Sheremetyevo’s focus on continued expansion & transfer potential

Interview: Mikhail Vasilenko, CEO
Sheremetyevo International Airport

Edge of Tomorrow
EUROCONTROL sounds alarm on airport capacity

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With people and businesses taking to the air as never before, this summer has been extremely busy for Europe’s airports. Many broke their own record in terms of passengers handled in a single day. That was notably the case for London-Heathrow (262,000 passengers on 29 July), Paris-CDG (248,466 passengers on 12 August), Amsterdam-Schiphol (233,000 passengers on 30 July), Dublin (115,800 passengers on 29 June), London-Stansted (101,500 passengers on 24 August), Brussels (96,000 passengers on 30 July), Budapest (54,000 passengers on 30 July) and so on...

While airports have for now been coping with the heat, our Air Traffic Management (ATM) system has not. According to EUROCONTROL, en-route delays have more than doubled in July-August, with the average delay per flight increasing by +192%. Overall, 20% of operated flights were delayed. The main causes were a lack of air traffic controllers & other staffing issues (61%), weather (30%) and strikes/other disruptive events (9%).

This situation has – understandably – put airlines on edge, as the costs of flight delays and cancellations have skyrocketed. But airports are also affected. Delayed flights compromise efficient airport operations, service quality and the passenger experience. Cancellations translate into direct revenue losses with foregone airport charges and commercial revenues. Even more worrying, several airlines have indicated that they will not develop air services in France for now due to the disruption costs caused by continuous ATC strikes in the country. That only means lost business & connectivity opportunities for French airports and their communities.

A lot of this comes down to the failure of the Single European Sky. The flagship EU project has not delivered the intended ATM reform and airspace defragmentation that were expected to boost capacity and reduce costs. While the European Commission is now looking to relaunch the project, I must say I find it difficult to be optimistic. EU States did not seize the opportunity of the Great Recession spurred by the 2008 financial crisis to reform the ATM system. What will make them move now? Will they be willing to challenge the status quo and push for disruptive change in the current political environment? One thing looks certain: engaging with and putting consumers at the forefront of this agenda (rather than the financial impact for airlines and airports) will be key to creating political leverage.

For ACI EUROPE, the underlying agenda is not just about promoting cooperation but also closer integration between airports and Air Navigation Service Providers (ANSPs). This is why our organisation has taken an active part in the deployment of SESAR, in particular through the work of our SESAR-Related Deployment Airport Grouping (SDAG). This is also why we have been pushing for the Ground Coordinator and Total Airport Management. These operational concepts go beyond A-CDM to link all stakeholders airside and landside – including local transport services to/from the airport. Beyond that, we need to review the format and governance of our relationship with ANSPs. What guides us in all this is – again – putting the passenger at the core of our operations.

But while renewed attention is now being paid to ATM capacity issues, one should not lose sight of the other side of the equation: airport capacity. ACI EUROPE applauds EUROCONTROL for its excellent Challenges of Growth report, which was released at our Annual Congress & General Assembly last June. As you can read in this issue, this report shows that the airport capacity crunch remains a significant challenge for Europe and its economy. To address this challenge, airports need their license to plan, invest and deliver the infrastructure needed to meet future demand.
Brussels Airport

Brussels Airport Company and Belgocontrol have signed a cooperation agreement with Brussels Airlines, TUI Fly and DHL Express, undertaking joint initiatives that further reduce the environmental impact of aviation activities. In signing the ‘Collaborative Environmental Management’ agreement, the five partners formalised their long-standing cooperation on environmental issues. By joining forces and aligning all their environmental efforts, the partners aim to accelerate projects and achieve more in the fields of carbon and noise reduction, as well as local air quality.

Athens Airport

Musician Sting was the guest of honour at Athens International Airport as the gateway unveiled a tapestry which supports Amnesty International’s ‘I welcome’ campaign for refugees across the globe. The monumental tapestry named ‘I love Greece’ was designed and offered as a gift to Amnesty International from the acclaimed Greek artist, Sophia Vari. Symbolising the Greek welcome offered to hundreds of thousands of men, women and children from Syria fleeing war and persecution, at a difficult point in time for Greece itself, the tapestry will be on permanent display in the Arrivals Hall.

Budapest Airport

The airport’s Pier B development has been completed, securing another milestone in the BUD 2020 programme. The new facility was much needed, as Budapest Airport has seen double-digit growth, often reaching 14%-15%, in passenger numbers continuously during the last four years, with an even greater increase in non-Schengen traffic. The new pier B was designed by a team of architects from Hungarian design bureau KÖZTI led by Zoltán Tima. As part of the self-financed plan, the airport operator spent 55-60 billion HUF (€160-180 million) of its own resources to improve airport infrastructure, modernise instrument landing systems, expand aircraft maintenance hangars, hand over new logistics bases in the vicinity of Terminal 1, and open the new airport hotel near Terminal 2.

Visby Airport

Swedavia’s operations at Visby Airport are now entirely fossil-free following many years of focused work, which included the electrification of its vehicles, a switch in fuels and implementation of efficiency measures. In 10 years, fossil carbon dioxide emissions at Visby Airport have decreased from about 300 metric tons a year to zero. Intensive work to replace all vehicles that run on fossil fuel energy – from fire trucks to snow removal equipment – accounts for the reduction. Energy consumption has fallen steadily, and the airport’s energy is provided by green or renewable electricity.
Munich Airport

During two weeks in August, to the delight of passengers and visitors, Munich Airport hosted the second edition of Bike and Style at the Munich Airport Center (MAC), located between terminals 1 and 2. Bike and Style is an action-packed event featuring spectacular freestyle shows and high jump contests with competing riders from around the globe. A special highlight this year was the mountain bike freestyling contest, putting top international riders to the test on 18 August 2018.

Larnaka and Pafos airports

In total, 74 BorderXpress interactive kiosks have been installed at both international airports in Cyprus. Designed by Vancouver Airport Authority’s Innovative Travel Solutions, they will enable each departing or arriving passenger to scan his or her identity card or passport as part of the passport control procedure. Each passenger will receive a receipt which must then be presented at a predefined checkpoint. At this stage, BorderXpress kiosks will be used only by EU citizens in arrivals, whereas at the exit immigration control all nationalities will be able to use the kiosks.

Tampere Airport

Finnish airport operator Finavia has unveiled the completed development and modernisation of the country’s Tampere-Pirkkala Airport. Finavia invested more than €17 million to increase the southern Finnish airport’s capacity and accessibility to the surrounding Pirkanmaa region. The enlarged apron and turning area means the airport can now accept widebody aircraft. Airport lighting was also replaced with energy-efficient LEDs and the improved ILS will improve the airport’s ability to continue to operate in poor weather. Much of the four-month project was conducted with normal airport operations going on around it.

London City Airport

This summer, London City Airport took the unusual step of offering free “dumb phones” to passengers in a bid to lure them away from attention-sapping smart devices, while on holiday. As part of a “self-imposed smartphone amnesty” travellers were asked to pledge not to use their iPhones and Android gadgets for at least 48 hours. Instead, they were provided with a credit card-sized Light Phone, which could only make and receive calls. Passengers were invited to keep the phone after the holiday. Airport bosses hope to encourage holidaymakers to detox from “digital distractions” such as social media, apps and work emails.
The global gaze gathered on Russia this summer, as the country hosted the world’s most-watched sporting event – the FIFA World Cup. For many visitors, Moscow’s Sheremetyevo International Airport was their first impression of the country on arrival, and their last impression on departure, and preparations included the opening of the impressive new Terminal B.

A year before the event, Sheremetyevo established a ‘situation room’ to coordinate all World Cup related activities, and anticipate any potential challenges. Numerous exercises took place to assess the terminals’ readiness to welcome guests and participants, including under the supervision of the FIFA Organising Committee. 800 volunteers were trained solely for the duration of the World Cup, and technical support points for holders of a FAN ID were situated in each terminal.

During the month-long tournament, Sheremetyevo served 33,800 flights (+16% year-on-year) and 4.7 million passengers (+11%). “The new Terminal B and inter-terminal passage reduced the load on the Southern Terminal Complex, and provided the teams, guests and fans with the best service,” explains Mikhail Vasilenko, CEO Sheremetyevo International Airport. “We served 703 flights with teams, families of football players, FIFA delegations and charter flights with fans, in just one month.”

These figures build on a successful 2017, in which passenger numbers increased by 17.8% to 40 million. Key airline partners Aeroflot and Nordwind Airlines significantly increased their services within Russia and to Asia.

“Our strategy to increase passenger traffic involves both further development with existing key carriers and proactive work to increase our competitiveness with the aim to attract new airlines,” says Vasilenko.

Last year, several new carriers launched services from Sheremetyevo, including China’s Beijing Capital Airlines and Lucky Air, the UAE’s flydubai, Cyprus’ Cobalt Air, and Turkey’s Atlasglobal.

It is worth noting the rapid development of traffic to Chinese destinations, which rose by 16% year-on-year. Last September, Sheremetyevo welcomed the launch of a twice-weekly China Southern Airlines service from Shenzhen, and the airport is building a role as a major hub connecting China and Europe.

“The Chinese aviation market has high potential. It is one of the fastest-growing markets, and is a priority for our further development,” Vasilenko comments.

“Sheremetyevo serves eight Chinese airlines, operating 15 daily flights on 19 routes. Beijing Capital Airlines launched flights from Hangzhou to Sheremetyevo in July 2018, with Hangzhou becoming the 19th Chinese destination on our route map.”

Sheremetyevo’s dynamic route development saw it ranked second in terms of growth in direct connectivity in ACI EUROPE’s Airport Industry Connectivity Report 2018.

Meanwhile, passenger numbers rose by 13% in the first six months of 2018 to 20.5 million. International traffic grew by 11%, and domestic traffic by 16%. The airport forecasts overall growth of 12% this year to 45.5 million passengers.

An interview with Mikhail Vasilenko, CEO Sheremetyevo International Airport. By Ross Falconer

Sheremetyevo’s ambitions to welcome 80 million passengers
Jelena Nikolic, RMJM Serbia’s lead

Jelena Nikolic, RMJM Serbia’s lead on the passengers flying into and real soul of Russia and leaving an impres - passenger flows while showcasing the could support an incredible increase in RMJM being based on the aesthetics of terminal’s special design.”

demonstrates the highest level of pas - and seamless check-in, and the departure and arrival halls, VIP and business lounges, seamless check-in, and the terminal’s special design.”

Indeed, Terminal B is visually striking, with the architectural concept developed by the Serbian division of British firm RMJM being based on the aesthetics of Russian Constructivism.

The brief asked for a design which could support an incredible increase in passenger flows while showcasing the real soul of Russia and leaving an impression on the passengers flying into and through Sheremetyevo Airport, explains Jelena Nikolic. RMJM Serbia’s lead

architect. “Our proposal based on avant-garde Russian Constructivism combines technology and tradition, past and future, culture and efficiency, transforming the terminal into a door through which Russia can tell its story and welcome the world.”

The architects focused on the works of Russian avant-garde artists of the early 20th century Lyubov Popova and Varvara Stepanova, who were pioneers of ‘industrial art’, combining social meanings and practical ideas. “So, they created the inte - riors of Terminal B on the basis of simple and clear geometric shapes saturated with bright colours,” Vasilenko adds. “The two stations of the underground inter-terminal passage are also decorated in the same style to create a unified visual space.”

Attention has also been paid to the multimedia systems in addition to the architectural and design solutions. There are ‘live’ digital panels in Terminal B, with the media system broadcasting visual images of Russia and its heritage, such as ballets, museums, historical sights, and cultural artefacts.

“Our passengers and guests take photo - and terminal navigation, among other services. “Travellers can get answers to their questions in Russian or English via the WhatsApp and Viber messenger services,” Vasilenko notes. “Sheremetyevo also communicates with passengers via official accounts on Facebook, Instagram, and VKontakte (a Russian social media platform).”

Quicker transfer times for baggage and passengers

A new baggage handling system was installed as part of the Terminal B and inter-terminal passage project. Built directly under the airfield are two tunnels. While one carries passengers, in the other tunnel is BEUMER’s autover Independent Carrier System, which transports baggage at speeds of up to 30km per hour.

“Quicker transfer times for baggage and passengers,” explains Klaus Schäfer, Managing Director, BEUMER Group A/S. “To offer the optimum system design for these requirements, we chose our autover solution because it provides a good, functional and reliable solution for baggage transport between terminals.”

The autover features a rail with no moving parts, which virtually eliminates the difficult task of carrying out maintenance in very long tunnels. In addition to the low maintenance requirements, the airport can also rely on having very little wear and tear on any parts installed in the tunnel.

Sheremetyevo Airport factbox

2017: 40 million passengers
2017 passenger traffic growth: 17.8%
2018 passenger traffic growth (HT): 13%
Key airline customers: Aeroflot, Nordwind Airlines, Pegas Fly, Air France, Air Astana
Number of routes: 200*
Top 5 destinations: St Petersburg, Sochi, Simferopol, Yekaterinburg, Paris-CDG

Mikhail Vasilenko, CEO Sheremetyevo International Airport: “The new Terminal B and inter-terminal passage reduced the load on the Southern Terminal Complex, and provided the teams, guests and fans with the best service. We served 703 flights with teams, families of football players, FIFA delegations and charter flights with fans, in just one month.”
“The autocarts, which carry the items through the system, offer a highly efficient baggage handling operation because the carts are maintained in a central location which avoids any system disruption,” says Schäfer. “This means Sheremetyevo is then able to send the carts for maintenance according to a pre-configured schedule, within operational hours.”

Reaching the contractual milestone for handover is often associated with lots of pressure, which is magnified when the airport plays an important role in big, international events such as the 2018 FIFA World Cup. “Needless to say, both Sheremetyevo Airport and BEUMER Group were very aware of this factor and made sure to plan the installation and commissioning of the baggage handling system to be sure it was ready on time,” Schäfer adds.

Sheremetyevo welcomed the FIFA World Cup trophy ahead of the tournament. It was presented to staff and guests by Alexander Ponomarenko, Chairman of the Board of Directors of JSC SIA (Sheremetyevo International Airport); Lothar Matthäus, captain of Germany’s 1990 FIFA World Cup champions; and Mikael Vine, Project Manager of the Coca-Cola System in Russia for the 2018 FIFA World Cup preparations.

The next stage in Sheremetyevo’s development programme is the new Terminal C in the Northern Terminal Complex. Construction is underway on the first phase – 118,000sqm – which will provide an annual capacity of 20 million passengers when complete in 2019. The second phase will see the addition of a further 86,000sqm, increasing Sheremetyevo’s total annual capacity to 80 million.

“Thanks to the inter-terminal passage, it won’t take our passengers much time to reach any terminal. It has reduced connecting time to 50 minutes, which is especially important for the effective transfer operations of Aeroflot,” Vasilenko explains. “The design of Terminal C will be based on the same aesthetic solutions that were implemented in Terminal B. At the same time, reconstruction of the apron, and parking facilities, is ongoing. The parking will be linked with Terminal C by a pedestrian walkway.”

Sheremetyevo’s long-term development programme to 2026 also includes reconstruction of runway 1, the commissioning of a third runway, construction of new aprons and aircraft parking positions to meet the growing demands of the airlines, and construction and commissioning of an Aeroexpress station in the Northern Terminal Complex.

The new facilities will transform Russia’s largest airport into a convenient and efficient passenger and cargo hub, a strong competitor among leading hub airports in Europe, and a driver of social and economic growth in Moscow and the wider region.

SVO priorities in 2018:

- Maintaining the high quality of service for airlines and passengers.
- Keeping the leading position in Europe in terms of service quality according to the ACI ASQ programme in the category of airports with a passenger flow over 40 million per year.

Main activities within SVO’s long-term development programme to 2026:

- Commissioning the third independent runway.
- Reconstruction of runway 1.
- Constructing new aprons and aircraft parking to meet growing airline demand.
- Construction and commissioning of Aeroexpress station in the Northern Terminal Complex.
IDENTIFYING POTENTIAL
CREATING VALUE

AviAlliance is a private airport investor and operator that contributes its expertise in the fields of aviation, non-aviation, master planning and financing. The portfolio includes shares in the airports of Athens, Budapest, Düsseldorf, Hamburg and San Juan.

www.avialliance.com
An interview with Vladimir Khizhnyak, Director Aviation Marketing and Commerce, Sheremetyevo International Airport, and Alexander Nikonov, Head of Foreign Airlines Division Aviation Marketing and Commerce Department. By Nick Preston

Sheremetyevo developing significant transfer potential

Sheremetyevo International Airport is currently doing really well, with 40 million passengers last year (+18%) and continued 13% growth in the first half of 2018. So, if we suddenly had a world without war, or no political tensions between Russia, Europe and North America etc, what sort of traffic levels do you think you would be achieving?

This would certainly help. In the US-Russia market most of the demand is originating from Russia. If there were no political tensions, the US market could easily be 50% bigger. Since 2014, growth of US traffic has slowed down. Traffic to Washington has decreased a little bit, but in general, traffic to the US is approximately at the same level as 2014/2015. Corporate traffic has decreased and that was the reason why Delta Airlines stopped operations at SVO at the end of 2017.

The total Moscow airports market will exceed 100 million this year – all three are growing together, but how intensive is the ongoing competition? DME traditionally took airline customers away from SVO and you have more recently taken them back – how much do you also want to compete with Vnukovo? Is there not a risk that Vnukovo will increasingly want to compete with SVO?

Moscow is quite a unique city in that it is large and separated north to south with three airports that all have capacity. All these airports would like more passengers. One of the main differences between Moscow and many other multi-airport cities is that the different airports are run by independent companies, which intensifies competition. Each airport has its advantages and our competitors are not standing still. We are all involved in an ongoing process of modifying infrastructure. Geographically, Sheremetyevo is convenient for the Chinese market. We were recently recognised as the best airport in Europe for customer experience at the ACI ASQ Awards, and OAG and FlightStats rate Sheremetyevo as one of the most punctual airports in Europe.

How significant is SVO as a transfer hub to Asian destinations – is a Turkish Airlines-style Europe-Asia transfer hub a tremendous, but currently unexploited opportunity for SVO?

About 38% of Sheremetyevo’s traffic is made up of transfer passengers. We are strongest in the China-Europe market, where we are the number one hub for transfer passengers. About 1,200 passengers transfer between China and Europe at Sheremetyevo, each way each day. Moscow is well suited as a transfer destination in this market, since it offers more or less even sector lengths between the origin and final destination. For most Chinese travellers coming to Sheremetyevo, Moscow still represents their final destination. We are trying to develop more transfer potential, but it can be difficult to change the existing mentality.

What are your most desired unserved routes?

We still have great potential for services to the Middle East. The UAE is well served, but we’re talking about the rest of the Middle East. There is also potential for Indian traffic and more links to the Asia Pacific region. Australia, New Zealand and the Philippines could be better connected. Fuel prices are currently making some of these routes uneconomic.

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Sheremetyevo International Airport’s new airline services in 2018. Source: anna.aero New Routes Database
EU funding for ATM modernisation: SESAR-Related Deployment Airport Grouping (SDAG)’s support to Europe’s airports (2014-2017)

20 airports (members of ACI EUROPE)
106 awarded projects (including 2 joint projects)
€189.5 million secured from Connecting Europe Facility (CEF) funding (including €96 million for joint projects)

Get in touch with SDAG to know what funding opportunities are available for your airport:
luc.laveyne@aci-europe.org
barbora.smolikova@airportgrouping.org
Edge of tomorrow

Every five years, EUROCONTROL issues its Challenges of Growth studies, taking stock of the available capacity in the European airport network. The latest edition provides timely insights into the state of play in a Europe that loves flying, but isn’t particularly keen on airport expansion. Robert O’Meara reports on the findings.
mid the airport branding campaigns, airline PR stunts and start-up-thronged travel scene of the past five years, the excitement may have made you a little blind to the phenomenal growth that air transport has almost come to take for granted. Did you know, for example, that between 2012 and 2017, European airports experienced passenger growth that amounted to an additional 513 million passengers? Few had predicted such traffic gains.

Over the past two decades EUROCONTROL’s Challenges of Growth studies have established a pattern of publication every five years. They are the only authoritative inventory of airport capacity in Europe.

Eamonn Brennan, who was appointed Director General at EUROCONTROL at the start of the year, took the stage at the ACI EUROPE & WORLD Joint Annual Congress in June, to announce the findings of the latest edition, forecasting the capacity challenges facing European aviation between now and 2040.

The outlook is not reassuring. The most likely scenario shows an increase of 53% in traffic – to 16.2 million flights a year. However, there are significant upside risks for this forecast and it may well be that the increase is as high as 84%.

Four countries will each see more than three thousand additional flights per day (the United Kingdom, Turkey, France and Germany). Even though airports are expanding their capacity plans, with the top 20 airports planning to add 2.4 million runway movements, this will not be enough.

Brennan warned “On our most likely scenario, there won’t be enough airport capacity for approximately 1.5 million flights or 160 million passengers in 2040. This kind of report is crucial for policy makers as they prepare for the future. Clearly this is a long-term forecast so we do have time to address the issues it raises but providing more airport capacity, and especially on this scale, requires long-term planning. I think we need to address the issue as a matter of urgency.”

Many airports will become much busier, with higher delays. The study estimates that by 2040, 16 major airports will be highly congested operating at close to capacity for much of the day (up from 6 airports today). As a result of this congestion the number of passengers delayed by 1 to 2 hours will grow from around 50,000 each day now to around 470,000 a day in 2040.

Traffic variability over the last ten years shows that we have to consider a range of possible futures in order to manage risk: no one single forecast could hope to include all the likely risks.

After a stakeholder review, four scenarios were selected and studied for this release of the Challenges of Growth. General consensus is that the most likely is the one labelled “Regulation and Growth”, which sees moderate growth regulated to reconcile demand with environmental sustainability issues.

Other topics covered in the study include the impact of climate change and the expected rise in unmanned aircraft systems, or drones.

Eamonn Brennan, Director General, EUROCONTROL, speaking at the ACI EUROPE & WORLD Joint Annual Congress in June. “On our most likely scenario, there won’t be enough airport capacity for approximately 1.5 million flights or 160 million passengers in 2040.”
Between 2012 and 2017, European airports experienced passenger growth that amounted to an additional 513 million passengers. Few had predicted such traffic gains.

In his keynote address Brennan underlined that the first five months of 2018 have seen much higher delays than in recent years: “Europe is already struggling to cope with the levels of traffic this year.”

Traffic has increased by 3.4% (compared to the same period in 2017) but en-route Air Traffic Flow Management delays have risen dramatically from 0.46 minutes per flight to 1.05 minutes per flight. 28% of this delay was attributed to disruptive events (such as strikes) and 27% to weather. However, 55% was attributed to staffing/capacity issues, notably in Germany, France and the Low Countries.

Reacting to the findings, Olivier Jankovec, Director General of ACI EUROPE commented “The Challenges of Growth studies are an immensely valuable forecast. This latest edition is very clear – people cannot continue to presume that air traffic growth – and the economic benefits that come with it – can happen without a corresponding increase in airport capacity on the ground. As it stands, the lack of airport capacity will result in €88.1bn in foregone economic activity in Europe by 2040, due to unmet demand for air travel and reduced air connectivity. This isn’t something that should just be of concern to the industry – air transport is a vital component of many people’s lives. This should be of concern to everyone who values the unparalleled connectivity, mobility and prosperity that airports bring to their communities.”

Aside from building additional runways, the study looks at how existing airport capacity can be optimised, through technology & innovation, schedule smoothing, using larger aircraft and multi-modal approaches.

Taking on board the findings, Henrik Hololei Director-General for Mobility and Transport at the European Commission, recently stressed the need for increased capacity both in the air and on the ground: “The risk of scarce capacity is the biggest challenge that aviation will have to face in the coming years.”

The European airport industry could not agree more and hopes that this will be borne in mind in the current review of the EU Directive on airport charges.
Oman Airports
Growing Gateways to Beauty and Opportunity
• Enhance the accessibility of air travel for persons with disabilities, including those with reduced mobility, when designing new facilities and improving existing ones.

• Discover new technology and innovative solutions such as check-in kiosks, low-level flight information displays and mobile apps.

• Adopt leading edge practices such as sign language videophone booths, accessible toilet facilities, wayfinding and signage.

This publication has been reviewed by the International Disability Alliance (IDA)
Over the past two decades, Europe’s airports have placed the passenger at the heart of their business strategies. Now able to assert their focus as B-to-C businesses, airports know that passenger satisfaction is closely linked to a better business performance. So, they are investing in diversifying their services to enhance the passenger experience through efficient operations, engaging communications and inspiring commercial options. These efforts are reflected in the level of passenger satisfaction – and they are analysed and recognised by ACI World through the ACI Airport Service Quality (ASQ) benchmarking programme.

The second edition of ACI EUROPE’s Guidelines for Passenger Services at European Airports – launched at the joint ACI EUROPE & World Annual Congress, General Assembly & Exhibition in June in Brussels – provides airports with useful insights into new developments and trends in the airport industry and passengers’ behaviour.

Speaking at the launch, Dr Michael Kerkloh, President of ACI EUROPE and President and CEO of Munich Airport said “Some airlines would still like airports to be just a shed – nothing more. That certainly flies in the face of what consumers actually want and expect. In Europe, corporatisation and privatisation have transformed airports from mere infrastructure providers to multifaceted businesses in their own right – focused on quality, efficiency and the passenger. Technology and digitalisation are now opening up exciting opportunities to deliver an integrated and much improved passenger experience. By increasing transparency and breaking operational silos between all partners – airports, airlines, ground handlers, Air Traffic Control, border & customs authorities and even surface access companies – technology and digital will allow us to put the passenger at the very heart of our processes.”

Customer service excellence requires constant evaluation and innovation. Airports have to adapt to passengers’ evolving needs and expectations. The Guidelines provide a clear methodology for doing this:

**Passenger categorisation**
A clear understanding of who your passengers are is essential to define the services your airport should offer.

**3P Approach**
Following on from the success of the first edition of these Guidelines, the 3Ps (Premises, Processes and People) are now well established pillars of the passenger experience. Clean, appealing and functional premises with clear signage create a good ambience for passengers and can easily guide them through the airport. This should be combined with efficient and smooth processes (e.g. check-in, baggage drop-off, security and boarding) to make all the steps in the journey at the airport as smoothly as possible. The third important element is staff. Providing quick assistance to passengers, treating them with respect and engaging with them to inform or help will contribute to a pleasant passenger experience. Staff training and engagement is, thus, paramount.

**The pyramid of passenger perception levels**
Managing expectations is linked to understanding what really matters to passengers. Three levels of passenger perceptions (“required”, “expected” and “valued”) can be used as tools to set goals for your passenger services.

**Quality management**
As an essential element in the evolution from a B2B to a B2C approach, quality management includes stakeholder engagement, quality control and continuous improvement. For instance, instant feedback devices play a crucial role in informing your airport about the need to take immediate action regarding staff behaviour or the state of the premises.

**New technology**
Discover how the latest trends in technology (e.g. wearable devices, AI and biometrics) can help your airport enhance the efficiency of its operations and strengthen engagement with passengers. Becoming digitally-enabled means that your airport can offer a better...
experience to passengers through more personalised and efficient services in all steps of the journey.

Case studies

In the competitive landscape of the airport business, we often learn quickly from the successes of others. That’s why the new edition of the Guidelines contains extensive case studies of best practice in passenger services at various European airports, highlighting how some of the best in class are diversifying their service offer, livening up their interaction with passengers and embracing new ideas and collaborations, to better cater to the evolving needs and expectations of air travellers.

Federico Bonaudi, ACI EUROPE Facilitation, Parliamentary Affairs & Regional Airports Manager, believes that these Guidelines will become a reference document for airports, like its first edition: "The passenger-facing aspect of the airport business is evolving rapidly. The second edition of the Guidelines for Passenger Services at European Airports is based on the methodology proposed by the first edition: the 3P Approach and the Pyramids of Passenger Perception levels, but we wanted to take into account the new developments and trends in the industry and share the knowledge gained. We revised all the chapters complementing them with subjects like data exchange, staff engagement, landside security and the future of baggage handling. We also added new chapters on Strategy and Quality control, as well as new case studies and testimonials. We hope this new edition of the Guidelines will be a useful source of inspiration for airports!"

The publication was produced by the ACI EUROPE Taskforce on the Passenger Experience, managed by Federico Bonaudi, with the active participation of airports (Aeroporti di Roma, Bologna, SEA Milano, Munich, Swedavia, Zurich, Lyon and Nice Côte d’Azur) and ACI EUROPE World Business Partners (SITA and TH Airport Consulting).

You can download the Guidelines at https://www.aci-europe.org/component/downloads/downloads/5591.html

If you would like to receive a hard copy, please email ines.rebelo@aci-europe.org
Many thanks to Team Heathrow and partners for all of their continuous hard work, helping us to become one of the ‘World’s Top 10 Airports’, and winners of:

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ACI EUROPE-SESAR WORKSHOP

THE DRONE AND THE AIRPORT: FRIEND AND FOE?

Integrating drone operations and services at airports.

SAVE THE DATE!
26 November 2018, Oslo
Hosted by Oslo Airport

The workshop will take place ahead of ACI Airport Exchange in Oslo (27-29 November 2018).
Registration coming soon.
Participation is free of charge.
With the continuous and evolving security threat challenging the aviation industry, and a strong demand for compliance with standards coming from the UN Security Council, ICAO and governments, it has become imperative that airports have the most effective, appropriate and cost-efficient security measures in place.

Consequently, ACI introduced its Airport Excellence (APEX) in Security programme a year ago, with the aim to play a key role in helping airports understand where they can improve, in terms of security standards, best practice and operational efficiency.

David Ryder, Head of Aviation Security, ACI EUROPE, comments: “The APEX in Security programme was launched in October 2017 and Cork Airport has been the first EU airport to take the opportunity to benefit from a peer review of all their security arrangements. The peer review has helped Cork Airport to assess their level of compliance with EU regulations while capitalising on best practices from other airports. APEX in Security is a win-win programme, both for the host airport and the assessors from other airports; Cork has definitely gained a big win by being at the forefront in this programme.”

Indeed, Cork Airport has been a great supporter of the ACI APEX programme from very early on. It has hosted APEX Reviews in both Safety and Security, while members of the airport management team have taken part in multiple APEX in Safety and Security Reviews as assessors. “The benefits this participation has brought to Cork Airport are substantial, both in terms of practical recommendations following the reviews we hosted and in terms of experience gained by those who have been assessors,” says Ken Roberts, Head of Operational Security & Police, Cork Airport. “Also, the building of professional networks enabled by the programme is very beneficial to individuals and the industry as a whole.”

The Cork Airport APEX in Security Review took place from 21 to 25 May 2018. In fact, the process began long before the review team even arrived in Cork. As well as preparing and dispatching the pre-review questionnaire and other requested documents, Cork Airport Security Management commenced an engagement process with staff and key stakeholders. “This engagement centred around briefing relevant parties on who was coming, why they were coming and what they would be looking at when they
The ACI APEX Review Team in Cork consisted of six assessors, the team leader, and two observers. One observer was from the TSA and the other from ACI.

“Mick Delaney, Deputy Head of Operational Security & Police, Cork Airport, at Lagos Airport in Nigeria.”

The team made many practical observations, which the airport is working through currently to maintain its high level of readiness for any serious security situation, or for any regulatory inspection or audit. "Maintaining high levels of operational and regulatory readiness in aviation security is like rolling a large boulder up a hill," says Roberts. "We can never stop or rest, or that boulder will immediately slip back down the hill. Maintaining our high level of operational readiness and everyday auditability is the challenge we set for ourselves. The APEX in Security Review has been a great way to assist us with this goal.”

Cork Airport has built a corrective action plan around the recommendations and prioritised them for action. Cork Airport Senior Management will be regularly updated on the progress on this action plan until all recommendations are closed out effectively.

“Journey to excellence in aviation security”

Meanwhile, both Roberts and Delaney have taken part in APEX in Security Reviews as assessors – Roberts at Windhoek Airport in Namibia, and Delaney at Lagos Airport in Nigeria. "Taking part in an APEX Review as an assessor is a really great opportunity for an aviation security professional to work as part of a team to deliver observations and recommendations to a host airport, assisting them on their journey to excellence in aviation security,” says Delaney. "The APEX programme also offers the opportunity to build strong relationships with your fellow assessors and with the colleagues you meet at the host airport. We have kept these lines of communication open long after the APEX reviews have been completed and have visited some of our colleagues and friends in peer airports for benchmarking and familiarisation visits.”

ACI delivers the APEX in Security programme to every member airport interested in achieving excellence in security. To request a Security Review, a letter signed by the senior executive of the host airport should be sent to the ACI Regional Office, with a copy forwarded to ACI World.

An APEX Review is not an audit. It is a peer review by industry professionals, which will issue the host airport with observations and recommendations. “If you are considering hosting an APEX in Security Review, I would encourage you to request it today,” Roberts concludes.
EXCELLENCE AS STANDARD

Providing an environment where visitors don’t merely dwell, but actively engage is part of Hamad International Airport’s vision.

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Human trafficking is far more prevalent, complex and close to home than most of us realise. What is it, in a nutshell? It’s a crime that entails the use of force, fraud or coercion to reap substantial benefit from another person’s labour in exchange for little or no pay. Most often, the victims are smuggled into a State illegally and threatened not only by the perpetrator, but also by the legal consequences of such entry, exacerbating their susceptibility to exploitation. For that reason, human trafficking is often referred to as modern day slavery.

Virtually every country in the world is affected by this crime, either as a country of origin, transit, or destination for the nearly 25 million people that are illegally trafficked every year. The challenge is to target the criminals who exploit people and to protect and assist victims of trafficking and smuggled migrants, many of whom endure unimaginable hardships in their bid for a better life. Since it’s a transnational crime, many victims pass through airports and onto international flights. Frequently, air travel is their last trace.

Unlike other illegal smuggling activities that rely on cargo, which can be searched or scanned, human trafficking often hides in plain sight. To that end, airports and airlines are among the industries that can help to combat these crimes, both through the training of their own staff in recognising and dealing with trafficking situations and by providing information to the public to raise awareness.

In support of the United Nations World Day Against Trafficking in Persons on 30 July 2018, airports and airlines came together to assume their critical role in this fight. Airports Council International (ACI) World and the International Air Transport Association (IATA) expressed their determination to assist authorities by reporting suspected human trafficking cases, and making it as difficult as possible for the global air transport network to be exploited for this evil trade. The industry has committed to raise awareness, help to train staff to recognise the signs of trafficking, and put in place reporting protocols to alert the appropriate authorities.

Every year thousands of human trafficking cases are reported, but many more go unnoticed, because human trafficking is such a hidden crime. Victims might be afraid to come forward or people may not be able to recognise the signs, even if it’s happening right in front of them. For this reason, raising awareness is critical in helping to combat this heinous crime. With this in mind, ACI and IATA have launched the #eyesopen campaign, inviting people to add an overlay to their profile pictures on Facebook stating “I have my #eyesopen on #humantrafficking” and share the resources available for airline and airport employees, such as the guidelines and training available on the websites of both associations.

“People trafficking is an appalling crime which we should do all we can to combat. The safety and security of passengers remains all airports’ number one priority and the airport community is determined to work with border authorities and our partners across the world in helping to put a stop to this activity. We stand together with our airline colleagues in keeping our eyes open to the signs of human trafficking. Many of our airport members are already demonstrating their commitment to the campaign. We continue to strengthen our combined efforts in awareness, training, and reporting,” said Angela Gittens, Director General, ACI World.

The reach of the week-long launch campaign led by IATA and ACI has been extended by many influential institutions and individuals spreading the word, including the United Nations Office on Drugs and Crime (UNODC), the International Civil Aviation Organisation (ICAO), Anita Mendiratta (Special Advisor to Secretary General of United Nations World Tourism Organisation) and Mira Sorvino (Oscar-winning actress and UNODC Goodwill Ambassador).

More than 40 international news publications reported on the campaign, helping to raise awareness about this joint industry effort. But this is merely the beginning of a process that will require dedication and persistence – more vigilant pairs of eyes are needed to tip the balance if we are to put an end to human trafficking for good.
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Airports as Brands and Businesses

The 28th ACI EUROPE/World General Assembly, Congress & Exhibition, hosted by Brussels Airport, took place on 18-20 June 2018. The theme of this year’s event was Airports as Brands and Businesses. The event attracted over 750 delegates from airports, airlines and ANSPs, as well as other aviation partners and the European Commission. The Annual Congress also saw the announcement of the ACI EUROPE Best Airport Awards.

The 29th ACI EUROPE General Assembly, Congress & Exhibition will be hosted by Hermes Airports in Cyprus on 25-27 June 2019.

Arnaud Feist, CEO Brussels Airport Company, delivered the Welcome Address from the Host.

Didier Reynders, Deputy Prime Minister, Minister of Foreign Affairs and European Affairs, gave a Welcome Address.

Bongani Maseko, CEO Airports Company South Africa, delivered a Welcome Address in his capacity as Chair of ACI World.

Dr Michael Kerkloh, President & CEO Munich Airport, was elected for a second term as ACI EUROPE President. “This is an interesting time in our industry and the wider air transport sector. Robust growth and yet, significant and fast-emerging risks. I’m not just talking about the usual cyclical nature of air transport, but also the volatile geopolitical situation, the disruption happening to the retail & other non-aeronautical revenues in our business and regulatory risk from the aggressive campaigning by airlines on the aero-revenue side.”

Carsten Spohr, CEO Lufthansa, delivered a keynote address on ‘Airports and airlines – a new partnership as a recipe for joint success’.

ACI EUROPE Director General Olivier Jankovec addressed the state of the airport industry with a focus on air traffic developments, economic and financial performance, challenges to airports’ business model, and changing connectivity patterns, as revealed in the ACI EUROPE Airport Industry Connectivity Report 2018.

Norwegian CEO Bjørn Kjos gave a keynote interview, which was facilitated by Victoria Moores, European Editor/Bureau Chief, Air Transport World.
The Airline Leaders’ Symposium was moderated by Andrew Charlton, Managing Partner, Exambela Consulting, with panellists including Martin Eurnekian, Executive Director, Corporacion America and President, ACI-LAC & Vice Chair, ACI World; Arnaud Feist, CEO Brussels Airport Company; Fred Lam, CEO Hong Kong International Airport and Second Vice President, ACI Asia-Pacific Regional Board; Joseph Lapuma, CEO Tampa International Airport; Bangani Maseko, CEO Airports Company South Africa and Chair, ACI World; Dr Michael Kerkloh, President & CEO Munich Airport and President, ACI EUROPE; and Thomas Woldbye, CEO Copenhagen Airports.

Hugh Aitken, Senior Director, Skyscanner, gave a special briefing: “In an era when a consumer might ‘ask Alexa’ where they should be going on holiday, how can an airport stand out as a brand? (And what top 10 travel trends should airports be thinking about?)”

Angela Gittens, Director General, ACI World, launched the new ACI ASQ Commercial Survey, providing insights on commercial performance and how to best optimise non-aeronautical revenues.

In a special Airport Carbon Accreditation presentation, ACI EUROPE Director General Olivier Jankovec presented certificates to five airports that have achieved Level 3+ Neutrality: Budapest, London Stansted, Brussels, Geneva, and Helsinki.

The Third Working Session focused on ‘Creating Fertile Grounds for Investment’. Moderated by Mike Tretheway, Executive Vice-President and Chief Economist, INTERVISTAS, the panellists included Nicolas Notebaert, CEO VINCI Concessions and President, VINCI Airports; Holger Linkwelter, Managing Director, AviAlliance; Andrew Carlisle, Airports Business Planning Director, Ferrovial Airports; Stephen O’Driscoll, Head of Division: Air, Maritime & Innovative Transport, European Investment Bank; Sidharath Kapur, President (Finance and Business Development) of Airport Sector, GMR Group; and Henrik Holdtøi, Director General for Mobility and Transport, European Commission.

Eamonn Brennan, Director General, EUROCONTROL, gave a special briefing on ‘The Challenges of Growth’. He explained that, by 2040, 162 million flights are expected - an increase of +53% compared with today. By 2040, 1.5 million flights will not be accommodated, with 16 very congested airports (versus 6 in summer 2016).
The Fifth Working Session focused on the ‘Airport brand and digital transformation: Where does the passenger journey begin and end?’ Moderated by Anne-Marie Pellerin, Managing Partner, Lam-Lha, the WBP contributions came from Jim Peters, Chief Technology Officer, SITA; Iyad Hindiyeh, Global Head of Strategy, Amadeus IT Group; Jørgen Ravn, Network Manager, Airmagine; and Gillian Ormiston, Solution Expert, Traveller Processing and Border Control, IDEMIA.

The conference closed with an industry insights interview with Angela Gittens, Director General, ACI World, and Alexandre de Juniac, Director General, IATA, facilitated by Oliver Clark, Senior Reporter, FlightGlobal.

The gala dinner featured the 13th ACI EUROPE Best Airport Awards. The winners were Tallinn Airport (under 5 million passengers), Bristol Airport and Sevilla Airport (5-10 million passengers), Hamburg Airport (10-25 million passengers), Rome Fiumicino Airport (over 25 million passengers), Amsterdam Airport Schiphol (Eco-Innovation Award), Pafos International Airport (Accessible Airport Award), Lene Bier-Simonsen Holling, Copenhagen Airport (HR Excellence Award), and Oxera Consulting LLP (WBP Recognition Award).

The Fifth Working Session focused on the ‘Airport brand and digital transformation: Where does the passenger journey begin and end?’ Moderated by Anne-Marie Pellerin, Managing Partner, Lam-Lha, the WBP contributions came from Jim Peters, Chief Technology Officer, SITA; Iyad Hindiyeh, Global Head of Strategy, Amadeus IT Group; Jørgen Ravn, Network Manager, Airmagine; and Gillian Ormiston, Solution Expert, Traveller Processing and Border Control, IDEMIA.

The official handover to 2019 ACI EUROPE General Assembly, Congress & Exhibition host, Hermes Airports, was performed by Arnaud Feist, CEO Brussels Airport Company and Eleni Kaloyirou, CEO Hermes Airports.

A special briefing on the 2018 EU-China Tourism Year was delivered by István Ujhelyi, Member of the European Parliament, Vice-Chair of the Committee on Transport and Tourism, Member of the Delegation for relations with the People’s Republic of China.

Dr Zheng Lei, President, Institute for Aviation Research, gave a special briefing on ‘Chinese aviation market developments’.

The two-day exhibition featured a diverse mix of airport suppliers, covering areas including automated valet parking, bag tag and bag drop solutions, baggage handling systems, currency exchange, digital advertising, IT solutions, lighting, retail, seating, and security.

The Fifth Working Session focused on the ‘Airport brand and digital transformation: Where does the passenger journey begin and end?’ Moderated by Anne-Marie Pellerin, Managing Partner, Lam-Lha, the WBP contributions came from Jim Peters, Chief Technology Officer, SITA; Iyad Hindiyeh, Global Head of Strategy, Amadeus IT Group; Jørgen Ravn, Network Manager, Airmagine; and Gillian Ormiston, Solution Expert, Traveller Processing and Border Control, IDEMIA.
Airports and airlines need to collaboratively idealise the experience they want to offer their passengers. Chances are that state-of-the-art technology can make it a reality, while also bringing unprecedented added value to passenger operations and management.

A collaborative passenger-centric digital strategy is the cornerstone of modern travel and passenger experience. This was the conclusion Vision-Box came to when it began to focus on the behaviour, attitudes, and needs of travellers on the airport journey and started to design passenger experiences and flows without obstacles, complicated processes and even paper documents. Coming away armed with a deeper understanding of passenger needs and matching them to existing mandatory processes, Vision-Box developed a collaborative digital platform that enables a complete passenger lifestyle transformation spanning the entire airport journey. It introduces face recognition as key identifier of passengers and as trigger of real-time data exchanges between airports and airlines within an ecosystem designed on privacy principles.

On the move and contactless
Face recognition clearance became the transforming element to engineer quick, seamless transactions. The enrolment and verification of traveller’s identity, as well as eligibility to travel, established at check-in the face as the unique essential identifier of the passenger. After that, the passengers are not required to present their documents or even to stop at any clearance stage. Face recognition cameras capture and authenticate facial features as travellers journey through the digital ecosystem.

Next-gen human interaction
Seamless Flow allows for a contactless on-the-move passenger flow where your face is your travel document, and new passenger interaction models evolve. New human-like virtual assistants, integrated into IoT (Internet of Things) touchpoints, engage with the passenger to point the right way, provide instructions or simply to wish a safe journey. Powered by Artificial Intelligence, they enhance passenger fulfilment and their familiarisation with the technology.

Mobile ID friendly options also emerge. The IoT-ready network allows for the detection and authentication of trusted virtual IDs on mobile devices containing biometric and approved virtual documents. Your mobile phone is your passport, but in this case you don’t need to take it out of your pocket.

These are some examples of evolving digital interaction models that convert the modern airport into a rewarding traveller ecosystem: simplified experiences, instant and unfettered passageways and a close, familiar communication not only between humans and machines, but also all between humans and airport and airlines management. This is where collaboration is key.

Privacy-designed data orchestration
Vision-Box information management framework allows for the use of data in a way that it generates value and protects the passenger at all times. Vision-Box converged shared services on Orchestra™, a common-use passenger management platform integrating the entire network of IoT devices and passenger flow assets. It is the only identity management platform certified in Privacy by Design™. It prioritises the protection and privacy of individual data as a system default. Data sharing is enabled by the inputs and permissions defined by the passenger. It is then channelled across stakeholders according to privacy rules, to allow for real-time authorisation for clearance at different moments of the journey and to unlock personalised services.

In-depth big data analysis harnesses the value of this digital network, translating it into real-time situational awareness and insightful patterns. Eventually, airports and airline management achieve an augmented decision-making capacity to improve flows, operational efficiencies, security and excel in passenger services.

Taking flight
The aviation industry is navigating the digital era seamlessly. Sydney, Bangalore, Aruba, and Schiphol international airports are prime examples of passenger-centric modern airports. On top of a collaborative shared services orchestration platform, they have idealised their passenger experience. New disruptive but scalable technologies at the service of an enhanced individual passenger experience and of a connected, friendly, seamless ecosystem. Biometrics is the new normal.
This past year, a record number of airports around the world have been empowered to take climate action. The results of this collective effort have now been harvested and analysed and made available for you to peruse in the latest Airport Carbon Accreditation Annual Report.

To get your copy, go to: www.airportcarbonaccreditation.org

- **347,026 tonnes**
  - Aggregate scope 1 & 2 CO₂e absolute emissions reductions from airports at all levels

- **5.3%**
  - Aggregate scope 1 & 2 CO₂e absolute emissions reductions from airports at all levels (in %)

- **0.24 kg**
  - Scope 1 & 2 CO₂e relative emissions reductions per passenger from airports at all levels

- **672,000 tonnes**
  - Amount of CO₂e offset

- **237 accredited airports**

- **48 new accreditations**

- **25% Growth** since the previous year

- **133 in Europe**

- **10 in Africa**

- **34 in North America**

- **16 in Latin America & Caribbean**

- **48 new accreditations**

- **43% of passengers welcomed by accredited airports**
This past year, a record number of airports around the world have been empowered to take climate action.

The results of this collective effort have now been harvested and analysed and made available for you to peruse in the latest Airport Carbon Accreditation Annual Report.

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28th AIRPORT COMMERCIAL & RETAIL CONFERENCE & EXHIBITION

18-20 March 2019, Harpa, Reykjavik, Iceland

Hosted by: Isavia

For further information www.aci-europe-events.com
The Occurrence Reporting regulation in the EU has been in place for a number of years. However, implementation and practices vary significantly across EASA’s 32 member states. Almost 100 representatives of airports, airlines, and national aviation authorities gathered at Frankfurt Airport on 14 June for a one-day workshop to share their views and questions on Occurrence Reporting. By John Franklin

Occurrence Reporting – a key driver for a data-driven approach to future safety initiatives

Regulation (EU) 376/2014 on the reporting, analysis and follow up of occurrences in civil aviation will be well known to anyone involved in the safety side of the airport business. The European Commission led the development of this regulation, which has been in force since 2015, as well as the Commission Implementing Regulation 2015/1018 listing the mandatory reportable occurrences. Through EASA’s collaborative work with the airport and ground handling community both ACI EUROPE and EASA had agreed that further efforts to strengthen and support improved implementation on Occurrence Reporting would be a great initiative.

The workshop highlighted some specific areas for further work within the collaborative efforts described. These included:

Understanding and Awareness of the Occurrence Reporting Process

The workshop discussed the challenges airports face in interpreting the Regulation and understanding what is expected within the process of occurrence reporting. These included...
the reporting timelines, knowing what types of events should be reported and the need for parallel reporting of the same event by different stakeholders were consistent themes during the presentations and discussion that followed. Such questions were raised by airports, airlines and authorities alike. In these areas, EASA and national aviation authorities are continually working on ways to help streamline the reporting process through the electronic transfer of reports in ECCAIRS (European Co-ordination Centre for Accident and Incident Reporting Systems) format. Airports are encouraged to seek assistance from EASA or their national authority if they have any questions or problems with regards to these electronic processes.

For the parallel reporting streams from different stakeholders for the same occurrence, EASA highlighted the importance of receiving the different viewpoints on reportable occurrences. The different reports were critical for effective analysis of key risks and to help identify the best mitigations. While there might be a general perception that reports disappear into a “black hole”, they are in fact collated into the European Central Repository (ECR), managed by the European Commission, which is a vital source of information for the collaborative analysis activities described earlier.

The workshop helped provide a better understanding about the topics for which more information and guidance is needed. This will help to shape future Safety Promotion material on Occurrence Reporting and also to help inform the European Commission on different ways to improve the implementation of the Regulation.

Using Occurrences as Part of a Data-Driven Approach to Safety Decision Making

During the workshop airports expressed an interest in having greater access to the collective data set of occurrences by reported stakeholders into the ECR. Many airports are not aware that they can request aggregated safety information from the European Central Database through their national aviation authorities and EASA will promote this service more in the future.

Additionally, there was an interest for airports (and other stakeholders) to have more information on the analysis of safety issues in airport operations to support the Safety Management Systems of their own organisations. With the establishment of the Aerodromes and Ground Handling CAG, the subsequent results of analysis and Safety Risk Management activity will be made more widely available to stakeholders as part of the Agency’s updated Safety Promotion Plan. The first example of this is in the EASA Annual Safety Review 2018 (https://www.easa.europa.eu/document-library/general-publications/annual-safety-review-2018), which contains the Safety Risk Portfolio developed through the Aerodromes and Ground Handling CAG.

Events such as this workshop provide a great opportunity to work collaboratively across the industry. If we are to create the best possible risk picture and then take the most appropriate mitigations and actions it is important that we all work on Safety Together!

John Franklin is Head of Safety Actions at EASA.
Vanderlande is the global market leader for value-added logistic process automation at airports. Vanderlande’s baggage handling systems move 3.7 billion pieces of luggage around the world per year, in other words 10.1 million per day. Its systems are active in 600 airports including 13 of the world’s top 20.

Taking passenger experience into consideration, airport operators must find a perfect balance between offering travellers stress-free, relaxing journeys combined with expedient and swift movement through checkpoints. Vanderlande offers PAX OPTIMA advanced checkpoint solutions – designed to increase security, reduce costs and offer an improved passenger experience.

› vanderlande.com
Last year, Peter Marshall launched his www.trunblocked.com blog. It has certainly rocked a few airport and travel retail industry cages, as it deals head on with issues that are largely avoided by them and by the trade press. We caught up with him and asked him to explain the rationale for the blog.

Can a blog change an industry mindset?

Peter, what prompted you to create www.trunblocked.com?

Peter Marshall: I think I should have launched this well before last year. I have been in the B2B business for 23 years and have worked for clients in all key aviation industry sectors – airports, operators and suppliers. As you know, I run the industry’s video-only website, www.airportdynamics.tv, which has become a referential source for coverage of major new airport infrastructure and travel retail development projects. I also co-founded, and was publisher of, the Travel Retail Business magazine in 1997 (exiting 7 years later). I believe in this industry, but over the years have witnessed an extraordinary amount of complacency, greed, lack of imagination and lack of innovation. When I had a heart attack two years ago, that really focused my mind on what I wanted to do and the sort of clients I wanted to work with. It also made me determined to express long held opinions about the state of the industry in a wholly independent way. That’s why www.trunblocked.com does not accept any advertising at all – it provides my contributors with a platform for complete freedom of expression to air issues that need to be addressed.

So, what type of issues are you referring to?

PM: Principally, they are to do with the travel retail industry, which is such an important arm to airport revenues. It seems to offer nothing new in an ever-changing digital world, where increasingly discerning customers want more of everything – now. Everywhere you travel, you see the same categories and largely the same designs. Prices are far too high and customers are voting with their feet by spending less and less. The MAG should be changed to a different model. Where possible I think there should be greater direct airport involvement in the commercial area. By this I mean sharing the risk/reward of the commercial offer – like the JV between CDG and Aelia in Paris. Of course, this cannot be applied to all airports, but it should be considered by many in the 15 million+ passengers arena.

Is anyone listening?

PM: Difficult to judge, but the figures seem to suggest that there is a real following in the market for an editorial-only vehicle like Trunblocked. Views are regularly over 2,000 per week, including an average of 50+ CEOs and the numbers are growing. We cover 39 countries across all continents. I need to work on Russia, though, and may need a Chinese version.

Which are the most popular features?

PM: They tend to be those relating to retailers, or issues relating to new categories, new brands and, most importantly, tech. Tech is perhaps the most important area for trunblocked.com readers. A lot of airports and retailers tend to believe in their own PR – that’s a dangerous thing. There is an undeserved arrogance there. They are supported generally by a fawning, lazy, unchallenging trade press,
who do little more than replicate press releases. The plain fact is that this business is considerably behind what is out there. Online retail is an increasing threat to the very lifeblood of this industry. Not enough is being learned or adapted from the domestic marketplace.

Yet, we do see some green shoots with what Heathrow, Frankfurt and Auckland are doing with AOE’s OM3 e-commerce platform, which surely has to be the way forward for this industry to protect and increase retail revenues. You have to look, too, to what is being developed by Singapore Airlines and AirAsia. But the entrenched conservatism of the business, and the push back from IT in many companies, actually precludes the speed of development required to stay in the game. It’s an issue of culture and ‘not invented here’ syndrome. I would argue that many airports and retailers simply do not have the internal resource to create what is required. They need to understand that they have to go outside, as well as fundamentally change the culture inside.

So, is trunblocked.com just a forum to criticise?

PM: Not at all. Its aim is to raise and discuss issues that are generally avoided by the industry. Effectively to try and change the current mindset on issues that affect day-to-day decisions. We try to be constructive and, critically, write in a serious but also entertaining way. I have been delighted with the contributors. Some have elected to write anonymously, it’s true, but that does not take away the value of their content.

You recently announced the inaugural www.trunblocked.com TRU-Star Awards. Would you say they were emblematic of what you are trying to achieve?

PM: Yes. Absolutely. They are a combination of serious recognition awards, as well as highlighting industry lemons, together with the odd spoof. There are 19 awards in total, many brand-new categories for the industry, with clear reasoning given behind the votes for both winners and losers. The hope is that, for those nominated for the ‘walk of shame’, as it were, that they actually do something to change.

Do you worry about upsetting people?

PM: Not at all. None of the panel of 7 judges for the TRU-Star Awards knew who the others were. Their industry experience actually spans over 120 years and they come from all sides of the industry - airport, retailer, brand and outside consultants. Their inputs were wholly independent and uninfluenced, which is precisely what we aim for with all the content on Trunblocked.

Yet there was remarkable consensus in their responses. My view is that these awards should be taken in the spirit intended. Everything that has been written is true and reflective of individual experiences. Well, maybe with the exception of the spoof!

If there was one word that you think best expresses your attitude and character, what would it be?

PM: Well, one probably won’t do. Probably three and they would be: passion, perfection and perseverance.
Finland is one of the world’s hottest travel destinations. Ranked third on Lonely Planet’s Best in Travel 2017 list, the country (pop. 5.5m) attracted 8.3 million international visitors last year, according to Visit Finland. It is an intriguing mix of urban and rural – from the Northern Lights, to beautiful national parks and lakes, and the vibrant seaside city of Helsinki.

Robust air transport infrastructure is vital to the country’s economic prosperity. Its relative remoteness means international connectivity is a key factor, not only in tourism, but also in the growth of the electronics, engineering, manufacturing and biotechnology industries on which Finland’s economy thrives, as well as enabling these businesses to sustain their competitiveness in the global marketplace.

Finavia’s network of 21 airports experienced 11.9% growth in the first six months of 2018, handling 12.3 million passengers. Helsinki Airport served a record 10.1 million, and the direction is good not only at Finavia’s major but also its central regional airports. The figures reflect both the favourable economic situation (Finland’s GDP rose +2.6% to €224bn in 2017), and Helsinki’s strengthened position as a hub for air traffic between Europe and Asia.

Indeed, Finavia is building on this with a €1 billion investment programme to support the competitive position of Helsinki Airport. Leading these efforts is Kimmo Mäki, the new CEO of Finavia. He took the helm in January 2018, having previously been CEO of Port of Helsinki Oy for the past six years. Prior to that, he worked at Steveco Oy and Stockmann Oyj.

“It’s great to work in a company that plays a key role in the competitiveness and accessibility of Finland,” says Mäki. “My initial priorities have included starting a dialogue with our organisation and getting an understanding about the needed improvements. It has been great to see that the performance was already on such a high level, so there was no need for major changes.”

His extensive experience of the logistics industry encompassed similar challenges to those of an airport company such as Finavia, notably in terms of leading a customer-oriented service business and the successful implementation of large-scale investments. “There are a few priority principles that are important to me: to listen to and understand both your customers and organisation, never fail the trust, understand the position of your organisation in the big picture, and be humble but determined when facing new challenges,” Mäki explains.
Reflecting the dynamism and diversity of people at the heart of the airport business

Kimmo Mäki, CEO Finavia: “My initial priorities have included starting a dialogue with our organisation and getting an understanding about the needed improvements. It has been great to see that the performance was already on such a high level, so there was no need for major changes.”

As a key part of his Finavia familiarisation process, he aims to visit all of Finavia’s airports by the end of the year. “Only a few Lapland airports are still waiting for the winter season, in order to visit them during the hectic part of the year,” Mäki comments. “It has helped me to understand how complex our airport network is. Although the airports may seem quite similar, all of them are unique and different in many ways. We should also understand that at our headquarters. It has been a pleasure to meet the local people and to understand the important work we are doing at Finavia.”

€1bn investment programme to maintain connectivity

Helsinki Airport offers fast and smooth connections to Asia, and is Northern Europe’s leading transit airport. Indeed, Finnair recently announced it will increase frequencies on its routes from Helsinki to Osaka, Tokyo, Hong Kong and Guangzhou for the 2019 summer season.

In 2017, the number of transit passengers at Helsinki increased by 17.6%. The current €1 billion investment programme will maintain Finland’s excellent connectivity, and facilitate continued traffic growth. Helsinki welcomed 19 million travellers in 2017 (+10% year-on-year) and over 21 million are expected in 2018.

“A key priority is ensuring that the development programme at Helsinki Airport is proceeding smoothly. One of the challenges is to ensure that customers have a good travel experience during the construction period,” says Mäki. “We are growing very fast together with our airline customers and the investment programme will allow Helsinki Airport to serve 30 million passengers annually. In order to keep the good customer experience towards both airline customers and passengers, it is our top priority to succeed in the programme. Helsinki Airport’s strengths include short transfer times, friendly staff and innovative world-class services. We want to maintain these strengths, even as passenger numbers grow.”

The Helsinki Airport Development Programme will be completed in 2022, including expanding the terminal area by 45% or 103,000sqm, doubling the number of wide-body gates to 16, increasing both baggage handling and passport control capacity by 50%, renovating 45,000sqm of apron, and opening a multi-modal transport interchange.

Kimmo Mäki curriculum vitae

Kimmo Mäki (43) joined Finavia as CEO on 1 January 2018.

Previous experience:
- 2011-2017: CEO, Port of Helsinki Oy
- 2006-2011: Senior Vice President, Steveco Oy
- 2003-2006: Logistics Manager, Stockmann Oy

Positions of trust:
- 2018-present: Chairman of the Board, Airpro Oy and RTG Ground Handling Oy
- 2018-present: Chairman of the Board, Lentoasemakiinteistöt Oy
- 2017: Chairman of the Board, ANS Finland
- 2017: Chairman of the Board, Finnish Port Association

A crucial stage will be reached in 2019. Finavia recently announced it will begin the expansion of Terminal 2 next spring. Meanwhile, a large central square, the Plaza, will be built between the south and west piers, becoming the heart of the extension. At the same time, a new security checkpoint for Asian transfer passengers will be opened, and later on, an expansion to the border control section. By summer 2019, the first section of the new west pier will open, including six new gates for wide-body aircraft. The rest of the pier will be finished by late-2019.

These developments are being undertaken with a strong commitment to sustainability. Indeed, Helsinki Airport is accredited at Level 3 Neutralty of ACI’s Airport Carbon Accreditation. Meanwhile, six other Finavia airports – Enontekiö, Ivalo, Kemi-Tornio, Kittilä, Kuusamo and Rovaniemi – are accredited at Level 2 Reduction.

Looking ahead, the main priority for Mäki, and the Finavia organisation, is to implement and execute a comprehensive, customer-oriented strategy.

“We are focusing on customer experience, improving our capacity, improving our commercial services, and cooperation with our airline customers. We consider corporate responsibility throughout everything we do, with safety being our guiding principle. In our environmental work, we set the bar high. We promote Finnish people’s global citizenship and our activities boost the economy. We also want to be a good employer, as none of this would be possible without skilled and motivated employees.”
Final preparations underway for opening of İstanbul New Airport

Technologically-advanced, architecturally-breathtaking, and constructed in just three-and-a-half years, Istanbul New Airport will be the biggest air travel hub in Europe, with an ultimate annual capacity of 200 million passengers.

On 29 October, which marks the 95th anniversary of the Republic of Turkey, what will be the biggest airport in the world built from scratch is due to open with a spectacular ceremony.

Just two days after, Turkey’s flag carrier, Turkish Airlines, will make the first passenger flight from İstanbul New Airport. The first overseas flights will be to the Turkish Republic of Northern Cyprus and Azerbaijan.

Training as part of the ORAT (Operational Readiness and Airport Transfer) process is well underway. The ORAT process at İstanbul New Airport started in 2016, in consultancy with Incheon International Airport Corporation and Copenhagen Airports, aiming to evaluate the general readiness of facilities, systems, procedures, equipment and trained operations personnel. These trials have also allowed the participants, who are the end users of Istanbul New Airport, to simulate their processes under real operational conditions before the launch.

“A transfer to an airport that will reflect Turkey’s strength and potential for growth, and turn a new page in aviation history, will take place,” says H. Kadri Samsunlu, CEO and General Manager, İGA. “We have finished all preparations for the transfer to İstanbul New Airport. We have especially made significant progress in the operational preparation part, which is the first stage of ORAT. We’ll carry out three major trials in the coming month. We are working on scenarios based on 105 different subjects and events.”

The ORAT work-flow, class and field training will be followed by three trial periods:

- **1st Trial Operation (last week of September):** 1,000 faux-passengers, 2,000 faux-pieces of luggage, around 800 staff members from operational stakeholders and public institutions, two real aircraft (Turkish Airlines) and 50 pieces of ground service equipment.
- **2nd Trial Operation (first week of October):** 3,000 faux-passengers, 6,000 faux-pieces of luggage, around 1,000 staff members from operational stakeholders and public institutions, three real aircraft (Turkish Airlines) and 150 pieces of ground service equipment.
- **3rd Trial Operation (second week of October):** 5,000 faux-passengers, 10,000 faux-pieces of luggage, around 1,000 staff members from İGA, operational stakeholders and public institutions, five real aircraft and 200 pieces of ground service equipment.

“The transfer to İstanbul New Airport will be the biggest-ever airport transfer in the world. There have been no airports transferred further than 45km in the world,” Samsunlu comments.

“Since 2016, we have been meticulously carrying out our works regarding the transfer to Istanbul New Airport. At this point, we have finished the training of airlines, particularly Turkish Airlines, ground services and other stakeholders, all in order to ensure their orientation to the airport in the operation preparation process.”

Between 25 and 30 October, only a limited number of flights will be conducted at Istanbul New Airport for the purpose of removing materials and equipment from Istanbul Atatürk Airport. The transfer process will start on 30 October at 03:00 and end on 31 October at midnight.

Both airports will offer flights in a limited number during this 45-hour process. As of midnight on 31 October, Istanbul Atatürk Airport will be closed for scheduled and non-scheduled domestic and international commercial passenger transport.

When all phases are complete, the new airport will host around 100 airlines flying to more than 350 destinations, with an annual passenger capacity of up to 200 million. 

İSTANBUL NEW AIRPORT

The official opening of İstanbul New Airport is scheduled to take place on 29 October. The first phase of the new mega-hub includes two runways, a terminal, and an annual passenger capacity of 90 million. By Marta Dimitrova
THAT’S WHY WE INTEGRATE OPERATIONAL SOLUTIONS TO BOOST AIRPORT PERFORMANCE.

From improving safety and customer service, to lowering costs and using infrastructure more efficiently – as a modern airport operator you are challenged in all these areas – and more. To reach your full potential, you need a partner with the experience of transforming airport performance.

Working with ADB SAFEGATE, you can tackle each challenge with confidence. We have the experience and solutions to help you cut lighting costs and power consumption, make better use of runway and gate capacity, shorten taxi and turnaround times and provide the safest and most efficient routes from runway to gate. Want to be the best? Work with the best – ADB SAFEGATE.

www.adbsafegate.com
As part of Hamburg Airport’s €120 million investment to renovate its 33,000sqm Apron 1, the airport has chosen ADB SAFEGATE to install Europe’s first-ever Follow the Greens operations, where individually controlled green lights guide the pilots safely towards the runway or parking positions.

OneControl, the integrated controller working position from ADB SAFEGATE, will help the airport achieve this. The solution introduces new user interface concepts by combining functions that traditionally reside in separate systems into a single screen application. Additionally, the system is capable of controlling the lighting infrastructure of the advanced Follow the Greens concept to enable smoother, safer and more efficient operations.

“Our partnership with Hamburg Airport began in 2016, introducing Safedock, our Advanced Visual Docking Guidance System (A-VDGS), and SafeControl Apron Management (SAM),” says Christian Onselaere, CEO ADB SAFEGATE. “The integrated controller working position now adds apron control solutions to our portfolio offer in Hamburg. The upcoming terminal extension, as well as the refurbishment of the apron surface, will lead to a changing environment, hence support for apron controllers is needed.”

The solution incorporates important Air Traffic Control systems into one consistent and user-friendly interface. It combines multiple functions, starting with surveillance and airport safety support, as well as routing and guidance service, adding workflow support, displaying meteorological data and allowing AGL monitoring and control. By showing this information on a single screen eliminates the need to keep track of multiple screens, therefore reducing apron controller workload and lowering the risk of incursions and safety incidents.

By integrating traditional ATC systems into a single solution, ADB SAFEGATE can provide additional functionality and safety features, which would not be possible if systems are separated. For example, combining surveillance systems and clearance data with routing and guidance via Follow the Greens makes it possible to track the aircraft or vehicle movements and detect route deviations early on to alert controllers before accidents occur. The solution is also a vital data generator for the Airport Collaborative Decision Making (A-CDM) platform and helps to increase predictability and efficiency.

“With OneControl, Hamburg Airport is ready for future traffic growth,” Onselaere comments. “The project will run in several phases, supporting the airport in its development plans and facilitating a smooth transition in the individual refurbishment steps.”

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The first stage allows Hamburg Airport to manually control lights via dedicated buttons in OneControl, while the second phase will enable automatic control via Follow the Greens.

“Our customers have the option to extend the solution by additional functionality using the same technological infrastructure. This means that the customers invest in a future-proof solution that is very flexible, and it can be expanded to fit customer needs,” Onselaere concludes.

Marta Dimitrova speaks to Christian Onselaere, CEO ADB SAFEGATE, as the company expands its portfolio of intelligent solutions at Hamburg Airport.
Multifocal sensor technology

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Dallmeier is one of the world’s leading providers of products for network-based video security solutions. The multifocal sensor system Panomera® was specially developed for the all-encompassing video surveillance of expansive areas. In conjunction with intelligently designed video management and analysis systems Panomera® offers unique capabilities for ensuring landside and airside safety and security as well as optimising airport operations.

www.dallmeier.com

...IT WORKS!®
Perimeter protection is, of course, a top security priority for airport operators. A number of recent incidents involving unauthorised access onto airfields have highlighted the need to ensure that airport perimeters are effectively monitored.

"It is important to be able to use a video system to track an intruder, but the ultimate goal is to prevent an intrusion in the first place," says Christoph Kreis, Sales Manager, Dallmeier. "IR (infrared) cameras are a key component of any video security system that must provide around-the-clock monitoring capabilities."

Another crucial consideration is ensuring that video security solutions are future-proof. "Owing to the open system architecture of the Dallmeier solutions, the video system remains flexible and scalable. Future expansions or modifications are easily possible. Hence the solutions by Dallmeier offer long-term investment protection," Kreis explains. "Dallmeier is always working to further improve existing products, as well as developing new technologies. While some of our developments are focused on certain application areas, it is our philosophy to address the needs of customers by relying on our collective experience and expertise, and to provide them with customised complete solutions based on our entire product range."

Panomera was specially developed for the all-encompassing video surveillance of expansive areas. With Panomera, huge widths, as well as areas with large distances, can be displayed with a high resolution quality, in real time and at high frame rates of up to 30 frames per second.

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Panomera was specially developed for the all-encompassing video surveillance of expansive areas. With Panomera, huge widths, as well as areas with large distances, can be displayed with a high resolution quality, in real time and at high frame rates of up to 30 frames per second. A significant area can be surveyed from a single location and, depending on the customer’s needs, the resolution can be scaled nearly limitlessly. For example, one Panomera system equipped with eight sensors is said to be sufficient to replace up to 35 standard megapixel cameras.

"So, we are also offering a cost-efficient video security solution," says Kreis. "Now, considering that airports typically do cover large areas, the ability to clearly recognise and identify objects even over long distances – for example, from the apron down the runway – is an intriguing proposition for operators. Even more so, as Dallmeier complements its monitoring systems with high-performance and user-friendly video management and analysis tools. Those are becoming increasingly important in regard to optimising key performance indicators, such as turnaround times."

In conjunction with intelligent video analysis and management systems, the monitoring of all landside and airside areas contributes significantly to the overall safety and security of visitors and passengers, as well as maintaining smooth operations across the airport. It, therefore, appears clear that proactive video monitoring, rather than passive surveillance, is the way forward across different industries, including airports.
Seville Airport
Europe’s Best Airport according to Airports Council International (ACI)

In recognition of the work carried out in recent years to improve the quality of its facilities and the services it offers both airlines and travellers, possible thanks to the efforts of all its workers.

*Source: Aena, based on ACI Mundo*

The world’s leading airport operator by number of passengers.*
Sevilla Airport embarking on “most ambitious transformation in nearly 30 years”

Sevilla Airport was joint winner of this year’s ACI EUROPE Best Airport Award in the ‘5-10 million passengers’ category. Jesús Caballero, Director, Sevilla Airport, told Ross Falconer about the current major terminal transformation project, and strong community engagement strategy.

For Sevilla Airport, the ACI EUROPE Best Airport Award in the ‘5-10 million passengers’ category is recognition of an enormous effort over the last five years to improve the quality of the facilities, as well as the services offered to airlines and passengers.

A quality plan launched in 2014 saw the emergence of 100 initiatives, with new ones added as each is completed. Since then, over €4.4 million has been invested in these initiatives, such as opening and expansion of the VIP lounge, refurbishment of boarding lounges, expansion of passenger screening, and installation of automatic boarding pass readers, to name just four.

The next major project is the transformation of the terminal building, which Jesús Caballero, Director, Sevilla Airport, describes as “the most ambitious we have undertaken in nearly 30 years”. Plans are currently being finalised, with the aim of going out to tender in Q4 2018. Works will then begin in Q1 2019 and be completed towards the end of 2021.

“This transformation will allow us to modernise our facilities, streamline airport processes, offer airlines more efficient stopover times, and move from a declared operational capacity of 6.5 million passengers per year to more than 10 million,” Caballero explains.

Indeed, the expansion will accommodate a rapidly-growing throughput. Passenger numbers rose by 27% to over three million in the first half of 2018. Coupled with a 30.6% increase in seats scheduled by the airlines for the summer season, this suggests 2018 will again be a record year for the airport.
Passenger screening and passport control improvements

The ACI EUROPE Best Airport Awards judges commented on Sevilla Airport’s improvements in security, with increased skilled security staff and passenger assistance.

“Passenger screening and passport control represent two of the most tedious processes for travellers passing through an airport, so our work has been aimed at streamlining both processes,” says Caballero. “In the case of passenger screening, in 2014 we carried out a first expansion that allowed us to increase our operational capacity by 50%. This project also included the installation of automatic boarding pass readers and screens with passenger information concerning objects that should be placed in the trays.”

Staffing has been reinforced at peak times, and an awareness campaign developed to ensure attentive, friendly treatment of travellers by security staff.

“At the moment, we are working on a new 200sqm expansion of passenger screening, incorporating new support furniture to make passenger transit a more comfortable experience, as well as 30% more capacity,” Caballero comments. “As for passport control, we have added four new cabins – two in arrivals and two in departures – and in a few months we will also have automatic readers.”

Sevilla is a family-friendly airport, with dedicated spaces especially designed for children at the boarding gate areas. “The objective that underlies each improvement we undertake at Sevilla Airport is to offer the passenger the most satisfactory experience possible in their transit through our facilities, and that means thinking about their children,” says Caballero. “Details such as the installation of children’s games, the availability of toilets with changing facilities, or access to security screening specifically designed for baby strollers, all contribute to facilitating the movement of families through our airport.”

The awards judges also noted the airport’s comprehensive communication strategies at local, national and international level, which have enhanced and developed relations with the local community. This includes school visits; open days for plane spotters; guided tours for groups with special needs; support for students of Aeronautical Engineering, Journalism and Tourism in their university projects; the promotion of reports, interviews and radio and TV programmes; videos for the Aena YouTube channel; and meetings with local institutions responsible for promoting Sevilla as a business and tourist destination.

Connecting Sevilla with the World

Sevilla Airport has worked intensively in recent years to promote connectivity, establishing the ‘Connecting Sevilla with the World’ working group in collaboration with local business and tourist institutions.

“The capture of air traffic does not depend exclusively on the airport,” says Caballero. “The demand that the destination is capable of generating, and the guarantees that we can give to an airline that its flights will depart and arrive with a good occupation rate, are highly influential factors. Hence the importance of this working group, which has allowed us to join forces, take advantage of synergies within the competencies of each of its members, and draw up a common strategy.”

The airport also provides marketing support, with promotional events for new routes, as well as competitive airport charges, with incentives for the introduction of new routes and increased passenger numbers.

Last year alone, over 20 new routes were launched and Sevilla Airport surpassed five million passengers for the first time in its history. “All this has been part of a development that has allowed us to greatly diversify the number of operational airlines in our facilities, and also the markets for which we offer connections,” Caballero explains. “In 2011, only 30% of our passengers were flying from or to an international destination, while in 2017 that proportion was 46.6%. Because of this, we have gone beyond our strong dependence on the domestic market and achieved a more balanced traffic distribution, without any detrimental impact on our domestic services.”

Among the standout new routes in 2017 were Krakow and Warsaw – Sevilla’s first direct services to Poland. “On the other hand, Eastern Europe is one of the markets in the spotlight regarding ongoing growth,” Caballero adds. “The increase in connectivity with Germany and the UK was also very important, as these are two destinations with which there is a significant latent demand.”

The great challenge ahead of Sevilla Airport right now is the refurbishment of the terminal building and the repaving works for the runway, which have to be combined with its usual airport operations. “In this sense, our priority will be to ensure that the process is as comfortable and trouble-free as possible for passengers and airlines. We will also keep working on new routes and continue to improve the experience of our passengers,” Caballero concludes.
CONGRATULATIONS TO
ACI EUROPE BEST AIRPORT AWARDS
WINNERS FOR 2018

Tallinn Airport – under 5 million passengers

Bristol Airport & Seville Airport – 5-10 million passengers

Hamburg Airport – 10-25 million passengers

Rome Fiumicino Airport – over 25 million passengers

Amsterdam Airport Schiphol – Eco-Innovation Award

Pafos International Airport – Accessible Airport Award

Lene Beier-Simonsen Holling, HR Development Director at Copenhagen Airport – Human Resources Excellence Award

Oxera Consulting LLP – World Business Partners Recognition Award
Hermes Airports takes a holistic approach to accessibility across both Pafos and Larnaka airports. After Larnaka won the ACI EUROPE Accessible Airport Award in 2017, Pafos took the honour this year.

The awards judges highlighted services offered at Pafos with regard to border control and e-gates, available ‘accessible taxis’, and parking pay machines with easy accessibility.

“The lower height BorderXpress kiosks for automated border control were installed about two months ago and the initial feedback is very positive, with happy faces and encouraging comments to staff,” says Eleni Kaloyirou, CEO Hermes Airports. “We anticipate that this specific service will be most welcomed by passengers with reduced mobility, in the same way that the e-gates and the lower height pay-machines have been welcomed in the recent past. Step by step we are implementing a comprehensive and effective PRM strategy for both airports of Cyprus, and today I believe it is very easy for everyone to acknowledge Hermes’ holistic and targeted approach regarding its services offered for people with disabilities and reduced mobility.”

As part of its commitment to service excellence, and in alignment with international best practice, Hermes Airports will be introducing a ‘Changing Place’ at Pafos Airport by the end of 2018. Another is already operational at Larnaka Airport. “This specific facility is designed to provide sanitary accommodation, changing, washing and toilet amenities for people with multiple and complex disabilities. Both ‘Changing Places’ will be equipped with hoists and changing beds,” Kaloyirou explains.

Pafos was praised by the judges for actively involving persons with reduced mobility, and the organisations representing them, in the processes of improving its accessibility. A management and monitoring system has also been established, which assesses the quality of services offered to PRM passengers.

“Our PRM Department, and more specifically Sophie Christofidou, Terminal Services Manager, is leading an open channel of communication with the community and the organisations for people with disabilities and reduced mobility,” says Kaloyirou.

The emphasis is on building a relationship of trust and mutual respect, which has led to a better understanding of PRM needs and a much higher level of effectiveness regarding the services offered. “Our philosophy is very simple: ‘Today we are a provider, tomorrow we might be a user’. That is why we see PRM organisations not only as a stakeholder, but mainly as a vigorous partner, seeking their advice and strong involvement in making our airports a better place for people with reduced mobility.”

Kaloyirou adds, “Our PRM Department, and more specifically Sophie Christofidou, Terminal Services Manager, is leading an open channel of communication with the community and the organisations for people with disabilities and reduced mobility.”

A vision to operate best in class airports

Hermes Airports is hosting next year’s 29th ACI EUROPE General Assembly, Congress & Exhibition in Limassol from 25-27 June 2019. Attendees will experience the gateways of Larnaka and Pafos for themselves, while also getting a taste of Cyprus, the eastern-most point of Europe.

Kaloyirou explains that visitors will have the opportunity to enjoy the varied sights and attractions that Cyprus has to offer, such as archaeological sites and museums, medieval fortresses, beach resorts, age-old temples, cool mountain resorts, and much more. “Cyprus’ remarkably rich legacy in archaeological treasures and developed tourism infrastructure make the island one of the most attractive meeting places internationally.”

Indeed, the strategic development of Cyprus as a tourist destination saw Hermes Airports exceed 10 million passengers across its two airports for the first time in 2017 (7.7m at Larnaka and 2.5m at Pafos). 8% growth to almost 6 million was achieved in the first seven months of 2018, and the overall forecast for the year is 6.6% growth to 11 million.

Looking ahead, Kaloyirou says the focus is on providing an even better service to customers by operating innovative, safe and efficient airports in an environmentally-friendly and socially-responsible manner. “At the same time, our objective is to further increase traffic and connectivity, with more markets and new routes. Our vision is to operate best in class airports, offering a unique Cypriot sense of place and playing a leading role in the island’s economy.”
Sustainability is central to the Schiphol corporate strategy. "We truly believe that sustainable business is key for our license to operate," begins Denise Pronk, Programme Manager Corporate Responsibility, Royal Schiphol Group. "We are talking about a sustainable future for our society, here. We acknowledge that it is our responsibility to carry out our activities in a way that is well-considered and safe for our neighbours, the environment and our colleagues. It is not always easy to strike a balance while doing so, especially as the demand for aviation continues to grow. But in everything we do, we try to be as sustainable as possible."

Schiphol’s ambition to be the world’s most sustainable airport

These efforts were recognised at this year’s ACI EUROPE Best Airport Awards, where Amsterdam Airport Schiphol received the Eco-Innovation Award. The judges recognised the degree of innovation shown, for instance through the implementation of circular economy principles and the use of renewable energy. "Our ambition is to be the world’s most sustainable airport," says Pronk. "This is why we have embraced the circular economy. Taking a circular thinking approach enables us to integrate our green values with business insights even more effectively."

Examples of this include the lighting in Departure Lounge 2. Philips, Cofely and Schiphol joined forces, inspired by a shared vision they called ‘Light as a Service’. "We transferred ownership to the manufacturer as an incentive to innovate. By the way, they also pay the electricity bill," Pronk explains. "The fittings in this departure lounge were adapted to enable separate components to be replaced, effectively extending the lifecycle of the lighting by 75% and reduction of energy use by 50%.”

Schiphol has also opened a new morgue constructed entirely sustainably, according to the cradle-to-cradle principle. This means that, when the structure’s lifespan has ended, the materials can be easily reused in a new project. It is the first 100% cradle-to-cradle building at Schiphol.

The airport is also constantly seeking circular economy options while building its new pier, which is scheduled to open by the end of 2019. The facility will have 5,000sqm of solar panels.

Amsterdam Airport Schiphol is accredited at Level 3+ Neutrality of ACI’s Airport Carbon Accreditation. "We reach 4% energy efficiency each year through, for example, LED lighting, dynamic energy use and efficient air conditioning," Pronk comments. "Despite passenger growth, we have reduced our natural gas consumption by over 50% since 1990. This year we renovated Pier G and with the use of heat and cold storage we save 168,000m3 of gas per year, which is a reduction of 84%. The next renovation of Pier D will be even more: approximately 500,000m3 of gas can be saved annually."

Schiphol has also installed new wind turbines, and all power for the airport company will come from wind farms by 2020. Last April, the first wind farm opened, supplying around 20 GWh per year, which is comparable to the annual energy consumption of some 17,000 households.

Other initiatives include the introduction of 100 electric buses – the biggest zero-emissions bus fleet in Europe. This will increase to 258 electric buses by 2021 in the broader region.

Pronk asserts that Schiphol is about more than just planes – it is one of the biggest public transport hubs in The Netherlands. Indeed, thousands of passengers, commuters and employees will be taking green buses to and from Schiphol. “Schiphol Airport has helped drive this project forward with great enthusiasm and we are very happy that we have been able to contribute to it. Ultimately, we want Schiphol to be climate-neutral by 2040. This partnership with Connexxion and the Amsterdam Transport Region is a huge step towards this goal.”
Last year, Tallinn Airport completed its largest expansion project of recent years. Meticulous planning and extensive coordination between the stakeholders were at the heart of its strategy to ensure that the large-scale expansion and reconstruction of its airside area caused as little disruption to the daily operations of the airport as possible. Still, the airport experienced its busiest-ever year, with 2.65 million passengers – up 19% year-on-year. This was recognised by the judges at this year’s ACI EUROPE Best Airport Awards, where Tallinn Airport won in the ‘Under 5 million passengers’ category.

"Staying on schedule and on budget with such a complex task was a challenge unto itself, particularly since the project was co-funded by the EU Cohesion Fund," notes Piret Mürk-Dubout, CEO Tallinn Airport. "Each and every participant contributed towards these objectives, and it was extremely thorough planning and monitoring that kept the project on track throughout the process. Over 300 meetings were held during the two years, not including the daily briefing sessions between the supervisors and the builders."

A new state-of-the-art security screening checkpoint, doubling capacity at peak times, and improved airport access with construction of a direct tram line from the city centre, are just two highlights of the airport’s expansion project. The jury recognised the airport’s close cooperation with the airlines and other stakeholders, such as the Estonian Tourism Board, to promote Estonia as a tourist destination. Mürk-Dubout explains that, based on a recent survey, the aviation sector contributes approximately 2.6% to Estonia’s GDP. "We rely heavily on international teamwork throughout the aviation industry for reaching out to destination markets and airports of interest, in order to attract new airlines and promote challenging destinations. Tallinn Airport’s mission statement is very clear about our objective – to connect Estonia with the rest of the world."

Moreover, the airport’s commitment to mitigating its environmental impact was also highly commended by the judges. Some of the major ecological enhancements in 2017 included the instalment of new sewage and wastewater collection systems, establishing separate snow-melting areas, and a standalone engine testing area. A major upgrade from both an environmental and a safety perspective was the installation of a new runway lighting system with energy-efficient LED lighting.

"A sustainable and responsible attitude towards our environment is a value shared by everyone at Tallinn Airport," says Mürk-Dubout. "Aviation is an area that inevitably has a significant impact on the environmental condition and environmental safety. It is, therefore, important that we strive to mitigate the company’s environmental footprint and be as ecological as possible in our operations."

Exceeding the three million threshold

Tallinn Airport’s passenger numbers continue to grow at a healthy pace in 2018, rising by 16% in the first six months of the year. Indeed, double-digit growth is expected to continue for the remainder of 2018. "This brings us very close to exceeding the three million threshold already this year, which would be a first for Tallinn Airport," Mürk-Dubout comments. "Dealing with rapid growth rates has obviously been an exciting challenge, but last year’s success demonstrated that we are able to overcome operational issues without compromising the high customer service quality standards our passengers have grown to love us for. Not to mention the safety and efficiency of our operations, of course. Today we are better prepared for dealing with growing passenger flows, and Tallinn Airport is in the process of conducting a feasibility study to investigate options for the further expansion and development of the passenger terminal and the apron area."

Tallinn Airport’s award-winning strategy to “connect Estonia with the world”
An interview with Michael Eggenschwiler, CEO Hamburg Airport.

By Ross Falconer

Hamburg’s passion for passenger experience, environmental innovation and community engagement

This year’s ACI EUROPE Best Airport Award in the ‘10-25 million passengers’ category went to Hamburg Airport, which was recognised for its innovative additional services to increase the passenger experience and its commitment to the environment.

“The overall concept was definitely persuasive, because all the core areas feed into the jury’s decision,” says Michael Eggenschwiler, CEO Hamburg Airport.

“But, of course, specific projects were highlighted as representative of our last- ing commitment – for example, the new Community Prize, the expansion of the electric vehicle charging station network, and our commitment to the protection of communal bees. These are things we are very passionate about.”

The awards judges highlighted the innovative additional services to increase passenger experience introduced in 2017, such as sleeping capsules, and instant communication through social media channels.

Passenger needs are changing, especially as a result of digital transformation. “We see our task as recognising the wishes of various groups and developing appropriate product and service offerings,” Eggenschwiler comments. “Our surveys, for example, have shown us that 80% of passengers here at Hamburg Airport use a mobile communication device. So, we have communication channels that are optimally tuned for these people. Today, this naturally includes live communication with services like WhatsApp, as well as social media.”

Service and comfort play a major role, too. One of the most recent examples is the digital info touchscreens, which allow passengers to find the best way to wherever they want to go and then send the information to their smartphones.

Then there’s Service Gate Delivery,” Eggenschwiler adds. “Using their smartphones, passengers order snacks and drinks with ease, and they are then delivered direct to the waiting area at their departure gate. We are always open for innovative concepts. Take the sleep capsules, for example. Ultimately, it is the customers who decide whether a product or service lasts. The introduction of reusable cups underlines our commitment to being an environmentally responsible airport that is committed to detail.”

The ‘Mobility Concept 2020’ is an important building block for Hamburg Airport’s environmental strategy. Almost 50% of its vehicle fleet has already been converted to alternative fuels and power systems, and by 2020 the aim is to reach 100% for cars and 50% for trucks and commercial vehicles. Between 2009 and 2017, the airport reduced CO2 emissions from some 40,000 tonnes to 18,200 tonnes.

Hamburg Airport is accredited at Level 3 Optimisation of ACI’s Airport Carbon Accreditation, and is working towards Level 3+ Neutrality.

“In addition to the 100% conversion to alternative fuels and power systems, and the use of synthetic diesel, we are improving energy efficiency by such means as modern heating systems and new LED technology,” Eggenschwiler explains.

The awards judges also considered how the airport excels in its community relations. Having been at its present site for 107 years, Hamburg Airport is strongly rooted in the region. “The airport and the city have developed together, so it is a matter of course for us to place importance on being active in the community and taking on social responsibility,” says Eggenschwiler.

“We have a team that maintains dialogue with our neighbours and engages in project patronage and sponsorship. For 20 years, we have been publishing our own newspaper, containing everything worth knowing about the airport, and there is also a Neighbourhood Council. Last year, we launched the ‘Hamburg Airport. On the move. Community Prize.’ This award supports creative ideas and voluntary projects in the region – projects that are in need of support.”

Eggenschwiler adds that the ACI EUROPE Best Airport Award shows just how much value is placed on sustained and innovative commitment to the areas of environmental protection, customer service and community dialogue. “It is a special honour, of course. The prize is recognition and motivation for the efforts and achievements of everyone working at Hamburg Airport, and confirmation that we are on the right track here in Hamburg.”
Bristol recognised for customer experience, public transport improvements and special assistance initiatives

Bristol Airport was joint winner of this year’s ACI EUROPE Best Airport Award in the ‘5-10 million passengers category’. The awards judges recognised Bristol for its continued investments in infrastructure, staff training and increased public transport links. The airport was also selected for its new security search facility, which has improved the passenger experience at security control, allowing Bristol to achieve its highest ASQ score for all security indicators. The judges appreciated the airport’s commitment to facilitating the needs of passengers with reduced mobility, and its environmental strategy towards carbon neutrality, which it aims to achieve by 2030.

“It is a huge honour to be voted the best airport of our size in Europe by a panel of independent experts,” says Nigel Scott, Business Development Director, Bristol Airport. “This award is recognition of the hard work, passion and commitment of the team at Bristol Airport to delivering on our promise to passengers that ‘amazing journeys start here’. The judges were particularly impressed by our investment in facilities to enhance the customer experience, public transport improvements and special assistance initiatives such as becoming ‘autism friendly’. From the airlines which connect us with over 125 destinations around the world to our business partners who help to deliver a seamless customer experience, everyone in the Bristol Airport community can be proud of this achievement.”

Looking ahead, work has started on developing a new master plan setting out how the airport could serve around 20 million passengers a year by the mid-2040s. Bristol Airport handled a record 8.1 million passengers in 2017, an 8% increase on the previous year, and has built on that with further growth in 2018. The latest figures show that almost one million passengers were welcomed in August, making it the busiest month in the airport’s history. This took traffic during the summer to over 1.8 million – a 6.7% increase on 2017.

Oxera wins World Business Partner Recognition Award

The World Business Partner Recognition Award this year went to Oxera Consulting LLP, an ACI EUROPE member since January 2007. Its representatives play an active role in the ACI EUROPE Economics Committee. Oxera has also produced two independent studies, commissioned by ACI EUROPE. It was honoured for its solid expertise and advice to the airport industry, and for delivering high-quality studies with objectivity and comprehensive insight.

Oxera advises airports and the aviation sector globally, and this award is special recognition of the role it has played for ACI EUROPE over the past decade, and in particular its work over the last 12 months, including the report on the development of airport competition in Europe.

“I’m incredibly proud of the Oxera team’s contribution to ACI EUROPE over the past decade, and particularly the work we have carried out over the last 12 months on competition between, and regulation of, airports,” says Andrew Meaney, Partner and Head of Oxera’s Transport practice. “ACI EUROPE has proved to be a great partner to Oxera, valuing the integrity of our analysis and co-creating industry insight alongside us. We very much look forward to many more years of fruitful discussions on the industry’s policy debates.”
Rome Fiumicino wins ACI EUROPE Best Airport Award in ‘over 25m passengers’ category

This year’s ACI EUROPE Best Airport Award in the ‘over 25 million passengers’ category went to Rome Fiumicino.

The airport was praised by the judges for its smart terminal re-design and strong focus on the development of new markets and new routes. Indeed, this has contributed to strengthening the competitiveness of Rome as a tourist destination.

Rome Fiumicino also received recognition for its continued investments in infrastructure. Promotion of the local culture, and the use of technology to improve the passenger experience, similarly impressed the judges.

One of the services most appreciated by passengers is its e-gates. 36 electronic gates have been installed by Aeroporti di Roma to date, 16 of which are available in the departure terminals. In total, three million travellers benefited from automated border control in 2017. In the first four months of 2018, a further 30% increase was recorded compared with the previous year, meaning that, by December, approximately four million passengers will use the e-gates.

The airport attributes its success to what it calls the ‘Atlantia treatment’, initiated around four years ago, when Rome Fiumicino was bottom of the quality classifications. Indeed, it highlights several key improvements:

- Comfort and quality offered to passengers – cleanliness and decoration of terminals, speed of security and passport controls, quality of welcome in the terminals.
- The planning and creation of new infrastructure in accordance with the most advanced sustainability standards, and with no further consumption of land.
- The attention paid to developing new markets and new routes.
- Technological innovation applied to automating and supporting airport processes for both passengers and airlines.
- International promotion of local cultural organisations, through exhibitions, book presentations, and musical performances.

The ACI EUROPE Human Resources Excellence Award was created to recognise individuals who have demonstrated excellent leadership and human resources management among ACI EUROPE’s Regular Members. The objective of this annual award – now in its second year – is to give exposure to innovative examples that will help the airport community to better assess and implement the new procedures and skills needed to develop the industry’s workforce. This is increasingly important in view of the various challenges facing Human Resources Directors and airport leaders, such as mobility, succession planning, training, well-being and digitalisation.

This year’s Human Resources Excellence Award went to Lene Beier-Simonsen Holling, HR Development Director, Copenhagen Airport, for putting in place a clear strategy on engagement and employer branding that provides inspiration to the whole airport community. She was also praised for developing a solid programme to improve leadership and to create a cohesive and focused culture, which included a formidable use of gamification and technology.

Lene Beier-Simonsen Holling, HR Development Director, Copenhagen Airport, was presented with the ACI EUROPE Human Resources Excellence Award by Angela Gittens, Director General, ACI World.
An interview with Don Fertman, Chief Development Officer, Subway. By Marta Dimitrova

**Bringing customisation, innovation and localisation to airport F&B**

The last four months have marked a significant expansion for the Subway franchise brand, with new restaurant openings in Baiyun International and Ordos Ejin Horo airports in China, Pune International and Devi Ahilya Ba airports in India, Curacaoo International Airport, and Salalah International Airport in Oman. Another exciting highlight this summer is the new kiosk launch at Seattle-Tacoma International Airport, Subway’s highest volume airport shop to date.

The Subway brand has always provided for local options in its menus. Recently, it began work to drive an array of menu innovations that will be rolled out in the near future. As part of this effort, the brand is striving to develop a selection of truly local favourites that accurately reflect the personality of each locale.

In recent times, technology in the form of apps, remote ordering, and ease of ordering for quicker queuing, has been the topic of concessions conversation. Subway is meeting those needs with the introduction of some great new technology features, including its remote ordering kiosks. The kiosk, which is available in select locations so far, can be installed remotely and accessed by passengers or airport employees. The brand has also launched its reconfigured Subway smartphone app, which combines ease of use with the new Subway MyWay Rewards programme.

The ‘Make it What You Want’ mindset affirms that Subway understands that customisation has always been important for its guests. With its over 4.9 billion sandwich combinations and the upcoming regional menu choices, customisation will always be at the heart of the company.

With our exciting new Fresh Forward environment, flexible floor plan and array of ‘Make it What You Want’ sandwiches, wraps, flatbreads and salads, the Subway brand is delighted to bring our menu to airport venues around the globe,” says Don Fertman, Chief Development Officer, Subway. “For travellers, we have a fresh, customisable, portable product. For our franchise owners, we have a simple, lower cost operation. It’s a combination that works in virtually any transportation setting.

Furthermore, customer service and guest feedback are a vital part of strengthening the company’s business. “We recently took steps to transform the brand’s guest care process with the introduction of a new Guest Feedback Platform,” Fertman adds. “The new system captures guest feedback through simple online surveys and organises that feedback in the platform. This platform enables our franchise owners to quickly and easily access feedback in order to learn and respond to issues. The platform also helps to identify trends and opportunity areas to improve the overall guest experience.”

Social media also has crucial importance to the brand’s development. “We have put together a team of social media experts and listeners to facilitate customer engagement across all major social media platforms. By engaging and listening to our customers in real time, and within venues where they interact in their daily lives, we have a better feel for, and can more quickly respond to, our customers’ needs and ideas.”

Looking ahead, Subway will continue to strengthen its partnerships with the 250 airports that currently host one of its restaurants to ensure travellers and employees always have an exceptional guest experience. Meanwhile, the brand will also focus its attention on reaching its ultimate goal, which is to serve more passengers and airport employees in more terminals in more airports around the globe. “We believe that a Subway meal is the ultimate carry-on, because it is portable, delicious, familiar and, most importantly, trusted by passengers around the world,” Fertman concludes.
Blue Islands is one of only two scheduled airlines based in the Channel Islands. These are British Crown Dependencies, self-governing islands located in the English Channel, but not officially part of the UK. The airline splits its head office functions between Jersey and Guernsey and operates five year-round scheduled routes, plus one seasonal summer connection, and some charter flights. The most significant development in its recent history was the commencement of a franchise agreement with Flybe in June 2016.

Rob Veron has been CEO of Blue Islands since January 2011. In that time, he has overseen the introduction of the Flybe franchise agreement, the phasing-out of smaller Britten-Norman Trislander and Jetstream 31 aircraft, and a migration to an all ATR-based fleet. Nick Preston flew into Guernsey to meet with Veron and discuss the main challenges and opportunities facing his airline and Channel Islands air links, beginning with the benefits of signing up to become a Flybe franchise partner.

"It’s a 10-year agreement, explains Veron. “The rationale behind the franchise agreement is basically that we’re small, independent, Blue Islands, so not many people in the UK will have heard of us. In comparison, Flybe is Europe’s largest regional airline and its marketing bandwidth and capability in terms of attracting inbound passengers from the UK to Jersey and Guernsey is so much more significant than our own, given the size of our business. It’s a combination of that marketing capability, plus the benefits of using Flybe’s sales channels.”

“While you don’t necessarily see the brand Blue Islands on the face of the transaction any more, we are absolutely the operator, we still take all of the commercial risk,” continues Veron. “We pay a franchise fee to Flybe, but fundamentally we choose our routes, we choose our schedule, our frequency, our aircraft type, the whole operation is still very much Blue Islands Ltd, trading as a separate business, we’re just effectively selling through Flybe channels and paying them a percentage fee for doing so. We are entirely independent in terms of pricing. We actively compete with them. It’s 100% our commercial risk and reward. We seek permission from Flybe to deploy their brand assets on a particular route. We have a series of routes which we may operate under the Flybe brand, however that doesn’t prohibit us from operating any services that we may choose to under the Blue Islands brand. The franchise agreement is not entirely exclusive in that sense, but if we didn’t operate under the Flybe brand then we wouldn’t get the benefits in terms of the rationale for going into the franchise in the first place.”
The challenge of open skies

One recent development that could provide a new sort of challenge for the Blue Islands operation is the decision by the Guernsey authorities to introduce an open skies policy for flights between that island and the UK. This sort of arrangement already exists in the larger market of Jersey.

“Guernsey’s open skies arrangement officially commenced on 3 September,” says Veron. “Previously, any operator, be it cargo or passenger, needed to apply for a route license from the Guernsey Transport Licensing Authority (TLA) to operate a service between Guernsey and the UK or another Channel Island. This application would consider the existing market and, based on the proposal from the new operator, consider if the new entrant would affect the incumbent position, either directly or indirectly, by cannibalising the market from another route. If a route license was granted it could specify a minimum service provision, such as the aircraft capacity together with frequency of flights per day, week and year, which if not met could see the license revoked.

“Since it has a population of just 62,000, Guernsey is a sub-scale market, that as an island relies on secure air transport links for business, tourism, leisure, medical and sporting requirements. Route licensing was designed to ensure continual year-round services with enough capacity to both safeguard lifeline services for Islanders and support Guernsey’s tourism industry. It also provided operators with some limited protection against the possible arrival of predatory summer services by other airlines. Blue Islands has previously warned of the risk to the year-round viability of existing high-frequency services that Islanders rely on, from potential seasonal cherry-picking by new entrants operating only during the peak summer period.

“Since we will no longer be required to operate a fixed number of flights over a given period, Blue Islands will naturally review the viability of selected off-peak services by other airlines. Blue Islands has previously operated on a loss-making basis,” adds Veron. “Weaker performing rotations could be removed to optimise the schedule according to demand flows, which is a common industry practice. We remain committed to serving Channel Islands communities by offering lifeline air links at reasonable fares. Blue Islands will monitor the outcome of open skies to see if it results in any new operators entering the market and will actively compete on routes which remain commercially viable and where there is a need for Islanders.”

The open skies arrangement will cover all UK and Channel Island links from Guernsey, except for services to Alderney and Gatwick which remain protected under route licenses for the time being.

“The Gatwick link is an Aurigny monopoly,” says Veron. “It’s the largest route from the Island, the most likely to sustain a good level of competition and to deliver the benefits that competition would typically deliver, in a market that could sustain it, and it is being safeguarded. As an environment in terms of doing business and providing air services, Guernsey is a real challenge.”

Sustainable growth opportunities

Despite the challenges that lie ahead, Veron believes there is scope for future growth. “This summer we’re operating from Guernsey to Jersey, Southampton and Cardiff, and from Jersey to Southampton, Bristol and London City. We’re also doing some series charters to Zurich and Rotterdam, and we’re doing some ad-hoc ACMI work. Yes, we are looking at some other routes and we see potential for some small filler opportunities, including inbound leisure routes and some additional London capacity. There might potentially be some new European routes too. We’re just at the commercial conversation stage, so it’s something I can’t really expand on just yet. We are looking at route opportunities, but they’re not major markets as far as the Channel Islands go, they’re just what we think could be neat additions in terms of schedule optimisation, for routes where there could be some discrete demand.

“Blue Islands is a short-haul, high frequency regional turboprop operator. That’s what we do, that’s what we believe we do well. Over the last five years we’ve increased the size of our business by 75%, with annual passenger numbers up from 210,000 to 365,000, and we’re continuing to grow. It’s these small pieces of considered route development that keep us on our path. Small, considered, sustainable growth is the key for us.”
Remote screening increases flexibility at Tallinn Airport

The process of moving passengers through an airport needs to be secure, seamless, rapid and deliver a positive experience for travellers. Vanderlande cooperates closely with airports to achieve this and to provide the core components of the security process through innovative systems and intelligent software solutions.

“The use of remote screening offers multiple advantages to airports, such as increased flexibility when allocating resources,” says Mark Elliott, Director Products & Partners, Vanderlande. In 2017, the company installed a new security checkpoint solution – PAX OPTIMA – at Tallinn Airport. PAX OPTIMA’s advanced CIP (centralised image processing) software ensures that airports have increased flexibility when it comes to allocating their resources, as screening agents can share the workload to counter the effects of traffic variation. By simply adding more agents in the remote screening room, airports can reach higher throughput at the checkpoint without the need to open more lanes. Elliott explains that space constraints were one of the most challenging parameters at the airport. Through the additional integration of the spacing conveyor module, the lane footprints were significantly reduced while safeguarding high passenger flows.

To reduce manual baggage handling to a minimum – and optimise staff requirements – all lanes were equipped with an ‘empty tray recognition system’ for automatic tray stacking and returns.

“We congratulate Tallinn Airport on winning the ACI EUROPE Best Airport Award in the ‘Under 5 million passengers category’, and are very proud of the contribution we were able to make with PAX OPTIMA to the improved security procedures,” Elliott adds.

Gatwick partners with Bluecity to launch electric car sharing service

An electric car sharing service, the rollout of WeChat Pay and a new grab-and-go F&B service provide further evidence of the innovation that is rife across Europe’s airports. By Ryan Ghee

Gatwick Airport’s electric car sharing service is being rolled out in partnership with Bluecity.

Gatwick partners with Bluecity to launch electric car sharing service

In 2018, Gatwick partners with Bluecity to launch an electric car sharing service. The service is being rolled out in partnership with Bluecity, which operates a pan-London electric vehicle car sharing service with 100 cars currently available in total. Discussions are ongoing with local authorities and business groups about expanding the network further in London and in areas surrounding the airport.

Operating in a similar way to existing cycle schemes across London, 10 cars and charging points are currently available on Gatwick’s South Terminal forecourt. This is Bluecity’s first airport hub and discussions are in progress to increase capacity.

The new point-to-point service gives people using the airport a convenient, zero emissions travel option for getting directly on and off the airport. Customers are able to reserve a car in seconds via the Bluecity app. Local residents are also encouraged to use the service and Gatwick staff have been offered the opportunity to trial the service for free.
transactions are more than 70% of in China, where is very widely used by users, WeChat Pay than 800 million people. Nice Côte d’Azur fashion shops at duty free and duty free and WeChat Pay in 14 passengers. Transferring product available for quality of the and improve the and North America between Europe and immigration and customs facilities for transfer passengers to complete a one-stop flight connecting process within Pier 4. It also accommodates an additional access route for passengers bussed from other areas of the airport.

Lufthansa introduces ‘Delights to Go’ at Munich Airport

Dublin Airport has opened a new €16 million facility designed especially for transfer passengers. Built adjacent to Pier 4 close to Terminal 2, the new transfer area will greatly enhance Dublin Airport’s ability to compete for transfer traffic between Europe and North America and improve the quality of the product available for transferring passengers. The new building has the capacity to welcome four times more connecting passengers than is currently being handled, according to Dublin Airport’s Managing Director Vincent Harrison. “We have been growing Dublin Airport as a connecting gateway between Europe and North America steadily over the past five years and this new transfer facility will help us to further expand that business,” he says. The number of passengers transferring at Dublin Airport has increased from 550,000 in 2013 to almost 1.6 million passengers last year, and connecting passenger numbers are up a further 17% this year. The new three-storey facility comprises airline information desks, boarding card checkpoints, and immigration and customs facilities for transfer passengers to complete a one-stop flight connecting process within Pier 4. It also accommodates an additional access route for passengers bussed from other areas of the airport.

Lufthansa has introduced a grab-and-go F&B service at Munich Airport. The new catering option is being tested at the airport for six months. Centrally located in Terminal 2 near Gate G19, Lufthansa passengers with lounge access can now collect snacks and drinks in a dedicated self-service area. This offer is complimentary and can be accessed using a boarding pass at the entrance to the area. Using an interactive screen, guests can select one of three “connoisseur” boxes. The categories include Classic (including a tuna wrap or Greek salad, for instance), Balance (including a main such as a sprout sandwich with pear and fig mustard) or Local (including a Munich sausage salad, for example). These components are complemented by a sweet or savoury snack, a piece of fresh fruit and a small bottle of water. The offer is updated every two weeks. Each guest also has a choice between coffee, tea, water or a variety of juices. The meal is packed into a paper bag and passengers can immediately proceed to the departure gate to catch their flight. Lufthansa developed this quick refreshment option after conducting a field test at a Frankfurt Senator Lounge. The results showed that many lounge guests in a hurry wanted an efficient, time-saving catering option in the form of a to-go offer.

Chinese passengers offered WeChat Pay at Nice Côte d’Azur Airport

Chinese passengers offered WeChat Pay at Nice Côte d’Azur Airport conducted via mobile devices. “This solution is a perfect fit with our promise to offer passengers entering our shops a creative, expert service which offers a simplified and pleasant shopping experience,” says Anne-Gaëlle Normand, Director of Aeroboutique Shopping Operations at Lagardère Travel Retail France. With this new initiative, Lagardère Travel Retail France shares Nice Côte d’Azur Airport’s ambition to tailor the shopping experience for Chinese travellers by developing new, bespoke services. Chinese passengers also have access to a dedicated website via the airport’s free Wi-Fi, also available in Mandarin. The site gives them quick access to real-time flight information, transportation, information about VAT refunds and links to tourist sites. Other services for Chinese customers have also been rolled out in the departure lounges, such as a dedicated welcome booth is available in each terminal with an interactive Mandarin display point.

Dublin Airport eases transfers with new €16m facility

The new self-service catering option is being tested at Munich Airport for six months.
Isavia turns to technology to forge stronger bonds with visitors

By Paul Brugger, CEO BizTweet

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savia has found a new voice and a better way to keep in touch with international visitors when they journey through Keflavik Airport by making the information they need available to them instantly on their preferred social media channels.

Iceland has established itself as a desirable tourism destination and as a popular stop-over for journeys between Europe and North America.

The country’s airlines have contributed significantly to boosting visitor numbers through their route building and destination marketing, including attractive stop-over packages. And the appeal of the destination has encouraged many airlines from other markets, including Delta, easyJet, British Airways, Lufthansa, Norwegian, SAS and Wizz Air, to transport visitors to the island nation.

As a result, Keflavik International Airport has enjoyed dramatic growth, serving 8.75 million passengers in 2017, an increase of 28.3% over 2016. Keflavik operates year-round and 24 hours a day, serving 800 flights a week that carry travellers from 85 global destinations.

Isavia has supported this dramatic growth by improving its digital channels, helping travellers navigate their surroundings and enjoy the services available. A new, responsive and mobile-friendly Isavia and Keflavik website launched this year was complemented by real-time multi-lingual response to customer queries on Twitter and Facebook, powered by BizTweet personalised responses, powered by artificial intelligence.

"Isavia wishes to provide passengers with easy access to the information that they need when they need it and in the manner they prefer," Björn Öli Hauksson, Managing Director of Isavia, explains. "To do so, we want to use the latest and best technology. BizTweet has made this possible for us."

Establishing a dedicated social media team is a costly venture, and requires comprehensive training. Even the best social media teams can err by sending a message that doesn’t fit the brand tone or simply failing to reply in a timely manner. While there is an application for social media in marketing, customer service requires consistent, timely, and relevant response.

A benchmark study by Conversocial shows how difficult it can be – even for airlines with the largest social media teams on staff. North American airlines average 22.33% responsiveness with an average response window of 20 minutes. European and Middle Eastern carriers average 28.07% responsiveness with an average response window of 1 hour and 41 minutes.

Those metrics simply don’t work for transiting passengers who might miss a connection. Automating common social media queries, with artificial intelligence ensures passengers get accurate replies that are also personalised, timely and consistently within the brand tone.

A recent study by Capgemini shows that 69% of consumers were satisfied with AI-customer service response, and the top benefits that consumers recognise from AI assistants come from greater control over their interactions (63%), 24/7 availability of information (63%), faster resolution of support issues (45%), and less effort spent interacting with the company (35%). Additionally, 30% of consumers described brands that offer AI-enabled interactions as “more trustworthy” and 29% say it offers higher personalisation.

While personal service is welcome, sometimes the best response is a timely and relevant response; giving customers the answers they need when they need them, wherever they happen to be.
As we recover from the summer break and get back to business, it's important not to go back to ‘business as usual’ but instead take a moment to reflect on the current state of the industry and its ability to innovate and evolve.

Looking back on the year to date, the ACI EUROPE Airport Commercial & Retail Conference was dedicated to ‘transformational disruptors in the airport commercial space’, and the ACI EUROPE/World General Assembly focused on ‘airports as brands and businesses’. Bold themes indeed, at a critical time when the industry is experiencing the limits of the traditional airport business model, and is also increasingly being threatened from industry outsiders.

In fact, the ‘clear skies ahead’ mood resulting from expected traffic growth, which is driven mostly by LCCs, starkly contrasts with the already structural pressure on aeronautical revenues, and the potentially structural pressure on commercial revenues due to evolving consumer behaviour and digitalisation, already illustrated by the $67 billion travel retail market stagnation worldwide, except in Asia-Pacific.

So, what is an airport leader to do in the face of perilous pressure on both core revenue streams? The answer is simple and universal. Instead of bracing for change and hoping for the best, the only sensible option is to really embrace change and benefit from it.

Easier said than done? Not really. Let’s consider the commercial revenue stream and airport retail in particular, and use the Airport Retail Framework pictured, that highlights three evolutionary stages of airport retail thought and practice, characterised by the Traditional, Neo-Retail, and Consumer business models.

The framework uses a 7-step approach to address fundamental business questions, from the business model design to the existing airport key competences. It should be used to critically assess the status quo by ticking the boxes that best describe current airport retail practice, and thus to position it in the evolutionary scale. Naturally, the higher total sum will indicate the present evolutionary stage of the airport, but more importantly provide a playbook for change concerning the indispensable evolution of the airport business model.

So, beyond the tech vendor hype, the transformation buzzwords and insurmountable digitalisation, is traditional airport retail wrong? Not at all, but it clearly presents a case of summertime sadness, recalling a bygone time when everything was simpler, that simply does not adhere to reality anymore.

The traditional approach is not enough to push the commercial revenue stream, let alone maximise it, which is why the Traditional business model is now basic business. In addition to getting the basics right, airport retail has mounting challenges, as retail business already moved from tracking in-store footfall to driving engagement across the customer journey.

Indeed, Traditional airport retail may not be wrong, but it demands new layers of competences to create, deliver and capture value on today’s consumer and business context. And here lays a fundamental cultural shift in the airport frame-of-mind, from the conventional ‘build it and they will come’ approach, to the contemporary ‘customer base is the mother of all growth’.

For discovery purpose, now use the same 7-step approach to go beyond airport retail and critically address the overall business model that supports the current airport master plan. As one ponders on the solidity of one’s 30-year airport master plan, it is sensible to reflect on the risks and rewards of change by evoking how airports are essentially comparable to Amazon, for example, whose business model has recently led to $1 trillion market capitalisation, in just over two decades.

Although passenger traffic and the resulting aeronautical revenue will always be a key part of the customer base, it is fair to state that just like with airport retail, the contemporary airport business model is built on new layers of competences.

By embracing change and adhering to the new frame-of-mind, one may actually recover from diagnosed summertime sadness and envision exciting times ahead where airports still hold strong competitive advantages.

Airport retail: a case of summertime sadness?

By Nuno M. Brilha, Senior Associate for STRATEG Consulting
An interview with Paul Armstrong, Principal Solutions Architect, Amazon Web Services. By Marta Dimitrova

Utilising machine learning, AI and the cloud to deliver a more personalised customer experience

We’re going through a shift in technology that is unlike any other in our lifetime, and it’s happening at a startling pace – much faster than anybody anticipated,” says Paul Armstrong, Principal Solutions Architect, Amazon Web Services.

For over 12 years, Amazon Web Services (AWS), a dynamic, growing business unit within Amazon.com, has been one of the world’s most comprehensive and broadly adopted cloud platforms. AWS offers over 125 fully featured services from network analytics, machine learning and artificial intelligence (AI), to Internet of Things (IoT), virtual reality (VR) and augmented reality (AR).

Trusted by millions of customers around the world, from some of the fastest-growing start-ups, such as Deliveroo, Fan duel, and Monzo Bank, and major enterprises like BP and HSBC, to government agencies, AWS helps businesses to power their infrastructure, make them more agile and lower their costs.

“The AWS cloud allows companies and organisations to focus on what really differentiates them – such as analysing petabytes of data, delivering video content, building great mobile apps or even exploring Mars – and leaves the heavy lifting of the underlying technology infrastructure to AWS. Every imaginable business segment is using AWS in a very meaningful way,” Armstrong explains.

As a Principal Solutions Architect at AWS, Armstrong works with customers on their strategic initiatives to maximise their investment and innovation. “My aim is to help customers achieve their business goals, and I particularly look at how companies in this sector can leverage their data platforms to gain new business insights using the latest machine learning and artificial intelligence services.”

Indeed, AWS’ vision is that soon more and more businesses will move the majority of their applications to the cloud. “We’re just at the beginning of this trend. So, we are going to continue to listen to customers and then deliver what they need.”

AWS already works with a number of airlines to help them make this transition to the cloud. One such airline that has taken this trend on board is Ryanair, which will be shutting down the majority of its data centres over the next three years, as it gradually starts using AWS.

As passenger numbers continue to grow, managing large volumes of data is one of the main challenges facing the air transport industry. Utilising machine learning and AI expertise are significant differentiators in supporting the growth of the air transport industry, and combined with the scale and flexibility of the cloud it allows delivery of a more personalised customer experience.

Armstrong advises that: “To deliver a truly personalised travel experience, the first thing airports and airlines need to do is to extrapolate meaningful insights from all of this data to gain a deeper understanding of the customer’s journey, so that they can optimise the experience from start to finish.”

Moving their booking systems to the cloud provides another good opportunity for airports and airlines to improve the travel experience for customers, giving them the flexibility of scale, in order to deal with peaks in traffic and increased customer demands during busy periods. “WOW air, for example, has improved uptime and performance by moving its booking engine, development platforms and web servers to AWS, resulting in the ability to deal with significant increases in traffic during big promotional campaigns.”

As for the future, Armstrong believes that voice and vision capabilities, and the change from machine-centric interfaces, such as web and mobile, to human-centric interfaces connected to IoT devices, such as the Amazon Alexa-enabled device, will become the norm for all interactions with technology. Indeed, such technologies will drive the frictionless travel experience through the airport from arrival to departure, with personalised experiences at all points of the customer journey.

“Airports are in pursuit of delivering the best customer experience. Technology will become the new concierge, with natural, secure conversational interfaces becoming the expected norm. And computer vision, sensor fusion, and deep learning will be fundamental to reducing passenger wait times. It’s an exciting time to be involved in the industry, as customers recognise the importance of digital transformation and the need to continue to modernise and invest in new solutions.”
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