Growth, growth, growth at
Istanbul Sabiha Gökçen

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For many airports across Europe, the summer has been pretty good – with demand for air transport significantly outperforming wider economic conditions and airlines (cautiously) adding more capacity. The peak 61 days of July and August saw passenger traffic grow by 5.6%, while freight increased by 3.1%.

Yet, many clouds are gathering on our horizon. In its latest economic forecast, the OECD is pointing to the eurozone being, once again, the most worrisome threat to global growth potentials. Low inflation rates are holding back economic activity and employment with deflation risks increasing. With GDP growth expected to only marginally improve in 2015, it is unclear whether air traffic will be able to keep defying economic gravity in the months ahead. What’s more, geopolitical risks have become quite prominent with conflicts both within Europe – Ukraine and in its immediate neighbourhood – the Near East.

When the ACI EUROPE Board met with the Administrator of the US Transportation Security Administration (TSA) in September, one of the messages that came across was indeed that the terrorist threat has significantly increased both in intensity and complexity. The meeting allowed us to better understand the threat environment, as well as the rationale behind the additional airport security checks that have been required over the past months. It also gave to the US TSA more insight as to the operational implications that these measures can have for European airports. Effective cooperation between the EU, its international partners and the airport industry has probably never been more important – for ACI EUROPE. It is a clear priority.

This autumn also sees us very much focused on the big institutional shake-up of a new European Commission (EC). It’s (almost) all new women and men in charge, tasked with charting a new course for Europe under the leadership of EC President Jean-Claude Juncker. Besides bold changes in the structure and functioning of the EC – which many agree are much needed to ensure more policy alignment and delivery – the number one priority will sound familiar to many of you: jobs, growth and investments.

For ACI EUROPE, air connectivity must be part of this renewed policy for jobs, growth and investment – for which Juncker announced new policy proposals within the next three months.

In this regard, the Airport Industry Connectivity Report, which we released last June at our 24th Annual Congress & General Assembly in Frankfurt, could not be more timely. It shows that Europe is falling behind, with direct connectivity at EU airports down by -7% since 2008. This report also shows that regional airports in particular have felt the impact, and that the relevance of the top European hubs in terms of intercontinental connectivity has considerably diminished – especially to the benefit of the mega-hubs located in the Gulf.

These findings are not only a cause for concern for European aviation, but also for the competitive position of the European economy. With the shift in the global economy, Europe is becoming ever dependent on external trade – with aviation as a key enabler. This calls for a new and wider strategic vision about our sector and its strategic relevance for economic growth and job creation. Many countries outside Europe have fully understood this relevance – it is high time that Europe also comes to terms with it.

You can read more about the new EC and our Airport Industry Connectivity Report in the following pages, as well as about the CEO of an airport that has actually increased its connectivity more than ten-fold over the past 10 years: Gökhan Bugday from Istanbul’s Sabiha Gökçen Airport. We also provide you with an insight on airports’ role in the face of the ongoing Ebola outbreak, the latest about the growth and success of Airport Carbon Accreditation, the latest innovations being embraced by European airports – and much more.

**Will the new European Commission connect the dots?**

*By Olivier Jankovec, Director General, ACI EUROPE*
**Airports in the news**

**Keflavik Airport**

Has achieved double-digit growth in every month so far in 2014.

Keflavik International Airport aims to boost non-aeronautical revenues through the Concessionaire Analyzer+ (CA+) solution. The CA+ project at Keflavik coincides with the airport’s increasing international passenger numbers and the many changes taking place in retail and F&B outlets.

Keflavik is starting a pilot project with three shops, rolling it out to all concessions early in 2015. By using CA+, the airport will be able to automatically collect transactional level sales data in real time using CA+ Capture, which is software installed on concessionaires’ points-of-sale. It automatically collects the sales with no intervention, or by allowing submission by concessionaires through the CA+ Interface using web services or the CA+ Portal.

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

**Southampton Airport**

**Averaged 4.6% growth from January to August.**

Southampton Airport has become the first airport in the United Kingdom to enhance the use of the Aerolaser technology for bird strike prevention. The Aerolaser represents an innovative step, increasing the efficiency of bird strike prevention tactics and makes airside operations even safer. The enhanced laser technology simulates a physical danger to the birds, causing the bird to fly away to protect itself. The new Aerolaser also includes the patented ‘Horizon Safety’ feature, which disables the laser past a certain height, eliminating the risk of the beam being shone directly at aircraft and air traffic control tower. The laser is also optimised for use in bright conditions, making it much more effective in daylight hours, and has a range of 2,500 metres.

**Madrid-Barajas Airport**

**Handled nearly 12m passengers between June and August.**

The largest Spanish airport Madrid-Barajas has finished the integration of the Airport-Collaborative Decision Making (A-CDM) programme, in order to optimise the management of its operations. Thus, it has become the 12th European airport to fully implement this new system. The A-CDM programme is a joint initiative sponsored by EUROCONTROL, ACI EUROPE, CANSO (Civil Air Navigation Services Organisation) and IATA to improve the efficiency of airport operations, reducing delays, increasing the predictability of operations and optimising the use of resources, both material (airspace capacity, runway capacity, parking, etc) and human (ground handling equipment, airport operators, airlines). In Spain, Aena is also working on implementing A-CDM at the airports of Barcelona-El Prat and Palma de Mallorca.

**Ljubljana Airport**

**1.7% growth between January and July.**

Fraport has won its bid to acquire Slovenia’s main airport, Aerodrom Ljubljana, in a push to extend its international reach. Fraport, which operates Europe’s third-largest airport at Frankfurt, said under the agreement with a consortium headed by the Slovenian Sovereign Holding agency it is to pay €177.1 million ($229.4 million) for a 75.5% stake and will subsequently make an offer for the remaining shares. It is paying 61.75 euros per share for the initial stake, valuing the whole company at €234 million.

**Malta International Airport**

**Handled nearly 1.5m passengers from June to August.**

Malta International Airport has introduced self-service kiosks at its check-in hall in a move to improve the passenger experience. The automated, interactive and touch-screen based check-in kiosks will decrease full-service check-in queues, as well as lobby congestion. Self check-in enables passengers to choose their seat, print their boarding card and drop off luggage to the bag-drop facility, and airport and airline staff will be available to offer assistance if required.
**Ankara Esenboğa Airport**

Monthly traffic varying between a low of 873,000 in July and a high of 995,000 in August. Ankara Esenboğa Airport has become the first carbon neutral airport in Turkey after reaching the top level of Airport Carbon Accreditation. Operated by TAV Airports, the gateway has reduced its carbon emissions, engaging its partners to do the same, and offset its remaining emissions by investing in clean energy.

**Warsaw Airport**

Handled nearly 6m passengers from January to July. A new cargo apron has been completed at Warsaw’s Chopin Airport. The new ramp is located alongside the existing cargo apron in the southern area of the airport. It can accommodate three code F aircraft such as the Antonov An-124 Ruslan or six code C types such as the Boeing 737 or Airbus A320.

**Riga International Airport**

August passenger figures up 2.9% year-on-year. The airport is expanding the area for handling non-Schengen passengers and adding four boarding gates in a bid to raise its capacity. Improve efficiency and boost customer service levels. According to the gateway, the extra capacity is desperately needed as 4.7 million passengers passed through its facilities in 2013 despite them only being designed to accommodate 3.3m ppa. Arhis Arhitekti Ltd is spearheading the project with construction work being carried out by Skonto Būve Ltd under the supervision of Būvalts PMG. The project is being 100% financed by the airport through its operating profits and credit funds raised by the Pohjola Bank.

**Lithuanian airports**

Lithuania’s three main airports grew by a combined 11% between January and July from 1.94m passengers to 2.15m.

Lithuania’s three airports have merged into one as part of long-term plans to streamline air travel in the country. State Enterprise (SE) Kaunas Airport and SE Palanga International Airport will be merged into SE Vilnius International Airport, with the latter entity taking over rights, obligations and contracts of the two remaining airports. SE Vilnius International Airport will change its name to SE Lithuanian Airports (Lietuvos Oro Uostai) as part of the new plans. SE Lithuanian Airports will be structured as a company with three branches – Vilnius Airport, Kaunas Airport and Palanga Airport. All three airports shall continue operations under the Lithuanian airport network. SE Kaunas Airport and SE Palanga International Airport will cease to exist as separate legal entities after the merger.

**Copenhagen Airport**

Averaged 7% growth Jan-Aug 2014. Copenhagen Airport has become the first airport in the world to trial Google Glass. The airport equipped its passenger service staff with the wearable technology, providing them with details about passengers and airport operations. From the hands-free aspect to fast, easy access to passenger and airline information with the tap of the frame or wink of an eye, the experiment was considered a success by airport staff, who noted that having access to services like Google Translate and gate, baggage or flight information helped them improve dialogue with passengers.
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Nobody could spell or pronounce the name of this airport when it opened in 2001,” says Gökhan Buğday, the CEO of Sabiha Gökçen International Airport (SGIA). Buğday was talking to Airport Business just shortly after achieving yet another record day in which SGIA handled over 90,000 passengers. This year SGIA will come tantalisingly close to 24 million passengers, up from 18.6 million last year, and a 100-fold increase on 10 years ago when the entire throughput for the whole of 2004 was just 245,000 – a time when the airport frequently had to defend itself from charges of being an irrelevant white elephant.

What has taken SGIA from a small regional airport-type performance is not the sudden and extraordinary growth that comes to some airports over one or two years as a result of securing a new airline base, but ‘extraordinarily consistent’ growth of 20-25% every year in the past decade.

“Our aim is to pass 25 million and enter the super-league,” says Buğday. “We will next year, and we’ll maintain double-digit growth for another 4-5 years.” After this, Buğday thinks growth will moderate. “At this scale and size, 20% growth means finding another five million more passengers every year, and we probably should not expect to be delivering so many millions!” But while Buğday believes “growth is not likely to be permanent,” and that expansion in 5-6 years will “settle down to around 10%, becoming stable, at least not going down…” he also appears to wrestle with an unusual struggle: The possibility that SGIA may underestimate the size of future passenger traffic. “I suppose it’s possible that growth will be higher than even we forecast; indeed, I don’t discount the possibility that there may be more than 200 million passengers in the Istanbul airport system in much less than 20 years.”

From zero to hero: Why it’s been growth, growth, growth at Istanbul Sabiha Gökçen

An interview with Gökhan Buğday, CEO Sabiha Gökçen International Airport. By Paul Hogan.

Buğday on SGIA’s competition with the new $10bn Istanbul Grand Airport: “The advent of IGA is more helping us to achieve our 50 million passenger forecast, than eroding our chances.”
than 200 million passengers in the Istanbul airport system in much less than 20 years.” These meanderings are the stuff of dreams for much of the rest of the world.

“Of course it has helped a lot that Turkey did have a good recession,” reflects Bugday, without intended irony, while commenting on the big external factors for the airport’s exponential growth, including the fact that, while the rest of Europe struggled, Turkish GNP expanded by a whopping average 5.5% in the five years 2010-14, making it the fastest growing economy in Europe, and one of the fastest expanding developed economies in the world.

For Bugday the positives just keep stacking up: Istanbul, at 14.2 million, is Europe’s biggest mega city (including five million on the Asian side immediately around Sabiha Gökçen). “The per capita GNP in Istanbul is $30,000 and this affluent middle class extends SGIA’s two-hour catchment to 20 million.” (By comparison per capita GNP is $34,000 in Italy, $43,000 in France, and $10,500 nationally in Turkey.)

While the Turkish economy is booming, tourism is booming, and SGIA’s own customers are booming, a large portion of SGIA’s success has also been closely intertwined with that of Pegasus Airlines, which transitioned from a modest charter carrier to fully-fledged low cost airline in 2005. Demand for a low cost alternative to Turkish Airlines was massive, and both the airline and airport have enjoyed the magical, near-25% annual growth ever since.

**Turkish Airlines comes to Sabiha Gökçen**

Pegasus carried 16.8 million passengers last year – yet another 24% improvement – and, although not all of these passengers travelled to/from SGIA, the airline still dominated SGIA’s 18.6 million throughput. However, this dynamic has been changing for some time. Turkish Airlines’ own massive success, which has seen it become a Middle East-style hub airline (leaping five-fold from 10 million passengers in 2003 to 50 million last year), has long been hard to accommodate at Istanbul’s main Atatürk hub airport. This has been an indirect actor on the success of SGIA, helping to intensify passenger and other-airline interest in Turkey and Istanbul which could not be absorbed at Atatürk. Bugday readily accepts this fact: “SGIA continues to increase its share because of constraints at Atatürk, which has become a victim of its own success to a considerable degree.”

But last year, no longer able to resist getting involved in SGIA’s dynamic growth, Turkish Airlines gave in to temptation and decided to start a second hub at SGIA. “Although the Turkish Airlines low cost subsidiary AnadoluJet has domestic flights, the direct move to SGIA by Turkish Airlines in May 2013 was on a completely different scale. By starting with 13 international destinations, they signalled they are creating a substantial network here.”

However, Bugday is also quick to not want to give all the credit to the airlines. “It was SGIA which created a solution for the under-exploited catchment area on Istanbul’s Asian side and which took all the risk in building, extending and, when the need arose, modernising Sabiha Gökçen. During all this period of super-growth, we have invested hugely in marketing this airport to both the airlines and the consumers. We have not merely responded to market demand, we have in fact been market-makers, directly generating dynamic growth – a whole city has grown up around the airport because of the airport – land prices here were $200 per metre when the airport was first constructed, now they are closer to $2,000 – $20 million per hectare.”
Throwing off the low-cost image

While it is a matter of fact that SGIA is now Istanbul’s powerful second airport, because its pre-eminence came in parallel with the emergence of Pegasus as a major European low cost carrier, both consumers and airlines often think of SGIA as Istanbul’s ‘low cost airport’. This perception has been reinforced by the fact that all the other low cost carriers heading for Istanbul have also turned up at SGIA – Air Arabia, easyJet, flydubai, Germanwings, Jazeera Airways, nasair, Transavia.com and Turkish Airlines’ low cost unit, AnadoluJet. This is not the same for other airports with similar dynamics – for instance London Gatwick is dominated by easyJet, but has successfully imparted a business message because, in contrast to SGIA, it has a whole history predating the advent of low cost carriers.

“We are not a low cost airport, but a full service airport embracing a full range of airlines and passenger profiles – certainly the low cost airlines – and for that matter Pegasus, Turkish Airlines and Qatar Airways, do not disagree,” says Buğday. “Our airport charges are similar, though possibly a little cheaper than at Atatürk.”

Although many of the new airlines coming to Istanbul have tended to be low cost, they have come to SGIA because it’s a good proposition, and because SGIA gives them a chance of access, while slot and congestion problems at Atatürk would make market entry very difficult. Indeed, airBaltic even switched to SGIA from Atatürk for these very reasons as the on-time performance of our flight schedules exceeds 95%.

But the most symbolic and seismic change from the low cost image has been the opening of Turkish Airlines’ significant base at SGIA in May last year. The champion Star Alliance carrier epitomises everything that it means to be a full service, hub-and-spoke airline. “Turkish Airlines’ decision to come here truly buries the low cost label. It has also boosted our traffic yet again, rather than taking market share away from Pegasus, which has continued to grow at over 24% in the year since Turkish arrived.”

This effect has been compounded by the arrival in May 2014 of Qatar Airways services – the first of the MEB3 (the ‘Middle East Big 3’ – Emirates, Etihad and Qatar Airways). “Qatar Airways, from the oneworld Alliance, is anything but a low cost carrier. Its decision to launch services to SGIA is based on the level of services we can offer, and the opportunities afforded by our profile and catchment. It is especially significant that it already serves Atatürk.”

The SGIA long haul hit list

Qatar’s arrival, and the other airline developments, leads Buğday to stress a long-expressed desire: “We want more long haul.” But Buğday does not deny that Emirates and Etihad are “obviously” key targets. But he says SGIA has a lengthy list of other suitors and is in negotiations with “a lot of people”. He declines to tell us exactly who is targeted, but he does say destinations include Beijing and Shanghai. “I don’t think it’s a secret that New York is also on our list – after all United should have come to here, not Atatürk,” says Buğday, referring to United’s short-lived New York-Istanbul route, for which United apparently did not benefit from expected Star Alliance feed from Turkish Airlines. For now it seems too premature for such a route get the same feed it needs from Turkish Airlines’ new presence at SGIA, which does not yet mesh with long haul connections. But Buğday does say that talks continue with Delta and others for long haul North Atlantic services. For the time being these talks are “not too serious” – apparently the same lack of obvious connection persists. However, he maintains: “A lot of things are changing on the American side and especially Turkish Airlines’ fast-moving strategy at SGIA.”

Ultimately Buğday forecasts: “New York, Chicago and Miami will all be linked within 10 years. It will take a little time but, besides talking to overseas airlines, I am hopeful that either one of our two big home-based carriers could start long haul.”

In the meantime, most of the focus remains exactly where all the growth has been derived from in the past 10 years: “We are 3-4 hours from 100 countries; these destinations are our particular concentration, especially the Middle East, but we must not forget the extensive range of cities which can be viably accessed by mid-sized aircraft such as the 787.”
SGIA’s competition with the $10bn Istanbul Grand Airport

Turkish Airlines’ explosive growth and charge towards 100 million passengers has driven the burgeoning traffic base at Atatürk, and created the requirement for the new ‘Third Airport’ – the so-called ‘Istanbul Grand Airport’.

But while it has benefited from congestion at Atatürk, SGIA has far more to gain from Istanbul’s emergence as one of the world’s pivotal transport hubs, offering unique advantages halfway between its competitors in Northern Europe and the Middle East, than it does from the constraints on the main hub. Therefore, Buğday is a supporter of IGA and undaunted by the prospect of competing alongside the $10 billion, six-runway, 150 million passenger, giant airport. (Now under construction to the east of Istanbul, the first phase is set to open in 2018.)

“There is a lot of focus on Turkey, so we really need that airport. Growth of 15% is a really big number. We already have 70 million in the Istanbul airports system – that will easily be 80 million this year, and in the next 4-5 years be 100 million; capacity is needed as soon as possible. By the time IGA opens in 3-4 years, SGIA will have at least 35 million passengers and more than 150 destinations – these are all good numbers for us!”

When SGIA reaches these levels a new expansion plan will give the airport the capacity to advance to 70 million passengers. “IGA will no doubt be the newest in the world, and huge – but the qualitative experience will not be less at SGIA, just different. There are reasons why people will choose the hub at IGA, but there are also lots of reasons why they will prefer SGIA: The Asian side catchment, the fact that we will be much closer to downtown, and most likely connected by metro by then. The advent of IGA is more helping us to achieve our 50 million passenger forecast, than eroding our chances.”

New second runway to ‘secure’ SGIA prospects

As IGA takes shape on the Black Sea coast east of Istanbul, Buğday agrees that SGIA’s prospects have been “secured” by the construction of an $850 million second runway suitable for handling A380 operations. Building work gets underway end-October, with completion scheduled for just 30 months later in 2017.

The new capacity comes just in time: The single runway airport will be slot coordinated for the first time this winter, something SGIA would have rather avoided. “We and the airlines would still prefer not to be coordinated after 2015,” says Buğday, regretting some of the loss in scheduling flexibilities this will mean. “But who knows? Maybe it will be a good experience – especially if it means reduced terminal congestion as a result of spreading some of the peak traffic.”

In what amounts to a planning framework that most airports in Europe will look on with some envy, the area for the second runway had been carefully set aside. However, it is not without complexities – a major gas pipeline must be diverted and a 1km road tunnel constructed.

Regional threats and opportunities

But Buğday is not without his worries, particularly the situation in neighbouring Iraq and Syria. “We have shown a good resilience to external shocks ever since the birth of this airport, which coincided with 9/11 – and we continue to do very well, but peace in the Middle East would be so much better for us, as well as everyone else.”

Another promising market for SGIA which is currently troubled is Russia. New Pegasus Airlines services to Moscow, Omsk, Krasnodar and Sochi last year continue to be in significant demand, despite Russians being told by their own government that they will be vilified in the streets of Western Europe – a factor which combines with the worsening of the Russian economy. However, Buğday says none of these things have noticeably impacted Russian travel to Turkey and SGIA. Indeed, in a separate interview, the Pegasus Airlines CEO Sertac Haybat told this magazine in May that he would serve “10-20 destinations" in Russia if he could, claiming the main barrier was bilateral, rather than the market demand. Buğday is more optimistic of the regulatory situation: “Conditions have in fact improved with the opening up of service possibilities to six more Russian cities, and a new frequency permitted on Moscow, which is the most restricted route.” However, there’s little doubt that Russian opportunities from SGIA fall far short of demand, which would be best served by open skies, which is “not or less" the relationship with the EU.

Indeed, other sectors of the Turkish economy can only look on enviously at how its airports and airlines can enjoy some of the most important aspects of the EU’s Single Market, without actually being members, as Turkey’s historically-long full application to join the EU, first made in 1987, has seemingly completely stalled in recent times. But the contrast between Turkey’s soaring economy and the woes of the eurozone show that this is a country that has a momentum all of its own. By any measure – whether GNP or traffic figures at SGIA – so far this has most definitely been Turkey’s Century. Gökhan Buğday says the biggest driver of this isn’t a resource like oil, but the industriousness of its 75 million people: “Turkey has an ingrained service ethic which starts early, at home and in schools. You can find it everywhere, in family cafes as well as the big companies like SGIA. All these businesses are part of the successful Turkish proposition. Everyone in this country works hard and thinks the customer is king. That is why we’re succeeding.”
TAV moves to buy 40% of Sabiha Gökçen International Airport

**TAV Airports’ CEO Dr Sani Şener explains the planned proposition to Airport Business**

Sabiha Gökçen International Airport (SGIA) is 60% owned by Malaysia Airports Holdings and 40% by Limak Holding – the Turkish construction company that is also the lead partner in the consortium building, and set to operate, the new Istanbul Grand Airport. Limak is therefore the chief rival of TAV Airports, the operator of Atatürk which (according to comments made by TAV Airports’ CEO Dr Sani Şener to Airport Business) “walked away” from the IGA deal when bids for the 25-year airport concession eventually rose beyond €26 billion.

However, in early September this ownership landscape was rocked when Limak agreed to sell its holding in SGIA to TAV Airports. The SGIA deal is subject to Malaysia Airports’ first right of refusal to buy the Limak shares, as well as approval by the Turkish competition authorities, although it is very hard to conceive how there would be less competition as a result of this change.

Dr Sani Şener subsequently told Airport Business he was confident the Malaysians would agree: “They need a local partner and it’s our belief that they want us.”

‘Our business is very resilient!’

Assuming the deal does indeed go through it is a vital turnaround for TAV which faced the prospect of exclusion from the Istanbul market where Dr Şener says “there is really huge growth – traffic may plunge after external shocks – since 2000 we’ve had 9/11, war in Iraq, the Arab Spring, and now we have the Syrian war and IS – but in all this time Turkey’s airports have grown from 33 million in 2000 to 150 million today – an 11.2% compound growth rate – our business is very resilient!”

Dr Şener says he hopes that TAV’s experience in operating the highly congested Atatürk will be one of the key benefits it will be able to bring to SGIA (where under the terms of the shareholding agreement the 40% shareholding will apparently give it “equal control rights”).

“We believe we can create big improvements in airside capacity, which will combine very well with the advent of the second runway opening in 2017 including introducing principles such as Collaborative Decision Making. With SGIA’s proximity to the city, especially with the metro extension which goes out to tender soon, our vision for SGIA is that we have many big advantages,” says Dr Şener.

The planned deal ends speculation that Atatürk will remain open after IGA begins operation in 2017 – the TAV concession to operate the airport does not expire until 2021, meaning TAV Airports will have to be compensated for early termination. Despite some airlines (including Pegasus) saying that they would prefer Istanbul to be served by more than two airports – London is served by up to six – market pressures on the redevelopment of Atatürk for non-aviation uses are immense, with land values reported to be up to $3,000 per square metre, valuing the undeveloped site at some $30 billion.
Groundbreaking new analysis on air connectivity reveals EU falling behind

Connectivity is a word that regularly peppers business conversations in the airport industry, in the context of airport route development conversations and conferences, foreign direct investment in a region and of course social and economic impact. The reason for this is simple, airports live or die by that metric – the level of their connectivity, the diversity and frequency of the flights they offer.

Different metrics have been in use for some time – the most prominent being the number of direct routes an airport offers. However, that metric is unsatisfactory for two reasons – 1. it ignores the importance of frequency of service, but also 2. it ignores the significance of indirect connectivity, offered via services that link to hub airports.

In 2013, ACI EUROPE announced a collaboration with the company SEO Aviation Economics – a specialist consultancy in the Netherlands that had developed a unique methodology (called NetScan) for measuring connectivity, including frequency and indirect connectivity. The collaboration would include a full review of connectivity in Europe over the past decade, and also offer a special customised service, for airports seeking to measure their own connectivity more thoroughly.

On the occasion of the 24th ACI EUROPE Annual Assembly, Congress and Exhibition taking place in Frankfurt, Arnaud Feist, President of ACI EUROPE and CEO of Brussels Airport, announced the release of ACI EUROPE’s Airport Industry Connectivity Report, and outlined the main findings of the first-of-its-kind report. By measuring and analysing airport connectivity through various levels of aggregation and individual airport connectivity figures for the 461 airport-strong membership of ACI EUROPE, the release of the report provides the first ever in-depth review of the way connectivity has performed in Europe over the past 10 years.

Feist commented: “Trade, tourism, foreign investment, increased productivity and competitiveness all tally closely to the connectedness of people and businesses. Given that aviation is a prime and unsurpassed enabler of global connectivity, airport connectivity has profound implications on the way in which economic growth is generated. As such, airport connectivity doesn’t just matter at European level, because it trickles down to national, regional and local levels – shaping the fortunes of our communities as well as the mandate of every airport.”

The report reveals the serious and lasting impact of the 2008/2009 crisis on connectivity – in particular for the EU. Since 2008, the connectivity of EU airports has barely increased, with direct connectivity actually falling by -7% – in sharp contrast to non-EU airports in Europe, in particular in Turkey, which saw direct connectivity increase by +34%.

The report also shows that while EU hubs have been more resilient than small and regional airports in term of direct connectivity, they are now facing significant competition from hubs located in Turkey, the Gulf and to a lesser extent, Russia.

Since 2004, EU hubs have lost 10% of their market share on indirect connections out of Europe. They have fallen behind the Gulf hubs in terms of intercontinental connectivity – ie. connections offered by hub airports between World Regions other than their own. Back in 2004, the level of intercontinental connectivity offered by the top 3 Gulf hubs (Dubai, Abu Dhabi and Doha) was well below that of the top 3 EU hubs (London Heathrow, Frankfurt and Paris-Charles de Gaulle) and could be regarded as marginal.

Significantly, the intercontinental connectivity of Dubai Airport alone is equivalent to the combined intercontinental connectivity of London Heathrow, Frankfurt and Paris-Charles de Gaulle.

Over the past two decades, connectivity has become the word most synonymous with economic growth. Alongside the virtual connectivity afforded by the internet and the digital revolution, aviation is the unsurpassed enabler that connects people, places and products in the real world. All of which means that trade, tourism, foreign investment and increased connectivity are all closely related to the level of air connectivity. Elliott Bailey reports.
Today, these same top 3 Gulf hubs have established a leading market position, providing twice the level of intercontinental connectivity offered by the top 3 EU hubs. Significantly, the intercontinental connectivity of Dubai Airport alone is equivalent to the combined intercontinental connectivity of London Heathrow, Frankfurt and Paris-Charles de Gaulle.

Feist said “The EU’s decreasing connectivity speaks of slower and less inclusive growth. Our report shows that connectivity cannot be taken for granted, as traffic growth does not necessarily translate into connectivity gains. It also points to Europe being bypassed as an aviation hub and no longer being the significant player in providing global connectivity. These findings are alarming and they should serve as a wake-up call to our governments and the EU institutions.”

ACI EUROPE is pleading for a policy response, through the EU developing its own agenda for aviation connectivity. However, Feist was keen to clarify that he was not talking about a defensive agenda, whereby Europe would limit traffic rights for some airlines – or even use trade instruments for rather distant and hypothetical gains. “I am talking about an affirmative agenda, where the EU and governments would connect the dots and align all aviation related issues around the same objective – using aviation to underpin growth.”

**Airport capacity in the equation**

This policy agenda for connectivity primarily requires addressing the looming airport capacity crunch. Given the essential role played by hub airports in global connectivity, the prospect of seeing more than 20 major European airports becoming fully congested by 2035 should be addressed as a priority – as part of EU and national aviation long-term strategic planning.

It also requires doing away with existing bilateral air services agreements which are acting as an artificial constraint on connectivity. Opening up market access through EU negotiated agreements with our main trading partners (BRICS, ASEAN and MINT) should be a priority.

With a freshly elected European Parliament and a new European Commission taking office in the autumn, Feist considered that the time is right for a new policy direction and then concluded: “Our agenda for connectivity is a compelling case for more Europe. But it is also a case for Europe to work differently. The search for prosperity means that the EU institutions need to work better with business. ACI EUROPE is looking forward to playing its part in addressing this challenge.”

The ACI EUROPE Airport Industry Connectivity Report 2004-2014 is available to download from the Policy Library on the ACI EUROPE website: www.aci-europe.org

To enquire about the Customised Connectivity Report service, visit www.airport-connectivity.com
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With the COP20 conference soon to take place in Lima, political focus is returning to the issue of Climate Change. The economic and financial crisis, the Occupy movement that followed, and other issues, had taken the light away from the issue over the past five years, but it’s firmly centre stage again. Report by Inês Rebelo. Additional reporting by Elliott Bailey.

The return of Climate Change

On 23 September the UNFCCC held a special UN Climate Summit in New York, featuring a host of famous faces and political heavyweights. The weekend that preceded it saw nearly 400,000 people take to the streets of New York, to raise awareness about the need for action on Climate Change. Renowned author and social activist Naomi Klein has just released a new book about the impact of Climate Change and a plethora of documentaries are due for release in the next 18 months. And here in Europe, the EU is about to welcome a brand new EU Commissioner for Climate Action for the next five years. Make no mistake. Climate Change is back on the political agenda.

Aviation, with its aspirational sheen and its unparalleled visibility, is all too often a target of heavy criticism from environmental groups and regulators, but this disregards so much of the work that is going on behind the scenes. While manufacturers have been busy developing more fuel-efficient aircraft and airlines have been testing biofuels and negotiating a global emissions trading scheme, what’s been going on at airports?

Airports, as the ambassadors of aviation on the ground, have been hard at work, mapping and reducing their carbon emissions, engaging onsite partners to do the same and in some cases, even going all the way to carbon neutrality.

A programme of great success

This all goes back to a promise made in 2008, when European airports committed to reduce their carbon emissions, with the ultimate goal of becoming carbon neutral. One year on, at the ACI EUROPE Annual Congress in June 2009, Airport Carbon Accreditation, the institutionally endorsed environmental programme, was launched by ACI EUROPE. It has proved to be the lightning rod for so much of the work that airports are doing to address the issue of Climate Change.

The success is reflected in extraordinary figures. In June of this year, the programme celebrated five years, at the 24th ACI EUROPE Annual Congress in Frankfurt, with a total of 102 airports in Europe, Africa and Asia-Pacific certified at that moment. On this occasion, it was also announced that this past year alone European airports in the programme achieved a net reduction of 353,842 tonnes of CO2, enough to power 147,781 households for a year. In other words, there was an average 5.98% reduction across all the European airports certified by the programme.

Three months later (that is, currently), 108 airports are certified in five continents, welcoming 24.2% of global passenger traffic annually. 17 of those airports are carbon neutral, including Stockholm-Arlanda, Oslo, Ankara and Amsterdam Airport Schiphol. This is clear evidence that the programme is managing to achieve its main goal: helping the airport industry reduce its carbon emissions with the ultimate goal of becoming carbon neutral.

108 certified airports is a remarkable achievement, not only because the figure itself (and its relevance in terms of global passenger traffic, as indicated above) is impressive, but also because it reflects the extension of the programme to airports in a new region within the programme: North America.

Lift-off in North America

In September, at the 2014 Annual Conference & Exhibition of ACI-North America, Airport Carbon Accreditation launched in North America, marking a decisive step in consolidating the programme as the global standard for carbon management at airports. Kevin M. Burke, President & CEO of ACI-North America, stated that this extension showed that “our airport industry has become more demanding of itself. The success of the programme in other parts of the world is both an inspiration and a challenge.”
Simultaneously, the announcement that Seattle-Tacoma International Airport was the first North American airport achieving Level 2 Reduction has opened a foreseeably successful chapter in the North American airport industry history with respect to its environmental strategy. It is already inspiring other North American airports (Aéroports de Montréal, Denver International Airport, San Francisco International Airport and Portland International Airport) to follow its example.

Back to the origins
It all started in 2009. Following an industry commitment to address its CO² emissions, ACI EUROPE decided to launch Airport Carbon Accreditation at its 19th Annual Congress, where over 30 airports committed to becoming accredited within the first year.

In September 2009, Frankfurt Airport became the very first accredited airport achieving Level 2 Reduction, and in November 2009 Stockholm-Arlanda Airport became the first airport to achieve the highest level of accreditation: Level 3+ Neutrality.

Subsequently, more and more airports joined the programme and new milestones were gradually reached: in November 2011, Airport Carbon Accreditation took flight in Asia-Pacific (in association with ACI Asia-Pacific), where a total of 20 airports are now certified; in June 2013, it was extended to Africa, in partnership with ACI Africa, where Enfidha-Hammamet International Airport, the first African airport certified by the programme, has upgraded to Level 2 Reduction.

More recently, in November 2013, Airport Carbon Accreditation was named one of the top three low carbon projects for Europe in the European Commission’s World You Like Contest, and earlier this year was highly commended at the International Transport Forum’s Transport Achievement Awards.

How Airport Carbon Accreditation works
Airport Carbon Accreditation is a voluntary programme that works on an annual basis. Airports applying to become Airport Carbon Accredited at one of the four available levels of certification (Mapping, Reduction, Optimisation and Neutrality) must have their application verified by an independent third party and then fully reviewed by the programme administrator.

Airport Carbon Accreditation is administered by WSP Group, an international consultancy appointed to enforce the programme’s strict certification criteria. The programme is also overseen by an independent Advisory Board including representatives from ICAO (International Civil Aviation Organisation), UNEP (United Nations Environmental Programme), the European Commission, ECAC (European Civil Aviation Conference), EUROCONTROL and Manchester Metropolitan University.

Airports are managing to continuously address their carbon footprint in a variety of ways. These include: investments in heating and lighting efficiency technology, electric, hybrid or gas-powered vehicles and public transport incentive schemes. Airports implementing programmes such as Airport Collaborative Decision Making (A-CDM) and Continuous Descent Operations (CDO) also help engage others to lower their emissions on the airport site.

In June 2014, Airport Carbon Accreditation celebrated five years, at the 24th ACI EUROPE Annual Congress in Frankfurt, with a total of 102 airports in Europe, Africa and Asia-Pacific certified at that moment.

How to become Airport Carbon Accredited
Airports interested in Airport Carbon Accreditation can start the process by using the online application tool, available on the website: www.airportcarbonaccredited.org

Back to the bigger picture
Airports’ work on Climate Change is ongoing and there will be more to report on Airport Carbon Accreditation in the coming months, but also we’ll have new information on measures being undertaken to prepare airports for the impact that Climate Change will have on their own operations. Watch this space.
An unwelcome passenger: Air travel and outbreaks

The Ebola epidemic tearing savagely through parts of West Africa is the most severe public health emergency seen in modern times. As of the end of September, the number of recorded people infected by the virus has surpassed 6,500 with more than 3,000 deaths, in figures that are expected to vastly underestimate the true impact of the disease. With the World Health Organization warning that the spread of the virus shows no sign of relenting, we look at the role of the air transport system. Report by Amy Hanna.

In what has been declared by the World Health Organization (WHO) as an “international health emergency”, the Ebola epidemic has taken an unprecedented hold of the most acutely hit countries of Guinea, Liberia and Sierra Leone – having a far greater impact than all previous Ebola outbreaks combined – and the number of cases is growing “exponentially”. Never before in recorded history, the WHO has said, “has a biosafety level four pathogen infected so many people so quickly, over such a broad geographical area, for so long”.

The Ebola outbreak of 2014 is unlike any past case of the virus. It is the first time that the disease has entered into densely populated urban territories, having previously been confined to rural sub-Saharan regions of Africa. The arrival of infected patient Patrick Sawyer in Lagos, Nigeria’s most populous city, marked the first time that the contagion had been transmitted by a passenger of commercial air travel. At the time of writing it is two weeks since the first person in the United States was diagnosed with Ebola, after travelling from Liberia to Dallas-Fort Worth in Texas, arriving on 20 September. Thomas Eric Duncan, the patient presently being treated for the virus in Dallas, is said to have flown on United Airlines from Brussels to Washington DC’s Dulles International Airport, before making the final leg of his journey to Dallas-Fort Worth. Since Duncan was displaying no symptoms while flying, authorities have stressed that there is no risk of his fellow passengers having become infected, and it has repeatedly been emphasised that the likelihood of the virus spreading in any significant way via commercial flight is extremely slim.

Nonetheless, the cases – however rare – in which Ebola has been internationally conveyed by commercial flight have given way to the low murmurings of global alarm, and have raised the questions of where else Ebola could go – and what role air travel will play in it going there.

Redrawing the maps of our world

The key to understanding the labyrinthine development of global outbreaks is to consider their movement in the context of the way in which we travel today. Professor Dirk Brockmann of the Robert Koch-Institute in Berlin is world-renowned for his research into the geometry of complex, network-driven contagion phenomena, and analyses the way in which outbreaks spread through the study of human mobility.
Though the patterns of modern disease spread may seem more geographically erratic than they would have done several centuries ago they are not actually more complicated, but are. Brockmann explained, a product of the growing complexity of worldwide mobility. In the 14th century, the Black Death swept across Europe in definitive waves which, although driven by human interaction and mobility, possessed a rather simple structure because people only moved short distances. “We wanted to see if we could understand the complexity and if it really was more complicated and therefore unpredictable, or whether it’s a simple pattern, just like 400 years ago and it’s just the case that we don’t look at it the right way.”

By making sense of the underlying system which can potentially support the spread – the global air transportation network – Brockmann and his team deduced that global contagion phenomena can be better understood by redrawing the maps of our world. “Places such as London, or Paris, or New York were hubs centuries ago, but trade was local, and mobility was local. Nowadays, these hubs – important places in the world – are very interconnected. If you look at the world from the perspective of London, say, you have very strong connections to other metropolitan areas in the US or Asia or Africa that lots of people travel between, and that generates the complexity that we see in the spread of infectious diseases,” Brockmann stated. “For the modern world, where everything is connected over very long-range distances, we need to replace the conventional view and conventional use of geographic distance, to instead make predictions by a measure that reflects connectivity today.”

Brockmann’s pioneering map for the mobility of today takes an intuitive stance, replacing physical distance with a more effective kind of measure that resembles traffic and frequency. The more traffic there is, the shorter the distance between two places. “Imagine that you’re in London,” he said. “Lots of people move from London to other busy places like New York or Los Angeles, while far fewer people travel from London to say, a remote village in Scotland. Now the village in Scotland is geographically very close, while the big hubs like Los Angeles and New York are far away, but connected to London in a much stronger way. So intuitively it would maybe make sense to redraw the map in such a way that places like New York and Los Angeles are closer to London than the remote village in Scotland.” A similar map of connections could be plotted for each of the airports in the world’s air transportation infrastructure, creating a network of thousands of airports and many more thousands of connections that document the way we traverse distances today.

This research is the foundation of a mathematical theory that provides powerful insight into outbreak’s future reach, and brings a level of predictability to diseases’ seemingly chaotic spread that has enabled Brockmann to develop an interactive network analysis of the relative import risk and most probable spreading routes of Ebola. Using computational, quantitative epidemiology, Brockmann has interpreted and estimated the risk of the virus spreading from major airports in the affected countries of Guinea, Sierra Leone, Liberia, Senegal and Nigeria to other regions of the world as induced by global mobility. Using the probability that a patient boards a plane at an outbreak location, multiplied by the probability that the patient takes one among very many possible routes to a destination and gets off the plane, he can work out the Relative Import Probability, or the probability that an infected individual arrives at any location in the worldwide air-transportation network. His forecast can demonstrate, for example, that there is a Relative Import Probability of 3.69% of the disease moving from Freetown to London Heathrow, while of it being transmitted from Dakar to Brussels Airport there is a 5.1% relative import probability. The actual import risk is greatly lower than the relative import risk, which is useful for comparing different locations, but alone does not predict the import probability at a certain destination.

“So what’s going on is not that the spread of infectious diseases is in any way more complicated nowadays, it’s just that its complexity is hidden in the complexity of the air transportation network,” Brockmann said. “If we introduce a more practical, or more suitable, way of thinking of distance, everything becomes just as predictable as the outbreaks of the past centuries.”

The most recent research project led by the Robert Koch Institute is entitled AIRSAN. The project aims to support EU Member States in ensuring a well-organised and coherent response to public health threats in air transport. ACI Europe is one of the associated partners of the project.

The role that airports play

With the phenomena of contagions far expedited by the complex air transport networks of our globally connected age, each of the parties with a stake in the passenger journey has a role to play in the safety of not only travellers, but everyone with whom they may come into contact.

The authorities of the countries most severely afflicted by the outbreak of Ebola have introduced health checks.
upon departure from their airports that include temperature checks for fever, while passengers must also fill out a form stating that they have no symptoms of the disease. In the event of a suspected case of the disease, the passenger will be denied boarding. Should a suspected case become apparent during a flight, the airline crew members will alert the emergency medical services who, in turn, will alert the airport medical services. The person or persons concerned will then be taken on arrival to be diagnosed and, if necessary, transferred to the appropriate facilities. At the destination airport the rest of the passengers will be subject to ‘tracking’ – the completion of an information sheet with contact details and seat number onboard before leaving the aircraft.

Amid the most acute epidemic in our recent history, the pivotal role of Europe’s gateways is primarily to reassure its passengers and staff through information. Many airports across the EU are engaged in information campaigns and working closely with their national health authorities.

For instance, in accordance with the request of the French Ministry of Social Affairs and Health, Aéroports de Paris has set up an information campaign to inform passengers in the arrivals and departures areas of all terminals at Paris-Charles de Gaulle and Paris-Orly. Amsterdam Schiphol Airport provides passengers flying to Lagos on its twice-daily flights with information about Ebola and the risks, and what, in particular to avoid. Passengers who arrive in the Netherlands from Lagos are checked for fever, and also receive information about Ebola. Brussels Airport, meanwhile, which has strong links with Africa due to its colonial connections to the continent, was immediately concerned by the dangers of the epidemic. Working alongside the Belgian Ministry of Health and Brussels Airlines, it provides a comprehensive catalogue of information to its passengers via its website, which has a dedicated section devoted to precautions to take in instances of Ebola.


Professor Brockmann’s pioneering map, more suited to the way we travel today, takes an intuitive stance, replacing physical distance with a more effective kind of measure that resembles traffic and frequency – the more traffic there is, the shorter the distance between two places. Global links, major and minor, to London’s Heathrow Airport, are plotted here in terms of their connectivity to, rather than distance from, the UK hub.

ACI EUROPE’S ACTION ON EBOLA

Airports' preparedness for outbreaks is a regular subject for discussion in the ACI EUROPE Facilitation and Customer Services Committee’s meetings. In the case of the current spread of Ebola, ACI EUROPE has been tracking the outbreak since it began and reminded members of their obligations under international Health regulations. It also issued regular updates to its members with all the various risks assessments of the Ebola outbreak provided by the European Centre for Disease Prevention and Control (ECDC) and the World Health Organization (WHO).

In addition, ACI EUROPE Director General Olivier Jankovec has actively participated in the European Aviation Crisis Coordination Cell (EACCC)’s work on Ebola over the summer, while Facilitation and Communications departments of the largest European airports and hubs also received updates from ACI EUROPE.
**€10,000 donation to ACI Africa Scholarship on occasion of Ad Rutten’s retirement**

On the occasion of the retirement of Amsterdam Airport Schiphol COO Ad Rutten, there was quite a turnout. Mr. Rutten featured regularly in airport news, not least during his two-year tenure as President of ACI EUROPE. He began his airport career working in the police force at Schiphol, moved to KLM and other partners on the airport site, eventually moving to Schiphol Group. To mark his retirement and his tireless work for ACI EUROPE, Schiphol made a special presentation of €10,000 to the ACI Africa Scholarship. This generous contribution will allow staff at African airports to receive more training, especially on safety and security issues. This gesture was additional proof of Mr. Rutten’s exceptional dedication to Airports Council International and the airport industry at large.

**Dublin International Aviation Training Academy Welcomes Oman Delegates**

IATA, the training arm of daa International, has now started to welcome delegates from Oman Airports Management Company (OAMC) as part of its major contract to train staff from the company. The first group of 10 Omans arrived in August and in total more than 100 OAMC employees will come to Dublin and Cork airports over the next 18 months to complete training with DIATA.

The training process consists of a blended approach of 20% classroom learning and 80% practical training, as OAMC staff are embedded within the DAA operation working with their counterparts there.

Extending a Céad Míle Fáilte to the first Oman group, DAA CEO Kevin Toland said he looked forward to growing the existing relationship with OAMC, which had its roots in the ARI relationship with Muscat Duty Free. Both parties had a strategic objective of growing and fostering a productive and profitable longer term relationship, he added.

Kevin Toland, CEO DAA; Colm Moran CEO daa International; Dr. Moaman Al Busaidi, IT & Communications General Manager, OAMC; and Mediha Al Aidarus, IT & Communications Specialist, OAMC.
A compelling market: the future of Birmingham Airport

When the British economy faced near collapse amid the global financial crisis of 2008 the aviation industry, like countless others, was jolted by its impact. Six years ago, as a result of the fiscal downturn, the UK’s airports saw a combined drop in traffic equivalent to Gatwick Airport’s annual throughput, but recent months have seen a resurgence in passenger numbers at the nation’s gateways to heights unseen since before the recession – an indicator not only that the market is recovering, but that confidence has returned to the marketplace.

The recent unprecedented growth at Birmingham Airport serves as evidence of the changing environment. April’s 16% month-on-month passenger increase at the beginning of this financial year would be the first in a series of record-breaking months that continued into May, June and July – which was its busiest month since 2008. At the availability of the latest figures, August 2014 is now the busiest month in the airport’s history with just over 1.1 million passengers, while the 200-millionth passenger also flew from the facility – coincidentally in the month of its 75th anniversary. The prospering market has also prompted growth amongst the airport’s legacy carriers, and along with increased frequencies is stirring stimulation once again in its route network.

This successful summer also saw the first use of Birmingham’s £40 million (€51m) runway extension – the departure of a China Southern flight to Beijing, which marked the historical start of the only direct service between the UK and China not operated from a London airport. Work to add an extra 400m to the existing runway began in November 2012 after years of planning, and has opened a wealth of opportunity for the Midlands’ primary gateway.

Building bridges with China

The landmark first flight from China to a non-London UK airport was one of a number delivered to Birmingham that summer chartered by Chinese tour operator CAISSA, which sold out with a rapidity that surprised both the airport and the operator. “They had flown to Heathrow and to Gatwick before, but this was a real coup for us,” said Paul Kehoe, Birmingham Airport’s CEO. “It was down to the fact that we’ve spent a lot of time working with Chinese tour operators and, rather than focusing on having a scheduled service from day one, demonstrating there was a demand – and that we could service that demand.”

Though its advantageous position gave the airport the opportunity to show its Chinese passengers a different England – the Cotswolds, Bicester Village, and the place where Shakespeare was born and lived – Kehoe explained that airlines from long-distance destinations such as China have a tendency to look on the UK as being ‘only London’ and, as such, adopting a fixed route to the Far East is a challenging move, to which a slow and steady approach must be taken.

Birmingham is a pivotal industrial centre for the country. In fact, more than half of manufactured goods in the UK are produced in the Midlands, which has a flourishing automobile trade that thrives on its business with China – now the number one export market for its leading manufacturer Jaguar Land Rover. “The key thing for us is our community,” Kehoe emphasised. “Our locality needed Indian flights, so we went and we got them on the back of what the community wanted, and now what we
are hearing from our local community is that our consumers want access to China. But airlines are notoriously a conservative bunch and will not take any risks, so we had to demonstrate that there was an opportunity to bring captive passengers – i.e. charter passengers – into the UK market, and that airlines can make money.”

His hope is that the prosperous first flights will lead to another series of services next year, and ultimately to a scheduled service whereby the local community can make the connections they want. “Because,” he stressed, “they don’t want to fly via other hubs sometimes, and they don’t want to drive down to Heathrow. They have to because that’s the only way out there, but this was a market test – and it’s been proven that it works.”

**Birmingham’s potential**

The increasing traction of an invaluable route to China demonstrates the ever-strengthening relevance of Birmingham Airport as a key gateway outside the capital, and its burgeoning passenger numbers are an encouraging sign that people are beginning to eschew London’s hubs, as more travellers choose their local airport. “We provide about 140 routes out of here to direct destinations – and then they connect on to others. Increasingly, what we’re seeing is that people are voting with their feet, and instead of flying round in circles around south London are looking for direct access,” Kehoe said.

The airport does, however, still face challenges, he explained, and in the acquisition of Chinese and Indian connections stands in the direct line of fire of competition from those airports in other economic bedrocks of the UK – Gatwick, Heathrow, and Manchester. Then, of course, there are the European hubs vying for the attention of the most valued carriers of the moment such as Air China, Hainan and China Southern – “they’ve got a plethora of airports to choose from, and if they can make more money out of Athens-Beijing than Birmingham-Beijing, then they’ll fly the aeroplane to Athens,” Kehoe commented.

“But it does come back to one fundamental. And that fundamental is that the UK economy is growing – and the Midlands’ economy is growing at a faster rate. And while that continues, and there continue to be restrictions in the London market, I think that we are positioning ourselves well.”

“I’m not saying that we’ll pick up traffic overnight – if you’ll pardon the pun I think it will be a very long haul – but there is a real opportunity in the medium to long-term for Birmingham,” Kehoe stated. “With all the right assets now deployed, after spending £200 million (€250m) in the last five years, we hope airlines will see that there is success and profit to be made out of the Birmingham market.”
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Kerry is Ireland's most visited tourist region outside Dublin. Its main source of traffic is largely inbound dominated, with its main markets being tourism-focused, and these factors determine its route development strategy, as Carol O’Donoghue, Route Development & Marketing Manager, Kerry Airport, explained to Ross Falconer.

Kerry Airport focused on building long-term sustainable routes

Ireland’s tourism industry grew by over 13% during the first six months of this year, and Kerry Airport has been a witness to this growth. A key factor has been the Wild Atlantic Way – the 2,500km route along the Atlantic coast from Cork to Donegal, which is the longest defined coastal drive in the world. Kerry Airport is only 14km from the coast, so is one of the key access points to Ireland’s most recent tourism success story. “It is our intention to capitalise on this,” asserted Carol O’Donoghue, Route Development & Marketing Manager, Kerry Airport. “It has always been our argument that if an airline is developing routes to Ireland, then they will need to rely heavily on inbound dominated tourism and Kerry Airport is situated in the jewel of the crown of Irish tourism, attracting record numbers of tourists to the region year-on-year.”

The airport expects to handle 300,000 passengers this year. While slightly down on 2013 – partly because of Ryanair reducing frequency on its Stansted service – it is 4% up on the airport’s budgeted passenger numbers for 2014. The proactive strategy being employed has seen Kerry Airport work closely with local government and various tourism organisations over the past two years. “Our route development strategy is closely tied to the successful application of destination marketing initiatives,” O’Donoghue explained. “As the airport in the region, we need to be a key player in the destination marketing organisation to ensure we are all working cohesively and focusing our resources correctly to increase traffic on existing services, and also target routes that can generate traffic from our source tourism markets. In the short to medium-term, our focus is on the three tourist growth markets for the region: UK, France and Germany. It is our intention that as an airport we attract routes that have long-term sustainability. As a destination, we have been working together to identify the markets and potential routes that we know would work and are willing to support.”

Kerry Airport celebrated the 25th anniversary of its first scheduled flight in May, and significantly the first two scheduled services – Aer Lingus to Dublin and Ryanair to London Luton – are still in operation, reinforcing the airport’s policy of building sustainable routes.

The Dublin route is of vital importance to the region when looking at business development. “We have a number of large home-grown multi-national companies, such as Kerry Group and FEXCO, both of which rely on links to get their executives to the various offices around the world and also bring customers in,” O’Donoghue said. “The airport can and has acted as a selling point in attracting new companies to the county, such as an arm of the Japanese bank JRI America, as well as encouraging new start-ups that, with access to Dublin and beyond, setting up a company in Kerry is not an obstacle to growth. The Kerry-Dublin route also acts as a feeder of tourists to the county, with Dublin Airport being the main access point for overseas visitors to Ireland.”

The latest route announcement has been the opening up of long-haul markets via Aer Lingus and Etihad, which has been a hugely important development for the region, both for tourism and business. Passengers can now book online with Aer Lingus from San Francisco International Airport, New York-JFK, Boston Logan International Airport, Chicago O’Hare International Airport, Orlando International Airport, and Toronto Pearson International Airport to Kerry, connecting in Dublin, which has US border pre-clearance facilities. Etihad offers bookings to Kerry from Australia, the Middle East and Asia, also connecting in Dublin. “We are in talks with a number of airlines at present about future new routes and these negotiations are ongoing,” O’Donoghue added.

Meanwhile, it has been announced that Kerry will host CONNECT 2015 next June, enabling the airport together with its tourist partners to highlight the potential of the region to the airlines in attendance. “As a county our main industry is tourism, and as a provider of tourists to the region the airport plays a vital role in the social and economic well-being of the area in terms of employment both directly and indirectly,” O’Donoghue concluded.
Discover Your Irish Routes.

As an independent airport we have a fresh approach to doing business with our airline customers. With competitive prices, attractive incentives and a strong pent-up market demand, it’s time you gave Shannon some fresh thought.

We’re for Shannon. Let’s Talk.

Declan and Isabel, Shannon Airport
For the perfect example of an effective route marketing strategy, look no further than Shannon Airport. In September, it won best airport under four million passengers at the World Routes Awards 2014, which recognise excellence in airport marketing. This was appropriate recognition of the tireless approach taken by the airport’s team since its independence.

Last year, its first as an independent entity, was all about consolidation for the airport and halting the five-year decline in passenger numbers, which it successfully achieved. This year, by contrast, has been all about growth and Shannon Airport is looking at a double-digit increase in passenger numbers.

“Winning at the World Routes Awards is an amazing achievement for Shannon, not least so soon after it was made an independent entity. It’s not just the winning of the award, but also the fact that the awards are decided on by the airlines themselves. Airlines are a key constituent and this shows Shannon is turning a lot more heads now,” Neil Pakey, CEO Shannon Group, commented. “It has not been achieved without hard work, however, and there is a lot more of that ahead of us, but the World Routes award is outstanding recognition for our team at Shannon. It sends a clear message to them that they are very much on the right track and we continue to remain there.”

Shannon Airport is unique both in its location and place in the history of world aviation. Situated at the most westerly point of Europe, it is synonymous with innovation, including the world’s first duty free shop (opened in 1947) and Europe’s first full US Customs and Border Protection (CBP) pre-clearance facility, which opened in 2009.

Gateway to the Wild Atlantic Way

The tourism potential of Shannon is clear. Pakey explained that Shannon Airport is the key gateway for the Wild Atlantic Way – the 2,500km route along the Atlantic coast from Cork to Donegal, which provides an unforgettable experience, showcasing the scenery and unique features of the Atlantic coast of Ireland. Tourism Ireland figures show a double-digit increase in the number of visitors to Ireland in the first six months of 2014, emphasising the potential of the Wild Atlantic Way. ‘The 10% increase across the board nationally is very welcome and we have definitely witnessed that here on the ground across the West of Ireland. Our passenger numbers at Shannon for the first six months of the year have even outpaced the national average as we are up by 15%.’ Pakey said. He added that ‘there is huge opportunity for further growth with the Wild Atlantic Way, which Shannon is the key gateway airport for given that we provide US, UK and European services.’

Among the most recent route developments, Ryanair is strengthening its winter schedule from Shannon Airport with the addition of further capacity from the end of October. It is adding a daily Manchester service, replacing a three times weekly Liverpool service, and a weekly Kaunas service, as well as extra flights to London Stansted. This raises to 11 the total number of Ryanair services from Shannon this winter – six more than the previous winter season. The new routes operated by Ryanair from Shannon this winter are Paris, Berlin, Fuerteventura, Warsaw, Krakow, Manchester and Kaunas. These are in addition to existing services to London Gatwick, London Stansted, Lanzarote and Wroclaw.

The myriad successes Shannon Airport has achieved in its short time as an independent entity are testament to the proactive approach and dedication of its team, and it certainly seems that there will be no let-up in that momentum.
Cork Airport focusing on increased connectivity and regional economic growth

Cork Airport, part of the DAA Group, is the international gateway to the south of Ireland. It handled 2.3 million passengers in 2013 and expects a similar throughput this year. The strategic plan for the airport is to grow to 2.8 million passengers over the coming four years, back to levels experienced in 2008, as Anita Gackowska, Head of Aviation Marketing, Cork Airport, explained to Ross Falconer.

Cork and the greater Munster region is a real hidden gem – both as a business and leisure destination. Three scheduled airlines – Aer Lingus, Aer Lingus Regional and Ryanair – together with Ireland’s leading outbound tour operators, operated services from Cork to over 50 destinations across Europe last year.

The strategy for further development is to work closely with key stakeholders, such as the Chamber of Commerce, Tourism Ireland, and the many major international businesses that have their European offices in Cork, to identify the destinations needed to fulfil their requirements, not only for the business traveller but also the leisure traveller.

A key figure in realising that strategy is Anita Gackowska, Head of Aviation Marketing, who joined the airport in May, and described it as “an exciting new challenge”. “The airport is operating in a very competitive market, but we have managed to maintain fairly consistent traffic levels over a number of years, indicating a good base of travel both outbound and inbound,” she commented. “My priority since joining is to ensure that the airport is positioned well to attract new routes. There has been some excellent work done by my predecessors in attracting new routes, but I will use my experience to look at the market from a slightly different perspective, bearing in mind my overseas experience and also airline experience.”

Indeed, prior to joining Cork Airport, Gackowska was Head of Marketing at Aena Aeropuertos, having previously held positions with Vueling, easyJet and British Airways. “I have been at the other side of the table, so I understand some of the challenges airlines face when making important business decisions, such as starting a new route,” she added. “I will be, and have already started in some cases, working closely with our airline partners, both current and future, to build a long-term sustainable route network from Cork.”

Increased connectivity to key cities in Europe is a focus for the short-term, while a direct transatlantic route remains a medium-term objective and would be a major catalyst to the economic and tourism development in the region. The airport’s successful Route Incentive Scheme offers a 100% discount on airport charges for the first year of new routes, followed by an 80% discount in year two, and further discounts up to year five. “This gives airlines clarity on long-term spend – something that is needed to build long-term sustainable route profitability,” Gackowska commented. “Aer Lingus Regional has increased frequency on key UK provincial routes to Manchester and Birmingham from double-daily to three times daily on selected days. And a new Aer Lingus Regional route to Newcastle was launched earlier this year for its summer schedule in the context of a major expansion package by the regional carrier.”

A key strategic aim is securing a Cork-Dublin route, which would feed long-haul connecting flights from Dublin Airport, and is something Gackowska and her team have been actively pursuing and pitching to prospective airlines.

Cork Airport is also committed to securing jobs for Ireland through the ConnectIreland initiative. Gackowska explained how it works: “Through the initiative, anyone who hears of an overseas company thinking of expanding abroad, lets ConnectIreland know. ConnectIreland then does the rest and if jobs are secured in Ireland, a reward is paid to the initial contact of up to €1,500 per job.”

ConnectIreland continues to go from strength-to-strength. There have already been 164 new positions created in Cork through the initiative, which is on target for 1,000 jobs in communities across Ireland. Ireland has clear global appeal, and as the midway point between Europe and America is perfectly positioned to attract expanding companies.

“We are delighted to support ConnectIreland in creating jobs and driving economic growth back to the region. Cork Airport is very important in terms of connectivity for the business and the multi-national sectors in the region, and has a vital role to play in facilitating and developing inbound job creation in the region,” Gackowska concluded.

Anita Gackowska, Head of Aviation Marketing, Cork Airport: “We are constantly engaged with current and potential airline customers with a view to growing the range of destinations served from Cork Airport. We are in discussions with a number of airlines and are working hard to secure new routes.”
Baggage handling innovations

Here, Airport Business explores some of the latest baggage innovations, which are providing faster baggage transport, greater system flexibility, and enhanced reliability.

EYE4U: Vanderlande’s wearable video-based help desk support

Key to the successful operation of baggage handling systems is, of course, effective technical support, and one of the latest innovations in this area is Vanderlande’s EYE4U, which provides real-time video-based technical support. Using live images is said to make diagnosing and correcting situations quicker, increasing baggage handling system availability. The live video images also help to overcome possible language problems and communication misunderstandings, which can be the case with traditional voice-based support.

Bergamo Airport is the first airport at which this remote monitoring tool will be implemented. The airport recently awarded Vanderlande the contract for both equipment and services for the upgrade of its arrivals area. The two-year service contract includes new products like EYE4U and MMS (Mobile Maintenance SCADA solution) as well as more traditional products like spare parts, 24/7 hotline, preventive maintenance, corrective maintenance and training.

EYE4U utilises a hands-free video camera and two-way communication, so service personnel at airports can easily work through support questions or troubleshooting with live instruction from a helpdesk specialist. The head-worn camera unit is light and compact and the recorder allows up to nine hours of excellent quality recording. EYE4U comes with a wireless remote control for quick, easy video and image capturing. All live video and image streaming is encrypted for secure communication and can only be accessed by authorised helpdesk specialists. These capabilities clearly make EYE4U a valuable support tool that optimises communication, and as a result enables accurate diagnosis and fast, effective problem-solving.

EYE4U is an option within the Vanderlande hotline & helpdesk support services and further extends the helpdesk capabilities to increase effectiveness, speed response and correct problems in the shortest possible time.

ALSTEF awarded Zagreb baggage contract

ALSTEF has been awarded a contract for the design and installation of the baggage handling system at Zagreb Airport by Bouygues Bâtiment International Croatia Branch.

Bouygues Bâtiment International Croatia Branch is responsible for the construction of the new terminal at Zagreb Airport, scheduled to open in the last quarter of 2016 and operated since 2013 by the consortium MZLZ formed by Bouygues Bâtiment International, Aéroports de Paris Management, TAV Airports, and a subsidiary of the World Bank.

The contract awarded to ALSTEF includes the design and installation of one additional check-in island, with a separate screening line, within the existing terminal, which recently became operational. It also includes the design and installation of a comprehensive baggage handling system, including automated baggage handling, hold baggage screening, and sorting of bags at arrivals and departures. Other elements include two new 15-desk check-in islands, with the option of adding two others, two screening lines, an automatic sorter, and four baggage delivery lines.

The works at Zagreb Airport will be completed over a 30-month period, in time for the opening of the new terminal in Q4 2016.
DSG is proud to introduce our new Self-service bag drop design, named, *Air.Go*. This innovative new solution may be fitted with the same functionality as our unique retrofit 1-and 2-step solution. Designed as a modular system, making it possible to customize the airport design profile.

The following features are available: Touch screen operation with modern user interface for the passengers, barcode scanning, RFID bag tag reading, boarding pass scanning, passport scanning, NFC access management, intrusion detection, length/height check, scaling, payment solution, receipt printing, bag tag printing and more.

Visit our website for more information [www.dsg-systems.no](http://www.dsg-systems.no)
**Dynamic baggage handling solutions**

Crisplant, part of the BEUMER Group, has announced that the CrisBag high-speed baggage transport system, with Smiths Detection’s HI-SCAN 10080 XCT explosives detection system, has been certified to European Civil Aviation Conference (ECAC) Standard 3 for in-tote screening.

With this approval, the integrated CrisBag and XCT systems deliver high-speed baggage transport for airports, combined with benchmark throughput and certified baggage security, in a single, cost-efficient solution.

Crisplant’s Johan Rajczyk explained to Airport Business that in addition to fast baggage transport and system flexibility, CrisBag enables airports to maximise the baggage screening process by providing 100% track and trace all through the screening and baggage handling process. He stressed the importance of this comprehensive track and trace capability, and also emphasised the importance of the built-in RFID chip in the baggage handling totes, which is said to improve the baggage security level compared to conventional barcode tracking.

Crisplant was among the first baggage handling systems manufacturers to introduce in-tote screening to the market. Rajczyk said that the concept of in-tote screening, and its implementation in the CrisBag system, has been widely recognised as a breakthrough in secure and efficient baggage handling. Most recently the CrisBag system has been installed at London Gatwick Airport, Düsseldorf Airport, Singapore Changi Airport, Bergen Airport, Abu Dhabi Airport, Calgary Airport, and Ottawa Airport.

Meanwhile, the integrated transport and in-tote screening system has reportedly also set a benchmark with a tested throughput of more than 1,300 totes per hour.

Another trend that Rajczyk highlighted is the dynamic bag store – a concept Crisplant is implementing in the new terminal at Bergen Airport, which opens in 2017. The system that Crisplant is supplying and integrating at the airport is the first to combine Crisplant’s CrisStore dynamic Early Baggage System, which enables on-demand sorting of baggage for speed-loading to ULD and trolleys, with the CrisBag tote-based system. Rajczyk explained that the system enables baggage handlers to monitor the status of baggage at the customised operator workstations next to the speed loader work spaces. When ready, the baggage handler can release a full batch for automatic loading to a specific flight, or call specific bags or group of bags to the make-up area as required.
John Holland-Kaye took on his new role as CEO at London Heathrow Airport in July. In his previous role as the airport’s Development Director, he played a pivotal role in the delivery of the new Terminal 2: The Queen’s Terminal, and has also been heavily involved in developing the new approach to Heathrow expansion, which has been shortlisted by the Airports Commission. He outlined his initial priorities as CEO to Ross Falconer.

Delivering ‘a quick, simple, and consistent passenger journey’

John Holland-Kaye’s background prior to joining Heathrow, while not directly in the aviation sector, does contain a wealth of very relevant management and construction industry experience. He was previously Divisional CEO with Taylor Wimpey PLC – one of the UK’s largest house builders, having held a number of positions including Operations Director of Taylor Woodrow Developments and Commercial Director of Taylor Woodrow Inc. Before that, Holland-Kaye was Managing Director, National Sales Division, of Bass Brewers, and has also worked as a strategy consultant with LEK Consulting for a number of high-profile businesses.

Joining Heathrow as Commercial Director in May 2009, he was responsible for a 30% growth in retail income, as well as an improved passenger experience. Holland-Kaye then became Development Director in November 2012, and was responsible for delivering the £1 billion (€1.3bn) annual investment in transforming Heathrow, including the new Terminal 2: The Queen’s Terminal, which opened in June.

He is clear about his overriding aspirations as CEO, which are “to improve Heathrow as much in the next five years as we have in the last five years”, and to make the airport “Europe’s hub of choice”.

Key to this is an enhanced passenger experience, and a few minutes in Holland-Kaye’s company confirm his drive to deliver that. The new Terminal 2 is an embodiment of that vision, providing “a quick, simple, and consistent journey, that puts passengers in control of their time”. Indeed, part of the philosophy is that Terminal 2 can deliver a quick and streamlined quality of experience akin to that of a small-scale airport, while still providing passengers with the connectivity of a leading international hub. “It’s also making sure we tailor our services for different types of passengers, because families have different needs to business passengers, and we must ensure a seamless flow for them,” Holland-Kaye added. “And we’ve pioneered a lot of these things within Terminal 2. There’s more that we can do, and I also want to extend that across the other terminals, and make sure that, no matter which terminal you’re flying from at Heathrow, you feel like we have thought about your needs.”

Strengthening Heathrow’s connectivity

The co-location of the 23 Star Alliance member airlines, as well as Aer Lingus, Virgin Little Red and germanwings, in Terminal 2 is a strength of the airport’s connectivity, enabling much quicker connections for transiting passengers. The ongoing development of the airport is also making it much more attractive to the airlines, with Air China having increased its daily Beijing service to twice-daily after moving into the new Terminal 2.
Marco Pernetta was appointed Managing Director of Innsbruck Airport in April, continuing his career with the airport, where he has been a Member of the Executive Board since 2005.

Prior to joining the airport, Pernetta spent several years with the German Airports Association (ADV), where he was responsible for bilateral negotiations and gained invaluable experience of the workings of the European institutions.

He has taken the helm at a time of growth – the latest available figures show a 2.4% increase in passenger numbers during August, and throughput is expected to reach one million this year.

Pernetta’s initial priorities have centred on the airport's infrastructure plans. "We’re investing €12 million in two major projects," he explained. "One is the new car park, which will double the capacity of the existing facility. Meanwhile, in the terminal area we are rebuilding the baggage sorting area behind check-in, and introducing two additional security lanes. Our 11th boarding gate opens this winter, and our 12th will open next year."

Innsbruck Airport is also continuing its emphasis on environmental sustainability, and next January will introduce a new noise insulation scheme for those neighbouring properties affected. "This is a fascinating, challenging industry, which is changing every day. Particularly in a small regional airport, you are in close contact with all aspects of the business, so each day is different," Pernetta concluded.

"Then we’ll close the old Terminal 3, and at that point we will have a completely new airport," he explained. "The most modern and efficient, most passenger-oriented airport in the world."

As our conversation draws to a close, Holland-Kaye confides one final word on his ambitions for the world’s busiest international airport: "I want to take Heathrow from being one of the best airports in Europe to being one of the best in the world, and we do that by delivering a really fantastic experience for passengers."

connection is a very important one for Heathrow and the UK.

Holland-Kaye has entered the role of CEO at an interesting time, and, as the decision of the Airports Commission in 2015 edges ever closer, is leading the approach to demonstrating that Heathrow is the right choice for new runway capacity in the UK.

"Airlines like Air China could have four or five daily services to Beijing – and if you think about where all the growth is going to be in the world, it’s going to be in distant markets like China, and North and South America," he said. "The problem is that we don’t have enough landing slots for Air China to fly four or five times a day, so we’re going to be missing out on growth by not having enough runway capacity."

Under Holland-Kaye’s leadership, Heathrow's transformation will continue; the next stage will see the closure and demolition of Terminal 1 next year, and the beginning of works to double the size of Terminal 2, due for completion in 2019.

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The passenger experience is at the very heart of the Heathrow strategy, and Holland-Kaye was on-hand to greet passengers on the day the new Terminal 2 opened.
Airports are striving to make the travel experience as positive as possible for Passengers with Reduced Mobility (PRMs), engaging with high quality service providers, and with a firm emphasis on the best training and the best equipment.

AAT’s devices are in use at more than 150 airports. The company manufactures and supplies the s-max aviation stairclimber to PRM service providers, airports, airlines and private organisations throughout the aviation industry. “The s-max aviation is very popular with operators as it is extremely versatile, compact, efficient, safe, dignified and cost-effective for boarding PRMs onto virtually all aircraft types,” Ralf Matthes, COO, AAT, commented.

The s-max aviation has been under constant development since the original version was launched around 10 years ago, with direct input from customers and aircraft operators, and has seen many significant improvements to increase the range of aircraft it can operate on. “Currently we are finalising a ‘smart step mode’, which makes the climbing process softer and even more comfortable for the passengers,” Matthes added. The s-max aviation chair has been specifically designed to work on the variety of steps used on aircraft, and enables the passenger to be moved from the ground right to their seat in one operation.

“We have and still do work closely on the ground with airport PRM service providers and airline technical staff to improve the s-max aviation chair, and we always welcome feedback from operators and passengers,” Matthes concluded.

Providing a positive, seamless experience for PRMs

Airports’ comprehensive efforts to provide an enjoyable customer experience include services for Passengers with Reduced Mobility (PRMs). Airports work closely with all relevant stakeholders to provide as seamless and stress-free a journey as possible. Here, Airport Business examines some of the latest developments from key service providers.

The s-max aviation chair has been specifically designed to work on the variety of steps used on aircraft, and enables the passenger to be moved from the ground right to their seat in one operation.
Innovative web app to improve end-to-end passenger experience

OmniServ, a subsidiary of Air Serv & ABM, and one of the UK’s leading airport service providers, has launched an innovative web app for employees, enabling them to present relevant information to passengers based on the role they are performing at the airport.

Developed by OmniServ, the web app has been optimised to work over 3G and the software is designed for use on electronic devices such as iPads. The app has been created to enable OmniServ staff to engage with customers in the airport environment without interrupting the service delivery with long and complex feedback and data capture reports. It was designed with a view to connect OmniServ’s workforce across all terminals and locations throughout the departures, arrivals and connections journeys.

“The app enables the employee to engage with the passenger no matter what language or question asked,” explained Antony Marke, Director Passenger Services, OmniServ. “We use a version of Google Translate to enable the employee to communicate and allow internet searches to ensure we are always ready to help.”

Key features of the new app include unique staff member logins, a ‘Frequently Asked Questions’ section, a ‘Shift Impactors’ section which provides a quick way of logging anything that impacted service delivery during the shift, the ability to share and promote the Heathrow app, and an ‘Incidents’ function which includes an automated email alert to the relevant health and safety department, when necessary.

OmniServ acquired experiential and staffing agency Blackjack Promotions in August 2013 following the award of the Passenger Service Ambassador contract at London Heathrow. This is the first step from the alliance in line with its focus to use new technology to deliver a higher level of customer service and improve the end-to-end passenger experience for passengers travelling through the airport.

The new app enables staff to share key information from different locations across the airport, allowing proactive preparation for sudden influxes of passengers and dynamic deployment of resource.
Innovation in the airfield

The airfields at our international gateways are some of the most challenging environments in the industrial world, and their rigorous maintenance is vital to the safe and efficient operation of airports. Ever-evolving airside requirements, such as increasingly stringent legislative regulation, the needs of new generation aircraft and increasingly important sustainability targets, present ongoing obstacles at airside, and airports must ensure that all are met, while still fulfilling their own operational and financial obligations. Above all, airports must manage their airside resources intelligently, safely and efficiently, and partnerships with the industry’s leading manufacturers and solutions providers are a fundamental part of achieving this. Here, Airport Business highlights some of the companies at the forefront of aviation safety, to explore the ways in which they are enhancing operations at airports worldwide.

Safer runways with a smarter approach

“For as long as airfield safety remains a major concern, a combination of Airfield Ground Lighting (AGL) systems, LED airfield solutions, design and smarter maintenance will remain a priority for airport operators worldwide,” established Christian Onselaere, CEO of world-leading airfield technology company, and specialist in airfield lighting.

ADB Group. ADB provides end-to-end, integrated and sustainable solutions for visual guidance, including airfield and airport lighting, and recently implemented one of the world’s largest turnkey airfield ground lighting projects at the brand new Hamad International Airport in Doha.

By intelligently managing five key airfield aspects from landing to take-off, ADB believes airports can achieve ‘Smarter Safety and Reliability’. The Group’s answer to the challenges that face the airfields of today is its five-point strategy, starting with ‘Smarter Design’, which makes the best use of an airport’s topography and meteorological conditions, and incorporating its ‘Smarter Approach’ and ‘Smarter AGL’, including technology from Group companies – ADB Airfield Solutions, LUCEBIT and ERNI AGL.

For large and complex airports like Amsterdam Airport Schiphol, integrated systems are essential. Safegate Group and its partners Imtech have recently been awarded the contract to provide the ASP-SafeControl integrated system to Schiphol’s bustling airfield.
Finally, ADB implements ICAO-compliant ‘Smarter Maintenance’, with its structured, preventive approach, to optimise airside availability and safety of maintenance staff. ADB, Onselaere explained, is in a unique position to deliver its complete, all-LED ‘Smarter Approach’. “Fully ICAO-compliant, it comprises our proven LED AGL and LED Approach. Threshold, and Runway End lighting (LEAP), and ERNI’s LED Flashing lights and Approach Inset lights, our LED Papi – which offers several industry-firsts – as well as Exel’s frangible lattice masts and poles for approach lighting,” he said. “Together, these solutions deliver the superior energy efficiency, performance and cost benefits of an all-LED solution and allow our customers to benefit from safer and greener runways.”

ADB’s LED Papi, or Precision Approach Path Indicator, uses a single LED light channel on each light unit to provide the pilot with precise visual information, enabling the approach procedure to be performed with the utmost accuracy and safety. “We wanted to design the most user-friendly product possible, and that is what I guess we have achieved here,” Onselaere said. “Most of the maintenance burden of traditional Papis is about checking the alignment, and cleaning the interior from dust or sand at the occasion of the lamp change. The LED Papi makes that much easier – a digital display on the side of the unit shows in real time the inclination of the unit, meaning there is no more need to open the box, adjust the alidade and install it – a real maintenance-free product!”

**ASP-SafeControl at Amsterdam Airport Schiphol**

As an international transit hub that served over 52 million passengers in 2013 – with numbers expected to increase for 2014, Amsterdam Airport Schiphol heavily relies on state-of-the-art solutions to keep the airport moving, and Safegate Group, and its partners Imtech, have been awarded the contract to provide the ASP-SafeControl integrated system to Schiphol’s bustling airfield.

Safegate Group is a solutions provider for the airport industry, and as an Airfield Lighting (AFL) industry leader, it has over 20 years of experience with Individual Lighting Control and Monitoring Systems (ILCMS) – Safegate’s ASP-SafeControl. AFL is a large part of Safegate’s legacy, and with this contract at Schiphol, as well as a number of others, it continues to be an expanding part of the company’s future. ASP-SafeControl is an ILCMS that offers a range of benefits for airports. This integrated system enhances airport ground operations in terms of safety and efficiency, all the while contributing to the environmental investments and commitments of an airport. When critical airport areas need maintenance, ASP-SafeControl enables the tower to re-route airport traffic efficiently and safely with more awareness than before. It features proven backwards compatibility and uniquely designed easy-to-install hardware. For large and complex airports like Amsterdam Airport Schiphol, integrated systems are essential. They minimise human error and improve coordination in various mission critical airport activities. With Safegate’s ASP-SafeControl, Schiphol will not only be able to improve its overall performance, but become a future-proof airport. Schiphol, if it so chooses, will be able to easily upgrade the ASP-SafeControl to enable the Follow the Green Concept in its everyday movements, which is essential to maintaining throughout in difficult weather conditions. Singapore Changi Airport already benefits from this advancement, and many airports are following this best practice for Category 3 conditions.

**Innovative design, environmental approach**

Fundamental to the safe and stream-lined operation of an airfield are runways, taxiways and aprons free of contaminants and safety hazards. Over time, rubber build-up on airport runways creates a risk to the surface’s integrity. The Advance Cyclone 4006 deep cleans airport runway and apron surfaces more effectively, and in less time than other methods. A patented cleaning and recovery head cleans and removes rubber and paint build-up without damaging the surface – whether it is concrete or asphalt, and all water and debris is recovered without a vacuum via the solution’s exclusive cyclone technology, leaving nothing behind but a clean surface that dries quickly and is ready for immediate use.

Painted lines, meanwhile, are critical safety elements at airports and roadways. Advance’s Cyclone machines also remove painted lines without harming the surface, leaving it clean, dry and ready for repainting. 100% of the water used for cleaning, as well as the painted line debris, is recovered, ensuring an environmentally friendly solution to painted line removal.

Since its development in 1994, Advance’s Cyclone System has been tested in extreme environments, and used in some of the largest and dirtiest industrial areas in the world, including airport gates and runways. Throughout its product development and field-testing phases, Advance’s Cyclone has performed gate cleaning, runway rubber removal and paint line removal at most of the airports in the Pacific Southwest of the United States. Airports including Los Angeles, San Francisco, Phoenix Sky Harbor, San Diego, Portland International, Salt Lake City, Las Vegas McCarran, and St. Louis Lambert Field International Airport, to name but a few, can all depend upon the renewed reliability of their runway and apron areas thanks to Advance Cyclone Technology.

A great challenge for airports today is meeting operational cost targets, but the solutions of Advance Cyclone Technology satisfy this need. Its water consumption is extremely low – only 0.5 litres/sqm.
are used for rubber removal compared to the typical 1.5 litres/sqm. Less fresh water needed to filter also prolongs the life of the filter, while using less water also means that there is less to dispose, reducing disposal costs. The machine, meanwhile, requires just simple computer control, and is handled by one man, reducing resources needed to operate it while, as there is no complex pressure vessel or tank needed to power a vacuum since the technology operates on a cyclone principle, there is less maintenance cost.

Visionaries in surface preparation

Today’s busy international airports handle ever-increasing levels of traffic, and necessary turnaround times for aircraft are becoming ever shorter. Modern airport runways have to be capable of safely landing new generation aircraft with greater weights and higher landing speeds. Therefore, the braking performance of pavement surfaces has become far more critical, making runway surface condition therefore pivotal to the safety of an airport’s operation. There are many elements that can impact upon the surface of a runway, including structure, materials used, surface type, weather conditions such as snow, ice or water, and contamination from various sources, but especially from rubber deposits.

Blastrac specialises in skid resistance and rubber removal, using blasting. The basic blasting process has been around for over 100 years, and Blastrac was the inventor of the first mobile shot blasting process in the early 1980s. It is now the global leader in this field. Operating in over 80 countries, the Blastrac product range now has some 65 machines, from...
handheld products to truck mounted and fully remote controlled blasters. The Blastrac system is a mechanical process, which is designed to remove surface contaminants, surface imperfections and coatings.

The process is fully controlled, safe and environmentally sound. It uses no water, no chemicals or solvents, emits no pollutants or dust to the atmosphere, and the removed material can often be fully recycled. In the process, steel shot is fed by gravity through a control valve into an impeller. The impeller, turning at high speeds, throws the steel shot through an adjustable opening at high velocity and at a specific angle on to the surface over which the self-propelled machine is travelling. The steel shot then impacts the surface and bounces off, and as it does so material from the surface – be this contaminants, coatings or the surface material itself is abraded, and any loose material, together with the shot is drawn up into the machine by the airflow created by a vacuum unit.

According to Blastrac, over recent years, independent research has shown that shot blasting is the most cost-effective, environmentally friendly and highest performing technology for reducing the danger of slippery runways. In April 2014, the Blastrac 1-10DS shot blaster was used at Dubai International Airport for thermoplastic line removal. The thermoplastic material was easily removed and therefore the job was done in no time, reaffirming the safety of the airfield at one of the busiest international hubs in the world.

Ultra-High Pressure Runway Rubber and Paint Removal

Cyclone Technology’s family of airport specific products guarantees the best solution for you! Productivity is over 2000 m²/hour Rubber removal – over 300 m²/hour Paint removal. Removal rate is >95%. 100 % waste recovery without damage to texture due to Cyclone Technology

The CY4006AC
Purpose built chassis gives full range of view during operation.

The CY7500
3 rubber removal heads working width 2,40 meter, the ultimate in Road retexturing

The CY5000
perfect for cleaning Aprons, Gateways and and fuel-oil spillage removal

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INNOVATION SHOWCASE

Ranging from Google Glass-equipped agents to WiFi-based passenger tracking, a number of new initiatives are helping to improve the travel experience at Europe’s airports. Ryan Ghee reports.

Edinburgh Airport trials Google Glass for customer service

Customer-facing staff at Edinburgh Airport have been equipped with Google Glass as part of a trial to explore the viability of the wearable technology device as a customer service tool. Members of the airport’s customer welcome team will use the technology, which can be used to search the Web using voice commands. They will be able to provide travellers with real-time flight information and foreign language translation to help overcome any potential language barrier, as well as answer general enquiries about the airport and the city of Edinburgh.

Edinburgh Airport’s trial of Google Glass follows a similar pilot by Virgin Atlantic in the Upper Class Wing at Heathrow Airport earlier this year. Virgin Atlantic has since announced that it plans to make Google Glass a permanent fixture as part of its customer service strategy. “We’re always looking for new and innovative ways to improve the airport experience for our passengers and the Google Glass trial is a great example of how we’re thinking outside the box,” Gordon Dewar, Chief Executive of Edinburgh Airport, commented. “The fact that it’s the first trial of its kind in a Scottish airport is exciting as it shows we’re leading the way in how we interact with our passengers. Over the next few months we’ll be able to establish whether this product is suitable for an airport environment.”

Fraport adds premium ‘Home to Gate’ service

Premium ground experiences are usually exclusive to travellers who have paid for a premium seat onboard the aircraft, but Fraport has broken the mould with its new ‘Home to Gate’ service. Travellers do still have to pay an additional fee to make use of the new service, but it is open to everyone regardless of which airline they are flying with, which class they will sit in, or where they will be flying to.

Anyone living within 80km of Frankfurt Airport can book the service, which starts with a home pick-up in a Mercedes S-Class, Volkswagen Phaeton, BMW 7 Series or a Mercedes minibus. Upon arrival at the airport, a service guide then takes care of the check-in and baggage process, before the passenger is escorted to a fast track security line and onto their departure gate.

The launch of the ‘Home to Gate’ initiative is part of Fraport’s ‘Great to have you here!’ service programme, which also saw the recent introduction of free WiFi across Frankfurt Airport.

Budapest Airport offers security queue jump vouchers

Travellers who wish to skip the queues at airport security now have the option of doing so at Budapest Airport, following the installation of Fast Track voucher vending machines in Terminals 2A and 2B.

The vending machines have been installed near the entrances to the security search zones. A voucher, which grants access to the Fast Track Lane, can be purchased for €5. The queue jump service, which can help improve the airport experience while simultaneously adding another welcome revenue source, was previously available to first and business class travellers only.

Manel Moreno, Head of Commercial Landside Services at Budapest Airport, said the initiative contributes to the airport’s strategy to reach the “highest western European service levels”.

The Fast Track voucher vending machines have been installed in Terminals 2A and 2B at Budapest Airport.
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INNOVATION SHOWCASE

Airport Business

WiFi based passenger tracking at HEL

A new WiFi-based system at Helsinki Airport allows passengers to be tracked throughout every step of the airport process via their smartphones, and is expected to bring about benefits relating to queue management, resource allocation and retail. Finavia, operator of the Finnish capital city’s airport, has teamed up with fellow Finnish company Walkbase, which has installed sensors across the airport site, from the car parks to the departure gates.

Up to 300 tracking devices will be installed across the airport in total, each of which can pick up the WiFi signal from smartphones and use Bluetooth Low Energy (BLE) technology to locate and push notifications to Bluetooth-enabled personal electronic devices, could also be installed in the near future.

As well as allowing Finavia to identify bottlenecks at checkpoints, concessionaires are able to push notifications to passengers when they are in the retail area, as long as the smartphone owner has opted in. Offering directions around the terminal via push notifications has also been highlighted as another potential application for the technology.

The specific location of the smartphone’s owner. Importantly, none of the passengers’ personal data is stored. While WiFi sensors have been installed initially, Finavia has suggested that beacons, which use Bluetooth Low Energy (BLE) technology to locate and push notifications to Bluetooth-enabled personal electronic devices, could also be installed in the future.

Oslo Airport offers interactive wayfinding and dedicated work zone

Navigating the terminal at Oslo Airport or finding a quiet space to work should now be a lot easier following the installation of interactive information screens and a new work zone. Six 46-inch touch-screen displays have been installed across the domestic and international departures and arrivals halls. Travellers can scan their boarding pass to get directions to their departure gate, while they can also view estimated queuing times at the security and immigration checkpoints. The displays can also be used to find information on other facilities in the airport, including retail and F&B outlets.

Elsewhere in the airport, in response to demand from travellers who frequently fly from Oslo, a work zone has been created in the international pier. The dedicated working area is equipped with high-sided chairs for increased privacy, plus desks and power sockets. Additional desks have also been added along the windows, so travellers can enjoy views of the airfield while they work.

iBeacons enable free access to digital books in Lounge Istanbul

Visitors to the Lounge Istanbul at Atatürk Airport can now use their personal electronic device to access a wide selection of reading material thanks to the roll out of iBeacons by Turkish Airlines. The iBeacons, which make use of Bluetooth Low Energy (BLE) technology, automatically trigger a message via the airline’s Sky Library app on travellers’ smartphones and tablets when they enter the lounge. Every visitor to the lounge receives an automatic message containing the WiFi password and a link to the Sky Library content. The user can then access a selection of books in the fields of management, brands, marketing and communications, as well as children’s books. In addition, Sky Library offers complimentary access to Turkish Airlines’ publications, such as the Skylife inflight magazine, and information on a variety of Lounge Istanbul amenities.

All travellers who visit Turkish Airlines’ Lounge Istanbul at Atatürk Airport can make the most of complimentary access to digital reading material.
Quintiq expertly solving planning puzzles

All businesses, large and small, have their own complex planning puzzles, and airports are no different. Quintiq, a leading software company, provides planning and optimisation solutions in a wide variety of sectors, including the aviation industry. The company’s COO Arjen Heeres outlined its progressive strategy to Ross Falconer.

The Quintiq story is one of rapid, successful growth. Beginning in 1997 with a group of five ambitious computer programmers, the company now boasts more than 800 employees in offices around the world. COO Arjen Heeres joined shortly after Quintiq was founded, and his own passion for solving planning puzzles echoes the company’s vision.

Central to this vision is the ability to solve each planning puzzle using a single supply chain planning and optimisation software platform. “We optimise and plan larger operations with multiple planning puzzles, each of which have some kind of interdependency,” Heeres commented. “The platform we provide is one where you can capture all those puzzles, identify where they all work in collaboration with each other, and find the best possible solution given the circumstances.”

Quintiq has recently been acquired by Dassault Systems, which will only strengthen its focus on the aviation business. Airports are a key market for Quintiq as it explores further growth. They are, of course, very dynamic environments, and the inherent flexibility of the Quintiq platform in responding to operational changes or disruption in real-time, makes it a vital technology for airports.

Arjen Heeres, Quintiq COO: “We can strategically help airports determine at what level they should invest in new infrastructure, for example. We can also assist on a practical level with capacity planning and staff rostering, while on an operational level, we can help minimise the effects of last minute disruptions in real-time.”

Copenhagen Airports, operator of the busiest hub in the Nordic region, is using Quintiq’s software platform to plan its workforce. Copenhagen Airport handled a record 24.1 million passengers last year, and Quintiq has provided a single integrated software platform to optimise the planning of the airport’s workforce of 2,100 staff. Its software implementation also includes the deployment of a mobile application, integration with SAP Payroll, and the automation of key planning tasks.

Enormous benefits of optimisation

Quintiq also works with airlines and air navigation service providers (ANSPs). Indeed, it was recently announced that KLM Royal Dutch Airlines has rolled out its software platform to optimise its workforce planning strategies for pilot management. Meanwhile, Quintiq works with some of the world’s biggest ANSPs, including Deutsche Flugsicherung, the FAA, and NAV Canada. Quintiq’s workforce planning and optimisation solution enables ANSPs to create plans that fully incorporate government legislation, labour agreements, and the latest fatigue risk management principles.

Heeres’ concluding sentiment was that optimisation is typically underestimated, but the benefits are tangible. “You need to be precise in capturing the operation of an airport. That requires quite some work, but my recommendation is look into it and really make the effort to understand why, if you put the effort in, the rewards can be enormous.”

Airports are a key market for Quintiq as it explores further growth. They are, of course, very dynamic environments, and the inherent flexibility of the Quintiq platform in responding to operational changes or disruption in real-time, makes it a vital technology for airports.
It is a great pleasure for Aéroports de Paris to host ACI Airport Exchange in Paris in November, bringing together air transport executives from across Europe and Asia Pacific. Since its launch in 2006, ACI Airport Exchange has established itself as the leading event at which ideas and knowledge are shared, and business relationships are formed. Following a very successful event in Doha last year, we at Aéroports de Paris are looking forward to helping take the event on to another level again.

The strategy of Aéroports de Paris is to become the European airport group setting the standard in terms of customer satisfaction, economic performance and sustainability, and we want this year’s event to reflect that throughout the 5 conference streams: Security & Border Control; Airport Operations; Airport Development & Environment; Facilitation, IT and Customer Service Conference; and the Digital Engagement Summit.

Much of Aéroports de Paris’ success is achieved through unique collaborations with our partners, who understand our drive to be a successful airport, which is responsive to the needs of its stakeholders and its desire to be “best in class” at all levels. This year’s ACI Airport Exchange, which we are very proud to host, provides the perfect forum for us to champion the “best in class” experiences and strategies of a responsive airport, as well as the products and services available to achieve that.

I would like to encourage all Aéroports de Paris partners to attend ACI Airport Exchange, whether as a delegate, sponsor, exhibitor, or exhibition visitor, to benefit from the myriad networking and learning opportunities on offer, as I am sure the event can play a key role in ensuring all of us maintain our progressive approaches and solution offers.

Airports have to invest and plan for the long-term. Inspired by each other, we can find the right response to the challenges we are facing. Aéroports de Paris plans to stage a memorable social programme to complement the exciting plans ACI EUROPE and ACI Asia-Pacific have for the conference and exhibition.

We look forward to welcoming you to Paris for the most significant air transport meeting of 2014.

Augustin de Romanet
Chairman & CEO, Aéroports de Paris
n the world of technology, these are exciting times. The pace and scale at which innovation is changing consumer behaviour has arguably never been so swift, and in our own industry the implementation of leading-edge technologies is transforming the workings of airports worldwide. Samsung has consistently been at the vanguard of development in both consumer and business technology, and as such is aptly placed to guide our global gateways in the fast-changing landscape of consumer engagement. Samsung Electronics’ Head of European Industry Strategy: Retail, Media & Consumer Goods Vincent Slevin has some pertinent advice to offer to airports and their retailers.

His role involves collaborating with leading companies to enhance the end-to-end customer experience and build long-term competitive advantage. In conversation with Airport Business, he commented that “technology has fundamentally transformed the way in which consumers interact with businesses and brands.”

Slevin added that the rapid adoption of technology such as smartphones means that we have become increasingly used to living in a world where information is available anywhere at anytime, and where communication is personalised to our preferences. Our expectations as travellers are being set by this new world of mobility and connectivity, and it is important therefore that the services we receive when travelling keep up to these expectations. “Customers now have myriad platforms and touch-points through which to engage with businesses – from the Twitter handle to the customer service line, to the online live chat functionality, to the mobile app – and while this requires greater resources, this multi-channel approach also offers tremendous opportunity,” he said.

As commercial factors become an ever more dominant part of the airport journey, the possibilities to revolutionise retail for passengers, Slevin explained, are abundant. In an airport environment, as on the high street, retail stores that embrace a multi-channel strategy and leverage digital technology will be the ones with the most opportunity for growth. “The consistent footfall within airports offers a captive market, but the environment can be every bit as challenging as a high street in terms of actually capturing customers’ attention,” he stated. “Technology can play a game-changing role in this regard but only if retailers are willing to embrace the possibilities and implement initiatives that anticipate changing customer preferences.” Technology has been identified by many retailers as the main enabler of the retail experience of the future. Innovations such as digital signage can help stores attract customers into their premises, while interactive displays and kiosks provide customers with a compelling way to research products and services. But, with the vast majority of airport-passenger correspondence now taking place online, the retail experience can start before a traveller has even set foot in a terminal, Slevin continued, as airports and retailers begin to follow the example of “pure play” online companies, which use big data to create a more targeted and personalised customer experience than ever before.

Within the airport itself, streamlining passenger processes so that dwell times are maximised is also key to enhancing the retail experience for passengers. “The very best technology typically simplifies and streamlines a process, an action or an experience. Air travel has become increasingly associated with anxiety and stress, owing largely to increased security measures and faster flight turnaround times. Airlines have sought to eradicate some of these associated time pressures with simple initiatives such as mobile apps that allow you to check-in and board flights using barcodes. But this is the tip of the iceberg in terms of what can be achieved,” Slevin established. “For
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