sales@excess-baggage.com
Airport Consulting Services

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If you are interested in obtaining more detailed information on any of the above services, please contact Mr. Spiros Lountzis, Head External Business Development at E-mail: LountzisS@aia.gr or Tel.: +302103537118, or visit us on www.aia.gr
MOMENTUM CARRIES AIRPORT CARBON ACCREDITATION BEYOND EUROPE

While the major players in the global airline industry remain embroiled in an increasingly dramatic battle regarding aviation’s inclusion in the EU Emissions Trading Scheme (ETS), airports have been quietly making progress on addressing their own CO₂ emissions, through Airport Carbon Accreditation. In November last year, ACI EUROPE joined forces with ACI ASIA-PACIFIC to extend the programme’s availability to its members. Robert O’Meara reports on the latest developments.

It has been a very busy few months for Airport Carbon Accreditation. Initially launched in Europe in June 2009, the independent, institutionally endorsed programme reached several landmarks since the last issue of Airport Business.

At the joint ACI EUROPE & ACI ASIA-PACIFIC annual event AIRPORT EXCHANGE last November, Airport Carbon Accreditation was formally extended to the Asia-Pacific region, making certification available to airports there. Abu Dhabi International Airport is the very first to become Airport Carbon Accredited in the Asia-Pacific region. Bangalore Airport has also committed to become accredited by the programme in the near future.

Patti Chau, Regional Director, ACI ASIA-PACIFIC said “We are delighted that Airport Carbon Accreditation is now available to Asia-Pacific’s airports. This corner of the earth will soon be the biggest aviation market in the world and airports are keenly aware of the need to make their facilities and operating processes as environmentally sustainable and efficient as possible.”

The extension to Asia-Pacific also coincided with ICAO lending its support to the programme, a development which is clearly a decisive step in the establishment of Airport Carbon Accreditation as the global standard for carbon management at airports. Raymond Benjamin, ICAO Secretary General said “Airport Carbon Accreditation is a highly significant initiative by airports for meaningful and measurable action in addressing their greenhouse gas emissions. I commend ACI for its success with the programme in Europe and for extending it to the Asia-Pacific region, in line with ICAO’s global strategy for dealing with climate change.”

Olivier Jankovec, Director General ACI EUROPE commented “When we first launched Airport Carbon Accreditation in June 2009, there was cynicism from some quarters that a voluntary initiative wasn’t going to have much success. But, as you can see, the demand for the programme has outgrown Europe and ICAO’s support is an acknowledgement that aviation is really leading the field in taking action to address its impact on climate change by becoming more efficient.”

But the good news doesn’t stop there. A burst of further applications in December/January, in particular from Scandinavia, has seen the number of accredited airports in Europe rise substantially over a period of about 3 months. Malmö Airport became the 5th Swedavia airport in the programme and joined its siblings in the ‘Neutrality’ level of certification. Düsseldorf Airport, Warsaw Airport, Helsinki Airport and the 8 airports of Finavia’s Lapland Group also recently became accredited, joining 46 others. As of February, some 55 airports in Europe welcoming 52% of European passenger traffic each year are now Airport Carbon Accredited at one of the 4 available levels of certification – ‘Mapping’, ‘Reduction’, ‘Optimisation’ and ‘Neutrality’.

Siim Kallas, European Commission Vice-President responsible for Transport, a long time supporter of the programme commented “Airport Carbon Accreditation is a fine example of an industry taking the initiative. I am delighted to see so many airports are now participating in the programme – it is clearly helping to move European aviation onto a more sustainable footing.”

His colleague, Connie Hedegaard, the European Commissioner for Climate Action was equally emphatic, saying “I am very happy to see that more than half of European passenger traffic is now passing through carbon accredited airports, congratulations! It is important that all parts of industry and society join in our efforts against climate change, and examples like yours are inspiring.”

Recent renewals within the programme have also seen Gothenborg-Landvetter Airport renew its status as a carbon neutral airport as well as Frankfurt Airport (the very first airport ever to become accredited back in September 2009) achieving ‘Optimisation’ for the very first time. Eindhoven Airport in the Netherlands and Bologna Airport in Italy achieve ‘Reduction’ for the very first time, while Budapest Airport has just renewed at the ‘Mapping’ level.

Chrystelle Damar, ACI EUROPE’s Manager for Environmental Strategy & Intermodality commented “The success of the initiative lies as much in its scientific robustness as in the airport industry’s long tradition of acting as a good neighbour and a good citizen.”

At time of press, Airport Carbon Accreditation is also due to make an appearance at the Aviation & Environment Summit in Geneva, at which Olivier Jankovec will make a special announcement about the achievements of the programme to date.

Final results of the CO₂ reduction achieved for Year 3 of the programme, will be announced at the 22nd ACI EUROPE Annual Congress in Madrid, 20-22 June 2012.
Environmental sustainability remains high on the agenda of Europe’s airports. Their strong commitment to carbon reduction is borne out by the success of Airport Carbon Accreditation which has so far accredited airports representing more than half of European passenger traffic. An interesting development has been the exploration of biofuels. Avinor and Aena, for example, are both researching the possibilities of biofuel production, while Hamburg Airport uses bio methane as vehicle fuel. Ross Falconer reports.

Avinor, which operates 46 airports and the entire ATM system in Norway, takes a proactive environmental approach. Two of its airports – Oslo and Trondheim – are Airport Carbon Accredited at the highest level – ‘Neutrality’, while Kristiansand has achieved the ‘Reduction’ level. Avinor is enthusiastically pursuing a study into biofuel production as the latest step in its carbon reduction efforts. Jon Sjølander, Avinor’s Strategy Director, explained that the clear aim is to determine how to establish commercially viable biofuel production in Norway. “We also aim to establish an estimated biofuel price, both based on Norwegian biomass and the prospects of imports of biomass,” he said. “We have initiated this study into biofuel production because we want to be a proactive and responsible partner for the aviation industry in Norway. Biofuels are one of the most promising areas in terms of reducing carbon emissions.”

Avinor has adopted a real partnership approach to its study into biofuel production – airlines including SAS and Norwegian, and the Federation of Norwegian Aviation Industries (NHO Luftfart) are represented on the study’s steering group. Sjølander emphasised that the aim of the study is sustainable and commercially viable bio jetfuel and is thus intended to benefit the entire aviation sector. However, within the airport environment specifically, there is the potential to use second generation biofuel in airport vehicles.

“The potential to help airlines lower emissions is huge. This is groundbreaking and very challenging work. In technical terms, it is currently possible to mix 50% biofuel with jet fuel in jet engines. Challenges in the years ahead are especially related to access to sufficient amounts of not-too-expensive biomass, but technical issues and distribution are also challenging. Big scale bio jetfuel production has not yet materialised,” explained Sjølander.

The study is in its infancy, but two areas of importance already identified are ensuring a sufficient supply of biomass, along with an acceptable price – it is an absolute precondition that it is commercially viable. One of the questions the study is attempting to answer is whether it is more cost-effective to start-up production rather
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than rely on imported biofuel. The study will also consider which type of biofuel has the most positive effect environmentally; Sjølander stressed that the production of biofuel must be sustainable, thus a thorough life-cycle analysis will also be conducted. “We are looking into all types of biomass and production technologies. There seem to be two particularly relevant biomass sources – forestry residues and macro algae from the ocean,” he commented. “We will publish our report in January 2013. Once the study is complete, we think there will be at least two different approaches for the future. In 5-10 years, we hope to invite interest from an industrial player and start large-scale production. I also expect we will end up with a more long-term view, where it’s possible to have some long-term research into even more promising areas.”

**Aena**

Aena is undertaking an ongoing microalgae-based biofuel production project at Madrid-Barajas Airport in collaboration with Iberia Airlines and AlgaEnergy (a Spanish company specialising in microalgae biotechnology). The platform is focused on research, experimentation and improving technologies for the cultivation of microalgae. As with the Avinor project, the aim is to achieve the profitable production of biofuel that can be used to power both aircraft and airport ground vehicles. Through photosynthesis, the microalgae transforms the CO₂ it captures into an energy source. Research into the cultivation and production of microalgae biomass at the facility is aimed at improving essential aspects of algae-based biofuel, from which second-generation biofuel can be made.

**Hamburg Airport**

Meanwhile, Hamburg Airport’s Head of Environment, Axel Schmidt, explained that while not a producer of biofuel, the airport, which is Airport Carbon Accredited at the ‘Reduction’ level of the programme, does use bio methane, based on Compressed Natural Gas (CNG) technology, as a vehicle fuel for its baggage tractors and passenger buses. “The bio methane used here is delivered by our municipal supplier,” he said. “Additionally, Lufthansa used biofuel for fuelling one A321 on flights between Hamburg and Frankfurt. This experiment, which lasted for six months, ended in December 2011 and was conducted to test whether or not biofuel can be used as a proper jet fuel.” Indeed, the trial was successful, with a total of 1,187 biofuel flights operated between Hamburg and Frankfurt. These biofuel developments are another example of the innovative strategies Europe’s airports are pursuing in reducing the environmental impacts beyond their own operations, to facilitate greater efficiency in the wider air transport sector. As air traffic continues to grow, biofuels have the potential to make an important contribution towards reducing emissions.
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ZAGREB TERMINAL CONCESSION TO ENHANCE REGIONAL HUB POTENTIAL

The Croatian Government has awarded the Aéroports de Paris (AdP)-led consortium Zagreb Airport International Company (ZAIC) the concession to construct a new passenger terminal at the airport. Tonci Peovic, General Manager, Zagreb Airport, and Chair of ACI EUROPE’s Regional Airports’ Forum, outlined details of the agreement and its potential impact to Ross Falconer.

Zagreb Airport handled 2.3 million passengers in 2011 – up from 2.1 million the previous year – and the investment in new infrastructure will facilitate its continued growth and potential as a regional hub. Peovic is a natural ambassador for Croatia and he is passionate about what his region has to offer. He can talk at length from its valuable and in some cases undiscovered tourist sites, to its growing business potential, as well as the importance of Zagreb Airport in realising this potential.

The 30-year concession agreement includes management of the existing and new terminals and related infrastructure, in addition to construction of the new terminal itself. Within three years, ZAIC will make a capital investment of €236 million in the first phase of the new facility – which will have an annual capacity of five million passengers – as well as an €88 million expenditure for regular maintenance. The investment is in the economic interest of Zagreb and Croatia as a whole, as Zagreb Airport has not seen any significant investment for more than 20 years.

Total concession fees over the 30-year period will amount to €1.94 billion (€534 million at present net value). The State requested compensation of €0.5 per passenger, but ZAIC offered more – €1.25 per passenger. Meanwhile, the tender documents stipulated a capacity in the first phase of 3.5 million passengers, so ZAIC also exceeded those requirements.

“The new Croatian Government evaluated ZAIC’s offer as exceptional and the decision on its adoption was unanimous,” commented Peovic. “Our French partners have properly assessed the current situation in the Croatian construction sector, so the offer is significantly better than what was required. Money will be saved in the long run, for when the airport reaches five million passengers – or in 20 years at the latest – the

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second phase must begin, which will expand capacity to eight million passengers."

Following signing of the concession agreement, there will be a one-year period of reorganisation in which plans for construction of the new terminal will be finalised. Construction itself will take two years.

Impact on tourism

Tourism currently accounts for around 20% of Croatia’s GDP and the development of Zagreb Airport will play a significant role in increasing this further. Croatia’s accession to the EU is due to take place on 1 July 2013 – before the new terminal opens – and it plans to join the Schengen zone in 2015. "In this way, the Croatian capital will be as accessible to EU citizens as Prague, Budapest or Rome. On one hand, Zagreb will be able to fully use its business potential, but on the other hand, there are tourist attractions within a two-hour drive of Zagreb that are still largely unknown to many visitors, including the Plitvice Lakes National Park or Lonjsko Polje Nature Park," said Peovic.

He also emphasised that this will not negatively impact on other tourist destinations, such as Dubrovnik, Split, Zadar, Rijeka and Pula.

In fact, on 15 & 16 March, ACI Europe Director General Olivier Jankovec visited the Croatian Minister for Transport and Croatian Minister for Tourism together with Tonci Peovic, as well as the CEOs of Dubrovnik Airport and Split Airport, Roko Tolic and Lukas Novak, to discuss airport development in Croatia as well as the Croatian regulatory framework in the context of next year’s accession of Croatia to the EU.

Zagreb Airport’s slogan is that it is the “gateway to South East Europe”. Its catchment area is enlarged thanks to an excellent highway system that enables passengers to reach the airport within a one-hour drive from the Adriatic Coast and parts of Slovenia and Hungary. “Today, Zagreb Airport, in partnership with Croatia Airlines, operates as a regional hub airport transferring passengers from the Adriatic coast to Western European routes. A big part of this is feeding routes for intercontinental traffic worldwide,” explained Peovic. “This is why we plan to establish Zagreb as an intercontinental point-to-point destination for global airlines, and to use Croatia Airlines as the operator for the intra-European travel of those passengers.”

New route support

Additionally, the low-cost segment only accounts for 12% of Zagreb’s traffic currently, and the airport would like to increase that proportion to 35%, making air travel accessible to more Croatian citizens, while also attracting year-round tourism to the region. easyJet currently operates three routes from Zagreb – to Dortmund, London-Gatwick and Paris-CDG, while germanwings operates to Zagreb from Cologne/Bonn and Stuttgart.

Zagreb Airport is targeting new routes to Australia, China, the Gulf region, Ireland, North America and Scandinavia, and has a scheme in place to support new routes by reducing airline start-up costs. This proactive approach shares the risk and is designed to enhance the possibility of route success. The airport may also look to offer additional marketing support.

“All the elements for development of an effective strategy are in place, because the new passenger terminal will provide more flexibility in pricing taking into account the needs of carriers and passengers. Zagreb Airport has already redefined its pricing policy for the carriers, but at this moment we face small possibilities to increase revenue from retail, catering and similar services,” commented Peovic.

Zagreb Airport is clearly entering a new, exciting and very ambitious phase in its development – one that will have a great impact on the city and its region. It will contribute significantly to tourism and bring in new business opportunities, capitalising on the air traffic potential of Croatia.
Whatever the size of their operation, all airports have one thing in common – an ongoing struggle to combat rising costs without compromising operational efficiency. Fortunately, technology is constantly evolving to provide cost-effective solutions to the challenges generated by soaring expenses, growing passenger numbers and ever-changing security requirements.

With over 80 years’ experience of developing innovative products and services for the aviation sector, ARINC has unrivalled expertise in this area. More than 300 airlines and over 100 airports use ARINC systems worldwide. The proven technology which the company provides across virtually all airport operations continues to help shape the future of the industry as it has done since ARINC pioneered air-to-ground communications back in the 1930’s.

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

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

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

vMUSE Enterprise is the latest in a range of services hosted by ARINC. These include Hosted Departure Control Systems (HDcS) for which the most recent contract was awarded by Servisair; and ExpressCheck, ARINC’s off-site common-use passenger check-in solution – Menzies Macau Airport Services in Macau, China has recently awarded a contract for installation at the city’s most prestigious casino resorts.

Indeed, ARINC’s status as a global leader in common-use passenger technology is demonstrated by the fact that it supplies over 60% of the world’s common-use self-service (CUSS) kiosks. These speed the check-in process, reduce queues, enable airline cost-sharing, save floor space and improve the customer experience.

ARINC will continue to exploit the benefits of common-use technology, including thin clients, virtualisation and cloud computing, by designing new systems to meet the ever-changing demands of the industry. At the same time, the company provides a comprehensive service to enhance customers’ legacy solutions, ensuring they are CUPPS compliant and certified.

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

To learn more email emea@arinc.com
It's a brave new world for airport economists and financiers, and the 4th annual ACI Airport Economics & Finance Conference, jointly organised by ACI EUROPE & ACI WORLD, and held in London on 7-9 March, brought together many of its pioneering spirits. Ross Falconer & Donagh Cagney report.

**AIRPORTS SHOW RESILIENCE AMID ECONOMIC UNCERTAINTY**

**When the advent of airport competition is discussed, it is often in terms of improved service quality, competitive pricing and innovative products. But there is a separate entire area of expertise which this development has spawned – an expertise which often goes unnoticed but which is fundamental to the functioning of our dynamic industry.**

Enter the airport economist and financier. Including airport CEOs, CFOs, investors, regulators and academics, these individuals deal with a multitude of different issues, from privatisations, to airport acquisitions, Public-Private Partnerships (PPPs) and capital expenditure financing. At its most basic, they ensure that funding is available to keep airports operating and expanding as and when required. The discipline is also truly a global one, with PPP deals in Brazil and airport regulation in India stimulating much of the debate and discussion within the wider industry trends. With this in mind, conference delegates were treated to opening remarks from the Director Generals of ACI WORLD and ACI EUROPE respectively, and addresses from heads of key airports and airport groups from Europe and beyond.

Angela Gittens, Director General ACI WORLD, opened with some global traffic statistics for 2011, which portrayed a mixed picture. Negative Cargo growth – often a precursor of things to come in the passenger market – led ACI WORLD’s growth estimates for passenger traffic in 2012 to be revised down from +5% to +3.9%. More encouragingly, Gittens noted that “Between 2011 and 2015, 7 of the top 10 growth countries will be African” and reminded delegates that the infrastructure will have to be in place to support this growth.

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Mention was also made of equally worrying developments, which threaten to undermine the financial sustainability of the industry. “We are facing challenges to commercial revenues. Some airlines are applying restrictive one bag policies, which are hurting some regional airports. There is also the looming threat of a ban on duty free sales of liquor and tobacco, which is being debated at the World Health Organization,” commented Jankovec.

**Airport Leadership Insight**

Colin Matthews, CEO of BAA, spoke about the importance of aviation to economic growth. In the UK, the debate regarding the importance of an effective hub airport has widened and business people are arguing that it matters that they can travel to their customer markets. “We describe London-Heathrow’s job as being to provide the maximum number of connections possible to enable UK business to thrive and trade,” Matthews asserted. “What is difficult to get across to the public is that, in order to make long haul destinations viable, we have to win tough competition for transfer traffic.” BAA is investing significantly to secure London-Heathrow’s competitive position – to the tune of £110 million (£120m) every month.

Dr Yiannis Paraschis, CEO, Athens International Airport and Chair, ACI WORLD, spoke about the airport’s Public-Private Partnership (PPP) and in particular highlighted the impact of the current economic troubles. “We have experienced, in our case, that extending or modifying concession terms or

**Industry Insight**

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Angela Gittens, Director General ACI WORLD, opened with some global traffic statistics for 2011, which portrayed a mixed picture. Negative Cargo growth – often a precursor of things to come in the passenger market – led ACI WORLD’s growth estimates for passenger traffic in 2012 to be revised down from +5% to +3.9%. More encouragingly, Gittens noted that “Between 2011 and 2015, 7 of the top 10 growth countries will be African” and reminded delegates that the infrastructure will have to be in place to support this growth.

Focusing on Europe, ACI EUROPE Director General Olivier Jankovec indicated that while the EU is going through tough economic times, passenger traffic outperformed economic growth by 4 times, growing by +6.3% compared with +1.5%. “There is a contrasting picture between the EU and ‘new Europe’ led by Russia and Turkey, where there is strong growth,” commented Jankovec. Indeed, passenger traffic increased by +11.8% in ‘new Europe’ in 2011, while GDP rose by +5.1%. Moving beyond traffic, Jankovec spoke about some of the wider trends within the industry, in particular outlining the risk sharing which now exists between airports and airlines. “In recent years, airports have changed the structure of their charges, putting more weight on passenger related charges,” he explained.

Mention was also made of equally worrying developments, which threaten to undermine the financial sustainability of the industry. “We are facing challenges to commercial revenues. Some airlines are applying restrictive one bag policies, which are hurting some regional airports. There is also the looming threat of a ban on duty free sales of liquor and tobacco, which is being debated at the World Health Organization,” commented Jankovec.
PPP is a very difficult exercise,” he said. “Despite a -6.3% drop in traffic in 2011 in an unstable market, we will still distribute a dividend to shareholders of €111 million – that looks like a good investment for public and private shareholders.”

Dr. Waleed Youssef, Chief Strategy Officer, offered the TAV Airports Holding view on airport investment. TAV Airports has entered into a contract for the acquisition of 38% of its issued share capital by Aéroports de Paris, and Dr. Youssef said “We’re at a very exciting time at TAV Airports.” He speaks with no small amount of experience. Now 11 years old, TAV Airports operates a portfolio of 10 airports with an annual throughput of 53 million passengers. Significantly, a consortium led by TAV Airports has signed a Build Transfer Operate contract with GACA, the Civil Aviation Authority of Saudi Arabia, for Medina Airport – the first airport privatisation in Saudi Arabia. Dr. Youssef explained that an investment of approximately $1 billion (€760m) to $1.5 billion (€1.14bn) is expected, with the consortium to construct a state-of-the-art passenger terminal in the first half of 2015 and operate Medina Airport for 25 years.

General Manager of ICF Antalya Airport, Alexander-Sven Laukenmann shared his own views on the privatisation of the airport. The airport – winner of the ACI EUROPE Best Airport Award in the 10-25 million passengers category in 2011 – is a hugely successful example of a privatisation project. In April 2007, a consortium of Fraport and ICTAs Holding secured the tender to operate all three terminals at the airport, with a total concession payment amounting to €2.37 billion – it was the largest privatisation project in the aviation sector in Turkey. Reflecting on the deal, Laukenmann noted that the financing strategy was and continues to be based on “strong investors with competing strengths and aggressive financing with sensible lenders”.

Miriam Ryan, Head of Strategy at Dublin Airport Authority (DAA), took a different tack, speaking about how economics skills can be applied strategically within an airport. In particular conference delegates learnt just how integral Key Performance Indicators are to performance management within DAA. Strategic core objectives for the business are defined and these are then extrapolated and cascaded down through the organisation, ensuring that management across the company are working together to meet the same ends. This approach is very much reliant upon Key Performance Indicators, which provide both targets to aim for, as well as allowing subsequent assessment of performance. Emphasising the dynamic nature of the process, Ryan pressed upon delegates that objectives and performance measures must be continually reviewed and reevaluated, to ensure the business as a whole continues to operate in the right way, and towards the right goals.

The Bankers

Widening its scope, the conference also gained the perspective of external investors, who are now deeply engaged in all facets of the airport industry.

Michael McGhee, Partner in Global Infrastructure Partners (GIP) said the company’s strategy is focused on a long-term horizon. GIP acquired London City Airport in 2006 and London-Gatwick in 2009. “We like large investments and we must have a controlling stake, as our whole investment mandate is about improvement,” he commented. “We obviously look at growth outlook and also improvement potential!”

With input from such a wide variety of industry players, and ever 200 delegates in attendance, the conference successfully addressed the key economic and financial trends impacting airports, as well as possible responses to these developments. In particular the event highlighted that air transport has become fundamental to social and economic development, but that challenges remain which must be addressed not only by the industry and its partners, but also by the wider regulatory framework.
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IONS AND EQUIPMENT FOR THE AIRPORT OF 2020
The collaboration between ACI EUROPE and EASA has evolved extremely well over the past years and the airport community can be confident that it has had sufficient input into the process. “It was, and still is, absolutely critical to involve the industry expertise in order to ensure flexibility and operational feasibility,” commented Ahrens. “We highly appreciate the cooperative approach EASA has taken in the whole Rulemaking Process so far.”

ACI EUROPE and individual airports have been formal contributors to the Rulemaking Process as members of the established Working Group. “The intention has been and still is to involve experts from industry and Member States to the fullest extent possible,” explained Kessler. “We are glad to see that the airport community has accepted this opportunity to contribute, and an intense, excellent level of cooperation and constant communication has been very encouraging for us. The airports are at the heart of the development, and there is plenty of evidence of the fruitfulness of this contribution. It is absolutely necessary!”

Airports always had three representatives in each of the three Rulemaking Groups, while the ACI EUROPE EASA Taskforce has been deeply involved in the Rulemaking Process and has provided its expertise to the representatives in the Rulemaking Groups. This has ensured proper involvement of the ACI EUROPE membership.

Small aerodromes represented

The scope of the future European rules will encompass most civil IFR (Instrument Flight Rules) airports, from global hubs to small airports serving marginal commercial traffic. “All involved actors, therefore, used great care to accommodate respective aspects by flexible, proportionate rules,” said Kessler. “The involvement of ERAC and case studies of some small airports, especially in France and Switzerland have been fairly instrumental in avoiding unintended, undue effects.”

Ahrens added that ERAC and operators such as Avinor and BAA, which also operate smaller aerodromes, were very helpful in sharing their experience and knowledge with regard to small aerodromes.

No major “sticking points”

As far as ACI EUROPE’s commonly agreed comments – covering the whole membership – on the Notice of Proposed Amendments (NPA) are concerned, it has not identified any “sticking point”. Ahrens said: “There is still room for
“ANTALYA AIRPORT, YOUR GATEWAY TO HEAVEN ON EARTH”
Ahrens: “There is still room for fine-tuning and getting things absolutely right, but this will be addressed through our NPA. Some regions in Europe might have some specific legal issues with their national legislations, which have to be addressed from their side individually.”

Kessler

“We are glad to see that the airport community has accepted this opportunity to contribute, and an intense, excellent level of cooperation and constant communication has been very encouraging for us. The airports are at the heart of the development, and there is plenty of evidence of the fruitfulness of this contribution. It is absolutely necessary!”

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Kessler explained that the delicate issues have been apparent from an early stage in the process: continuity, flexibility and light conversion mechanisms for airports also by possible acceptance of existing deviations. “These important, key coordinates have been given a lot of thought along the process and the feedback is encouraging. So, while there is still ample room to fine-tune and improve the proposed rules, we should have got the overall frame right and removed possible “sticking points” already,” he commented.

It was decided by all to base the proposed rules on “mature” ICAO text. Therefore, by and large, formally adopted ICAO material is being transposed, while in some areas “ready to be agreed” text has been taken.

While the NPA is a daunting 740+ pages, Kessler stated that huge effort has been made to highlight the most important, as well as the “new” elements, meaning the actual hard rules involve only around 65 pages. Ahrens added that “Most of the rules are familiar to our members since they are based on ICAO Annex 14 and other existing material – something we have always asked for since the beginning of the process.”

EASA proposes that for all existing infrastructure related deviations, not only for those filed to ICAO, the competent authorities can opt to have those sustained if found to be safe. “This element of flexibility is crucial,” commented Kessler.

This is something ACI EUROPE argued strongly for and Ahrens noted that a special task force of the EASA Aerodrome High Level Group tackled just this very important issue. “Provisions for this are currently in the NPA and we strongly support this, and I would like to encourage our whole membership to do so, too!” he said.

‘Harmonised level of safety’

EASA does not foresee potential geographical problems for implementation in certain Member States, as adequate room to address local specificities is given by the proposed rules. “Special solutions, which had been found acceptable by the authorities in the past, can be sustained and continuity is ensured,” stated Kessler.

In advance of the Rulemaking Process, EASA carried out a study to check which Member States apply ICAO Annex 14. The results indicated that a set of European Rules will be useful to ensure a unified level of safety in Europe. “Some States follow more than others and the new rules should help to have a harmonised level of safety in Europe for our customers, the passengers and airlines alike,” commented Ahrens.

Both Ahrens and Kessler stressed that airports will not have to be certified by EASA in the future – certification will be done by the National Aviation Authorities. From this point of view nothing will change for airports, except the rules the certification is based upon, which will differ a little due to the new set of EASA Rules.

Regarding the preparedness of National Authorities for the EASA Rules, the impact assessment has not revealed any stumbling blocks, but Kessler explained that the issue will be looked at again when additional light is shed on it via the ongoing consultation.

Ahrens said: “In the rulemaking discussions with the NAA’s, we could often find common ground and there should not be major ‘sticking points’. The EASA rules will feel like new rules – although they are based on existing material – and therefore we need to reduce the scepticism. It seems key for the successful certification process that Member States ensure sufficient staffing and do not cut jobs now – the completely wrong time to do so!”

Kessler foresees no problems or significant challenges with adoption of the rules from January 2014. “If we all do our job correctly, we will be looking at some level of due and reasonable adjustments, but no disruptions, and especially no significant economic burden. This should go for all affected airports, and it is exactly this spirit on which we need to base the project,” he asserted.

Ahrens added: “I believe we are on a good track with the EASA rules. It is a matter of the spirit with which we tackle the initial certification. The Basic Regulation is there, we need to make the best out of it – which we did so far – and should therefore be able to comply with the rules.”

Additionally, both Kessler and Ahrens are adamant that there will be no explosion in costs for European airports to cover the new set of rules.

The formal consultation period on the NPA will continue until end-April 2012. A review of the comments received will follow in the subsequent months, potentially again involving industry experts. A Comment Response Document (CRD) will then be published – again asking for formal comments. The formal EASA decision and opinion will be published in late-2012 and handed over to the European Commission for adoption. This adoption process, via comitology, is expected to take up to a year and will be complete by end-2013. The constant exchange and communication between EASA and the airport industry will continue. “Our members are eager to stay involved in the process and are more than happy to continue to exchange their expertise with EASA whenever needed in the process. It’s the best way to address all the possible concerns that airports may have,” concluded Ahrens.
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- TAV Ankara Esenboğa Airport
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JOHN HOLLAND-KAYE, Commercial Director, BAA

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The master plan for Ljubljana's expansion includes the construction of a new terminal facility, multi-modal logistics centre and airport rail link, reflecting Ljubljana's ambitions.

**LJUBLJANA AIRPORT’S EXPANSION PLANS REVISITED**

Major expansion works were planned at Ljubljana Airport when we last spoke to its CEO, Zmago Skobir, in 2008. With the economic climate in Europe changing significantly in the meantime, Airport Business revisits Ljubljana, host of the 5th ACI EUROPE Regional Airports’ Conference & Exhibition, to discover whether the market volatility has affected the airport’s ambitious plans. Magdalena Anna Fas reports.

**Following a pattern** well-known in fellow new accession EU countries, Slovenia has experienced a great deal of change in recent years. The country, which has the highest GDP per capita in the new EU, has been enjoying dynamic economic development, as well as improved access to European markets. “We have been able to gain positive effects out of it,” explained Skobir. “Competition existed in the past, but only now can the airport benefit from it on an unbiased basis.” With growth reaching double-digit figures and dated facilities, it proved only natural for the airport to make extensive plans for the future.

By early 2008, the most urgent investments were already commissioned and the airport gained a 1,300m taxiway extension, increasing its total length to 3,300m parallel to the runway, while the construction of two lanes connecting to the runway has nearly doubled its capacity to 25 hourly movements. In the face of increased traffic pressure, cargo handling equipment underwent modernisation and on the passenger side, a new terminal extension was opened. “The expansion of airport infrastructure is far from being over,” we were told by Skobir in 2008, who described airside and terminal improvements as “the first step towards Ljubljana’s goal of becoming the region’s leading airport in 2015.”

Notably, the master plan for Ljubljana’s expansion includes the construction of a new terminal facility, multi-modal logistics centre and airport rail link, clearly showing Ljubljana’s objectives. Based on pre-slowdown traffic projections, which envisaged 2.2 million yearly passengers by 2015, the plan’s key focus was on facilitating the growth and developing activities related to aviation and logistics. A new terminal, with a maximum hourly throughput of 1,700 passengers, was central to the project as it would provide Ljubljana with a
significantly improved service offering. This key investment was initially scheduled to start in the second half of 2008 and carried a €60 million price tag, and would have eventually provided additional terminal capacity of 2.5 million passengers per year. “Diminished courage of airlines to open new routes that comes with high fuel prices and consolidation requires us to be more patient,” said Skobir, adding “Our basic plans stay the same, but major investments have now been postponed for about five years.”

In particular, the improved passenger amenities are increasingly vital, as airports in neighbouring countries, notably Klagenfurt, Graz, Zagreb and Treviso, compete for largely similar business. Skobir calls the competition inexorable, but is quick to say, that “only Zagreb’s profile and network are similar to that of Ljubljana, while the remaining facilities mainly serve domestic traffic needs”.

At the moment, only one low-cost carrier operates at Ljubljana, and many Slovenians choose the nearby airports, particularly so Italy’s Treviso, which has become a Ryanair base. “Offering preferential rates doesn’t seem fair towards other airline customers and generated profits wouldn’t justify cutting fares across the board either,” said Skobir, concluding: “As a privately held company, it is extremely hard for us to attract low-cost carriers, once the price factor is ruled out.”

Market conditions push development back

As far as planning is concerned, the instability of Adria Airways presents the airport management with a much higher uncertainty level, than the wider economic picture in the EU or the airport’s popularity with budget carriers. In fact, the airport’s year-on-year net profits increased by a quarter in 2011, and as Skobir explained, “This happened as a result of higher occupancy rates at foreign carriers and increasingly larger aircraft.” But the physical volume of traffic was down by 2%, owing mainly to the closures of Adria’s unprofitable lines in the last quarter of 2011.

Most recently, the go-ahead for investments was delayed due to Adria’s financial troubles. The future of Slovenia’s flag carrier and the airport’s largest user remains an issue, even though the airline was offered a government bailout during autumn 2011. A strategic investor is now being sought by the government, but the optimism has been somewhat diluted by Malev’s recent demise. The airport operator has measures ready for the worst-case scenario, but Skobir is unwilling to elaborate on details. He concluded that a potential receivership would require certain short-term crisis management, but the airport “would restore 70% of the turnover within six to 12 months. Airport development would not stop, but change in time and partly in content.”

In spite of the setbacks, all signs now indicate that construction of the second terminal will eventually start in 2012, provided tenders are completed successfully. The construction of a cargo apron is also scheduled for 2013, and will be followed by a cargo terminal at a later stage. With an increasing amount of revenue coming from cargo operations, the prospect of upgrading cargo handling facilities seems particularly attractive. Over time, that should lead to the opening of the only state-of-the-art intermodal-logistics centre within a radius of 500 miles, notwithstanding potential foreign investors becoming more cautious about large-scale investments following the financial turmoil of recent years. “It is not the kind of project Aerodrom Ljubljana could revive alone,” underlined Skobir, reassuring that “the company lays its hopes in the engagement of the new Slovenian government in these ambitious projects of national importance.”

Adria Airways, Ljubljana’s largest customer, ended many unprofitable routes in 2011: “Domestic traffic is likely to decrease further in 2012, but foreign carriers are likely to drive traffic growth up,” commented Skobir.

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EU Regulation 1107/2006 has been in place since July 2008 to protect the rights of disabled persons and persons with reduced mobility (PRMs) and work is continually being done to enhance both the effectiveness of the Regulation and the quality of the service offered to PRMs. Ryan Ghee reports.

It is widely accepted that the adoption of Regulation 1107/2006 – under which airport managing bodies are responsible for the assistance on the ground – has led to improvements in the travel experience for PRMs.

In January this year, the service level offered to PRMs hit the news when a French court found easyJet guilty of discriminating against disabled passengers in three separate cases in 2008 and 2009. According to Guillaume Dufresne, Mobility and Transport Officer, European Disability Forum (EDF), this “represented an important landmark since the case was won by referring to Regulation 1107/2006”.

The European Commission now plans to publish ‘interpretative guidelines on the application of Regulation 1107/2006’ but Dufresne explained that the EDF has some concerns. “As currently worded, the guidelines might broaden the scope of the Regulation and extend the category of passenger protected by the Regulation,” he said. “The Commission must realise that this extension will not benefit the beneficiaries of the Regulation; it will create considerable operational difficulties for various parts of the aviation industry, and will be detrimental for persons with disabilities who would no longer be able to receive appropriate assistance.

“The goal of these interpretation guidelines is to improve the journey for 80 million Europeans with disabilities and the European institutions should keep focus on this objective. EDF believes this is the only way the guidelines will bring results.”

For its part, ACI EUROPE notes that since the entry into force of the Regulation, European airports have reported a steady growth in assistance requests. The aim of the interpretative guidelines should be to clarify and unequivocally define PRMs. The proposed guidelines appear to considerably broaden the range of passengers categorised as PRM, rather than attempting to clearly define it. This will – without any doubt – lead to a considerable increase in the usage of the services and to the potential for further abuse, increased costs of facilitating passengers who would have traditionally negotiated airports without seeking additional assistance. Moreover, this broadening would be to the detriment of real disabled persons and PRMs.

“Making progress

Since the PRM rules came in, European airports of all sizes have taken steps to ensure that adequate facilities are in place to cater for PRMs and the technology available continues to evolve. At London-Heathrow Airport, for instance, BAA and Omniserv are currently working on introducing a new product called the ‘Eagle’, which has been developed by Haycomp.

“The EU rulings have made an improvement to the travel experience of many PRMs,” said William Hay, Market Development Consultant, Haycomp. “Defining the responsibilities of the airlines and airports...”
JBT’S GROUND SUPPORT AND GATE EQUIPMENT

JBT AeroTech, Jetway Systems, is a global leader in the design and manufacture of cutting edge ground support equipment and airport gate equipment, featuring Jetway passenger boarding bridges, JetPower 400 Hz ground power units, JetAire preconditioned air units, JetFlo potable water cabinets, BagBuddy luggage lift, Apron Management Systems (a management tool for asset management, maintenance and billing), and many more products and services.

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Innovative solution

Haycomp has first-hand experience of working with airlines and airports to improve PRM services and having developed the Eagle hoist following consultation with Qantas, Air New Zealand and Air Canada also now utilise Eagles, while WestJet will soon adopt them.

The contract at London-Heathrow is significant as it is the first major airport in Europe to make use of the Eagle. “We also have strong interest and trials currently ongoing at Paris Charles de Gaulle Airport,” Hay said. One of the main benefits of the product, he outlined, is that the Eagle only ever needs two operators at any time, therefore reducing any issues concerning resources. It also eliminates the risk of poor manual handling, which can deter PRMs from flying.

While the development of innovative solutions such as the Eagle hoist and the frequent review of the relevant legislation helps to ensure that progress is being made, Hay said that there is still room for improvement within the industry. Supporting the findings of the recent review, he said: “There is still work to do on the issues of handling full assistance PRMs. There is a case for working with ACI EUROPE, IATA and other stakeholders to define the needs of these special passengers, so the service providers know what equipment, staff and seating is required to board them and equally importantly, that they get accurate and timely information about PRMs on incoming flights.”

Following its own study into the effectiveness of the current PRM regulation and full consultation with stakeholders, the European Commission is due to publish its interpretative guidelines regarding services to PRMs before the summer.

The European Commission will soon publish ‘Guidelines for Regulation 1107/2006’ which will be aimed at further improving the level of service offered to passengers with reduced mobility.

has made matters clearer.” While he explained that suggested changes to the resolution of complaints would allow for further improvement, he also said that “there still appears to be differences in the attitude of some airlines to the rulings.”

One key point, he said, is that airlines still need to do more to make air travel accessible to quadriplegic passengers. Although airports have already made moves to install disabled parking, disabled toilets, and ramps, now steps need to be taken to ensure that the same happens with regard to access to the aircraft.
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UMDASCH AWARDED DUBAI T3 CONTRACT

The contract for the shopfitting of the new shopping landscape at Dubai Airport’s Terminal 3 has been awarded to Umdasch Shopfitting. Extending over 10,000sqm, the shopping area will offer the best of international brands and local specialities.

Some of the furnishings to be used in the facility will be supplied by the Umdasch Shopfitting Middle East production facility in Dubai. The project will be completed by September 2012 in cooperation with the main contractor Al Jaber Dubai (ALEC), which was awarded the overall contract. The shopping area will include a full array of travel retail products, including perfumes and cosmetics, liquor and tobacco, watches and jewellery, local gifts and fashion.

In recent years, Umdasch Shopfitting, which has its headquarters in Amstetten in Austria, has executed some major projects, including the premiere of the new Heinemann presentation at Hamburg Airport, as well as installations in Zurich, Dublin Terminal 2, Larnaca, Istanbul and Abu Dhabi.
The Sleepbox — manufactured by Arch Group — is designed to provide travellers with somewhere to sleep if they have a long wait for their flight, while also providing an additional revenue source for airport operators.

Available in various sizes — single, double or triple berths — the Sleepbox can be individually designed and manufactured to bespoke specifications. Passengers are charged to use the facility, which is fully air-conditioned, offers Wi-Fi and fixed internet access, travel information facilities and an optional television.

Last year, Sheremetyevo International Airport in Moscow became the first airport in Europe to introduce the new Sleepbox, which can be rented by passengers who are waiting for their flight in the terminal building. The first Sleepbox was installed in the Aeroexpress Terminal in August and can be rented for anywhere between 30 minutes and several hours.

For airport operators, the Sleepbox offers a much-needed service for passengers, while extra revenue can be generated from space that is not otherwise usable. For airlines, it offers frequent flyers an opportunity to relax, re-energise and work in a private booth, while also helping to improve brand presence in the airport.

The Sleepbox has already been installed at Sheremetyevo International Airport in Moscow.

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Car Parks DAA is a team of professional experts with a record in operational excellence and revenue maximisation skills. Airports across the globe can access this proven expertise in two ways. Those wishing to run their own car parking operation can avail of the company’s unrivalled consultancy service. Or they can ask the company to manage the operation directly under a concession arrangement. Car Parks DAA is a trading division of Dublin Airport Authority plc, a company with 75 years experience in international airport management and which employs over 2,500 people. Through its subsidiary ARI, it is a world leader in airport retailing. DAA has commercial interests in the UK, USA, Russia, Canada, Egypt, Oman, Cyprus, Ukraine, India and China and offers consultancy services to airports internationally.
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As part of the ongoing development of the commercial facilities at Oslo Airport, the brand new Heinemann Travel Value Fashion Shop was opened in the International Pier in February. The 230sqm store boasts a range of exciting brands, including the likes of Ray Ban, Oakley, Armani, Swarovski and Tommy Hilfiger. The Heinemann Travel Value Fashion Shop uses three promotional areas to display seasonal products. For example, the opening weeks were focused on outdoor products, with promotions for Helly Hansen jackets, shoes and sweatshirts, while in the spring, the Drykorn and Belstaff brands are presenting the highlights from their latest collections.

Håkon Fjeld-Hansen, CEO of shop operator Travel retail Norway, is pleased with the store’s good start: “We are proud to open the first Heinemann Travel Value Fashion Shop in Norway. It will contribute to the company’s further development, and we will have even more opportunities for expansion in the future.”

Travel Retail Norway has been active at Oslo-Gardermoen, Bergen, Kristiansand, Stavanger and Trondheim airports since 2004. The company, headquartered at Oslo-Gardermoen Airport, operates a total of six Tax & Duty Free shops and now three Travel Value shops and employs around 700 employees.

Travel retail Norway is a joint venture between German family-owned company Gebr. Heinemann – a major player in the global travel retail market – and Norwegian firm Validus.

As the T2 development advances at Oslo Airport – host of the 21st ACI EUROPE Airport Trading Conference & Exhibition, 23-25 April – a significant focus is being placed on the commercial prospects that will be presented as a result of the terminal’s expansion. Ryan Ghee discussed the commercial strategy with Espen Ettre, Director Property & Commercial Development, Oslo Airport.

Upon completion of the terminal extension in 2017, the floorspace dedicated to commercial activities at Oslo Airport will be more than doubled to 28,000sqm. The project, which is branded T2, will offer a timely capacity increase. The airport is currently designed to handle 17 million annual passengers, but throughput reached 21 million in 2011 and this number is expected to increase further this year.

“In terms of capacity, it is starting to get tight. We do still have enough space to handle these numbers, but there’s not enough space in the existing terminal to develop the commercial facilities,” Ettre explained. “One of the tasks in the planning of T2 is to increase the airport’s commercial activities and to considerably increase the space.”

One of the core benefits of the addition of T2 from a retail perspective is that all passengers will still be processed under a single roof, therefore maximising potential footfall for each of the retailers. As well as creating “more efficient shopping areas”, Ettre explained that the one terminal concept “is also more efficient overall for the passengers and the airlines.”

Early interest
As the opening of T2 is still five years away, the tender process will not commence until 2015, but Ettre explained that a strong level of interest has already been expressed from various commercial parties. He said: “The operators that are already here, the likes of Heinemann and SSP, are very keen to continue their business at the airport and other international and local retail and food and beverage brands have shown an interest.”

Such interest is hardly surprising, as Oslo Airport invests a great amount of energy in ensuring that its relationship with each of the retailers remains strong. “We always try to work hard together with the operators,” Ettre explained. This is highlighted by the fact that the airport has a specific team dedicated to working with the operators on establishing common marketing and a common approach to encourage passenger spend. A smartphone
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app has also been developed for passengers, including a retail feature that highlights specific products and special offers that can be found in the duty free stores.

**SSP’s new Oslo outlets open**

Visitors to this year’s ACI EUROPE Airport Trading Conference and Exhibition will be among the first to be able to visit SSP’s newly opened cafés and restaurants at Oslo Airport.

Le Grand Comptoir is the first à la carte restaurant at the airport, and offers a range of French classic dishes. Among the specialties prepared by talented young chef Christer Rødset and his team are bouillabaisse flavoured with saffron and star anise, and slow-cooked lamb shank. A ten-minute serving guarantee on selected dishes means that passengers with limited time can enjoy the highest quality food, without having to worry about missing their flight.

A landmark in the terminal, the new YO! Sushi outlet brings passengers all the excitement of the authentic Japanese sushi bar. Colourful plates of food are displayed on a traditional ‘kaiten’ conveyor belt, and those who have little time can quickly select a dish of sashimi or nigiri, while those who want a hot meal can choose chicken katsu curry, prawn tempura, or vegetable firecracker rice among other dishes prepared freshly in the on-site kitchen.

T1 upgrades

While the commercial benefits of T2 will be realised in 2017 and beyond, the existing commercial facilities in Terminal 1 are constantly being upgraded. “We’re continuing to develop the walkthrough duty free in both arrivals and departures,” Etre said. “Because of the tax level domestically in Norway, we give a high priority to duty free as that’s what the passenger wants. Of course, Norway is not a member of the European Union, so we can offer duty free sales for passengers travelling to all destinations, which is why Norwegian travellers tend to be very interested in duty free goods in the airport.”

Although the addition of the new retail space is still five years away, the continued development of existing commercial facilities and the eagerness of passengers to make the most of the duty free products will ensure that Oslo Airport’s commercial income continues to be boosted in the near term.

The new Starbucks, which is the first in Norway, has been attracting considerable attention since its planned arrival was announced last autumn. The new coffee shop has proven popular with passengers and staff at the airport, as well as attracting a new following of customers visiting the terminal specifically to enjoy ‘the Starbucks experience’. All three of the new brands are trading at least 50% above target.

Upper Crust was already a firm favourite at the terminal – bread is a key part of the diet in Norway, and the bakery brand has always had a loyal following at Oslo Airport. The new interpretation of the brand is also trading strongly, with sales growth in double digits.

These new openings are part of a major renovation project, which is expected to be completed by the end of this year. The new openings follow the signing of an agreement last summer which awarded SSP a five-year contract to operate 30 outlets across the terminal. The deal has been described as the largest in the airport food and beverage sector.
Brand new and yet familiar

An airport should feel like you’re coming home. You should know where everything is, it should be modern, efficient and no waiting in queues. Avinor is now investing heavily in the further development of Norway’s major airports. Not just to meet tomorrow’s demands for efficiency and comfort, but also to create a space people enjoy.
AVINOR EXPERIENCING RECORD GROWTH

Last year proved to be a record-breaking year for Avinor with more than 44 million passengers travelling through its 46 Norwegian airports – an increase of 4 million on 2010 and the highest number to date. The largest airport in the portfolio, Oslo Airport, accounted for 21 million passengers, but Trondheim and Stavanger airports were among the fastest-growing. Ryan Ghee reports.

**Trondheim Airport, Værnes**

On the back of 12 consecutive months of passenger growth in 2011, Trondheim Airport is currently expanding both the international and domestic terminals.

In 2011, the airport handled just short of 4 million passengers – up from 3.5 million in 2010 – and international traffic in particular enjoyed a sharp rise of 19.6%. “There has been a significant increase in the number of international routes over the last few years,” said Lasse Bardal, Airport Manager. In total, 36 international destinations are served from Trondheim, in addition to 19 domestic routes.

The airport in its current guise is designed to handle 3.6 million passengers, so to cater for the additional numbers, measures have been undertaken to expand the space available. Last summer, for instance, a temporary terminal was constructed to increase the non-Schengen hall during the peak period.

A number of permanent developments are also taking place across the airport and the departure hall expansion in the international terminal is scheduled for completion on 1 May. Meanwhile, upgrades to the baggage handling system and an extension to the domestic terminal should be ready for summer 2013. This project includes an increased check-in and security area, increased commercial areas and the addition of new shops and restaurants, and three new airbridges. Six new Code C aircraft stands and a brand new commuter terminal for domestic turboprops will also be complete in 2013.

Following the substantial growth experienced at Trondheim Airport in recent years, ambitious targets have been set for the next three years. Bardal explained that one of these aims is to be the best Norwegian airport from an environmental perspective, while another is to achieve throughput of a “minimum of 1 million international passengers”. When this goal was set in 2010, 520,000 international passengers passed through the airport, rising to 720,000 in 2011. Trondheim also aims to offer the best passenger experience among all major Norwegian airports by 2015.

In order to build on the recent success, the management is currently working closely with politicians and
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commercial managers in the district to ensure that Trondheim Airport fulfills its potential.

Bardal said: “We are convinced that an effective, international airport with a broad range of destinations and schedules adapted to the needs of the district is vital to develop strong business and industry environments, a strong travel industry and a district that is attractive to live in.” On this front, looking further to the future, the airport’s master plan outlines plans for an airport city, including development of the surrounding road and rail infrastructure.

Stavanger Airport, Sola

Stavanger Airport has also enjoyed significant passenger growth of late, but a key difference to Trondheim Airport is that it has been driven largely by business traffic. Total passenger numbers climbed from just over 3.6 million in 2010 to 4.1 million in 2011, and business passengers accounted for 53% of this number.

Over the next three years, annual throughput is expected to increase by 8.5% before slowing slightly to around 4% per year from 2015. “Due to the considerable growth in passengers over the last few years, Stavanger Airport has identified the need to upgrade the capacity in several areas,” said Airport Manager Leif Lorentzen.

This year, the security control zone will be enlarged by approximately 80%, while the airside retail and food and beverage offering will also be refurbished. A restaurant and bar has recently opened and a brand new duty free shop will open in June. In the domestic departures hall, a new kiosk was introduced in March, while a coffee bar and full-service restaurant and bar with views of the airfield will be unveiled in the summer.

Lorentzen said: “As the business climate within our industry gets tougher, and the airlines’ profits are challenged, we realise that our future revenues will have to come from commercial activities, rather than airport fees.”

Upgrades to the airbridges and the introduction of a new lounge will also take place before the end of 2013.

“We are continuously developing new services and products in order to secure a positive experience for our passengers, while at the same time securing an efficient and state-of-the-art infrastructure for our partners,” Lorentzen added.

“Our vision is to make the journey a little simpler for passengers and partners. Attractive services and products will be of vital importance to meet future industry needs and our financing will to a great extent come from commercial revenues.”

Due to its reliance on business travellers, Stavanger Airport will continue to focus on developing its route network with an emphasis on providing links to destinations that will help contribute to the growth and success of businesses in the region. “That said, we also focus on routes with solid potential for incoming tourism,” Lorentzen said.

With all of these developments ongoing, the overriding ambition is to provide a “seamless and pleasant travel experience” for all passengers, but driving the economic development of the wider region is also high on the list of priorities.
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Having started the trial of its innovative automatic baggage drop off system at Paris-Orly Airport in November, Aéroports de Paris (AdP) is now preparing to introduce the self-service solution on a permanent basis. Ryan Ghee spoke to Sébastien Pichereau, Senior Manager – Airport Capacity Development, AdP.

The trend of self-service in the airport environment is continuing to gather pace and while automatic check-in and boarding processes are becoming increasingly popular, airports are also exploring how baggage processing can be further automated to improve efficiency.

In this area, Aéroports de Paris has emerged as one of the most innovative airport operators and since November it has been trialling an automatic baggage drop off solution that was developed in-house and implemented at Paris-Orly Airport’s Terminal Ouest.

The system is designed to empower the passenger and make the bag drop process as simple as possible. Once the passenger has checked-in and printed their boarding pass and bag tags, they can proceed to the automated baggage area. Then they simply have to scan their boarding pass and insert their baggage into the machine. The passenger’s name and the weight of the bag are then verified and a baggage receipt is automatically printed. Within 30 seconds, the bag is checked-in before being inspected and secured on its way to the aircraft hold.

“In the first three months, the machine processed around 15,000 bags,” Pichereau said. “We recently undertook a passenger survey and 99% of passengers were satisfied. Also, it’s working well for the airlines and the operating agents are very happy with the performance.”

Two-step process

For an airport considering the implementation of a self-service bag drop system, one of the key considerations is to decide whether to opt for a one- or two-step process. The former entails the tagging and deposit of the baggage in a single transaction, while the latter requires the baggage to be tagged in one location and then dropped off at a separate area.

“We went for the two-step process,” Pichereau explained. “When we were thinking about the product, firstly there was the IATA (International Air Transport Association) recommendation for the two-step process. Also, at AdP, we think the passenger should spend as little time as possible at the drop off point as this is a capacity bottleneck.”

He continued: “When we started to look at this process in 2009, there was no product based on the two-step process on the market at that time. Also, in 2009, we launched an innovation process within AdP and with a dedicated team, we decided that we would develop this product ourselves for our own needs.”

Among the key aims, Pichereau explained, was to ensure that the product was easy to use for the passenger, while also optimising passenger throughput for the airport. It also had to satisfy European Union and French security regulations. Having successfully satisfied these criteria, the focus is now on expanding the presence of the automatic baggage drop off system.

“The trial ends in May and we then plan to deploy this machine in other terminals,” Pichereau said. “Firstly, we’ll deploy it across Paris-Orly as we need to deploy several machines to get an idea of the throughput we can deal with.” Once this has been completed, the next stage will be to introduce the system to Paris-Charles de Gaulle Airport.
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DSG Systems' baggage drop solution is delivered in modules that improve flexibility during installation and maintenance.

DSG Systems has developed a fully automated baggage drop that simplifies and streamlines the process of checking-in.

The baggage drop solution is delivered in modules that improve flexibility during installation and maintenance. The solution is fully customisable to meet design and regulatory requirements while maximising usability and safety.

The efficiency of the solution is improved by minimising the need for check-in personnel to do routine tasks. Automatically verifying the baggage tag, dimensions and weight improves the quality of the check-in process. Check-in statistical and status information is provided continually to improve the process. DSG Systems' vast experience in baggage handling systems allows it to integrate the solution in existing and new terminals, and provide innovations with the use of available technology.

Airports face a number of challenges, including coping with a continuous increase in passengers; overcoming terminal expansion limitations; reducing operational costs; and improving the passenger experience. The key benefits of the DSG Systems baggage drop solution include increased efficiency of the check-in area by improving the capacity of the passengers to self-check-in, and a reduction in operating costs by minimising the need for check-in staff for routine tasks.

TERMINAL CAPACITY PLANNING WITH PAX2SIM

Having spent many years helping to optimise baggage handling systems for airports such as Athens International Airport, Paris CDG and Delhi T3, SIMCORE AIRPORT Division has been renamed HUB Performance and has developed the easy-to-use passenger terminal capacity planning software, PAX2SIM. The software has been successfully applied at London Heathrow for the T2 Eastern Campus project and has also been implemented at Aeroporti di Roma for the third year.

PAX2SIM provides a better way of planning and forecasting needs, offering advanced simulation software to calculate traffic and forecasts. This is part of HUB Performance’s Terminal Smart Planning concept.

PAX2SIM can be used to size new projects and specify the space needed based on standards and capacity constraints. It can also be used to plan and optimise existing operations.

HUB Performance’s close relationship with the firm Blue Eye Video has also allowed the company to integrate real-time reports into PAX2SIM to compare forecasts with real-time performance measurement to further improve planning.
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The acquisition of 38% of TAV Airports Holding by Aéroports de Paris Management – which was announced on 11 March – proves that investment in European airports is by no means at a standstill. The investment by the wholly owned subsidiary of Aéroports de Paris (AdP) totals $874 million (€666 million) and values TAV Airports Holding’s equity at $2.3 billion (€1.75 billion).

The partnership will see the creation of an alliance that will manage 37 airports, which account for as many as 180 million annual passengers.

Pierre Graff, Chairman and CEO, AdP, said: “The partnership with TAV is a major strategic investment for Aéroports de Paris group. Fully in line with our international strategy, this transaction will have a strong positive impact on the group’s performance. This combination will become a leading worldwide airport operator group, with a long lasting growth perspective.”

He continued: “Not only the geographic proximity but also the cultural and business model proximity of both companies will ease future development plans, in particular in new airports investment opportunities.”

Aena postpones concession process
While the TAV Airports Holding/ AdP partnership highlights the positivity that does exist in terms of airport investment, the Aena case study probably best highlights the impact that the financial uncertainty is having in general. When the new Aena Aeropuertos S.A. division became operational in June last year, its remit was to begin a process of market sounding to look for institutional investors, with the privatisation of the management of Madrid-Barajas and Barcelona El Prat airports on a concession basis identified as a suitable way to raise revenue.

Since then, however, the concession process has been reversed. The Spanish government has publicly announced that the priority is to reinforce Aena Aeropuertos’ network position as a whole, and both airports are essential assets of this network.

The government is now analysing the best way to optimise Aena Aeropuertos’ position to establish its future management model. Although the creation of Aena Aeropuertos and the modernisation of the management structure are still expected to increase the overall value of the company, this is now part of a longer-term strategy.

BAA appeals London-Stansted sale
Meanwhile, BAA has announced that it has initiated appeal proceedings against the Competition Appeal Tribunal’s judgement, which found in favour of the Competition Commission’s decision that required the airport operator to sell London-Stansted Airport. The initial decision also outlined a requirement for BAA to sell off either Edinburgh or Glasgow airport. BAA opted to sell Edinburgh, but pushed back on the London-Stansted decision, stating that: “BAA believes that the judgement is flawed and is seeking to appeal.”

The sale of the two airports relates to the ruling that “passengers and airlines would still benefit from greater competition”. However, this is something that has been strongly refuted by BAA.

Colin Matthews, BAA’s Chief Executive, said: “We believe the south east airports market has changed and BAA has changed since the Competition Commission’s 2009 decision. It is also clearer now than it has ever been that Heathrow and Stansted serve different markets.”

So, as the sale process for Edinburgh airport gets underway, BAA’s battle against the sale of London-Stansted shows no signs of subsiding.
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Growth needs experts
POLAND AND UKRAINE HEAD INTO THE FINAL STRAIGHT FOR EURO 2012 PREPARATIONS

Only weeks away from the kick-off, UEFA’s Michel Platini is confident that EURO 2012 will turn into a considerable success, and describes preparations as 95% ready. With a number of opening ceremonies yet to be performed, Airport Business investigates the progress of airport investments in both countries. Magdalena Anna Fas reports.

EURO 2012 will be special in more than one way, as UEFA’s choice of hosts takes the event as far east as ever before. This 2007 decision has resulted in plentiful concerns with regard to the timely completion of key infrastructure investments, as both countries embraced what could be described as a major investment undertaking.

With the benefit of hindsight, Martin Kallen, UEFA’s Operations Director for EURO 2012, remarks: “It will be a different EURO. On the football side, we want it to be on the same level or a little better than Austria-Switzerland in 2008. But it will never be on the same level in terms of transport.”

The level of infrastructure investment employed by the two countries has been rarely seen in their history, a fact noted by Ukrainian Infrastructure Minister Borys Kolesnikov: “Ukraine has got four new airports with three new runways, and it has also prepared four stadiums. We have accomplished this actually within 18 months. No-one in Europe has experience of this kind.” Although delays caused UEFA more than a handful of sleepless nights, it is difficult to disagree, as both countries managed to lift their airport infrastructure to international standards within very tight schedules.

Poland

Out of the two countries, Poland was widely considered to be in a more favourable starting position in terms of infrastructure preparedness. The air traffic boom of the mid-2000s had previously put considerable pressure on the country’s airport capacity, as passenger figures soared by 117% between 2004 and 2007. Most of this growth occurred in regional airports, forcing authorities to plan for wide-ranging upgrades of the existing limited facilities.

All four airports, which directly serve the Polish host cities of Gdansk, Poznan, Warsaw and Wroclaw, have embraced extensive expansion plans. A further four were designated as auxiliary, including airports in Katowice, Lodz, Zielona Gora and Bydgoszcz, while Krakow Airport will be treated as a main airport, despite the city not hosting any games; upgrades are occurring in all of these locations. Poland will also see Warsaw Modlin Airport open before the championship; facilities in Lublin and Gdynia won’t be completed until after the tournament, despite the original plans. “It is only natural that the main airports remain in the limelight, but all airports, both main and auxiliary, have been involved at all stages,” explained Rafal Markiewicz, National Coordinator for Airports within PL2012 – the Polish EURO 2012 coordinating body.

Warsaw Chopin Airport, Poland’s busiest facility and the hub airport for LOT Polish Airlines, has seen a traffic increase of 30% in last decade. Unlike other facilities in the country, Chopin Airport required only minor improvements to accommodate the 30,000-strong passenger influx it expects on 8 June, when the opening match takes place. With major airfield and terminal upgrades already finished, the airport is awaiting completion of a rail link to downtown Warsaw. The project, managed by the Polish Rail Enterprise, had encountered numerous obstacles and its timely execution remains one of the biggest questions. Michał Marzec, Director PPL Polish Airports State Enterprise, commented: “All investments require temporary sacrifices; we trust that the missing rail link will be finished on time, but have relevant contingency plans on standby.” Chopin Airport’s expansion plans extend beyond the games, as the refurbishment of Terminal 1 and its synchronisation with other facilities is planned to begin in the summer.

Amongst regional airports, Wroclaw Airport had its new terminal commissioned on 29 February. Completion of works in Gdansk is scheduled for April, while the new arrivals building in Poznan will become operational in time for EURO 2012, although its full integration with existing facilities is not expected until later in the year. “We
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are confident that facilities in both Gdansk and Poznan will be up and running with time to spare. Unlike other transport investments, the progress made by airports is very positive and something to be proud of,” underlined Marczewski.

Ukraine

Unlike its neighbour, Ukraine had not experienced a boom in air traffic, although the growth was considerable, even if focused on the country’s capital. In this context, a strong sense of achievement shouldn’t surprise, in spite of apparent setbacks: “We have not collapsed into the abyss of economic disaster,” said Mykola Azarov, Prime Minister of Ukraine, who considers “the feeling that something can be done as one of the most important lessons drawn from EURO 2012.” And he might be on to something, as Ukraine had not built a single new airport since it pronounced independence in 1991, until the impending kick-off date brought about the pressure to deliver.

Ukraine’s largest airport, Boryspil, currently holds a 65% share of all air traffic at country level and remains the only one to receive intercontinental flights. In line with UEFA’s requirements, the airport had to upgrade its hourly capacity of 1,840 passengers to 4,150, or more than twofold. Modernisation plans envisaged expansion to five terminals, including brand new Terminals D and F, with rush hour capacity of 6,250 hourly passengers, leaving a significant error margin on UEFA’s requirements. Terminal F opened on 21 September 2010, while the construction of Terminal D, a large facility dedicated to international services, is running behind the official schedule; it entered the testing phase in January and a soft opening is now scheduled for 25 March. The aged, 1960s Terminal B is currently undergoing final upgrades. A fifth building, Terminal E, is not due for completion until 2015.

In Lviv, the new terminal building is now complete, although other improvement works are still ongoing and Borys Kolesnikov assures, that “the new airport in Lviv will start at the end of March”. This might not be entirely on schedule, but is a light in the long tunnel of upgrades undertaken at Lviv since 2009, including runway and tarmac extensions, refurbishment of the existing terminal building, as well as the construction of temporary terminals for the duration of EURO 2012. Traffic at Lviv Airport shrank by nearly 50%, as tight operational restrictions were put in place to facilitate the works.

Kharkov’s new terminal was commissioned in September 2010, and was part of a comprehensive upgrade project undertaken as a public-private partnership, a form of funding that failed to attract attention in Poland, but proved very successful in Ukraine. The project consisted of two main components; airport complex development financed by a private investor and state-financed airfield upgrades, and carried an approximate price tag of $200 million (€150m). The 20,000sqm facility was designed by Airport Research Centre, a German
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engineering consultancy, which had previously been in charge of the master plan for Berlin Brandenburg International Airport. The Low Cost High Quality terminal design applied in Kharkov makes extensive use of modular pallets, offering great functionality and flexibility. Together with double runway operation, the facility should comfortably handle 2,550 passengers per hour as stipulated by UEFA—a vast improvement on the maximum throughput of 100 passengers per hour to begin with. “Kharkov is an example of effective cooperation of the state and private business,” said Kolesnikov.

Donetsk International Airport has long been one of UEFA’s main worries, whereby a number of domestic companies, including Atkomm, Sreda and Ukraeroport Institute, have been working on completing the terminal since 2007. A new terminal and control tower, as well as a 4km long runway are now in the final stage of testing and, once commissioned, they will increase the airport’s capacity several-fold, making it the country’s second largest facility.

**ATC Management**

Regardless of their scale, infrastructure investments alone would not suffice. In Poland, preliminary impact analysis set additional traffic at one million passengers, spread over the duration of the games; in mid-March however, PL.2012’s National Coordinator for Airports, adding that “ACL has now received most slot applications, but more are expected, notably so from Russian carriers.” Against expectations, Warsaw has been overtaken by airports in Gdansk and Poznan in terms of airline appeal; this however, is “a direct outcome of group allocation with travel preferences varying by the origin country”, said Marczewski.

For its part, Ukraine will introduce ‘open sky’ conditions in order to facilitate air access for football fans. “All airlines will be free to fly to Ukraine and more than 200 nationalities are expected,” said Kolesnikov; in fact, the special conditions will apply from as early as 15 May, and talks are being held with airlines aiming at maximum utilisation of the two-month grace period. Only Kiev Boryspil Airport is slot-coordinated on a day-to-day basis, but UKSATSE (Ukrainian State Air Traffic Service Enterprise) will extend its services to other facilities for the duration of the games.

**Making history together**

EURO has only ever been co-hosted by two countries twice, and both Poland and Ukraine wanted to use it not only as a marketing opportunity, but also to improve links between each other. With respect to air transportation, cooperation took place largely within the structures of EUROCONTROL, of which both countries are members. In terms of infrastructure on the ground, the neighbouring countries were keen on joint coordination of efforts, under UEFA’s supervision.

As the preparations progressed, however, “both sides had to focus on wrapping all projects up, and you could say that the early stages fostered more cooperation, as they involved a great deal of planning. Now it’s time to deliver”, said Marczewski.

The airports are widely considered to be a secure long-term investment regardless of the source of funding, and one that has been long overdue in both host countries. Taking into account the magnitude of upgrade works, they might well prove to be the most important aspect of the championship’s legacy.
The European Travel Retail Council (ETRC) has launched an Alcohol Code of Conduct to promote the responsible consumption of alcohol, and to safeguard and demonstrate the responsible and ethical behaviour of all relevant business operators in duty free and travel retail. Erik Juul-Mortensen, Vice President, ETRC, and President of the Tax Free World Association (TFWA), outlined the strategy to Ross Falconer.

Juul-Mortensen

“Duty free and travel retail is a unique sales channel with a number of different challenges from those in the domestic market and, therefore, it was felt essential for the industry to have its own Code of Conduct reflecting the uniqueness of the sales channel, but built on these successful initiatives to promote responsible consumption of alcohol.”

**ETRC ALCOHOL CODE OF CONDUCT SIGNALS COMMITMENT TO RESPONSIBLE RETAILING**

Several EU countries are currently considering the implementation of stricter conditions regarding the taxation, marketing, promotion and labelling of alcohol products to combat the harmful use of alcohol. The ETRC is carefully monitoring the development of some policies which could have a disproportionate effect upon duty free and travel retail sales if they don’t take into account the specificities of the channel, such as restricted sales hours, minimum pricing and labelling schemes.

In recent years, retailers, alcohol manufacturers and industry associations have developed and implemented a series of voluntary codes and guidelines governing the responsible sale, promotion, marketing and advertising of alcohol products. “Duty free and travel retail is a unique sales channel with a number of different challenges from those in the domestic market and, therefore, it was felt essential for the industry to have its own Code of Conduct reflecting the uniqueness of the sales channel, but built on these successful initiatives to promote responsible consumption of alcohol,” explained Juul-Mortensen.

**In practical terms, the ETRC’s Alcohol Code of Conduct establishes a set of working principles that reflect the unique circumstances of this distinct, transparent and highly regulated environment — in particular where these circumstances differ from those of the European domestic market.**

“...it is important to add, I believe, that the Code of Conduct is intended to work alongside all existing codes or guidelines, and it is designed to be consistent and complementary to other such codes introduced by individual alcohol manufacturing companies and others.”

This decision is also part of a broader ongoing engagement with the EU institutions. The ETRC joined the European Alcohol and Health Forum in October 2011 to be recognised as a proactive and constructive contributor to the European alcohol policy debate. It intends to table the Code of...
Conduct at this Forum at its April 2012 Plenary session as its initial commitment to activities aimed at reducing the harmful effects of alcohol.

Ensuring a tailored retail environment
The ETRC Code of Conduct, which was officially launched on 26 January, is designed to be adopted and implemented by the full spectrum of industry players active in this retail space. All ETRC members involved in the retail sale of alcohol are obliged to adhere to the Code.

“ETRC will endeavour to ensure observation of the Code throughout its members’ companies. In the event of a complaint about or observation of non-compliance by a signatory company, ETRC will take necessary steps to investigate and to seek to rectify the problem with the companies concerned,” commented Juul-Mortensen.

In practical terms, the Code establishes a set of working principles that reflect the unique circumstances of this distinct, transparent and highly regulated environment – in particular where these circumstances differ from those of the European domestic market. The Code provides guidelines in terms of commercial and in-store communications, staff training and conduct of sampling and testing.

Juul-Mortensen said: “The Code of Conduct seeks to ensure a retail environment that is both tailored to duty free and travel retail’s international customer base and capable of showcasing Europe’s alcohol-producing heritage, demonstrating the premium quality of the products available while at the same time promoting a message about their responsible consumption by adults.”

Cooperation with APTRA
The ETRC cooperated closely on the initiative with the Asia Pacific Travel Retail Association (APTRA), which simultaneously launched its own Alcohol Code of Conduct. In essence, the ETRC and APTRA Codes are very similar in seeking to ensure that retailers and producers do not encourage excessive consumption or misuse of alcohol in the duty free and travel retail channel. The two Codes were developed to respect the differences between the Asia-Pacific and the European markets in terms of regulatory requirements and cultural heritage regarding the consumption of alcohol.

“APTRA’s decision to launch a Self-regulatory Code of Conduct is driven by the will to demonstrate that the duty free and travel retail industry in the Asia-Pacific region is united in its desire to promote responsible retailing. Furthermore, in the absence of an EU-style regulatory body in the region, it is all the more important to establish an industry-wide position on important issues such as responsible retailing and responsible drinking,” explained Juul-Mortensen. “APTRA’s representation of both retailers and liquor manufacturers, among other stakeholders, enables the industry in Asia-Pacific to speak with one voice to non-governmental and governmental institutions throughout the region.”

The ETRC’s decision to launch an Alcohol Code of Conduct is part of a broader ongoing engagement with the EU institutions – notably its recent membership of the European Alcohol and Health Forum – and demonstrates that the industry is committed to introducing innovative industry practices to promote responsible retailing. It sends a strong signal of ETRC’s social engagement with its partners, and reflects its commitment to representing the interests of the duty free and travel retail industry.
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