INTERVIEW

Thomas Woldbye, CEO, Copenhagen Airports

CRUNCH TIME

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Airports Council International
European Region, 6 Square de Meeûs, B-1000 Brussels, Belgium

Director General
Olivier Jankovec
Tel: +32 (0)2 552 09 72
Fax: +32 (0)2 519 26 42
e-mail: olivier.jankovec@aci-europe.org

Director: Media & Communications
Robert O’Meara
Tel: +32 (0)2 552 09 82
Fax: +32 (0)2 502 56 37
e-mail: robert.omeara@aci-europe.org

Director: Membership Services & Events
Danielle Michel
Tel: +32 (0)2 552 09 78
Fax: +32 (0)2 502 56 37
e-mail: danielle.michel@aci-europe.org

Magazine staff

Editor
Ross Falconer
Deputy Editor
Amy Hanna
Head Designer
Richard Jende
Designer
Victoria Wilkinson
Photography
Grant Pritchard
Sales Director
Jenny Rayner
General Manager - Association Business
Paul Sweeney
Managing Director
Paul J. Hogan

PPS Publications Ltd
Sa Gatwick Metro Centre, Balcombe Road, Horley, Surrey RH6 9GA, United Kingdom
Tel: +44 1293 783851 Fax: +44 1293 782959
e-mail: post@pps-publications.com

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A snapshot of stories from around Europe

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The summer is over and the outlook for our industry is now looking a little bit brighter. Air traffic – at least on the passenger side – has reflected improved macro-economics, with unemployment finally starting to fall in the EU and both business and consumer confidence improving. While May and June were pretty good, July and August could have been better had the weather been less clement in northern parts of Europe. Still, it is especially encouraging to see markets like Ireland and Portugal posting significant growth in passenger traffic. Also, while airlines are still not adding more capacity, at least they now seem to refrain from cutting more flights and frequencies. Falling oil prices should help this situation gather some momentum – even though downside risks remain significant.

As ever our Annual Congress and General Assembly, which took place in Istanbul last June, provided the opportunity to take stock of where Europe’s airports are standing. It was comforting to see that overall, our financial performance has been improving, despite very challenging trading conditions. Most of it is due to restructuring and continued business transformation – with significant reductions in staff costs, equipment and supplies as well as maintenance costs.

Our revenue environment remains difficult, and the fight to attract airlines and passengers is fiercer than ever. Commoditisation forces are at play, with the focus of any airport CEO on de-risking its business. This naturally comes with much shortened planning horizons – which is rather new to our industry. Keeping focused on the longer-term is increasingly difficult, as evidenced by the fact that forward investment and development plans are being scaled back.

Yet, as shown by the conclusion of the new Challenges of Growth report released by EUROCONTROL in July, demand for air transport in Europe is expected to grow by 50% in the next 20 years and airport capacity will be the bottleneck. Despite the recent crisis and slower growth prospects, the airport capacity crunch is still there. It will affect airports, airlines and ANSPs – with lost revenues totalling €40 billion per year and ground operations becoming less efficient and more costly. It will also affect the travelling public – with delays and cancellations skyrocketing throughout the aviation network. Ultimately, it will affect businesses and the European economy with an estimated €230 billion in lost GDP by 2035.

Challenges of Growth should be a major contributor to policy-making both at European and national level. As stressed not only by ACI EUROPE but also by the AEA (Association of European Airlines) and ERAA (European Regions Airline Association), it should sound an alarm. Yet, the lack of reaction from national governments is striking, with some denying the findings of the study, while the EU executive still finds it difficult to tackle the issue. The only exception remains the UK, although the time taken and the debate to reach decision remain frustrating, to say the least.

There is no comfort to take in the fact that national Governments also gave a lukewarm reception to the new package proposed by the European Commission to progress on the implementation of the Single European Sky. Be it in the sky or on the ground, aviation capacity does not feature very highly on the European agenda.

Worse, the revision of the State aid guidelines initiated by the European Commission might result in significant restrictions to the ability of national, regional or local authorities to invest in the development of new airport infrastructure or to support small regional airports. ACI EUROPE is campaigning for the Commission proposals to be amended with the support of the (AER) Assembly of European Regions and its constituents. While fair competition is paramount and a level playing field must be guaranteed, the role of airports as essential public infrastructure driving growth and jobs cannot be overlooked – especially in the context of the global competitiveness of Europe.

This issue of Airport Business brings you up to date with more details on these policy developments, which will be instrumental in shaping the future of our industry – for better or worse. It also provides an insight into a very fine example of continuous business transformation through innovation, a customer-centric culture and effective stakeholder engagement. As you can read from the lead interview with their CEO, Copenhagen Airports is about all that and much more. Unusually, I am writing these lines on a transatlantic flight bound for Montréal, where the 38th ICAO Assembly is about to start. This global gathering of aviation policy makers will also influence our fate – as it needs to agree on how aviation will address its impact on Climate Change through Market Based Measures. Failure to do so would further compromise our license to grow, and leave us exposed to more taxation.

Together with IATA and CANSO, ACI has ensured that the airport industry plays its part in an ambitious industry commitment towards carbon neutrality. Through ACI WORLD, we have also made strong representations urging ICAO and its 191 Member States to deliver on a global framework. By the time you will be reading this, we will know whether they have succeeded or not.

**AVIATION’S VISIBILITY, NO GUARANTEE OF VISION**

By Olivier Jankovec, Director General, ACI EUROPE
Dublin Airport Authority
Dublin Airport Authority, parent group of travel retailer Aer Rianta International (ARI), has been formally renamed daa by its principal shareholder the Irish Government. The decision represents "a pragmatic and cost-effective response to a situation where the specific 'Dublin' and 'Authority' elements of the corporate name did not fully reflect its business focus or ethos." Under the existing holding company framework, daa will continue to promote the identities of its operating business units, including Dublin and Cork airports.

Heathrow Airport
Passengers at Heathrow are being tracked through the airport to reduce delays to planes and help save airlines millions of pounds. Heathrow is rolling out a new system of smart boarding cards that it believes will put an end to the last-minute frantic search for lost passengers and could improve the punctuality of nearly half of flights.

St. Tropez Airport
Aéroports de la Côte d'Azur (ACA) has bought Aéroport du Golfe de St Tropez (AGST) from the Reybier group. ACA, which now has 99.9% of shares in the airport, is France's second largest airport company, serving 11.2 million passengers in 2012 through Nice Côte d'Azur (NCE) and Cannes-Mandelieu (CEO) airports.

Lisbon Airport
Lisbon Airport has increased the area dedicated to specialist retail by 60%, boosting turnover by $20 million (€15m). Lisbon Airport has recently opened a new 2,000sqm commercial area featuring 20 new stores from major international retail chains in departures. This expansion will result in 100 new jobs and estimated annual sales turnover of €15 million.

Athens International Airport
Passenger numbers at Athens International Airport (AIA) have remained robust and the facility has continued to secure new business. For many years now it has been offering a "risk-sharing" incentive scheme, providing significant discounts to its charges for the airlines developing new and/or additional services out of the Greek capital. This winter AIA will introduce three further targeted incentive schemes to further enhance relationships with current and potential future airline partners.

ACI EUROPE Best Airport Award winners – London City Airport, Edinburgh Airport, Hamburg Airport, Amsterdam Airport Schiphol, London-Heathrow Airport, Athens International Airport

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Airports in the news
Ensure that ACI EUROPE is up to speed with the latest news concerning your airport by reading the following:

Munich Airport
Munich’s ‘job machine’ airport is still creating more than two jobs each day, despite Europe’s downturn, claims the gateway’s CEO. Over the last three years, Munich Airport’s headcount has climbed by +9% from 29,560 up to 32,250, adding almost 2,800 jobs or almost 2.5 every day. Employment opportunities at Munich Airport also cover a vast range of occupations, said the gateway.

Sheremetyevo International Airport
After famously playing host to NSA whistleblower Edward Snowden in July, Sheremetyevo International Airport has opened a state-of-the-art capsule hotel ‘Vozdushny Express’ intended for transit passengers. The new hotel is located at the Clean & Transfer Area of Terminal E. The hotel is open 24 hours. The guests may only stay in the hotel for 24 hours or less. Vozdushny Express was built on the basis of European capsule hotels.

TAV Airports Holding
Turkey’s TAV Airports Holding has said it has qualified to bid for rights to operate and reconstruct New York’s LaGuardia Airport as part of a consortium. TAV first expressed interest in the US airport back in January. The consortium includes TAV shareholder Aéroports de Paris (ADP), Goldman Sachs, Tutor Perini Corporation, Ove Arup & Partners PC, Kohn Pederson Fox Associates PC, Suffolk Construction Company, BTV Incorporated and ABP Ingenierie. There are a total of four consortiums that have qualified for the LaGuardia Airport tender.

Budapest Airport
Budapest Airport has announced the launch of a new schedule that will link the East European cities of Minsk in Belarus, Belgrade in Serbia and Budapest, Hungary. The new year-round service began on 19 September 2013 and will be operated by the Belarusian airline, Belavia, which is the fourth new airline to announce routes into Budapest this year. The announcement further strengthens the expanding number of Eastern European cities accessible from the Central European Hub airport at Budapest.

Amsterdam Airport Schiphol
Schiphol Airport has inked a deal with Chinese manufacturer BYD for 35 all-electric 12-metre-long buses. The buses will be used for shuttling passengers from gates to aircraft not using a jetway. BYD claims the Schiphol fleet of tailpipe-free electric buses is Europe’s largest. The vehicles will hit the airport tarmac in about a year.

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Munich’s ‘job machine’ airport is still creating more than two jobs each day, despite Europe’s downturn, claims the gateway’s CEO. Over the last three years, Munich Airport’s headcount has climbed by +9% from 29,560 up to 32,250, adding almost 2,800 jobs or almost 2.5 every day. Employment opportunities at Munich Airport also cover a vast range of occupations, said the gateway.
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w w w . c e i a . n e t
DANES DEVELOPING CUTTING-EDGE GATEWAY TO NORTHERN EUROPE

For the perfect example of a forward-thinking airport, with innovation and the passenger experience at the heart of its strategy, look no further than Copenhagen Airports. Its CEO Thomas Woldbye outlined his clear vision for a ‘World Class Hub’ to Ross Falconer.

After just a few minutes in the company of Thomas Woldbye, his passion for the airport industry shines through. The Copenhagen Airports CEO presides over one of Europe’s most progressive airports, with a passenger-focused strategy that has seen it pioneer many innovative technologies. Woldbye joined the airport as CEO in May 2011, after a 27-year career with A.P. Møller-Maersk, the world’s largest container shipping company. He may be a newcomer to the world of aviation, but his transport and logistics experience runs deep.

Denmark is a centre of state-of-the-art design, combining simplicity with functionality, and Copenhagen Airport (CPH) mirrors this perfectly. Anyone who has travelled through the airport, particularly after the recent expansion of Terminal 2, will have been struck by the smoothness and simplicity of the passenger experience. Coupled with the airport’s eye-catching design, this creates a real sense of place.

Privatised in 1990, the Danish government remains a major shareholder in CPH with 39.2%. Ontario Teachers’ Pension Plan (OTPP) and Macquarie European Infrastructure Fund III (MEIF3) hold the majority shareholding via Copenhagen Airports Denmark (CAD). CPH positions itself as the ‘Gateway of Northern Europe’ and is developing a ‘World Class Hub’ strategy. Its achievements in the past year alone are myriad: a new baggage system, a remodelled and expanded Terminal 2, a rebuilt Pier C for intercontinental traffic, more space at passport control, new e-gates, automated bag drop and automated border control to be rolled-out by year-end, new routes… and the list goes on.

By far the biggest challenge for CPH has been the perception that the economic crisis is equally severe throughout Europe. Scandinavia has a strong and healthy economy, and an undefeated desire to travel. It can, understandably, be a challenge to convince the Americans or Chinese of this for example, as their perception of Europe as one consistent market. The reality, of course, is more nuanced. The economies of Northern Europe are thriving and CPH is working hard to get this message out there. Copenhagen is, of course, the cultural, economic and governmental centre of Denmark, and one of Northern Europe’s major financial centres. Many major international companies have chosen the city as their regional headquarters, including Microsoft and Maersk.

Woldbye: “If you look at social media, e-commerce and m-commerce, they are taking off dramatically. Around 20% of our tax free turnover is pre-ordered on the web, and interestingly, people ordering online spend more than those shopping in-store, which shows how airport retail is competing with the high street and also with the internet.”

CPH set a passenger record of 23.3 million in 2012, despite the bankruptcy last May of Cimber Sterling, which operated 19 routes from its main base at the airport. Woldbye explained that the recovery was fast, with SAS, Norwegian and Danish Air Transport stepping in to fill routes.
Dynamic traffic recovery

Impressively, CPH set a passenger record of 23.3 million in 2012, despite the bankruptcy last May of Cimber Sterling, which operated 19 routes from its main base at the airport. Woldbye explained that the recovery was fast, with SAS, Norwegian and Danish Air Transport stepping in to fill routes including Bornholm, Sønderborg and Karup. Domestic traffic suffered most, falling -19.4% last year, whereas international traffic grew +5.3%, resulting in an overall increase of +2.7%. “We already had a strong focus on growth in all areas, particularly the international segment. We also have a robust contingency plan for literally every route, so we know who we’re going to call if a route stops,” commented Woldbye.

“Traffic fell away momentarily, but the recovery was actually quite fast. We are still not back at the same level of domestic traffic, but that is more to do with the market and the fact that Cimber Sterling was probably offering a price level that encouraged more domestic travel, but that turned out to be unsustainable.”

This summer was CPH’s busiest ever; seven million passengers travelled through the airport between June and August. The latest figures for August show a +6.4% rise year-on-year, and year-to-date growth totals +3.2%. These are undoubtedly impressive figures, especially for an airport of CPH’s size and given the moderate growth being experienced across Europe – ACI EUROPE figures show a +1.6% increase in overall passenger traffic at European airports in July. The pace of recovery at EU airports in particular is fragile and CPH, under Woldbye’s dynamic leadership, is clearly outperforming.

CPH’s growth incentives are the result of it operating in a growing market. Its start-up discounts are world-class – a 100% discount on take-off and passenger charges in year one, 90% in year two, 80% in year three, 40% in year four, and 20% in year five. Public co-financing by the route development fund Global Connected has also been secured, highlighting the fundamental backing of route development by the private sector, public authorities and the political scene. The public-private partnership focuses on strengthening the marketing of Denmark as a destination, and the collaborative approach sends out a united message to airlines considering opening new services. It has produced tangible results; Woldbye highlighted SAS’ service to Shanghai and San Francisco, Singapore Airlines’ increased frequency to five times per week, and Norwegian’s routes to Fort Lauderdale, Los Angeles and New York as notable examples. Interestingly, with Emirates’ service to Copenhagen, Woldbye explained that much of the destination marketing was performed in Australia rather than Dubai: “The amount of Australian hotel nights in Denmark tripled within 12 months; that’s simply by creating awareness of the route. It’s a key part of our strategy, because just living off our traditional catchment area (four million people within two hours of CPH) won’t enable us to achieve our growth ambitions. We need to generate more business – both inbound traffic and transfer traffic.”

Focus on competitiveness

CPH is maintaining an edge with a three-pronged strategy – unique customer experiences, efficiency of operation, and competitiveness. Its response to the fierce competition between airports is to identify those that can take traffic away from CPH. Woldbye highlights four: Amsterdam Schiphol – KLM operates 11 routes from Nordic countries to AMS, bypassing Copenhagen; Berlin, which is building a large new airport and has pledged to take over the CPH position as the ‘Gateway of Northern Europe’; Helsinki, which is trying to corner the market for Asian services, taking advantage of its location, which means it can rotate an aircraft to China in one day; and Zürich which, supported by Lufthansa/Swiss, is aiming for the same long-haul traffic as CPH.

Responding to the intense international competition for air services, a new CPH Growth Committee was established in early 2013. Woldbye sits on the committee, which is tasked with identifying ideas and concrete initiatives to ensure the continued growth and improved international accessibility of CPH. This committee of influential players is chaired by Jens Kramer Mikkelsen, CEO of CPH City & Port Development, with members including industrial bodies such as the Confederation of Danish Industry, regional politicians including the Mayor of Copenhagen, and major organisations – for example Microsoft, MAN Diesel and PensionDanmark. “The idea is to identify how we can leverage the value of CPH as an asset to the national economy and to society. It’s a two-way dialogue between ourselves and the relevant stakeholders,” commented Woldbye.

CPH is a clear driver of jobs and growth throughout Denmark, and even in southern Sweden. The figures are impressive, with some 23,000 jobs in 700 companies supported directly or indirectly by the airport.

The preliminary action plan for the committee includes opening the Russian market for more air services to Denmark. “We feel that we should improve our route development to Russia, not for the sake of the airport or airlines as such, but as much for the sake of the country and its exports and tourism,” Woldbye added. Efforts to do this are complicated by the restrictive bilateral agreement that exists between Russia and Scandinavia. The strategy here is to raise the topic on the political agenda, and Woldbye is fully supportive of efforts to form an air transport agreement with Russia at EU level.

The CPH Growth Committee will also visit Istanbul in November to witness first-hand the growth being
experienced in the vibrant Turkish market. “We’d like to show the committee another climate, where things are moving at a much higher speed than in the EU,” said Woldbye. “Turkey is growing as a country, Istanbul-Atatürk is growing, and Turkish Airlines is expanding rapidly, so we’re going down there to get a different perspective.”

**Leading-edge innovation**

Woldbye speaks eloquently about the passenger experience – a subject clearly close to his heart. The airport interviews 110,000 passengers each year and turns its findings into concrete actions to enhance the travel experience. It is a strategy that has placed CPH way ahead of the curve, as evidenced by its pioneering introduction of augmented reality. It is the first airport in the world to utilise augmented reality with its groundbreaking 360-degree wayfinding app, which uses panoramas of all areas to allow passengers to visualise their journey through the airport on their computer or smartphone. Passengers can select their starting point and where they want to get to from a drop down menu of airport locations. A metre-by-metre visualisation of their route then enables them to work out their journey. The entire airport was photographed in acute detail with a special camera that photographs from 380 degrees. The photos were then stitched together using special software, resulting in an exact photographic representation of the entire airport, similar to the ‘street view’ function of Google Maps. “Augmented reality is leading edge and has been very well received. It’s an investment that’s visible to the passenger, so you get the promotional aspect, and it’s not hugely costly,” explained Woldbye.

The airport has a very strong brand and a prominent social media presence on Facebook. Like many capital city airports in Europe CPH is the most popular place in the country to ‘check-in’ on Facebook or Foursquare, which just shows the aspirational nature of airports and the sense of excitement and theatre that they generate. There are also plans to join Twitter before the end of the year. “We find that more than 90% of posts on Facebook are positive. We’ve ended up with a lot of ambassadors for the airport,” added Woldbye. “If you look at social media, e-commerce and m-commerce, they are taking off dramatically. Around 20% of our tax free turnover is pre-ordered on the web, and interestingly, people ordering online spend more than those shopping in-store, which shows how airport retail is competing with the high street and also with the internet. We’ve seen an interesting trend whereby retail sales in downtown Copenhagen are down -10%, while we experienced a +10% increase in retail sales in 2012, so we see that people are researching online and doing their shopping at the airport.” Currently, 45% of the airport’s revenues come from non-aeronautical activities.

CPH has also been a pioneer of self-service technologies, with more than 50% of passengers using self-service check-in kiosks, self-service boarding pass scanners were introduced earlier this year, and automated bag drop and automated border control will be rolled-out before the end of the year. These innovations are central to the ‘World Class Hub’ strategy and the airport’s desire to empower the passenger. “Travellers who have the highest level of self-service feel more in control and are the most satisfied,” stated Woldbye.
An additional quality enhancement is the implementation of alliance check-in for both SkyTeam and one-world carriers, which streamlines the check-in process for member airlines and reduces the cost of the check-in operation. It is believed to be the first of its kind in the world and has been very well received by both SkyTeam and oneworld. A similar offer is being developed for the Star Alliance carriers, excluding SAS. Woldbye explained that CPH holds regular consultations with the airlines, creating a real two-way dialogue, to determine what adjustments can be made to suit individual airlines and their business models.

Meanwhile, the CPH Advantage programme has grown to more than 400,000 members, and the range of benefits is being expanded by bundling together products such as parking and lounge access. Members earn points when shopping online, or booking services including parking or lounge access.

Environmental excellence

Corporate Social Responsibility is firmly embedded into the CPH culture, and Woldbye speaks fluently about the airport’s environmental objectives. He believes that CSR must make sense for the business and for society. Scandinavians are renowned for living in harmony with nature and this is reflected in CPH’s ambitious environmental agenda. A key target is to reduce CO2 emissions by 20% per passenger by 2020, and these efforts involve working in cooperation with the airlines and concessionaires. “Green takeoffs are a major contributor to CO2 reduction. We’re fortunate that a high proportion of our takeoffs are over water, meaning we can let aircraft turn much faster in the right direction – this saves 32,000 tonnes of CO2 per year,” explained Woldbye.

A geothermal plant currently produces 80% of the energy required to run the airport’s air conditioning system, and that will soon be increased to 100%. The recent renovation of the tax free shops saw the installation of energy-efficient LED lighting. CPH was able to generate a saving of DKK1 million (€134,000) per year for Heinemann – owner of the main tax free shop – simply by switching to LED lighting. Woldbye added that all taxiway lighting is to be converted to LED too, while an impressive 58% of passengers arriving at the airport via public transport. So, CPH is doing a tremendous amount in this regard, something it plans to communicate more to the general public. It also plans to apply to become Airport Carbon Accredited under the global, institutionally-endorsed carbon management certification programme.

Investing for growth

CPH invests more than DKK1 billion (€134m) per year – mainly to the general public. It also plans to apply to become Airport Carbon Accredited under the global, institutionally-endorsed carbon management certification programme. It is the implementation of alliance check-in for both SkyTeam and one-world carriers, excluding SAS. Woldbye explained that CPH holds regular consultations with the airlines, creating a real two-way dialogue, to determine what adjustments can be made to suit individual airlines and their business models. Meanwhile, the new baggage system – operator of the main tax free shop – simply by switching to LED lighting. Woldbye added that all taxiway lighting is to be converted to LED too, while an impressive 58% of passengers arrive at the airport via public transport. So, CPH is doing a tremendous amount in this regard, something it plans to communicate more to the general public. It also plans to apply to become Airport Carbon Accredited under the global, institutionally-endorsed carbon management certification programme.

Investing for growth

CPH invests more than DKK1 billion (€134m) per year – mainly in increased capacity. A highlight of the airport’s infrastructure investment was the dedicated low-cost pier, CPH Go, which has performed very well since opening in 2010. LCC traffic accounts for 26.5% of the total, and the development of CPH Go is a tangible result of the airport’s efforts to satisfy the requirements of different airline business models. Easyjet’s traffic has grown significantly since the opening of CPH Go, and in 2013 will exceed 1.4 million.

The expanded Terminal 2 was opened in June, alongside an expanded baggage system. DKK840 million (€132m) was invested in the two projects, which provided additional capacity to meet future growth. CPH operates an under-one-roof concept, with its three terminals adjoined, creating a smoother process for passengers transferring between terminals. The Terminal 2 refurbishment added 1,400sqm, 12 new check-in desks, and 16 new check-in kiosks. Meanwhile, the new baggage system can handle bags from 30 million passengers annually. The F&B offer was also enhanced – highlights include a new Danish bakery and an American steakhouse, MASH.

The CPH master plan makes provision for several future projects to be undertaken in line with demand, including further terminal expansion, Pier C extension, baggage enhancement, airside expansion, new aircraft stands, new bus gates and new deicing facilities.

Our time with Woldbye is coming to a close, but he has left us in no doubt that he is a leader with a clearly defined vision and the conviction to achieve it. He speaks with impressive detail and authority on all aspects of the CPH business: “That’s one of the great things about this business – the diversity. You’re dealing with everything from the hot dog concession, the challenges in our logistics centre, our new route openings or our moves on social media – it’s always interesting.”
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THE VALUE OF PERFORMANCE.
NEW STATE AID RULES PUT REGIONAL GROWTH IN JEOPARDY

As regular readers will be aware, the Summer edition of Airport Business contained a comprehensive preview of the proposed new guidelines on State aid to airports and airlines, and the background to the issue. The European Commission has since published those proposals, which have potentially devastating consequences for smaller regional airports and the communities they serve, with many of these airports at risk of closure. Here, we provide an update on what the new rules will mean for airports. Report by Ross Falconer.

As previously reported in Airport Business, the issue of State aid is a contentious one, particularly in the aviation sector. ACI EUROPE shares with the European Commission the twin objectives of economic growth and undistorted competition, but the new guidelines fail to reflect the harsh economic realities of the smaller airports, and they compromise their significant positive externalities.

Small regional airports are vital public transport infrastructure – in the EU alone, they support a GDP contribution of €16.15 billion and 265,000 jobs. While fostering social and economic development, and local accessibility, figures show that 51% of airports with fewer than five million annual passengers and 65% of those with less than one million are loss-making.

Under the proposals, following a 10-year transitional period, airports with more than 200,000 passengers per year will no longer be able to receive public operating aid. Yet operating aid at smaller airports where annual traffic is below one million passengers, exists precisely because they cannot recover their full costs through airport charges.

The increasing market dominance of airlines and the exponential growth of the low-cost carrier (LCC) business model has added competitive pressures to regional airports, which are also at a structural disadvantage in generating the non-aeronautical revenues that are an increasingly important driver of economic sustainability. Donagh Cagney, Manager: Economics, ACI EUROPE, explained: “The guideline proposals on operating aid don’t fit with the financial profiles of small airports. We’re proposing that instead of cutting-off allowed operating aid at the 200,000-passenger threshold, aid should be allowed at decreasing intensities up to one million passengers per year. This would properly reflect the economics of the industry and incentivise growth to financial viability, all while allowing aid only where there is genuine need – an important consideration if distortions to competition are to be avoided.”

In the worst case scenario, there is the potential for many airports across Europe to close amongst the 92 with an annual throughput of between 200,000 and one million passengers.

This is very real threat. Piero Righi, Managing Director, S.A.G.A. S.p.A, operator of Pescara’s Aeroporto Internazionale d’Abruzzo, commented that, while the impact of the Guidelines is still being assessed, the closure of the airport, which handled 563,000 passengers...
in 2012, is a real risk. According to a recent Assaeroporti study, this would cause an increase in the average trip duration of over 30 minutes for 950,000 people, over 60 minutes for 560,000 people, and over 90 minutes for 150,000 people. It would also be devastating to job and growth in the region; Aeropuerto Internacional d’Abruzzo employs 300 staff, and 1,500 jobs in total are supported by the airport’s activities. “The airport contributes over €100 million per year in tourist income to the Abruzzo region, which equals 9% of the total,” explained Righi.

**Investment implications**

Another important issue is investment aid for capital expenditure projects. The financing of new infrastructure is challenging for smaller airports, and the guidelines limit aid to airports below five million passengers per year, with less flexibility as airports grow in size.

Righi, commented on this element: “The new Guidelines will certainly limit the possibility to finance investments related to airport and airport-related infrastructures, such as intermodal connectivity.”

Significantly, limited investment aid – 25% intensity – is permitted for airports handling three and five million passengers, and that must be repaid to public authorities, with interest. Cagney explained that the ACI EUROPE position is that this aid should not be refundable.

The new rules will also effectively close the door on public aid for largescale infrastructure developments, as no investment aid is allowed for airports with more than 5 million passengers per year. The sheer scale of one-off large airport projects, such as the various proposals for a London ‘gateway airport’, means they cannot always be funded solely by private financing. If Europe’s air transport industry is to remain relevant, there is a requirement to invest to ensure the continued economic and social benefits that airports deliver. EUROCONTROL recently issued another stark warning of the airport capacity crunch. At a time when investment in airport infrastructure should be a priority, the new guidelines fly in the face of this need for more capacity. Provision must be made for investment aid in new greenfield projects, otherwise airport will be at a major disadvantage compared with emerging economies where investment in aviation infrastructure is a key strategic priority and public aid is commonplace.

ACI EUROPE has engaged constructively with the European Commission on the issue of State aid for more than a year. On 17 September, it also held a joint hearing on the proposed guidelines in the European Parliament in Brussels, in cooperation with Franck Proust MEP (EEP, South West France) and Union des Aéroports Français (UAF). The event brought together more than 100 participants, many of whom were very vocal in their opposition to the new guidelines. In fact, there was strong consensus among the airports, local and regional authorities, and MEPs present, on the need for the guidelines to be amended to support airports’ positive externalities and their essential contribution to growth and jobs.

Franck Proust MEP said: “What is being proposed is too damaging for us to stay quiet, especially when the very future of hundreds of communities and thousands of jobs is at stake. Economic renewal, growth and social cohesion are absolute priorities for Europe right now. Competition policy should be at the service of economic development and growth, not the other way around.”

John Hanlon of the European Low Fare Airline Association (ELFAA) was also emphatic and he highlighted how airports and aviation are great drivers of economic growth and employment opportunities. Ian Catlow of Transport for London underlined that more airport capacity will be needed, so why rule out public funding for large airport projects?

Without it, he asserted that Istanbul would become the Europe’s primary hub. In his own closing remarks, ACI EUROPE Director General Olivier Jankovec commented “Good policymaking needs to be based on long term vision.”

Crucially, representatives of Member States voiced similar concerns at a meeting organised by the European Commission to get their views on the proposed new Guidelines the day after the joint hearing in the European Parliament.

The public consultation on the new proposals concluded on 25 September. ACI EUROPE has responded with its own analysis paper – Airports & State Aid: how to protect both Growth & Competition – which calls for specific changes in allowable operating and investment aid, while meeting those twin objectives of economic growth and undistorted competition. While the European Commission is the steering wheel here, the voice of Member States will be very influential. Regional airports likely to be affected are therefore encouraged to talk to the regional and national governments of their respective Member States and urge them to make representations to the EC directly. The European Commission is expected to produce final guidelines in January/February 2014.

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AIRPORT INDUSTRY CARBON STANDARD TAKES ON ANOTHER CONTINENT

With aviation emissions back in news, due to ICAO’s quest to put in place a global system to reduce airline emissions, we report on the airport industry’s update on its own voluntary climate change initiative, Airport Carbon Accreditation. In the past 4 years, the programme has gathered steady momentum, expanding beyond its initial European focus, to include airports in Asia, Australia, the Gulf and most recently, Africa. Report by Elliot Bailey.

The independent, institutionally endorsed programme, Airport Carbon Accreditation has already won praise from ICAO, UNEP and the EU’s Climate Action Commissioner Connie Hedegaard and Transport Commissioner Siim Kallas. It has also just achieved a place in the Top 10 shortlist of the EU’s World You Like Contest – an EU-wide competition for projects which help achieve a low carbon economy. The contest had 269 entrants and the final winners – selected from the Top 10 shortlist - will be announced at the gala evening of the Sustania conference taking place in Copenhagen in November.

Initially launched in Europe in June 2009, Airport Carbon Accreditation has moved up several gears in the past 4 years. In November 2011, the programme expanded to the Asia-Pacific region, gaining the support of ICAO at that time too. In June, at this year’s joint ACI EUROPE & ACI WORLD Annual Congress in Istanbul, the programme expanded again – this time to the African region of ACI. On that same night, Enfidha-Hammamet International Airport in Tunisia became the very first African airport to achieve certification.

Olivier Jankovec, Director General ACI EUROPE is delighted with the industry’s take-up of the programme. “Year 4 of Airport Carbon Accreditation was an epic year. We saw more airports reducing their CO₂ than ever before, including an entire national airport group becoming carbon neutral. Our colleagues in Asia-Pacific secured the participation of 12 airports in Asia-Pacific, including Hong Kong International Airport, certified at the ‘Optimisation’ level. And now Year 5 has kicked off with the extension to Africa - that’s real momentum for such a young programme.”

Reducing carbon emissions

As the centrepoints of a complex web of aircraft movements, technical operations and surface access transport, airports can address their CO₂ emissions in a variety of ways. These can include better insulation and energy efficiency, switching to green energy sources, investing in hybrid, electric or gas-powered service vehicles, encouraging employees, passengers & visitors to use public transport, working with
airlines & air traffic management to reduce runway taxiing times and implement green landing processes, and much more.

As occurs every year in June, the programme’s Annual Report was released, with details of all the airports certified at one of the 4 available levels of certification (‘Mapping’, ‘Reduction’, ‘Optimisation’ and ‘Neutrality’). In Year 4 of the programme (June 2012 to May 2013), the collective reduction was over 170,000 tonnes of CO₂, enough to power 71,000 households for a year.

Jankovec said: “This is concrete action that has produced effective, independently-verified results. Within and beyond Europe, airports of all sizes are now engaged in a real efficiency drive to reduce CO₂ emissions that is making a tangible difference to the industry’s carbon footprint.”

New entrants over the summer include Slovenia’s Ljubljana Airport and Bucharest Henri Coanda International Airport in Romania, as well as Adelaide, Parafield and Sunshine Coast airports in Australia (all certified at the ‘Mapping’ level). In terms of upgrades, Farnborough Airport in the UK recently succeeded in moving up another level, achieving the ‘Optimisation’ certification, as did Hyderabad Rajiv Ghandi International Airport in India.

**Online application now available**

For airports looking to apply to become Airport Carbon Accredited at one of the four available levels of certification, a new online application tool was launched in July, along with the programme’s new website. It eases the application process for airports and third party verifiers, as well as providing an intuitive and simplified process for renewals and upgrades. The new tool is aimed at making application more accessible, more cost effective and less time consuming for airports.

The new tool is an important development, not least because the programme requires voluntary application by each airport on an annual basis. In Europe, 77 airports in 24 countries are currently certified at one of the 4 available levels of accreditation, including 14 that are carbon neutral. Combined with the certification of 12 airports in the Asia-Pacific region of ACI and 1 airport in ACI Africa’s region, the programme now comprises 90 certified airports. These airports welcome around 22% of global air passenger traffic every year.

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EUROCONTROL has released the fourth edition of its Challenges of Growth report, its first since 2008. Identifying constraints in the air transport system between now and 2035, the report provides a further stark warning of the approaching airport capacity crunch. Report by Ross Falconer & Elliot Bailey.

One of the key figures that was on everyone’s lips at this year’s ACI EUROPE Annual Congress related to the economic impact of the looming airport capacity crunch. ACI EUROPE Director General Olivier Jankovec gave a preview of some of the report’s findings. EUROCONTROL’s startling figures show by 2035, some 20 airports in Europe will face the kind of congestion that Heathrow has today. This will cause a further ripple effect across the airport network and the capacity crunch will cost airports and airlines more than €40 billion in lost revenues and €5 billion in congestion costs, annually. ACI EUROPE estimates that the wider economic impact will be even more dramatic, with insufficient airport capacity expected to cost Europe €230 billion in lost GDP.

Aviation can play a key strategic role in fostering jobs and growth, which, in Europe’s present economic climate, should be considered all the more important. But the industry is facing a difficult time, in which Europe’s governments are failing to capitalise on the fact that airports generate economic growth. It was a fact highlighted by Declan Collier, CEO London City Airport and then-ACI EUROPE President, at the Joint ACI EUROPE/WORLD Annual Congress & Exhibition in Istanbul in June. “Short-termism, micro-politics, regulatory burden, red tape, bilateralism and the urge to refill the State coffers are the forces that continue to pay havoc with the European aviation sector. Few European countries have a thoroughly thought-through and fully formulated aviation policy. Long-term challenges are being ignored at our peril,” he asserted.

The reality is that Europe is failing behind. Airports are being forced to reduce their expansion plans through economic pressures, lack of political support and poor planning processes, and capacity is simply not being scaled up sufficiently quickly. This will not be helped by the proposed curbing of investment aid to airports with over five million passengers, as part of the European Commission’s new State aid guidelines. According to EUROCONTROL, airport capacity is now expected to increase by just 17% by 2035, whereas in the 2008 Challenges of Growth report, plans indicated a 38% increase by 2030. The result of this will be 12% of demand going unaccommodated because of insufficient airport capacity – or 1.9 million flights not taking place and 237 million passengers unable to fly. EUROCONTROL’s figures are unequivocal and clearly point to another difficulty for the realisation of the EU’s flagship transport project, the Single European Sky.

However, expanding airport capacity isn’t just about planning and statistics. The instrumental role of airports in society is being taken for granted by European governments. If you don’t believe it, simply look at efforts to build new airports in Europe, many of which are beset by problems. Plans for the new €3 billion Lisbon Airport were confirmed by the Portuguese Government in 2008. Construction was to begin in late 2010 or early 2011, but in May 2010 was put on hold due to the financial crisis. Munich Airport’s campaign for a third runway has also faltered, due to local politics. Similarly, the
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new Notre-Dame-des-Landes airport, north-west of Nantes, has split political opinion and met with strong opposition. The project to replace Nantes-Atlantique as the main airport serving the region was originally tabled over a decade ago. The annual capacity at Nantes-Atlantique is three million and its proximity to the city centre prohibits expansion. A political greenlight for the new airport was given in 2008, with construction to start in 2014 and an opening date of 2017. The initial planned capacity is four million passengers per year, rising to nine million by 2050, however the project is currently a regular subject in the French media, due to a series of elaborate publicity stunts by a protest group. Construction of the new airport is now expected to begin in 2017 at the earliest.

Running an airport is famously complex and so is the challenge of building one. Perhaps the most widely reported such case internationally is the saga of Berlin Brandenburg Airport Willy Brandt, which has also suffered from political interference. Originally due to open in 2010, with an initial annual capacity of 27 million passengers, it has been the subject of numerous delays resulting from construction problems. There is currently no opening date for the new airport. It is expected that a roadmap to the opening will be presented this summer, once the new management team has concluded its assessment.

The UK is among those countries in which the capacity crunch will be most acute, and the convoluted debate surrounding airport capacity in London is an apt example of a lack of clear political vision. Any decision has been kicked into the long grass, with the Davies Commission not due to present its report on the way forward for UK airport capacity until after the next general election in 2015. An interim report is due at the end of 2013, and the full report in summer 2015. Heathrow, Gatwick and Stansted airports have all submitted proposals for additional runway capacity and Birmingham Airport has also put forward an alternative solution. Another proposal is for a brand new hub airport in the Thames Estuary, east of London, dubbed ‘Boris Island’ as it has been championed by Boris Johnson, the Mayor of London.

Focused aviation strategy required

There is a stark contrast between the short-sighted, burdensome regulatory approach in Europe and the strategic importance placed on aviation in the world’s emerging economic powerhouses, who clearly recognise the importance of aviation to economic growth. China, for example, is demonstrating its ability to get things done, and fast. Given its size, confidence and economic strength, it is certain that China will play a leading role on the world stage over coming decades, and the huge investment being made in the country’s transport infrastructure is key to this. China is set to open 72 new airports by 2015, in addition to more than 30 renovations at existing airports. The Middle East, too, demonstrates a fully-aligned aviation strategy, with major new airports, including Dubai’s Al Maktoum International and Qatar’s Hamad International, highlighting the strategic importance placed on developing air transport infrastructure. Meanwhile, a little closer to home, there is a clear distinction between the approaches of the EU and Turkey to airport development. Turkey has announced plans to build the world’s biggest airport in Istanbul, with six runways and an annual capacity of 150 million; the first stage of the US$10 billion (€7.5bn) hub is due to open in 2017.

The airport capacity crunch also has implications for the delivery of the Single European Sky. Europe’s airports are fully supportive of SES and the much-needed progress being made on ATM capacity and performance. However, these efforts will be fruitless unless capacity in the sky is aligned with capacity on the ground.

Frank Brenner, Director General, EUROCONTROL, commented:

“We are already today seeing delays caused by a lack of capacity. That’s a problem both with ATM capacity and also, perhaps more significantly, a lack of capacity at airports. Compared to 2012, there will be, in 2035, a lot more airports in Europe that are operating very close to capacity for long periods each day. That means a lot more delays at the airports themselves and it also makes the entire system more congested and less able to cope with any disruption, such as bad weather. And airports operating at the capacity limit are a constraint to economic growth.”

The latest Challenges of Growth report should be taken as a clear warning of the consequences of inaction over the airport capacity crunch. It reiterates and reconfirms the airport capacity challenge identified in the three previous Challenges of Growth studies. Europe’s airports must be given their licence to grow and develop infrastructure within reasonable timeframes, and following the report’s release in July, ACI EUROPE together with the AEA (Association of European Airlines) and ERAA (European Regions Airline Association) called for a European Action Plan on airport capacity to address the issue. This could involve the European Commission asking Member States to come up with national strategies on airport capacity so as to address the crunch and also deliver on the ambitious objectives of the Single European Sky. The future of European aviation urgently needs a coherent policy, one that must be delivered in the near-term.
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Ask any traveller to identify the one change that would enhance their airport experience and it would likely be the ability to carry liquids on board without the need for them to be removed from hand baggage and screened separately. The LAGs restrictions have redefined the airport security experience and perhaps had the deepest impact on the overall passenger experience in recent years. All the while, airports are striving to minimise waiting times and inconvenience to travellers, while maintaining stringent security levels.

The US Department of Homeland Security, Transportation Security Administration (TSA) and the European Commission, along with a number of other countries, put in place restrictions on LAGs to counter a threat to international civil aviation – a threat that remains real today. These restrictions were intended to be temporary, with a view to being replaced by a technological solution that will deliver a comparable level of security for international flights and will provide passengers the convenience to once again travel with LAGs of all types, shapes and sizes in their carry-on baggage. Over time, progress has been made in screening technologies, with a number of systems passing laboratory tests and undergoing field tests under a variety of screening scenarios. ACI EUROPE supported the postponement of the 2013 deadline, and has unswervingly argued that the removal of restrictions must be based on a sustainable technological solution with a high degree of probability of detection of a wide range of liquid explosives, while also being passenger-friendly. ACI EUROPE in collaboration with other industry stakeholders has also produced a flyer providing clear information to passengers about what the new rules will mean for them from 31 January 2014.

The TSA, the European Commission and industry stakeholders, including ACI EUROPE, will continue their collaborative efforts to find a comprehensive risk-based security solution for identifying liquid explosives that will facilitate the lifting of the current LAGs restrictions as soon as practical.

Rules on the carriage of liquids, aerosols and gels (LAGs) have been a hot topic since restrictions were initially introduced in August 2006. Security and operational concerns have made the relaxing of these restrictions a protracted process, as regular readers will have seen reported in Airport Business. The April 2013 deadline for the removal of all LAGs restrictions was replaced this spring with a new roadmap and a phased approach. The first phase applies from 31 January 2014. Report by Ross Falconer.

Towards January 2014: Phase 1 of New LAGs Rules Approaches
of the current LAGs restrictions as soon as practical, while maintaining security and facilitating the movement of passengers and commerce in international civil aviation.

Following a series of false starts, the new phased approach is designed to ensure operational feasibility while maintaining the required high level of security. The first phase of this progressive roadmap, applicable from January 2014, is designed to test the operational impact of screening LAGs. Involving a limited range of liquids, it is expected to have a minimal impact on airport screening operations based on the existing level of LAGs carried by passengers.

Perhaps the biggest change travellers will notice when transferring through EU airports from January will be the ability to carry duty free LAGs purchases onboard their next flight; passengers will need to present these items in sealed Security Tamper Evident Bags (STEBs) alongside proof of purchase. When transferring in those countries, all other LAGs must not exceed 100ml and must fit in a transparent one-litre resealable plastic bag. Additionally, liquids needed during the trip for medical purposes or special dietary requirements, including baby food, are allowed.

Marjeta Jager, Director of Security for the Directorate-General for Transport and Mobility of the European Commission, commented to Airport Business: “We have worked tirelessly with EU Member States, industry stakeholders and international partners to give passengers back the possibility to take liquids on planes. By the end of January, we intend to start with duty free liquid purchases which will be accepted for screening at security checkpoints in European airports provided they are sealed in STEBs as designed by the International Civil Aviation Organisation. This is good news for air travellers, as it puts convenience back into the equation for providing a positive travel experience without compromising on security.”

Phase two, and subsequent phases, are dependent on acceptable implementation of the preceding phase, with an assessment that adding additional types of LAGs is operationally feasible and provides effective security. After false dawns in 2011 and 2013, the new roadmap provides a more realistic, phased approach, which should lead towards the full lifting of restrictions over the next few years, improving the travel experience for all passengers.
2013 was a special year for the ACI EUROPE Annual Congress & Exhibition, held jointly with ACI WORLD for the first time in over a decade. Hosted by TAV Airports, Istanbul could not have been a more appropriate location to discuss the central theme of Dynamic Airport Business Transformation. Its aviation sector is booming and, at current growth rates, Turkey will become Europe’s fourth largest aviation market in 2015. TAV Airports’ Istanbul-Atatürk continues to grow impressively – the latest figures showing +4.9% growth in July. Indeed, the dynamism of the Turkish aviation market was demonstrated in the lead-up to the world’s airport community gathering in Istanbul, with the announcement that Turkey plans to build the largest airport in the world. The US$10 billion (€7.5bn) airport will have six runways and an annual capacity of 150 million, with the first stage operational as early as 2017.

The annual gathering was attended by more than 800 key industry stakeholders, from airports, airlines, ANSPs, national governments and EU institutions. It took place against the backdrop of the protests in Istanbul’s Taksim Square, which served as a timely reminder that airports are accustomed to dealing with disruption responsibly, efficiently and effectively, whether that disruption is caused by political events, ash clouds, or security threats.

Declan Collier, CEO London City Airport and then President, ACI EUROPE, shared his views on the issues facing Europe’s airports, in particular highlighting EUROCONTROL’s ‘Challenges of Growth 2013’ report. “The airport capacity crunch is set to cost airlines and airports in excess of €40 billion of lost revenues per year by 2035. In addition, you need to add close to €3 billion in congestion costs. But ultimately, this is not going to be just about aviation – but about Europe’s global relevance and economic performance. Insufficient airport capacity will cost €230 billion in lost GDP to Europe – that is a lot of economic activity and a lot of jobs that we cannot afford to lose.”

In her Welcome Address, ACI WORLD Director General Angela Gittens explained that in 2012 global traffic growth was +3.9%. Meanwhile, there was a +2.4% increase in airport income.

Dr. Sani Sener, President and CEO, TAV Airports Holding, expanded on TAV’s progression from a construction company to a leading airport operator. “We provided service to 10 million passengers during our first year of operation at Atatürk Airport. Last year we welcomed 45 million passengers and the total number of passengers we provide service to across all airports we operate reached 72 million. The coalition of TAV Airports and Aéroports de Paris created one of the world’s largest platforms in the airport operation sector. In this sector, knowing the behaviour and demands of the passengers is very important; together with AdP, we have data for 200 million passengers and I am confident that we will move both our industry and company forward.”

Olivier Jankovec, Director General, ACI EUROPE, explained that 2012 saw a +1.8% increase in Europe’s overall passenger traffic, signalling a slowdown in the recovery that followed the global economic crisis. ACI EUROPE forecasts passenger growth of just +0.5% for 2013. “Europe is not just about a two-speed aviation market between EU and non-EU countries. There is also a big divide between the larger hubs and the smaller regional airports. The hubs are showing a lot of resilience due to their reliance on intercontinental traffic. Meanwhile, small regional airports are almost exclusively dependent on intra-European demand and they have been the hardest hit by airlines’ capacity and route cutting. Overall, 48% of Europe’s airports are losing traffic.”

In her Welcome Address, ACI WORLD Director General Angela Gittens explained that in 2012 global traffic growth was +3.9%. Meanwhile, there was a +2.4% increase in airport income.
The theme of business transformation permeated throughout the conference, with sessions dedicated to dynamic leadership, the airport-airline relationship, airport investment, the passenger experience, and the environment. The airport industry has changed significantly over the past decade, with a stronger business mindset, an increasing focus on non-aviation revenues, and a passenger-focused attitude involving greater engagement with travellers through smartphone apps and social media.

Attendees heard from an impressive array of high-profile speakers, who passionately conveyed how the industry is being transformed on a European and world level, including keynote addresses from Dr. Temel Kotil, President and CEO, Turkish Airlines; David Scowsill, President and CEO, World Travel & Tourism Council; and Tony Tyler, Director General, IATA.

The ACI EUROPE General Assembly also saw the election of Arnaud Feist, CEO of Brussels Airport Company, as ACI EUROPE President. Meanwhile, the 9th Annual ACI EUROPE Best Airport Awards took place during the event’s opening reception.

Alongside the event, ACI EUROPE signed a cooperation agreement with the Turkish Directorate General of Civil Aviation, which through the exchange of knowledge and best practice will assist the Turkish authorities in enhancing their safety, security and environmental capabilities.

The 24th ACI EUROPE Annual General Assembly, Congress & Exhibition, hosted by Fraport, will take place in Frankfurt, 16-18 June 2014.

The exhibition was officially opened by Orhan Birdal, Chairman of the Board & Director General, DHMI, Turkey. He was joined by Angela Gittens, Director General, ACI WORLD; Dr. Yiannis Paraschis, CEO Athens International Airport and Chair, ACI WORLD Governing Board; Olivier Jankovec, Director General, ACI EUROPE; and Declan Collier, CEO London City Airport and then President, ACI EUROPE.

The winners
1-5 million passengers category
London City Airport
5-10 million passengers category
Edinburgh Airport
10-25 million passengers category
Hamburg Airport
Over 25 million passengers category
Amsterdam Airport Schiphol & London-Heathrow Airport

Eco-Innovation Award
(Awarded by the independent Advisory Board of Airport Carbon Accreditation)
Athens International Airport

WBP Recognition Award
Sarah Branquinho, Business Relations & External Affairs Director, World Duty Free Group and President of the European Travel Retail Confederation.

Participating in the Airport Leaders Symposium were Laurensius Manurung, Director of Finance, PT Angkasa Pura II; George Uriesi, Managing Director, Federal Airports Authority Nigeria; Paul Kehoe, CEO Birmingham Airport; Dr. Yiannis Paraschis, CEO Athens International Airport and Chair, ACI WORLD Governing Board; Mark Reis, Managing Director, Seattle-Tacoma International Airport and First Vice-Chair, ACI-NA; Jos Nijhuis, President and CEO, Schiphol Group; and Angela Gittens, Director General, ACI WORLD.
Arad International Airport expects to handle 100,000 passengers this year and is embarking on a terminal expansion that will provide a modern, efficient facility for up to one million passengers per year.
is trying to convince more low-cost carriers of the traffic potential that exists at Arad and the possibility of profitable business opportunities. Domestic flights to Bucharest are another key goal. “Our advantages represented by location, accessibility, very good infrastructure and lower airport charges will always be opportunities that we must capitalise on,” said Mircea. “Low-cost flights are the most appropriate for the level of income of the population living in the airport’s catchment area. I am convinced that our airport has the potential to provide passengers at least for services to Italy, Spain, France, Germany, UK, Ireland, Belgium and the Netherlands.”

His belief is that throughput will reach 100,000 this year, helped by the fact that Wizz Air relocated its Timisoara traffic to Arad for two weeks during the summer season, while runway repairs were undertaken. “It may be possible to open new routes from Arad operated by Wizz Air. In any case, while we do not have any specific targets, I am convinced that Arad International Airport has the potential to significantly increase both passenger and cargo traffic,” added Mircea.

While EU rules on State aid would allow Arad County, the airport’s owner, to make a limited provision for start-up aid to airlines launching new routes, it has yet to practice this form of stimulation for the airlines. However, a generous incentive scheme is in place to encourage carriers to open new routes, ranging from a 5% reduction in landing charges for 6-9 movements per month, to a 50% reduction for more than 160 movements per month.

**Terminal and runway extension**

The airport is investing around €10 million on two major expansion projects to be completed within three years – an updated passenger terminal and a runway extension. Work on the terminal will begin next year and will increase annual capacity to one million passengers. The current, dated terminal was built in 1936, and the investment will provide a modern, efficient facility for passengers. Meanwhile, the 350m runway extension is necessary as the new Arad bypass inaugurated last year passes nearby and has reduced the runway threshold by 180m, meaning the Landing Distance Available (LDA) is currently 1,820m. The extension will ensure a proper, safe landing distance for an A320 and 737 type aircraft.

While the Arad bypass, linking Romania and Hungary, has necessitated a runway extension, it does, importantly, provide excellent accessibility to the airport. It may also contribute to attracting new air services as it effectively increases Arad International Airport’s catchment area to include eastern Hungary. As Mircea points out, “There is no other airport between Arad and Budapest.”

“I personally am an optimist and I have no reason not to believe in the future of Arad International Airport. The aviation market is growing. Arad County is one of the most developed in Romania economically, and the political and administrative leadership of Arad County is very interested in the airport’s development,” he added.

The airport certainly doesn’t lack ambition. It is investing to provide sufficient future capacity and developing a keenly-focused strategy aimed at attracting new low-cost carriers. Load factors of more than 80% on the Wizz Air service suggest the potential is there to significantly increase passenger traffic, and we await with interest the next stage in the airport’s air service development.
At the 23rd ACI EUROPE Annual Assembly, held in Istanbul in June, Arnaud Feist, CEO of Brussels Airport Company, was elected to lead ACI EUROPE as President. He succeeds Declan Collier, CEO of London City Airport, who stepped down from the role after two terms as President of ACI EUROPE.

Feist said: “I am honoured to take on this role. Recent years have shown that the challenges for our industry are plentiful and that we need strong representation with policy makers and regulators at European level. More than ever, decisions taken in Brussels affect your business – our business, and that trend is only set to continue. ACI EUROPE is a unique centre of expertise, knowledge and standards, which we need to continue developing and enhancing. ACI – and not just ACI EUROPE – can play a bigger role in setting industry-wide standards. In so doing, we can exercise greater control not just on our own business environment, but become more active players in influencing the future direction of the aviation sector in general. As President, my priority at all times will be to ensure we defend the collective interests of all our members, regardless of size or location. I will work closely with the ACI EUROPE office and staff and will seek to engage the Board and the membership at large in actively supporting our advocacy efforts. Informing the EU Institutions about the realities of our business is a never-ending task – for that reason, our objective will not be limited to keeping you, the members, fully informed and up to date with developments. It’s also about changing some of the widely held misconceptions out there about the relationship between airports, airlines, air navigation service providers and ground handlers.”

Patrick Ky assumed his new role as Executive Director of the European Aviation Safety Agency (EASA) on 1 September 2013. Vastly experienced, he has worked in the civil aviation arena for more than 24 years, including managerial positions in the French Civil Aviation Authority and at EUROCONTROL.

Immediately prior to joining EASA, Ky was, from October 2007, Executive Director of the Single European Sky Air Traffic Management Research (SESAR) Joint Undertaking. He drove the set-up and execution of the ambitious European air traffic management modernisation programme.

Ky explained that he is very proud to have been chosen to embrace this new responsibility, He expects that EASA will in the future further strengthen its role and responsibilities to become a worldwide reference in aviation. He also anticipates that the European aviation authorities will work in complete symbiosis, with EASA being at the heart of a fully consistent European regulatory and safety system. His three main priorities over the coming year are: Firstly, a better internal functioning of the agency; secondly, promoting a more efficient use of the resources of the Agency and the National Aviation Authorities (NAAs) in order to increase the EASA “sphere of influence”; and thirdly, the involvement of the European Commission and the Members States in a strategic discussion on the future of the European aviation system.
Amy Hanna spoke to airside safety’s most pioneering providers about the innovative technologies that are enhancing safety at airfields around the world — and the importance of implementing optimal safety solutions.

Ingenuity and innovation are words that resonate throughout the airport industry, where concepts beyond imagining are entering into every aspect of the passenger and airfield process – the very incarnation of ‘state-of-the-art’. At airside, cutting-edge, intelligent technologies are enhancing operational safety at airports worldwide, and with environmental efficiency and economical expenditure so high on airport agendas, employing the optimum solutions in runway friction testing, ground lighting and wildlife dispersal is more important now than ever.

“The single greatest asset an airport has is its runway. Timely maintenance activities save time and money and minimise disruption,” said David Leask, Vice President Business Development of Dynatest, specialist manufacturer of friction and other compliance testing equipment. “Runways and taxiways are designed to allow the safe operation of aircraft in all operating conditions, including emergency situations. Key to this is the contact point between the aircraft and the runway and this is where friction is critical.”

Next generation friction testing

Factors such as adverse weather, surface materials and wear act as contaminants that serve to reduce a runway’s available friction, which left untreated could result in aircraft not being able to safely perform manoeuvres, emergency or routine. It is for this reason that the utilisation of state-of-the-art, new generation technologies that examine runway conditions is high-ranking in airports’ list of priorities.

The Dynatest Runway Friction Tester is fully integrated to a vehicle with all required equipment and a water tank for maintenance and compliance testing. All Dynatest friction data can be imported to its Airports Pavement Management System, which goes a stage further and consolidates many different parameters to provide optimised maintenance regimes.
Runway Friction Tester works on the ‘fixed slip’ principle, with a hydraulically braked measuring wheel operating at 14% slip to identify the effect of contaminants, allowing the necessary maintenance actions to be put in place. “Dynatest is leading in the integration of its friction testers with GPS and third party data that enables accurate and timely dissemination of contaminant locations during adverse weather, with enhanced awareness of changing airfield surface conditions,” Leask added. “This results not only in the quicker treatment of critical areas but a saving in the associated costs, and, through the optimised placing and use of chemical de-icers, a reduced environmental impact at the airport.”

By knowing accurately the position and extent of runway contaminants, maintenance can be applied in the correct location saving the airport time, enhancing traffic with reduced runway closures, and limiting expense. “The implications of an incident due to poor runway friction would do much more damage to an airport’s reputation than it would to its infrastructure. A runway can be resurfaced, but reputations would take years to rebuild,” added Paul Keating, Project Manager and Trials Engineer for independent runway friction surveyor Cranfield Aerospace. Utilising cutting-edge Douglas Mu-Meter technology and a custom modified tow vehicle, Cranfield Aerospace is deftly suited to annual or interim runway classifications, surveys following runway resurfacing or maintenance programmes, and for specialist investigations, such as the study of new materials or post accident investigations.

“All our surveys provide friction contour maps of the runway that can be used to highlight specific areas where the friction properties may not meet the requirements of the applicable standards,” Keating explained. “Detailed friction contour mapping allows airports to see individual areas of concern as they begin to arise. This may mean that only small areas of runway need maintenance, rather than fully resurfacing a whole runway. On the other hand, a friction survey may prove that a runway is operating better than expected, meaning that no additional work is required.”

Runway friction testing provides evidence, as well as reassurance, that an airfield’s runway is in good health and still meets the friction requirements set out by governing bodies. Regular monitoring can also be used to highlight areas of concern on the runway and notify operators when their runway is dropping in performance, thus allowing airports time to react long before it becomes unsafe.

Frederik Graffind, General Manager, ASFT, said: “The most important benefit of runway friction testing is that it can prevent overrun, which in the best case result in high costs and in the worst case, casualties. Having reliable and reproducible measuring results is of utmost importance, as airport operators need to be sure that the information they are receiving and using in their daily work is accurate.” ASFT, a world leading developer and manufacturer of Continuous Friction Measuring Equipment, Runway Weather Information Systems (RWIS), and Early Ice Warning Systems, has one of the most reliable reproducibility records in the friction testing industry. Boosting solutions that are at the forefront of innovation, it has developed unique sensors that identify runway conditions in potentially hazardous weather. The Frensor® freezing point sensor needs no calibration and works on any type of deicing and composition, while OpticEye® is the only precipitation sensor that can detect and classify very fine rain. “ASFT systems are making a daily difference at airports all over the world. Its friction testers are making airports safer to operate, while its Early Ice Warning System combined with RWIS is making them 30% more efficient, which is translated into 30% less cost and 30% more environmental efficiency,” Graffind said.

**Long-term planning**

As well as the threat of compromised runway surfaces, airports face an array of challenges to airside safety, including the incursion of hazardous wildlife. The newest technology in bioacoustics has for many years been used to disperse birds, and mitigate the ever-present risk of bird strike. “The basic theory...
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remains the same today as it did some 20 years ago when the first system was produced. Since then technology has enabled the broadcast to be much improved, with the quality of both recording and playback becoming as close to the real thing as possible; this enhances the end result, with appropriate species dispersal,” said David Randell, Director of Scarecrow Bio-Acoustic Systems.

One of the industry’s most major developments was the launch of Scarecrow Bio-Acoustic Systems’ Ultima Bird Dispersal and Reporting software, which then provided the first fully-integrated bird dispersal and data logging system, to incorporate reporting software. Now this system uses a vehicle mounted PC tablet with touch screen technology for ease of use, and most recently, Scarecrow Bio-Acoustic Systems has developed the Threshold Risk Management Module, designed to aid management and save time by using an ‘at a glance’ traffic light system for evaluating the level of risk from the data collected by field operatives, per species, against pre-determined and user configurable threshold levels. “It will provide information to enable management to focus on the priority issues first, and its user configurable input can be amended at any time to enable the airport management to strive for continuous improvement,” Randell commented.

Substantial weight is accorded, by airports and suppliers alike, to the use of safety solutions that enable ongoing operational improvement while also allowing for continuous profitability. “Airports face many challenges today, of which the most important is to stay profitable long-term. Operationally the major challenges emanate from how to sustain and in the long term increase existing capacity not only under ideal conditions but for virtually all operational conditions,” explained Ola Håkansson, Director – New Technologies at airport safety solutions specialist Safegate Group. “In order to fully leverage existing and future potential the airport will have to look beyond individual systems, processes and organisational borders. The level of integration will increase but most importantly focus will have to shift from systems and technology to the processes involved in handling the traffic and the passenger flow through the airport.”

Safegate Group specialises in providing an array of solutions that support increased efficiency and safety, command in the long term increase existing capacity not only under ideal conditions but for virtually all operational conditions,” explained Kevin Armstrong, Sales & Marketing Director, atg airports. “LEDs possess various attributes which make them suitable for use in airfield lighting circuits including increased lifetime, lower power consumption which helps reduce the airport’s carbon footprint, along with reduced maintenance requirements.”

Airfield lighting’s bright future in LEDs

Airfield Ground Lighting (AGL) is an airside safety critical component which helps pilots safely land and manoeuvre around an airfield. Increasingly cutting-edge and ecological illuminating solutions are emerging onto aprons, taxiways and runways, emphasising a reduction in airport carbon emissions, as well as reduced costs, as suppliers work to provide sustainable platforms for their customers to achieve the highest environmental standards. “The traditional technology used for lighting airfields is Tungsten Halogen, however, as technical advances occur, it is now gradually being phased out in favour of the LED (Light Emitting Diode),” said Kevin Armstrong, Sales & Marketing Director, atg airports. “LEDs possess various attributes which make them suitable for use in airfield lighting systems, atg airports is the only UK-based specialist manufacturer and installer of AGL, and has provided solutions to 576 International Civil & Military Airfields in 107 countries over the last two decades. IRIS, atg’s market-leading range of High Intensity LED airfield lighting fittings, is setting the standard in airfield lighting. “IRIS’s state-of-the-art technology includes a number of innovative features designed to make airfield maintenance quicker and easier,” explained Armstrong. The introduction of an optical cartridge as a housing for the prism allows for the unit to be replaced quickly, providing a commonality of parts which will significantly reduce the spares holding of the airport. The ultra-low profile design of the
IRIS range, which has no negative slope, helps to improve the ride comfort for airline passengers and reduce the impact on landing gear minimising any aircraft damage.

ADB Airfield Solutions, a world leader in airfield lighting, offers a comprehensive range of visual guidance solutions, including AD Lights – easy-to-maintain, environment-friendly and cost-efficient LED fixtures for various AGL applications including the taxiway and runway, touchdown zones and guard lights – and guidance signs, which provide visual directions to taxing aircraft and airport vehicles. One of the first to begin developing the technology for an airfield environment, ADB has pioneered the use of energy efficient LEDs for airfield lighting, with over 500,000 LED solutions installed at more than 450 airports globally and its range of solutions implemented at 2,000 airports in 175 countries. The provider also offers full end-to-end services, ranging from AGL design to products and solutions, system engineering and consulting services, to help airports manage their carbon footprint by reducing power usage and address the complexity of operations.

“We expect the transition from incandescent, traditional lighting to LED to occur gradually, with airports first installing LED lighting at the most crucial areas such as taxiways and runways, and then approach. As airports upgrade and modernise their airfield lighting infrastructure, they will be cognisant of the immense benefits of LEDs both from sustainability and cost viewpoints, and migrate to LED technology,” said CEO Onselaere. “Our solar solutions emphasise the use of clean, alternative energy sources to reduce carbon emissions from use of conventional power sources. Apart from enabling up to 84% energy savings (compared to incandescent lights), our LED range is low maintenance and provides greater operational efficiencies. In effect, this translates to lower labour costs, lesser vehicular movement and lower fuel costs. Our power systems offer more energy-efficient ways of distributing power to the different lights and systems,” he concluded.

ASFT systems are making a difference daily at airports and on roads all over the world. Its friction testers are making airports safer to operate, and its Early Ice Warning System, combined with RWIS, is making them 30% more efficient, which translates into 30% less cost and 30% more environmental efficiency.
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Following the bitter weather conditions experienced across Europe in recent years, the procurement of solutions that will keep operations running through winter is high on airport agendas. Amy Hanna spoke to the industry’s experts about the most innovative deicing tools on the market.

**PREPARING FOR THE BIG FREEZE**

Across Europe, the winter conditions of recent years can be distinguished by their diverse unpredictability. From bitingly glacial to foggy and inclement, it is clear that in the winter months Europe’s airports must be prepared for every possible incidence where weather is concerned. An airport’s capability to maintain operations in even the fiercest weather is increasingly serving as an estimation of its quality – those with reduced delays, less waiting, and fewer cancellations becoming the terminals of choice for carriers and passengers – while cancelled services can mean sacrificing thousands in lost revenues and productivity.

“Many airports are judged on their readiness for winter(3,8),(992,989)

operations, so the better the systems they have in place the better the ratings they will get from users and passengers. Safety must never be compromised, so with better systems available, airports will be able to operate as close to normal as possible even during a snowstorm,” said Lars Barsæe, Sales Manager, Vestergaard, whose industry-leading Elephant deicing vehicles ensure stable handling and safe aircraft take-offs.

Continuing to drive forward innovation in the industry, Vestergaard has developed a solution that enables the ultimate in accurate deicing. Its Precise Positioning System (PPS) anchors the nozzle at one metre from an aircraft surface, using sensors to ensure that the nozzle does not touch the aircraft surface when engaged. The system aids the operator to stay within this most optimal distance, helping to save on both fluids and time needed for the deicing operation.

“The PPS saves on fluids and thus energy and environment,” Barsæe commented. “Because the system also speeds up the deicing, there will be less taxing and waiting with engines running, again saving the environment, and decreasing congestion on aprons.”

Vestergaard’s enterprising solutions are also benefiting its clients financially. Its ‘hot-at-nozzle’ feature ensures hot fluids at the nozzle at all times – even following a break – so an operator does not waste 40-50 litres when a new deicing job is started.

Deicing fluids are instrumental in ensuring that airports can keep the level of disruption to a minimum in the face of severe weather, and in guaranteeing a safe take-off. Gary Lydiate, Chief Executive of trailblazing anti/deicer manufacturer Kilfrost, explained: “Frozen contaminants can cause aircraft wings to be coarse and uneven, disrupting the smooth flow of air, increasing drag and reducing the ability to generate lift. In addition, if large blocks of ice become dislodged during take-off, this presents a serious risk to engines and propellers. It is also essential that engine inlets and sensors on the exterior of an aircraft are free from ice or snow.”

Trusted by major airports, airlines and ground handling crews across the globe for more than 80 years, Kilfrost supplies an industry-leading range of Type I, Type II and Type IV glycol fluids – including the world’s first bio-derived sustainable fluid, Kilfrost DFsustainable – and also offers training and support to its customers. Kilfrost has worked closely with China Eastern Airlines, for example, in the establishment of its own laboratory for analysing the quality of de/anti-icing fluids. As well as offering training on the testing methods available, Kilfrost has also advised the company on how to meet European regulations.

During the 2012/2013 winter period Kilfrost, which currently manages a third of the world’s aircraft de/anti-icing fluid needs, delivered over 1,400 tankers of fluid to airports worldwide, and its latest innovation goes even further in ensuring the best performance of its de/anti-icing fluids. “It is essential that the correct ratio of inhibited glycol fluid to water is calculated to enable optimum performance of de/anti-icing fluids,” Lydiate said. “Consequently, Kilfrost recently launched the Freeze Point Calculator tool, which enables the user to quickly and efficiently determine an accurate freeze point dilution rate. This will ensure that the correct dilution of de/anti-icing fluid is applied to an aircraft when cold weather hits.”

The new device will save valuable time, and can be used in the field so that airport operation is maintained at all times and especially during harsh winter conditions, keeping aircraft moving in even the deepest freeze.
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PRM SERVICES

Airports’ efforts to provide a seamless, enjoyable customer experience include comprehensive assistance to Passengers with Reduced Mobility (PRMs). Here, Ross Falconer examines some of the latest developments from two key service providers.

Omniserv innovates at Heathrow

Omniserv, the European division of AirServ, is London-Heathrow and Glasgow airports’ PRM assistance provider of choice, helping around one million passengers each year.

Last year’s Paralympic Games in London showcased the effectiveness of the PRM services at Heathrow. Antony Marke, Director of Passenger Services, Omniserv, commented: “We planned it for nine months and installed a Project Manager to work alongside Heathrow and LOCOG (London Organising Committee of the Olympic and Paralympic Games). It was hugely successful from the point of view of both departing and arriving passengers. We received commendations from Heathrow CEO Colin Matthews and Lord Coe on our service. There was no disruption to business as usual operations and no delays.”

On the busiest day, 10 September 2012, there were more than 6,000 departing PRMs handled, including Paralympic athletes and officials.

It was recently announced that Omniserv is also partnering with Heathrow on its Passenger Service Ambassador programme, which Marke explained is another innovative enhancement of the passenger experience. Omniserv is providing hundreds of ‘ambassadors’, who proudly wear a Heathrow-branded uniform and are equipped with tablet devices, across Heathrow’s four terminals. The Omniserv ambassadors, many of whom are multi-lingual, provide a variety of support services, including informational hosting, check-in assistance, compliance handling, flight connections assistance and e-passport support.

Marke added that in order to ensure these critical passenger services are delivered with unsurpassed customer care in mind, Omniserv is collaborating with leadership and service specialists Ritz Carlton Group to train service ambassadors on best practices aimed at further enhancing the passenger experience at Heathrow. He commented: “We are looking to put frontline staff through this to be more anticipatory of passenger needs. Providing this type of training to everyone with customer contact will help Heathrow’s passengers have a smooth journey through the airport.”

Omniserv is leveraging its customised technological solutions, with its ambassadors carrying tablet devices enabling real-time reporting of what is happening across the airport’s terminals – from queue times to frequently asked traveller questions.

Marke also explained that Omniserv has a staff recognition programme known as the 110% Club, created to motivate and reward the workforce. Staff accumulate points for various categories of great service and are recognised at an annual dinner.

CPH signs new PRM services agreement

Copenhagen Airport has entered into a new three-year agreement for Falck to continue providing PRM services, ensuring enhanced services for the 100,000 passengers per year requiring special assistance.

“We put the arrangement out to tender, and Falck submitted the best offer overall. This outcome is a very positive one for us as well as for the airlines and the passengers, because in the past five years the service level has been high, and with the new agreement it will be even higher. For example, Falck will upgrade its offering of assistance equipment, and at a more competitive price,” explained Kristian Durhuus, COO of Copenhagen Airport.

Allan Segaard Larsen, CEO of Falck, added: “We are proud to have successfully provided Copenhagen Airport with this important service over the past five years and we look forward to continue assisting disabled passengers through the airport.”
As passenger traffic to one of Ukraine’s most inviting cities continues to escalate, the redevelopment of Odessa International Airport is providing a state-of-the-art platform for growth. The airport’s newly appointed Director Vitaliy Portyanko gave Amy Hanna an exclusive insight into the expansion of the dynamically developing airport, and the construction of the new passenger terminal that is set to transform its operations.

Now Odessa International Airport is redeveloping to meet the needs of its burgeoning passenger numbers, and enable the airport, and the city, to realise its full potential. Its impressive new terminal, implemented by the previous administration led by Oleksiy Kochanov (now Director General of Kyiv Boryspill), is in the active stage of construction, and, when completed, the cutting-edge infrastructure will provide an optimum environment for its consistently growing number of visitors and increasing airline traffic.

In the last year-and-a-half nine new airlines have begun regular services from Odessa International Airport, bringing the total number of carriers to have established operations at the enterprising regional hub up to around 15 since 2010. The airport is, in fact, experiencing exponential growth in every area of its operations, and continues to gather momentum, with passenger traffic in an upward spiral that shows no signs of slowing. In the seven months between January and July, Odessa Airport handled close to 580,000 passengers, a +19% increase on the previous year’s period. The +24% rise in passengers on international flights – to almost 480,000 – serving as a telling indication of the beguiling Black Sea port city’s soaring popularity with tourists, and with throughput expected to reach more than one million by the end of the year, passenger numbers have ballooned to far exceed its current capacity.

The €45 million, two-storey terminal will be 28,000sqm in size when it is completed – around three times as large as the previous structure – and have the capacity to handle more than two million passengers per year. The construction of the building’s concrete framework has already been accomplished, and now the entirely Odessan workforce has begun the installation of the roof and glass façade. In August of this year Oleksandr Vilkul, Ukraine’s Vice Prime Minister and Chief of State Commission for Technogenic and Ecological Safety and Emergency Situation, confirmed that the construction of Odessa’s new 2,800m runway would begin towards the end of 2013.
business. Since his appointment to the role of Airport Director in August, Portyanko’s emphasis has been on developing a strategy that will exploit with maximum efficacy the state-of-the-art facilities that the airport will soon receive.

“We hope that the new terminal will be more than just a building, but will be aware that Europe is not standing and waiting – all of its hubs are developing too, developing new technologies and techniques and equipment,” Portyanko said. “Task number one for us is to generate new business areas; become a business field that will meet the needs of all of our current and future carriers. We have prepared for the possibility that our aviation climate will change – with more domestic flights, or a growth in transit flights for example – by implementing a model that allows for future development depending on the need of our airlines in five or 10 years, or more.”

Looking to the future

“We want to create a comfortable airport environment both for airline business and for our passengers – this is our main priority. Odessa is a very friendly and welcoming city, and we want to capture its essence in our new terminal,” Portyanko continued. Amongst locals of the air, green resort region is a popular expression – ‘you can breathe in Odessa’ – the significance of which is encapsulated in the design of its spacious new airport. The €45 million, two-storey terminal will be 28,000sqm in size when it is completed – around three times as large as the previous structure – and have the capacity to handle more than two million passengers per year. The construction of the building’s concrete framework has already been accomplished, and now the entire Odessan workforce has begun the installation of the roof and glass façade.

The new terminal will greatly enhance Odessa’s passenger processing capabilities. While currently inbound domestic passengers collect their baggage from a sheltered area outside of the airport, the new structure incorporates two baggage carousels in arrivals – one for domestic and one for international passengers – as well as 16 check-in desks, and the new airport will embrace new technologies in every aspect of its transformed passenger experience. “As we speak there is a commission in operation, a group of professionals who are developing new technologies for us, to cover all areas of the passenger process,” Portyanko explained. “We are not looking at today’s technology but are looking towards the future, looking to develop and acquire those technologies that will be used tomorrow. Our focus at this point is on adopting automated check-in processes, and at present we are looking at implementing the best facilities for self check-in and self bag-drop. We want to be at the forefront of aviation, and the future is the direction we are headed in.”

Preparation for the future is at the crux of Odessa’s extensive expansion strategy, and when operations begin the transition from the old to the new terminal from May to September next year, the first stage of the development will be complete. It is planned that in the coming years two more terminals will also be incorporated into ODS’ broadening infrastructure.

Construction is also soon to begin on the airport’s new runway. At 2,800m in length, it will be capable of accommodating aircraft of all types including, for the first time, large long-haul craft. “Now we have a brand new terminal in the active phase of construction, and a runway about to be, we need to continue in this direction, and need to work on developing our air passenger traffic and routes in accordance with this growth,” Portyanko said.

The instruments for major development

The new terminal will engender a multitude of new opportunities for Odessa, and is the key the continued prosperity of the airport and the region. Portyanko explained that the airport continues to demonstrate to airlines and passengers the clear potential that Odessa has to offer. A principal aspect of his plans for development is to establish Odessa not only as a seasonal airport, popular with tourists in the summer months, but as a key network destination all year round.

“We want to show airlines that there is interest from passengers, and therefore airlines, all year long. We have constant traffic all year round, not only tourism in summer but business activities and transit traffic to Europe and Russia,” Portyanko said. The airport is currently in negotiations with Lufthansa on the initiation of a year-round schedule of flights that includes daily services in the winter. Siberian airline S7 meanwhile has increased the frequency of its Moscow Domodedovo to a daily service, and flydubai has launched a Dubai International route. “We welcome the new carrier and we are very happy that it is here. We hope it won’t only be seasonal, but that it will offer flights all year round,” Portyanko said.

In his first few months as Airport Director, continuing to expand the airport’s route network and develop more frequent domestic and international connections is high on Portyanko’s agenda, and correspondingly, interest from carriers in Odessa continues to swell. The region is over-spilling with touristic opportunity, boasting one of Europe’s best-loved opera houses, and as it continues to blossom there is growing demand among passengers for connections to the city. Portyanko is now in the process of developing its two-way model of cooperation, with benefits to further enhance the relationship with new and existing airlines, and with the modern infrastructure that will be brought to the airport by the new terminal, at Odessa the pieces are in place to fulfill major future market demand.

“It is now 22 years since the day of liberation when Ukraine gained its independence, and lots of new airports have been opened in recent years – big projects that are not just promises; they exist and they work, they have very good infrastructures and they can offer a lot to airlines and to passengers. In Ukraine we now have the instruments in place for major development, for growing our number of routes, carriers and passengers as well,” Portyanko said. “Now, for Ukraine’s airports, open skies is the foremost factor that will affect our further development. Ukrainian airlines may well be concerned that open skies will increase competition with Western carriers, but that is where our new model of airline-airport cooperation will come into play, and will help to develop both markets, to develop airlines and routes and traffic for the airport,” he concluded.

Portyanko: “We want to show airlines that there is interest from passengers, and therefore airlines, all year long. We have constant traffic all year round, not only tourism in summer but business activities and transit traffic to Europe and Russia.”
The stabilisation of the Ukrainian economy has, in recent years, paved the way for the exciting transformation of its air transport industry. As its people become increasingly more mobile and competition escalates, development is erupting across its airport landscape. Oleksiy Kochanov is one of the visionaries behind the continued development of Ukrainian aviation, and, in his new role as Director General of Kyiv Boryspil, is leading Ukraine’s busiest airport into its position as one of Eastern Europe’s most promising hubs.

The Ukrainian aviation industry is transforming. Exponential development is taking place at airports across the country, where popularity with tourists has prospered since it hosted the EURO 2012 tournament, and continues to flourish as visitors are seduced by the cornucopia of mountains, beaches and spas just a short distance from its cosmopolitan capital. The expansion of the industry is key to the country’s continuing growth and independence, and though obstacles still stand in the way of fully liberalised operations, its airports and airlines are on a mission to increase competition, educate passengers and amend the regulatory stumbling blocks that are curbing their expansion worldwide.

Its airports aren’t just catching up with the standards set by rest of the world, but are also implementing industry-leading innovations and ingenuity, with the modern new Terminal D at Kyiv Boryspil International Airport serving as a shining glass and steel symbol of the potential of the nation’s hubs. The state-owned airport currently handles around 60% of the nation’s air traffic, and with its updated infrastructure providing a state-of-the-art platform for its continually escalating passenger numbers, airlines are champing at the bit to establish bases at Boryspil.

“I think Ukrainian civil aviation has great prospects,” Kochanov explained. “Boryspil Airport has huge potential because it has so much available capacity within the newly created infrastructure.” The new Terminal D is close to twice the size of the 60,000sqm airport that preceded it, boasting abundant space and the industry’s most innovative features for the airport’s 8.5 million yearly passengers. “I have spent all my life working in aviation, and now I see a lot of unrealised potential that I will try to make the best use of, working together with the Ministry of Infrastructure and the government. The last few years have seen the ongoing construction of a number of new terminals here – in Kiev, Lviv, Donetsk, Odessa and Kharkiv, as well as Boryspil – and we now have all the infrastructure to speed up the development of aviation in Ukraine.”

It is hoped that by the end of this year the European Union will come to an agreement with the aviation authorities of Ukraine in the signing of the Open Skies Agreement, which will give renewed impetus to the nation’s entire aviation industry.
Kiev’s game-changing new terminal

2012 was a milestone year for Boryspil International Airport; the unveiling of its sophisticated new Terminal D opened myriad new and auspicious opportunities for the hub. “Terminal D is one of the most state-of-the-art terminals in Europe,” Kochanov said. “We have implemented the most modern of systems, such as the climate control systems, check-in and customs technologies, and safety systems.”

The 107,000sqm terminal complex is the largest in Ukraine, and is capable of handling more than 15 million passengers a year. It has 60 check-in desks and spacious concourse areas, while 11 new boarding bridges have maximised the potential of the airport’s unique dual runway infrastructure, and been developed with long-term expansion in mind. The bridges are equipped with an automatic aircraft docking system to decrease docking time, and a visual guidance system is also in place to enhance efficiency in poor weather.

The passenger was at the heart of the new terminal’s development, one aspect of which is the implementation of an automated e-Gate system with RFID technology, which enables passengers to pass through customs in 20-30 seconds, reducing the time taken for immigration processes by -80%.

Working together with the customs and border services of Ukraine we are developing a working schedule which has taken into account the peak times of operation in the airport,” added Kochanov. “Together with several of our airlines we have worked out preliminary registration schemes which allow passengers to register via the internet without entering the airport. Today we are going to great lengths to reduce the time passengers spend in the check-in zone or waiting for registration so that they can spend more time in the airport’s restaurants and cafés.”

The airport has also installed multi-use self check-in kiosks for passengers travelling with KLM, British Airways, Air France, Lufthansa, Austrian Airlines, Rossiya Airlines and Turkish Airlines, with another three airlines set to join the system before the end of the year. “We have free WiFi access too,” Kochanov said. “The system is extremely popular, and we have about three million connections every year. We are trying to be as modern as we can, to think ahead of time and put a lot of effort into educating our staff so that we are not lagging behind the current state of aviation.”

Opened in May 2012, weeks before the EURO 2012 tournament in Kiev, the terminal’s first great trial was ensuring the safety and swift processing of hundreds of thousands of tourists, and the tournament also brought with it a more competitive industry environment, with the opening of Kiev’s newly redeveloped second airport, International Airport Kyiv. Despite competition, Boryspil’s passenger traffic continues to multiply, and with its new infrastructure almost complete, its emphasis is now on developing connections with more and more airlines, and realising further growth.

Continuing growth

In his previous role as CEO of the nearby Odessa International Airport, Kochanov attracted more than 15 international airlines to the airport, elevated its throughput to become the third highest in the country, and initiated the terminal development which is currently underway. After just weeks as Director General at Boryspil Airport, he has applied his enterprise and drive to operations at the Kiev hub.

Kochanov said: “Before I came to Boryspil a lot of beneficial projects had already been accomplished, and the airport had been greatly developed. However, the efforts of the previous administration concentrated on the construction of the new terminal ahead of EURO 2012, and there was no finalised picture created of how the airport should function upon the completion of the Terminal D. As a result, Boryspil has received a state-of-the-art new complex that is in no way related to and can in no way cooperate with the other existing terminals.”

Kochanov’s goal is now to create a connection between the new and
existing terminals. “In the first three weeks of our work my team and I have managed to create an improvement programme and have it approved by the Ministry of Infrastructure and the airport’s major carriers. According to the scheme, all internal Ukrainian flights will be transferred from Terminal B to Terminal D. We have also created transfer capacities for those passengers transferring from Ukrainian flights to international and vice versa.” Terminal B, meanwhile, will be transformed into a specialist terminal for low-cost carriers and chartered flights, while Terminal F will be transformed into a cargo terminal.

“As with any other airport, Boryspil’s ultimate goal is to serve more and more passengers. Our main aim is to increase throughput by +15% compared to the current numbers. We’re expecting eight million passengers to use the airport by the end of 2013, and in the following year we expect a few more than nine million, with a view to raising passenger numbers by more than +20% in the next two to three years,” Kochanov said.

New horizons

The improved infrastructure at Boryspil has captured the interest of a wealth of carriers. Beginning on 27 November, SWISS Air will resume a regular service from Zürich to Boryspil, while starting from 14 January, Emirates will provide daily flights from Dubai to the Kiev hub. “The airline’s decision to initiate this flight was due to our modern new facilities,” Kochanov said, “and it will be the first airline to offer a first class service to passengers flying from Ukraine. We are currently in negotiations with around 50 international carriers with regards to establishing Boryspil as a base. I think as a result of our efforts we’ll see a lot of new carriers and flights, and I hope we’ll soon have the pleasure of offering an array of new directions and routes to our passengers.”

The airport’s pioneering growth and development has not been without challenges though. Legislative limitations have, in certain areas, formed barriers to network and infrastructure development. “We have witnessed the steady development of the Ukrainian economy in recent years. We have seen stability in the exchange rate and as a result we are seeing an increase in the mobility of Ukrainians – more and more people are starting to use airlines. However, the presence of several restrictions such as visa regulations related to several European countries, and many other countries internationally, are containing the further development of Ukrainian aviation. How fast Ukraine integrates into the European environment on a large scale will define how quickly the Ukrainian aviation industry is allowed to progress.”

It is hoped that by the end of this year the European Union will come to an agreement with the aviation authorities of Ukraine in the signing of the Open Skies Agreement, which will give renewed impetus to the nation’s entire aviation industry. “The signing of this agreement will open new horizons both for Boryspil and for Ukrainian aviation in general,” Kochanov said. “Moreover, we pin our hopes on our national airlines. At the beginning of the year the situation with AeroSvit evoked some doubts about the prospects of Ukrainian aviation. But positive changes later this year have made experts rather optimistic. Ukrainian International Airlines has extended its fleet and geography of flights; RozaVetrov (Wind Rose) reinforced its fleet with a long-range aircraft; the new air carrier Kharkov Airlines was registered, and acquired a wide-body aircraft. All these events have opened good perspectives for Ukrainian aviation in general and for our airport in particular,” Kochanov concluded.

Street Food — Bringing a Local Flavour

The airports with the most enviable reputations are those that not only successfully evoke the atmosphere and culture of the region they serve, but also those that reflect the current trends. This applies to design, the retail landscape, and the overall customer experience – restaurants and bars are no exception.

It’s on the streets where the serious foodie will often find the best of the exciting flavours that are enjoyed by the most savvy locals. But how can these be used to add sparkle to an airport’s F&B offer?

Over many decades, SSP has honed the skill of bringing the best of a region’s cuisine to the airport. This includes street food, and earlier this year, its Street Food brand, created with Marcus Samuelsson, made its first US appearance at New York’s JFK airport. By definition street food is portable, which means it can work well in a busy terminal. It’s seasonal, which helps make it local too – so it’s the perfect choice for an airport looking to underscore the unique attributes of the region it serves.

Another of the appeals of street food is its ephemeral nature – the fantastic van on a Norfolk shore selling sandwiches of freshly caught Cromer crab that is there one weekend and might not be there the next. All of these charms have been captured at Manchester Airport, where a series of pop-up concepts means passengers are able to sample some of the best of the city’s street foods. The first of these is a concept called Ginger’s Comfort Emporium, which serves award-winning hand-made ice creams. More exciting concepts are planned. SSP is currently working with the creators of the most traditional of UK staples to the spiciest flavours of the cosmopolitan community to explore new ideas for Manchester and other airports across the UK.

Of course scaling up an operation from the pavement to the terminal requires considerable skill and ensuring a brand can meet the stringent demands of the travel environment is strictly for the experienced. However, done well, the colour it can add to a terminal makes it a very worthwhile venture.
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INTERVIEW
Dr. Michael Kerkloh,
CEO, Munich Airport

SEE US IN MUNICH ON STAND B5/1638
MUNICH CELEBRATES TOPPING-OUT OF T2 SATELLITE

Munich Airport is developing a state-of-the-art new Terminal 2 satellite building, as increasing passenger numbers create demand for additional capacity. Dr. Michael Kerkloh, Munich Airport CEO, outlined the development to Ross Falconer.

Munich Airport handled a record 38.4 million passengers in 2012 and growth has continued in 2013, with a record 18.6 million passengers handled in the first half of the year.

Munich Airport achieved a new passenger record of 18.6 million for the first half of 2013, with more capacity offered by Lufthansa and other airlines, and an increased average load factor of 74.5%. It follows a record 2012, in which 38.4 million passengers were handled (+1.8% year-on-year), and points to further growth this year. This success mirrors the general business environment in the Munich region, which is experiencing strong economic growth. Bavaria is one of Europe’s most successful regions, with a highly export-driven economy that makes it reliant on good access to air transport. The high quality connections provided by Munich airport help sustain the region’s economic strength and continued growth. Indeed, the airport is an employment engine, supporting 32,000 jobs — up by 2,800 since 2009.

The airport is responding to growth with the new Terminal 2 satellite, which will provide capacity for an additional 11 million passengers per year when it opens in 2015. The €650 million project is being funded by Munich Airport and Lufthansa on a 60:40 basis, in a similar arrangement to the original Terminal 2 development. The topping-out ceremony for the facility — the first midfield terminal to go into operation at a German airport — took place in September.

“The project is on schedule; the traffic lights are on green,” commented Dr. Kerkloh. He added that the second stage of the satellite development is already masterplanned: “This is a built-in option of the satellite, and would increase the total annual passenger capacity to 17 million. With that order of magnitude, we cannot overstate the importance of the satellite for the future development of our airport.”

Munich’s strategic potential

This expansion of Terminal 2, which is operated jointly by Munich Airport and Lufthansa, is necessary because its capacity of 25 million passengers per year is now stretched to the limit. The 10th anniversary of Terminal 2 was celebrated in June — in that time, 225 million travellers have used the terminal. “This terminal has yielded huge benefits for our airport by enhancing its appeal and adding to its clout. Until June 28, 2003, this was an impressive medium-sized international

Dr. Kerkloh:

“We have a lot of strategic potential and the satellite is the next step in establishing Munich Airport as one of the main European hubs. Overall capacity with the satellite will be 50 million passengers per year.”
airport, both architecturally and from a functional standpoint. With the launch of the new terminal, we became a thriving air transportation hub ranked alongside Europe's top airports," explained Dr. Kerkloh. The statistics underline the success of the facility: in its 10 years of operation, the annual passenger volume has risen from 16 million to 27 million. In 2003 Lufthansa was serving 71 destinations from Munich; today it serves 125. Meanwhile, long-haul services, which are so vital to Bavaria and its export-driven economy, have almost tripled from eight to 23.

The satellite facility is being built on top of the baggage sorting hall on the airport's eastern apron as a functional element of Terminal 2, and will have 52 departure gates. It is not a standalone terminal, as it has no landside transportation links; passengers arriving or departing through the satellite will use the check-in and baggage reclaim facilities in the main Terminal 2. The two buildings will be linked by an underground personal transportation system (PTS).

"We have a lot of strategic potential and the satellite is the next step in establishing Munich Airport as one of the main European hubs. Overall capacity with the satellite will be 50 million passengers per year. The satellite provides 27 new air bridges and contact stands – more than doubling the current number of positions linked to Terminal 2 via passenger bridges. This will accommodate most of the aircraft that currently have to be handled on remote stands," added Dr. Kerkloh.

He also highlighted the lounge facilities – the five Lufthansa lounges in the satellite will double the number of lounges available in and around Terminal 2. "Munich Airport has a fairly high proportion of high yield passengers. The new satellite will provide these facilities to a very high standard," he commented.

A 9,000sqm area is dedicated to retail and F&B, and with the open layout filled with natural light, and the wide variety of shops, the satellite will offer an excellent passenger experience.

As Dr. Kerkloh explained, the project is progressing on schedule. The façade is under construction, and the interior work and installation of technical equipment is also underway. Meanwhile, seven connecting structures for the new passenger bridges have already been installed.

**Ambitious environmental agenda**

Munich Airport has a strict environmental agenda, and is accredited at Level 3 – Optimisation – of ACI EUROPE's Airport Carbon Accreditation programme. In 2012, it also became the first German airport to sign-up to the German Sustainability Code (DNK), which now has more than 50 listed and mid-sized corporations from various sectors among its members – all with ambitious sustainability targets within their corporate strategies. The airport’s stated goal, since 2010, has been to become one of the world’s most sustainable hub airports by 2015. The new satellite has been designed in accordance with sustainable construction principles – its carbon footprint will show a 40% improvement over the airport’s two existing terminals.

The new satellite building takes the Bavarian hub to a new dimension. It is a vital step not only in the future growth of Terminal 2 and Lufthansa’s operations at Munich, but for the airport as a whole, further enhancing the passenger experience.
Baggage handlers may move as many as 600 bags during a shift, lifting them on and off transport belts or loading them into carts and containers.

Robot loading is one of the solutions that are available to deal with the problems of heavy lifting, but with its relatively high costs and complexity this option is most suitable for larger airports. More employable is a compact lifting aid that can be used where and when it is needed.

Ideally such a device should be a true loading aid that does not need special controls to operate it – it should just work intuitively, simply supporting the normal task of the handler and not slowing them down while taking out the heavy lifting. One device that does just that is Vanderlande Industries’ STACK@EASE. This new device will have its first public showing at the Inter Airport Europe exhibition in Munich from 8-11 October.

Stand B5/1030

Vanderlande Industries’ STACK@EASE device is a highly flexible loading aid solution that takes the heavy lifting out of loading in baggage handling environments. It helps operators to load containers and carts productively, and minimises their physical workload, even over longer working periods. By doing so it greatly reduces the risk of strain and injuries caused by heavy lifting tasks.

WORLD-LEADING NOISE AND ENVIRONMENT MONITORING

Brüel & Kjær, with a client base of over 250 airports worldwide, is a world leader in the supply of noise and environment monitoring to airports. Its broad and deep range of systems and services provide noise monitoring, compliance reporting, emissions management and community engagement to help expand environmental capacity and build strong relationships with local communities. The range of products includes:

- The most advanced and sophisticated Airport Noise and Operations Monitoring System – ANOMS;
- The NoiseDesk subscription service for regional airports who want noise management made easy;
- The WebTrak and WebTrak MyNeighbourhood community engagement and self-investigation solutions;
- The AirTrak Emissions management solution that enables the airport to calculate emissions based on actual flight tracks; and
- A suite of NoiseOffice services that ensures data is beyond question.

Brüel & Kjær’s noise monitoring units are specifically designed for outdoor use in a variety of climates and come in both permanent and portable variants.

Continual improvement based on feedback from clients – some of the world’s biggest airports – ensures state-of-the-art and robust solutions for all noise monitoring requirements.

Stand B5/1122
ZODIAC ARRESTING SYSTEMS — THE WORLD’S LEADING AUTHORITY ON ENERGY ABSORPTION

A perfect safety record is the superlative demonstration of an industry-leading product, and, in the eight aircraft overruns that a Zodiac Arresting Systems EMAS has obstructed, every craft was successfully engaged with minimal to no damage, causing no injuries to its passengers.

The Zodiac Arresting Systems EMAS (Engineered Material Arresting System) is the first and only engineered aircraft arresting system that has been certified for commercial airport runway areas, and is capable of arresting everything from a 787 to a regional jet. “Zodiac Arresting Systems has spent millions of dollars and many years perfecting its unique product, something evident in its 100% successful stopping record,” said Kevin Quan, Vice President, Sales and Marketing.

Consisting of thousands of blocks composed of a lightweight concrete designed to fail under the weight of an aircraft, the EMAS has been installed in 77 airports worldwide, ensuring the highest degree of safety. “Every bed is different, customised to each airport’s needs, the amount of space available, and the fleet that operates on its runway,” Quan explained. Should an aircraft overrun a runway it will crush the blocks and decelerate and, because it relies on the interaction between the aircraft’s power and the EMAS’ materials, the slowing is uninhibited by friction levels.

“If you look at a lot of the safety areas at the end of runways, you have a lot of situations where airports are really constrained — perhaps by a body of water or a highway. The EMAS means that runway overrun areas can be far shorter in length, allowing an airport to make best use of its space without making expensive extensions to the runway, as well as guaranteeing maximum safety,” Quan added. Most recently, the manufacturer is creating bespoke systems with San Francisco, Fort Lauderdale and Washington airports. 

Stand B6/422

SHAPING THE AIRPORTS OF TOMORROW

Cavotec is a leading system designer, manufacturer and integrator for the global airports sector. Working closely with airports, airlines and industry bodies, it manufactures a comprehensive range of advanced GSE that includes 400Hz power supply, pre-conditioned air, refuelling and wet services systems housed in underground pits, tunnel systems and mobile units. Cavotec develops technologies for its own customers, and as a trusted partner of leading OEMs.

Its technologies minimise tarmac congestion, drive operational efficiency and reduce environmental impact. The company makes a vital contribution to enhancing passenger service and experience through improved cabin comfort and ensuring on-time departures.

Stand B5/1220

Cooling super-jumbos

Cavotec’s innovative technologies include its sub-freezing PC Air System that can cool all types of aircraft — including A380 super-jumbos — quickly and effectively under all ambient conditions.

It is the first system of its kind to comply with IATA’s AHM 997. It incorporates an automated control system that continuously measures temperature and static pressure at the aircraft inlet.

Sub-freezing air makes it possible to reach required cooling performance in ambient temperatures above +45°C, without requiring any changes to aircraft design. Cooling air to these temperatures improves passenger comfort and can reduce turnaround times at the gate without using the APU (Auxiliary Power Unit), thus reducing emissions.

The result is a ground cooling system that delivers more cooling power and operates more safely with aircraft ventilation systems than any other system on the market.

Stand B6/1220

In 2011, two business craft suffered brake failures when landing in opposite directions on Key West International Airport’s 4,801-foot runway. The first overran at the west end of the runway where there was no EMAS, severely damaging its fuselage, and injuring, in some cases seriously, its passengers. The second, though, overran at the east end where a Zodiac Arresting Systems EMAS had been installed – the craft was arrested, there was no damage to the aircraft and nobody was hurt.

Photo courtesy of Key West Int’l Airport
**AUTOBAGDROP: 15 MILLION BAGS PROCESSED**

ICM's AutoBagDrop enables passengers to check-in their baggage by themselves without having to queue at a check-in desk. It is proven for single and common-use airports in domestic and international environments.

User friendly system: the AutoBagDrop solution uses a simple, intuitive graphical user interface, and is easily configurable for specific airline requirements and branding. Baggage is automatically checked by determining the bag weight, dimensions, volume, shape, conveyability, and radio frequency identification (RFID) or barcode bag tag. A key design feature is the side-loading of bags, which is easier than front-loading and provides a clear safe area for passengers. In addition, the aesthetic design provides a non-intimidating user experience.

Safe and secure: using patented technology, anti-intrusion systems prevent any kind of trapping or injury to passengers, as well as maintaining the integrity of the weighing process. Non-conveyable and multiple bags are detected using advanced 3D analysis. Optional biometric systems can be readily integrated to meet airport and airline-specific security requirements.

Flexible integration: AutoBagDrop series one and three are designed to be retrofitted into existing check-in desks, whereas the series five and seven models are designed to replace existing check-in desks. All models can be seamlessly integrated into the terminal design, with interfaces into baggage handling, departure control, security and overhead display systems.

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©2013 San Diego County Regional Airport Authority
The airport served 17.2 million passengers in 2012, and the latest available figures for August 2013 show a +2% increase year-on-year. The Green Build comprises several projects that provide a more pleasant travel experience for passengers. The first thing passengers notice is the dual-level roadway, which, for the first time, separates the airport’s arriving and departing passengers. Departing passengers can use enhanced curbside check-in, which allows them to check-in, print their boarding passes and drop off their bags. Once inside, passengers go directly to the new security checkpoint – five times larger than the original checkpoint, with twice the number of security lanes and more room for queuing.

The bright, spacious terminal is filled with natural light, and the 10 new gates feature modern seating with access to power outlets, USB ports and cupholders. A new concessions core – Sunset Cove – is a welcoming, bright area that offers exciting new concessions, as well as the Delta and United club lounges. Finally, more than $6 million (€4.5m) in art is integrated through The Green Build, providing colour, dynamism and an atmosphere unique to San Diego.

“The Green Build is ‘green’ for two reasons; one is for its sustainable elements – we’re hoping to achieve Leadership in Energy and Environmental Design (LEED) Gold certification from the US Green Building Council – and the other is for the ‘greenbacks’ it brings to the local community,” explained Bowens.

The Airport Authority Board was firmly committed to keeping much of the project’s money in San Diego, and, as a result a full 89% of contracts went to local businesses. “That’s more than $415 million (€310m), $118 million (€88m) of which went to small businesses,” Bowens added. “A strong outreach campaign to small and local businesses, as well as an intentional effort to make packages smaller and therefore more attainable for small firms, helped us reach such incredible numbers. Additionally, The Green Build created more than 7,000 jobs over the course of the project, at a time when the region needed them the most.”

Impressively, the expansion was completed on schedule and $45 million under budget as a result of the economic environment, and prudent financial planning by the Airport Authority.

Sustainability and environmental sensitivity are hallmarks of The Green Build. The airport and its contractors made every effort to source construction materials regionally to minimise energy usage and the fuel required to deliver products. More than 54,000 tons of construction waste from the project was diverted from landfills, much of it recycled or reused on site. The project incorporates low-flow water fixtures, reflective roofs, the capability for photovoltaic (solar) panels, use of natural light and energy-efficient lighting, and native and drought-tolerant plants in the landscaping.

While San Diego International Airport may be finished with The Green Build, it certainly isn’t done maximising its 661 acres. It is working on the development of a consolidated rental car centre on the north side of the airfield. Landmark Aviation, the airport’s general aviation tenant, will break ground this autumn on a new GA terminal. And the airport is also in the midst of an Airport Development Plan, which looks at the future of Terminal 1 – already 50 years old – as well as the potential development of land on the southwest side of the airfield.

San Diego International Airport’s recently completed Green Build is the largest project in the airport’s history. The expansion of Terminal 2, as its name suggests, has a strong focus on sustainability and also on the local community, with the vast majority of contracts awarded to local businesses. Thella F. Bowens, President/CEO, San Diego County Regional Airport Authority, outlined the development to Ross Falconer.

Bowens: “I think I’m most proud of the contributions this project has made to the community. More than 7,000 people were able to work on The Green Build, and millions of dollars went to small and local businesses. For the most part, the money spent on the project stayed in the region, and will have lasting effects.”
Despite continuing economic turbulence weighing heavy on air passenger traffic from key markets in Europe and North America, Canada’s aviation industry continues to experience impressive growth. Throughput at Canadian airports increased by +4.8% in 2012, bringing the total number of passengers to just less than 119 million, and its airport landscape is brimming with development. Modernisation and expansions are taking place nationwide and innovative initiatives are infiltrating every passenger process. Canada’s airports play pivotal roles in their surrounding communities, serving as dominant drivers of economic development and pillars of regional responsibility; Winnipeg Airport Authority for instance invests substantially in community projects such as the Winnipeg Harvest food bank. “Airport city has taken on its own meaning nowadays,” said Barry Rempel, President and CEO of Winnipeg Airport Authority: “The architect behind our new airport building centred the design of the terminal on the openness of the people of Manitoba and the connection between our close-knit community and the land. It’s amazing how many of our passengers have recognised this.”

With consistently escalating passenger numbers and nationwide infrastructure expansion, Canada’s airport landscape is a fertile bed of growth. Amy Hanna spoke to four of its most forward-thinking airports to discover how they are developing to bolster their positions as world-class air transport hubs.

**Canadian airport round-up**

Ahead of the development of its CAD$1.5 billion (€1.1bn) modernised terminal, in 2011 Aéroports de Montréal undertook an in-depth examination of the airport’s future. Working alongside multiple consulting organisations including MIT, the study considered the impact of factors such as demographics, population growth, technology and aviation regulation on the airport until 2080 to ensure that further expansion would get maximum value from the airport in the long-term. **Photograph courtesy of Gerry Kopelow**

Barry Rempel, President and CEO of Winnipeg Airport Authority: “The architect behind our new airport building centred the design of the terminal on the openness of the people of Manitoba and the connection between our close-knit community and the land. It’s amazing how many of our passengers have recognised this.”
High-tech solutions. Low-stress travel.

Over the past 10 years, we’ve been busy making a name for ourselves as a world leader in innovative airport management and leading edge technologies, to ensure a secure experience and a fast turnaround time. Self-service check-in and baggage drop-off, mobile and internet check-in, baggage tracking systems: when it comes to flexible and seamless processing for both flights and passengers – you name it, we’ve got it. (And quite often, we had it first.) Thanks to our geographical location and low airport fees, it’s no wonder more than 30 carriers – including all major North American and European ones – have selected Montréal-Trudeau Airport, with flights to over 130 destinations.

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the building to enhance the facilities that will make the passenger’s flow through the airport more efficient and hassle free,” Eng explained. The new infrastructure is giving the airport room to grow, and in the first half of 2013, GTAA experienced a +9.8% increase in passenger traffic. “As a result of our strong financial position, we have been able to lower aeronautical fees for the sixth consecutive year. Last year, we announced a 10% decrease to our landing fees and we have committed to hold these rates for three years,” Eng added.

At Calgary International Airport, unwavering growth in passenger traffic of +3.5% has fueled the beginning of the most monumental expansion project in its history. A 1,600-strong construction crew is working around the clock to bring the CAD$2.1 billion (€1.8bn) Airport Development Program to fruition, providing much needed further capacity – vital to the airport partners’ growth and development – and solidifying YYC’s position as an important economic growth generator for the province.

“YYC has more than tripled in size and passenger volume over the last 20 years and in 2013 the airport expects to welcome over 14 million passengers,” said Garth Atkinson, President and CEO of Calgary Airport Authority. The colossal modernisation will see the opening of a new CAD$600 million (€438m) runway in mid-2014 which, at 14,000 feet will become the longest runway in Canada, capable of landing the largest aircraft in the world with fewer payload restrictions. The second aspect of the expansion, the International Facilities Project, incorporates the development of a 183,500sqm new terminal, which will double the amount of space at the airport. The new International Concourse will feature an CAD$80 million (€57m) state-of-the-art baggage handling system, 22 additional departure gates for flights to US and international destinations, and will revolve around sustainable design principles, using geothermal ground source energy to help heat and cool the building, as well as rainwater harvesting tanks. “A positive passenger experience, from curb to gate, is important to the entire YYC community. We will continue to work at ensuring that experience is a positive one for all the passengers that travel through Calgary International Airport,” Atkinson added.

Setting an industry standard
Canada’s visionary airport development has not gone unnoticed by the rest of the world. The opening of Winnipeg James Armstrong Richardson International’s striking new terminal in 2011 earned the airport a hoard of esteemed prizes, including a 1st place ranking in the Best Improvement: North America category in ACI’s 2012 Airport Service Quality (ASQ) Awards. “We have really put a focus on exceeding our customers’ expectations, and in doing that, in each of those moments of truth, every interaction with the customer, the efforts of our staff create an extraordinary passenger experience,” Rempel said. “I wouldn’t want to underestimate the impact of all elements of our airport’s infrastructure on our service though. Our brand new terminal is at the forefront of technology and design, with ease of travel and streamlined processes at the centre of everything we do.”

Winnipeg Airport was the first in Canada to adopt an entirely common use infrastructure, and its newly expanded, 55,000sqm terminal is pushing the envelope in terms of industry leading innovation and service for the airport’s five million passengers. Its redesigned security points have reduced Winnipeg’s queue times to the lowest in the country, and the airport was also among the first in Canada to streamline the baggage drop off process, enhancing customer service by allowing passengers to process luggage at a single location without having to locate different bag drops for domestic, transborder or international destinations. “Any passenger – assuming they haven’t already checked-in on their phone or tablet – can check-in at any kiosk, drop their bag anywhere on the belt and head on through security to airside. It’s done all seamlessly, and though complex behind the scenes, the process in completely transparent for the customer. The terminal is completely intuitive; with an open design, it’s very obvious to the customer where they need to be going next,” Rempel commented.

Intelligent design is also enhancing the passenger experience at Montréal-Trudeau Airport, where the Montréal Identity Program has infused facilities with typically Montréal character, while 100% common use facilities have expedited processes. The airport’s emphasis has turned to strengthening its position as an international hub, and, following exponential growth in international traffic, it is once again expanding to increase its capacity. “We have almost completely rebuilt the terminal, with investments exceeding CAD$1.5 billion (£1.1bn). Now, we are again adding capacity for international flights, expanding the check-in area, baggage rooms, and international jetty to meet future needs and maintain the desired level of service.” Cherry explained. “In the first of two phases, we added a double gate for public transport vehicles and we are expanding the apron and parking to provide much more capacity. In the second we will add eight new gates – including six contact gates for wide-body aircraft – bringing total international gates to 19, and will also develop a high-end commercial area. We expect to have more flights and new destinations, and generate more non-aeronautical revenues as a result.” The modern new features should all be operational by summer 2016 and, when completed, will have the capacity to handle up to 23 million passengers. The airport’s priority is now to further expand its route network, and it is hoping to soon begin regular flights to Beijing, Istanbul and Tunisia, as well as services to Brazil and Panama, further augmenting Canada’s connection to the world.

In recent months, Air Canada launched its leisure airline ‘rouge’ with services to Venice and Edinburgh from Toronto Pearson. Air Canada also added services to Istanbul, while Philippines Airlines commenced service to Manila, EgyptAir to Cairo and Aeroflot to Moscow.
Connecting Canada

Located at the heart of North America, the Winnipeg Richardson International Airport is Canada’s newest and greenest airport, serving 3.5 million passengers each year.

Because of its geographic location, this prime travel hub serves as the gateway to Central Canada with a catchment area of 6.5 million passengers.

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