Agility & innovation: Communications to Connectivity

Interview:
Piret Mürk-Dubout, CEO Tallinn Airport
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Within days of our 26th Annual Congress & General Assembly, which took place in Athens last June, Istanbul-Atatürk Airport was struck by a deadly terrorist attack – the second such attack at a major European airport this year. Of course, we at ACI EUROPE immediately reached out to our friends and colleagues at TAV & DHMI – offering support and expressing our condolences. 11 employees from TAV were among the victims on 28 June.

Just like at Brussels Airport last March, the events at Istanbul-Atatürk have revealed both the worst and the best in humanity. The tireless dedication of airport staff in providing assistance to all those affected, as well as their amazing drive and stamina to restart operations, has been a great source of pride for our industry. And beyond the countless individual actions and hundreds of untold human stories that unfolded, this was also an account of leadership at its best. We should not and will not forget.

In aviation, every terrorist attack tends to trigger more regulations. Not this time. After Brussels, the debate about imposing systematic and EU-wide security checks at the entrance of airport terminals was short-lived. After Istanbul, that debate lost even more relevance. Systematic entry checks were in place at Istanbul-Atatürk, and they did not prevent the attack. This is now even reflected in the deliberations of ICAO’s 39th Assembly, which just concluded in early October.

Taking advantage of both the ICAO Assembly and the ACI WORLD & NORTH AMERICA Annual Congress, we took the ACI EUROPE Board to Montreal last month and met with Peter Neffenger, the new Chief of the US TSA (Transportation Security Administration). I was impressed by the Administrator’s willingness to challenge our current security system and his readiness to think ‘outside of the box’. His plans to refocus TSA on innovation and system integration are refreshing – and for the first time in a very long time, I came closer to feeling optimistic about aviation security.

While ACI EUROPE is currently working on Best Practices Guidelines for landside security, our Special Security & Crisis Management Summit (22-23 November, Brussels) will provide a unique opportunity to keep engaging the industry and our regulators on what remains the number one priority for airports, along with safety.

Meanwhile, we are also closely following the fallout of the BREXIT vote. If the decision to leave the EU has had no immediate material impact of air traffic levels, the fact remains that there is total uncertainty as to the kind of arrangements that will govern future UK-EU aviation relations. Air connectivity is a unique and indispensable enabler of economic activity, in particular for tourism, trade and foreign investment. On this basis, one would hope that BREXIT negotiators would seek to keep the UK and EU aviation markets closely integrated – as called for by ACI EUROPE just a few hours after the vote.

But this is not just about aviation. Postures and comments from all sides constantly remind us that BREXIT negotiations will be primarily a political exercise. And recent developments across our continent also point to political outcomes becoming more unpredictable than ever.

All in all, one thing has clearly emerged over the past months: geopolitical and terrorism risks are increasingly shaping our business – bringing about record levels of uncertainty and volatility. This is likely to be a new and lasting normal, at least in the short & medium term.

“...
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

Keflavik Airport

Has handled 4.5m passengers so far in 2016; 2015 total was 4.9m.

In order to improve the passenger experience, the airport is using BlipTrack, Wi-Fi sensors that track passenger flow through terminals in real-time. BLIP’s sensors monitor passenger queues and dwell times within the terminal, which help Keflavik calculate waiting times to pass security and display them in real-time.

Keflavik also displays wait times on the airport’s website, helping keep travellers informed of potential delays even before they leave home. The sensors only register each device’s unique ID and do not pick up any sensitive personal information.

Oslo Airport

Each month between March and July, monthly throughput has exceeded two million passengers.

Norway’s Oslo Airport has opened its new domestic arrivals hall, the first stage of a major redevelopment plan. Arriving domestic passengers will be served by a hall some 15,000sqm larger than the old facility. This is the first large part of the facility to open before the new Oslo Airport officially opens on 27 April 2017. The redevelopment will also include a much-expanded departures hall and a new, 300m-long third pier that will handle both domestic and international flights at 17 parking spots, 11 of which will be equipped with airbridges. Construction work will continue in many areas of the facility until the formal opening of the completed airport on 27 April 2017.

Gatwick Airport

If its 2016 growth so far this year continues, the airport should get close to 43m annual passengers.

Gatwick, in partnership with DHL, is set to become the first hub in the world able to dispose of Category 1 airport waste on-site and convert it into energy. Category 1 is defined as food waste or anything mixed with it – such as packaging, cups, meal trays – from international transport vehicles. From November Gatwick’s new £3.8 million (€4.5m) processing plant will not only dispose of this waste safely on-site, it will also convert it – and all other organic waste – into energy to power the new plant and heat the North Terminal. Gatwick currently treats 2,200 tonnes of so-called Category 1 waste a year – around 20% of the total generated at the airport – and the new energy plant will process around 10 tonnes a day.

Lisbon Airport

If its 2016 growth so far this year continues, Lisbon should top 21.5m annual passengers.

ANA/VINCI Airports has invested in upgrading its operating capacity and commercial areas at Lisbon Airport. The new walk-through duty free shop has been expanded by 450sqm to 1,900sqm. In terms of operations, new security control and screening areas incorporating 10 new X-ray scanners have been built, which increases operating capacity to 3,000 passengers per hour in Terminal 1. The number of scanners to read and validate boarding passes has been increased to nine terminals and a new check-in area has been put into service with an extra 10 check-in desks already available and a further six scheduled to become operational in November.

Nice & Lyon Airports

Nice has grown by on average 5% during 2016 (Jan-Jul). Lyon has record double-digit growth in peak summer months of June & July.

France has chosen the winning bidders for the sale of 60% stakes in the French airports of Nice Côte d’Azur and Lyon-Saint-Exupéry. Italy’s Atlantia in cooperation with EDF was chosen for Nice Airport, while a consortium of VINCI, state bank Caisse des Dépôts et Consignations and Credit Agricole’s insurance arm Predica was picked for Lyon Airport. The government expects proceeds of €1.22 billion for Nice and €535 million for Lyon Airport.
Tallinn Airport

Despite its recent issues, the airport is still posting marginal year-on-year growth (+0.4%) – Jan-Aug.

Construction work began on 10 August on an extension of the Tallinn tram network to serve the city’s airport. A consortium of Merko Ehitus and KMG Insenerihituse was selected in late 2015 to build the extension. The project cost of €11.5 million (excluding VAT) is 85% financed by the EU. Completion is due in late 2017.

Tbilisi Airport

Based on Jan-May 2016 figures, the airport has monthly growth of over 20%.

A new €23 million terminal will be constructed at Tbilisi’s Shota Rustaveli International Airport as part of a major expansion project. Planned to be completed at the end of 2017, the new terminal will be able to provide service to approximately four million passengers per year. The new terminal will cover more than 12,000sqm. The project also includes the rehabilitation of runway and taxiways and the construction of new aircraft parking.

Milan Airports

Traffic at the two airports combined so far in 2016 (Jan-Jul) has risen from 16.1m in 2015 to 16.5m this year.

Milan’s Malpensa and Linate airports – both run by SEA Group – have launched an all-new app for passengers giving them access to features, including shopping and dining, to improve their travel experience – and on a more interactive basis than the previous app. A complete list of LIN and MXP retailers and restaurants, as well as information about how to get to the airport and where to park, traffic updates and transport options are featured. App users receive free, unlimited access to high-speed Wi-Fi browsing at both airports, as well as discounts and personalised offers. The current languages available are Italian, English and Chinese.

Helsinki Airport

Its average monthly throughput so far in 2016 (Jan-Aug) is 1.43m up from 1.37m in 2015.

Helsinki Airport is testing a new online service that gives passengers the chance to regain valuable items, which are confiscated from hand baggage. Airport operator Finavia currently confiscates around 400,000 items a year during routine security checks on passenger bags and it has teamed up with the Cotio Ltd company to launch this new online portal. The trial run for the retrieval service will last until the end of 2016. Passengers are given a receipt for those items seized by security, and they may then use the information on the receipt to access the service – and their stuff – on www.cotio.fi. The service fee depends on the nature of the item and the delivery method. The online service is available in English, Finnish, Swedish and Russian.

Tivat Airport

Tivat handled nearly 10 times more traffic in June 2016 than it did in January 2016.

The construction of a new terminal at Montenegro’s Tivat Airport is expected to begin later this year. Valued at around €40 million, the expansion project will include the construction of a new terminal building, jetways, apron and a parking lot.
Engaged to Deliver

As a leader in Standard 3 EDS implementation and support, Morpho Detection’s experienced teams get ready for action.

Proactive, responsive, caring—these are words that customers use when describing Morpho Detection’s service and support team. Michael Cavanaugh, Morpho Detection’s Vice President and General Manager, Global Services and Operations, is passionate about delivering. “We have a Six Sigma Quality mindset,” he points out. “We truly consider any system downtime during customers’ operational hours a defect.”

As European airports start upgrading to Standard 3-approved explosive detection systems (EDS), they should consider the difference that going with an experienced EDS provider brings. Take London Heathrow for example. Over the next few years, Cavanaugh’s team, in partnership with qualified London Heathrow technicians and engineers, will install and support forty-five 9800 CTX DSi™ EDS units. These systems will screen all the in-gauge baggage in Terminals 1, 2, 4, and 5—which are all part of the more than 2,000 CT EDS units Morpho Detection has deployed worldwide.

In fact, throughout the UK and around the world, Morpho Detection’s service teams support 90 percent of the world’s busiest airports. These field service engineers and technicians service both Morpho Detection systems, as well as other manufacturers’ and competitors’ equipment. In either case, delivering the highest levels of service excellence is the top priority.

“Over the past few years, we’ve made significant investments in our infrastructure to ensure we’re meeting the needs of our customers at the local and national levels. Today, we have about a hundred local depots and five distribution centres around the world,” explains Cavanaugh. “We’re proud that 50 percent of our fielded equipment has been in service for more than ten years, with some equipment installed, functioning and under service contracts for more than twenty years.”

The top advice Cavanaugh has to offer airports evaluating different EDS suppliers? “Select a trusted security partner with a proven track record of service excellence. Once your Standard 3 system is installed, you need to ensure it runs reliably for years to come. While we strive for flawless installation and operations, the truth is we will encounter problems over the life of our relationship. The true measure of a service organisation is whether they stick with you until they have resolved the problems—no matter who is responsible.”

Some other key elements to consider are proactive communication, outreach, and responsiveness. “Our customers value that we openly communicate not only about the positive things we’re doing, but we’re also up front about any challenges we foresee, and what we’re doing to solve them.”

In the end, Cavanaugh concludes it’s all about service personnel that have the airport’s interests at heart. “How do they care about the operational environment? How do they interact and integrate on-site? You can tell when teams take pride in what they do and are always willing to go the extra mile. Customers appreciate these efforts and trust we’ll continue to deliver on all our promises.”

For more information on Morpho Detection’s Standard 3-approved EDS technology and service offerings, visit morphodetection.com.
Tallinn investing to enhance customer experience and business and operational opportunities

Piret Mürk-Dubout, CEO Lennart Meri Tallinn Airport, interviewed by Ross Falconer.

Tallinn is often referred to as the “Silicon Valley of Europe”. Estonia’s alluring capital city has a population of 440,000 (about a third of the country’s 1.4m total) and is home to the highest number of start-ups per capita in Europe. Most famously, it is the birthplace of Skype, while other notable Tallinn start-ups include TransferWise (a peer-to-peer money transfer service, which has attracted investment from the likes of Sir Richard Branson) and Pipedrive (a cloud-based sales software company). The city is a hotbed of entrepreneurship and innovation, which is mirrored by the airport’s progressive approach.

Piret Mürk-Dubout was appointed as the new CEO of Lennart Meri Tallinn Airport in June and officially started in the role at the end of August. Her background is in telecommunications and IT services, including senior management positions within Eesti Telekom Group in Estonia and abroad, and she draws parallels with the airports industry such as heavy global competition and the importance of agility and innovation in business development. “The company’s development plans are set and major investments require skilful management, but I also believe that my prior international work experience will definitely create many opportunities for the development of the airport,” she adds.

Speaking to Airport Business just a month into her tenure, Mürk-Dubout explains that “these past few weeks have been mostly about getting to know the people and the organisation at Tallinn Airport, and its community.” “There are a number of major infrastructure development projects in motion, with the aim to improve the customer experience and provide a bigger variety of business and operational opportunities to our partners.”

Indeed, Mürk-Dubout has joined at an exciting time for the airport, which is celebrating its 80th anniversary this year, investing €120 million in infrastructure developments, and preparing for Estonia hosting the EU Presidency in the second half of 2017.

“Customer engagement via social media”

Tallinn Airport has been preparing for its 80th anniversary for quite some time, with the anniversary theme incorporated into its customer dialogue and brand messages throughout the year. The airport has a proactive digital communications strategy and is active on social media, with over 17,000 Facebook ‘likes’ and almost 1,000 followers on Twitter. Estonia has declared internet access a human right, and it has digitally streamlined an unprecedented number of public services for citizens and businesses. Tallinn Airport is embracing the countrywide enthusiasm for e-services, and unlimited free WiFi is central to its proposition for passengers. Its latest digital innovation is the ability to pay for parking via mobile device at any of the airport’s car parks.

“We have launched special customer engagement via social media and dedicated historic web-reviews about the history and development of Tallinn Airport,” Mürk-Dubout explains. “The culmination of these events occurred at the end of September with formal celebrations for our customers, partners and employees, and of course, the Estonian society at large as well. But we don’t like to focus too much on looking back at this time – as we are in the process of major extension works, we like to keep our sights on the challenging future instead.”

Tallinn Airport’s myriad developments are taking place against the backdrop of consistent growth, which saw it handle 2.2 million passengers in 2015 – up 7.4% year-on-year, and building on 3% growth the previous year. Figures for the first six months of 2016 show a 1% increase to 1.02 million passengers.
Air traffic restrictions are in place to ensure safety in the construction zone, while the airport undertakes its infrastructure developments. The aim is to match last year’s traffic volumes in 2016.The airport is maintaining that consistency this year, despite the demise of national carrier Estonian Air last November, which operated 27% of Tallinn Airport’s services. Several carriers, including airBaltic, easyJet and SAS, quickly stepped in to replace the lost capacity. The Estonian Government also responded by creating a new carrier – Nordica – which currently operates using the AOC of Adria Airways and is now Tallinn Airport’s biggest airline. Nordica serves 15 destinations from Tallinn, most recently launching services to Rijeka in June and to Odessa in May.

“Our investment programme keeps a strong focus on improving and increasing capacity to prepare ourselves for larger growth numbers in the future,” Mürk-Dubout notes.

**€120m investment programme**

The €120 million investment over the next four years involves redevelopment of the airside area, expansion of the passenger terminal, and a new car park with capacity for 1,200 vehicles.

“Reconstruction of the airside area is one of the largest recent construction projects in Estonia, because in addition to the construction work, we must also ensure flight safety and the regular functioning of the flight operations,” Mürk-Dubout comments. “We have applied certain night-time restrictions to air traffic in the summer months, but thanks to the cooperation and understanding between the airport, the builders and the airlines, we have managed to avoid major disruption to our normal schedule. This is a sign of the professionalism, commitment and good cooperation our people demonstrate on a daily basis in everything that they do.”

Extension of the airside area is progressing apace. Tallinn Airport is currently extending the runway from 3,070m to 3,480m, while next year will see resurfacing works, replacement of the airfield lighting with a new energy-efficient solution, and a more advanced navigation solution installed.

Estonia, like its Nordic and Baltic neighbours, is also a beacon of environmental innovation. Tallinn Airport is itself accredited at Level 1 Mapping of ACI’s **Airport Carbon Accreditation**, and environmental considerations are at the heart of its infrastructure developments. As part of its airside extension, an additional de-icing area will be built at the east side of the airport, alongside environmentally-compliant snow melting sites, melted snow discharge and monitoring systems, and an aircraft engine testing area. Mürk-Dubout explains that the aim is to enhance the environmentally sustainable and efficient management of the airport. Key long-term environmental objectives include increasing the use of renewable energy, reducing
waste generation, increasing waste recycling, and reducing both carbon emissions and water use.

‘The cosiest airport in the world’
The passenger terminal will be extended to accommodate a larger security control area and additional VIP rooms for the EU Presidency. Meanwhile, the new car park will be completed after 2018.

“Another important development will be connecting the terminal with the tramway, linking the airport with the city centre through urban passenger transport. After all, we are only 4km from the city centre – a rare feat in Europe these days,” Mürk-Dubout enthuses.

The airport, of course, plays a pivotal role in welcoming visitors to Estonia, as the first impression and last memory of the country. “In a way we are a calling card for Estonia and our aim is to be ‘the cosiest airport in the world’,” Mürk-Dubout says. “This slogan also serves as our customer promise and we work hard to achieve this at every contact point with our customers and partners.”

The initial plan was to complete the major terminal developments by the end of 2017, just in time for Tallinn Airport to host guests during Estonia’s EU Presidency. Following the Brexit vote in June, the UK gave up its six-month rotating EU Presidency, shifting the timetable and bringing Estonia’s EU Presidency forward by six months. “We are under some pressure to complete some of the works in time to welcome our distinguished guests, but with hard work and meticulous planning we will be able to deliver what is expected from us during these challenging times,” Mürk-Dubout comments.

Tallinn’s tourism magnet: 4.3m overseas visitors
As well as being the tech-savvy home of many innovative start-up companies, Tallinn is increasingly a tourism magnet – its Old Town being a UNESCO World Heritage site, and there are hundreds of kilometres of untouched nature to explore. 4.3 million overseas tourists visited Tallinn in 2015. 45% (1.9m) of these were from Finland, 9% (390,000) from Russia, 7% (297,000) from Germany, 5% (223,000) from the US, and 5% (204,000) from Asia.

Tallinn Airport works hand-in-hand with the Estonian Tourist Board, Enterprise Estonia, relevant ministries and trade associations to determine the most optimal route density and geographical spread for a country of Estonia’s size and location.

“We have identified certain industry players with whom we are in constant contact and we aim to incentivise them to increase their network from Estonia,” Mürk-Dubout explains. “We are very pleased with our current mix of airlines – we have a healthy combination of legacy and low-cost carriers, and the six largest airlines enjoy an almost equal market share between them. It is a

Piret Mürk-Dubout curriculum vitae
Piret Mürk-Dubout (46) was born in Viljandi, Estonia. She studied law and journalism at the University of Tartu and international business administration at the Estonian Business School. Piret has previously held senior management positions in the Eesti Telekom Group in Estonia and abroad, most recently as Member of the Management Board, Retail Customer Division and Marketing Director. Her previous positions also include Vice President of Commercial Development at TeliaSonera Group (a telecommunications provider in the Nordic and Baltic countries). Piret started her new role as CEO of Lennart Meri Tallinn Airport on 29 August 2016.
well-diversified portfolio and we cover most of the hubs that are important to Estonian business and leisure travellers. More importantly, however, we keep a close eye on all routes that bring traffic from elsewhere. Our primary focus will always be on Europe, but we do see some potential in transfer routes between the immediate east and the west as well.”

Having carefully analysed the current market situation, the airport has identified some key routes that it would like to see better served in the future. These include London and other UK destinations, Germany, and some Spanish destinations for the leisure market. A key goal is harmonisation of the seasonal schedules – there are currently over 20 destinations served in winter and over 30 in summer.

Mürk-Dubout speaks enthusiastically about the efforts of Tallinn Airport’s aviation marketing team in collaborating with airlines to promote new services, and ensure every new route is “heard and talked about in Estonia”. “We love crazy, outside-the-box ideas.” This may take the form of joint inaugural events with airlines, marketing campaigns to celebrate new routes, PR support, or close cooperation with local tourism authorities.

These myriad developments at Tallinn Airport are truly facilitating the development of Estonia’s business and tourism, thereby increasing the country’s competitiveness.

“Our ambition is to receive even higher satisfaction results from our customers and partners,” Mürk-Dubout concludes. “The priorities have been set – everyone’s attention is turned to delivering the construction projects on time and with assured quality. We need to focus on route development for next year based on our strategic goals, and we are very excited about the challenges the EU Presidency will bring us next year.”
Happy 25th Anniversary, ACI

With cosiest regards from Tallinn Airport, celebrating 80 years in 2016
What are the new airport connectivity trends?

The latest ACI EUROPE Airport Industry Connectivity Report was released at the 26th ACI EUROPE Annual General Assembly, Congress & Exhibition in Athens in June. Now in its third year, this unique ACI EUROPE Report looks at developments in air connectivity at an airport, national & European level, over the previous year. Inês Rebelo reports.

Connectivity has gone from being a technical word exclusively associated to telecoms and IT, to one with a far richer meaning in the globalised world of today. Given the extraordinary facility that air transport offers by linking cities, regions and countries – the word ‘connectivity’ is a fitting description of the value it generates, one that ACI EUROPE felt that demanded more analysis.

In this third edition of the Connectivity report – conducted in partnership with SEO Aviation Economics – we see that the evolving dynamics and structure of the aviation market are leading to changing air connectivity patterns for Europe. The Report reveals that while 2016 was a good year for direct connectivity growth, indirect connectivity (which looks at flights via a transfer airport) did not increase accordingly. This development reflects shifts in the airline market, and given the importance of air connectivity for wider economic activity, is a trend that will need to be monitored closely.

The Report also reveals that the continued rise of Low Cost Carriers & point-to-point services and the relative retrenchment of legacy carriers & hub and spoke services has led to an unusually strong growth in direct connectivity (+4.5%) this year. More airlines are starting new services made possible by aircraft like the Boeing 787 Dreamliner and Airbus A350 – this is one of the factors at play in the increase in point-to-point services.

Conversely, indirect connectivity and hub connectivity have barely increased (+0.4% and +1%). This disconnect is quite unprecedented as direct connectivity growth usually yields even larger indirect and hub connectivity gains.

The Report also focuses on hub connectivity this year, and examines in detail how a range of European hubs compare with each other and with their peers across the globe. Led by Frankfurt, Amsterdam-Schiphol and Paris-Charles de Gaulle, the major European hub airports, which include Istanbul-Atatürk, London-Heathrow and Munich, remain prominent in the Global ranking – offering the best and most diversified hub connectivity of the world’s hub airports. And these findings naturally underline their role as vital providers of global air connectivity for Europe.

However, the Report also finds that most of the growth in air connectivity in 2016 is happening at smaller hubs and other mid-sized airports. Meanwhile, many very large airports – and especially the major hubs – are experiencing a decrease in both their total air connectivity levels (direct & indirect connectivity) and hub connectivity levels.

With the EU Aviation Strategy putting a clear emphasis on connectivity (and consumers) and various new aviation agreements with Ukraine, Qatar and the ASEAN countries currently in the early stages of development, documenting the trends in airport connectivity is more important than ever.

The ACI EUROPE Airport Industry Connectivity Report 2016 is available in printed version from ACI EUROPE and can be downloaded here: https://www.aci-europe.org/component/downloads/downloads/4685.html.
MONTREAL
THE CAPITAL OF CIVIL AVIATION
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SHAPING THE FUTURE

ALPHA
BRAVO
MONTREAL!
MUCH OF THE WIDER BREXIT DEBATE HAS FOCUSED ON WHETHER THE UK CAN NEGOTIATE CONTINUED ACCESS TO THE SINGLE MARKET WHILE REFUSING TO SIGN UP TO THE EU’S RULES ON THE FREE MOVEMENT OF LABOUR. GREAT EMPHASIS HAS BEEN PLACED BY LEAVE CAMPAIGNERS ON THE UK’S ABILITY TO NEGOTIATE NEW TRADE AGREEMENTS WITH THE EU AND OTHER COUNTRIES, AND ON THE STRENGTH OF THE BARGAINING POSITION THAT THE UK MAY HAVE IN THOSE DISCUSSIONS.

IN AVIATION, THESE EXPECTATIONS WILL RAPIDLY BE PUT TO THE TEST. ACHIEVING THE MOST LIBERAL OUTCOME TO THE NEGOTIATIONS FOR THE AVIATION SECTOR WILL BE OF HUGE IMPORTANCE TO BUSINESS AND CONSUMERS OF ALL NATIONALITIES. BUT ALTHOUGH IT’S IN EVERYONE’S ECONOMIC INTERESTS, IT WON’T BE STRAIGHTFORWARD TO ACHIEVE.

TRAFFIC RIGHTS

FOR BOTH HISTORICAL AND – MOST IMPORTANTLY – TECHNICAL REASONS, AVIATION MARKETS ARE HIGHLY REGULATED. AIRLINES RIGHTS TO OFFER SERVICES BETWEEN ANY TWO LOCATIONS IN TWO DIFFERENT COUNTRIES ARE GOVERNED BY SPECIFIC AGREEMENTS BETWEEN THE GOVERNMENTS CONCERNED. AND – UNUSUALLY IN TODAY’S WORLD OF MULTINATIONAL COMPANIES – THESE AGREEMENTS RELATE SPECIFICALLY TO THE NATIONALITY OF THE OWNERS (AT LEAST AT THE CORPORATE LEVEL) OF THE AIRLINES CONCERNED.

THE SECTOR IS, OF COURSE, ALSO SUBJECT TO EXTENSIVE REGULATION RELATED TO SECURITY, SAFETY, AIR TRAFFIC MANAGEMENT AND THE ENVIRONMENT. MANY OF THESE RULES ARE PAN-GLOBAL, DETERMINED BY THE INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO), THE AVIATION AGENCY OF THE UNITED NATIONS. WHERE THEY ARE NOT, THESE STANDARDS NEED TO BE AGREED BETWEEN THE PARTIES DETERMINING THE TRAFFIC RIGHTS, SO THAT ALL COUNTRIES KNOW THAT THE AIRCRAFT FLYING IN THEIR AIRSPACE ARE WELL-MAINTAINED, SAFELY OPERATED AND NOT NEEDLESSLY NOISY. BUT THEY ALSO NEED TO MAKE SURE THAT THE RULES ARE NOT BEING USED TO BLOCK COMPETITION.

AT PRESENT, BOTH EASYJET AND BRITISH AIRWAYS COUNT AS UK-OWNED AIRLINES. BOTH ENJOY THE FULL FREEDOMS PROVIDED BY THE ECAA. THE LOW-COST AIRLINE EASYJET, IN PARTICULAR, HAS MADE FULL USE OF THIS FREEDOM.


HOWEVER, IT IS IMPORTANT TO NOTE THAT THESE RIGHTS ARE RECIPROCAL. US AND OTHER ECAA CARRIERS WOULD LOSE THEIR AUTOMATIC RIGHTS TO FLY TO THE UK.
Then-UK Prime Minister David Cameron addressed easyJet staff at the airline’s London Luton HQ ahead of the UK’s referendum on EU membership. For easyJet, the loss of freedoms provided by the European Common Aviation Area would be unfortunate but not disastrous. It would not be difficult for easyJet to become an EU-based airline, although in the long run it would probably lead to a more significant rebasing of aircraft in mainland Europe.

Get a move on

For easyJet, the loss of rights would be unfortunate but not disastrous. It would not be difficult for easyJet to become an EU-based airline, although in the long run it would probably lead to a more significant rebasing of aircraft in mainland Europe. IAG already has a Spanish AOC through its ownership of Iberia, and by similar moves it could mitigate the effects on the group. But rights to fly between the UK and the rest of the world would remain an issue for both airlines.

So while the UK-owned airlines can mitigate some of the direct effects, they have clearly still been affected. Significantly, their Irish rival Ryanair – also exposed to the UK-specific effects, but less exposed to the wider EU rights issues – has seen less of an impact on its share price.

There is an urgent need for the UK to replace the traffic agreements that will, potentially, be lost as a result of Brexit, and it seems pretty obvious that the UK should seek continued membership of the ECAA. But it is far from clear that the UK can achieve this without signing up to common technical rules and without making significant concessions on economic integration.

The price of re-entry

The requirement that UK (re)sign up to a wide array of common regulations on safety, security, etc., is probably the least challenging obstacle. This might seem to run contrary to the desire expressed in the Leave campaign to free the UK from EU “red tape”. However, it hardly seems plausible that the UK would seek a bonfire of safety standards in aviation to make a point about sovereignty. And since much European regulation comes down from ICAO, it in practice applies whether the UK is in the EU or not.

A greater obstacle is the requirement that members establish a “framework of close economic cooperation” with the EU. So the central issue of the UK’s attitude to the free movement of labour could yet impede its ability to stay within the ECAA.

And there is a further risk. The ECAA is a multilateral agreement between the EU and its members, which means that – at least in theory – the UK’s membership may be blocked by any other member. One such might possibly choose to block membership with the idea of protecting its domestic airlines from more intense competition.

Alternatives

If the UK does not seek, or fails to gain, entry to the ECAA, other avenues are still open to it. It could negotiate a bilateral open skies agreement with the EU. Switzerland is not part of the ECAA, but enjoys virtually the same status by virtue of such an arrangement. However, it should be noted that this agreement is closely tied to other agreements concerning economic integration.

A further option would be to negotiate bilateral deals with individual EU countries. But the practical challenges for the...
The Implications for Airports & ACI EUROPE’s Position

The fallout from Brexit is potentially very serious, for airports both in the UK and across the EU. In the immediate term, the feared initial ‘shock’ impact has so far not materialised, with passengers continuing to fly. ACI EUROPE traffic figures for July 2016 show healthy growth of +6.8% for the EU overall and +5.6% for the UK. Traffic data for August released by individual UK airports has also largely been quite positive, with several airports big and small, reporting double-digit growth in passenger numbers.

Despite a softer initial impact than previously forecast, the longer-term uncertainty and the potential repositioning of the UK within or outside the single aviation market will unquestioningly hit airports. UK airports which are more dependent upon the airlines identified in Dan Elliott’s analysis will, of course, be most directly impacted. However, unlike the airlines, these airports – being inherently immobile – do not have anywhere near the same freedom to take mitigating action.

Beyond the UK, those airports that are dependent upon inbound UK traffic are potentially most exposed (e.g. certain sun holiday destinations in south of Europe, airports in countries with close trading relations with the UK). This would be the case with respect to both post-Brexit currency movements, but also in terms of longer-term changes to the single aviation market. Regional airports both in the UK and across the EU are also likely to be most at risk.

ACI EUROPE is extremely aware of the threat Brexit posed to airport members. To date ACI EUROPE is the only European aviation trade association which has formally called for the UK aviation market to remain integrated with the EU aviation market based on fully aligned rules, issuing a press release on 24 June to this effect. ACI EUROPE strongly believes that this is in the best interests of the European aviation industry.

ACI EUROPE has also been consulting closely with industry partners over the past month, and is in particular cooperating closely with Airport Operators Association (AOA) – the national association for UK airports. Special updates have been sent specifically to UK airports, and a ‘Brexit Workshop’ is currently being organised for members, on 2 December in Brussels.

The situation is expected to remain unclear for the foreseeable future. ACI EUROPE will continue to monitor developments very closely, and will offer a strong voice in favour of maintaining an integrated European aviation market, in any future negotiations.

Conclusions

For UK aviation, securing its place in the ECAA and in the EU-US Open Skies Agreement would appear to be the key objective for the forthcoming Brexit negotiations. This outcome is important not just to the UK but to consumers right across the EU, to maintain the momentum of growing competition in aviation markets.

As a key first step, the UK should signal early on that it is prepared to continue to conform to all the relevant international standards that underpin the ECAA. The remaining challenge will be to reach agreement on the meaning of “close economic cooperation” in a way that reconciles Brexit with membership of the ECAA. Full membership of the single market is not required, but what needs to be thrashed out is ‘how close is close enough?’

The most important point for all sides to remember is that less competitive aviation markets would mean higher ticket prices for all passengers, not just the British, further reducing demand and connectivity – creating a feedback loop that would damage the European economy as a whole, and in particular those businesses that make most use of aviation.
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Airports and CO₂ – carbon neutrality is going global

As the 39th ICAO General Assembly gathered in Montreal to address emissions from international aviation through a Global Market Based Measure (GMBM), the airport industry has once again demonstrated that it is assuming its responsibility in curbing climate change and contributing to achieving the goal of sustainable and low-emissions aviation. Report by Marina Bylinsky.

In the days before the 39th ICAO General Assembly, the ACI World and ACI North America Annual General Assembly also took place in Montreal, where the annual results of Airport Carbon Accreditation year 7 (June 2015 - May 2016) were released. The announcement highlighted a continued growth in the number of certified airports, as well as a sound carbon performance. In addition, it was the occasion to celebrate a very special moment for the programme – the achievement of carbon neutrality by airports in North America and Asia-Pacific, bringing the number of carbon neutral airports worldwide to 26.

At the end of programme year 7, 156 airports had reached the Airport Carbon Accredited status. This represents a growth of 25% compared to the previous year, when 125 had been accredited. These airports have collectively shown a reduction of 206,090 tonnes CO₂ – a volume of emissions typically released for the energy supply of 86,000 households over one year. Most importantly, certified airports show an improving carbon efficiency of their operations. Thus, whereas their average emissions per passenger have amounted to 2.31 kg CO₂ in programme year 6, they have dropped to 2.10 kg CO₂ this year, representing a reduction of 7%. This confirms an overall downwards trend of emissions per passenger since the launch of Airport Carbon Accreditation, whereas at the same time, the number of certified airports has been growing:

<table>
<thead>
<tr>
<th>Year</th>
<th>kgCO₂/passenger</th>
<th>Number of airports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2.60</td>
<td>17</td>
</tr>
<tr>
<td>2</td>
<td>3.73</td>
<td>43</td>
</tr>
<tr>
<td>3</td>
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<td>59</td>
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<td>6</td>
<td>2.31</td>
<td>125</td>
</tr>
<tr>
<td>7</td>
<td>2.10</td>
<td>156</td>
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Dallas Fort Worth International Airport is the first airport in North America to reach carbon neutral status. Dallas Fort Worth has been covering 100% of its electricity consumption through the purchase of renewable energy.
These results highlight that Airport Carbon Accredited airports are engaged in long-term strategies to achieve more environment-friendly operations, rather than one-off climate initiatives. This is all the more impressive as it’s happening in spite of an increasing demand for air travel.

While the new Airport Carbon Accreditation year has only started in June 2016, it has already been marked by tremendous new developments – in particular in the area of carbon neutrality. The most recently accredited carbon neutral airports are all pioneers of their kind: in Europe, Nice Côte d’Azur Airport became the first carbon neutral airport in France, while Manchester Airport has just achieved the same distinction in the UK. Meanwhile, Dallas Fort Worth International Airport is the first airport in North America to reach carbon neutral status and Delhi Indira Gandhi International Airport is the first one in Asia-Pacific. This means that carbon neutrality has become reality for airports in different world regions. While being very different from one another, these airports share a common understanding of carbon neutrality as requiring an innovative approach to both the supply and the use of energy at an airport.

These airports have been investing in the use of renewable energy: both Nice Airport and Dallas Fort Worth have been covering 100% of their electricity consumption through the purchase of renewable energy. Delhi Airport is directly generating renewable electricity on-site through 7.84 MW solar power plants, which have been the first solar installation of this scale in India. These airports also support the use of alternative fuels or electricity for ground vehicles, and provide airlines with the possibility to use fixed ground power instead of auxiliary power units. In addition to this careful selection of energy sources, they have also been reducing their energy consumption through innovative lighting, air conditioning and heating systems, embedded in terminal buildings favouring energy savings. Manchester Airport has invested more than £7.5 million in energy efficiency projects, working with local and national businesses to develop innovative lighting solutions. The energy management team have installed more than 25,000 low energy LED lights throughout the airport, including the first on any UK runway.

Terminal 3 of Delhi Airport is a LEED Gold certified green building, enabling among others to optimise the use of daylight. Nice and Dallas Fort Worth airports have been implementing dynamic systems allowing them to adjust lighting or air conditioning to the demand, e.g. through dedicated sensors.

With airports being critical nodes in the global air transport network, the adoption of this comprehensive approach to carbon neutrality by airports in different continents is a very encouraging and promising trend for the achievement of carbon neutral growth of aviation as of 2020. By doing so, airports will also play an important role in the functioning of the upcoming GMBM for aviation, by providing an efficient and innovative infrastructure for aircraft operations and thus supporting airlines in reducing their emissions – wherever they fly to.
ACI EUROPE visits Kiev to discuss the EU-Ukraine aviation agreement and Ukrainian aviation policy issues

On 6 October, ACI EUROPE participated in the 3rd International Conference and Exhibition “AeroCongress – 2016” in Kiev, organised by the association “Airports of Ukraine” of Civil Aviation (AAUCA). Director General of ACI EUROPE Olivier Jankovec and General Counsel Gerard Borel presented the European state of the airport industry and provided updates on the EU Aviation Package and the main airport regulatory issues. In the wings of the event, ACI EUROPE also met with Ukrainian Vice-Prime Minister Mr. Vladimir Kistion.

Olivier Jankovec, Director General, ACI EUROPE, with Ukrainian Vice-Prime Minister Mr. Vladimir Kistion.

Minister, Mr. Vladimir Kistion, to discuss the EU-Ukraine aviation agreement, market development and the strategic direction of Ukrainian aviation policy.

In view of the EU-Ukraine aviation agreement, Mr. Kistion reiterated how important it is for Ukraine to get this agreement signed, because it will open new prospects for the development of the aviation industry in the country and the national economy as a whole.

The EU-Ukraine agreement was initialled almost 3 years ago at the Eastern European Partnership Summit in Vilnius, Lithuania. However, ever since then, a territorial dispute over Gibraltar, between the UK and Spain, has effectively deadlocked the agreement’s signature and activation by EU Transport Ministers. As a result, a closer integration of the Ukrainian aviation market into the EU Single Aviation Market remains blocked. This means that airports and airlines on both sides are unable to take advantage of the air route development and traffic growth opportunities afforded by the agreement – with consumers and businesses ultimately being deprived of the benefits of increased and more affordable connectivity.

In a subsequent ACI EUROPE press release, Olivier Jankovec, Director General of ACI EUROPE, commented “the Gibraltar deadlock means we are missing out on opportunities for growth and job creation that Europe so badly needs. With its Aviation Strategy adopted last December, the European Commission has put our sector in the spotlight as part of its focus on growth, investment & jobs – recognising the tremendous value of air connectivity for the economy. In the past, the Gibraltar dispute did not stand in the way and should not now. We need a swift, responsive and responsible solution.”

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In this article, Florian Guillermet, Executive Director of the SESAR Joint Undertaking, describes how SESAR remote tower services are helping regional small and medium-sized airports to stay open for business, and how this technology can be deployed in other airport environments.

**SESAR remote towers at your service**

Regional small and medium-sized airports are lifelines to regional economies, ensuring connectivity and the mobility of people, goods and services. However, these airports, which may deal with only a handful of flights daily, are under growing financial pressure to find ways to maximise their operations and services while reducing fixed costs. One possible cost efficiency gain is air traffic control service provision. Since the traffic volume in these airports often does not justify the cost of maintaining coverage around the clock. And yet, these airports need to continue to offer airlines such requested services in order to stay competitive.

Remote tower technology draws on a range of advanced technologies, including high-definition, infrared and pan-tilt-zoom cameras to provide visual surveillance augmented by available radar and flight data to deliver additional information in real time. With this sophisticated technology, an out-of-the-window view from the tower is captured and reproduced at a remote facility with the level of detail and accuracy required for controllers to provide safe and expedient air traffic control services to visual flight rules (VFR) and instrument flight rules (IFR) traffic. The visual image reproduction is overlaid with information from additional sources, such as secondary radar and automatic dependent surveillance-broadcast (ADS-B), which not only enhances the visual image for use in normal conditions, but provides an enhanced capability for low-visibility conditions. Services are further enhanced through the integrated use of advanced features such as object tracking, motion-based alerting, infrared vision, digital image magnification and hotspot monitoring. In addition, the controllers have remote access to all the necessary controls, including communications, lighting, airport and flight data, as well as meteorological information. Clearly these cutting-edge remote technologies open up many new possibilities; however, ATM modernisation is not about technology for the sake of it.

Instead it is about improving operational performance, and matching operational problems with the best possible technology solution. Furthermore, this concept represents a significant change in the way air traffic services are delivered at airports, so safety concerns must be clearly and unambiguously addressed. This is why at SESAR we have taken a stepped approach to the development of remote tower solutions, responding to the real customer business needs, as well as the operational and safety concerns of stakeholders. At the same time, keeping the human firmly in the loop of our research on remote towers has been key; remote provision of airport air traffic control requires the same controllers with the same capabilities and licensing as at conventionally-manned airports. In a safety-critical industry like ATM, no technology solution can leave the factory without meeting the highest safety standards and receiving a thumbs-up by supervisory authorities, air navigation service providers (ANSPs) and controllers. At the end of the day, these ANSPs and controllers have to trust the technology and feel 100% confident that they can provide flight information and air traffic control services remotely to the same level of safety and efficiency as when performed in a tower made out of bricks and mortar at the airport in question.

SESAR plans to deliver four types of remote tower air traffic service solutions. The first among them is the provision of remote tower air traffic services to a single airport with as few as five flights arriving and departing daily. In a series of real-time simulations and passive shadow-mode trials (i.e. the controllers participating in the validation ‘shadowing’ the instructions given by the operational controllers in the real tower at the airport), controllers used high resolution imagery and enhanced functionalities to provide advisory services to a remote location. Conclusive validation results prompted Sweden to develop and implement the world’s first remotely operated tower at Örnsköldsvik Airport, controlled from the Sundsvall ATC facilities over 150km away. Örnsköldsvik offers vital transport links to local residents who wish to reach Stockholm and further afield. But with just 80,000 annual passengers, the airport cannot justify the cost of full-time control staff. Now, an 80-foot tall mast housing 14 high-definition cameras sends the signal and images back to the controllers at Sundsvall in real time. The facility was fully certified by the Swedish Aviation Authority in 2014, and plans are underway for two more Swedish regional airports to implement the SESAR remote tower solution.

The next logical step was to see if the single remote tower set-up could be used for regional airports with medium-sized traffic volumes. This category of airport is faced with similar challenges as their smaller counterparts in ensuring service continuity or even expansion since conventional towers can become too costly to run over time, or if the number of flights becomes insufficient. Work is underway on a second SESAR Solution with the installation of remote tower technology at Saarbrücken Airport in southwestern Germany near its border with France. The airport reports handling 12,324 scheduled, charter and non-commercial aircraft movements in 2012, and 407,650 total passengers in 2013. Validation work is still underway complemented by a large-scale demonstration in Ireland, and a further demonstration taking place in the Netherlands, Germany and Sweden; these will support the
delivery of this enhanced SESAR Solution by the end of the year.

Having proved that controllers can safely provide air traffic services to an airport remotely, a third SESAR Solution provides simultaneous remote tower air traffic services to two low traffic density airports from a single location. During validations, a control facility at Bodo in Norway provided controllers with an out-of-the-window view and working position that supported Røst and Værøy (technically a heliport), and allowed the controller to switch seamlessly and provide aeronautical flight information services to both locations. The almost complete darkness and freezing winter weather conditions really put the technology to the test, particularly the infrared features. Based on the success of this validation work, Norway now plans to deliver flight information services to as many as five small airports from one central facility at Bodo starting in 2017. A large-scale demonstration in Italy also aims to provide complementary proof of the feasibility of the solution, with the simultaneous management, in low traffic conditions, of two airports (Milan Linate and Milan Malpensa airports). Similar and complementary trials are also happening in Budapest, Hungary, where air traffic services are being demonstrated at a multiple runway airport.

Given that the first beneficiaries of remote towers are smaller regional airports, it made sense for SESAR to test the technology first at these locations where the demand was clear and the traffic generally lower. However, there is no doubt that the technology has potential for use at busier airports, for example as a contingency solution for any outages of the services provided for at the tower. The need for contingency towers is, as such, not new, and facilities already operate in many places such as at London, Brussels, and one near completion at Budapest. They provide operational resilience and safety assurance, should the primary tower be compromised. The SESAR Solution brings additional technology into play, and addresses issues including accessibility, training and security to deliver more resilience and a higher efficiency in degraded situations. Shadow-mode exercises looked at exactly how a SESAR remote tower solution can provide contingency services at medium-sized airports, notably in this case Göteborg in Sweden and Costa Brava Airport in Girona, Spain. The exercises also assessed the transition time necessary to switch from the primary tower to the contingency facility, what level of service can be provided in the absence of an out-of-the-window view, and what information can and needs to be accessed by controllers.

SESAR members and partners have devoted significant resources, energy and time to get this far within the first wave of research and development (SESAR 1 2008-2016). But as innovation is an infinite process and with the launch of SESAR 2020 (2016-2020), the next wave of R&D, the plan is to take the technology even further in order to respond to the operational performance needs articulated by stakeholders. Particular focus will be placed on understanding if and how many airports could be controlled by one single controller, the tools needed, the controller working position layout and functions, with integrated short and long-term planning tools. Research will also look at what additional information is required and operational procedures required for timely and easy switching between airports to deliver air traffic services.

Similarly, modules that will increase controllers’ situational awareness and provide for additional alerts for collision avoidance will also be explored. Different types of airports in terms of traffic volumes and types of traffic will be used as test beds for the research, with particular consideration for airports with general aviation, rotorcraft and drone traffic. Working in tandem with the operational and technical systems development, the programme will of course investigate, in addition to safety, if any additional checks and balances need to be in place to safeguard against cybersecurity threats.

So, in a relatively short period time, huge progress has been made on remote tower technology. The potential of this technology goes beyond the original rationale for its development. Larger airports are coming forward expressing an interest in this technology as a supplementary non-cooperative surveillance system for input to advanced-surface movement guidance and control systems (A-SMGCS). In all cases such techniques could be used to cover blind spots and be decision support tools during shortfall conditions. Furthermore, larger airports that currently deploy a manned secondary tower facility could use remote technology to reduce the cost of providing such a facility without compromising safety or efficiency.

Thanks to the results of SESAR’s incremental approach, considerable interest has been generated around Europe and further afield. In SESAR 2020, the number of sites and the number of ANSPs participating in the programme to further develop and deploy the concept has grown considerably and has spread to all corners of Europe. SESAR’s remote tower development programme looks set to revolutionise the way that air traffic services are delivered across Europe, while increasing flexibility and resilience without compromising safety.
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The 26th ACI EUROPE General Assembly, Congress & Exhibition, Athens, took place on 20-22 June. The theme of this year’s event was “There is nothing permanent except change – towards a radical remodelling of passenger & airline customer relationships”. The event attracted over 350 delegates from airports, airlines and ANSPs, as well as other aviation partners and the European Commission.

The Annual Congress also saw the re-election of Augustin de Romanet, President & CEO, Aéroports de Paris S.A.–Groupe ADP, for a second term as President of ACI EUROPE, as well as announcement of the ACI EUROPE Best Airport Awards.

The 27th ACI EUROPE General Assembly, Congress & Exhibition will be hosted by Aéroports de Paris S.A.–Groupe ADP on 12-14 June 2017.

Olivier Jankovec, Director General, ACI EUROPE, delivered his traditional State of the Industry address. He focused on a number of areas, including air traffic developments, economic & financial performance, and changing patterns of airport connectivity. “There is no doubt that hub competition is on the increase, and that there is more to come,” Jankovec commented. “Looking ahead, we are seeing potentially more disruption coming not just from long haul low cost operations, but also from low cost carriers starting to feed into other airlines or even within their own networks. This could bring massive changes to European aviation. Ultimately, it means we are set to move towards a more hybrid airport market.”

Arnaud Feist, CEO Brussels Airport Company, delivered a special keynote presentation & leadership briefing: “The Brussels Airport Attack – and Afterwards.” Brussels Airport won this year’s ACI EUROPE Best Airport Award in the ‘10-25 million passenger’ category, and Feist was the special Leader of the Year Award for his extraordinary leadership and courage together with his remarkable decisiveness and wisdom in managing the aftermath of the terrorist attack at Brussels Airport on 22 March.

Dr Yiannis Paraschis, CEO Athens International Airport, welcomed delegates. “2016 marks two, or should I say three, important anniversaries. It is 15 years since the opening of the airport, and 20 years since establishment of the airport company. Additionally, ACI EUROPE is celebrating 25 years since its establishment. It is, therefore, our utmost pleasure and privilege to jointly celebrate all these years of aviation experience by hosting the 26th ACI EUROPE General Assembly, Congress & Exhibition.”

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In a special keynote interview, Dimitris Gergiannis, Managing Director, Aegean Airlines, spoke about the Star Alliance carrier’s growth, which is many times higher than the market rate. It has launched over 100 new routes since acquiring Olympic Air in 2013.
Dr Stefan Schulte, Chairman of the Executive Board, Fraport, gave a special presentation on ‘Investing in the future of Greece’. Fraport has 40-year concessions to operate, manage, develop and maintain 14 regional airports in Greece. He described this as an “attractive, tourist-driven airport portfolio with further growth potential”.

The two-day exhibition featured a diverse mix of airport suppliers, covering areas including IT solutions, bag tag and bag drop solutions, passenger boarding bridges, airport e-commerce platforms, and infrastructure management systems.

The Gala Dinner took place at The Island and was an opportunity to celebrate ACI EUROPE’s 25th anniversary. The evening also saw the presentation of the 12th ACI EUROPE Best Airport Awards. The winners were: Keflavik Airport (under 5 million passengers), Glasgow Airport (5-10 million passengers), Brussels Airport (10-25 million passengers), London Heathrow Airport (over 25 million passengers), Oslo Airport (Eco-Innovation Award), and Dublin Airport (Accessible Airport Award).

The WBP Recognition Award went to Johan Schölvinck, Vice-President Commercial, InterVISTAS Consulting Group and Vice-Chair, ACI EUROPE Commercial Forum. The Gala Dinner featured a diverse mix of airport suppliers, covering areas including IT solutions, bag tag and bag drop solutions, passenger boarding bridges, airport e-commerce platforms, and infrastructure management systems.

The First Working Session examined ‘New connectivity patterns and the changing relationship between flag carriers and low cost airlines at our airports’. Chaired by Ralph Anker, Chief Analyst, anna.aero, the session featured contributions from Mark Schwab, CEO Star Alliance; Thomas Woldbye, CEO Copenhagen Airports; Kate Sherry, Director of Route Development, Ryanair; Kata Cserep, Vice President, Global Managing Director – Airports, ICF International; and Henrik Mørch, Director DG Competition, European Commission.

The Investors’ Forum discussed how airports are profitably investing, and how the environment for airport investment is evolving in Europe. Chaired by Andrew Blease, Associate Managing Director, Moody’s Investors Service, the panelists included José Manuel Vargas, Chairman & CEO, Aena; Nicolas Notebaert, Chairman, VINCI Airports; Mathias Burghardt, Member of Executive Committee, Head of Infrastructure Group, Ardian; and Ingo Ludwig, Director, Mergers & Acquisitions, AviAlliance.
Brussels Airport won this year’s ACI EUROPE Best Airport Award in the ‘10-25 million passenger’ category in recognition of the passenger experience enhancements delivered by its new central Connector building. A special Leader of the Year Award was presented to Arnaud Feist, CEO Brussels Airport Company, for his leadership, courage, decisiveness and wisdom in managing the aftermath of the terrorist attack at Brussels Airport on 22 March. He spoke to Ross Falconer.

Brussels Airport recognised for true leadership

Brussels Airport responded quickly and efficiently to the terrorist attack on 22 March. "Thanks to a decentralised, rapid and efficient way of working, committed, agile and professional teams, the capacity to make the right decisions even under pressure, and the empowerment of the emerging ‘true leaders’, on 29 March we were operationally ready to restart in a temporary check-in infrastructure with a capacity of 8 million departing passengers per year, proven by a real-life test with 800 volunteers,” explains Arnaud Feist, CEO Brussels Airport Company. "On 2 April the authorities agreed on the restart, and the next day the first passenger flight departed again from Brussels Airport, only 12 days after the attacks, an emotional and rewarding moment for all of us."

Indeed, Feist himself was one of the ‘true leaders’ to which he refers, and was recognised with the special Leader of the Year Award at this year’s ACI EUROPE Best Airport Awards. "I thank ACI EUROPE for this award," he says. "It is very precious to me as it is awarded by my peers in the airport industry. I believe this award is a shared reward for all Brussels Airport teams who have worked day and night to first rescue the victims and help their families, and then to restart airport operations in a safe and secure manner in a matter of days. This award is also associated with all the victims of the attacks – they have a place in our hearts forever."

"Future-proof and technologically-advanced terminal"

Brussels Airport continuously invests in its infrastructure and services. It won this year’s ACI EUROPE Best Airport Award in the ‘10-25 million passenger’ category, with a major factor being the opening of its new Connector building in 2015. This key investment includes Europe’s largest screening platform and the world’s first remote screening of cabin baggages on a large scale. "Connector was built primarily to improve the passenger experience, thanks to shorter walking distances, plenty of daylight on the way to the gates, and reduced queuing times," Feist comments. "Besides Connector, we also further developed our network and invested in improving public transport and parking facilities. This award is very important to us as it recognises the efforts and energy we have invested since several years in the quality of our airport product, in services to our clients, the airlines and passengers, and in the further development of our European and intercontinental network."

The airport recorded the second busiest July in its history, with 2.4 million passengers, in a clear sign that the market continues to recover after the attacks. Passenger traffic has been positively impacted by the strong performance of Brussels Airlines and the low-cost carriers. Meanwhile, the number of transfer passengers continues to grow – up 11% year-on-year in July, in particular thanks to the ongoing development of Brussels Airlines within the Star Alliance network. "This trend shows that international passengers are staying loyal to Brussels as a trusted transfer airport," Feist notes.

As part of Brussels Airport’s continuous investments, it has begun a major runway renovation using energy-efficient materials and techniques. For example, the asphalt that has been removed will be crushed for reuse in the foundation, while energy-efficient LED lighting will be installed instead of halogen lamps, saving 597,600 kilowatt hours of electricity per year.

Brussels Airport launched its ‘terminal of the future’ project the day after the 22 March attacks. “This project was not planned for a few years, but we thought it was important right after the attacks to give a hope, a vision that we would soon be back and even stronger,” Feist explains. "Check-in procedures are evolving and we want to create a future-proof and technologically-advanced terminal for our passengers."

Looking ahead, Brussels Airport is developing a strategic vision for what it will look like in 2040, examining the challenges it will face and how it can continue to play a key role as an economic powerhouse for the country.
Heathrow is proud to announce that we have won ACI Europe’s 2016 Best Airport Award (over 25 million passengers) for the third time. This is a great testament to our 70 years of continuous improvement and our determination to make every journey even better for our passengers in the future.
London Heathrow Airport certainly enjoyed a positive first half of 2016. In addition to winning the ACI EUROPE Best Airport Award in the ’over 25 million passengers’ category, it achieved a record Airport Service Quality score. Passenger numbers were up 0.6% to 35.7 million in the first half of the year, and cargo volumes increased by 17% with Heathrow’s links to fast-growing economies boosting British businesses.

“Heathrow has been named the best major airport in Europe for the third time and I am very proud of the work our colleagues do every day while giving better value to passengers,” explains John Holland-Kaye, CEO London Heathrow Airport. “As the UK’s biggest port, we are supporting businesses from every corner of Britain to get their products to global markets, with cargo volumes up by almost 2%. Now Britain needs a positive post-Brexit plan and only Heathrow expansion will help Britain to be one of the world’s leading trading nations – connecting all of Britain to global growth. Heathrow has a new plan for expansion, allowing the Prime Minister to make the right choice in the national interest.”

This plan aims to get the UK regions connected to growth quicker and give all of Britain a ‘Brexit boost’. It includes proposals for up to 25,000 more air traffic movements a year on current operational levels, while a third runway is being built – adding an additional £15 billion (€17bn) to the economy between 2021 and opening of the third runway in 2025. The measures, which are subject to consultation, include working with the UK Government to ring-fence early capacity for domestic flights and long-haul routes to growth, such as new domestic connections to Humberside, Dundee, Newquay or Liverpool, and new long-haul trade routes to growth markets like Osaka, Kochi, Wuhan and Quito.

To help establish new domestic connections, Heathrow is proposing an extension of its existing £10 (€11) ‘domestic passenger discount’ for all flights to UK airports until 2037, as long as there is justification and it is deemed to be in the public interest.

Research by Frontier Economics identifies 40 new long-haul trading routes that could be made possible with Heathrow expansion, and also suggests an expanded Heathrow could unlock nearly £60 billion (€66bn) of growth over the first 15 years of Brexit.

“This Brexit Boost Plan is our commitment to making Britain stronger and fairer for everyone – faster,” says Holland-Kaye. “Our proposals for an additional 25,000 flights a year from 2021 would help businesses and families from Newquay to Dundee benefit earlier from Heathrow expansion, while protecting our commitment to meet and exceed the Airports Commission’s environmental conditions.”

Heathrow was commended by the ACI EUROPE Best Airport Award judges for its environmental initiatives. The airport is accredited at Level 3 Optimisation of ACI’s Airport Carbon Accreditation, and recently launched its second ‘Blueprint for Noise Reduction’.

“Heathrow shares a common objective with local residents: we want to make the skies around us quieter,” Holland-Kaye comments. “The arrival of new, quieter aircraft and the start of our programme to install 50 new noise monitors will help us to accelerate the reduction in the noise impacts of Heathrow. Our new plan for a third runway means that we will reduce the number of people affected by noise even with expansion, while increasing the social and economic benefits that Heathrow provides.

Heathrow’s plan to give Britain a ‘Brexit boost’
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Glasgow focused on delivering a memorable customer experience

Amanda McMillan, Chief Executive of AGS Airports Ltd and Managing Director of Glasgow Airport, received the ACI EUROPE Best Airport Award in the ‘5-10 million passenger’ category from Angela Gittens, Director of Glasgow Airport, received the WBP Recognition Award from Catherine Mayer, Vice-President, SITA.

Glasgow Airport crowned its 50th anniversary year by winning the ACI EUROPE Best Airport Award in the ‘5-10 million passenger’ category, receiving praise from the judges for enhancing its facilities, improving the passenger experience, and securing a host of new routes and services.

“At Glasgow Airport we see it as our job to inspire travel and we believe we do that through two key ingredients – destination choice and unrivalled service,” says Amanda McMillan, Chief Executive of AGS Airports Ltd and Managing Director of Glasgow Airport. “I think the Best Airport Award recognised our achievements in both areas. Over the course of the past two years we have secured almost 50 new routes and services, however, it has always been our belief that growing our route network will not in itself ensure our success. Like all service-oriented businesses, much of our reputation depends on our staff. We have worked extremely hard to instil a unique one campus culture whereby everyone, regardless of who they work for, understands the importance of delivering a memorable customer experience.”

In addition to securing almost 50 new routes, Glasgow Airport has committed £40 million (€44m) to enhancing its facilities which has resulted in a much-improved passenger experience. It has invested £500,000 (€550,000) in refurbishing the dedicated passenger lounge, the Upper Deck, and £3.3 million (€3.7m) in extending the east pier, which created new boarding areas for passengers. This coincided with a large scale airside terminal remodel programme, including the arrival of a number of new catering and retail facilities.

“Our success depends on the energy, talent and commitment of everyone who works on the airport campus. Alongside our investment, we have maintained a relentless focus on delivering excellent service and ensuring all our employees view their role as ‘more than a job’. “We have created a unique culture whereby everybody takes great pride in their work. We believe we have the ingredients to balance scale with the personal touch, which will stand us in good stead when we enter the next category and give the larger airports a run for their money.”

Analysing the airport commercial business

The WBP Recognition Award this year went to Johan Schölvinck, Vice-President Commercial, InterVISTAS, Consultant for NACO and Vice-Chair of the ACI EUROPE Commercial Forum, who was recognised for his outstanding airport industry expertise and strong commitment to the ACI EUROPE Commercial Forum’s Business Transformation Task Force.

He described the award as a big surprise and thrill. “The airport world is a closely knit family,” Schölvinck says. “For a consultant it takes a lot of time and energy to build up the expertise, network and trust required to win projects and add value to your clients. It’s a people business. You have to be active and connect people, listen to them and share knowledge. Giving is more important than taking. A consultant’s business life can be lonely, as you move in and out of projects and are not part of the client’s organisation when it celebrates the end result. So the group of colleagues on the ACI EUROPE Commercial Forum is very important to me.”

The aim of the Business Transformation Task Force is to understand and analyse the airport commercial business, and the way it is transforming. “As Vice-Chair of the Commercial Forum, an honour for two years, I led this task force and introduced a planning process called ‘the Art of Choosing’,” Schölvinck explains. “15 Commercial Forum members actively contributed. We generated ideas and options, kept focus and worked our way through diagnostics, challenges and recommendations – a very democratic and fun exercise. We presented the results to the ACI EUROPE Board of Directors last January. The goal mattered, but the road was equally important. I guess that is what is meant with interpersonal skills and the ability to lead and inspire. Of course, the Commercial Forum is more than this task force. Another one on airport loyalty systems was led by my friend and chair- man Marc Brissac of Toulouse Airport, who is so positive and guides the Forum so well. A task force on real estate is chaired by my energetic friend Arturs Saveljevs of Riga Airport. More and more ACI member airports and World Business Partners are enthusiastic and want to contribute to the Forum, which is what it’s all about.”
Reliable partner for value-added automated baggage handling solutions

Vanderlande designs, builds and services baggage handling systems for airports of all sizes. Relied upon by more than 600 airports, from regional to large international hubs, Vanderlande is the world’s leading baggage handling solution provider. Vanderlande has proven its reputation as a reliable partner for value-added automated baggage handling solutions. This partnership covers not only the turnkey delivery of high-quality baggage handling systems, but also includes intelligent software solutions and life-cycle services.

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Keeflavik emphasises ongoing improvement of services

Keflavik Airport won the ACI EUROPE Best Airport Award in the ‘under 5 million passengers’ category. The judges highlighted its investments to improve operations and enhance the passenger experience, its involvement with the local community and stakeholders, as well as its environmental policy. “We are very proud of the award and believe that this is the result of the emphasis we place on the ongoing improvement of services to our passengers and other users of the airport,” comments Björn Óli Hauksson, CEO Isavia. “Therefore, we support the efforts of the service providers at the airport to give the best service and facilities. To help them, we are working on implementing the latest technology to streamline the passenger experience. In times of very rapid traffic increase at the airport, this has been a challenge. Another factor is the big infrastructure and environmental project we are currently undertaking. All of this wouldn’t have been possible without the great work of our ambitious and hardworking staff, and great cooperation with the airlines, and other service companies at the airport.”

Oslo recognised for pioneering biofuel project

This year’s Eco-Innovation Award, which is awarded by the independent Advisory Board of Airport Carbon Accreditation, went to Aivar’s Oslo Airport. The airport is certified at Level 3+ Neutrality of Airport Carbon Accreditation and was recognised by the judges for its pioneering project to establish a regular supply of bio jetfuel to all customer airlines since January 2016, making it the first airport in the world to offer this service through the normal supply mechanism. Through this project, Oslo and its partners contribute to the overall sustainability industry goals as defined by the Air Transport Action Group (ATAG), in particular carbon neutral growth as of 2020 and reducing CO2 emissions by 50% by 2050. “We are thrilled and proud to get this recognition for our important environmental efforts here at Aivar’s Oslo Airport”, says Dag Falk-Petersen, CEO Aivar. “Delivering aviation biofuel at Oslo Airport is an important step towards carbon neutral air travel. When we started offering aviation biofuel in January of this year, the intent was to show that it’s actually feasible. Being an inspiration for airports worldwide is certainly a desired effect of our pioneering efforts.”

Dublin Airport wins Accessibility Award

To mark the 10th anniversary of the adoption of Regulation (EC) 1107/2006 concerning the rights of disabled persons and persons with reduced mobility when travelling by air, ACI EUROPE partnered with the European Disability Forum (EDF) to present a new award: The Accessible Airport Award. This aims to honour the best airport in Europe in terms of its level of accessibility, as well as the range and quality of assistance services that it offers.

Dublin Airport won the award for its excellent accessibility features and facilities, including adult changing places, two separate relief areas for guide dogs, and fully accessible retail and catering areas. “We are absolutely delighted to win this prestigious award for accessibility ahead of all our European peers,” comments Vincent Harrison, Managing Director, Dublin Airport. “This award recognises the significant efforts that the Dublin Airport team makes on a daily basis to ensure that disabled passengers and those with reduced mobility have the best possible airport experience. Winning this prize is a major endorsement for what we have achieved in this area to date, and will encourage us to continue to improve the service that we offer to our disabled customers and to travellers with reduced mobility.”
An urgently-convened special summit of airports, security agencies and senior transport administrators called to safeguard airports against ongoing threat.

CEO ACCOUNTS OF THIS YEAR’S TWO MAJOR AIRPORT ATTACKS:

Arnaud Feist, Chief Executive Officer, Brussels Airport Company

Dr. Sani Şener, CEO, TAV Istanbul Atatürk Airport

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Pegasus “preparing for next phase of growth as pioneering regional player”

Mehmet Nane, CEO Pegasus Airlines, interviewed by Ross Falconer.

Pegasus Airlines launched as a scheduled low-cost carrier in 2005 founded on the belief in ‘everyone’s right to fly’, and over 10 years has created a large and rapidly-expanding network achieving significantly above-market-average growth. Today, it serves 102 destinations in 40 countries: 33 in Turkey and 69 across Europe, Middle East, North Africa and Eurasia.

Mehmet Nane took over as CEO of Pegasus Airlines in March 2016. “We have come a long way and reached many important milestones in the company’s history, with many more to follow,” he tells Airport Business. “Since I started my position as CEO, we took delivery of the first order of 100 next-generation Airbus, becoming the first airline in the world to operate a CFM Leap-1A powered A320neo.”

Indeed, this new aircraft is the backbone of Pegasus’ ambitious expansion strategy. “Our priorities for 2016 are to focus on delivery of the rest of our Airbus A320neo aircraft,” he says. “Our long-term ambitions are to continue to grow across our network, including boosting point-to-point flights between regional cities, as our position as a leading regional airline strengthens.”

Of course, it is a challenging time for Turkey, as is the case for the global travel industry and the world as a whole, but Nane speaks optimistically about the resilience of the region. “Istanbul is the heart of Turkish aviation, and the city is on the crossroads between Europe, Asia, Africa and the Middle East, which makes it a very significant hub for aviation,” he says. “It’s Istanbul’s advantageous geographical positioning translates to a hugely growing transit business, and this is reflected in our strong transit guest numbers.”
In the first six months of 2016, Pegasus carried over 3.92 million transit guests – 2.17 million on international routes and 1.75 million on Turkish domestic routes. This means 28.93% of all guests carried on international routes were in transit, while the figure was 12.64% in transit on domestic routes.

Furthermore, our strong large domestic market is what differentiates us from EU countries and keeps us resilient to the international market that has been heavily impacted by the challenging conditions of late,” Nane adds. “During such times of international market fluctuation, a strong domestic market acts as protection and our robust status as a key player in this market has kept us strong.”

Pegasus achieved 13.1% growth in passenger numbers on domestic routes between January and July 2016, carrying 8.61 million. Domestic traffic also accounted for almost 14 million out of its total of 22.3 million passengers in 2015.

In order to remain competitive in the LCC market, the airline constantly strives to innovate and transform. “We use technology to keep our competitive edge with our strong focus on investment and innovation: tech, fleet, customer relations, safety, training, and ramp services, for example,” Nane explains. “We are confident that the future holds positive developments for Turkey and the global tourism market. We anticipate improvements in the coming periods and a strong, stable, dynamic future returning.”

“The launch of an exciting new era”

The fleet is, of course, one of Pegasus’ most valuable assets, and it has one of Europe’s youngest fleets with 76 aircraft at an average age of 5.4 years. In July 2016 it received the first of 100 Airbus A320neo aircraft (75 confirmed orders and 25 options). It will take delivery of nine CFM-LEAP powered A320neos this year. “They represent the new face of Pegasus, marking the launch of an exciting new era for us, where we will be implementing our next stage of growth as a leading and pioneering regional player and low-cost carrier,” says Mehmet Nane, CEO Pegasus Airlines.

In July 2016 Pegasus received the first of 100 Airbus A320neo aircraft. “They represent the new face of Pegasus, marking the launch of an exciting new era for us, where we will be implementing our next stage of growth as a leading and pioneering regional player and low-cost carrier,” says Mehmet Nane, CEO Pegasus Airlines.

Despite the challenges of 2016, Pegasus remains on target to surpass its 2015 passenger total of 22.3 million to reach over 24 million this year. Its biggest source of growth is the new markets it is penetrating in Russia, the Middle East, Africa, the Caucasus and Eastern Europe. “We will offer these new regions the combined advantages of the Pegasus model, including new aircraft, better on-time take-offs and affordable prices,” Nane says. “While the rise of LCCs worldwide has largely been based on point-to-point services, our additional growth potential arises from us being a hub between East and West, North to South, which allows us to unite continents and destinations many other low-costs don’t reach.”

Alongside network expansion, Pegasus is also focusing on increasing frequencies on some existing routes – for example, it now flies double-daily to Cologne, Düsseldorf, Frankfurt, London Stansted and Paris; 17 times weekly to Amsterdam; and 14 times weekly to Beirut. As fast as it can obtain traffic rights from the Civil Aviation Authority, Pegasus will continue to launch new routes, increase frequencies and maintain steady growth.

“Looking ahead, our mission for 2017 is focusing on the optimisation of our three key pillars to build a solid base for further growth next year and beyond: the guest experience, strong operations, and sustainability for the environment and for all our stakeholders,” Nane concludes.
Writing travel retail history of tomorrow – since 1879.

The international travel retail market is more dynamic than ever. New challenges, as well as constantly changing customer needs, call for innovative thinking and flexible action. For more than 135 years, Gebr. Heinemann has asserted itself at the top of the modern travel retail market and set new standards again and again – all the while remaining a traditional and independent family business.
ACI EUROPE 25th anniversary
Miguel Leitmann, CEO Vision-Box

2016 is ACI EUROPE's 25th anniversary year. Here, a selection of airport members and World Business Partners offer their congratulations, share their thoughts on the evolution of the airports sector over the past 25 years, and look ahead to the next 25. Report by Ross Falconer.

How long has your organisation been a member of ACI EUROPE?
Vision-Box has been collaborating closely with ACI EUROPE for many years and recently joined as a Gold Member. We have been actively participating on a regular basis in exhibitions around the world promoted by ACI and contributing to an open discussion about the future of air travel from a user-centric perspective. This year is no exception, as we will be joining several ACI events and initiatives worldwide.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?
On behalf of Vision-Box, I would like to congratulate you on this special milestone. We are proud to be working together with such a renowned organisation and thankful for the contribution of ACI to an open debate towards the definition of standardised airport processes in the aviation industry. We are enthusiastically working with ACI and its members in order to create a lasting legacy, providing a better world to society through ground-breaking innovation made reality around the globe.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?
In the last decade, we have witnessed remarkable efforts to improve the situation. Vision-Box, in particular, has been providing self-service solutions for automated border control. More recently, we have delivered Happy Flow, an orchestrated platform for a seamless end-to-end passenger journey, which uses biometrics as the unique identification token, allowing passengers to go from the curb to boarding without any documents or human assistance.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?
In the medium-term, airports, airlines and governments will rely on an open services platform where they can offer services, collaborate and create real time business rules about passenger flow, thus obtaining actionable intelligence to reach out to customers with the right context, optimise their operations in real time and enhance security, without compromising passenger privacy or information security. That is exactly where Vision-Box is focusing, contributing to the ultimate goal of providing a superior passenger experience, while bringing early adopters to the forefront of passenger innovation.

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Airports will go from being a stressful place you need to go through when you fly, to a pleasant place you want to go to whether you are flying or not: a shopping mall with runways. In today's world, such transformation will require airports to find an optimal compromise between passenger experience and security.

Our vision of the airport ecosystem of the future relies on the concept of a single biometric token as the enabler of self-service seamless flow and access to goods and services. We strongly believe self-service through biometrics will become the de facto standard. In a very near future, the vast majority of passengers will be using a mobile app to interact with the entire travel experience and associated services. They will enroll their biometrics on the move and link it to an officially verified identity, for subsequent seamless face authentication at the various checkpoints in the airport.

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Airports have gone a long way in 25 years. Widespread internet access, web technologies and mobile phones have had a tremendous, positive impact in the way passengers experience their travel and have raised the bar on customer expectations on seamless flow.

At the same time, especially since the 9/11 tragic events, we have seen an increase in terrorism threats in the aviation sector, as well as strong migration flows, putting additional pressure on airport security and border control.

The aviation industry has responded appropriately to the security challenges and the market has been working very well in bringing more accurate, reliable and affordable solutions into existence. The passenger experience of the end-to-end journey, on the other hand, has suffered considerably.

25 YEARS OF ACI EUROPE

Autumn 2016
MICHAEL GARVENS, CEO COLOGNE BONN AIRPORT

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

Congratulations to ACI EUROPE on 25 years! Aviation means challenge. In an extremely dynamic market environment, which is increasingly being influenced by state regulation and competitive restrictions, that challenge will not diminish. Europe’s airports need a common level playing field to be competitive. For that we need a strong airports federation in the future too.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

Airports used to be sombre waiting rooms with a runway. Today they are multi-modal traffic hubs that are perfectly networked with other transport modes and whose terminals lack nothing when compared with modern shopping malls. Passengers here can, for example, book parking spaces online and shop in duty free by smartphone – inconceivable 25 years ago.

How has your own business evolved over the past 25 years and what have been your main achievements?

Cologne Bonn Airport has undergone a rapid transformation. When we entered the low-cost business in 2002, Cologne/Bonn was a sleepy government airfield. Our face has changed strongly since then. We boast modern terminals, a shopping mall, a high-speed rail station and even a long-distance bus station of our own. Our market presence is unique and today we are one of the most important airports for low-cost carriers. Our passenger volume has doubled, in 2016 we are the strongest-growing German airport and we expect over 11.5 million passengers, a new record. And with the arrival of the new Eurowings, we are the only German airport with a low-cost product on long-haul.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

Global aviation will continue growing and the role of the airports as driving forces for growth and prosperity will become still more important. At the same time, megatrends like digitalisation, demographic change, or traffic globalisation require adaptability and innovative power. In the future, passengers will only need a smartphone for everything surrounding flying. We have to prepare ourselves for that now and create the technical conditions for the “Airport of the Future”.

JENS DEGNER, DIRECTOR BUSINESS DEVELOPMENT, GEBR. HEINEMANN

Gebr. Heinemann has been a member of ACI EUROPE since 1991.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

“You have to come to your closed doors before you get to your open doors... What if you knew you had to go through 32 closed doors before you got to your open door? Well, then you’d come to closed door number eight and you’d think, ‘Great, I got another one out of the way’... Keep moving forward.” Joel Osteen

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

European airports have seen tremendous development over the past 25 years, from infrastructure providers to businesses in their own right in a highly competitive market. In parallel, the importance of non-aeronautical revenues for European airports has greatly increased over the years, with airport shopping being a fundamental part of the passenger journey.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

• Establishment of a passenger journey that reflects the needs and demands of travellers using airports, and at the same time improving satisfaction levels and sustainable travelling.

• New partnership models between airports and travel retailers, which will take into account different revenue streams from the digital business.

• Consolidation within the travel retail market will lead to less duty free competitors: the tender model needs to be adjusted.

• Airports, airlines and travel retailers have to work more closely to increase service levels for passengers to make their journey a unique experience.

Gebr. Heinemann is proud to be part of ACI EUROPE and its Commercial Forum to further contribute to the provision of a high-class travel retail offer at European airports.

Airport Business Autumn 2016
A single biometric token is worth a million dashboards.

Where are passengers spending their time at the airport? Have they crossed immigration yet? Are there any passengers representing risks? These are just some of the questions that Orchestra™ is ready to answer.

A comprehensive passenger flow infrastructure, Orchestra™ is the new common-use based suite for advanced customer-focused managed services and enhanced decision-making, aggregating valuable actionable intelligence tools for improved decision making.

Revolutionizing the relationship between passengers, the airport, airlines and border authorities, Orchestra™ takes advantage of an ubiquitous single token end-to-end passenger journey to make use of newly unveiled actionable data and to implement a cross-collaborative, intelligence-led airport management model.

Are you ready for the airport of the future?
DR. SANI SENER, PRESIDENT & CEO, TAV AIRPORTS

TAV Airports has been a member of ACI EUROPE since 2008.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

ACI EUROPE is so much more than learning about the European aviation industry. It is an organisation designed to help airports and traffic evolve diligently through education, experience sharing, connection building and lobbying. Looking back over the past decade, I am amazed by the dedication, the efforts and time spent by the ACI EUROPE committee members to fulfill the commitment to develop a better aviation industry. I look forward to many more years of growing with ACI EUROPE and encourage other airports to join. It is an organisation that I am truly proud to be a Board Member of.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

We’ve experienced big changes in the European aviation market over the past 25 years. We’ve seen a big wave of liberalisation in Europe in the 90s. Europe has become a single aviation market for most of the airlines. Emerging markets in Eastern Europe have shifted traffic growth to the east. Then came the rapid growth of LCCs and higher security concerns. That’s a lot of change and a lot of challenge for such a short period of time. Airports started focusing more on efficiency-building in operations and generating revenues elsewhere, mostly in the commercial area.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

The rising middle class in the emerging countries will drive the bulk of global traffic growth. With the shift of economic growth to eastern countries, there will be mega hubs in the Middle East and Asia to meet the aviation needs of the new middle class.

JULIAN DIAZ, CEO DUFRY

Dufry’s membership of ACI EUROPE dates back to 16 January 1992 when Weitnauer joined. The major companies Dufry has acquired have also been long-standing members, and Dufry continues to be an active World Business Partner.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

ACI EUROPE is to be congratulated on giving Europe’s airport network a clear, consistent and authoritative voice. This has been instrumental in enabling much of the growth which companies – whose business is closely linked to the aviation ecosystem – have benefited from.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

The airports industry has seen phenomenal change and growth over the past 25 years. Over this period air travel has been ‘democratised’ by the additional capacity and competition to the flagship carriers posed by the low-cost airlines. As the cost of air travel has decreased and peoples’ horizons have broadened, airports have become connectors for people visiting friends and families, discovering new countries and cultures, as well as facilitating business travel. In this sense they are a unique ‘cosmopolitan crossroads’ for flows of people, never seen before in such quantities. Airport retailers have grown their businesses by bringing aspirational brands to a truly cosmopolitan audience. They have played their part in delivering the revenues that airports need to continue to expand their services, which in turn connect people across the globe.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

We continue to see great potential to further increase the airport’s attractiveness as a shopping and meeting centre. Visiting an airport should be developed even more into a pleasant moment in life, where visitors enjoy spending their time and are open to exploring new offers and experiences.

Most passengers from mature countries are accustomed to basic levels of service, but they will need to enjoy more freedom, flexibility and customer support systems. Some will want higher levels of personalised services and will require airports to differentiate services on value and quality of experience.
Where everything takes off
Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

Of course, we would like to congratulate ACI EUROPE on reaching this milestone. This longevity demonstrates that they truly add value to their membership and we wish them well for another 25 years and beyond.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

It has been almost a revolution as opposed to an evolution in that airports, having been mainly redundant pieces of infrastructure, have had to become more diversified, competitive, and had to invest heavily thanks to ongoing regulatory changes, often relating to safety. At the same time, airlines have tried to squeeze down what are good value airport charges, prompting airports to get into the travel retail business. Perhaps most significant is that, in order to keep up-to-date and relevant, many airports in Europe are now in private hands given the cost burden on keeping airports open and to cope with the growing number of passengers. We see this as a positive change because we have become businesses in our own right, having to be commercially astute, while keeping a focus on service and maintaining shareholder satisfaction.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

We would like to see more airports moving into private hands, because it is hard to compete with loss-making and subsidised airports sometimes and this is painting a false economy for would-be airlines interested in operating to your airport when they compare fees for example. We believe ACI EUROPE can help achieve this with its ongoing efforts to support members in being able to operate as businesses who make the necessary high investments to operate and maintain their infrastructure, while trying to make a fair margin instead of being drawn into continued loss-making operations. Regulation can also play a part if it is fair and equitable.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

Congratulations to ACI EUROPE on achieving this major milestone. Over the past 25 years there has been a tremendously positive change to the airport industry in Europe, and ACI EUROPE has been instrumental in driving that transformation. The organisation has always been a vital partner to SITA and the wider airport community, working together to address some of the biggest challenges facing the industry.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

In the past 25 years alone, global passenger numbers have more than doubled. During this time technology has driven down costs while income and wealth levels around the world have steadily grown, putting air travel within reach of an increasing number of people. At the same time, we have seen the emergence of low-cost airlines opening new destinations across Europe, as well as new powerful airlines from Asia Pacific and the Middle East that have established large European networks.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

Building bigger airports is no longer the silver bullet to managing surging passenger numbers. The modern passenger wants to spend as little time passing from kerb to gate, while eliminating the stress of check-in, immigration and security. They are also increasingly demanding that airport information be put at their fingertips. At the same time airport operators are looking for better, more efficient ways to provide a seamless service to a growing number of passengers, in the most cost-effective manner. These demands and expectations are changing the way airports are designed and the technology that is required to manage the airport of the future.
YOUR PARTNER MOVING ALONG WITH YOU

Millions of travellers enjoy the comfort of our services worldwide. We know that each one of you has specific needs and expectations.

“Feeling good on the move®”
is our new slogan, meaning we believe in a traveller-centric philosophy that aims to deliver to travellers an enjoyable and comfortable experience.

As market leaders we bring high quality food & beverage solutions, adding a few special ingredients: passion, care, knowledge and commitment.

30 countries
+ 300 brands
148 airports
52 railway stations
700 motorway service areas
70 locations managed in towns, shopping malls and other venues.
JULIAN JÄGER, MEMBER OF THE MANAGEMENT BOARD, VIENNA AIRPORT

Vienna Airport is a founding member of ACI EUROPE since 1991.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

ACI EUROPE has accompanied the aviation industry since its founding in 1991. The entire sector, and thus Vienna Airport as well, has been confronted with steady change and growth. We wish ACI EUROPE all the best for the future and look forward to exciting years ahead and a continuation of our good cooperation.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

The aviation industry has changed enormously over the last 25 years. Since 1991, passenger volume at Vienna Airport has increased more than fourfold, from about 5.5 million to 22.8 million. Vienna Airport has adapted its capacities to this passenger growth on the basis of the new Terminal 3, the renovated Terminal 1 and Pier West, and the highest tower in Central Europe. Thanks to our terminal development programme, in which we will invest €500 million, we are on the right track towards preparing ourselves for future developments.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

One strategic issue is the development of long haul routes, where we have noticed a strong increase in recent years. Strengthening short and medium haul services is also still important. As the Eastern European market is difficult at the moment, we expect strong growth in the low-cost segment in the coming years. Interesting markets could be Asia, including Hong Kong, and destinations in South America. On the other hand, we are following our Airport City strategy and the results are quite positive: An international logistics investment is about to be finalised, adding up to 40,000sqm of new building infrastructure close to the airport. Furthermore, we re-purchased properties of more than 25,000sqm in the core area of Vienna Airport. In turn, this will serve as the basis for the start of a future real estate development project within a short time.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

ACI EUROPE is the key professional association supporting airports and all of the companies that operate in the airports industry. Our mission – “feel good on the move” – is perfectly fitting, and with ACI EUROPE we aim to support a radical service evolution that goes with the air transport development. ACI EUROPE is one of our most important partners and reference points to support our continuously evolving industry. I wish for ACI EUROPE to continue to lead and support this industry for many years to come.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?

The evolution of the airports industry in Europe over the past 25 years has opened new opportunities, and is also one of the most important developments business-wise. I would compare the development of air travel only with the development of the digital industry. There are new challenges too, as airports have transformed into places with a high level of security, places where travellers have to be served with maximum effectiveness, and offering maximum services to make travellers feel good in their overall airport experience. The food service industry has to adapt along with airports, and grow and change with them, along with demographic changes in today’s world.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?

The continuous evolution of the airports industry, and increasing global mobility and airport traffic, will make more and more airports places where people will pass a lot of time. The evolution of the airports industry will open up new business opportunities, both for retail and food service businesses. Autogrill’s vision of this evolution is that airport restaurants will move even more towards a true and meaningful experience for our guests, driven by engagement with them, while taking care of environmental and business sustainability.

Digitalisation is another key pillar of our vision.

EZIO BALARINI, CHIEF MARKETING OFFICER, AUTOGRILL

Autogrill has been a member of ACI EUROPE since 1996.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?

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Increasing Connectivity
at Airports

Our mobility solutions at airports, such as boarding bridges or the new high-speed ACCEL transportation system, allow people to move more quickly, safely and comfortably.

www.thyssenkrupp-elevator.com
SARA BRESEE, CHIEF MARKETING OFFICER, MORPHO DETECTION

Morpho Detection has been a member of ACI EUROPE for several years.

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?
Congratulations and best wishes on 25 years of continued success! At Morpho Detection, we appreciate the critical insights and updates related to the European civil aviation industry that ACI EUROPE provides. We also see the strategic importance ACI EUROPE has brought by creating a platform through which industry participants can exchange knowledge, influence policy, and develop innovative solutions to make travel safer and more enjoyable.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?
The growing needs for airport infrastructure could only be satisfied with
Europe’s strategic location as a cultural and transportation hub. Leaders in the European aviation industry have demonstrated a long-term vision by making unprecedented investments in airport infrastructure. For example, Frankfurt Airport is embarking on a multi-billion dollar expansion to add a third terminal, complementing a complex and integrated network of air cargo, rail, and road connections. In parallel, European policy and aviation leaders are also accelerating investments in threat detection technology to better ensure safety and meet the challenge of increasing terrorist activity. One significant investment that will impact all airports in Europe over the next several years is the move towards Standard 3-compliant hold baggage screening systems.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?
Airports are going to continue to evolve and become hubs of connection for travellers around the world. As technology advances, we’ll see new ways to share critical data, create greater efficiencies, and deliver the ultimate customer experience. A key part of that experience is ensuring the safety of passengers. When regulators, airport authorities, and strategic technology innovators come together, we can all ensure intelligent data gathering and sharing. We hope to work together on new detection solutions with the flexibility and scalability to meet these and future threats without disrupting passenger and commercial operations.

ALEXANDER PFURR, CEO AIRPORT SYSTEMS, THYSSENKRUPP ACCESS SOLUTIONS

Do you have a message for ACI EUROPE as it marks its 25th anniversary this year?
The well-managed growth of the airport industry has only been possible with the ACI EUROPE movement.

What are your thoughts on the evolution of the airports industry in Europe over the past 25 years?
The growing needs for airport infrastructure could only be satisfied with
private investors and public-private partnerships.

How has your own business evolved over the past 25 years and what have been your main achievements?
Thyssenkrupp Airport Systems has been growing in line with the airport industry to be a major supplier for passenger boarding bridges, related equipment and airport services, constantly improving the movement of passengers in comfort and safety.

What are your hopes and expectations for the continued evolution of the airports industry over the next 25 years?
Being able to manage the continuing growth in a coordinated and environmentally-friendly way.
WARM WELCOME - IT’S IN OUR NATURE

BEST IN EUROPE

Keflavik International Airport is the primary gateway to Iceland and has received numerous awards for service excellence. We have been selected the best airport in Europe three times in the last 6 years and have consistently ranked among the top 5 airports in Europe in terms of service. In 2015 we welcomed 4.9 million passengers that travelled via the airport and in 2016 we expect 6.7 million passengers, an increase of 37%.

At Keflavik airport, you can rely on a genuine Icelandic warm welcome

WWW.KEFAIRPORT.COM
Keflavik Airport delivering “best possible service in times of rapid passenger growth”

Keeflavik Airport has experienced a rapid increase in traffic in 2016, with passenger growth of almost 35% compared with last year. Björn Óli Hauksson, CEO of Isavia, told Marta Dimitrova about the airport’s efforts in maintaining a high level of services, fulfilling its Master Plan to 2040, and its infrastructure and environmental projects.

his year’s ACI EUROPE Best Airport Award in the ‘Under 5 Million Passengers’ category went to Keflavik Airport, which was recognised for its efforts in maintaining a high level of services in times of rapid growth, its infrastructure and environmental projects, and its focus on the community. “We are very proud of the award and believe that this is the result of the emphasis we put on an ongoing improvement of services to our passengers and other users of the airport,” enthuses Björn Óli Hauksson, CEO of Isavia.

Keflavik Airport is, indeed, experiencing a rapid increase in traffic, with passenger growth from January to August 2016 of almost 35% year-on-year. “We are looking at planned seat capacity during winter schedule 2016-2017 being increased by 58% compared to the last winter schedule,” Hauksson notes. “If our forecasts come true, the number of passengers in 2016 will have increased by over 260% since 2009. I think we can say we are experiencing quite a growth!”

Master Plan to 2040

Last year, Keflavik Airport presented its Master Plan to 2040 and as Hauksson describes, it is the airport’s “main road map and is very ambitious”. The development happens in three ways. The airport is working on an overhaul of the airfield, where it is resurfacing both main runways, constructing rapid exit taxiways and adding 10 new air bridges. Preparations for further expansion in 2018 are also underway. “We are working on better distributing the traffic, both over the year and between peak hours. We have seasonal incentives for airlines with departures during daily off-peak times,” Hauksson explains.

In order to successfully manage passenger traffic, Keflavik Airport has implemented proven technology to ease the passenger flow. The number of self check-in kiosks is growing fast, as is the use of self-bag drop, automated boarding gates, and automation in security. In 2017, the airport will introduce further automatic border control gates and self-boarding gates. Other facilities such as unlimited free WiFi, touch-free lavatories, water fountains, and visible passenger service agents around the terminal, are also of high importance to the passenger and increase the positive experience in the terminal.

Aiming at maintaining a high level of passenger satisfaction at times of very rapid growth is a key priority. “Our values at Keflavik Airport are service, security and cooperation,” says Hauksson.

With Iceland being one of the greenest countries in the world, it comes as no surprise that Keflavik Airport is accredited at Level 1 Mapping of ACI’s Airport Carbon Accreditation. Environmental analysis has been conducted showing the key factors with the most environmental impact. The first steps of the action plan focus on waste management, fuel consumption, water and electricity consumption, and air pollution. In addition, as part of its environmental efforts, Isavia is currently participating in the ‘Green Steps’ project, managed by Iceland’s Ministry for the Environment and Natural Resources. The project focuses on the positive impact on the environment, improving the working environment of employees and reducing operating costs by decreasing consumption of resources. “One of the main goals of ‘Green Steps’ and Isavia’s environmental policy is to promote environmental awareness among employees and customers, and encourage progressive and eco-friendly solutions,” Hauksson comments.

The ACI EUROPE Best Airport Award has had a tremendous impact in marketing the airport for airlines and passengers. “We are determined to uphold the same quality standard. This will be a challenge along with the rapid future development, expansion and traffic growth. We have no specific plans to retain the award, other than to continue to give the best possible service to our customers and develop the airport with a focus on the environment and the community that we are a part of,” Hauksson concludes.
Ready for the World!

www.airportpristina.com
Limak Kosovo Airport “moving ahead” in the aviation business

Limak Kosovo Airport predicts 1.8 million passengers in 2016 following an ongoing trend of significant traffic growth. Haldun Firat Köktürk, Board Member & CEO, explains to Marta Dimitrova that the airport is “moving ahead” in the aviation business with its infrastructure developments, successful routes strategy, and dedicated community involvement.

The airport’s route development strategy has two main focuses. “The first way we are working on is to have additional air services to destinations which are not served to desired levels to meet demand in the respective catchment areas,” Köktürk adds. “By this we will have an increase in flights to existing destinations and more travel options for our passengers.”

Secondly, the airport is focusing on opening new services to destinations not directly served from Pristina. “Both strategies are having a positive impact in covering more of the countries and catchment areas where our diaspora is located, and will generate additional passengers visiting Kosovo either for leisure or business.”

Next on Kosovo’s long list of targeted destinations are New York, Helsinki, Dortmund, Memmingen, Milan, Amsterdam, Rome, and Malmö.

€30m airside investment
Limak Kosovo is planning to extend its current 2,560m runway to 3,000m. Due to the airport’s location and the foggy weather in winter, it often experiences visibility problems which results in the diversion of many flights. “Furthermore, we need to invest in the ILS (instrument...
Haldun Firat Köktürk, Board Member & CEO, Limak Kosovo International Airport JSC: “We have achieved significant double-digit growth in passenger numbers. We are willing to increase flight numbers and extend our network with additional routes, and we are using our incentive plan to attract airlines in order to catch this growth at a sustainable level. We are expecting a very successful next year, especially if visa liberalisation happens in Kosovo.”

The runway currently in use at Prishtina International Airport is 2,560m long and the airport is planning to extend it up to 3,000m. The total investment is estimated to be around €30 million, including extension of the runway and taxiways, and the purchase of new equipment.

“landing system) and replace some of the equipment with the newest technology,” Köktürk says. “The total investment is estimated to be around €30 million, including extension of the runway and taxiways, and purchase of new equipment.”

In addition, Limak Kosovo has made significant improvements within the company. “One of the most important goals was to develop our human resources and we have managed to achieve this by training and constantly refreshing the staff, thus creating a dynamic environment of work and increasing efficiency,” Köktürk notes. “As a result, we have received numerous appreciation letters from airlines for our performance and also many awards from different international institutions. Our services have been improved and we have also been certified by ISO, which shows our dedication to providing better services for passengers.”

The airport is also addressing one of Kosovo’s main social issues – unemployment. The Limak Airport Services Institute started two years ago and every year 30 students are selected from different faculties of the University of Prishtina. Currently, 45 students from the first and second cohort are working at the airport in different departments. “We are addressing the unemployment issue of Kosovo and it’s a good model to train our own employees and plan the HR. We have achieved several goals and now we have a very young and dynamic team from this source,” Köktürk adds.

Over the past year, the airport has received 15 awards, mainly for its corporate social responsibility and sustainability. It has also received several awards for the environmental studies carried out around the airport. For instance, its established modern water supply system is also used to supply potable water to several villages around the airport since they have a lack of water supply from the municipality level. In addition to this, the airport has been granted several CSR awards – predominantly through the Limak Airport Services Institute – for its employment contribution, and for providing education to the younger generation, such as the IPRA Golden World Awards, Stevie Awards, Hermes Creative Awards, and Golden Apple Awards for environmental contributions. “It is important for us to be awarded for our environmental studies because we have mostly focused on two issues – sustainability and HR planning,” Köktürk says. “It’s good to know that we have been recognised as a successful company to address these issues.”

Prishtina International Airport is accredited at Level 1 Mapping of ACI’s Airport Carbon Accreditation and, looking ahead, Köktürk emphasises that it is crucially important for the airport to upgrade to Level 2 Reduction. The airport is also looking forward to starting the third generation Limak Airport Services Institute project.

“We have achieved significant double-digit growth in passenger numbers. We are willing to increase flight numbers and extend our network with additional routes, and we are using our incentive plan to attract airlines in order to catch this growth at a sustainable level. We are expecting a very successful next year, especially if visa liberalisation happens in Kosovo,” Köktürk concludes.
Over the last two decades, sustained and rapid traffic development has led Cluj “Avram Iancu” International Airport to its current position as Romania’s biggest regional airport. The gateway to Transylvania has grown from 32,000 passengers in 1996 to almost two million in 2016, with its location just 10km from Cluj-Napoca city centre (Romania’s second-biggest business centre) combined with a strategy of infrastructure and route development, key to that progression.

2016 will see a record 1.8 million passengers handled (+21% year-on-year) driven by a doubling of the number of airlines operating at Cluj from four to eight, and 50% growth in the route network from 25 to 37 destinations.

David Ciceo has been Managing Director of Cluj “Avram Iancu” International Airport throughout the 20 years of sustained development, and has been its real driving force. In conversation with Airport Business, his passion for the success of the airport and the whole region shines through. “This journey as Managing Director of Cluj International Airport always seemed to bring an equivalent number of rewards and new challenges in our activity,” he says. “For example, an important step in this journey happened in September 1996, when we obtained the government decision which granted Cluj International Airport the right to start international flight operations. As a result, we had the opportunity to open international traffic, but the main challenge of this reward was how to enable airlines to reach the Cluj Airport catchment area by delivering them the strategic infrastructure required by international aviation regulations.”

In 2004, when the airport’s throughput was just 160,000, it envisaged a significant traffic increase resulting from Romania’s EU accession in 2007. Its studies showed demand for infrastructure to handle one million passengers by 2015. In reality, that figure was reached five years earlier, in 2010, but its foresight in developing its infrastructure meant it was ready and avoided a capacity crunch.

“Being Managing Director of a small airport in 1996 was a great motivation for me to try and turn the odds for Cluj International Airport and transform it into one of the most dynamic airports in Europe,” Ciceo enthuses. “The main challenges of this rapid development were the need for infrastructure modernisation projects that would improve the quality of services offered to both airlines and passengers, and the difficulties in attracting more and more travellers from an extended catchment area.”

The first phase of the new runway project was completed in 2013, and its extension from 2,100m to 3,500m is one of the most important infrastructure developments for the coming years. There are also plans to expand both the security control and boarding gate areas.
“Connectivity changing future of entire region”

The airport generates significant economic benefits for the entire Transylvania region, through 3,000 direct and indirect jobs, and also its connectivity, which contributes to increased tourism, trade, investment and productivity. “Thus, a coherent strategy designed together with local authorities can change, not only the future of the airport, but also the future of the entire region,” Ciceo notes.

Indeed, Cluj International Airport is a publicly-owned airport, with Cluj County Council the main shareholder.

“Cluj-Napoca’s position as the second business hub of the country would not be possible without the high degree of air connectivity provided by Cluj International Airport,” Ciceo comments. “The available infrastructure of a region is a contributing factor in convincing large companies to invest. The air service provided by Cluj International Airport supplies exports around the world and enables employees to travel to clients, regional offices and global headquarters.”

Connectivity has been further enhanced this year, with eight airlines (AtlasGlobal, Blue Air, LOT Polish Airlines, Lufthansa, TAROM, Turkish Airlines, Vueling, and Wizz Air) now operating regular services across Europe and to the Middle East.

Wizz Air is Cluj’s biggest carrier, and about 75% of traffic is currently operated by low-cost carriers. Full-service carriers Lufthansa and TAROM have increased frequencies this year, while Turkish Airlines and LOT Polish Airlines are new arrivals at the airport.

“For 2016-2017 the route network will offer 41 scheduled destinations and more than 10 tourist flights during the summer season,” Ciceo explains. “The strength of the catchment area is a key factor in the successful development of our route network, given the 17 new regular destinations announced since the start of 2016.”

“Taking advantage of emerging devices and technologies”

As “one of the most dynamic airports in Europe”, Cluj is also embracing digital innovation. It is active on social media through Facebook, Twitter and Pinterest, while its website and smartphone app provide relevant information to travellers.

“Given today’s environment of instant information, we always have new strategies to take advantage of emerging devices and technologies,” Ciceo says. “Besides the daily posting on social media channels, Cluj International Airport gives real-time feedback to passengers’ questions on these digital platforms.”

“This is all part of the airport’s progressive approach to offering a diverse range of services to travellers. It is a strategy that has stimulated two decades of exponential growth, and 2016 is set to deliver another record traffic result.

“Cluj International Airport is already established as the second airport of Romania, after Bucharest-Otopeni, and in the future we propose to finalise the runway extension project, develop an intermodal transport project with the inclusion of a cargo terminal, and further develop our route network,” Ciceo concludes.

Cluj “Avram Iancu” International Airport factbox

2015: 1.5 million passengers

2015 PASSENGER TRAFFIC GROWTH: 26%

2016 ESTIMATED PASSENGER TRAFFIC GROWTH: 21%

KEY AIRLINE CUSTOMERS: Wizz Air, Blue Air, TAROM, Lufthansa

NUMBER OF ROUTES: 37

TOP 3 DESTINATIONS: Bucharest, Munich, London
Frankfurt Airport is one of the busiest international hubs in Europe and by far the busiest in Germany with over 60 million passengers travelling through the airport per day. With over 300 retail outlets it is also one of the biggest shopping malls in Germany.

But for those who don’t have enough time to stroll through the elegant lanes of Frankfurt Airport’s “Shopping Boulevard”, AOE, a leading provider for Open Source commerce solutions, has come up with a way to transform Frankfurt Airport into an all-encompassing omnichannel e-commerce marketplace, following a tough year in which the travel retail volume in Europe has dropped by 7.7% in just one year.

“The solution (we call it the OM3 Suite) that we have started rolling out at Frankfurt Airport as the first airport to become a full omnichannel commerce marketplace, reverses this revenue bleed by seamlessly integrating the online and offline world and providing intuitive, convenient and extremely fast shopping for travellers, no matter where they are in their journey (sitting in the lounge, standing in the security line or planning their shopping from their coach at home),” explains Kian Gould, CEO/Founder, AOE.

But the solution is much more than just a digital version of the retail world. Through the platform airports are finally able to get to know their passengers, and can now use its loyalty programme, detailed knowledge on shopping interests and flight information to really provide customer-centric solutions both on- and offline.

AOE brings optimism in times when the travel retail industry is facing difficulties. All around the world revenue growth has slowed down significantly from its double-digit growth figures to negative growth in most mature e-commerce regions. “Our solution provides airports with everything they need to become a full omnichannel e-commerce marketplace for all their retailers and stop this bleed before, “enthuses Gould.

AOE offers one-of-a-kind omnichannel experience

AOE, a leading Open Source solutions provider, has just launched a highly innovative omnichannel digital platform to transform Frankfurt Airport into the most comprehensive e-commerce marketplace in the travel industry. Kian Gould, CEO/Founder, AOE, talks to Marta Dimitrova about the benefits of this “seamless, convenient, and extremely fast shopping for travellers”.

“Best Omnichannel Experience”
AOE and Fraport’s exceptional achievement is not left unrecognised and this spring Frankfurt Airport was awarded the Imagine 2016 “Best Omnichannel Experience” award in Las Vegas for its one-of-a-kind omnichannel solution. “Winning this award and also giving the keynote at one of the biggest e-commerce events in the world was an incredible experience. The main reason why we won this award, was that no one had ever attempted anything this complex before,” enthuses Gould.

The OM3 solution is already available at Frankfurt Airport, however, AOE has undoubtedly created a versatile product offering that can be utilised by any major travel hub. “We are currently in very concrete discussions with three airports already and half a dozen have shown first interest. Each airport has unique challenges, so it’s not a one-size-fits-all approach, rather it’s a suite of software and services that we tailor to each airport’s exact needs.”

One of AOE’s biggest initiatives for OM3 is the full integration of off-airport retailers without airport concession and seamless on-airport logistics for integrating those retailers. Another major initiative is the airport-wide usage of data that the airports can collect thanks to the OM3 solution. AOE allows airports to target their customers directly and personally with all the information collected through loyalty programmes, App purchases, web purchases, etc.

Looking ahead, Gould concludes: “This area still has huge potential and will drive revenue like nothing else, because let’s be honest, duty free prices are no longer cost-saving for the consumer. It’s all about being there for the consumer, at that one moment in time, where it is the most convenient for them.”
Frankfurt Airport faced the challenge to transform the airport retail business into the digital age. The result is a completely new and unique omnichannel solution, which combines complex on- and offline services. It offers our customers an optimal travel experience, whether they want to shop, get informed or use one of our numerous services.

Kai Schmidhuber
Senior Vice President Multichannel Fraport
Aéroports de Montréal focused on “continuous improvement of the passenger experience”

Montréal-Trudeau is truly a destination in itself – “functional and vibrant, as well as emblematic of Montréal.” On its 75th anniversary, James Cherry, President and CEO, Aéroports de Montréal, outlines the operator’s main goals to enhance the passenger experience and to be an efficient transportation hub, to Marta Dimitrova.

Aéroports de Montréal’s (ADM) master plan vision is clear – to increase the capacity of the international sector and enhance the customer experience. The plan also aims to create a facility "both functional and vibrant, as well as emblematic of Montréal," explains James Cherry, President and CEO, Aéroports de Montréal.

Located just 20 minutes from the heart of Canada’s second largest city, Montréal-Trudeau has emerged as a growing transportation hub and major European gateway for North America, last year welcoming 15.5 million passengers.

In May 2016, ADM inaugurated $350 million (€313m) worth of expansion and improvements at Montréal-Trudeau, which have significantly increased the capacity of its international services and enhanced the customer experience.

The new, highly innovative facilities include an extension to the international jetty, which offers six new boarding gates to handle more wide-body Airbus A380 and Boeing 787 aircraft, as well as the equivalent of two additional gates accessible by shuttle. Six super jumbo jets can now park at the same time around the new building, and the additional remote parking significantly improves airport capacity during peak periods, alleviating congestion and allowing for most of the aircraft to be brought closer to the terminal. This offers significantly more convenience for passengers and increases overall fluidity and turnaround time.
Destination Montréal-Trudeau

The project, financed entirely by ADM without any public funding, “has been completely showing imagination and taking into account our limited financial resources,” Cherry comments.

The main innovation, however, is the development of an interior area designed to create a unique atmosphere through the integration of artistic and cultural elements, including a lighted ceiling installation, called Nuée de verre (Veil of Glass) composed of different-coloured glass triangles illuminated by spotlights. “Although representing a small percentage of the budget, it is these little extras, in conjunction with the open plan, transparent architectural design, that makes all the difference,” Cherry notes.

Moreover, the expansion has added a distinctive range of new commercial offerings to enhance the travel experience, including restaurants and boutiques, VIP lounges, and an innovative rest area called ‘Room to Read’, as well as a children’s playground. Visitors can enjoy well-known local brands and experience the variety of restaurants, which make the airport truly stand out and become a destination itself. In total, some 800sqm of new retail space was added and by the end of 2016 Montréal-Trudeau’s retail floor space will total 14,585sqm, which will mark an increase of approximately 38% compared with five years ago.

The new international jetty was also built in keeping with ADM’s sustainable development philosophy by using green building materials, energy saving ventilation and heating systems, LED lighting, and devices to reduce water consumption. ADM is currently in the process of applying for LEED certification for the building.

“Our goal was to infuse the airport facilities with a typically Montréal character, while creating an atmosphere that is both pleasant and festive, even playful,” Cherry states. “The result we call the ‘Aérogalerie’, which aims to infuse the terminal spaces with a typically Montréal character, while supporting local artists and cultural industries.”

“We are also at the forefront when it comes to mobile technologies,” Cherry adds. ADM has ensured that Montréal-Trudeau is a pioneer in shared facilities, such as self-service check-in, self-tagging baggage, self-service baggage drop-off, automated flow tracking of passengers and baggage, and automated border control (ABC). “All of these technologies and approaches are playing an integral role in our goal of ensuring a seamless, smooth and smart journey for airport passengers, every step of the way,” Cherry enthuses.

Since 2004, Montréal-Trudeau has steadily expanded and enhanced its technology offerings, including the introduction of free WiFi; real-time SMS alert; online reservations to ‘SecurXpress’, a new service allowing passengers to book a predetermined time for security clearance; as well as the airport’s mobile application YUL, designed to serve as a personal assistant for Montréal-Trudeau users. ADM adapts to passengers’ needs, allowing more options, personalisation and customisation, to put passengers in control of their journeys.

Meanwhile, the airport set a new record with 3.9 million passengers in Q1 2016, and by the end of this year is expected to welcome approximately 16 million passengers. “Traffic at Montréal-Trudeau has been growing almost continuously since 2004,” says Cherry. “Part of the reason is our strategy to make the airport a dynamic hub linking North America and Europe, especially French-speaking countries. Connecting traffic through the airport has shown dramatic growth.”

Furthermore, over the past decade, the number of international destinations served by direct flights from the airport has more than doubled from 30 to 80. With its growing role as a regional hub, Montréal-Trudeau has also been experiencing a sharp increase in connecting passenger traffic: international-to-international traffic has been growing by 8-10% a year, and international to the US and vice-versa by over 20%. About 20% of total passengers are now connecting to other flights and destinations, which is much higher than it’s ever been.

In terms of route development strategy, the airport’s route network continues to grow, and since September last year the airport has added seven cities to its list of destinations, including Beijing, Reykjavik, Denver, Tunis, and Glasgow. “These are results delivered through an effective ASD (air service development) strategy,” Cherry comments. “There is still work to be accomplished, and attracting additional services from Asia remains a cornerstone of ADM’s strategy. We are clearly underserved in our connectivity to East Asia, such as to Hong Kong and Japan. We also see increased demand for more direct traffic to the Middle East and Africa, and a new service to South America.”

The new jetty, moreover, will certainly help ADM achieve its goal of strengthening Montréal-Trudeau’s role as an efficient transportation hub between North America and Europe. With 30 airlines offering direct flights to more than 135 destinations worldwide, it already ranks second among Canadian airports for the number of direct destinations and first in terms of the ratio for international passenger traffic. Over the past 18 months, ADM has welcomed four new airlines – Air China, Icelandair, WOW air, and Tunisair – while the established carriers Air Canada, Lufthansa, and Air Transat added capacity from Montréal on their respective routes to Geneva, Munich, Paris and Lyon. This summer, Air Canada launched new long-haul services to Denver, Houston, and Philadelphia.

As Montréal-Trudeau celebrates its 75th anniversary this year, the airport’s vision is to be a solid, evolving, state-of-the-art and performing airport, and an efficient transportation hub. “We are constantly exploring new avenues to improve Montréal-Trudeau’s airport facilities and services in response to the evolving needs of the travelling public. Our goal is to provide airlines and their customers with a level of service that is beyond compare,” concludes Cherry.
Airports are attractive assets that provide a stable return. That is why privatisation and airport investments increasingly attract interest among investors. “The manner in which the sector has managed various crises in the last few years has shown that airports are a robust and attractive asset class,” says Holger Linkweiler, Managing Director, AviAlliance.

AviAlliance, one of the world’s leading industrial airport investors and managers, was founded in 1997 under the name of HOCHTIEF AirPort and has systematically built up a complementary, balanced portfolio of airport holdings. It currently holds stakes in Athens, Budapest, Düsseldorf, and Hamburg airports. “In the first half of 2016, our four airports performed very well,” comments Gerhard Schroeder, Managing Director, AviAlliance. “The number of passengers going through Athens, Budapest, Düsseldorf, and Hamburg airports totalled 31.9 million – a 5.5% increase compared with the first six months of the prior year.”

AviAlliance focuses on airports with stable frameworks and the potential for long-term growth, which perfectly describes the four airports the company has invested in. For instance, Athens International Airport, which in March celebrated its 15th anniversary. “Athens International Airport is a nucleus of economic development, upgraded tourism services and job creation in the country. Despite the economic crisis in Greece, Athens International Airport has grown passenger numbers from 12.9 million to 18.1 million in the past four years,” Linkweiler explains. “And the airport is not just successful in business terms, it is also aware of its social responsibility. Recently, for example, it re-triggered the Youth Employment Programme which it had initiated in 2014. This offers 100 young people the opportunity to do paid work at the airport for a period up to six months, providing them with the necessary working experience and on-the-job training to support their future professional steps.”

Other projects that show AviAlliance’s determination to boost growth in its airports include Budapest Airport’s ‘bud:2020’ development programme. The airport is going to invest €160 million over the next five years. One of the most important elements of the programme is the new Pier B. Budapest Airport has also been commended on a number of occasions for the quality of its services. In 2016, for the third time in succession, it has been honoured as the best airport in the Eastern European region by receiving the Skytrax World Airport Award.

Düsseldorf Airport, meanwhile, has submitted an application to extend its capacity in order to be able to operate in a more demand-oriented way. The airport is located in one of the strongest economic regions in Europe, with 18 million people living within a 100km radius. AviAlliance considers it essential for Düsseldorf Airport to be granted scope for growth to ensure that it can keep pace with international developments and fully meet the mobility requirements of people and businesses.

Hamburg Airport is also making itself fit for the future and will invest €120 million in infrastructure modernisation in the period to 2020.

Key investment criteria

Airports that have not yet reached their full potential and could offer substantial scope for development are AviAlliance’s main target. Its investment criteria are clear: Good growth potential, an attractive catchment area, scope for infrastructure and space optimisation, potential for non-aviation business, and the possibility for improvements to operational and business performance. AviAlliance is a hands-on investor, supporting the local management with operational and financing know-how. It is primarily interested in long-term engagements and brings an integrated approach, bundling aviation, non-aviation business, master planning and financing expertise. AviAlliance is a wholly-owned subsidiary of PSP Investments, one of the largest Canadian pension funds, which has an extremely strong financial foundation.

Looking ahead, AviAlliance is confident about new acquisitions and future projects. “We keep a close eye on the market and are in a position to take advantage of any favourable opportunities that arise,” says Linkweiler. “We continuously review projects and potentials. And if we find the right opportunity, we act. With regard to new acquisitions, we feel confident,” Schroeder adds. “There are currently several interesting projects. But an acquisition is just the beginning. It has to be followed by the long-term process of developing the project into an enterprise that is successful in terms of its business and its operational performance – for the benefit of its owners and of all the stakeholders.”

AviAlliance investment focused on airports with long-term growth potential and stable frameworks

AviAlliance is one of the world’s leading industrial airport investors and managers. It has built a complementary, balanced portfolio of airport holdings, including Athens, Budapest, Düsseldorf, and Hamburg. AviAlliance’s Managing Directors Holger Linkweiler and Gerhard Schroeder outlined the company’s main goals and key investment criteria to Marta Dimitrova.
Zurich Airport and the greenEMAS

By Philipp Althaus

Zurich Airport at the western end of Runway 28; it’s close to midnight in June 2016 and the airport operation has just stopped. All of a sudden construction machines appear and are being placed along the RESA. Within 5 minutes, the construction site of the FAA-approved greenEMAS® is crowded by a skilled group of construction workers starting their night-shift. Within 6.5 hours per night, they complete several stages of the greenEMAS® project. With a length of 163.3 m and a width of 66 m, this is the greatest greenEMAS® that has ever been built in the world. Runway Safe Sweden AB holds the patent and the IP rights of this system and realises it in a joint venture with KIBAG Airfield Construction AG. The two companies – combining Swedish innovation with Swiss precision – will complete the installation within 23 nights at Zurich Airport. Thanks to this project plan, there’s no necessity neither for runway closure nor reduction of air traffic.

This project is the result of the first European public invitation to tender for an EMAS and Runway Safe Sweden AB won it with KIBAG Airfield Construction AG in June 2015. Thereafter, the system was adapted to the local conditions and the fleet mix of the airport in Zurich and is capable of smoothly bringing an overrunning aircraft to a halt without causing serious damage.

Generally speaking, the greenEMAS® consists of four components: it’s based on a pavement that supports the given fleet mix. On this pavement, the core material foam glass is filled. This foamed silica is the most innovative part of this system since it’s made from recycled glass and crushes under the load of a landing gear. It is easily storable and transportable. The foam glass is covered by a CLSM Slab, which will be protected by a MMA Polymer Topcoat in order to make the system more resistant. This greenEMAS® is a sustainable solution, which produces low maintenance and lifecycle costs.

Maybe the greatest reference project of this system is the installation at Midway International Airport in Chicago, where the third greenEMAS® is being built. But as every airport is different, the design of the RESA at the Zurich Airport presented a specific challenge to the engineers of both companies as the setback from the Runway 28 only measures 2 m and aircraft can take-off in both directions.
Recognising progressive ideas in action transforming airport performance and reputations

\textbf{'Innovation Space' wins Frankfurt Airport Innovation Challenge}

Fraport has announced the winner of the first Frankfurt Airport Innovation Challenge – a competition that was open to members of the public across the world. The Innovation Challenge was launched to find pioneering ideas that have the potential to make the passenger experience at Frankfurt Airport even more unique.

The six best ideas were selected by a five-member jury, which was made up of industry and innovation experts. The diverse selection of entries included the use of augmented reality technology on Frankfurt Airport’s Visitors’ Terrace and baggage carts that use Bluetooth technology to follow passengers. However, the winning entry was the ‘Innovation Space’ – a dedicated room where passengers can meet up at the airport to share and develop creative ideas together.

The Innovation Space is intended to help create added value through personal interaction at the airport, and can bring together the airport operator, local start-ups and passengers to tackle various issues.

“This idea promotes Frankfurt Airport and the entire region as a place for innovation,” said Claudia Uhe, Head of Fraport AG’s Corporate Development, Environment & Sustainability Unit and chairwoman of the jury. “The idea provides an excellent platform for direct customer feedback and the opportunity to exploit the great potential of creative minds from around the globe who come together here at the airport and in the region.”

The six best ideas will now be examined further to explore their practicality, with a view to implementing them at Frankfurt Airport.

\textbf{Heathrow aims to become world’s first dementia friendly airport}

Heathrow Airport is working with the Alzheimer’s Society to change global attitudes towards dementia as part of the charity’s Dementia Friendly Communities programme.

All 76,000 staff at the airport will be made more aware of the illness through various classes and online resources. As part of the programme, Heathrow Airport has been working with OmniServ on several initiatives. Staff will undergo training based on the Alzheimer’s Society courses and the full frontline Special Assistance team will be trained as ‘Dementia Friends’. Also, STAAR (Senior Trained Additional Assistance Role) teams have been created, to help better serve passengers with hidden disabilities. In addition, help will be provided for passengers with anxiety, with quiet lounges provided in the terminals.

John Holland-Kaye, Chief Executive, Heathrow Airport, said: “Our vision is to give passengers the best airport service in the world. Airports can be particularly stressful for passengers with dementia so we are delighted to be working with the Department of Health and Alzheimer’s Society to make sure that they get the support they need. We have started training our colleagues and making improvements so that we can be the world’s first dementia friendly airport.”

\textbf{Innovation Showcase}

In response to ever-evolving passenger demands, airports across Europe are taking inventive approaches to simplifying and differentiating passenger experiences. Ryan Ghee explores some of the latest innovations.
ATH Messenger bot provides flight updates and retail offers

Athens International Airport has developed a bespoke Facebook Messenger bot, which passengers can use to access travel related information in real-time.

Bots, or chatbots, enable companies to offer automated but natural conversation with their customers, and an increasing number of airports and airlines are starting to exploit their customer service capabilities. Using the new ATH Messenger bot, passengers flying from Athens can request flight updates and airport retail offers, which are delivered in real-time. Ancillary services, including airport parking, can also be booked.

George Demetriades, Director of Information Systems and Telecommunications Business Unit, Athens International Airport, explained: “The bots are programmes that perform a specific task in an automated manner where human intervention is not necessary. "It is an application that will revolutionise the way we use our smartphones because the more it evolves, the more it reduces the use of many different applications, as with a simple command we will be able to perform everything we want via the Facebook Messenger."

Recognising progressive ideas in action transforming airport performance and reputations

INNOVATION SHOWCASE

Munich Airport digital tours help passengers prepare for travel experience

Travellers flying from Munich Airport can familiarise themselves with the airport ahead of their journey using a new online virtual tour tool, which has been created using 360° imaging technology.

A team with a high-tech mobile camera spent months covering every area of the airport, with the exception of the security checkpoints, recording digitised images of approximately 300,000sqm of space in the Munich Airport Center, the two terminals and the Terminal 2 satellite facility.

The result is an online feature that offers passengers a detailed walkthrough of the airport, with more than 1,000 points of interest embedded in the interactive maps. More than one million panoramic photos were processed to produce the digital tour.

The digital maps can be found at: https://navigation.munich-airport.de/
New $2bn Ashgabat Airport “a bridge between Europe & Asia”

The Turkman President, Gurbanguly Berdimuhamedov, opened the new Ashgabat International Airport Complex on 17 September. The US$2.25 billion (€2bn) development was built by Turkish company Polimeks, which is a major player in the Turkmenistan construction market with projects totalling US$10 billion (€9bn). The development means Ashgabat International Airport has capacity for 14 million passengers per year, while new cargo infrastructure means it is ready to be the key logistics centre for the region. Construction also included a very long new CAT III ILS-equipped 3,840m runway, which is capable of handling A380 and 747-8 aircraft.

The new “smart building” is a striking falcon-shaped 166,000sqm facility, representing one of the national symbols of Turkmenistan. (The World Record Academy has already registered it in the “Largest Bird-Shaped Building” category.) A simple, coherent layout provides passengers with well-defined routes from landside to airside, while a linear arrangement between blocks minimises level changes and walking distances, creating a functional state-of-the-art passenger terminal. This functionality is critical bearing in mind Ashgabat International Airport’s successful development of a European-Asian transfer market (see box).

The new Ashgabat International Airport Complex, constructed by Polimeks, opened on 17 September. The design of the new complex was inspired by the falcon – one of the national symbols of Turkmenistan.

How successful is Turkmenistan Airlines’ Euro-Asian “bridge”? 

The new Ashgabat International Airport Complex was officially opened by the President of Turkmenistan, Gurbanguly Berdimuhamedov, on 17 September when he asserted: “We have all the opportunities to become a transport bridge facilitating economic cooperation between Europe, the Asia-Pacific region and South Asia.”

Indeed, Ashgabat is geographically well-located as a bridging point between Asia and Europe, as an alternative to the Middle Eastern hubs of Abu Dhabi, Doha and Dubai, and Ashgabat’s home carrier Turkmenistan Airlines has, in recent years, demonstrated a reasonable level of connectivity success.

A recent anna.aero analysis of the carrier’s transfer traffic revealed that the number one connection link for the airline was between the airports of Bangkok Suvarnabhumi and Moscow Domodedovo, with nearly 8,500 passengers (two-way) using Turkmenistan Airlines as their carrier of choice between the two points, which currently have no direct connection (significantly this connecting service performs well in competition with Aeroflot which has a direct service between the Thai capital and Moscow Sheremetyevo Airport). Indian cities figure highly as end-destinations, with Amritsar being the most popular onward connection point from Ashgabat, placing it in five of the top 12 connections made. This may change in the future with anna.aero indicating that Delhi has also seen a 23% increase in seat capacity. The airline also feeds its Asian destinations with routes to Frankfurt, St. Petersburg, Paris CDG, Almaty and Minsk. Turkmenistan Airlines operates an all-Boeing fleet – 47 777/737s, four 757s, and three 777s – with an average age of 10.5 years.
Digitalisation and urbanisation are triggering a change in individual mobility. This represents a great opportunity to further increase efficiency in car park management, and ultimately in convenience for car parkers. In only a few years from now, we will live in a different world where hybrid and electric cars will rule the roads. Sooner or later, many of these cars will be self-driving cars, which is one of the key reasons for parking facility operators to develop strategies to address digitalisation.

“One thing is certain, the parking industry will look very different in the not too distant future,” says Philippe Op de Beeck, CEO APCOA Parking. “Consequently, every player involved in this process is urged to rethink its business models, in order to provide the most convenient and desirable products and services to its current and future B2B and B2C consumers.”

APCOA Parking is embracing innovation across its portfolio of more than 1.4 million parking spaces, with parking facilities at over 30 airports. A successful offer in the future will need to represent an integrated and comprehensive solution, covering all aspects of the consumer journey – from e-booking platforms to navigation tools, park space finder, electric charging infrastructure, and e-payment options. Op de Beeck explains that such an integrated solution will come in the form of a smartphone app. “These services will be completely integrated into the smartphone, but also in the car. As a consequence, parking as a service will become a higher-quality and more consumer-oriented product. Digitalisation will shift the power from the car park owner to the consumer.”

It is clear that digitalisation is going to have a significant impact on the parking industry, and Big Data is set to play an increasingly central role in these developments. “There are technical systems that use Big Data to generate forecasts of parking facility occupancy patterns,” Op de Beeck comments. “This will dramatically reduce the number of drivers circling looking for parking spaces.”

Electric vehicle charging is becoming increasingly important in all European markets – the most advanced being Norway. Other European markets are picking up speed as well. In only a few years from now, we will live in a different world where hybrid and electric cars will rule the roads. Sooner or later, many of these cars will be self-driving cars, which is one of the key reasons for parking facility operators to develop strategies to address digitalisation.

Philippe Op de Beeck, CEO APCOA Parking: “The consumer is looking for more and more convenience in help with finding a space, pre-booking, navigation, battery charging, payment, flexible times, and contactless parking. This may come from an app or be completely built into a car.”

Among the parking innovations already implemented at other locations, which could be implemented at airports, are automatic license plate recognition for barrier-free parking, and customer loyalty cards.

“Digitalisation will shift power from car park owner to consumer”

Philippe Op de Beeck, CEO APCOA Parking, interviewed by Ross Falconer.
Behold, Athens – the last greenfield project to replace an existing major European airport, which began operations on 29 March 2001, over 15 years ago. The story of its construction and approach to airport operations provides lessons for many.

With the existing airport of the time overwhelmed by capacity issues, the project of a new airport for Athens had been on the cards for some time, but the failure of the government’s initial bid to host the centenary of the Olympic Games of 1996 gave everyone pause for thought. It was a shock that made them realise that the capital city of Greece needed better infrastructure, including a new airport (in 1998, when the project was already underway, Athens was subsequently selected to host the 2004 Olympics).

What followed was a surprising innovation. The new airport company, Athens International Airport, became a pioneer of international Public-Private Partnership (PPP), being the first major greenfield airport with the participation of the private sector. The cost for the development of the airport was financed mainly from bank loans – with European Investment Bank being the major lender, while the remaining funding was provided through private shareholders equity and grants. Today, ownership continues to be divided between the Hellenic Republic (Greek State) and Private Sector in a 55%-45% stake, although the private shareholders have changed.

Quite aside from its ownership structure, Athens is actually emblematic of the business transformation of Europe’s airports in many other ways too. Its traffic growth and mix of airline customers are impressive – and in the context of the ROUTES events, Athens International Airport is the most awarded airport with 16 distinctions over 12 years. It was also the first airport in Europe to invest in a photovoltaic park, supplying it with some of its power – part of the fabric of its efforts to lower its carbon footprint (at present, it is Airport Carbon Accredited for Level 3, Optimisation).

But let’s take a step back, to its status as the last major airport project to completely renew the first impression visitors get of a country. Before that, Munich Airport held the distinction, moving to an entirely new airport site in 1992, preceded by many other such grand projects at airports in the 2 decades before that. But little of note has happened since.

Meanwhile, the airports operators in UAE and Qatar have opened extraordinary new facilities and between 2000 and 2020, China will have built and opened over 75 new airports. You could be forgiven for asking “has Europe’s airport capacity mojo gone East?”

Airport capacity – only a problem when you don’t have it

Over the past 25 years, a visible trend has emerged about airport capacity in Europe – there is not enough of it and building more of it is becoming an increasingly arduous process.

EUROCONTROL and its highly regarded ‘Challenges of Growth’ reports on airport capacity – issued every 4 years – continue to issue warnings, even drilling down to identifying capacity issues at national level in many cases. But it has become increasingly clear that airport capacity only becomes a genuine priority when governments recognise its impact on their economies.

As this article goes to print, the Conservative Government in the UK is on the cusp of making the decision that has been deferred time and again, over 4 decades: where to build a new runway in the South East of England. It’s been a long and bumpy road to get here, but perhaps now that the UK has decided to exit the EU, people will at least agree that an island economy lives or dies by its air connectivity.

Willie Walsh, the CEO of International Airlines Group (IAG) has hedged his bets beyond Heathrow and Gatwick, operating aircraft out of Dublin (currently applying to build a new runway) and Barcelona and Madrid where capacity is not a problem, thanks to the foresight of the Spanish airport operator, Aena.

And the next big visionary project is already underway. Three years ago, a new greenfield airport project emerged in Europe – IGA’s new airport for Istanbul, due to open at the end of 2017, with an eventual capacity of 150 million passengers a year.
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