“My vision is for DHMI to operate globally”

Interview: Serdar Yıldırım, Director General & Chairman of the Board, DHMI (General Directorate of State Airports Authority of Turkey)
Welcome to Vienna: Where we fulfil your heart’s desire. The city annually greets more than 13 million guests from around the world. It is here that culture enthusiasts, innovative minds and bon vivants alight in order to discover a city worth visiting, time again and again. This is a powerful recipe for success—and Vienna Airport is your host.
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OLIVIER JANKOVEC, DIRECTOR GENERAL, ACI EUROPE

Editorial: Ready to hear the old song again?

AIRPORTS IN THE NEWS

A snapshot of stories from around Europe

SERDAR YILDIRIM, DIRECTOR GENERAL & CHAIRMAN OF THE BOARD, DHMI

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AIRPORT CHARGES

Airport Charges back on the agenda. Again.

SESAR DEPLOYMENT

Major funding announced for ATM modernisation at key airports

AIRPORT CARBON ACCREDITATION

The year of going Global
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.
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Summer is ending and we can start looking back at some very good months for passenger traffic at Europe’s airports – with the notable exception of Russia. EU traffic has been performing particularly well, providing yet another indication that the Eurozone economies might finally be turning the corner. Despite suboptimal GDP growth and still significant downside risks, aviation is essentially benefiting from a rare moment of harmonious positives. There is little doubt that lower oil prices are an essential part of this equation.

In such circumstances, it is no surprise that several European airlines are seeing improved financials. To some extent, the gap seems to be widening further with those other airlines that are still struggling to adjust to new market realities. Yet, while their fates continue to diverge, Europe’s airlines have finally started to unite their efforts in Brussels – looking to speak with one voice to promote their interest with the EU. As I write these lines, a new European airline association is being set up, with the intention of replacing the patchwork of existing associations.

This move mirrors the convergence in business models across the airline industry, and it should help – in principle – reinforce the collective voice of aviation. It comes at a critical time, as the European Commission is preparing a new aviation strategy for Europe. Unfortunately, it also comes with renewed airport bash in relation to our charges. Upon announcing their joint effort, the CEOs of the top 5 EU airlines put forward their vision for aviation – a vision which relies heavily on the age-old plea for tighter regulation of airports and mandatory single till – essentially tarring all airports as uncontrolled monopolies. So much for a bold strategic vision and aviation’s collective voice.

Luckily, those portraying airports as monopolies are becoming a (well-known) minority. Airport competition is almost everywhere to see. Just look at the aggressive marketing and route development efforts that are now a must for every single airport across Europe. When it comes to airport charges, the facts are also blunt and unequivocal: charges paid by airlines and passengers only make up for 47% of total airport revenues. This means that airlines are widely subsidised by airports – leaving us with more than €3 billion in unrecovered operating costs each year.

Sadly, the resurgence of the airport charges agenda for Europe’s major airlines reflects their inability to find common grounds on other, more important issues, like Open Skies. It also hides its fair share of protectionism. Asking for lower airport charges is a nice way of keeping further airline competition at bay – as lower charges would curtail the ability of airports to invest to expand their facilities and address the capacity crunch we are facing. So much – this time – for Europe’s future connectivity, which is supposed to be one of the cornerstones of the Commission’s new aviation strategy.

Air connectivity has become the number one item on the lips of industry and decision makers in Brussels these days. ACI EUROPE has taken the lead in this debate through its Airport Industry Connectivity report – with the latest update just released last June at our Annual Congress, hosted by Prague Airport. We applaud the Commission’s intention to place connectivity at the heart of its aviation strategy. Hopefully, this will prompt a significant and much needed shift in aviation policy – from still largely airline-centric, to becoming truly consumer-centric.

As I write these lines, a new European airline association is being set up, with the intention of replacing the patchwork of existing associations.
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

Amsterdam Airport Schiphol
If average monthly growth continues, AMS will handle close to 56 million passengers this year.

Amsterdam Airport Schiphol has introduced 35 electric buses to transport passengers from aircraft to gate. The buses, which are powered at solar-panelled charging stations, have been designed in collaboration with the airport specifically for use at Schiphol. Each bus has its own charging point at the airport, making Schiphol the biggest charging station for electric buses in Europe.

Heathrow Airport
Has grown by an average of 1.8% each month (January-July) in 2015.

Heathrow has been named as the preferred site for expansion in the south east of the UK. The Airports Commission published the long-awaited report choosing a third runway at Heathrow on 1 July, but only if it meets stringent conditions on air quality, noise pollution and carbon emissions.

Milan Airports
Between January and July, Milan’s three airports (BGY, LIN and MXP) handled over 22 million passengers.

Radio communications at Milan’s Linate and Malpensa airports have been upgraded. The system will connect both of Milan’s airports to provide rapid flight turnaround and more efficient terminal operations. Old radios used by personnel throughout the airports were also replaced with new TETRA digital handsets.

Faro Airport
Handled over 3.5 million passengers between January and July 2015.

Faro Airport is set to undergo an extensive renovation programme in October. The €32.8 million project will increase the size of the complex from 81,200sqm to 93,120sqm, allowing ANA to expand and update the terminal’s retail, security and operational facilities. Work is expected to be completed in March 2017.

Eilat Airport
Announced three new routes with Ryanair this winter.

Two new connections at Eilat Airport were announced in the past months. Ryanair will begin flying to Eilat in southern Israel in November – its first-ever Middle Eastern connection. The low-cost carrier will serve the city from three points in Eastern Europe: Budapest, Kaunas and Krakow. In addition, El Al, Israel’s flag carrier, added Boston to its American network.
Athens Airport
Average monthly growth in 2015 has been over 23%.

Aiming at providing accurate and instant information to the public, Athens International Airport is the first internationally to introduce a new e-application: 'ATH Messenger'. By simply logging into Facebook Messenger through mobile, tablet, or laptop, all users can receive live flight information, using hashtags (#) and special key words (e.g. flight & code number).

By sending a Facebook message and keyword to the inbox of the new page www.facebook.com/ATHmessenger, users will receive relevant information and updates on flights they are interested in.

Helsinki Airport
So far in 2015 (Jan-Aug) Helsinki Airport has handled nearly 83% of all passenger traffic in Finland.

Finland’s Helsinki Airport is planning a major expansion programme aimed at enhancing its facilities and services to help accommodate the future increase in passenger numbers. Starting in early 2016, Finavia will construct an additional south wing to the airport’s non-Schengen gable. A new west wing will be built later. The airport plans to initiate the extension of its existing Terminal 2 building, as a part of its €900 million development programme introduced in 2014. The terminal extension is likely to be completed by summer 2020.

Stockholm-Arlanda Airport
Handled over 13 million passengers between January and July 2015.

Stockholm-Arlanda Airport has developed a weather simulator called the Climate Portal. Located in Terminal 5, it contains three rooms simply named 'Hot', 'Cold' and 'Big'. They use heaters, air conditioners, fans, misters and audio-visual aides to provide holidaymakers with a taste of the weather they can experience abroad. The rooms are connected to online weather services whose data are transformed into a physical experience on the concourse.

Domodedovo Airport
Has been overtaken this year by SVO to become the biggest airport in Russia.

A new segment of the passenger terminal was opened at Moscow Domodedovo Airport in May, serving international passengers. The atrium is the largest object of the type in Russia’s transport industry. The area of the eastern part of the airport terminal was increased by more than 6,000sqm.

Avinor
Norway's airports handled nearly 55 million passengers in 2014, so far in 2015 (Jan-Aug) 36 million passengers have been processed.

Norway’s Avinor has deployed a new air traffic management system to handle increasing en route traffic in the North Atlantic. The new system is scalable and tailor-made to handle air traffic services in oceanic areas and can now provide customers in the NAT region with new and improved services, compliant with NAT region requirements and EU Implementing Rules. It also allows a high level of automation in the communications between flight crews and air traffic controllers with datalink services.

Compiled by Inês Rebelo.
“My vision is for DHMI to operate globally”

SERDAR YILDIRIM, DIRECTOR GENERAL & CHAIRMAN OF THE BOARD, DHMI (GENERAL DIRECTORATE OF STATE AIRPORTS AUTHORITY OF TURKEY)

Serdar Yildirim assumed his role as the leader of DHMI in March of this year and straight away he went on the record: “I’m an idealist.” Paul Hogan recently went to his office at Istanbul Atatürk Airport to find out what he meant by this. The answer was a surprise...

There are a lot of things I would like to do – DHMI is a sleeping giant. We have got great expertise, the giant should be awakened. It’s time we took our potential outside of the borders of Turkey. My vision is for DHMI to operate globally.”

This might seem like a surprising aspiration for the boss of Turkey’s publicly owned airport network. After all, his airports have much to do at home to cope with persistent growth. But Yildirim believes that this success has great relevance for its potential partnership with airports elsewhere in the world.

Turkish airport growth: How fast, how big?

Turkish airport traffic in the period to end-August was up 9% again, suggesting it will handle over 180 million passengers by end-2015. By comparison the French airports handled 149 million in 2014 and only the UK (241 million) and Germany (208 million) were bigger markets last year.

Having already passed Amsterdam Schiphol in the last year, Istanbul Atatürk’s traffic is also up 9% this year. Indeed, it will most likely pass 62 million in 2015, possibly pushing Frankfurt out of third place in Europe – Frankfurt may just stay ahead
DHMI is the sovereign landlord of all 55 airports in Turkey. Most of these are directly controlled and operated by DHMI (employing 10,000 staff) although the country’s key airport terminals are managed under concession agreements through Turkey’s highly successful Public-Private Partnership (PPP) model, strongly implemented from the late-1990s onwards.

**DHMI’S KEY CONCESSIONS:**

**Istanbul New Airport:**
Opening in 2018, this 25-year concession was secured with a record €22.2 billion bid in 2013 by İGA Havalimanı İşletmesi A.Ş., a consortium of five major Turkish construction companies. Currently under construction, the €10.2 billion mega-hub has been designed for phased expansion to 250 million passengers and six runways.

**Istanbul Atatürk Airport:**
Operated by TAV Airports, which in turn is 38% owned by Aéroports de Paris. In Turkey TAV also operates the capital city airport, Ankara, and others serving key cities and tourism centres at Izmir, Gazipasa-Alanya, and Bodrum.

**Istanbul Sabiha Gökçen Airport:**
This 20-year air terminal concession, expiring in 2028, is wholly-owned by Malaysian Airports. The airport rose from an insignificant 245,000 passengers a decade ago to exceed 25 million this year. DHMI is building a second runway, opening by 2018.

**Antalya Airport:**
Turkey’s second-biggest airport (although soon likely to be overtaken by Sabiha Gökçen). The terminal concession, ICF Airports, is a joint venture between Fraport and Turkey’s IC İçtaş, maturing in 2024.

with a projected 62.3 million passengers, but it is going to be a wafer-thin, and probably unsustainable, lead.

The top positions of London Heathrow and Paris-CDG are not secure either: One of the largest airports in the world is being built in Istanbul, which will join the new breed of world-dominating mega-hubs, along with Beijing’s Daxing and Dubai World Central Al Maktoum Airport (DWC), new hubs which have emerged from new economies to challenge 60 years of pre-eminence by the big hubs of the US and Northern Europe.

So why should DHMI make a move into the international arena, and where does Yildirim see this international expansion taking place? “It’s about a real opportunity that DHMI and the Turkish airports industry have to take to export and globalise – it’s precisely a logical progression from the strong growth of Turkish airports and of Turkey as an important economic power, and not something niche or separate.”

“The first target is Africa”

Yildirim has a long list of potential markets where DHMI could ultimately lead Turkish investment and airport export expertise, including the Middle East, Latin America, Russia, and Asia: “There is huge potential for DHMI in these markets.” But Yildirim’s initial focus is unexpected: “The first target is Africa, there are
huge opportunities there… our scope is on Africa, and African attitudes to the presence of DHMI, and its Turkish partners, is very good.”

Indeed, Yildirim’s vision of DHMI’s role in Africa is not something ‘happening’ in a vacuum. He references a whole range of Turkish Government initiatives and Turkey’s rising role in Africa in which DHMI is clearly emerging as a strategic leader, along with the presence of Turkish Airlines, which has just announced its 45th destination in Africa – more than any other non-African airline.

“Both the government and Turkish society have long had strong African initiatives which have been enthusiastically embraced in business circles. I plan to travel with the Prime Minister and President of the Republic on missions to Africa. Our goal is to take airport partners in several countries.”

Yildirim directly tackles the financial challenge in confident, practical terms: “Many African states cannot afford to modernise their airports, our idea is to use the PPP model which has been so successful in Turkey – they won’t have to pay a penny for new airports, while our desire is to operate concessions with our local partners for up to 30 years. We have massive capabilities – we are planning to finish Istanbul New Airport in only three years. We know how to make successful joint ventures, and all the indicators are that African attitudes to our presence are good.”

In order to pursue its international objectives Yildirim explains: “We need to change some of the statutes governing DHMI to work in other countries. Meanwhile, efforts are underway to establish an international team in

**DHMI: Cemented to Turkey’s rising role in Africa**

Turkey’s rising role in Africa is deeply embedded in the Turkish political and economic sectors. In modern times it has a recognisable starting point in the mid-1990s and today the Turkish Foreign Ministry asserts: “Africa constitutes one of the prime orientations of Turkish foreign policy. As an Afro-Eurasian state, Turkey’s opening up to Africa is not just the reflection of a transient political and economic expectation, it is the product of a process with strong historical and cultural aspects.”

- Five years ago there were only 12 Turkish Embassies in African countries, including five concentrated in North Africa. Now there are 40 embassies.
- Turkish Airlines’ route expansion – it now serves more African destinations than any other foreign carrier (45 cities, plus 10 dedicated freighter destinations).
- Bilateral trade is approaching $25 billion, over one-third with Sub-Saharan Africa, a 10-fold increase since 2000.
- The African Union has declared Turkey as a “ground-breaking strategic partner”.
- Visitors to Turkey from Africa have risen more than five-fold from 200,000 10 years ago, to a likely one million this year.
- Turkey is the fourth-largest global donor to Africa, disbursing some $1 billion, rising to $2 billion with the contribution of Turkish NGOs.
- Benefiting projects include the new terminal for Mogadishu’s Aden Adde International Airport, which was inaugurated by Turkey’s President Erdoğan in January.
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DHMI. One of the tasks is to obtain an ICAO training certificate, although, for the time being, DHMI is considering a partnership with daa, the Dublin and Cork airports operator, which does have this qualification.

“DHMI’s globalisation is going forward, we are going to take this opportunity. In looking to export internationally, the quality and expertise of our 10,000 people is good – the ‘globally yours’ motto of Turkish Airlines is a good one and also describes the global presence that DHMI fully intends to emulate. We have proved we can do a lot of things in terms of airport management. Furthermore, the capabilities of the construction companies of Turkey are now among the fastest and best in the world.”

In this respect Yildirim welcomes the IGA-hosted ACI Airport Exchange in Istanbul, 8-10 December. “It will serve as a platform and shop window for Turkey’s substantial airport development, construction and management capability.” (Yildirim was commenting just days after Limak, a leading partner in Istanbul New Airport, announced it had won a $4 billion tender to build a new terminal at Kuwait International Airport.)

“I want a system of eight runways in Istanbul”

In a year when Turkey has again been very much in the news, Yildirim says both the airports and the Turkish economy have yet again shown great resilience (as they have throughout the many challenges faced since 2000, since when Turkish GDP has trebled to exceed $1.5 trillion). “I’m optimistic Turkey’s brand name is going up, and our increasing traffic proves this assertion. We had some disadvantages in the past, in the 20th Century, but now we have self-confidence. The logic behind Istanbul New Airport is because the centre of gravity in aviation has shifted south and east. We must constantly prepare for this, so, in addition, a second runway will be ready at Sabiha Gökçen Airport within 2.5 years. I want a system of eight runways in Istanbul because growth in the next 10 years will be much like the last.”
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Airport Charges back on the agenda. Again.

The Aviation Package is a collection of new initiatives – mainly legislative – which the EC will announce publicly towards the end of the year. The details remain unconfirmed, but examples of initiatives are likely to include the regulation of drones, the further liberalisation of the aviation market with new third party countries, and so on. This will also be accompanied by a strategy document, which will lay out a plan for the aviation sector for the remaining 4 years of the current EC’s mandate, and this is probably where airport charges is most likely to feature.

To those who follow the topic closely, it may at first seem surprising that airport charges should be back on the agenda at all.

The implementation of the current European legislation – the Airport Charges Directive – was the subject of a detailed report and communication by the Commission, published as recently as May of last year. Indeed, the Commission concluded that it was ‘too early to draw definitive conclusions on the impact of the Directive due to its recent entry into force’ (The Directive had to be implemented by 2011). In addition, a forum on national airport regulators, known as the Thessaloniki Forum, was set up at the same time to help strengthen the application of the current Directive across the Union.

Since then however, the airlines have been very active at a political level, most prominently in June of this year, when the CEOs of the 5 major airlines – Air France-KLM, British Airways, easyJet, Lufthansa and Ryanair – held a joint conference in Brussels to lobby on a select few areas of European aviation policy, with airport charges front and foremost. This was accompanied by the announcement that a new consolidated airline lobby group would be formed in Brussels. On charges, the chief demand of this new grouping is that the ‘single till’ approach towards calculating airport charges be imposed upon airports at a European level. This would mechanically transfer to the airlines all the profits that the airports generate from their commercial activities such as retail, car parking and advertising.

Some big name airlines have been heavily campaigning for more regulation of airport charges and as the European Commission (the EC) is working hard to finalise its forthcoming new ‘Aviation Package’ it looks increasingly likely that airport charges is going to be one of the policy issues which will be addressed by the Package, in some shape or form.

Donagh Cagney, Economics Manager at ACI EUROPE, reports.
In parallel, individual airlines and associations have also been campaigning on both a European and national level, and have their own additional demands, such as the abolition of specific charges for transfer passengers or the extension of the Directive to airports with less than 5 million passengers per annum, for example.

The subject of airport charges has always been a divisive one. In recent years ACI EUROPE has tried to take a progressive position, focusing on moving forward the debate and finding more sustainable and cooperative ways of working between airports and airlines. Much of this work has focused on the role of airport competition, and how regulation could best operate in this evolving environment.

A core ACI EUROPE position is that market power tests of individual airports should be performed, to better understand the relative negotiating power of an airport vis-à-vis its airline clients. Regulation should only be imposed where it is found that competition is not effective. And regulation should be proportionate to the degree of market power of the airport.

This is a balanced, reasonable approach. And it is common sense. Why prescribe a medicine before diagnosing the illness, or before even establishing that there is an illness in the first place?

Of course this approach won’t resolve all the differences between airports and airlines, but it will offer an objective and neutral means of driving the debate forward, instead of the endless cycle of recrimination and subsequent uneasy peace that seems to engulf the sector periodically. And recent history has shown that when such tests demonstrate that an airport is subject to sufficient competitive pressures, airlines have proven themselves to be very quick to adapt to the new reality, putting aside politics and signing up to commercial contracts with the airport, which itself offers additional benefits to passengers and the industry.

Sadly, despite some initial lip service in favour of this approach in principle, airlines have since strongly retrenched. There may still be a stated support of airport market power tests, but if so it is coupled with a carefully honed absence of curiosity as to what those tests might actually reveal. When the 5 main airline CEOs made their joint press release back in June, none of their statements nor the airline’s positioning on the nature of the regulatory till is a case in point. This debate has been in existence for over a quarter of a century. The arguments for and against the merits of the single and dual till are a mix of practical and philosophical, and are entirely predictable, having not changed substantially in the intervening years. The debate has a single zero sum question at its heart – ‘who gets the money?’ It is tired, inherently divisive, and its primary achievement has been to help the careers of airport and airline policy staff, regulators and consultants. Meanwhile, more fundamental policy challenges are left by the wayside.

If the regulatory till debate comes up again, ACI EUROPE will dust off and put into use the usual arguments in favour of the dual till and against the single till. But we really hope that we won’t have to. Airline arguments about airport charges are also being skilfully blended with long-standing statements about the losses which some sections of the airline industry incur. Best encapsulated in ‘Value Chain’ treatise. This philosophical approach suggests that airline losses be compensated with airport profits. This perspective gently skips over the question as to whether it really is sound policy to take profits from successful (and often publically-owned) companies to prop up (often privately-owned) failing companies. It instead proposes a never-ending bail-out of loss making companies without ever fixing the underlying problem. It also nicely sidesteps the awkward question as to whether this is really fair on the travelling public.

Thankfully, this philosophy is increasingly being confronted by the unavoidable reality that some airlines are consistently able to make significant profits. These airlines have become the darlings of the stock market, despite having come from nothing and all while having faced the exact same policy and commercial environment as their loss-making counterparts. It demonstrates quite unambiguously that airport charges have nothing to do with the chronic unprofitability of some airline companies.

It’s nice to be right, but in politics that is rarely enough, and so ACI EUROPE has not been standing by idly in response to this airline activity. On top of ACI EUROPE’s existing work on the subject, there has been a briefing note on the regulatory till, a response to easyJet’s report, multiple meetings with European Commission officials and political figures, and letters to the Commission from individual airport operators, all aimed at helping decision makers get past the seductive but empty ‘airport monopoly’ and ‘value chain’ soundbites, and to instead actively think about the substance of the arguments being made.

This work will continue right up to the publication of the Aviation Package, and if needed, beyond. If your airport has its own views and experiences on this subject, please don’t hesitate to contact ACI EUROPE.

Major funding announced for ATM modernisation at key airports

The progress in SESAR deployment continues. 16 European airports that are in the scope of IR716/2014 will receive nearly €100 million of EU public funding for investment in ATC (Air Traffic Control) related operations. The first tranche of this funding is expected to be released early next year. Inês Rebelo reports.

The EU funding will help the 16 airports (12 airport operators and 16 ATC providers) to deploy ATM processes and technologies that will optimise their operations, thereby improving performance, capacity and safety. These airports are benefitting from EU funding through the SESAR Related Deployment Airport Operators Grouping (SDAG) GEIE. The SDAG legal entity is coordinated by ACI EUROPE and secures the participation of the airport operators in the SESAR Deployment Manager, the EU-mandated body tasked by the European Commission to plan and coordinate the modernisation of Europe’s ATM network.

The first call for the Connecting Europe Facility (CEF) grants for funding the implementation projects closed on 9 March 2015 for an overall public funding of over €300 million. A total of 29 projects were submitted by airport operators, 24 of which were selected by the European Commission to receive around €35 million of EU funding. There were additionally over 30 airport related projects by Air Traffic Control (ATC) providers, which were also selected. All these projects are related to Performance Based Navigation operations (PBN) and Airport Integration and Throughput. The latter encompasses Airport Collaborative Decision Making (A-CDM), Initial Airport Operational Plan (AOP), Advanced Surface Movement, Guidance and Control Systems (A-SMGCS), Time-Based Separation (TBS) and Airport Safety Net.

The €100 million of EU funding for airports will be allocated to several players, thereby benefiting a diverse set of locations, as well as the network as a whole. “The ATM call Part A, which consists of projects that comply with the IR716/2014, will deliver nearly €28 million direct co-funding for airports and SDAG. There is €3.5 million additional direct co-funding in the ATM call Part B, which comprises projects that are outside the Deployment Plan. In addition, €4.8 million will be made available for Luftfattseverket, the Swedish ANSP, for Remote Towers Services (RTS) pilot operations and €63.2 million will be invested in airport platforms,” Luc Laveyne, Managing Director, SDAG and Senior Advisor for ATM and SES at ACI EUROPE, explains.

A second call for the CEF funding is due to be launched in November with – expected – the double amount of public funding available for projects that fit in the Deployment Plan, compared to the first call. The European Commission (EC) is apparently considering using the Cohesion funds regulation framework to put more public funding on the table for the following 15 EU countries: Bulgaria, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia and Slovenia. These countries might get up to 85% of public funding.

“ACI EUROPE will firmly encourage all airports to make a joint compliance plan with their ATC provider and to submit projects in due time in order to be given access to this funding. We will also give our support to the EC’s mooted plan to include airport operators in the Cohesion Fund scheme. Naturally, we will also seek to help these airports to submit projects, again in good consultation with their ATC provider,” says Laveyne. Projects for the second call are expected to be submitted by the end of March 2016.
The countdown for the 21st Session of the Conference of the Parties to the United Nations Framework Convention on Climate Change (COP21/CMP11) is underway. From 30 November to 11 December 2015, nearly 50,000 participants including 25,000 official delegates from government, intergovernmental organisations, UN agencies, NGOs and civil society are expected to participate in COP21. And the event will take place on the site of Paris-Le Bourget Airport.

This event is the most important international climate conference that aims to facilitate consensus on climate negotiations and to make decisions on relevant targets to combat climate change. This year, in particular, the goals are quite ambitious: COP21 aims to achieve, for the first time, a universal, legally binding agreement on climate change, including limiting global warming to below 2°C. The last time there was this much pressure to achieve a resolution was COP16, held in Copenhagen in 2010. It’s no coincidence that this year we find ourselves in Europe again. Europe is a recognised driver of environmental progress.

Climate change has for some time now been a key priority on the radar of the airport industry. The industry has pursued a two-pronged approach – 1. Aiming to reduce its impact on the environment, by lowering its carbon emissions; 2. Aiming to reinforce its resilience to the impact of climate change, including limiting global warming to below 2°C. The emphasis on addressing its carbon emissions, the programme is live in all world regions, from Europe, Africa and Asia-Pacific to North America and Latin America & Caribbean. What does this mean in practice?

Airports across the world are now collectively more empowered to tackle climate change by adopting Airport Carbon Accreditation as the industry reference standard for mapping, reducing and ultimately neutralising their carbon footprint. The efforts of participating airports on reducing their carbon emissions are measured in accordance with the World Resources Institute GHG Protocol and their emissions inventory are verified each year by an independent third party, according to four different progressive levels of accreditation: Mapping, Reduction, Optimisation and Neutrality. Each of these levels determines the stage at which airports are in their attempt to reduce their carbon emissions.

If the global scope of the programme shows the relevance it has managed to gain since its origins, figures also constitute a meaningful barometer of its ongoing success. As it is mentioned in the full Airport Carbon Accreditation Annual Report 2014-2015 at the end of June 2015 (end of Year 6 of the programme), 125 airports in over 40 countries across the world earned the Airport Carbon Accredited status – an increase of over 22% on the previous year. And it’s worth bearing in mind that last year 4.7 billion passengers travelled through these 125 airports. In the past year, 24 airports managed to become Airport Carbon Accredited for the first time and 22 airports successfully moved up a level of the programme, proving that they are making further progress on the way they address their carbon emissions. In the past year, these airports have succeeded in reducing the CO₂ emissions under their direct control by 212,450 tonnes of CO₂.

**The year of going Global**

**Airport Carbon Accreditation** established by ACI EUROPE in 2009 and independently operated by WSP | Parsons Brinckerhoff, an international environmental consultancy appointed by ACI EUROPE to enforce the accreditation criteria for airports on an annual basis. In 2013, the programme was selected by the European Union as one of the top 3 initiatives to build a low carbon economy.

So, with climate change now well and truly back on the political agenda, it is perhaps pertinent and very timely that we report on the airport industry’s latest efforts on addressing its carbon emissions under Airport Carbon Accreditation.

**Building on its success**

A little over six years after its launch in 2009, following the airport industry’s commitment to reducing its carbon emissions, the programme is live in all world regions, from Europe, Africa and Asia-Pacific to North America and Latin America & Caribbean. What does this mean in practice?

Airports across the world are now collectively more empowered to tackle climate change by adopting Airport Carbon Accreditation as the industry reference standard for mapping, reducing and ultimately neutralising their carbon footprint. The efforts of participating airports on reducing their carbon emissions under their direct control by 212,450 tonnes of CO₂.
A growing number of airports are eager to take the lead on implementing best practice carbon management processes. This is visible in the past three months with the increase in the number of accredited airports. Since June 2016, when there were 125 certified airports, as aforementioned, 4 new airports have joined Airport Carbon Accreditation: 3 Latin American airports (Galapagos Ecological Airport, Quito International Airport and Tijuana International Airport, Level 1 Mapping) and 1 North American airport (Dallas Fort Worth International Airport, Level 3 Optimisation). As such, a total of 129 airports are now certified by the programme, which translates into 92 currently certified airports in Europe, 25 in Asia-Pacific, 7 in North America, 4 in the Latin America & Caribbean region, and 1 in Africa.

There is no doubt that Airport Carbon Accreditation keeps gaining momentum and has become a key instrument of global airports’ sustainability strategy. It continues to win endorsement and support from key institutional bodies such as the International Civil Aviation Organization (ICAO), the United Nations Environment Panel (UNEP), the European Commission (EC), the European Organisation for the Safety of Air Navigation (EUROCONTROL), the European Civil Aviation Conference (ECAC), and the United States Federal Aviation Administration (FAA).

In recognition of the importance of the programme, EU Commissioner for Transport, Violeta Bulc, said: “With substantial CO₂ reductions achieved already, Airport Carbon Accreditation is a fine example of industry-led action that is helping move aviation onto a more sustainable footing.”

**From regional to Global**

Airport Carbon Accreditation has seen a rapid and solid evolution over the past 6 years as a result of the airport industry’s commitment to carbon emissions reduction. Its progressive extension to airports in the different ACI regions culminated in a historic milestone last year: The programme has attained global status, showing that airports are effectively working together across the globe to increase sustainability.

2009 marks the beginning of the story when Airport Carbon Accreditation was launched in Europe. In November 2011, it was extended to airports in the Asia-Pacific region where Abu Dhabi International Airport became the first certified airport at Level 1 Mapping. Two years later, the programme lifted off in Africa where Enfidha Hammamet International Airport, in Tunisia, is setting the example to its African counterparts. The airport joined the programme at Level 1 Mapping but upgraded to Level 2 Reduction last year, proving that it is making further progress on reducing its carbon emissions.

Another milestone was achieved in September 2014. Airport Carbon Accreditation was extended to airports in North America with the accreditation of Seattle–Tacoma International Airport at Level 2 Reduction. Just a little more than a year after the launch of the programme in this region, a total of 7 airports have already been certified.

The programme took the decisive step in becoming the global standard for carbon management at airports when it took off in Latin America & Caribbean in November 2014 with the accreditation of Puerto Vallarta International Airport at Level 1 Mapping. In the meantime, this airport has successfully reached Level 2 Reduction. To date, 4 Latin American airports have gained the Airport Carbon Accredited status, showing that participation keeps growing steadily in this region.

The global presence of Airport Carbon Accreditation is now represented by 129 airports that correspond to nearly one-third of global passenger air traffic.

**How airports are reducing their CO₂**

Airport Carbon Accreditation is empowering airports to address their carbon emissions and airports are testing new and innovative ways to reduce their impact on climate change. As the majority of carbon emissions at an airport come from energy use, from fuel burnt in boilers, generators and vehicles and power imported from external sources, airports are putting focus on carbon emissions reductions delivered through energy consumption reduction, as illustrated by the examples below.

In an attempt to become more energy-efficient, London City Airport has installed solar-powered lighting systems at runway entry points that provide a 24-hour LED warning system. The units can run for 120 days without re-charging.

In the case of Amsterdam Airport Schiphol, the airport deployed 35 electric buses that are charged with their own solar panels. The buses, which transport passengers from terminals to aircraft, are supposed to improve the airport’s air quality in addition to reducing its CO₂ emissions. Also, Schiphol has recently streamlined its cargo operations via the ‘Milk Run’ concept, a system that aims to consolidate multiple inbound trips into a single delivery from the handling agent to several forwarders’ facilities. This means that fewer trucks at and around the airport are needed, which is already a reality: The number of trucks used has been reduced by 30% so far.

At Dublin Airport, daa is investing in new lighting and revised Air Handling Units (AHUs, which control ventilation and air conditioning). Overall, these two projects will save over 1GW of electrical energy per annum, enough to power 750,000 homes for a year.

Another two good examples in Europe are Helsinki Airport and Budapest Airport. The former improved lighting at its car park P5 by replacing 2,100 old light fixtures with Philips LED lighting, controlled by...
means of motion sensors. As a result, energy consumption decreased by 85%. The latter, amongst other things, renovated the airfield ground lighting systems of the runways. It also installed a system of solar collectors on the roof of Terminal 1, which is able to provide hot water for the entire terminal.

In North America, Seattle-Tacoma International Airport reduced total terminal electricity consumption by 7% in recent years. This was done by converting constant volume air handlers to variable volume, upgrading to more efficient lighting and escalators, optimising chiller sequencing, and main terminal airspace heat recovery.

In the Asia-Pacific region, Sydney Airport is investing $128 million in airfield and terminal infrastructure to accommodate fuel-efficient aircraft and it introduced a new lighting system in the T2 car park, which reduced energy usage there by 30%.

These are just a few examples of the environmentally friendly endeavours that airports are making to address their carbon footprint, but they are representative of how the airport industry is proactively contributing to the decarbonisation of the environment. Ahead of the COP21 conference in Paris in two months’ time, the airport industry is sending a clear and credible signal to environmentalists, world leaders and to the whole society that it is taking seriously the role it plays in fighting climate change.

The EU Commissioner for Climate Action and Energy, Miguel Arias Cañete, has already recognised the airport industry’s engagement in curbing carbon emissions: “It is reassuring to see an industry as visible and strategically relevant as the airport industry proactively addressing its carbon emissions. By allowing airports to work their way through 4 levels of certification, Airport Carbon Accreditation bridges their individual efforts and their collective achievement as an industry. With airports playing host to so many other companies, the past 6 years have shown that the programme is also having a halo effect on them, as airlines, air traffic controllers, retailers, passengers and surface transport also get involved to lower their CO₂ emissions on the airport site. I congratulate ACI on the momentum they have achieved with this – bringing an industry-led climate change initiative which began here in Europe all the way to becoming the global standard.”

Such recognition comes at a time when Cañete and world leaders are preparing the global climate talks in Paris, which aims to adopt a new global climate change agreement. In August 2015, Cañete urged world leaders to come forward with plans for a deal that should include a five-year emission target renewal and a long-term goal to collectively reduce global emissions by at least 60% by 2050 and be near zero or below by 2100. This is meant to achieve carbon emissions reduction and to meet the target of keeping the global temperature rise under the 2°C threshold. On 18 September 2015, EU Ministers adopted the COP21 position and promised to reduce emissions by at least 40% compared to 1990 levels, as well as to pursue emission target reviews every five years.

While we are waiting for a new agreement in Paris, airports will keep doing their part and advancing with their actions to become more and more sustainable.

Stay informed
The latest news on Airport Carbon Accreditation is just one click away. To get up-to-date information on the recent developments in the programme, visit www.airportcarbonaccredited.org and follow us on Facebook and Twitter @AirportCO2.

Also, check out www.airportCO2.org – the special interactive website with stylised maps and key figures from this year’s Annual Report that we have created to promote this year’s annual results.

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One airport. One process. One partner.
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At the 25th ACI EUROPE General Assembly, Congress & Exhibition, held in Prague in June, Augustin de Romanet, Chairman & CEO of Aéroports de Paris, was elected President of ACI EUROPE. He succeeds Arnaud Feist, CEO of Brussels Airport Company, who served a two-year term in the role.

“I am honoured to take on the role of President of ACI EUROPE. Recent years have shown that the air transport sector must face multiple challenges and we need strong representation among policymakers and regulators at the European level,” de Romanet commented. “ACI EUROPE is a unique source of technical and legal expertise for our industry, and an exceptional facilitator in the exchange of knowledge and influence, which we must continue to develop. My priority will be to meet two major challenges: To enable Europe to capture global traffic, that is on the rise; and to develop the competitiveness of our airports in the face of competition from the other continents.”

Augustin de Romanet, Chairman & CEO of Aéroports de Paris, has been elected to lead ACI EUROPE as President. His election took place at the 25th ACI EUROPE General Assembly, Congress & Exhibition, held in Prague in June.

Thomas Langeland RIP

It was with great sadness that we learned the very upsetting news of the sudden death of Thomas Langeland after participating in a sports event on 1 August. Thomas was well-liked among his peers in the European air transport industry. He will be remembered as genial and intelligent company – a cosmopolitan person who seemed to live out that passion for the international scene and multiculturalism, through his work in the airport business.

For us at ACI EUROPE, he will be especially remembered given his active involvement in the Regional Airports’ Forum, of which he was Chair for two years. Within the Forum, he was always conscious of the latest policy angles, but he also looked beyond the local and regional to underline their fundamental role in bringing the world to a city’s doorstep. He had an innate understanding of the power of air transport as a force for positive change and never seemed to become casual or cynical about that. For all of that and more, he will be missed.

Thomas’ death is a big loss to his family, his peers, AVINOR and the whole airport community. European regional airports will miss a champion of their cause and above all, a dear friend.

Karl-Heinz Neumeister RIP

On 21 July, Association of European Airlines announced the passing of its former Secretary General, Karl-Heinz Neumeister, a legend of the old guard in aeropolitical circles in Europe. Mr Neumeister joined AEA from a senior post in Lufthansa in 1983 and headed the Association until 2002. During his period of office, the European airline industry was totally transformed, from a highly regulated structure of nationally-owned and protected ‘flag carriers’, to today’s competitive market.

During the period of transition in Europe, Neumeister’s AEA was heavily involved in advising the policy-makers and instrumental in shaping the liberalisation process. Karl-Heinz Neumeister, both personally and through the organisation which he fashioned and led for 19 years, will be remembered as a significant contributor to the development of the European airline sector. Although there were points on which ACI EUROPE and AEA would occasionally differ, he was someone who was always ready and eager to collaborate with ACI EUROPE where possible.
ACI EUROPE promotes Open Skies

Open Skies and connectivity were high on the agenda at the ACI EUROPE General Assembly, Congress & Exhibition in June in Prague, not only because there was a special session dedicated to the subject, but also because both topics were the heart of Mr. Arnaud Feist’s speech (outgoing President of ACI EUROPE & CEO Brussels Airport Company).

Following ACI EUROPE Director General Olivier Jankovec’s presentation on the state of the industry, Arnaud Feist took the stage to present the priorities and views of the airport industry on the new Aviation Strategy the European Commission is currently working on.

Mr. Feist also announced the release of a joint position on Open Skies by ACI EUROPE and the European Travel Commission (ETC – representing National Tourism Organisations). This position underlines the need to support connectivity by expanding Open Skies beyond Europe. Addressing the ongoing public debate on the expansion of the Gulf airlines in Europe and the US, Feist was very clear: “Open Skies and fair competition need to go hand in hand. But Europe’s airports and Tourism Organisations do not regard the public financing of airport infrastructure, start-up aid for airlines and more favourable fiscal regimes as necessarily involving unfair competition – but rather as legitimate economic development policy choices, made by the Gulf States.”

Referring to the position the European airlines attacking their Gulf competitors, he added “These (European) airlines are our long time partners. For many of us, their fate is also our fate. They are right in saying that the expansion of the Gulf airlines and of the Gulf airports is a fierce challenge for European aviation. But the issues they raise and the remedies they propose are the wrong ones. This is not so much about how the Gulf States are nurturing their aviation sector and nor should it be about closing our market. Rather, this is primarily about how Europe is not supporting its own aviation sector.”

Addressing the EU Transport Commissioner Violeta Bulc, who was present at the event, Feist urged that the forthcoming aviation strategy include Open Skies and that connectivity & consumers should be the focus of the strategy. In addition to this joint position, ACI EUROPE and the ETC also signed a cooperation agreement to promote air connectivity and international arrivals in Europe.

European Airports & Tourism Organisations - Together on Open Skies: http://bit.ly/1FEEdFW.

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The joint position on Open Skies by ACI EUROPE and the European Travel Commission (ETC – representing National Tourism Organisations) underlines the need to support connectivity by expanding Open Skies beyond Europe.

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Airports and the Future of Tourism

25th ACI EUROPE General Assembly, Congress & Exhibition, Prague, 24-26 June

The 25th ACI EUROPE General Assembly, Congress & Exhibition, hosted by Prague Airport, took place on 24-26 June. The theme of this year’s event – “Airports and the Future of Tourism” – was a pertinent one, with tourism an area of key strategic relevance to both the airport and the city of Prague. The event attracted over 350 delegates from airports, airlines and ANSPs, as well as other aviation partners and the European Commission, including EU Transport Commissioner Violeta Bulc.

Importantly, the Annual Congress saw ACI EUROPE and the ETC (European Travel Commission) release a joint position on Open Skies, as well as announcement of the ACI EUROPE Best Airport Awards. Meanwhile, Augustin de Romanet, President & CEO of Aéroports de Paris, was elected to lead ACI EUROPE as President; he succeeds Arnaud Feist, CEO of Brussels Airport Company, who stepped down after two years as President.

The 26th ACI EUROPE General Assembly, Congress & Exhibition will be hosted by Athens International Airport on 20-22 June 2016.

EU Transport Commissioner Violeta Bulc delivered the first keynote address, in which she recognised that aviation is “an important driver of economic growth, jobs, trade, and mobility”. She added that “aviation is an important employment sector, contributing 68 billion to EU GDP.” “Aviation is vital to tourism, business, and the social cohesion of the EU,” Commissioner Bulc explained. “Aviation is central to the priorities of the European Commission – competition and growth. Airports play a central role in Europe’s connectivity. Citizens and businesses expect more and quicker connections. The EU has work to do to ensure we stay at the heart of world aviation. The time to deal with these challenges is now. Failing to act could see Europe’s position weakened in the future. We need to really work together.”

Michael Cawley, Chairman of Fáilte Ireland, the Irish national tourism development authority (and former Deputy CEO of Ryanair), gave the second keynote address. He was charged with answering the following question: “Airports are the gateways to Europe’s tourism markets, but most are also loss-making. Is this inevitable, or are there better ways?” Cawley said: “Be more like Dubai and integrate tourism and aviation policy – in Europe aviation is seen as a source of taxation, not as an economic stimulant, but it is my experience, as both an airline and now a tourism authority boss, that the downstream tourist spend benefits are 10 times the air fare!” He added: “These tourism benefits have to be recognised – the state aid rules [curbing airport support for new routes for example] are idiotic. They lead to airlines basing aircraft on the principles of different tax regimes in Europe, rather than on market decisions of where customers actually want to fly, it is completely inefficient.”

Olivier Jankovec, Director General ACI EUROPE, delivered his traditional State of the Industry address. He focused a number of areas, including an air traffic outlook, economic and financial performance, traffic concentration and airport competition, and airport business transformation. Air traffic significantly outperformed economic growth across Europe last year, as Europe’s airports welcomed an additional 160 million passengers, and record passenger traffic of 1.82 billion. “This summer certainly looks good, with airlines having adjusted their capacity to accommodate strong seasonal passenger demand. As economic conditions are set to keep improving in the EU on the back of the ECB’s stimulus programme and cheaper oil prices, this positive momentum for air traffic should persist in the medium-term, but the situation remains worrying for airports in Russia and Ukraine, where passenger traffic has declined – and more generally across Europe for freight traffic, where growth is anaemic,” Jankovec commented.

At the Annual Congress ACI EUROPE and the ETC (European Travel Commission) released a joint position on Open Skies (see article on p. 23). This position weakened in the future. We need to really work together.”

Arnaud Feist, CEO Brussels Airport Company and outgoing ACI EUROPE President, outlined the views of Europe’s airports on the forthcoming EU Aviation Strategy, in particular on the issue of Open Skies. He stressed the need for the EU to place air connectivity at the very heart of its new aviation strategy: “Policy-making in Europe needs to take stock of the increased strategic relevance of air connectivity for growth and jobs. Together with airlines and our other aviation partners, airports in Europe account for 4.1% of European GDP and nearly 12 million jobs. With the shift underway in the global economy to emerging markets, remaining connected and open for business is an absolute imperative for Europe. This is why Open Skies should be a no brainer,” Feist said.
The First Working Session examined 'What are the future tourism trends and forecasts?' Chaired by Ralph Anker, Chief Analyst, anna.aero, the session featured contributions from Augustin de Romanet, Chairman & CEO, Aéroports de Paris and incoming ACI EUROPE President; Eduardo Santander, Executive Director/CEO, European Travel Commission; David Scowsill, President & CEO, World Travel and Tourism Council; and Monika Palatková, Managing Director, CzechTourism. Key conclusions included the fact that people like to have holidays, even when times are tough economically; fuel is cheaper for airlines, so 2015 should be a good year for airlines and airports; and future travel growth is centred on Asia.

The Third Working Session focused on the role great hospitality plays in improving airport performance every day. The panellists were Dag Rusmasson, Chairman & CEO, Lagardère Services; Ralph Lassau, Director Real Estate, Stuttgart Airport; Yiannis Paraschis, CEO Athens International Airport; and Song Hoi-See, Founder & CEO, Plaza Premium Lounge. There was a consensus on the importance of the human element and a customer-centric culture in providing great hospitality.

The Fourth Working Session closed the conference in appropriate fashion, with insights into successful tourism strategies which transformed airports. Sharing their thoughts were Dirk Schaudziara, General Manager, JCG Airports; Vaclav Rehor, Chairman of the Board of Directors, Czech Aeroholding; Bjørn Oli Hauksson, Managing Director, Keflavik International Airport; and Stephanie Wear, Director of Economic Development & Aviation, Turismo de Tenerife. Topics discussed included the effectiveness of incentive programmes in attracting and supporting new routes, as well as increasing tourist numbers.

Open Skies was a hot topic at this year’s Annual Congress. It provoked much debate, not least in the conference session dedicated to the subject. The Open Skies Debate featured Matej Zakonjšek, Head of Cabinet of EU Transport Commissioner Violeta Bulc; David O’Brien, CCO Ryanair; Dominique Thillaud, Chairman of the Management Board, Aéroports de la Côte d’Azur; Karl Garnadt, CEO Lufthansa German Airlines; and Arnaud Feist, CEO Brussels Airport Company and outgoing ACI EUROPE President.


The Third Working Session addressed the compelling issues facing airports, as well as what can be done to ensure tourism growth is sustainable. Chaired by David Feldman, Managing Partner, Exambela, the panellists included Joël de Royal, CEO London Heathrow Airport; Sani Şener, President & CEO, TAV Airports Holding; Armando Brunini, CEO Naples Airports; Daniel Burkard, Deputy Airport Director, Non-Aviation Business Development, Moscow Domodedovo; and Julian Jäger, CEO & Member of the Executive Board, Vienna International Airport.

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Few initially took Dr Kotil totally seriously when, soon after his appointment as CEO in 2003, he began saying he was setting about: “Turning Turkish Airlines into the largest airline on Earth.”

But the fact of the matter is that the Star Alliance carrier has been the fastest-growing full service airline in Europe for a decade, adopting a unique hub and spoke strategy which cannot easily be copied by airlines to the north or south. As a result, it has contributed most of the rocketing growth which has taken Istanbul Atatürk Airport from an unremarkable slot in the traffic tables in the 1990s, to overtake Amsterdam Schiphol for fourth place last year, and to now threaten displacement of Frankfurt Airport from third-place in Europe in 2015.

Istanbul: Overtaking Heathrow’s hub

If Istanbul Atatürk were to continue to grow at 9% (as it has in 2015) and for London Heathrow to grow by the same 2% it is achieving (bearing in mind that the earliest a third runway will be built will be 2025), then Istanbul will overtake Heathrow in just three years, or exactly about the time Istanbul New Airport, the €10.2 billion mega-hub, is set to open. However, because of constraint at

“In this century, it’s our turn”

An interview with Dr Temel Kotil, General Manager and CEO, Turkish Airlines, President, Association of European Airlines. By Paul Hogan.

Dr Temel Kotil, General Manager and CEO, Turkish Airlines, is to be the keynote speaker at ACI Airport Exchange, 8-10 December, hosted by İGA Havalimanı İşletmesi A.Ş, the company building the new €10.2 billion airport opening in 2018.

Exceptionally this year, ACI Airport Exchange will also feature: “The 1st Istanbul New Airport Development Conference – The New Mega-Hub Shaping the Future of Aviation.” Eight İGA executives, including the Chairman and CEOs (of both the airport operating company and İGA Construction) are taking part in this special major conference stream, together with İGA’s most closely-held supply and consulting partners.

The theme of Dr Kotil’s paper is: “What are the global competitive implications of combining the world’s biggest airport with ‘the largest airline on Earth’? Istanbul New Airport is also the first entirely tailor-maker mega-hub – so will it also be a mega-carrier’s dream?”
Istanbul Atatürk, it is possible that Turkish Airlines’ growth could be squeezed, reducing this growth pace. But even then, it does not seem that the assumption of Istanbul having ‘Europe’s largest airport’ will be delayed much beyond 2020.

Of course Turkish Airlines’ ambitions are expected to be entirely served by being the primary customer of Istanbul New Airport when it opens in 2018, and which unsurprisingly Dr Kotil puts in the same “largest on Earth” category as he does his own airline: “The world used to be focused on Northern Europe and America. In this century, it’s our turn.”

Indeed İGA Havalimanı İşletmesi A.Ş (İGA)’s five-member consortium building the airport, maintains the same position, claiming that they are building a brand to rival Changi: “The most important hub between New York and Shanghai,” a statement which clearly overlooks the hubs of the Middle East Big Three (MEB3 – Emirates at Dubai, Ethad at Abu Dhabi, and Qatar Airways at Doha).

Kotil agrees that there are some competitive parallels with the MEB3 – notably the clear government support for the role of air transport in both the Turkish and Gulf economies, and how this translates into active support of the objectives of the airline(s), the airport(s), and the fundamental importance of tourism.

But the comparisons end there: Istanbul has a radically different place on the Southern tip of Europe making it much closer to its most important sources of feed. This five-member consortium Turkish Airlines services to use widebodies to steal feed from European hubs, and larger airports, but crucially to deploy its army of 737-800 single-aisle aircraft to a plethora of potentially hundreds of smaller airports of the size of Gothenburg and Friedrichshafen – airports which cannot viably be exploited for feed by Emirates widebodies.

The genuine success of this hub means that well over 50% of Turkish Airlines’ traffic at Istanbul Atatürk Airport is now transfer. However, Kotil also stresses that Istanbul – and Turkey – also have a much bigger O&D market than Middle East and other hub cities. He points out that Istanbul (pop. 14 million) and Moscow (12 million) are Europe’s “only true mega cities with populations rivaling those in Asia.” Kotil says this means the potential volume for O&D is “sky-high” compared to super-luxurious Dubai (pop. 2.3 million), and certainly just-overtaken Frankfurt (0.7 million), and even Europe’s great visitor magnets of London (8.5 million), and Paris (2.3 million).

Kotil enthuses: “Istanbul is an excellent mega city. It is not an eastern city, nor a western city, it is multi-cultural.” The number of tourist visits to Istanbul has trebled this century from four million to 12 million. With the Turkish economy four times bigger than it was in 2000, business and leisure passengers have plenty of reason to visit Istanbul and Turkey (pop. 75 million). Turkish Airlines is assisting this effect, even with the transfer passengers – those with a wait of six hours or more can now make the most of a free tour of Istanbul, turning those using its hub from people changing planes into real tourist dollar visitors to Turkey.

Africa surges; Russia underserved

Besides Europe, key feed markets increasingly include African cities, where Turkish Airlines has just announced its 45th destination – far more than any other foreign carrier. Indeed Turkish Airlines’ seems to have continued a taste for the single-aisle strategy in this market – even though MEB3 carriers would have an operational and cost advantage with 737/A320 types.

While Turkey’s membership of the EU now seems indefinitely stalled, in air transport terms Turkish Airlines’ access to the EU is more or less open (and reciprocated). However, elsewhere in Europe, especially the states of Russia and the Eurasian Economic Union (the Russian-led successor to the CIS) Turkish Airlines’ potential seems to have been curbed.

Indeed the 45 African destinations stands in stark contrast to the 10 current destinations in industrialised Russia, indicating a massive market which is being held back. Russian tourists are keen on visa-free holidays to Turkey but, due to restrictive bilateral agreements governing air services, they rely heavily on charter flights which generate good traffic statistics for Turkey’s airports, but obviously not the feed Turkish Airlines desires. “We obviously want to serve Russia more, and while there have been changes to the markets because of the Ukrainian situation, demand has compensated for the drops – Russia is an important opportunity, but it is difficult. It is going to be step-by-step. Nothing is impossible. Always possible!”

Istanbul Sabiha Gökçen: “We’re here to build a business”

So, with the Istanbul mega hub rising out of the ground, is Turkish Airlines’ need to start a base at Sabiha Gökçen in 2013 a big distraction which dilutes the strength of the fortress? “Sabiha Gökçen has its own catchment and that’s going to be extended by new high speed rail which will feed into other cities as far away as the Dardanelles, Bursa and İzmir. Turkey is building the best regional infrastructure in support of Sabiha Gökçen.”

Kotil explains that one of the key functions of the Turkish Airlines’ Sabiha Gökçen base is also positioned as a second project to link Europe to the Middle East. “We’re at Sabiha Gökçen to build a business, a stand-alone airline, we’ll have 40+ aircraft here next year. Then later we’ll have 100, and Sabiha Gökçen will reach 50 million passengers.” Consequently, Turkish Airlines will play a big role in the next chapter of Sabiha Gökçen’s rise from insignificance. 10 years ago, to become Istanbul’s robust second airport approaching 24 million passengers, with the expectation that a second runway will be ready within two years, giving Istanbul an eight-runway system in the medium-term.

Kotil also claims the advent of the new airport will encourage expansion of his traffic over the city in other ways: “Many Asian airlines will increase their routes and frequencies to both of Istanbul’s airports. Our message to other airlines, whether code sharers or Star Alliance is: ‘Fly to Turkey more!’”
OUR LOUNGE IN ISTANBUL IS BIGGER THAN SOME AIRPORTS.

Two floors, 5900m², 12 bars, spiral staircase. It's a pleasure to get lost in.
Torsten Hentschel has a wealth of relevant airport industry experience, with roles including Senior Manager Building Construction and Planning at Leipzig Airport, and Head of Terminal Planning and Airport Processes at an international consultancy, before establishing and becoming Managing Director of TH Airport Consulting in 2010. TH Airport Consulting combines practical experience in the planning, construction and operation of airport terminals, with scientific approaches to the analysis and optimisation of airport processes. It has been a World Business Partner since 2011, and Hentschel displays a proactive approach, supporting ACI EUROPE through participation in its Facilitation & Customer Services Committee, as well as the Taskforce on the Passenger Experience. He also provided invaluable contributions to the Guidelines for Passenger Services at European Airports. The guidelines were published in June 2014 and have become a valuable source for airports seeking to enhance their passenger experience in a systematic and comprehensive way.

“The award has great meaning to me, as it expresses the appreciation for my engagement within ACI EUROPE," Hentschel enthused. "The award encourages me to continue working within ACI EUROPE on the latest issues and future trends regarding airport development and operations.”

His progressive contribution to the work of the Facilitation & Customer Services Committee focuses on ideas relating to the passenger experience and the terminal of the future. “I am proud being a member of such a great committee, and to benefit from the inspiring exchanges on best practices and innovative solutions. I try to add even more value to the work of this committee.” Hentschel commented.

In the coming years, the Facilitation & Customer Services Committee will update and enhance the Guidelines for Passenger Services at European Airports to incorporate new trends and additional aspects of the passenger experience. Hentschel will be engaged in this process, with the aim of developing reference guidelines for airports.

Indeed, based on these guidelines, TH Airport Consulting is continuing research efforts and recently delivered an interesting study on Enhancing the passenger experience at airports for a growing number of elderly travellers. The idea was to implement the methodology of the guidelines for a specific passenger group, analyse the specific expectations and needs of this group, and define measures to enhance their airport experience. “We systematically considered initiatives using the so-called 3P approach (Premises, Processes, People),” Hentschel explained. “We found that there is significant potential for airports to enhance customer satisfaction for elderly travellers – for example, with regard to terminal infrastructure, critical factors are walking distances and accessibility, as well as clear wayfinding and signage. Processes need to be simple and easy to understand. Airport employees can more proactively react to the needs of elderly travellers if they are aware of their expectations and needs. We would be happy to support airports with our findings and expertise to enhance the passenger experience for this important and growing target group in the future.”

‘Passenger experience a key success factor’

TH Airport Consulting has this year been engaged in projects at Hamburg, Bremen, Mumbai and Riyadh airports.

Looking ahead, Hentschel outlined plans to embark on further research into the passenger experience, and terminal of the future concepts. “We think that the passenger experience is a key success factor for airports. Therefore, we will provide services for airports to develop strategies and tailor-made initiatives to enhance the passenger experience, as well as to use and implement the principles of the Guidelines for Passenger Services at European Airports,” he concluded.
İGA-HOSTED ACI AIRPORT EXCHANGE 2015

İGA-hosted ACI Airport Exchange: Seven senior Istanbul New Airport speakers announced

İGA Havalimanı İşletmesi A.Ş., the company behind the €10.2 billion Istanbul New Airport, will this year host ACI Airport Exchange, featuring: The 1st Istanbul New Airport Development Conference: “The New Mega-Hub Shaping The Future Of Aviation”.

Leading a line-up of seven Istanbul New Airport senior speakers: Nihat Özdemir, Board member of İGA Havalimanı İşletmesi A.Ş. and Chairman of the Board of Directors of Limak Holding.

Key addresses from:

Dr Temel Kotil, General Manager and CEO, Turkish Airlines
Serdar Hüseyin Yıldırım, General Manager and Chairman of the Board, DHMI

Key senior İGA speakers and topics:

Nihat Özdemir, Board member of İGA Havalimanı İşletmesi A.Ş. and Chairman of the Board of Directors of Limak Holding

Yusuf Akçayoğlu, CEO İGA Construction
Constructing the world’s most important airport development: What does the global mega-hub of tomorrow look like when you have the opportunity to start from a blank piece of paper? Are special methods being used to build the facilities in record time?

İrfan Gündüz, Senior Advisor to CEO İGA Construction
What are İGA’s technological “must-haves” to build the most advanced and efficient transfer hub in the world?

Ülku Özören, Director of Environment & Sustainability, İGA Havalimanı İşletmesi A.Ş.
Along with LEED certification, what multiple measures is Istanbul New Airport taking to ensure that it is environmentally sensitive in construction, and sustainable in its future operation?

Trevor Carnahoff, Deputy General Manager – Chief Business Development Officer, İGA Havalimanı İşletmesi A.Ş.
The outstanding proposition: What great opportunities does Istanbul New Airport create for ALL airline, ALL retail, and for ALL other types of commercial partners?

Cem Çakarakir, Deputy General Manager, Airport City, İGA Havalimanı İşletmesi A.Ş.
The Airport City: “The new business centre of Istanbul.” To what extent is İGA using the huge advantage of planning and regulating this development from scratch to ensure high quality tenants and maximum real estate yield? Will this Airport City be like something never seen before?

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70 exhibitors confirmed and 150 expected. 
“The İGA-hosted ACI Airport Exchange, jointly organised by ACI EUROPE and ACI Asia-Pacific, will be one of the largest ACI events ever staged,” says Olivier Jankovec, Director General, ACI EUROPE.

“İGA-Hosted ACI Airport Exchange: Seven senior Istanbul New Airport speakers announced”

Airport Business Autumn 2015
ACI Airport Exchange will bring the world’s air transport community together in Istanbul, for an event consisting of:

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- FACILITATION, IT & CUSTOMER SERVICE CONFERENCE
- NEW LEADERSHIP AND CHANGE SUMMIT
- DIGITAL ENGAGEMENT SUMMIT

Conference attendance includes access to exclusive networking social events.

KEYNOTE ADDRESSES INCLUDE:

- DR TEMEL KOTIL
  GM & CEO
  Turkish Airlines

“"The İGA-hosted ACI Airport Exchange will be the first major international event focused around this game-changing mega-hub, providing the first real chance for İGA and our partners to showcase the vision and the giant step towards the future that Istanbul’s New Airport represents.”

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London Heathrow is putting both the passenger and the local resident at the heart of its expansion strategy, working hard to maximise the economic benefits that the airport brings, while carefully managing its environmental responsibilities and being a good neighbour to its local communities.

This was recognised at the 2015 ACI EUROPE Best Airport Awards, where Heathrow won both the ‘Over 25 million passengers’ award and the ‘Eco-Innovation’ award. The judges praised Heathrow for building and opening the new Terminal 2: The Queen’s Terminal on time and in a congested area, while securing excellent customer satisfaction ratings. They also noted Heathrow’s role as a “catalyst of environmental innovation”, highlighting its “excellent track record of reducing emissions”.

“I am immensely proud to receive these awards on behalf of all the people who work every day to make Heathrow better for its passengers,” John Holland-Kaye, CEO London Heathrow Airport, commented. “Heathrow plays a hugely important role both as the front door to the UK and also by connecting British people, exporters and exports to markets across the globe. Our efforts to make this one of the best airports in the world have been recognised.”

The awards followed a record year in 2014, when Heathrow handled 73.4 million passengers, and further growth is expected in 2015 through the use of larger and fuller aircraft, and some new short and long haul routes.

£11 billion (£15bn) has been invested in Heathrow’s transformation since 2003, and this was crowned by the opening of Terminal 2: The Queen’s Terminal last year. The next phase will be to demolish Terminal 1, which closed in June, extend Terminal 2, and then close Terminal 3.

Holland-Kaye emphasised that Heathrow’s approach to expansion has involved listening to local residents and understanding how expansion can better fit into the local community. “My team spends a considerable amount of time listening to the views of local residents and elected representatives. We meet with them regularly through forums such as the Heathrow Airport Consultative Committee, and the Heathrow Community Noise Forum,” he explained. “This constructive dialogue has helped us to understand the main issues of local concern regarding Heathrow’s operations and how we can respond positively to them.”

On air quality, Heathrow has a good track record of reducing emissions. By establishing a free local bus travel area, and encouraging car sharing and cycling, it has reduced the proportion of airport workers travelling by single use car from almost 80% to just over 50%. “By charging more for polluting aircraft we have encouraged airlines to bring their cleanest, quietest planes to Heathrow,” Holland-Kaye said. “Our focus on air quality has reduced ground-based NOx emissions from airport activity by 16% over a five-year period.”

On surface access, over 40% of passengers travel to the airport by public transport today – with expansion it will be over 50%.

“Although Heathrow is now quieter than it’s been at any time since the 1970s, we know we must do more to reduce airport noise impacts,” Holland-Kaye added. “We recently released a blueprint for noise reduction – a 10-point plan to cut noise. I have written to the CEOs of 40 airlines to ask them to do their part; phasing out of the remaining noisiest planes, operating continuous descent approaches, a delay in lowering landing gear, and modifying A320s to reduce noise. We are also working with BA to trial steeper angles of descent, keeping planes higher over London.”

Meanwhile, on local employment, 50% of colleagues at Heathrow are from the local area, with 6,000 local students each year currently going through Heathrow educational programmes. The Heathrow Academy also offers job opportunities, recruitment and apprenticeships.

“I believe that there is a huge opportunity for an expanded Heathrow to act as a catalyst for environmental innovation, research and development – that will not only improve the local environment, but create green jobs and support the UK’s burgeoning green economy,” Holland-Kaye enthused. “We will create the world’s best connected, most efficient hub airport at the heart of an integrated transport system.”

London Heathrow was a double winner at this year’s ACI EUROPE Best Airport Awards, securing both the ‘Over 25 million passengers’ award and the ‘Eco-Innovation’ award. That success was quickly followed by the UK Airports Commission’s recommendation for a third runway at Heathrow. The airport’s CEO John Holland-Kaye was interviewed by Ross Falconer.

Heathrow a ‘catalyst of environmental innovation’
Milano Malpensa

Best European Airport of 2015
Milan Malpensa’s award-winning Terminal 1 reinvention

Milan Malpensa Airport has undergone a step-change over the past year, the most visible element being the €30 million transformation of Terminal 1 completed ahead of Expo Milano 2015. This contributed to Milan Malpensa winning this year’s ACI EUROPE Best Airport Award in the ‘10-25 million passenger’ category. Giulio De Metrio, Chief Operating Officer, SEA Aeroporti di Milano, spoke to Ross Falconer.

SEA Aeroporti di Milano’s efforts over the past year have been designed to bring new life to Milan Malpensa Airport. The eyes of the world are on Milan this year, with Expo Milano 2015 taking place from 1 May to 31 October, and the elegant refurbishment of Milan Malpensa Terminal 1 creates a tangible sense of place. The reinvention of Terminal 1 was a major factor in Milan Malpensa winning this year’s ACI EUROPE Best Airport Award in the ‘10-25 million passenger’ category. The overall vision for the development, which began in 2012, was to make Terminal 1 easier for passengers to use, and this has been achieved by relocating the security search area to the same level as check-in. Meanwhile, there is a vibrant, enhanced commercial proposition totalling 13,000sqm, with the new Piazza del Lusso (Luxury Square) and Piazza del Gusto (Taste Square) at its heart.

“We invested €30 million in a functional restyling, completely changing the approach to security and having a different approach to the retail and food & beverage. The new centralised security zone is used by both Schengen and non-Schengen travellers, meaning all passengers pass directly into the same retail area,” Giulio De Metrio, Chief Operating Officer, SEA Aeroporti di Milano, explained.

He speaks passionately about the “attention to detail”, which has built “a new experience that gives a feeling of being in Italy.” The results, and the impressions of the passengers and airlines, suggest that the redeveloped Terminal 1 strikes the right key.

Milan Malpensa won praise from the ACI EUROPE Best Airport Awards judges for its integration of art exhibitions promoting Italian and international culture. Milan is a cradle of Italian art and music, and the airport has taken special steps to reflect this. “We have built a special area between Terminal 1 and the train station, which we call La Porta di Milano (The Gate of Milan), so when you cross that threshold you feel you are coming to a special place,” De Metrio enthused. The holistic vision involves installations of both contemporary and classic Italian art. “We also try to give an international feeling to what we do, as the airport is Milan’s gateway to the world,” De Metrio added.

Indeed, the ACI EUROPE Best Airport Awards judges also noted Milan Malpensa’s “dedicated initiatives to welcome Chinese travellers”. The ‘Chinese Friendly Airport’ project aims to make Malpensa more attractive and comfortable for Chinese customers. De Metrio explained that this includes Chinese-speaking shopping helpers to assist in the retail environment, the inclusion of Chinese in the main airport signage, and a dedicated smartphone app to further support Chinese travellers.

The future certainly looks bright for Milan Malpensa. In the first half of 2015 the airport handled 8.6 million passengers and confirmed its status as an intercontinental hub – over 30% of traffic connects with non-European destinations, with particularly significant growth reported with the Middle East (+9.5%), Far East (+16.1%), and the Americas (+7.5%). Cargo performance has also been impressive, with 6.7% growth to a record 246,000 tonnes in the first half of the year. Meanwhile, plans are in place to further enhance the retail offer after Expo Milano 2015 with a ‘Pop’ (Popular) Piazza. This will offer brands at a more accessible price-point, meaning Terminal 1 will have areas dedicated to luxury retail, mass-market retail, and food & beverage, all adjacent to one another to maximise convenience for customers.
It’s great to be best. But, at Heathrow, we always want to be even better.

Heathrow’s done the UK proud again this year. For the second year running ACI have voted us Europe’s Best Airport (over 25 million passengers).

And we’re equally proud to have won the prestigious ACI Europe 2015 Eco-innovation award: for what was cited as Heathrow’s “extensive efforts… in energy efficiency, groundbreaking research on aviation noise and... forward planning on environmental issues.”

Of course, it’s great to be voted best. But we know that you can’t deliver the best service without constantly striving to be better.
Cologne Bonn Airport attaches great value to innovation and service across all aspects of its business. Indeed, the airport has changed dramatically over the past decade. It has doubled passenger numbers as a result of its focus on low-cost traffic; its infrastructure has been expanded and transformed, with modern terminals and a large retail area; and it was the first airport in Germany to introduce a free WiFi service with no time restrictions.

"With our colourful brand presence, we have repositioned ourselves internationally and have remained true to our roots in the Rhineland in doing so. Passengers and airlines obviously appreciate that," Michael Garvens, Chairman of the Management Board, Cologne Bonn Airport, commented.

The latest recognition came in the form of its recent ACI EUROPE Best Airport Award in the ‘5-10 million passenger’ category. The judges praised Cologne Bonn Airport for “investing in expansion while minimising the impact on day-to-day operations” and “a commitment to providing a strong relationship with the local community”.

“When we improve our product, or optimise our operational processes, we always have our airlines in mind, because they need optimum conditions at all times. That applies especially to the specific requirements of the low-cost carriers, such as short turnaround times,” Garvens explained. “The same applies to our neighbours. Acceptance in our environment is very important to us. The airport is our region’s gateway to the world and something people identify with.”

Among Cologne/Bonn’s passenger experience enhancements over the past year is a significantly extended retail offering. The airport now has over 50 shops and restaurants, and also utilises its smartphone app to offer gift tokens and discount promotions to travellers. There is also an emphasis on making Cologne/Bonn a family-friendly airport, with a dedicated security lane for parents travelling with children.

Low-cost long-haul developments

The airport saw passenger numbers rise by 4% to 9.5 million in 2014, and the growth trend is continuing in 2015 with an 8% increase to over 4.5 million passengers in the first six months of the year. The next few months look like being very exciting indeed. "The new Lufthansa subsidiary Eurowings will be starting low-cost long-haul flights for the first time in November," Garvens said. "That is unique in this form in Europe so far and will change the competition on the long-haul market. It is a huge opportunity for Cologne/Bonn. After the two major hubs, with Eurowings we will be the third Lufthansa base for long-haul flights, and we intend to establish ourselves in that segment over the long-term.”

Eurowings will offer 21 long-haul flights each week to 10 destinations, among which are Dubai, Thailand and the Caribbean.

The biggest growth driver among the airlines in the first half of 2015 was Ryanair, which is continuing to grow by basing two more aircraft at Cologne/Bonn this autumn and expanding its route network in the winter schedule to 17 destinations.

Building on the success of its route development strategy, Garvens highlighted the China and North America markets as interesting. “There are strong airlines there and a growing demand for connections to Europe,” he commented. “The topic of low-cost long-haul is playing an even greater role there in particular. A lot will happen there over the next few years and we want to be part of that as the German low-cost market leader.”

Meanwhile, as part of the biggest maintenance and restructuring programme in its history, the airport plans to invest around €100 million by 2022 in preserving its infrastructure. €70 million of that will deliver renovation of the runway system – the heart of the airport.

Cologne Bonn Airport is clearly not resting on its laurels and has a strong commitment to keep improving. “We are setting the course for a prosperous future for the airport. Our success story continues. We are presently growing twice as fast as the German market and will crack the magical mark of 10 million passengers again this year, which represents 6% growth. I am certain that a further chapter will be added to that story in 2016 as well,” Garvens concluded.
Our Runway
Your Potential
The Budapest Airport vision is clear – to be the best airport in both its peer group and region. It is a philosophy ingrained into each of its business and corporate units, and embodied by the progressive vision of the airport's CEO Jost Lammers. He discussed the developments that have been central to Budapest Airport’s continued growth, and led to it being commended in the '5-10 million passenger’ category at this year's ACI EUROPE Best Airport Awards, with Samantha Jenkins.

**Budapest Airport’s passenger experience focus contributing to dynamic growth**

Budapest Airport is the most dynamically-growing in Central and Eastern Europe, and 2015 has been a year of success on many levels. Its recovery since the collapse of national carrier Malév in 2012 has been impressive. Indeed, in commending Budapest Airport (BUD) in the '5-10 million passenger’ category at this year's ACI EUROPE Best Airport Awards, the judges praised its “dynamic reaction to difficult circumstances” and “already-recognised and awarded quality in ASQ”.

The airport’s CEO Jost Lammers is justifiably proud of BUD’s successes and the role of the entire team in delivering these. “It is teamwork, teamwork, teamwork. Without this, a business cannot fulfil its objectives,” he asserted. “After the collapse of your largest customer, you need to stand up and be counted, and the BUD brand has taken on the mantle of customer champion by investing so much in research, digital services and, of course, marketing. As long as passengers appreciate this, we must be doing something right.”

Building on a record year in 2014, in which it handled 9.1 million passengers, results for the first half of 2015 show an impressive 11.8% year-on-year growth, putting BUD on track to handle about 10 million passengers this year.

This growth has exceeded expectations and demonstrates the importance of Budapest as a destination for both business and leisure customers. “On the new airline/new route front, we are firmly focused on bringing new players to the market, as evidenced by Air Transat, Air China, and Emirates in the last few months,” Lammers explained. “The biggest white spots for us are Southern France, Southern Spain, the US, and Bangkok, Tokyo and Seoul in Asia. There is proven demand in these markets and our published incentive schemes support airlines willing to invest in flying to Budapest.”

The passenger experience is front and centre of Lammers’ vision for BUD. Over €340 million has been invested in the airport’s redevelopment in recent years, including the new SkyCourt terminal which opened in 2011. Recent enhancements include changing the sliding automatic doors in Terminal 2A to revolving doors to make the insulation better in both summer and winter; the parking offer has been upgraded, with online discounts boosting occupancy by 40%; and security screening equipment has been updated. “We have also introduced passenger support assistants in the check in area,” Lammers added. “On the airside, we opened ‘The Terrace’, which is a go-to location for travellers to enjoy a rooftop snack or drink while watching the aircraft on the apron. In cooperation with our lounge operating partners, I am also pleased to say that two refurbished lounges have enhanced the passenger experience.”

Looking ahead, the priority is to continue giving passengers the best possible experience. Integral to this is ensuring that the airlines are satisfied with the BUD infrastructure, and Lammers explained that the airport is investing in areas such as e-charging poles for handlers to migrate to cleaner energy sources to carry out their daily work. Indeed, BUD has a clear commitment to environmental efficiencies. It has participated in ACI’s Airport Carbon Accreditation for over five years, and last year reached Level 2 – ‘Reduction’ – following a 25% decrease in carbon emissions and the launch of an energy and carbon management programme. “A special focus of the programme is electric mobility, and we are working with our tenants and partner companies to install new charging stations and renew the fleet to include 200 electric vehicles at the airport by 2018,” Lammers commented.

Meanwhile, several of BUD’s retail concessions in SkyCourt expire in Q1 2016, and it has launched tenders for these in categories including fashion, watches & jewellery, and news/books. It is clear that the BUD team is working tirelessly to realise its vision for a best-in-class passenger experience, thinking beyond the merely functional to help create differentiation. Record traffic figures suggest it is a strategy resonating with passengers. If BUD maintains its current performance, it is likely to exceed 10 million passengers this year and move into the ‘10-25 million passenger’ category.
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Via Madrid or Barcelona, for sure!

The shortest route in many cases
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Adolfo Suarez Madrid-Barajas and Barcelona-El Prat airports have everything you need. From them you’ll be able to increase frequencies and open up new routes to Latin America and Asia.
Adolfo Suárez Madrid-Barajas Airport is experiencing double-digit traffic growth this year, resulting from a proactive and successful route development strategy, while its passenger experience has also been enhanced through a major refurbishment in 2014. The airport’s successes were recognised at this year’s ACI EUROPE Best Airport Awards, where it was commended in the ‘Over 25 million passengers’ category. Airport Director Elena Mayoral outlined her vision to Samantha Jenkins.

Madrid-Barajas: ‘The perfect platform to connect Asia and Latin America’

Elena Mayoral, Director, Adolfo Suárez Madrid-Barajas Airport: “Our main strength is our leadership in connectivity to Latin America. We are confident that we can be the perfect platform to connect Asia and Latin America.”

Madrid-Barajas’ infrastructure consists of five terminals and four runways, meaning it has sufficient capacity to accommodate traffic growth for the foreseeable future. Throughput reached almost 42 million passengers in 2014, and the airport has a capacity of 70 million.

The airport underwent a major refurbishment in 2014, which provided 15,400sqm of new commercial space. There are 47 new restaurants, 27 different brands, ‘The Fashion Gallery’ which is the largest luxury store in a European airport, and ‘Air Rooms’ – an airport hotel.

Building on a desire for continual improvement, Mayoral explained that the airport has launched ‘Plan Barajas 100’ – 100 actions designed to enhance the passenger experience. Initiatives announced so far include improved security checkpoints, personalised services for passengers with reduced mobility (PRMs), new areas for families, and refurbishment of the security checkpoints, personalised services for passengers with reduced mobility (PRMs), new areas for families, and refurbishment of the passenger experience. Initiatives announced so far include improved security checkpoints, personalised services for passengers with reduced mobility (PRMs), new areas for families, and refurbishment of the security checkpoints, personalised services for passengers with reduced mobility (PRMs), new areas for families, and refurbishment of the security checkpoints, personalised services for passengers with reduced mobility (PRMs), new areas for families, and refurbishment of the passenger experience.

Significantly, it was announced in September that Cathay Pacific Airways will launch a four times weekly Hong Kong-Madrid service in June 2016. “It is a route that reinforces our connectivity with China and Asia, and is in line with our marketing strategy to position our airport as the bridge between Latin America and Asia,” Mayoral asserted. “Our main strength is our leadership in connectivity to Latin America. We are confident that we can be the perfect platform to connect Asia and Latin America. In fact, it is noteworthy that it is the shortest route with one stop between China and some Latin American countries, such as Brazil, which is why Air China flies through Madrid to Sao Paulo.”

Alongside these terminal developments, Madrid-Barajas is a symbol of modernity and progress. Looking ahead, the focus is on further improving the passenger experience through ‘Plan Barajas 100’, while the airport also has new ideas for its retail areas, which will be announced soon.

Elena Mayoral, Director, Adolfo Suárez Madrid-Barajas Airport: “Our main strength is our leadership in connectivity to Latin America. We are confident that we can be the perfect platform to connect Asia and Latin America.”
THE KEY IS LONGER-TERM DEALS, SO THERE IS
UNITED AIRLINES AND THEN AMERICAN AIRLINES.
SPENT 14 YEARS IN THE AIRLINE SECTOR WITH
SIDES OF THE FENCE, HAVING PREVIOUSLY
PIONEERING. INDEED, HALL HAS SAT ON BOTH
EMPLOYEES SETTLING IN THE EAST OF LONDON.
PARTICULARLY IN THE TECH SECTORS, AND THEIR
LONDON MOVING EAST – IN TERMS OF BUSI-
NESS. THIS YEAR, THIS CAN BE PARTLY ATTRIBUTED
TO LONDON MOVING EAST – IN TERMS OF BUSI-
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PARTICULARLY IN THE TECH SECTORS, AND THEIR
EMPLOYEES SETTLING IN THE EAST OF LONDON.

STRATEGIC RELATIONS WITH THE AIRLINES IS
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UNITED AIRLINES AND THEN AMERICAN AIRLINES.
"THE KEY IS LONGER-TERM DEALS, SO THERE IS
GREATER CERTAINTY FOR BOTH THE AIRPORT AND
THE AIRLINES. IT ALLOWS US TO WORK WITH THE
AIRLINES ON THEIR OPERATIONAL NEEDS AND TO
THINK LONGER-TERM ABOUT HOW WE CAN WORK
TOGETHER," HALL STATED. "WE ALSO SHARE
DATA WITH OUR AIRLINE CUSTOMERS TO ENABLE
GOOD DECISIONS ON NEW ROUTES, AS WELL AS
INCREASED FREQUENCIES ON EXISTING ROUTES."

THE COLLABORATIVE APPROACH HAS CERTAINLY BEEN SUCCESSFUL – YEAR-TO-DATE
PASSENGER VOLUMES ARE UP 20%, AND FLYBE
ARRIVING IN OCTOBER 2014 WAS THE SINGLE
BIGGEST AIRLINE LAUNCH IN LONDON CITY’S
28-YEAR HISTORY.

€22M WESTERN PIER DEVELOPMENT
WHILE PLANNING PERMISSION HAS NOT
BEEN GRANTED FOR THE WIDER CITY AIRPORT
DEVELOPMENT PROGRAMME (THE AIRPORT HAS
MOUNTED AN APPEAL AND A PUBLIC INQUIRY
WILL START IN MARCH 2016), A SEPARATE £16
MILLION (£22M) REDEVELOPMENT OF THE
WESTERN PIER IS UNDERWAY.

"WE BELIEVE THE MAYOR OF LONDON’S
DECISION TO ISSUE A REFUSAL DIRECTION TO THE LONDON BOROUGH OF NEWHAM WAS THE
WRONG ONE, IGNORING THE SIGNIFICANT SOCIAL
AND ECONOMIC BENEFITS THAT THE AIRPORT’S
DEVELOPMENT WILL BRING, AS WELL AS THE
COMPREHENSIVE PACKAGE OF MEASURES THAT THE AIRPORT HAS PROPOSED TO MITIGATE AND
CONTROL NOISE," HALL EXPLAINED. "IN ADDITION,
IT SENDS THE WRONG MESSAGE ABOUT INVEST-
MENT IN THE EAST OF LONDON AND LONDON
GENERALLY, AND SEEMINGLY DISREGARDS THE
2,000 EMPLOYMENT OPPORTUNITIES THAT THE
CADP WILL CREATE, AS WELL AS THE £1.5 BILLION
(€2BN) OF ANNUAL ECONOMIC IMPACT THAT AN
EXPANDED AIRPORT WILL DELIVER."

THE WESTERN PIER DEVELOPMENT WILL BE
COMPLETE IN Q3 2016, MAINTAINING LONDON
CITY’S CENTRAL PROPOSITIONS OF SPEED AND CUSTOMER
EXPERIENCE EXCELLENCE, WHILE CREATING A BRIGHT, OPEN PLAN SPACE THAT INCLUDES MODERN
SEATING, ELECTRONIC BOARDING GATES, NEW RETAIL AND FOOD & BEVERAGE OUTLETS, AND 600 ADDITIONAL SEATS.

FURTHER ENHANCEMENTS TO THE PAS-
SENGER EXPERIENCE INCLUDE NEW CHECK-IN
AND BAG DROP KIOSKS, PROVIDED BY PHASE
5 TECHNOLOGY, WHICH HAVE REDUCED
CHECK-IN TIMES TO AS LITTLE AS 55 SEC-
ONDS. LONDON CITY HAS ALSO IMPLEMENTED
THE CROWDVISION PASSENGER ANALYTICS
SOFTWARE, WHICH DETECTS AND ANALYSES
REAL-TIME PASSENGER MOVEMENT, GENER-
ATING ACTIONABLE METRICS SUCH AS QUEUE
LENGTHS AND JOURNEY TIMES.

OF COURSE, THE AIRPORT IS STRIVING TO
MAINTAIN ITS SUCCESS AND TO RETAIN THE
ACI EUROPE BEST AIRPORT AWARD IN 2016.
OVER THE NEXT 12 MONTHS IT WILL COMPLETE
THE WESTERN PIER DEVELOPMENT, FOCUS ON
THE APPEAL PROCESS FOR THE CITY AIRPORT
DEVELOPMENT PROGRAMME, EXPLORE NEW
OPPORTUNITIES WITH ITS AIRLINE PARTNERS, AND,
ABOVE ALL, MAINTAIN ITS CORE PROPOSITIONS
OF SPEED AND A PREMIER CUSTOMER EXPERIENCE.
 Regular readers will recall our lead interview with Brussels Airport Company CEO Arnaud Feist in the Spring issue of Airport Business. At that time, we reported on record passenger numbers, an award-winning route development strategy, and impressive infrastructure developments.

Brussels Airport has further built on that success in the intervening months, resulting in it being commended in the ‘10-25 million passenger’ category at this year’s ACI EUROPE Best Airport Awards. The judges praised the airport for ‘significantly improved connections, and record traffic’, in part due to a €75 million investment in the new ‘Connector’ building. “It is nice acknowledgement of the hard work by all of the airport employees,” Feist told Airport Business. “All 20,000 employees on the Brussels Airport site contribute to our success, and let us not forget the 40,000 employees indirectly involved in our daily operations.”

The airport’s success can, in part, be traced back to the adoption in 2012 of a new strategy, which places the passenger at the heart of everything Brussels Airport does. “Connector is the emblem of this strategy, because its primary purpose is to further improve the quality of the airport infrastructure for our passengers and airlines,” Feist commented.

This €75 million investment in Connector is part of a wider €1 billion programme designed to allow the airport to strengthen its competitive position, while improving the infrastructure and customer service. The next projects involve comprehensive runway renovation, the renovation of Pier B and its commercial area, a renewed arrivals hall, and potentially an extension to Pier A.

The headline figures illustrate Brussels Airport’s success over the past year. Feist is justifiably proud of a strong performance which saw 15% year-on-year growth to almost 22 million passengers in 2014, eight new airlines in 2014-2015, 350 new flights per week, and 26 long-haul flights serving Brussels every day. “Our route development strategy is particularly focused on Star Alliance,” Feist said. “With Brussels Airlines as our home carrier, we have the opportunity to develop as a prime Star Alliance hub in Europe. We would like to add carriers such as Singapore Airlines, Air China, and South African Airways, and more US destinations through United Airlines.”

In June, All Nippon Airways (ANA) announced a daily service from Tokyo, launching on 25 October. “It confirms Brussels Airport is attractive for more long-haul routes. However, our strategy is not only focused on Star Alliance. We also work closely with other alliances, with low-cost airlines, and with our two other home-based carriers Jetairfly and Thomas Cook Airlines,” Feist added.

Runway renovation programme

The significant investment being made to accommodate this continued growth and further enhance the passenger experience has, in addition to Connector, included automatic access gates, scan&fly baggage drop-off, an upgraded smartphone app, and a modern new 25-lane security screening platform in the Connector building. Brussels Airport is also committed to the environment, and is accredited at the Optimisation level of Airport Carbon Accreditation. Feist explained that it invests in permanent noise monitoring, CO2 reduction, solar panels, and electric vehicles.

The most recently completed element of the investment programme is the renovation of runway 25L/07R, the third and final stage of which was concluded in September. The asphalt surface layers have been replaced, the runway shoulders and drainage system renewed, the sewerage renovated, and the runway lighting replaced with energy-efficient LED lighting. Using LED lamps instead of halogen lamps will result in electricity savings of 420,000 kilowatt-hours per year. This corresponds with the annual electricity consumption of 115 households (3,500 kWh/year) and a carbon reduction of 116 tonnes per year. The airport’s other two runways will be renovated in the coming years.

As Brussels Airport continues to build on the many successes of the past year, Feist explained that it is encouraged to enter the 2016 ACI EUROPE Best Airport Awards. Projected growth in passenger and cargo volumes, new long-haul routes such as ANA’s Tokyo service, new commercial developments, and a steep rise in commercial revenues, are among the contributory factors. “We Belgians are relatively modest. However, for Brussels Airport, we think we could earn another commendation, or even more, next year,” Feist concluded.

Brussels Airport can reflect on myriad successes over the past 12 months, not least its record traffic figures, eight new airlines, the opening of its emblematic new ‘Connector’ building, and the recently completed runway renovation programme. These all contributed to the airport being commended in the ‘10-25 million passenger’ category at this year’s ACI EUROPE Best Airport Awards. Arnaud Feist, CEO Brussels Airport Company, outlined the latest developments to Samantha Jenkins.

**Passenger-focused strategy brings improved connections and record traffic at Brussels**

Brussels Airport was commended in the ‘10-25 million passenger’ category at this year’s ACI EUROPE Best Airport Awards. “It is nice acknowledgement of the hard work by all of the airport employees. All 20,000 employees on the Brussels Airport site contribute to our success, and let us not forget the 40,000 employees indirectly involved in our daily operations,” Arnaud Feist, CEO Brussels Airport Company, commented.

Runway renovation programme

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2014 marked a real step-change both for Glasgow Airport and for the city itself. The year was punctuated by a series of major events, including the 2014 Commonwealth Games and the Ryder Cup, and the airport’s successes in terms of route growth, terminal investment, and sustainable development, led to it being commended in the ‘5-10 million passenger’ category at this year’s ACI EUROPE Best Airport Awards. Francois Bourienne, Commercial Director, Glasgow Airport, spoke to Ross Falconer.

Glasgow Airport focused on ‘route development, excellent customer service, and continued investment’

The eyes of the world were on Glasgow last year, when it hosted a series of major international events including the Commonwealth Games, the MTV European Music Awards, and the Ryder Cup. Acutely aware of the role it had to play in welcoming hundreds of thousands of visitors to the city, Glasgow Airport ensured it was ready to play its part by undertaking a £20 million (£28m) investment programme.

Importantly, the airport has built on the success of last year and has recorded double-digit growth in passenger numbers every month since November 2014. “We expect our passenger numbers for 2015 to step comfortably above eight million, returning us to pre-recession levels,” Francois Bourienne, Commercial Director, Glasgow Airport, commented. Indeed, it was among Europe’s fastest-growing airports in the first half of 2015 (+13.8%).

Glasgow Airport won praise from the ACI EUROPE Best Airport Awards judges for ‘route growth, terminal investment, quality standards, and sustainable development’. “To be highly commended by our peers is a tremendous honour,” Bourienne stated. “It confirms that our ongoing efforts in route development, providing excellent customer service, and continued investment, are well placed. It is also testament to the efforts of the 5,000 people who work tirelessly to deliver for the city and for Scotland.”

New routes and passenger growth

Traditionally, Glasgow Airport has had a strong track record in long-haul services due to its large catchment area of 2.3 million, and with 18 such routes it is Scotland’s principal long-haul airport. “We want to consolidate that position and add further routes such as WestJet’s daily, direct flights to Halifax, Nova Scotia, which took off from Glasgow in May 2015,” Bourienne said.

Strengthening European connectivity also continues to be a priority and the airport works closely with its city and regional partners to develop compelling propositions for airlines. Glasgow Airport welcomed Ryanair for the first time in October 2014, which together with Jet2.com, easyJet, and Wizz Air, has helped to significantly enhance Glasgow’s connectivity with key European cities including Prague, Budapest, Milan, Barcelona, and Rome.

“Our success in securing new routes has translated into passenger growth and the challenge, as always, will be to maintain this pattern. It is important to note that we have enjoyed sustained passenger growth since January 2011,” Bourienne added.

Looking ahead, Glasgow Airport is cognisant that growing its route network will not in itself ensure continued success. Like all service-oriented businesses, much of the airport’s reputation depends on its staff. Since the launch of its Customer Charter in 2012, Glasgow Airport has been on a journey to improve the customer experience and create a ‘one airport’ culture, involving all partners in delivering consistently high levels of service. Over 2,500 staff have received customer service training. Glasgow Airport has recorded four consecutive years of growth and expects passenger numbers for 2015 to comfortably exceed eight million, putting it on track to achieve nine million. “We will certainly be seeking to go one step further next year and secure the crown of best airport in the ‘5-10 million passenger’ category. It would mean so much to everyone at the airport who has worked so hard to deliver success in recent years,” Bourienne concluded.
After notable success in recent years, Hamburg Airport is on track to handle 15 million annual passengers for the first time this year. Central to this growth is route expansion, sustainable and corporate programmes, and innovation, all of which led to it being commended in the ‘10-25 million passenger’ category at this year’s ACI EUROPE Best Airport Awards.

Michael Eggenschwiler, CEO Hamburg Airport, spoke to Samantha Jenkins.

**Hamburg Airport’s dedication to innovation, CSR and long-haul route development**

Hamburg Airport’s mission to be a reliable partner and neighbour is clear. At the heart of all operations at Germany’s fifth busiest airport lays a quest for innovation, route development and sustainability. Importantly, this has transferred into impressive passenger numbers, with 9.3% growth last year to a record 14.76 million passengers. That trend has continued in 2015 – the period to end-July saw a 7.6% increase – and the airport forecasts 15 million annual passengers for the first time this year.

This success was recognised at this year’s ACI EUROPE Best Airport Awards, where Hamburg Airport was commended in the ‘10-25 million passenger’ category. The judges praised the airport for its “increased connectivity including a portfolio of 28 new routes”, “new self-service infrastructure for passengers”, and for paying “special attention to corporate social responsibility”.

“Because of its proximity to the city, the airport carries a special responsibility for the surrounding area, for the environment, and for secure employment in the Hamburg Metropolitan Region,” Michael Eggenschwiler, CEO Hamburg Airport, explained. “Hamburg Airport’s sustainable corporate philosophy delivers long-term, forward-looking security for northern Germany’s principal airport.”

This philosophy includes a voluntary noise protection programme, and sponsorship of cultural, sporting and social projects.

*Route development and an enhanced passenger experience*

easyJet has an important share in current passenger growth in Hamburg. Its increased seat capacity and new services are stimulating demand. The airport has a wide portfolio of low-cost carriers, whose business model works well at Hamburg, a popular city break destination. Its route development strategy includes a focus on direct services to France and Eastern Europe. “We are also looking at markets where the yields are well above average, and talking to airlines about introducing further frequencies or larger aircraft,” Eggenschwiler added.

The dynamic growth being experienced on European services means the Hamburg team is increasingly focusing on long-haul traffic. Currently United, Emirates, and Iran Air, all serve Hamburg. “Our main focus is on China and North America. Furthermore, we are in talks with airlines that fly long-haul to seasonal leisure destinations, such as the Caribbean and Canada,” Eggenschwiler commented.

Several projects are being pursued to enhance the passenger experience at Hamburg Airport. Gift Recommender is a service designed to provide innovative and practical gift ideas for men, women and children. Another example is the airport’s cooperation with Yoints. With the Yoints retail app, passengers and visitors can get points when they visit many shops at Hamburg Airport and elsewhere in the city. Users of the app are automatically recognised when they enter a participating shop, and the latest special offers are displayed on their smartphone. The digital shopping service launched in July – FillMyFridge.de – has also been very successful, enabling passengers to order groceries for collection on their arrival into Hamburg.

Meanwhile, a significant development project underway is the new Hamburg Airport Cargo Centre (HACC), which will open in the second quarter of 2016. There are also plans to renew the airport’s apron. These are certainly exciting times for the airport and the city of Hamburg. “Being Europe’s largest non-capital city, it is not that much of a surprise why Hamburg feels fit to be a candidate for the Olympic Games in 2024. This major project, as well as the opening of the iconic Elb-Philharmonic Concert Hall at the beginning of 2017, are eye-opening reasons for airlines to take a closer look at Hamburg and to discover what is in it for them,” Eggenschwiler concluded.
Tallinn Airport is experiencing traffic growth, new route development, and has enhanced the passenger experience with its creatively transformed terminal interiors. It was commended in the ‘Under 5 million passengers’ category at this year’s ACI EUROPE Best Airport Awards. Rein Loik, CEO Tallinn Airport, spoke to Ross Falconer.

Tallinn’s creative approach enhances customer experience

Airport as “cosy”. Indeed, a key element of his strategy is for Tallinn “to be the cosiest airport in the world, and to have the highest possible service quality level”.

The ACI EUROPE Best Airport Awards judges praised Tallinn Airport for “creative interior design that enhances the customer experience” and “high levels of satisfaction and retail growth”.

The airport was substantially modernised in 2008, including the terminal and airside areas. Enhancements included more retail and food & beverage facilities, business and VIP lounges, spacious check-in and seating areas, a new children’s play area, and unlimited free WiFi.

Loik explained that Tallinn Airport is also transforming its gate areas with individual concepts in cooperation with its Estonian business partners. Gate 2 recently underwent a facelift in collaboration with local beverage producer and bottler A. Le Coq. It now features comfortable red sofas... power points and higher tables for passengers wishing to charge their computers or phones. There is also an adjacent café.

Travellers can keep up-to-date with world news at the Postimees Gate, in cooperation with Estonia’s biggest daily newspaper.

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Kaunas Airport focused on aviation-related business development with new AEROHUB KUN

Lithuanian Airports has launched an ambitious aviation-related business development project at Kaunas Airport – AEROHUB KUN. It is seeking to capitalise on Kaunas’ strategically-favourable geographic location by attracting a cluster of aviation-related companies, with phase one already complete. Jūratė Baltrušaitytė, CCO Lithuanian Airports, detailed the development to Ross Falconer.

Kaunas Airport is changing rapidly, with a progressive future vision. The creation of Lithuanian Airports last year, following the merger into one entity of Vilnius, Palanga, and Kaunas airports, has established a clear strategic direction. This sees Kaunas Airport become the base for aviation-related businesses through implementation of the AEROHUB KUN investment project.

One year on from the merger, the results certainly indicate it has been successful. Figures for the first half of 2015 show that passenger numbers across the three Lithuanian airports grew 10% year-on-year to 1.9 million. "The new organisation has implemented a new management structure and processes, non-aeronautical revenue-driven projects, and strategic development projects like AEROHUB KUN," Jūratė Baltrušaitytė, CCO Lithuanian Airports, explained.

Indeed, AEROHUB KUN is the key project in the development strategy for Kaunas Airport. It primarily focuses on MRO (maintenance, repair, and overhaul) service providers, OEM (original equipment manufacturer) and other spare part manufacturers and traders, as well as aircraft manufacturers and training service providers. “We see AEROHUB KUN hosting a cluster of air-space-related services and activities, enjoying the benefits Kaunas can deliver and exploiting the synergies of members to the best common advantage," Baltrušaitytė said.

€7.2 million has been invested in the first phase, and these initial works have created a new taxiway and apron, paving the way for the start of operations by the first investors. Lithuanian Airports is in discussions with several potential investors – mainly MRO service providers – and expects the first agreement to be signed by the end of 2015. "The project is being presented and promoted internationally," Baltrušaitytė said.
and we are pursuing every lead on the list,” Baltrušaitytė asserted. “In addition to a strategically-favourable geographic location, we can ensure excellent infrastructure. KUN has a 3,250m runway, and there are no curfews, no noise, slot or other restrictions. Meanwhile, Lithuanian investment promotion agency Invest Lithuania consults with, and provides full support to, foreign investors which start operations in Lithuania. One of our key competitive advantages is our multi-lingual staff, with engineering expertise, whose average salary is competitive compared with Western European countries.”

**Low-cost connectivity**

While a cluster of aviation-related businesses is being sought at Kaunas, the airport is also looking to grow its passenger traffic, predominantly through new low-cost carrier services. Ryanair is currently completely dominant at Kaunas, with 18 destinations this summer season. It relocated an aircraft to Kaunas in July, introducing a route to Copenhagen in the process, which immediately achieved excellent performance. Ryanair’s top performing routes from Kaunas include London Stansted, Dublin and Oslo, with load factors exceeding 85%.

“Due to excellent road infrastructure to Kaunas, customers from Northern Poland, Belarus, South Latvia, and Kaliningrad, all travel from KUN. We see passenger traffic as one of the important activities for KUN.” Lithuania is becoming an increasingly attractive destination for both tourist and business traffic, as figures for the first half of 2015 attest. Following the 10% growth achieved in the first six months, Lithuanian Airports expects its three airports to handle over 3.8 million passengers this year. These passenger numbers are indicative of a strengthening national economy and the increased mobility of people, with the airports playing an important role in Lithuanian economic growth. Lithuanian Airports is capitalising on this with a clearly-defined vision, a key element of which is implementation of the AEROHUB KUN investment project that positions Kaunas Airport as the base for aviation-related businesses. With €7.2 million invested in the first phase, AEROHUB KUN is ready for the start of operations by the first investors. Lithuanian Airports is in discussions with several potential investors, and is indeed already looking ahead to the second phase of the development, during which it plans to connect Kaunas Airport with Kaunas Free Economic Zone.
There are over 3,000 Sunglass Hut stores worldwide. How many of those are located at airports right now and how important is the channel to the brand?

Airports are a core retail channel for Sunglass Hut and a priority in our global growth plan. At airports, Sunglass Hut generates exceptional sales productivity with a broad offer appealing to all passenger profiles. In fact, many of our top performing Sunglass Hut stores from the 3,000 that you mentioned are located at airports.

In 2014, we opened 31 new Sunglass Hut outlets at airports, taking the tally to over 140 standalone stores and kiosks in airports worldwide right now. This includes London Heathrow, Singapore Changi, Rome Fiumicino, Milan Malpensa and Hong Kong.

With the bulk of your stores in domestic markets operated directly, do you apply the same operating model for Sunglass Hut at airports?

The global airport channel is quite unique, so we are adopting a new flexible model. This includes directly operated stores, outlets run by local partners or franchise holders and the newest approach where Sunglass Hut stores are run in partnership with the primary travel retail operator at an airport. Examples of this model include Dufry in Milan Malpensa, LS Travel Retail in Rome, and World Duty Free Group in Düsseldorf.

With a new Sunglass Hut airport store opening every 12 days in 2014, we seek new leasing opportunities at airports as part of our ambitious expansion plan for 2015 and beyond, and therefore with many different contractual and leasing scenarios at airports, a flexible model is vital. It's a case of having open dialogues and finding the right solution for each airport location.

Q: What's next in your ambitious expansion strategy?

There's really no ceiling on the number of Sunglass Hut outlets that we could open in travel retail, as long there is commercial viability. We provide a great retail income to airports and passengers love our brands, love our products and respond very well to our distinctive store concept, which includes innovation such as the magic mirror technology.

It's worth highlighting that Sunglass Hut is one part of an overall multi-formatting strategy that Luxottica is applying to the airport channel, as the sunglasses category leader.

Q: What is multi-formatting in the sunglasses category?

Multi-formatting is about executing the sunglasses category in different ways at different stages in the passenger journey through an airport, targeting different shopper needs and behaviours. In short, this spans a sunglasses department in the main duty free shop which is all about impulse, sunglasses in brand boutique which is all about the brand enthusiasts and a genuine brand experience, and the specialist standalone sunglasses shop which is about pre-planned purchases and the most definitive specialist sunglasses experience and service. Then we have the last-minute and arrivals stores for distress purchases, often of the best-sellers, and pop-up promotional concepts, which bring additional tactical visibility and interaction for the category.

Q: And finally, what role can multi-formatting have in driving further growth in the sunglasses category?

Multi-formatting is crucial to the future growth of the category, as we know from airports where it is executed best, such as Heathrow and Gatwick, we drive incremental sales and do not cannibalise sales from one point of sale to another. To fully realise the potential, I would like to see more airports integrate standalone sunglass stores into their retail mix, to complement our presence in the multi-category department store environment of the main duty free shop.

Of course, I believe that Sunglass Hut is a natural partner for airports as we are the world's largest specialty sunglass retail brand with over 3,000 stores – recognised, trusted and loved by consumers worldwide.
MAKE THE MOST OF TRAVEL RETAIL’S FASTEST GROWING CATEGORY WITH SUNGLASS HUT

Sunglass Hut is a proven travel retail concept with a broad offer appealing to all passenger profiles. In 2014, we opened 31 new Sunglass Hut outlets at airports, taking the tally to over 140 standalone stores and kiosks in airports worldwide, including London Heathrow, Singapore Changi, Rome Fiumicino and Hong Kong.

Sunglass Hut’s new flexible model for airport operations allows for our own directly operated shops, shops run by local partners and shops run in partnership with other travel retail operators.

Contact Pablo.MartinGomez@luxottica.com

George May Jagger wears Michael Kors MK6004.
AviAlliance is one of the world’s leading private industrial airport investors and managers. Its balanced portfolio currently comprises shareholdings in five airports – Athens, Budapest, Düsseldorf, Hamburg, and Tirana – which together handled 62.8 million passengers in 2014. AviAlliance Managing Directors Holger Linkweiler and Gerhard Schroeder outlined the company’s strategy and investment criteria to Ross Falconer.

AviAlliance focused on bringing added value and long-term growth to its airport investment portfolio

In conversation with Airport Business, the AviAlliance Managing Directors Holger Linkweiler and Gerhard Schroeder articulate a clear and progressive vision for the investors’ continued growth. Outlining AviAlliance’s key investment criteria, Linkweiler commented: “The first, and most important one, is the quality of the catchment area, which includes a stable legal environment. We are also focused on situations where we can bring knowledge and added value – for example, if infrastructure expansion or operational optimisation are required.”

Local stakeholder expertise

AviAlliance is open in principle to investing in airports of all sizes, but prefers an annual throughput above five million, believing that this allows the flexibility for good management to create real added value. As an investor it likes to be involved on board level, and also in terms of operational optimisation. Schroeder explained that local stakeholder involvement is absolutely vital. “This is a very important characteristic of AviAlliance,” he said. “On one hand, airports are international, global businesses, but they are, at the same time, very local businesses. As an investor, we appreciate very much the local management teams – they develop the airports in line with the needs of the catchment areas and the regions around them. In that context, it’s always helpful to have a local partner who understands the local specifics.”

So, in principle, AviAlliance likes the airports in which it invests to be run by local management on a day-to-day basis. There are specific situations – such as major capital expenditure plans, or difficulties with regards to airlines – in which it is a hands-on investor. “In these kinds of situations, we are ready to help, but clearly in cooperation with the local management,” Linkweiler added.

Looking ahead, AviAlliance is positive about the continued development of its existing portfolio, and has plans to expand into other regions, including Asia, South and North America. “We are looking globally at expansion. If we look at the statistics and traffic forecasts in Asia, there will be a lot of growth,” Schroeder noted. “I think the key to success is to better understand the culture, and as well to work together with local partners to improve the common investments.”

It is clear from our discussion that AviAlliance is a long-term investor with financial power, and a clear and ambitious vision for its future growth, focused on airports with a stable framework, freedom to optimise the asset, and potential for long-term growth.
Future Airside is here, now.
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ADB Group’s SmartExpansion Path concept is said to offer a complete toolbox for airports to achieve ‘no-stress’ growth. The approach takes a complete view of airfield operations to help airports manage their growth priorities.

Christian Onselaere, CEO ADB Group, explained that SmartExpansion Path is not a product or solution that an airport simply selects. “Instead, it’s an integrated approach to addressing the major challenges that airports face in their airside operations,” he said. “Integrated because it pulls together all the elements needed to help airports plan their growth in the face of increasing air traffic, more and more stringent regulations, ever-greater emphasis on safety, and the impact of new technology. All of these challenges can be met in a way that ensures airports can accommodate more traffic, reduce turnaround time, and optimise the management and maintenance of their airfield assets.”

Of course, every airport is individual, so the approach with SmartExpansion Path is to work with the airport to explore its current situation, its existing bottlenecks, and to jointly plan a future set-up that meets its growth aims in the most efficient way possible.

In practice, SmartExpansion Path looks at airport expansion in the context of eight domains of airfield operations – data-driven traffic management, detailed audit & survey, intuitive AGL design, innovative products & solutions, robust system engineering, dedicated services and project management, in-depth training, and proactive maintenance. “These ‘building blocks’ are analysed sequentially, or selectively, to achieve no-stress growth,” Onselaere commented. “There’s a lot of detail in this, but broadly the domains encompass everything from airside traffic management based on real data, to proactive maintenance of airside assets and in-depth training, to ensure the airport’s staff are properly equipped to deal with the new systems.”

The SmartExpansion Path strategy has been designed as a step-by-step approach, allowing airports to undertake key steps at their own pace and within budget. “By reviewing an airport’s current set up, traffic patterns, key challenges and critical issues, we are able to determine the quick wins and develop a step-by-step approach that will considerably improve the airport’s operational efficiency, adherence to international regulations and availability,” Onselaere added. “For example, an extensive onsite survey of all airfield lighting related equipment and systems, their location and current condition, enables us to recommend what’s required for regulatory compliance and safety.”

ADB Group has discussed the SmartExpansion Path philosophy with several airports and has undertaken some initial projects, for example at klia2 – the low-cost terminal at Kuala Lumpur International Airport. The terminal has its own runway and control tower, and ADB Airfield Solutions has designed and delivered a fully integrated system with its complete range of AGL equipment, including approach, runway, taxiway and holding lights. “Our AGLAS Airfield Lighting Control System has replaced the airport’s existing equipment, which controls stop bar lighting on Runway 2,” Onselaere noted.

Other airfield systems installed by ADB include its Constant Current Regulator, Precision Approach Path Indicators, guidance signs, and microwave sensors. Of course, airports are constantly striving to optimise their operations and implement new technologies. “Today’s aviation industry is booming, with more traffic and more passengers – all of which demands better and faster service, and turnaround time. An airport is like a mini country with decisions that impact traffic, safety, movements, maintenance, civil works, and much more. No airport can be an expert in everything, so we are offering something different that allows an airport to focus on its core business and ADB will support all key activities, whether on the airside or beyond,” Onselaere concluded.
As airports handle ever-growing volumes of passengers and bags, the development of innovative systems and intelligent software is vital to ensure efficient, reliable baggage handling. Samantha Jenkins reports on Vanderlande’s progressive developments.

Creating innovative systems, intelligent software and life-cycle services

Fast, safe and robust solutions for the transportation, storage and sortation of baggage are essential for both efficient airport operations and a positive passenger experience. This applies from check-in to make-up, as well as for transfer and arrival baggage. A combined approach, covering innovative systems, intelligent software and life-cycle services can provide optimum performance of integrated baggage handling systems. Vanderlande can provide initial business and logistical planning, concept analysis and design, through to reliable project execution and lifetime operational support. Among its most recent developments is a new airport-wide operations and maintenance (O&M) contract at Barcelona-El Prat Airport. The contract has been awarded to Vanderlande for one year, with potential for renewal on an annual basis for a further two years, subject to agreement between both parties. Vanderlande has operated and maintained the baggage handling facilities in Barcelona’s Terminal 2 since 2009, when it delivered a state-of-the-art TUBTRAX system. It has also installed the majority of baggage handling equipment in the airport’s Terminal 2, but the O&M was previously carried out by other parties.

‘With our Spanish customer centre located in Barcelona itself, and Aena being the biggest baggage handling customer in Spain, this contract is of significant strategic importance,’ stated one of Vanderlande’s baggage handling experts. ‘We will now be able to implement our operations and maintenance methods, and other proven ways of working, from the old terminal to bring the overall service levels up to an excellent standard. This will contribute to a further reduction of missed bags.’

Individual carrier systems, like TUBTRAX, are designed to transport bags in carriers at high speeds over long distances. Each carrier is tracked and guided through the system with an in-built RFID chip, minimising lost baggage and ensuring more bags make their flights on time. New features of TUBTRAX include a high-capacity unloading unit and an inline stacking unit. ‘The new TUBTRAX stacker/de-stacker minimises the need for empty carrier return lines by stacking them up to four high and sending the stack back to the loading areas. For systems with high-capacity peaks, the same units can stack or de-stack up to six carriers and store them in offline buffering zones. This solution is also available as a retrofit package for existing TUBTRAX systems,’ commented one of Vanderlande’s baggage handling experts. ‘In addition, we have introduced an updated version of the dynamic high-capacity unloader, which will set new standards in availability, reliability, dimensions and capacity. It can unload 2,750 bags per hour at 2.5m/s with only two electric motors covering a length of 3.8 metres.’

Sustainability is also a core Vanderlande principle. Its latest development in conveyors, the BLUEVEYOR was designed under ‘Cradle to Cradle’ principles, meaning it is extremely energy efficient and has been optimised for both reuse and recycling of materials after service. Meanwhile, SCANNOJET is a new automated tray return system for hand baggage at security checkpoints. “It has been designed to increase throughput, reduce operational costs, and improve the passenger experience without affecting security levels,” explained one of Vanderlande’s baggage handling experts.

SCANNOJET makes it possible for operators to review X-ray images remotely, away from the checkpoint. It also offers passengers a more favourable experience, as SCANNOJET automatically prepares empty units ready for passengers. The modular design allows it to adapt to different airport requirements. Customers can configure the system in a number of ways, for example how the empty tray will be presented to the passenger, if it will work in remote mode, or whether empty tray recognition capabilities are included.

Value-added automated baggage handling solutions clearly benefit both the operational efficiency of airports and the passenger experience. Companies such as Vanderlande are always looking ahead and working on new ideas and technologies to enable their customers to handle the growing number of passengers and bags.
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Dependable, predictable aircraft arresting systems

Kevin Quan, Vice President, Sales & Marketing, Zodiac Aerospace, interviewed by Samantha Jenkins.

One of the most compelling reasons to consider use of an aircraft arresting system is its effectiveness in overrun protection. "Zodiac’s EMAS technology – EMASMAX – has a perfect record in stopping every single aircraft that has used it. The dependability and predictability of EMASMAX provides a high level of security and safety that airports can depend on," Kevin Quan, Vice President, Sales & Marketing, Zodiac Aerospace, asserted. "This is only possible through Zodiac’s requirement of a high quality standard when it comes to design and manufacturing. Installation of an arresting system would also greatly reduce the footprint required and can potentially allow an airport with sufficient RESA to gain runway length."

Zodiac Aerospace currently has four EMAS arrestor beds installed at Madrid-Barajas and Kristiansand airports. Those beds are in place and standing by to mitigate the severity of an aircraft overrun, and the company is in discussions with a number of airports throughout Europe to see how EMASMAX can be an effective solution for them.

EMASMAX is the latest generation of Zodiac’s EMAS product, which has evolved over the last 20 years since its first installation in 1996 at New York-JFK International Airport. "Improvements to components of the product have allowed it to be more durable, more predictable in performance, and require a lower level of maintenance," Quan commented. "We have over 100 systems installed worldwide in locations above the Arctic Circle, as well as hot and humid environments, to high altitude locations prone to excessive UV exposure."

When the technology was first developed in the 1990s, the objective was to create a product for larger commercial service airports. However, as more and more airports saw the need for such technology, varying strengths of the product were developed to allow smaller airports without commercial service to install the arrestor beds. "In fact, some of our real-life aircraft arrestments have been at smaller airports with corporate business jets," Quan explained. "As for the design of our arrestor beds, each EMASMAX bed is uniquely configured to optimised performance for the fleet mix on an airport’s specific runway."

EMASMAX has stopped aircraft as large as a 747 down to as small as a Citation. Furthermore, some of these overruns occurred on a contaminated runway, which is not an issue for EMASMAX as it relies on the tyre crushing action for deceleration and not friction between the tyre and EMAS material. As an added benefit, the airports were able to bring the runway back into operations as quickly as a few hours.

Zodiac Aerospace is working on a number of innovative products to improve airport safety. "I cannot disclose what they are yet, as we are still in the development stage. What I can share with you is that we expect to be able to launch these products in the near-term," Quan concluded.
**LCY invests in new generation kiosks, smartwalls and FIDS**

London City Airport has made a significant investment in new technology to help improve the passenger experience. New state-of-the-art self-service check-in kiosks, mobile check-in desks, flight information display screens (FIDS) and “smartwall” screens have been introduced to help ensure passengers enjoy a fast and simple departure experience. The common use kiosks have been designed to make the check-in process as intuitive as possible, while the mobile wireless check-in desks will be deployed during peak periods, so passengers can be processed without having to queue at a traditional check-in desk. The new FIDS are linked to a content management system, which allows the airport to easily control what information is displayed at any given time. A total of 89 news FIDS will be installed, along with the smartwall screens, which London City Airport says are designed to support check-in operations. Alison FitzGerald, London City Airport’s Chief Information Officer, said: “We have already introduced free and fast Wi-Fi, improved seating featuring power points for passengers to charge phones and other devices, and the new kiosks, wireless check-in desks, and FIDS will all help us to meet the increasing demand we are facing and provide our customers with the high quality level of service they have come to expect from us.”

**SWISS rolls out home-printed bag tags**

SWISS has become the latest carrier to launch home-printed bag tags, which are now available to all of its passengers flying from Zurich and Geneva who check-in online. When passengers print their boarding pass they will also have the option of printing their bag tag, including for onward connections, with the exception of codeshare flights.

The printed Az bag tag simply has to be folded and placed in a reusable plastic pouch, which can be collected at the airport, before it is attached to the bag. The pre-tagged bag can then be dropped off at a self-service bag drop machine or at a staffed bag drop desk. SWISS has also revealed that it now intends to make home-printed bag tags more widely available. The service is already available on selected flights to Geneva from New York JFK, Pristina, Marrakech, Skopje and Moscow, as well as flights to Zurich from New York JFK and Moscow. Plans are in place to introduce home-printed bag tags for passengers flying from other airports in the United States and more international stations outside of the European Union.

**Lufthansa launches RIMOWA Electronic Tag**

Lufthansa and RIMOWA have jointly launched the RIMOWA Electronic Tag, which is the first fully integrated mobility solution for luggage. The suitcase features an embedded digital bag tag, which can be updated by passengers using their smartphones. The RIMOWA Electronic Tag will be trialled by a number of Lufthansa’s passengers over the coming weeks, before the product is made available to buy in early 2016.

Jan Reh, CEO, RIMOWA, said: “The most important thing for us was to work with Lufthansa to create a standard for electronic tagging. We wanted to make it as easy as possible to go from analogue to digital. What we have created is a one-to-one electronic tag – it’s the same size as the paper tag, it contains the same information as the paper tag, and it can also include the green stripe for flights within the EU. The e-ink digital display contains all the information that is contained on the paper tag.” While Lufthansa is the launch partner, Reh explained that this is “not just a one-airline solution; it is designed for all airlines for the benefit of all travellers.”

Dr. Bjoern Becker, Director Product Management & Airport Passenger Services, Lufthansa German Airlines, added: “For Lufthansa it was very important that the solution is fully integrated. The Lufthansa app generates the bag tag, which is sent to the digital tag during the check-in process — it is very easy and convenient to use for the passenger. It was important for us to design this product with RIMOWA as a high quality partner to ensure reliability and user friendliness.”

**INNOVATION SHOWCASE**

Ranging from Google Glass-equipped agents to WiFi-based passenger tracking, a number of new initiatives are helping to improve the travel experience at Europe’s airports. Ryan Ghee reports.
Recognising progressive ideas in action transforming airport performance and reputations

INNOVATION SHOWCASE

Autumn 2015

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Bergamo Airport introduces private ‘living pods’

Bergamo Airport has installed so-called “living pods”, providing a private space for passengers to rest, sleep or work while they wait for their flight. The pods, supplied by ZZZleepandGo, feature a foldout desk with USB ports and reading light, a bed and a multimedia television screen. The soundproofed rooms also include Wi-Fi and access to 220V power outlets, so travellers can charge their electronic devices. Before each new guest arrives, bed linen is changed automatically, and the interior is sanitised and scented. ZZZleepandGo has also developed an accompanying app, which travellers can use to manage their account, make bookings and view their billing history. The market for private pods is becoming increasingly popular. For instance, Helsinki Airport has installed sleeping pods for transit passengers, Sheremetyevo Airport was among the first to offer “Sleepboxes”, and passengers at Abu Dhabi International Airport have access to “GoSleep” pods in Terminal 3.

Geneva Airport extends self-service bag drop system

Geneva Airport has doubled the number of self-service bag drop units available to passengers in light of high demand for the service. The airport initially installed three Scan&Fly units in 2014, and has now introduced three more, all of which can be used by passengers flying with SWISS, Lufthansa, SAS, Austrian Airlines, Brussels Airlines, LOT Polish Airlines and TAP Portugal. Passengers who have checked in online can proceed straight to a bag drop unit upon arrival at the airport, and those who have not already checked in can do so at a self-service kiosk before using the self-service bag drop.

Jacques Morgenegg, Project Manager Landside at Geneva Airport, explained that while seven Star Alliance carriers can currently make use of the system, the airport has ambitions to create a fully common use self-service bag drop.

Travellers trial arrivals shopping concept at Munich Airport

A new shopping concept called “emmasbox” is currently being trialled in the baggage reclaim area at Munich Airport. emmasbox is essentially a huge refrigerator containing more than 60 individual drawers, each of which contains meals and ingredients, which passengers can purchase before they leave the baggage reclaim hall in Terminal 2. The drawers are kept at different temperatures, which allows a variety of foods to be stored, ranging from sushi to a Bavarian Menu option. A total of seven different shopping bags are on sale, and once passengers have paid for their products using a credit card, the drawer is unlocked and they can collect their items. Innovation Management of Munich Airport and German supermarket corporation Edeka are undertaking the trial.

The idea behind it is to allow passengers to do their grocery shopping while they wait for their luggage, rather than having to stop at a supermarket on the way home after a business or leisure trip. Passengers will be able to use emmasbox for a four-month period, before Munich Airport assesses uptake and passenger response.

The trial of the “emmasbox” shopping concept is being jointly undertaken by the Innovation Management of Munich Airport and German supermarket corporation Edeka.

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Facebook Head of Travel Lee McCabe, interviewed by Ross Falconer.

‘Airports still playing catch-up on smartphone apps’

The digital revolution has enabled airports to engage directly with travellers like never before. Social media is a major driver of this, enhancing the travel experience by allowing airports to forge direct relationships with their passengers and supporting their transformation from B2B to B2C businesses. Facebook, with 1.5 billion active users worldwide, offers unparalleled opportunities to interact with passengers, whether it be through Facebook ‘check-ins’ or as a platform for customer service queries.

The ACI EUROPE Digital Report 2014-2015 highlighted some fascinating figures: at the time of publication, there were 289 European airports present on Facebook, with a collective three million fans. Meanwhile, 164 of Europe’s airports offered branded smartphone apps.

Indeed, the connected traveller now has a symbiotic relationship with their smartphone, and this creates huge opportunities for businesses, including airports. However, they are opportunities that airports are not yet capitalising on, according to Facebook Head of Travel Lee McCabe. He told Airport Business that “most are playing catch-up, especially when it comes to apps”.

McCabe explained that smartphone apps are where airports, airlines and other stakeholders across the travel journey should really be focusing their efforts. “There’s so much you can do with apps – you can leverage all the signals from the smartphone and create a far better experience,” he said. “One of the questions we get asked a lot by companies is: ‘Should we develop an app or mobile web?’ If we look at the big companies in the US for an indication – the majority of website visits are mobile-only or multi-platform. If you look at Amazon and eBay and what they’re using, it’s apps – so apps are dominant. The companies who get it right are developing good apps that are working well.”

Providing context is also important – utilising beacon technology, for example, offers airports the opportunity to target travellers with relevant information, such as promotional vouchers in the retail environment, or flight status updates. “Then convenience is essential – just make that app easy to use. Have a good app, perhaps partnering with your retail environment, or with the airlines, but whatever the objective is make sure I can do it easily in that app,” McCabe emphasised.

Expanding on that, his advice to airports is to view their app as a platform, which provides the vital flight information and services, but can also be enhanced and developed by third parties. “That’s where the real innovation takes hold, and it would bring increased value and convenience to passengers,” he commented.

As regards how businesses use Facebook, McCabe asserted that the word ‘social’ is irrelevant. “Businesses who understand the platform well just view it as an advertising/marketing platform – they think, there’s 1.5 billion active users and we can target them very specifically,” he said. “I think the problem is that airports are still in this ‘social’ world, and that’s what held a lot of businesses back. To begin with, companies got confused by the word ‘social’ and thought it was about ‘likes’ and ‘fans’. As soon as they view it as a platform where they can target people very specifically, it works much better for them.”

Digital technologies are already a major component of most airports’ business strategies, and the pace of evolution offers exciting opportunities for even greater interaction with travellers. It will be interesting to see how increased smartphone functionality and wearable technology, for example, can be utilised in the airport environment, and indeed what further developments may appear on the horizon.
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