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Interview: Kevin Toland, Chief Executive, DAA
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Aligning regulation & market reality

By Olivier Jankovec, Director General, ACI EUROPE

2014 is off to a pretty good start with more than 80% of Europe’s airports registering passenger growth – our best performance in more than 2 years. Freight traffic also appears to be surging back, and with IATA pointing to improved economic conditions for airlines, there is scope for more capacity growth in the months ahead.

All good news, even though downside risks are still there – from a rather weak economic recovery to geopolitical tensions across the Mediterranean and with Russia. What’s more, many airlines in Europe are going through painful structural adjustment processes, adding significant business uncertainty and volatility for airports.

So it was fitting that the European Commission finally clarified the rules of public financing in February, when it adopted its Guidelines on State Aid for aviation. These new rules are to be welcomed, not least because the Commission has come a long way from its initial thinking. Our unique contribution to economic development, job creation and social cohesion is recognised – as is the fact that small regional airports are structurally unable to stand on their feet. The Commission thus accepts the need for some form of financial support and also leaves the door open to the public financing of very large airport infrastructure. Finally, it has come up with much simplified rules for start-up aid given to airlines.

These are significant achievements for ACI EUROPE, as we successfully teamed up with the Assembly of European Regions (AER) and mobilised more than 50 Members of the European Parliament in support of our position.

Some of these rules will be reconsidered in 5 years’ time – so this is not the end game. But for now, the new Guidelines are striking a balance between protecting connectivity and strengthening the industry’s level playing field. Indeed, the European Commission fully acknowledges that airport competition is a reality – we cannot agree more.

Two years ago, ACI EUROPE commissioned an in-depth study into the matter, providing for the first time empirical evidence of the – significant – extent of competition between airports. This study sparked quite a debate, prompting IATA to produce its own report on airport competition. At our 6th ACI Economics and Finance Conference that took place in London in March, we moved the debate further. ACI EUROPE released a new analysis paper which looks at how regulation could better reflect growing airport competition.

This is about accepting the logic that where there is significant competition, there is no need to regulate. In situations where regulation is still needed, it should avoid disincentivising airports and airlines from finding common ground and entering into commercial contracts, just like in any other business. Aligning regulation with market reality is likely to take some more time, but it is an essential part of the normalisation of our industry. The UK and Denmark have partially moved into that direction, although we are still far from the even more flexible approach that aviation regulators are following in Australia and New Zealand.

In the coming months, we will be working on a new Economic Impact study for the airport industry, as well as on a new way of measuring and ranking the connectivity offered by each European airport. This is part of our on-going efforts to raise the societal profile of our industry – no small feat given what is at stake with (or without) airport development for Europe. Expect more about that at our Annual Congress & General Assembly next June in Frankfurt.

In the meantime, our Airport Trading Conference is about to kick off in Zurich followed by our Regional Airports Conference & Exhibition in Madeira in May. This issue of Airport Business features a fresh new look and several new features. It also brings you up to speed with some of the latest developments in travel retail, airport operations and the passenger experience. It also puts the spotlight on Kevin Toland, the CEO of DAA in Ireland. Kevin is part of a new breed of airport managers who are bringing fresh thinking and experience from other consumer-focused industries – yet another sign of airports’ transformation from B to B to B to C.
Airports in the news

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

Heathrow Airport

If Heathrow continues its current 4% growth rate, it will break 75 million annual passengers in 2014.

Heathrow will become the first airport in the world to introduce a new traffic management system for handling arriving aircraft – using the amount of time between flights, rather than distance. The new system is expected to halve delays caused as a result of strong head winds by landing arriving flights closer together. It says the procedure could cut disruption for passengers by more than 1,300 hours each year when introduced in spring 2015.

Brussels Airport

Brussels Airport has averaged 3% over the past six months (August 2013-January 2014).

Brussels Airport will have ten new routes in its network in Summer 2014, increasing the total number of destinations to 206, and three new airlines. The long haul network offers 41 destinations that are served by 175 weekly flights and 13 airlines. The short haul network (Europe, Mediterranean) offers 158 destinations. New destinations in 2014 are London Gatwick (easyJet), Santiago de Compostela (Vueling) and Thessaloniki (Aegean Airlines).

Oporto Airport

Oporto Airport averaged 10% growth in the last quarter (November 2013-January 2014).

Oporto’s Sá Carneiro Airport has been chosen by ACI ASQ (the Airport Service Quality programme) as the third best airport in Europe, following Moscow Sheremetyevo (Russia), which took first place, and Zurich (Switzerland), in second. From 2006 to 2011 the Francisco Sá Carneiro Airport was consecutively ranked among Europe’s top three best airports, having reached the top spot in 2007.

Budapest Airport

Budapest Airport averaged 7% growth in January and February 2014.

Budapest Airport announced that it has recorded its best start to a calendar year in over a decade. The announcement follows a 7% upturn in traffic in the first seven weeks of 2014, meaning that 650,450 passengers have passed through the gateway to date.

Oslo Airport

At current growth rates, Oslo Airport should exceed 23 million annual passengers in 2014.

After breaking ground in 2011, construction of Oslo Gardermoen Airport’s new departures and arrivals hall, railway station and pier reached the halfway mark in late February. When the expansion project is completed in April 2017, the Norwegian gateway’s theoretical passenger capacity will rise from 23 to 28 million passengers per annum.
Frankfurt Airport

Frankfurt Airport has achieved traffic growth in each of the last six months (August 2013-January 2014).

Fraport AG’s new Frankfurt Airport App 2.0 features a completely redesigned look and expanded content. In addition to German and English versions, the new FRA Airport App is also available in a Chinese (Mandarin) version. The new FRA Airport App 2.0 is an initiative of Fraport’s comprehensive “Great to Have You Here!” quality service programme. The goal of this programme is to enhance services to improve the travel experience of passengers who are departing and transferring at Germany’s largest airport.

Rome Fiumicino Airport

Following negative figures for 10 out of 12 months in 2013, Rome Fiumicino has grown in each of the last two months (December 2013 and January 2014).

Rome airports operator ADR and Italy’s air navigation service provider ENAV have launched A-CDM (Airport Collaborative Decision Making) procedures at Leonardo da Vinci airport in Rome Fiumicino. With the adoption of the A-CDM platform, Italy’s main airport can now send information on the state of all departing flights to the Network Management Operations Centre at EUROCONTROL, which will sort and send on to the other connected airports, thus significantly optimising overall operations.

Athens Airport

Athens Airport recorded 7% passenger growth in January – the best figures it has achieved over the past 12 months.

Athens International Airport (AIA) has successfully upgraded to Level 3 of the Airport Carbon Accreditation programme. AIA’s main emission reduction initiatives include reduction in electricity consumption by nine million kilowatt hours between 2005 and 2012, and the construction and operation of an 8.05MWp Photovoltaic Park, the largest unified PV installation at an airport in the world.

Pulkovo Airport

Pulkovo Airport achieved 16% growth in January.

Russian authorities have approved the new Terminal 1 for Saint Petersburg Pulkovo International Airport, providing it meets all technical requirements. Terminal 1 officially opened on 4 December 2013 after a two-month testing programme. The airport had already announced that from 1 February several Russian carriers – including S7 Airlines, UTair, Transaero, and OrenAir – will transfer all domestic flights to the newly-opened terminal.

Lyon-Saint Exupéry Airport

Lyon-Saint Exupéry has achieved traffic growth in four out of the last six months (August 2013-January 2014).

Lyon-Saint Exupéry Airport has unveiled its brand-new Welcome Zone, a 165sqm, open-plan area designed for a sole purpose: to welcome travellers to the Rhône-Alpes region and showcase all that it has to offer them. Expert advisors and innovative multimedia provide tourists with all the information they could need on the local area, transport links, and airport services. Open from 06:00 until 23:00, with an additional 24-hour interactive information point, the Welcome Zone is divided into three key areas: the Tourism & Airport zone, the Lounge space, and the Transport zone.
PUTTING MADEIRA ON THE MAP FOR 50 YEARS

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By Paul Hogan in Dublin

“No, I am not satisfied!” I had just asked the DAA CEO if he is happy with the 2013 traffic figures reported at the Dublin and Cork airports operator. If Dublin Airport repeats last year’s growth of 6% it will have 21.4m passengers in 2014 – the target in the 2010-14 corporate plan, which Toland inherited, requires 22m by 2014. The small shortfall does not seem substantial based on how long ago that target was set, and especially given the fact that it spanned an unprecedented deep recession heralded by the arrival of IMF inspectors in Dublin in the very same week that its new Terminal 2 opened in November 2010. It is towards that same terminal that we are now heading – Toland’s staff had set aside a room in the VIP suite for our interview, but we conduct most of our discussion on a powerwalk around the DUB premises.

“We’ll have to walk and talk as we’re especially busy today,” explained Toland. On the day of the interview, the centre-right European People’s Party congress is also meeting in Dublin hosted by Ireland’s Prime Minister, Enda Kenny. Ordinarily, such a gathering would probably pass as a mere formality, but the Crimean crisis and the presence of several heads of government, including Germany’s Chancellor Merkel, conspire to raise the convention’s profile considerably. The airport must go about its business with the clutter of armed police, and media satellite trucks. Toland chats easily with a Garda officer who lets us through the tight cordon, and we resume our discussion as we march along.

“I want us to do better. We’re obviously not where we planned to be seven or eight years ago, but we now have a clear strategy and a set of goals appropriate to our circumstances – in Dublin the near term objective is 25 million passengers by end-2017.”

Kevin Toland (47) became Chief Executive of DAA, the Dublin and Cork airport operator, in January 2013 after spending a quarter-century in consumer foods – the last decade as the CEO of Glanbia USA, a dominating force in the manufacture and supply of processed products in the giant North American foods industry. Previously, Toland held senior executive positions in Coca-Cola Russia and with Grand Metropolitan in Ireland and Central Europe.

DAA is his first job in air transport.
measures. But we now have a clear strategy and a set of goals appropriate to our circumstances – in Dublin the near term objective is 25 million passengers by end-2017.” (Dublin’s best-ever year was 23.4 million in 2008, last year’s traffic result of 20.2 million is comparable to 2006.) “Ireland has been in a very deep recession and is only just emerging – the goal must be to outperform the market – to outpace GDP. We have very good indicators of achieving this – especially the double-digit growth on the North Atlantic, combined with a 35% improvement in transfer traffic last year. These are solid signs that a secondary hub is emerging. Our two largest customers, Aer Lingus and Ryanair, are growing, and we’re seeing positivity across our customer base.

“Very strong commitments from the airline industry”
Ryanair’s latest good news came with some fanfare in November with Toland sitting alongside the Irish Prime Minister and the Ryanair CEO to announce that the airline would be adding nine new routes in summer 2014, as well as increasing frequencies to a further eight destinations, raising its passenger numbers at Dublin by almost 10% to an estimated 7.55 million in 2013/14 and to 8.25 million in 2014/15. Indeed, after all the difficult years, Toland reports “Dublin has had very strong commitments from the airline industry this year.” This includes Emirates’ services to Dubai which have been doubled to twice daily; while frequencies to Elihad’s and Turkish Airlines’ competing hubs also become twice daily this summer, providing considerable choice over the airport’s historical reliance on Heathrow for Asian services. “This is stimulating the entire market at no cost to any player – indeed our traffic over London Heathrow is bigger than ever,” says Toland. However, the really good news comes in the form of the airport’s development into a North Atlantic “secondary hub” which sees Aer Lingus launching two additional new daily services in April – to San Francisco and Toronto, which will be joined by the arrival of WestJet’s landmark daily service via St John’s in June.

“WestJet had some very competitive choice of where it could have made its first landfall in Europe. But they chose Dublin. They tell me that they have experienced their largest-ever booking of a pre-launch service. Together with Aer Lingus’s new Toronto services, as Canada continues to thrive and the Irish economy recovers, I can see that many Canadians are going to come, demand is going to rise, and we are going to need services to the Canadian west coast too.”

The Canadian low cost carrier will, exceptionally, be using 737 narrowbody equipment – building on the significant developments pioneered by Aer Lingus which is “pathfinding” its Toronto route using leased 757s – much smaller than its existing A330s. Separately, Aer Lingus told Airport Business that it may even develop more North Atlantic routes in the 170-200 seat sector. An order for up to 40 narrowbodies is to be announced over the next two years, possibly

“Ireland is emerging from a very deep recession and our two largest customers, Aer Lingus and Ryanair, are growing – Dublin has had very strong commitments from the airline industry this year.” Last November Toland sat alongside the Irish Prime Minister and the Ryanair CEO to announce that the airline would be adding nine new routes in summer 2014.
including transatlantic-capable A321neos. Meanwhile, a further east coast gateway and more services to Florida have been dangled by Aer Lingus as the next phase of its Atlantic ambitions.

“Developing a real working secondary transatlantic hub”

“Dublin is not Heathrow or Amsterdam, but what we are building here is a real working secondary transatlantic hub in which people are already directly connecting from some 70 points across Europe, and self-connecting by many more. For these purposes Dublin has the benefits of geography – and the unique advantage of preclearance by United States Customs and Border Protection (CBP), which is now comprehensively used by Aer Lingus and other airlines. In practice this means Aer Lingus flights now go straight to the domestic terminal at JFK where they mesh with JetBlue – the airline has a similar arrangement with United at Chicago offering genuine MCTs of as little as 45 minutes – hubbing in Dublin therefore has far more than just cost advantage.”

To encourage yet more airline business, DAA introduced its Growth Incentive Scheme in 2011, paying a rebate to airlines that increase passenger numbers. €5.6 million was rebated in 2013, the third year of the scheme, and it was recently extended for a further three years to 2016. So far €8.6 million in total has been rebated under the scheme. A figure approaching €10 million is a lot of money to DAA, but is it really significant when spread around Dublin’s airline partners given the scale of their investment? Toland thinks it is, and vigorously defends the effectiveness of the scheme: “Oh it definitely works. 5-6% traffic growth is mathematical proof it does, and the growth is in both directions. And if this trend is maintained, travel is going to double again in 10-15 years, especially as a lot people in Asia begin travelling for the first time.”

Having seen both Ireland’s economy and Dublin Airport overheat in the first decade of the 21st century, Toland says that the return to growth will be on stronger foundations this time. “Take the example of Aer Lingus’s re-establishment of a route to San Francisco. This originally failed because it was wholly dependent on discretionary tourism that evaporated when the stagnation arrived, and nobody could afford to vacation in Napa Valley anymore. This time the route has a multi-national base – top IT companies such as Microsoft, Google and Yahoo have all set down deep roots in Ireland.”

Furthermore, Toland is cautious about when the return to growth will see a move back to the kind of significant investment which delivered the €600 million new terminal, or when the planned third runway will be built. “We’ll make sure we’re efficient, but it’s not binary to invest heavily in expansion. Although we do plan to re-appraise the need for a third runway, that won’t be until after 2019.”

New international ambitions

In the meantime, while Terminal 2 matures into its role, it has started to pay another dividend with Toland firmly behind the launch last summer of daa International. “This is an entirely new business unit, building upon, but very different from Aer Rianta International’s retail focus over the past 25 years. daa International takes advantage of a number of things – our ability to run airports in Dublin and Cork, our considerable reputation for partnership in many different geographies in retail through ARI, and now our considerable new capability in building and finishing Terminal 2.”

Toland on daa International: “This takes advantage of our ability to run airports in Dublin and Cork, our considerable reputation for partnership in many different geographies in retail through ARI, and now our considerable new capability in building and finishing Terminal 2.”

The route to transforming Cork’s fortunes

In the meantime, a key focus and responsibility for Toland is much closer to home: Unlocking the value of Cork Airport – the other core airport business in the DAA group. “Cork Airport was ranked as the world’s best regional airport for customer service by both business and leisure travellers in the ACI Airport Service Quality (ASQ) Regional survey last summer. This was deserved as we think the new terminal represents one of the best regional airport buildings in the world. The simple fact of the matter is that the Irish recession has been severe. However, while the position in Cork is down by some 20% since its peak, it could easily have been 30%. Cork’s tourism potential
is tremendously strong with a hinterland which extends to Kerry and Tipperary – only 30% of traffic is inbound, so frankly we have to hold our nerve and build up the business.”

Ironically, while improved road connections have made a major contribution to Dublin’s improvements, with Northern Ireland-originating traffic up 15% last year, the same effect has impacted Cork, weakening the viability of domestic air services to the capital which is now currently unserved. Indeed Toland agrees: “What Cork needs more than anything is a Dublin route which will strategically connect it to the emerging secondary hub.” Toland and his team are meanwhile working hard to find an airline partner. “This route will do more than almost anything we can do to transform Cork’s fortunes.”

Despite coming to DAA after a quarter of a century in fast-moving consumer goods, where intense competition and extreme low costs and prices are core, Toland says he did not find airports to be a totally alien corporate environment. “Until I actually worked for this airport company I spent up to 160 nights a year away from home. Working in consumer foods I’ve visited more of the world’s airports as a real consumer than many others who consider themselves to be life-long airport experts. Of course I’ve had fast track learning about all sorts of airport processes, but in airports, and in all businesses, it’s all about being 100%. Just like in consumer foods, our product is the passengers’ first point of goodbye and hello – everyone in the entire team has a role and contribution to make, and we’ll all fall or rise with the weakest and strongest performers. All businesses have customers, we all have shareholders, and they’ve all got to be satisfied.”

Indeed Toland recognises, but also rejects, the sentiment that air transport and airports should be considered to be fundamentally different businesses than any other because of the responsibility held for operating key and dominating infrastructure. “There’s a lot of self-perception that aviation is somehow special, but that doesn’t help with competitiveness. After all, there’s a lot of compliance and regulation in foods too – the requirements for food safety, traceability etc have gone wild in recent years. While it’s a fact that there are some very important distinctions – after all, our customers can’t swap their choice of airports in quite the same way they can select breakfast cereals – on the other hand it doesn’t matter what brands and infrastructure you have, if you are not always at your best, you are soon going to find yourself uninvited in the marketplace. There is no captive customer, in either mass consumer brands or airports, and it is very dangerous to believe there is.”

DUBLIN - NEW ROUTES

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DUBLIN - Significant capacity increases (between March and August)

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CORK - NEW ROUTES

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Unlocking the value of Cork Airport – ranked as the world’s best regional airport for customer service in the ACI Airport Service Quality (ASQ) Regional survey last year. “What Cork needs more than anything is a Dublin route which will strategically connect it to the emerging secondary hub.”

DAA INTERVIEW

NEW 2014 ROUTES AND SIGNIFICANT FREQUENCIES

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Join us at the ACI Europe Annual Congress, 16 – 18 June 2014 in Frankfurt!
After a two-year review, in February the European Commission adopted its new guidelines on State aid to airports and airlines. Europe’s airports have cautiously welcomed the clarity provided by the guidelines, while expressing concern about their medium-term impact on regional airports and connectivity. Here, Airport Business summarises the new rules and what they mean for airports. Report by Ross Falconer.

Europe’s airports cautiously welcome new State aid rules

The announcement of the new guidelines on State aid to airports and airlines had been hotly anticipated since the public consultation on the new proposals concluded last September.

As previously reported in Airport Business, the issue of State aid, particularly in the aviation sector, is both complex and contentious. The new guidelines replace those introduced in 2005, which were widely deemed to be inadequately enforced. Significant market change has also occurred in the past decade, not least the exponential growth of low cost carriers, which has allowed regional airports to develop dynamically. However, some of these smaller airports are exposed to harsh economic realities in a highly competitive environment. The figures are compelling – 73% of airports handling fewer than one million passengers, and 55% of those handling less than five million, are loss-making. Such airports have high per unit costs, structural disadvantage in generating non-aeronautical revenues and non-existent pricing power vis-à-vis the airlines. But as these airports constitute vital public transport infrastructure – essential for fostering economic and social development, connectivity and accessibility – clearer rules to facilitate such airports have been long overdue to enable airports to receive state support, where genuinely needed. ACI EUROPE has been active in driving the debate, engaging constructively with political leaders and European Commission (EC) officials throughout the review process, including Joaquín Almunia, Commission Vice-President in charge of competition policy, who was responsible for steering the new guidelines. ACI EUROPE’s own analysis paper – Airports & State Aid: how to protect both Growth & Competition – was released last August in response to the public consultation. While ACI EUROPE has also reached out to wider stakeholders, partnering with the Assembly of European Regions (AER) – the largest independent network of regions in wider Europe. Meanwhile, last September ACI EUROPE held a joint hearing on the issue in the European Parliament, in cooperation with Union des Aéroports Français.

Commenting on the new guidelines, Commissioner Almunia maintained that the new guidelines are a key ingredient for a successful and competitive European aviation industry. “They will ensure fair competition regardless of the business model – from flag carriers to low-cost airlines and from regional airports to major hubs.”

Joaquin Almunia, Commission Vice-President in charge of competition policy, maintained that the new guidelines are a key ingredient for a successful and competitive European aviation industry. “They will ensure fair competition regardless of the business model – from flag carriers to low-cost airlines and from regional airports to major hubs.”
they are a key ingredient for a successful and competitive European aviation industry. “They will ensure fair competition regardless of the business model – from flag carriers to low cost airlines and from regional airports to major hubs,” he said. “Our aim is to ensure the mobility of citizens, while preserving a level playing field between airports and airlines.”

So, what do the new rules mean for airports?

The guidelines focus on three key areas: Investment in airport infrastructure, operating aid to regional airports, and start-up aid to airlines.

The new framework on funding for airport development and modernisation is based on decreasing aid intensity as air traffic grows. ACI EUROPE has expressed its support for this approach. But while the EC has recognised the unique social value of airports, a key issue is also the looming airport capacity crunch: EUROCONTROL’s figures are unequivocal and cannot be ignored – 12% of demand will be unaccommodated by 2035 because of insufficient airport capacity, meaning 240 million would-be passengers will be unable to fly. This will cost Europe’s airports and airlines an annual €40 billion in lost revenues. Fortunately, improvements to the initial EC proposals mean that airports handling 3-5 million passengers will now have greater investment opportunities than originally allowed.

Importantly, the possibility also exists for some public support for large greenfield projects, which is crucial if Europe is to maintain its global competitiveness – especially as the competing Middle East economies continue to make huge investments in both their airlines and airport hubs.

“One must not forget the fundamental purpose of Europe, which is to facilitate the free movement of citizens,” commented Thomas Jvin, Director of La Rochelle Airport and President of Alfa-ACI (French speaking airports). “Therefore the main issue for the coming years lies in the lack of airport capacity, which we must address in order to avoid Europe being disadvantaged compared to other parts of the world.”

Operating aid to regional airports

The most contentious element of the EC’s initial proposals was that, following a 10-year transitional period, airports with an annual throughput exceeding 200,000 passengers would no longer be able to receive public operating aid. This has been reconsidered and the guidelines now include a special regime for airports handling up to 700,000 passengers, although the EC has stopped short of providing long-term certainty for regional airports and their communities by indicating that this regime will be reassessed after five years.

Jankovec asserted that the structural and financial challenges that regional airports face today will remain in 2019 and are indeed likely to intensify. “We already know that regulatory-induced costs are going to increase for airports, while newly permitted levels of operating aid will stand at just 80% of current operating funding gaps,” he said. “When the decision-time comes around again, we will simply not be in a position to get this wrong otherwise some airports, in the worst case scenario, could be at risk of closure.”

Start-up aid for new routes

Perhaps the area that has generated the most media attention has been start-up aid to incentivise airlines to introduce new routes to regional airports. This assistance will continue to be permitted, provided it remains limited in length of time, and ACI EUROPE has commended the thought and focus given to this aspect of the regulation of start-up aid. “However, the implementation and enforcement of these new rules will ultimately determine whether clarity and simplicity have been achieved,” explained Jankovec. “With this in mind, we eagerly await the precedents set by forthcoming decisions on individual cases.”

The formal adoption and publication of the new guidelines in the Official Journal of the European Union is expected by the end of March, and Europe’s airports will wait with interest to see how they are implemented.

Florian Guillermet appointed Executive Director of the SESAR Joint Undertaking

Florian Guillermet, formerly Deputy Executive Director of the SJU, has been selected as the new Executive Director of the SESAR Joint Undertaking. Florian joined the SJU in June 2008, where he was responsible for the definition and execution of the SESAR Programme while serving as the Chief Programme Officer and the Deputy Executive Director, Operations and Programme. Previously, Florian has worked in the field of civil aviation for over 15 years. His vast aviation experience includes positions at the flight planning department of Air France, at the French Air Navigation Service Provider – DSNA – and at the European Central Flow Management Unit at EUROCONTROL.

Commenting on the new appointment, Matthias Ruete, Chairman of the Administrative Board of SESAR and Director-General for Mobility and Transport (DG MOVE) at the European Commission, said “Florian is a proven leader with strong technical skills, business acumen and the ability to bring people together. We believe that his extensive experience and clear vision of the required R&D process to modernise Europe’s ATM is exactly what SESAR needs as it moves to the next level of ambition.”

Looking to the future of the aviation sector and of the airport industry in particular, Florian Guillermet believes that “SESAR is building the bridge between the old way of doing things and the future of ATM. Airports are key in this process, which is why we are delighted to have such strong support and involvement from ACI EUROPE, as well as so many airports. This team spirit is the motor that drives the operational and technological changes that SESAR is developing. Together, we are delivering ATM solutions that will ensure greater operational ATM efficiency and smoother, sustainable air travel for all.”
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Restrictions on the carriage of LAGs (liquids, aerosols and gels) redefined the whole airport security experience when they were hurriedly introduced in 2006. Time and again continuing security concerns have delayed relaxation of the rules, most recently the April 2013 deadline for the removal of all restrictions was replaced with a new roadmap and a phased approach designed to ensure operational feasibility while maintaining the desired high levels of security.

The new LAGs regime introduced on 31 January is therefore a very important first step, and represents the result of hard-won cooperation between industry stakeholders, including ACI EUROPE, the European Commission, national authorities and other international partners.

It is also estimated that Europe’s airports have invested over €150 million to accommodate the new rules, and ACI EUROPE, in collaboration with other industry stakeholders, has produced advice to passengers clearly defining what the new rules mean.

“This is part of our investment toward getting back to the good old days before 2006, when there were no restrictions,” commented Olivier Jankovec, Director General, ACI EUROPE. “We are committed to reaching that ambitious end goal. This will require further advancements in screening technology, in terms of security, operational feasibility and passenger facilitation. It’s only by taking all these into account that we will remove the hassle out of this aspect of air travel.”

The new first phase involves a limited range of liquids. The most visible change is for transferring passengers, who no longer have to surrender their duty free purchases from non-EU airports. Enhanced technology is used to screen duty free LAGs purchases over 100ml, which must be presented in Security Tamper Evident Bags (STEBs) and with proof of purchase. Liquids needed for medical purposes or special dietary requirements, including baby food, are also allowed.

It is also worth noting that the new rules have been adopted in coordination with major EU trading partners, which have introduced equivalent rules, including the US, Canada and Australia. This means that EU passengers are able to carry their LAGs in STEBs when transferring in those countries.

The confiscation of duty free LAGs has had a serious detrimental impact, creating uncertainty for passengers unsure what they can carry onboard, and seriously impacting sales of liquor and cosmetics.

The European Travel Retail Confederation (ETRC) has been deeply involved in the LAGs issue since it first began, ensuring there is an effective and secure regime that also takes into account the concerns and needs of travel retail.

“The current change to the rules could not have taken place without close cooperation between all the many stakeholders involved and ETRC has worked alongside all of them, particularly ACI EUROPE,” explained Frank O’Connell, Vice President and Strategic Advisor, ETRC. “This has been recognised by the European Commission and by the Transportation Security Administration (TSA).”

The ETRC has encouraged a “soft launch” approach to this first phase in order to allow the new regime time to “bed down” and airport security personnel to gain confidence in the changed systems. “As passengers and airports become more at ease with the new regime, ETRC expects that this will bring
new opportunities for travel retailers everywhere and lead, in time, to a recovery in sales," added O’Connell.

Collaborative efforts by the European Commission, TSA and industry stakeholders, including ACI EUROPE, will continue with the aim of finding a comprehensive solution for identifying liquid threats that facilitates the full lifting of LAGs restrictions, while maintaining security.

Marjeta Jager, Director of Security for the Directorate-General for Transport and Mobility of the European Commission, told Airport Business: “We are very pleased that the first phase of lifting the restrictions on liquids introduced on 31 January at EU airports has been a full success from an operational point of view. We congratulate ACI EUROPE and all airports for their excellent work that allowed the implementation of this phase, and we are looking forward to continuing our cooperation with stakeholders and international partners on all security issues.”

The European Commission has appointed consultants to monitor and assess the impact of phase one of the new regime, with a view to moving on to the next stage of the journey towards the full lifting of restrictions, when operationally feasible, while ensuring that high levels of security are maintained.
Insight100: low false alarm rates

In light of the first phase of new rules on LAGs (liquids, aerosols and gels), which entered into force on 31 January, many progressive European airports have deployed combinations of screening technology which meet both current requirements at low false alarm rates but also allow for expansion of capacity as further liquid restrictions are lifted.

Cobalt Light’s Insight100 is one such solution and has been deployed at many of Europe’s airports, as the airports procured new equipment in advance of the deadline.

SORs, the technology used by the Insight100, is said to give false alarm rates of significantly below 1% on non-metallic containers. Systems that are X-ray based or that use the electromagnetic properties of liquids have higher false alarm rates but can often screen metallic containers. Combinations allow all containers to be screened at very low false alarm rates. In trials at London Heathrow and Zurich airports, the Insight100 was part of combinations that had false alarm rates significantly below 1%.

“It is clear that in future more liquids will be screened, with restrictions eventually being removed completely. Using SORS in screening combinations helps enable the relaxation of liquids restrictions due to the extremely low false alarm rates that are achieved,” commented Ken Mann, VP Security Products, Cobalt Light Systems Ltd.

Powerful screening technology

The LS10 bottle liquid scanner, developed and produced by Battelle Memorial Institute for Sellex International, is a powerful screening technology that non-invasively scans LAGs (liquids, aerosols and gels) in almost any container. In addition to scanning plastic, glass, and paper, it is able to quickly interrogate a wide range of metal containers. The LS10 integrates the use of Radio Frequency (RF) and ultrasonic technology to detect threatflammables, acids, precursors and explosive liquids, aerosols and gels within sealed clear or opaque containers with extremely low false alarm rates. The LS10 has received one of the coveted R&D 100 Awards from R&D Magazine, which bestows the awards in recognition of the most significant scientific accomplishments for the year.

The LS10 has recently been endorsed by ECAC as a Type B, Standard 3 LEDS. The LS10 is deployed in numerous major international airports in Europe, North America and Australia. In addition to its technical capabilities, the LS10’s portability, robustness and consistent interrogation results were important factors driving its international sales.

Banish those baby bottle blues

The new generation Kromek Identifier BLS 1006 is a state-of-the-art liquid explosive bottle scanner designed to meet the high-traffic demands of the modern airport hub. With a scan time of around 10 seconds it is said to be quick and simple to use.

The Identifier also has a new look user interface; with its single button operation, operator training takes no time at all. Simply place the item to be scanned into the cradle, select and press the appropriate button to start the scan, and approximately 10 seconds later a ‘pass’ or ‘fail’ result appears on screen. One button push does all no matter what the container size or type – there is no additional operator decision-making required for partially filled or smaller containers.

The Identifier can be used as either a primary screen identifier or as an alarm resolution system, behind a Type C or another Type B system, to provide rapid and accurate results. The Identifier has been installed in EU airports in both modes. The scanner has no container limitations; it successfully scans all container shapes and types, including metal, foil packaging and Tetra Pak, as well as infant formula and baby foods. As the investigation is non-invasive, there are no other consumables required.

The Kromek Identifier is ECAC approved Type B standard 3 and is backed by a full training and service capability.

Finavia deploys OptoScreener for LEDs

Optosecurity received a significant order for its LED and Firearm Detection product, OptoScreener, from Finavia, as the airport operator prepared for phase one of the new rules on LAGs (liquids, aerosols and gels).

“Finavia Corporation, who are responsible for airports and the air navigation system for all of Finland, are a very safety and passenger oriented company, which aligns well with Optosecurity’s core capabilities and focus,” said Tim Mathews, COO of Optosecurity. “We are very pleased that they chose OptoScreener for this project and we are excited to work with their team and to continue to develop this relationship.”

Kari Nurmea, Systems Specialist at Finavia, added: “We feel that OptoScreener will be a key part of our security screening at the checkpoint as we move towards the partial lifting of the liquids ban. We want to be ready and OptoScreener will help us do that.”
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“We feel Optosecurity will be a key part of our security screening at the checkpoint as we move towards the partial lifting of the liquids ban. We want to be ready and Optosecurity will help us do that.”

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Airports call for EU-ASEAN open skies

The inaugural EU-ASEAN Aviation Summit was held in Singapore on 11-12 February, jointly organised by the European Commission and the Association of South East Asian Nations (ASEAN). Significantly, a Joint Declaration adopted at the conclusion of the event proposed negotiation of a comprehensive air transport agreement between the EU and ASEAN. Report by Ross Falconer.

In 2011, ACI EUROPE launched a campaign on aviation liberalisation with the release of an external relations paper – Expanding Europe’s Aviation Market - Prerequisite for Global Relevance. This urged the opening of negotiations with the EU’s main trading partners in emerging markets, including ASEAN. Air traffic between the EU and ASEAN has almost doubled over the past 15 years and, with a combined population of 1.1 billion (largely middle class) consumers, the EU-ASEAN air transport market is of increasing strategic importance. However, a significant and expanding share of market growth is being diverted through competing hubs – especially in the Middle East. It is clear that realising the potential for future direct air traffic development between the EU and ASEAN (and lessening the competitive advantage of the Middle East hubs) requires an open, liberalised air services agreement.

In this vein ACI EUROPE and ACI Asia-Pacific called for aviation negotiations to be initiated between the EU and ASEAN within a year, aimed at removing restrictions on air services, promoting the integration of the two regional single aviation markets, and seeking regulatory alignment on essential issues such as safety, security and competition. “Liberalising aviation between the EU and ASEAN is not just about normalisation – it is about upping our game in response to increasing competitive pressures from other regions,” said Jankovec. “We need to seize this opportunity for first-mover advantage before others reap the full benefit of unrestricted market access.”
Therefore Europe’s airports are fully behind the Commission’s efforts to open aviation markets with the EU’s main trading partners. Beyond our own positioning, experience shows that consumers are the biggest winners, and that there are other far-reaching benefits. For us as airports, it is about unleashing our potential to act as engines of economic growth for our communities — something not to be overlooked given the urgency of sustaining Europe’s economic recovery.

Unlocking that potential will be given a big boost by the creation of an ASEAN Single Aviation Market, planned by 2015, but requiring significant political will. With some similarities to the single aviation market successfully created by the EU over 20 years ago, cooperation between the EU and ASEAN will become of central importance as Asia Pacific grows to become the world’s leading air transport market with a projected share of some 40% by 2030. In this time EU-ASEAN travel itself is expected to grow by 5% each year. Patti Chau, Regional Director, ACI Asia-Pacific, commented: “The Asian market — one of the fastest growing in the world — remains relatively segmented and regulated, thus undermining the competitiveness of the air transport industry and economy in the long-term. In the face of globalisation and increasing competition, the opening of a dialogue between EU and ASEAN on a single aviation market is very much welcome.”

Leading the EU delegation, Siim Kallas, Commission VP (Transport), added: “If Europe works together with ASEAN, we can extend the proven benefits of our single aviation markets to make a much larger inter-regional one. The Summit has created much new momentum for closer cooperation and made a convincing case for embarking on what could be the first aviation agreement in the world between two important blocs of countries like the EU and ASEAN.”

Looking forward, the Commission needs a negotiating mandate from the Council of Transport Ministers, and Kallas announced at the Summit that he will indeed soon be seeking this authorisation to enable negotiation of a comprehensive EU-ASEAN air transport agreement. Meanwhile, reflecting the strong desire on both sides to strengthen aviation cooperation, an ASEAN-EU Aviation Working Group is to be established to discuss and monitor progress towards an agreement.
Industry and EU institutional stakeholders gather at the European Parliament

On 21 January, ACI EUROPE held its customary annual New Year Cocktail event in the European Parliament, co-hosted by Georges Bach MEP (Luxembourg). ACI EUROPE President, Arnaud Feist, gave a speech on the current outlook for the year ahead. More than 150 assembled guests were present, including representatives of the European Commission’s DG MOVE and DG Competition, as well as Members of the European Parliament and key people from EUROCONTROL and SESAR JU.
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The ACI Annual Airport Economics & Finance Conference & Exhibition, held in partnership by ACI EUROPE, ACI World and ACI Asia-Pacific, returned to London, following last year’s event in Singapore. The annual gathering was attended by 300 key industry stakeholders, among which were airport CEOs, CFOs, airport investors, financial institutions, and regulators.

The event took place at a time of cautious optimism, with economic growth returning to most regions. However, while there is optimism, challenges remain, with ongoing economic uncertainties in the EU and fiscal imbalances in the US. Emerging markets are also seeing a slowdown in economic growth.

While the conference covered a wide range of topics, the common thread was that of economic regulation and airport competition. With increasing competition a key feature of the airport industry, it was widely asserted that economic regulation should reflect the competitive pressures faced by individual airports. It was appropriate that the event took place in London, the UK Civil Aviation Authority (CAA) having recently announced that both London Heathrow and London Gatwick airports will continue to be economically regulated in the five-year period beginning on 1 April – a subject that was the source of much debate in the engaging conference sessions.

Meanwhile, ACI EUROPE launched a new analysis paper at the event, *Competition in the European Aviation Sector*, with the aim of progressing the debate on airport competition.

ACI EUROPE Director General Olivier Jankovec explained that 2013 was a year of recovery, with the Russian and Turkish markets performing very well, and the southern European markets still affected by the economic crisis. “All in all, it comes down to a two-speed market for Europe,” he said. In 2013, EU countries saw 1% growth and non-EU countries 9.6% growth. Jankovec was positive for the outlook for 2014, turning to macro-economics, he added. “We’re seeing the economic recovery in Europe gathering pace. The US economy is also performing increasingly better. Where there are concerns are the emerging markets, where we see a slowdown in economic growth.”

ACI World Director General Angela Gittens delivered a preview of the 2013 ACI Economics Report, which contains global indicators and analyses for over 680 airports, representing 70% of the world’s passenger traffic. Gittens explained that worldwide traffic increased by 4% in 2013, while global airport income in 2012 grew by 4.4% to reach US$117bn. “Aeronautical revenues alone are not enough. The move to revenue diversification has been key to the financial resilience of airports, with retail the leading source of non-aeronautical revenues,” she said.

Patti Chau, Regional Director, ACI Asia-Pacific, referred to the healthy growth of airports in the Asia-Pacific. Indeed, 9 of the world’s 20 busiest airports are located in the Asia-Pacific region. “No doubt, this is partly down to the growth of Asian LCCs, which account for over 50% of intra-Asian traffic,” she commented. Chau also referred to the recent inaugural EU-ASEAN Summit held in Singapore, and the fact that a single ASEAN aviation market is planned by 2015 – a development supported by ACI Asia-Pacific.

Dr Charles Schlumberger, Lead Air Transport Specialist at The World Bank, gave an energetic keynote address. He engaged the audience by presenting two different scenarios: the first that air transport will continue to grow and passenger traffic will double by 2030; the second, a more pessimistic view that economic data is misleading and that the global economy is not recovering while conventional oil production will soon decline, triggering a global energy crisis. He asked delegates to vote for which scenario they felt was most likely – the results were interesting, with 45% optimistic, 50% pessimistic, and 5% abstaining. That contrasted sharply with the results of a similar poll at last year’s event, when 79% had a positive outlook, 25% a negative outlook, and 2% abstained.
Declan Collier, CEO London City Airport, emphasised the increasing competition between airports for new business, as well as the competition that exists between modes of transport, particularly in Europe. He also referred to the fragile finances of Europe’s smaller airports – 51% of airports handling fewer than 3m annual passengers are loss-making. Collier also raised the subject of airline evolution. “We are seeing more mergers, bigger airlines changing their patterns of doing business, and LCCs evolving,” he said.

Tony Tyler, Director General & CEO, IATA, referred to a briefing paper that the airline trade association released last year on airport competition. That was in response to a study of Airport Competition in Europe published by Copenhagen Airports and Dr Harry Bush. Tyler said: “Our research shows there is still a need for robust, smart regulation, so that there are clear guidelines for airports.” He added: “Airports and airlines are always going to have differences, but we should focus on areas where we can work together.”

Kyran Hanks, Strategy & Regulation Director, explained that London Gatwick acknowledges that the UK Civil Aviation Authority has continued to accept its Contracts and Commitments framework as the best way forward to regulation. He said the framework is underpinned by a licence, supplemented by annual monitoring of pricing, service quality and capex, and that a review will take place in the second half of 2016 to check how the Commitments are working in practice.

Donagh Cagney, Economics Manager at ACI EUROPE commented “The relationship between airports and airlines is a symbiotic one, albeit with some points on which there is sometimes disagreement. The aim of this analysis paper is really to build on the common ground we share with the airlines and advocate a means to better cooperation. It’s not the end-of-story answer, but it can only help make the debate more constructive. We need a more innovative approach to airport regulation in Europe based on trigger regulation or price monitoring. It would limit regulatory intervention and incentivise airports and airlines to develop better commercial relationships based on long-term contracts.”

The paper’s release at the ACI Airport Economics & Finance Conference in London generated a lot of interest from stakeholders from both sides. Expect the debate to run on for a while longer.

The analysis paper can be downloaded at http://bit.ly/OwSU4C

Fresh analysis released on Competition

One highlight from this year’s ACI Airport Economics & Finance Conference in London was the launch of fresh analysis on competition within the aviation industry. This new analysis is the latest chapter of a debate about airport competition, which began in June 2012, when Copenhagen Economics and Dr Harry Bush, former UK airport regulator, published the first-ever comprehensive study of Airport Competition in Europe. That study provided quantifiable evidence of the significant extent of airport competition. ACI EUROPE also produced a digest of the study called How Airports Compete.

In November 2013, airline trade association IATA contributed to the debate with its own briefing paper on the subject. That paper provided an alternative perspective and challenged the extent to which both passenger and airline switching between competing airports actually happens. However, the IATA paper also revealed potential common ground as regards the policy responses and solutions that the debate on airport competition requires. As a result, both ACI EUROPE and IATA seem to share the view that the using one rigid approach to regulating airports should be avoided – and that regulation needs to be proportionate to the actual degree of market power enjoyed by individual airports.

The new ACI EUROPE analysis paper Competition in the European Aviation Sector, launched in London builds on these commonalities with the objective of moving the debate on airport competition forward. It refines the way in which the market power of both players should be assessed and considers the impact upon their respective negotiating positions.

Dr Waleed Youssef, Director, Middle East Region, TAV Airports Holding: “We are very fortunate to work in such a dynamic industry that continues to grow. Our focus is on innovation and optimising our operations. One area of innovation is our industry’s focus on commercially oriented operations – this is taking place whether we are publicly or privately owned.”

Emma Gilthorpe, Director Strategy, Planning and Regulation, criticised the price cap imposed on London Heathrow by the UK CAA in its decision on price regulation of the airport, while recognising that it’s correct that Heathrow should be regulated in the current five-year period. “Heathrow operates in a vibrant, dynamic competitive environment. Regulation is supposed to reflect competition. Heathrow does not compete in the same market as London Gatwick. We are the only hub airport in the UK,” she said.

Donagh Cagney, Economics Manager at ACI EUROPE commented “The

Michael McGhee, Partner, Global Infrastructure Partners, explained that London City, London Gatwick and Edinburgh airports are all performing well. He said the GIP approach to airport investment is to “improve the assets”, with a “long-term approach” focused on “delivering better service”. McGhee also highlighted a step-change in efficiency at London Gatwick, where it has managed to increase runway capacity at the single-runway airport from 50 movements per hour to 55. The new target is 58 movements per hour.

Kyran Hanks, Strategy & Regulation Director, explained that London Gatwick acknowledges that the UK Civil Aviation Authority has continued to accept its Contracts and Commitments framework as the best way forward to regulation. He said the framework is underpinned by a licence, supplemented by annual monitoring of pricing, service quality and capex, and that a review will take place in the second half of 2016 to check how the Commitments are working in practice.

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Amid ever increasing industry competition, Europe’s airports are using their regional individuality to stand out, and one of the best opportunities to do so is in the retail environment. Operators are going to great lengths to create a feeling of their cities within airport walls through elements of native architecture and culture, and the popularity of locally sourced produce is soaring.

At Budapest Airport sales of Hungarian goods rose by a phenomenal 300% in 2013, and enticing ‘trinity’ promotions with retailer Heinemann Duty Free and homegrown brands are increasingly attracting consumers to Budapest’s offering of indigenous fine food and drink. Goose liver, Pick salami, Szamos chocolates, Zwack Unicum liqueur and Pálinka Hungarian brandy have all become firm favourites among travelling consumers. “Hungarian wines are being recognised more than ever before for their richness in quality, and Herendi porcelain makes a valuable and unique gift,” added Kam Jandu, BUD’s Chief Commercial Officer. “If you’re a foreigner you are always looking to take home that ‘local flavour’ to your family and friends, rather than globalised brands that you can buy in every country.” Hungarians, meanwhile, are proud of their local produce, and buy Pálinka or foie gras airside to take as gifts when travelling abroad.

“It’s nothing new that the first impression is vital in shaping the opinion of a city on arrival,” Jandu said. “The airport is the first, and last, impression a traveller experiences, and that should be a heart-warming experience.”

Danish architecture and Nordic ambience

At Copenhagen Airport, localisation is at the forefront of its retail strategy. Since 2010 it has worked to develop its shopping experience and create a sense of place, by providing a mix of “local hero” brands and a typically Danish atmosphere for an inherently ‘Denmark’ experience. “Travellers truly appreciate the unique Danish architecture and the Nordic ambience that has become a Copenhagen airport trademark,” Carsten Nørland, VP Sales and Marketing, said. “They want to have a sense of where they are, and we feel that we meet this with our Danish interior design and variety of Nordic stores in the shopping area.”

Early last year Copenhagen Airport and Heinemann Duty Free unveiled the striking new Regional Area – an entire area in the main duty free store dedicated to Danish products, specialties...
Global travel retail excellence

www.worlddutyfreegroup.com
and delicatessen items. Inspired by the famous Little Mermaid statue in Copenhagen harbour, a five metre tall, stylised version made from ash wood presides over the store, filled with Danish produce. Danish heritage is an integral part of the store’s design, with a shop interior tailor-made for the airport and unique Danish aesthetics incorporated into the ceiling, seating and lighting.

Lego, Danzka vodka and Anthon Berg chocolate are among the brands CPH deems its ‘local heroes’. “They give the passengers coming to Copenhagen Airport the sense of Denmark and Scandinavia from the first minute they set foot on Danish ground. It is important to give the passengers the Danish feeling instantly to give them a unique experience,” Nørland said.

Innovative Dutch design

The recently renovated Lounge 1 retail area at Amsterdam Airport Schiphol has been hailed as a visionary commercial concept, aiming to radically reinvent the categories of liquor, tobacco and confectionery. The product sub-sectors have been given their own room within the duty free space, each with its own music and design drastically different to the next, to “seduce customers and encourage curiosity.” Otto Ambagtsheer, Managing Director Business Area Consumer Products & Services, explained.

Innovative concepts are at the core of Schiphol’s retail strategy, and the forward-thinking airport has developed a distinctly Dutch sense of place for the many transfer passengers who spend a few hours in the commercial area. “We like to provide unique concepts within retail and food & beverage that represent typically Dutch culture and heritage in a modern way,” Ambagtsheer said. “Our flower shop in Lounge 3 is a great example, it is positioned in a central place and has a dedicated design to it. Secondly we provide on the Holland Boulevard many concepts which have a link to the Netherlands, such as the Rijksmuseum and its museum shop, an airport library where the book offer has a connection to Dutch culture, history, writers and Dutch design, and within food & beverage we have the Dutch Kitchen & Bar in which we offer typically Dutch food in an international setting.”

The Best of British

The Best of British is a theme resonant throughout the entire development of Heathrow’s new Terminal 2. The Queen’s Terminal will open in June and has been named in recognition of the 60-year relationship between Heathrow and Her Majesty the Queen – something that has been brought to life in every aspect of the airport experience. “You get a sense that when you’re in the terminal that you could be nowhere other than in the UK, and nowhere other than in London,” said John Holland-Kaye, Development Director at Heathrow Airport. Heathrow has captured the essence of the British High Street and feel of the London shopping mecca of Bond Street, in the creation of an offering that embodies iconic British retail.

Terminal 2 will feature more British brands than any of the airport’s other terminals. The new terminal also provides the opportunity for UK brands to showcase their products to a wide global reception. Already there is the hum of excitement around the introduction of definitively British department store John Lewis, which will reach an international audience for the first time from its only airport shop, while Fuller’s, which brews its beer just eight miles from Heathrow, will have its first pub in the airport, the London’s Pride. One of T2’s most iconic new sites will be in food & beverage, where English celebrity chef Heston Blumenthal will open his first airport restaurant. The Perfectionist’s Café will deliver a unique offering, which includes the first wood-fired pizza oven in an airport. The ambitious project demonstrates the emphasis the airport has placed on creating an extraordinary experience through commercial concepts in an industry environment where non-aeronautical revenues are key contributors to success.
Vanderlande Industries is the leading supplier of integrated baggage handling solutions at airports. From check-in to aircraft hold, from arriving flight to reclaim carousel, including related software solutions and operations and maintenance. Find out what we can do for you at Passenger Terminal Expo in Barcelona, stand no. 1630

www.vanderlande.com
Money makes the world go around

International passenger traffic at the world’s airports climbed by +5.2% year-on-year in 2013, and as propensity for travelling grows so does the need for international currency. Discerning passengers seek not only the most competitive rates, but also the most convenient means of changing their money, and accordingly foreign exchange providers are developing original and innovative ways to stand out in the competitive currency market.

Innovating for an exceptional customer experience

We need only look to the companies delivering them to see how demand for foreign exchange services is growing. Global leading provider Travelex makes a foreign exchange transaction more than once every second, and supplies more than 37 million retail customers a year with 80 different currencies. “We operate at 106 airports, through 1,500 stores and 1,250 ATMs, and can be found in 10 of the world’s 20 busiest airports,” said Steve O’Donovan, Travelex Partners & Business Development Director. “Driven by our global reach, we understand the global traveller better than anyone else.”

Its multi-channel sales approach helps grow transactions at airports, and Travelex works in unity with its airport partners to achieve the best customer experience and drive innovation.

Travelex has historically pioneered new and inventive products in the market. Its e-Commerce offering is highly advanced – outbound customers can place online currency orders for collection just four hours in advance – while its mobile-optimised site enables a simple and streamlined mobile purchasing experience, and next Travelex will develop a number of mobile apps. On-airport Travelex has used proximity-based mobile marketing, whereby potential customers walking past its stores are sent an SMS promoting its services, and it is now rolling out new state-of-the-art digital rate boards providing customers with timely and relevant messages.

“Recently we have established the ‘Travelex Accelerator’, set up to research and develop the latest state-of-the-art innovations in currency exchange and international payments,” O’Donovan said. “Travelex is heavily investing in bringing an innovative card proposition to market which has successfully launched as ‘proof of concept’. This product has the potential to revolutionise how people pay for things abroad.”

Service without limits

UK-based Moneycorp, meanwhile, experienced unprecedented growth last year – its retail business unit increased by more than 58% with the opening of 39 new airport stores. “We’re clearly seeing the recovery of the travel market, the recovery of the international housing market and increases in import/export volume, all of which play to our strengths,” said Mark Horgan, Moneycorp’s CEO.

Alongside its rapidly-growing ATM fleet, prepaid card with 14 currencies, and unique Reserve and Collect service, which offers the better of the two rates between booking and collection, Moneycorp is now changing the face of on-airport exchange with the development of its new “barrier-less” retail concept. It will soon introduce walk-through bureaux, designed to remove the barriers between customer and corporation and equal the level of service offered by the increasingly high-end shopping experiences that customers have come to expect from airports.

“That means removing glass fronts from stores and taking the counters out – so stores won’t look like traditional square windows where people queue in the corridor, but will be like a normal retail store that will invite people in,” Horgan explained. The first of the remodelled stores will come into being in June, just four doors down from the first John Lewis department store in Heathrow’s soon-to-open Terminal 2, and will be followed by a second in London Stansted. “It’s quite a subtle change, but I think it’s quite an important change in people’s expectation of service,” Horgan said.

“We partner with airports to drive the best customer experience through great service, multiple channels, innovation and an expert team of friendly front-line colleagues,” said Steve O’Donovan, Travelex Partners & Business Development Director.
Our foreign exchange expertise, specialist technology and global reach ensures we are trusted to deliver innovative FX solutions to meet the changing needs of our partners wherever they are in the world.

To find out how we can work with your business visit travelex.com
New airflow provisioning systems

**NEWS**

ThyssenKrupp Airport Systems, a renowned provider of passenger boarding bridges (PBBs) and aircraft ground support equipment, recently launched two new auxiliary systems for passenger boarding bridges, both of which are ecological and environmentally friendly: CNDL, an intelligent pre-conditioned air (PCAir) hose management system and MTO, a high-performance refrigeration duct system. CNDL provides a cooling rate improvement of 10-15%, together with a power saving when the PCAir equipment is installed directly beneath the PBB. MTO, meanwhile, significantly improves the airflow when the PCAir tools are evacuated in the terminal or on the apron.

MTO consists of two to three telescopic sections – depending on the length of the PBB – which are manufactured in stainless steel. The high-performance quality thermal insulation of MTO is achieved by special polyurethane foam isolation and a special rubber profile sealing. CNDL is an improvement of already existing storage systems for PCAir hoses. The flexible hose construction enables the compressed deposit of the hoses instead of furling them. This also allows extraction of the exact hose length needed according to each individual case or type of aircraft. "This way our system guarantees a sustainable and efficient energy and air supply for grounded aircraft, as the shorter the way the cooled air has to take, the less significant are the temperature and pressure losses when the air finally arrives at the aircraft and the less energy is needed for the cooling process. Especially for countries with high outside temperatures, this offers many environmental and economic benefits," explained Jose Manuel Ardura, who is the responsible Engineering Manager at ThyssenKrupp Airport Systems.

London Heathrow was the first airport to install two prototypes of CNDL last summer, and has ordered a further 18 units.

Moreover, the system is very easy to operate as it has a low-weight aircraft connector with the operator panel located in the drive unit.

**The next evolution in self-service bag drop**

**NEWS**

DSG Systems AS is currently releasing its next generation self-service bag drop solution. This product combines the concept of 1-step and 2-step into a single fully configurable unit. DSG Systems AS recognises that different customers have different requirements, therefore, its new solution is fitted with a variety of options and functionality, including:

- Boarding pass scanner
- Payment solution
- Bag tag printing
- Receipt printing
- Near field communication (NFC)
- Radio frequency identification (RFID)

The first RFID version has already been manufactured, and is being prepared for installation at its designated airport in April.

The intuitive design has been developed together with an international design bureau, resulting in a modern look. Together with the most recent hardware and the latest software, it is made with the absolute goal of easy integration. This results in a faster and easier travel experience and, therefore, more satisfied passengers.

Home printed tags are also supported by the product.

The solution may be fitted into any check-in counter, existing or planned. The unit may either be integrated into the design of the desk or be manufactured or attached to a desk, a conveyor or the floor. It may be placed on the side of a conveyor or directly above it, as there are a number of ways to fasten the unit to the existing infrastructure.

Like all solutions from DSG Systems AS, this new product may be fully customised to meet every design and regulatory requirement specified by the customer, while providing maximum usability, safety and IT security. It is also possible to run advertisements or information on the display, when the unit is not in use.
eezeetags introduces a new experience in the self service bag drop process. And it all starts with the tags itself. eezeetags are high quality bag tags that have no backing paper to pull away and nothing that sticks to clothes, bags or floors. They only stick to itself and to nothing else. The result? No waste paper at drop off point, no false sticking possible and therefore a much higher self tagging success rate. According to some major airlines that use eezeetags for their bag drop process this ensures a more easy and seamless travel experience and increases the level of satisfaction of the passengers.

www.eezeetags.com
DSG SYSTEMS self-service bag drop solution simplifies and streamlines the process of checking in. The passenger finds our SBD easy to use, thereby reducing check-in time and improving the general experience of the travel. The solution may be easily customized to meet any design- and regulatory requirements.

THE SBD.DASHBOARD is a centralized role based configuration and reporting tool for the self-service bag drop solution, as well as being a complete real-time monitoring tool. This will, at all times, give you a complete overview of the operational status.
EYE4U: Wearable video-based helpdesk support

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 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 Industries hotline & helpdesk support services and further extends its helpdesk capabilities to increase effectiveness, speed response and correct problems in the shortest possible time. It was introduced at inter airport Europe in October 2013, and has already been delivered to companies in the Warehouse Automation sector. Bergamo Airport is the first airport at which this remote monitoring tool will be implemented.

A positive passenger experience

With passenger numbers rising and terminal capacity limited, airports are utilising new technologies to provide a positive end-to-end travel experience. Self-service technologies are increasing prevalent in the modern terminal building, including kiosks, bag drop, biometric iris scanning, automated passport readers, modern security lines, self-boarding gates and even vending machines. An increasing number of airports are adopting CUS$ solutions instead of renting out CUTE counters to airlines. Passengers can check in at any kiosks and print out a boarding card and bag tag, self tag their bag and drop it. Alongside home-printed and permanent bag tags, there is also a need for bag tags printed at the airport. ezeeTags have been created to meet demand for easy to use bag tags for self tagging, and are said to make self tagging 100% intuitive.

Expediting border clearance

Seven airports and millions of passengers across North America are now travelling faster with a new automated passport control solution custom-designed by Vancouver Airport Authority (YVR). The system, BorderXpress, uses self-service kiosks to expedite the border clearance process, resulting in shorter waits for passengers, fewer missed connections and cost savings for airports. Eligible passengers entering the US – no pre-registration and no fee required – simply scan their passport at the kiosk and enter declaration information digitally, instead of filling out a declaration card. The kiosk prints a receipt, which passengers present to a US Customs and Border Protection (US CBP) official for verification. Eligible passengers include US and Canadian passport holders, and international travellers with Electronic System for Travel Authorisation (ESTA) approval.

Passengers can be cleared up to four times faster than those using the conventional process, and the US CBP primary inspection process is cut by 86%. The results for early adopters are impressive. In the first 40 days of operation, Chicago O’Hare’s kiosk users took an average of just four minutes to proceed through customs, while non-kiosk users spent 38 minutes. Peak wait times were reduced by 33% for all passengers.

In under a year, more than 2.7 million travellers have used the system at YVR and six other airports that have installed BorderXpress systems – Chicago O’Hare and Midway airports, Montreal, New York JFK (Terminals 4 and 3), and Seattle. A speedy border process that allows people to catch their connecting flights improves both the passenger’s experience and the airport’s reputation.
“Streamlined” is a term often used in the aviation industry. Where some apply it to aeronautics, we apply it to excellence in baggage handling. Together Crisplant and BEUMER offer a unique blend of hardware, software and “brainware”. For us, streamlining doesn’t simply mean quicker, greener and safer technology. It means seamlessly integrating end-to-end baggage handling solutions that meet an airport’s specific requirements. For us, efficiency doesn’t end with project commissioning; it just starts there. Our global Customer Support organisation ensures you reap efficiency gains from day one and continue to do so long into the future. For efficiency without limits, visit www.beumergroup.com.
Recognising progressive ideas in action transforming airport performance and reputations

Air France introduces home-printed bag tags

Air France has launched home-printed bag tags, enabling passengers who check-in online to print their bag tags along with their boarding pass at home. The bag tag can be printed on an A4 sheet of paper, folded and placed in a plastic wallet, which can then be attached to the bag. Upon arrival at the airport, the passenger simply has to drop their bag at a bag drop desk. Home-printed bag tags are currently available to passengers flying with Air France on domestic services only, due to the current European Commission customs legislation preventing their use on international services. However, the airline is hoping to expand the service to also cover international flights later this year. The French carrier is the second airline to permanently adopt home-printed bag tags, following in the footsteps of Iberia, which launched them in July 2013.

Lyon Airport unveils Welcome Zone

Lyon-Saint Exupéry Airport has opened its new Welcome Zone, which provides arriving passengers with all the information they need on the local area, transport schedules and tickets, and details on nearby facilities. The Welcome Zone was developed by the airport in partnership with Rhône Alpes Tourism, Only Lyon Tourism and Congress, and Rhônexpress. It includes a number of advisors and interactive multimedia devices to help travellers plan their trip in the Rhône Alpes region. To make it as easy as possible for passengers to find the information they need, it is divided into three areas: ‘Tourism and Airport’, ‘Lounge’ and ‘Transport’. In the Tourism and Airport area, passengers can talk to advisors about the services in the airport and surrounding area. In the Transport area, travellers can find out local transport schedules and purchase tickets, while in the Lounge area they can use tablets to find out more on the destination, and view images and videos of what the region has to offer. The Welcome Zone is designed to simplify the travel experience for arriving passengers while also giving Lyon-Saint Exupéry Airport a sense of place.

EMAS/arresting systems – an alternative to a RESA

The Sixth Edition of ICAO’s “Annex 14, Volume I, Aerodrome Design and Operations to the Convention on International Civil Aviation” is now in effect, officially expanding the suite of Alternative Means of Compliance for runway safety to include aircraft arresting systems. This includes EMASMAX, the latest, most durable version of Zodiac Arresting Systems’ field-proven EMAS (Engineered Material Arresting System), developed with and approved by the Federal Aviation Administration (FAA). Composed of blocks of lightweight, crushable concrete designed to safely stop aircraft that overshoot runways, it is an acceptable alternative for preventing overrun catastrophes at airports where Runway End Safety Areas (RESAs) do not exist or are impractical due to environmental or other issues. Annex 14 had previously addressed international Standards and Recommended Practices (SARPs) for the provision of RESAs to reduce the risk of damage to aircraft during an undershoot or overrun. ICAO’s policy update allows EMAS/arresting systems to be installed within the runway strip, a critical factor when RESAs are non-existent or severely constrained. For runways with adequate RESA space, an EMAS installation can provide a means of reducing the length of the RESA, freeing up valuable real estate for other airport planning purposes, such as runway extensions.
Frankfurt Airport app aims to personalise travel experience

Fraport has launched the new Frankfurt Airport App 2.0, which includes a number of innovative features designed to provide passengers with more information that is relevant to their specific trip.

The app, which is already available for free on Android and will soon be available for iOS devices, is available in German and English, as well as, for the first time, Mandarin for Chinese travellers.

Passengers can use the app to find out information ahead of their trip, such as how to get to Frankfurt Airport and on-site parking options.

Once they are at the airport, users can choose to receive flight updates and information on gate changes via automatic push notifications. The app also offers vouchers for retail stores, as well as a navigation feature to help users find their way around the airport.

Nicole Ebner, Senior Executive Manager Business Development, Retail and Properties at Fraport AG, said: “Frankfurt Airport is one of the largest and most important hubs worldwide. Therefore, it is our goal to offer an app that meets the individual needs of passengers and offers them the best service possible.”

Iberia partners with Samsung on NFC project

Iberia and Samsung have signed a Memorandum of Understanding to jointly develop and promote a variety of Near Field Communication (NFC)-based solutions to help simplify the airport experience for passengers.

As part of the agreement, Iberia passengers who check-in online will have the option of receiving their boarding pass on their NFC-enabled smartphone. The boarding pass will be stored on the SIM card within the smartphone, meaning passengers can use their mobile device to access the security area or board their flight using their mobile, even if it is switched off.

Iberia and Samsung will also explore how they can use SIM-based NFC to allow passengers to enter airport lounges and receive personalised airport and flight information at the airline’s interactive Quick Service Points.

The partners are pursuing NFC due to the fact that the reading process is faster than the current optical barcode readers, which will help to increase processing times and reduce queues at checkpoints across the airport.

Further down the line, they will work together to explore how NFC can be used to improve baggage processing and onboard services.

Innovating to improve the end-to-end airport experience

To support the launch of the Passenger Service Ambassador initiative at London Heathrow Airport, Omniserv and Blackjack Promotions Ltd have developed a unique piece of software that is designed to simplify and enhance the passenger experience.

Omniserv, the UK division of AirServ Corporation, acquired Blackjack in August 2013 following the award of the Passenger Service Ambassador contract at London Heathrow, and the alliance has focused on using new technology to deliver a higher level of customer service.

The software, which is designed for use on electronic devices such as iPads, has been created to enable OmniServ staff to engage with customers in the airport environment without interrupting the service delivery with lengthy and complex feedback and data capture reports. It has been designed with a view to connect the workforce across all terminal and locations throughout the departures, arrivals and connections journeys.

The goal was to allow for key information to be passed between staff at different locations across the airport to enable proactive preparation for sudden influxes of passengers and dynamic deployment of resource.

“The app enables the employee to engage with the passenger no matter what language or question asked. We use a version of google translate to enable the employee to communicate and allow internet searches to insure we are always ready to help,” described Antony Marke, Director Passenger Services at OmniServ. OmniServ and Blackjack worked with London Heathrow to fine-tune the software, which includes 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.

The Web app that Omniserv has developed is optimised to work over 3G, meaning the employee is truly mobile. The system empowers the employee by presenting relevant information to the employee based on the role they are performing at the airport.
SPECIALISTS IN JOINING UP THE "END TO END" PASSENGER EXPERIENCE

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Getting to the seat of the design problem

The seats on which we wait at the gate, send a quick email and repack bags are not likely to be the first thing passengers notice about their airport journey – and that’s exactly as it should be, thanks to shrewd and intelligent design. Report by Amy Hanna.

In furnishing airports, seating designers need to create a product with a high functional and aesthetic life expectancy that fulfills the conflicting interests of both passenger and airport. “We have on one side the airport, which is looking for a durable, low-maintenance and very sturdy solution, whereas passengers just want somewhere comfortable to sit down,” explained Pascal Berberat, Head of Airport Division, Vitra International. Vitra brings together enterprising Swiss engineering with international design ingenuity to create public seats for airports the world over. “We understand that an airport is a machine built for efficiency,” he said. “But the passenger should not be bothered by what is going on behind the scenes.” Vitra supports airports by providing products and services that facilitate airport processes invisibly in the background while meeting the needs of passengers, like the public Work Relax and Sleep zone in Munich Airport’s Terminal 2. Intelligently designed sofas, reclining loungers, worktables enable both privacy and productivity. “There is a match,” Berberat asserted. “An airport is a very diverse area, like a city, offering a variety of services, and with our very diverse product portfolio, we can find the answer for every different area.”

Seating solutions for the future

As airport environments continue to evolve, the requirement for seating to cater for multiple passenger profiles is now more important than ever. In this regard London-based furniture manufacturer OMK Design is in constant consultation with the industry’s foremost architects and operators to ensure that its products are truly future-proof.

Providing the right type of seating for each area is key to satisfying the needs of every passenger. Business travellers, for example, now require many of the facilities traditionally provided in airline lounges within the main terminal. This has led operators to move away from conventional linear units, which do not offer dynamic layouts, in favour of group seating such as OMK’s Trax Hub. This can be used singularly, offering added privacy and optional power integration provides a comfortable place to work.

It is equally important to provide a sufficient number of seats for passengers waiting at the boarding gates – a developing problem with the ever-increasing capacity of new generation aircraft. Unlike new-build projects, which are designed to hold larger numbers of passengers at the gates, evolving airports face the problem of fitting in more seats to their existing footprint. Identifying this need, OMK has developed a new system, the T500, with a small footprint giving a greater seating density.
The Vitra Airport Division delivers its planning and design expertise to major airports worldwide, supported by Vitra’s extensive and strategically engineered product range. From gate seating and lounge furniture, as shown at Molde’s airport Norway, to air traffic control and restaurant areas, Vitra delivers world class airport solutions.
More than £60 million (€70 million) has been invested in the cutting-edge building interiors that swathe Heathrow’s new Terminal 2, in an enterprise executed by Lindner, one of Europe’s leading companies for interior fit-out, facade construction and insulation engineering.

Safety is at the crux of Terminal 2’s development, and one central element is the trailblazing, explosion-resistant interior building material, developed by Lindner in close collaboration with the airport to make the T3 airport journey the safest ever for passengers.

Heathrow was one of the first airports to incorporate the potential threat of terrorist attack into its interior cladding requirements, and the new terminal’s 3,000sqm of groundbreaking bomb blast-resistant glass wall cladding has been developed to meet the latest in safety requirements. In tests the uniquely crafted wall system proved capable of withstanding 15kg of TNT detonated at a distance of 6m, preventing the splinters and fragments that cause most injury in these events. “It is not only the explosion itself but also the highly underestimated hidden danger in the fabric of the surrounding building that causes the most harm to people,” said Stefan Heindl, Lindner’s Head of Airports and Special-Purpose Constructions. "Flying particles released from surrounding glass, metal or even concrete structures represent a huge danger, acting like bullets after the detonation of a bomb."

Intelligently constructed, the Lindner wall system incorporates high-quality glazed, metal or synthetic panels that are engineered to withstand a blast impact.”

Heathrow’s new £2.5 billion (£3 billion) Terminal 2 is an enduring icon of sleek and airy design, with innovation inherent to its make-up. The building’s intelligent, multi-functioning façades and uncompromisingly robust interior were designed and implemented by Lindner, and are an integral part of the terminal’s ingenious constitution – they not only look good, they also ensure the safety of all who use the new building.

Beautiful airport interiors for a beautiful island

Lindner also largely contributed to completing the new terminal at Mauritius’ foremost international airport Sir Seewoosagur Ramgoolam Airport (SRR) which was officially inaugurated in September 2013 after three years’ work. Lindner supplied high quality metal ceilings and partitions to what represented the biggest construction project in the country’s history.

The airport’s decision to be fitted out with high quality products from Lindner is in line with the terminal being built in accordance with the Mauritius Sustainable Island concept, a national priority of the country’s government. Moreover, the harmonious use of Lindner timber and glass partitions also contributes to the idea of Green and Sustainable Building. As well as their elegant appearance the partitions boast perfect sound insulating characteristics.

The appearance of the baggage hall at Sir Seewoosagur Ramgoolam Airport is dominated by a natural and vivid mixture of curved, plain and transparent surfaces, while the ceiling’s curved plain elements create waves throughout the entire room.

Lindner’s high quality glazed and metal panels in Heathrow’s Terminal 2 prevent the splinters and fragments that create one of the biggest sources of injury following an explosion.
Lindner – Your partner for premium interior fit-out and facades.

Airports combine challenging, modern architecture with a high degree of functionality. Lindner turns your visions and individual project requirements into reality with customised, high quality products. www.Lindner-Airports.com
Our self-serve BorderXpress kiosks help passengers clear customs easily, securely and without pre-registration. We were the first to introduce the technology in 2009, and we’ve been perfecting the experience ever since. Our automated passport control system now serves millions of customers, in 13 different languages, from 6 airports. And that’s just the beginning. BorderXpress is built by an airport, for airports.

yvr.ca/apc
Iconic British brand John Lewis is opening its first airport store in Heathrow’s new Terminal 2, as an exciting step forward in the development of its international strategy.

**Best of British**

Max Vialou-Clark took on his new role as Retail Director at Heathrow Airport in January. It is an exciting time to take on this new responsibility, as the airport prepares for the June opening of its new Terminal 2, in which a vibrant, world-class retail offering is a central element of the passenger experience. Vialou-Clark outlined his initial priorities to Ross Falconer.

Max Vialou-Clark’s background is not in airports, or indeed aviation in general. However, he brings a wealth of very relevant experience, broadly focused on product sales and marketing, and operating at the consumer-facing, front-end of the business. In short, he spent three years in with supermarket chain Aldi, then nine years in the snack division of PepsiCo UK, before taking an MBA at Cranfield University. A five-year stint in banking with HBOS was then followed by three years back in supermakets with Sainsbury’s. He arrived at Heathrow in 2011 as Retail Services Director, in which his patch was essentially non-retail commercial income (car parking, advertising etc).

In addition to all of the retail outlets, Vialou-Clark’s responsibilities in his new role as Retail Director include the food & beverage, bureaux de change, and the media estate.

After just a few minutes in his company, Vialou-Clark’s passion for delivering a great customer experience shines through. He enthuses about the importance of the “right product and range,” and above all about creating an “experience”.

Heathrow has long been considered as a centre of commercial excellence. When Terminal 5 opened in 2008, its luxurious retail offer was lauded. When the new Terminal 2 opens on 4 June, it promises to be equally impressive, but with a different retail emphasis that is very much centred on the ‘Best of British’.

“Terminal 2 is obviously high on the list of priorities,” explained Vialou-Clark. “The bar is getting higher and higher in…"
Patrick Bohl to spearhead BUD retail

Following a restructure at management level, Budapest Airport has appointed Patrick Bohl as Head of Retail and Advertising. Since 1 March, Bohl has been leading the successful retail and advertising business unit, with a focus on maximising the airport’s commercial and marketing performance.

A well-known figure in the industry, Bohl joined the airport’s management team in 2008 as Head of Airline Business Development, after spending 10 years in sales and operational roles at British Airways and Malév. His strong background in marketing and sales has been put to great use at a time when the airport’s customer base changed significantly following the demise of the national carrier Malév in 2012, with the airport maintaining, and then exceeding, pre-Malév traffic levels. The airport handled 8.5 million passengers in 2013 – up +0.2% on 2012.

Bohl’s brief is to increase spend-per-passenger and to strengthen and enhance relations with current and future concessionaires. He commented: “This new opportunity gives me the chance to greatly extend my management skills and knowledge base. I am really looking forward to working with my new team to find fresh ways in which we can deepen passenger spend, and exceed the airport’s commercial revenue targets. Myself and the team have a lot of really good ideas.”

Kam Jandu, Chief Commercial Officer, added: “We are really pleased with this powerful new appointment. Patrick’s results-orientated approach and long experience in project management combines with the fact that he is a very well-known and respected figure in our industry. I fully expect to quickly see his hand in making our succeeding commercial portfolio perform even better.”

The focus on non-aeronautical growth is evident throughout the bud:future modernisation programme, with €320 million invested in improvements since 2011, including the flagship SkyCourt development.

A Maserati Ghibli is drawing the crowds at SkyCourt in March. While the €100,000 car is an advertisement for the premium marque, the retail promotions space will also be used for a scheduled 15 Trinity promotions this year, starting with luxury Szamos Chocolates in March. Last year’s Trinity promotions, in partnership with Heinemann, resulted in sales increases exceeding 250% for each product promoted.

A BUD delegation will be present at the ACI EUROPE Airport Trading Conference & Exhibition in March.
THE ANNUAL MEETING FOR AIR TRANSPORT CHIEF EXECUTIVES AND INDUSTRY LEADERS

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Madeira marks 50th anniversary with passenger growth

Madeira Airport, host of the 7th ACI EUROPE Regional Airports’ Conference and Exhibition in May, celebrates its 50th anniversary in 2014. It does so at a time of notable growth, as Ross Falconer reports.

Madeira Airport is the gateway to one of the oldest tourist destinations in Europe. The airport has long been an engine for tourism and economic development on the island. Its passenger traffic grew by 7.6% in 2013 to reach 2.4 million, and a further increase to 2.5 million is forecast in 2014.

Located between the towns of Santa Cruz and Machico, the island’s capital – Funchal – is just a 15-minute drive from Madeira Airport. The island itself is known as the ‘Pearl of the Atlantic’ and among its most famous attractions is the Laurissilva forest – a UNESCO World Natural Heritage site.

A key piece of infrastructure that has allowed Madeira to continue its role facilitating tourism is its award-winning runway, built on a platform supported by 180 columns, and extending partly out over the ocean. The 2,800m runway can handle aircraft up to the 747-400.

43 airlines operate a total of 77 routes from Madeira, and with 44% of total traffic, Portugal is its main market, followed by the UK with 18.6% of traffic, and Germany with 12%. “These are the most important tourist markets for Madeira and the ones where the Madeira Promotion Bureau makes a significant investment in marketing campaigns,” commented Silvia Dias, Aviation Marketing Manager, Madeira Airport.

The airport works closely with the regional tourism authorities, partnering with Madeira Promotion Bureau to promote the island to its main markets and jointly participating in aviation and tourism events. Madeira Airport is also a member of the board of Madeira Promotion Bureau. Alongside this, the airport’s strategy also includes attractive incentive support schemes for airlines and tour operators, when opening new routes or increasing frequencies.

A marketing campaign was launched in January promoting Madeira as an all-year round holiday destination, initially to the UK and German markets. Indeed, among the most recent new routes are weekly Germania services from both Erfurt and Karlsruhe/Baden-Baden to Madeira, which were launched on 25 February.

The 50th anniversary will be marked with special events throughout the year for passengers and the local community. The highlight will be a formal dinner that will take place at the airport on 15 September. Meanwhile, a Museum Centre is to be opened at the airport, which will tell its story over the past 50 years of operation.

Looking forward, Madeira Airport is hosting the 7th ACI EUROPE Regional Airports’ Conference and Exhibition in May, and reports that this is a very important part of its 50th anniversary celebrations. “We are very pleased to welcome this event, as it is a great opportunity to raise Madeira’s awareness as a high quality tourist destination. Madeira has a repeat visitors rate of over 30%, which means our guests are very pleased with our island! The ACI EUROPE event will surely contribute to increasing this figure,” concluded Dias.

ACI EUROPE’s Regional Airports’ Conference & Exhibition will take place from 12 to 14 May 2014. For more information, visit www.aci-europe-rac.com
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Delivering ‘Swissness’: The developments on Switzerland’s aviation horizon

The Swiss aviation landscape is one of two halves. At one end of the spectrum are its main international hubs, which have registered considerable passenger growth in the recent past, and at the other are the nation’s regional airports, on which the combined negative effects of the economic crisis and the collapse of a series of regional airlines is still having an impact. All, though, play crucial roles in the overall aviation panorama of the country, offering high-value customer experiences, and a diverse choice of destinations to the market.

Development is widespread, and across the country Switzerland’s airports are making infrastructure improvements and expanding their route networks to deliver the unique Swiss qualities that are so synonymous with the nation.

Zurich International Airport

“‘Swissness’ is the very essence of our airport. It is our aim, and our passengers shall feel and receive it,” said Thomas Kern, CEO, Zurich Airport. “It also helps to differentiate Zurich from Europe’s other airports, and provides a special experience to frequent travellers.”

Switzerland’s busiest airport, and host of the 23rd ACI EUROPE Airport Trading Conference and Exhibition, has assembled a long list of major improvements in recent months. It has just opened a brand new VIP Lounge, is halfway through an extensive rejuvenation in Terminal 2, and is now in the planning stages of the ‘Circle’, a 180,000sqm on-airport complex just steps away from ZRH’s terminal that will offer all manner of services, and will become a focal point for business and lifestyle when it opens in 2018.

Its catalogue of upgrades doesn’t stop there. In 2014 it will expand the landside retail area by a further 1,500sqm, and is introducing a range of new retail and F&B concepts. The airport’s reputed ‘Swissness’ has historically coursed through its commercial offering: “Zurich Airport has within its travel retail and F&B offer again strengthened the aspect of ‘local flavour’, with new authentic and innovative concepts such as the recently opened Chalet Suisse restaurant and the redesigned Spirit of Switzerland shop which offers a wide range of souvenirs and Swiss products,” Kern explained.

As well as improving its infrastructure, the airport is also expanding its international connections. Etihad Airways, a new carrier to the airport, is about to establish its first flights to Abu Dhabi, and beyond this Etihad Regional has been formed to operate as a feeder service out of Zurich to various European airports.

The sum of this enticing airport offering is steady growth at Zurich. Last year’s 24.8 million-strong passenger traffic exceeded the previous year’s record by +0.3%, and its target for this year is to reach the 25 million passenger mark.

Jürg Rämi, Director, EuroAirport: “We had another record year with close to 5.9 million passengers at the end of 2013, recording growth of +10% compared with 2012 (5.3 million). This growth was well above the European average.”

Photograph © EuroAirport.

EuroAirport Basel-Mulhouse-Freiburg

EuroAirport Basel-Mulhouse-Freiburg expects reasonable growth in the
coming year, its Director Jürg Rämi explained. The world’s only bi-national airport, uniquely located on the borders of France, Switzerland and Germany, experienced another record year last year, with close to 5.9 million passengers having passed through its doors, eclipsing 2012’s numbers by 10%. EuroAirport is understandably confident then, in its forecast passenger growth of around 5% to 6.2 million for 2014 – especially considering the developments taking place within its route network. The point-to-point airport added six new destinations to its route network in 2013, including its eighth based easyJet aircraft, and a ninth will arrive in March this year. Ryanair will also return to Basel-Mulhouse as of April 2014, serving Dublin and London Stansted, while myriad new destinations will be implemented at the airport from the summer. easyJet will soon fly to Bastia and Montpellier in France, Brindisi in Italy, Larnaca in Cyprus and Mykonos in Greece, Kraków, Reykjavik and Sevilla in Spain. Wizz Air meanwhile will start services to Tuzla in Bosnia and Herzegovina.

The increasingly diverse network will improve international connections for passengers, while the projected new EuroAirport rail-link will improve surface access to the airport. Preliminary technical studies on the projected link from Basel-Mulhouse airport to existing French, Swiss and German rail networks are planned to take place in 2014, as is the search for the project funding. The project is scheduled for realisation by 2020.

In 2013 the airport renovated and reopened its EuroAirport Skyview Lounge, which is now accessible to all of its passengers, and also opened the EuroAirport Business Center, which offers ten modular meeting rooms immediately bookable online.

Flughafen Bern-Belp

On the agendas of Switzerland’s airports, the delivery of a spectacular passenger journey consistently comes top. “Flughafen Bern-Belp’s strength as an airport,” explained its CEO Mathias Häberli, “lies in making passengers stay an enjoyable one. Flying to Bern is a sheer pleasure for pilots, business travellers and passengers. Short distances, excellent service at the terminal, lounge and hotel reservations, limousine services, restaurant and bistro all contribute to this.”

Short distances for checking in and after touchdown are the airport’s strong suit. It takes as little as 20 minutes from entering the airport for passengers to have passed through security, and just 10 minutes after landing passengers can already be seated in their taxi or on their bus. From there, it takes only 20 minutes to reach the heart of Switzerland’s capital by car. After Zurich, Geneva and Basel, Bern is the fourth largest airport in Switzerland, and serves as an important international base due to its attractive commercial location, the federal administration and the national and international politics that take place within the region.

As was forecast, 260,000 passengers
passed through Flughafen Bern-Belp last year, and the airport’s goal is to grow that number by a further 10,000 in 2014, when it will also make further progress on the extension to the airport’s infrastructure in its Master Plan 2009-2020.

“This expansion phase serves to decentralise aviation, and to improve the airport’s operational processes. Private aviation, maintenance operations and flight training are to be relocated to the new buildings along the banks of the Gürbe, while new hangars facilitate maintenance and indoor parking for private aircraft,” Häberli said.

Lugano Airport

“We like to describe Lugano as a ‘boutique’, where its added-value services such as the excellent customer service and the speed of operations constitute the most important element of distinction from main hubs that we can offer to our passengers,” explained Alessandro Sozzi, Chief Executive Officer, Lugano Airport. Lugano is best known for being the third financial marketplace of Switzerland, but the region also has a lot to offer in terms of tourism with its varied landscape ranging from lakeside activities to mountain trails and skiing. The airport is also the nearest gateway to other famous touristic areas in nearby Italy, such as Lake Como, only 20 minutes away.

Recent months have left Lugano facing some pressing challenges. Due to the cancellation by Darwin Airline of one of its historical routes to Rome Fiumicino, and to the difficulties experienced by Minoan Air, the carrier trying to replace it, the year 2013 disappointingly closed in the negative, with a drop of -15.6% in passenger traffic. But its marketing department is now working to close the gap, and considering the potential of the airport’s catchment area, it counts on recovering the passengers and reaching its target in the next few years. “Unfortunately this is not an easy exercise given our operational restrictions, since even though there are several airlines interested in the potential of our market, they don’t have the appropriate aircraft for operating at our airport,” Sozzi said.

The airport is currently undergoing a transitional phase, with projects aimed at adjusting the airport infrastructure to meet its market requirements. A runway extension will take place this year, and in the next few years it will continue to upgrade its infrastructure with the building of two new hangars, an apron expansion and a change to the parking layout.

“The development and modernisation of our infrastructure are the first essential steps to allow us to fully reach the traffic potential of our catchment area,” Sozzi said. “Currently our strengths lie in our tailor made services and exceptionally rapid transit time with the possibility for our passengers to check-in up to 20 minutes before departure even with luggage. These are the type of advantages we are focusing on in order to attract new high yield traffic.”

As well as widespread infrastructure developments, Lugano Airport is looking forward to the launch of a new service in the summer to Elba Island, which will connect Lugano directly with a very interesting destination for its local market. “We are also very excited by the launch of Etihad Regional, and we are following closely the opportunities this will bring in the coming months, such as the possibility to fly to Abu Dhabi via Geneva, thus widening the options for our passengers,” CEO Alessandro Sozzi said.

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Norwegian’s enterprising CEO has ambitious plans for the Scandinavian airline’s future. In February, Europe’s third largest low-cost carrier became the only budget airline on the continent to fly transatlantic routes when it began New York JFK and Los Angeles services from its Copenhagen and Stockholm Arlanda bases, and from this summer it will take on one of the most competitive markets in the world as it launches low-cost flights between the UK and the US. These landmark achievements, though, are just the tip of Kjøs’ iceberg; milestones on the journey towards his ultimate goal – to grow Norwegian into the world’s first truly global airline, without geographical, or demographical, division.

Kjøs’ strategy is clear as a Nordic glacier. By taking delivery of brand new aircraft and offering innovative service, competitive fares and industry-leading products to its customers, Norwegian will remove the exclusivity from worldwide travel. “Our philosophy is that everyone should be able to fly,” Kjøs said. “While traditional airlines grow outside their home markets by entering into joint ventures, cooperation or alliances – and let their locally based alliance partners fly their customers – we fly our customers ourselves to their destination,” Kjøs said.

“Everyone should be able to fly”

An interview with Bjørn Kjøs, CEO Norwegian

Four new Dreamliners

It might not be too presumptuous to surmise that a region-specific, eponymous airline brand may face challenges in promoting itself in international, markets, but figures suggest that this is no obstacle for Norwegian. 2013 was the seventh consecutive year in which it has reported a profit – of 437 million krone (€52.5 million) – and passenger numbers too are impressive. Last year more than 20 million flew with the airline to one of the almost 130 destinations that Norwegian counts among its network, while traffic in February demonstrated a year-on-year increase of +22%. “We believe that our low prices, vast route network and brand new aircraft speaks for itself and that this is what makes customers choose to fly with Norwegian,” commented Kjøs.

“At the same time, it’s important to have a good relationship with the airports we fly to and from. Having a close relationship with the airports means that we can offer passengers an even better product; we’re committed to being forward thinking and creative with our services, and this is evident at many of the airports we work with. We do our utmost to be innovative and introduce timesaving measures. This is something that our passengers highly appreciate.”

In order to run a competitive long-haul operation, Norwegian depends on brand new, cost-efficient aircraft. It is awaiting the delivery of 14 brand new Boeing 737-800s this year, and will also receive four new 787 Dreamliners during the first half of 2014. The new additions are the latest to what has become a modern and formidable fleet, built upon a foundation of 222 new aircraft that Norwegian purchased in 2012 in the largest aircraft acquisition in European history. As 2014 continues, Norwegian will persist with its plans to expand and open up new bases around the world to maintain an effective flight operation by basing crew locally at the start or end of the route segment. The first half of 2014 will see the opening of several bases in the US and in Spain – “and this,” Kjøs said, “is just the beginning.”
Eindhoven responds to rapid growth with extended terminal

While many European airports have struggled to register significant growth in recent years, Eindhoven Airport has seen its passenger throughput rise by +150% since 2006, when the airport handled less than 1.2 million passengers. The source of last year’s growth in traffic was three of Europe’s biggest low-cost carriers, notably Ryanair, transavia.com and Wizz Air.

To help cater for this rapidly growing demand, the airport has refurbished and expanded its terminal, and built a new airport hotel. On 21 June last year these were officially opened in a ceremony attended by almost 400 guests. State Secretary for the Ministry of Infrastructure and the Environment, Wilma Mansveld, performed the opening together with Joost Meijs, CEO of the airport, by adding the words “Hereby opened!” to an artist’s sand drawing of the new terminal.

Speaking about the new development, State Secretary Mansveld said: “Travelling from Eindhoven, passengers can now reach 66 destinations, from Sweden to Morocco, and from Turkey to Ireland. In two years’ time, the airport has welcomed an additional one million passengers. This increase made it highly necessary to expand the terminal. It also gives a substantial impulse to the regional economy. Eindhoven can be proud of this.”

Eindhoven Airport’s rapid growth in recent years encouraged the airport to invest €26.5 million in the new development. In addition, retailers, caterers and other partner companies invested around €3 million in new shops and catering concepts. The complex construction project, which took about 19 months, went according to plan and budget and was realised while the airport remained open to the public. The development consists of several new areas. A new front zone of 2,000sqm with extra retail and catering facilities, a 2,700sqm expansion of the arrivals hall, 2,700sqm of extra office space, and the construction of the Tulip Inn Eindhoven Airport hotel with 120 rooms. The terminal has been completely refurbished in order to provide passengers with a quicker and more customer friendly service. To accomplish this, adjustments and expansions have been made to the baggage system, the gates, the check-in desks and the security lanes. The terminal now has the capacity to handle five million passengers, which is hoped will be sufficient to cope with expected demand growth until at least 2020. The hotel and the new retail and catering facilities have created approximately 60 direct full-time jobs at the airport.

To optimise the customer experience within the new terminal, Eindhoven Airport developed a Customer Journey Strategy, in which digital communication plays a vital role. To plug into multiple moments of the customer journey, Eindhoven Airport...
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developed digital initiatives that have proven to be innovative and in some cases a world’s first. At the beginning of last year, the Facebook VIP programme was launched, in order to offer VIP treatment for Facebook fans travelling from the airport, including Facebook branded parking spots at the entrance of the terminal.

Later, the airport partnered with Google to introduce Google Indoor Streetview, through which passengers can already orientate on the terminal and its facilities, lowering their stress curve. This year, it will launch mobile parking at the airport, offering passengers a way to pay for their parking spot through their smartphone, after they come back from their trip.

**Environmental excellence**

The development is fully in line with the sustainability ambitions of Eindhoven Airport. The hotel meets the demands of the international hallmark ‘Green Key’ label ‘Gold’ and energy label A++. The terminal has energy label A++. Sustainable building materials and energy-efficient lighting have been used, among other things, and PV panels and solar collectors have been installed on the roofs of the terminal and the hotel. According to Mansfeld: “The airport has an ambitious strategy in the field of sustainability and the reduction of carbon dioxide emissions, and I would like to compliment Eindhoven Airport on that, because Dutch aviation is good for our economy. The fact that this growth is balanced and managed with attention to the environment is even better news.”

These environmental initiatives saw Eindhoven become the first airport in the Benelux to obtain the highest level – Neutrality – under ACI EUROPE’s Airport Carbon Accreditation programme. Joost Meijs, CEO of Eindhoven Airport, commented: “Eindhoven Airport has the ambition to be one of the leading European airports in terms of sustainability. Airport Carbon Accreditation helps Eindhoven Airport realise this ambition.”

Eindhoven Airport is the main airport for the Brainport Eindhoven Region, which is the industrial high-tech heart of the Netherlands, founded on technology and design. Companies in the Brainport Eindhoven Region are responsible for nearly a third of all Dutch spending on research and development, and the region is home to leading campuses like the High Tech Campus Eindhoven, the Eindhoven University of Technology Campus and the High Tech Automotive Campus Helmond.

“Brainport deserves a modern airport as a gateway to Europe and as a calling card for hundreds of thousands of Europeans who visit the region via Eindhoven Airport every year. As a result of this development, we now have an airport with the right appeal for this ambitious region,” explained Meijs.

**Ryanair services since April 2002, base since April 2013**

Europe’s biggest low-cost carrier, Ryanair, has been serving Eindhoven since April 2002, when it launched its first route from London Stansted. Since then it has built up a network of over 30 routes from the airport. Finally, in April 2013 Ryanair made the airport an official base, locating one of its over 300 737-800s at the airport. This enabled it to add routes to Bordeaux in France, Chania in Greece, and Agadir and Fez, both in Morocco. Ryanair has announced that it will add three new routes this April – to Murcia, Corfu and Venice (Treviso).

Apart from Ryanair, the airport is also served by KLM’s low-cost subsidiary Transavia.com, which offers a growing network of destinations across Europe.

The last recognised ‘full-service’ carrier to serve the airport was CityJet, which operated flights to London City Airport until the end of March 2013.
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Comfort, technology, flair – and Swissness

The SwissCanonica Group has been involved in F&B outlets and airline catering in Geneva International Airport since 1948, where the quality of its services has led it to operate multiple points of sale. In 2013 Canonica established two new F&B outlets at Basel-Mulhouse-Freiburg Airport.

Whether under its own name or as a franchise, the group develops new airport catering and hotel concepts. The array of brands it has developed allows the group to cover demand in all areas, from bars and shops to restaurants. It manages a new hotel called SwissEver – the new stylish hotel located in the middle of one of Switzerland’s most beautiful areas. SwissEver offers extended comfort, technology and flair – all with Swissness.

In 2011 Canonica opened its own top-of-the-range chocolate factory with its own laboratory. The group runs a chocolate shop at Geneva Airport and intends to expand the brand. In November 2013, its chocolate won first prize in the Geneva international chocolate show. Today the SwissCanonica group employs 500 people, and has an annual turnover of $60 million.

Innovative shopping app

Wingman is a global airport shopping discovery and price comparison app. Its mission is to empower travellers with the product and pricing information they need to find the best deals on anything from computers to cognac at airports around the world.

Travellers can search for products, plan purchases at each stop on their itinerary and even pre-purchase from e-commerce-enabled retailers for pickup on the day of travel.

For retailers and airports Wingman is a unique source of consumer data and a new highly targeted marketing channel. For the first time, airports and retailers can access consumer travel dates, purchase intent and demographics, and engage directly with highly qualified travellers before they even begin their trip. Drive online and in-store purchases with targeted communications on products, pricing, parking, accommodation and other travel related offers.

Wingman delivers for every audience. For travellers, it provides a unique opportunity to search for products globally and plan purchases ahead of travel. For retailers and airports, Wingman delivers highly qualified consumer data and a targeted communications channel to drive purchase decisions.

On the Wingman app travellers can search for products, plan purchases at each stop on their itinerary and even pre-purchase from e-commerce-enabled retailers for pickup on the day of travel.
Unwrapping confectionery’s mouth-watering potential

ANDREAS FEHR, MANAGING DIRECTOR, MONDELEZ WORLD TRAVEL RETAIL

As Mondelez World Travel Retail reaches its 20th year of industry excellence, its position at the forefront of the channel is the glacé cherry atop its globally growing cake. But cloying challenges still face the confectionery sector, as Andreas Fehr explained to Amy Hanna, and now Mondelez WTR’s indefatigable Managing Director is spearheading the brand’s vision to captain the “under-represented” category, and grow the market by a further $3 billion over the next three years.

“For us, our leadership position is not a given, but something we need to fight for every day,” Mondelez World Travel Retail’s Andreas Fehr said. The head of one of the industry’s leading companies, which counts globally renowned brands like Toblerone, Cadbury, Oreo and Milka among its diverse portfolio, is reflecting not just on the intense competition that faces brands within the confectionery category, but also on the battle to get the recognition deserved in travel retail.

Fehr joined Mondelez WTR 20 years ago when the travel retail division of Kraft Jacobs Suchard was formed, and rose to the helm of what was to become a formidable single entity in 1998, just months before the abolition of intra EU duty free in 1999. As he steered the company through these tumultuous waters, Fehr learned the importance of delivering a spectacular retail experience for the customer. And now, years later, Fehr is pioneering again with the Mondelez WTR mission to “make every traveller’s journey delicious”, and position its much-loved products in every single store in the channel.

‘Mondelez WTR’s grand design for obtaining great retail space is to combine the strongest portfolio in confectionery with our cutting-edge shopper insights platform. This allows us to consult retailers on how best to grow the overall category, and not just sales of our own products,” Fehr explained. “It is through this approach that Mondelez WTR aims to take on the mantle of ‘Category Captain’, in a development plan centred on opportunities to boost the entire confectionery sector. Typically confectionery is under-represented in airports compared with others such as liquor and cosmetics.”

This under-representation is surprising given the revenue confectionery generates in the space it currently occupies. With more room, confectionery brands could deliver an even richer experience and offer even greater engagement with travellers. “I firmly believe that each category has its role to play – whether it generates a carefully planned purchase or an impulse one. As the leading confectionery supplier in travel retail, Mondelez WTR sees its’ role to lead the way in raising awareness of the retailers and airport operators in the first place.”

Mondelez WTR believes it can grow the travel retail confectionery market by $3 billion over the next three years, merely by enabling retailers to adopt new store concepts and practices. Fehr’s strategy for this multi-billion dollar growth of the sector is to raise the retailers’ awareness of how such a universal, appealing and affordable category can overcome the industry’s biggest obstacles. “Effectively travel retail faces three challenges in trying to maximise sales – not enough travellers go into the shops, they do not spend enough when they get in there, and do not plan to shop every time they travel. It is our belief – backed up by our research and shopper insights – that confectionery can help airport retailers tackle all three challenges.”

Andreas Fehr

“Our partners take our brands to the consumers and are critical to our success in travel retail. One of the core strategies of Mondelez International is ‘Powerful Customer Partnerships’ – this means adding value to their businesses through consultation and investment.”
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*SUBWAY® is the #1 restaurant chain in total restaurant count with more locations than any other chain in the Quick Service Restaurant (QSR) industry.