



August 2009 Edition

Message from the Director General

This week I presented airport views at the World Annual Chief Executives Forum, sponsored by the Singapore Aviation Academy and the Civil Aviation Authority of Singapore. Sharing the platform with representatives of other key sectors of our industry, including IATA, I stressed the need for all of us, as industry partners, to embrace change in a positive way and use the current crisis as an opportunity to focus on building new strengths not relying on old wisdoms.

We hear a lot about the pain of our airline customers, but airports are hurting too: declining revenues, inflexible costs to maintain and operate our infrastructure, heavy financial commitments, and the difficulty of adjusting current development plans. The ACI World Airport Traffic Report 2008, issued end July, clearly highlights the two faces of 2008, with a first semester of continued growth and the second ushering in a downward economic spiral. Only now do we see fledgling signs that the stranglehold is starting to ease. At the same time the H1N1 virus remains a wild card for future traffic in 2009.

So we must be nimble and responsive, keeping our sights focused on the long-term capacity needs. Airport managers know from experience that they are likely to see a spike in demand when this downward cycle truly bottoms out. That dictates our long-term perspective, and efforts must be made now, even as we continue to confront uncertainty.

Each effort will be all the more successful if made in collaboration with our industry partners and with government support. Whether in terms of safety management systems, global harmonization of security, training of personnel, implementation of 'common use' IT technologies, new generation airspace management programs, or the many environmental initiatives to reduce aviation's impact - the common theme is joint efforts that bring efficiency to all the players. We must demonstrate our shared commitment to quality of life for the communities we serve.

In that way, we will meet the challenges of today while preparing for tomorrow.

Angela Gittens
Director General
ACI World



ACI World at ICAO

Progress on Airport Safety Issues at ICAO

At the latest ICAO Aerodrome Design Working Group (ADWG) meeting held 13-16 July in Montreal, airport views were well represented by ACI staff members David Gamper (Geneva) and Paul Van den Eynden (Montreal), Bruno Maingon (Aéroports de Paris), and Wil MacMillan (Greater Toronto Airports Authority).

Two key issues for airports were reviewed with the following results:

1. Runway End Safety Area (RESA) specifications:

- ACI's proposal to maintain the present Standard, which requires 90 metres length, making a total of 150 metres when the end of the runway strip (60 m) is included, was accepted without change.
- The present recommended practice of 240 m (for an ICAO Code Number 3 or 4 runway) should remain a recommendation worldwide (even if some States may go further than this in their national legislation), since it would be difficult to implement on many existing runways
- However the RP is recognized as a good design standard for new airports (and new runways at existing airports).
- Wording to clarify the purpose of a RESA was added to the existing RESA definition: "by helping the aeroplane overrunning to stop on this area and/or by allowing the continuity of the landing of an aeroplane undershooting".
- New guidance material for airports unable to comply with the 240 meter recommendation was proposed, recommending an aeronautical study to identify potential need for additional risk mitigation and possible alternative solutions. The FAA's Engineered Materials Arrestor System (EMAS) is the only current specification for "a proven arrestor system", but other specifications are possible, under national regulations.

2. Review of Chapter 3 - Annex 14

The ADWG has requested that ACI lead a review of Chapter 3 of Annex 14 – Physical characteristics (of Aerodromes). A three-stage review process was agreed at the meeting, which would:

- Consider whether the Aerodrome Reference Code should be kept as is or changed (target completion Summer 2010)

- Set out the purposes of each airport characteristic/provision before trying to determine a specification. (target completion end 2010)
- Review the specifications, using papers offered previously to the review group and the wider ADWG. This process would follow the methodology proposed by ACI (target completion end 2011)

The extended timetable is due to the large scale of the work required. The next ADWG meeting will be held on 23-25 February 2010 in Paris, with a review group meeting in January. For more information about the results and future work of the ADWG meeting, please contact ACI World Director Safety David Gamper at dgamper@aci.aero

ICAO Publications for Airports

ICAO has partnered with ACI in a joint initiative to develop a List of Recommended ICAO Publications for Airports and Aerodromes. Please contact ngautier@aci.aero or MPeytchev@icao.int to obtain the list.

The intended use of this list is to serve as a guide to the responsible managers of the world's airports to place their annual orders for ICAO Publications.

This initiative is expected to assist ACI members and partners in making well-informed and more cost-effective purchase decisions, about the ICAO regulatory and technical publications required for their specialized activities. For complete information about ICAO's product and services, please visit the ICAO Online Store at: www.icao.int/store or contact MPeytchev@icao.int for further information.

ACI World at work with aviation partners

Update on two key initiatives:

1. Simplifying Passenger Travel Interest Group (SPTIG)/ 28th Meeting

The 28th Meeting of the Simplifying Passenger Travel Interest Group was held at the IATA offices in Geneva, Switzerland, 07-09 July 2009. ACI, as a key member of the SPT Board since its institution in 1999, actively participated in the sessions, providing the airport perspective, together with SPTIG airport members. Representatives from airports, airlines, control authorities and technology providers shared the latest developments in:

- Interoperability of Registered Traveler Programs
- Business Process Modelling of the Ideal Process Flow (IPF)
- US Global Entry Program
- EU Implementation of Automated Border Checks
- Advanced Passenger Information (API) and Passenger Name Record (PNR)

- One Stop Security (OSS)
- Mobile check-in

Regarding internal issues, it was considered that, the SPTIG has continually provided a high value-added platform for multi-organization dialogue, community networking, and research promoting, across its more than 10 years of existence. However, after the Ideal Process Flow (IPF) definition was completed, the group has encountered obstacles in finding the way to achieve end-to-end implementation. As a result, the group was asked to decide on SPTIG's future and the way to move forward.

At this report closing, the consultation is still in process. The results will be available at the beginning of September. Contact Arturo Garcia at agarcia@aci.aero for more information.

2. IATA Fast Travel Working Group Meeting in Geneva, 07-08 July 2009

The IATA Fast Travel Working Group latest meeting took place in Geneva, Switzerland, 07-08 July 2009. The Fast Travel Initiative, under the Simplifying the Business (StB) program, aims to extend self-service options for passengers through their entire journey. ACI is actively involved in this program, as the related systems and processes need to be implemented mainly at airports.

This year, IATA is pushing hard to draft and approve four Fast Travel Recommended Practices (RPs), to present at the Common-Use Self-Service Management Group (CUSS MG) next meeting, in Montreal, Canada, from 24th to 28th August 2009.

These 4 Recommended Practices are:

- Bags Ready to Go (covering common-use & self-service bag-drops and self-tagging)
- Document Scanning
- Self-Boarding
- Bag Recovery (CUSS kiosks for "lost & found" self-service)

ACI is exploring the options to adopt the Bags Ready to Go RP as a joint IATA/ACI RP, as it would add great value for both airports and airlines, following successful collaborative approach on the CUPPS and AIDX standards. To this end, the ACI World Airport IT Standing Committee (AITSC) and the ACI-NA Business Information Technology (BIT) Committee have been working intently, participating in the meetings and calls, reviewing the drafts, and providing feedback from the airport perspective. However, both groups still consider that it would be really helpful for the wide aviation community to have more time to understand the processes, requirements, and restrictions, and to put on the table a useful RP for everyone, showing real best practice, and providing the most efficient framework for stakeholders to collaborate locally.

Contact Arturo Garcia at agarcia@aci.aero for more information.

ACI Traffic News: World Airport Traffic Report 2008 now available

At the end of July, ACI published its annual report of traffic results for airports worldwide in 2008, including analysis, rankings, country by country and performance data airport by airport (600+ pages). This year, a record 1357 airports participated in the survey, providing the most authoritative and complete report to date.

ACI Director General Gittens comments in the preface to the WATR, "In 2008, airport performance was directly impacted by two key external factors. Volatile oil prices – a familiar dependency and vulnerability for our industry – haunted us throughout most of the year and in many instances pushed airlines to cut service and capacity. But it is the second – the meltdown of financial institutions and the economic turmoil that ensued with breath-taking speed – that depressed demand and rapidly contracted the business.

"Relatively strong performance in the first half of the year helped balance the heavy toll exacted by economic recession. The end result was a flat passenger traffic growth, with numbers of travellers rising just 0.1 percent above 2007, and more marked 4 percent dip in cargo traffic, reflecting a rise in shipping costs and the evaporation of demand in global markets."

Top-line figures include:

- Total worldwide passenger growth of +0.1% :
 - » Fastest growing region was the Middle East at 5.8% followed by Africa (+4.9%) and Latin America Caribbean (+2.1%);
 - » Asia Pacific and Europe grew by 1.2%;
 - » North America only region with decrease in traffic (-3.1%)
- Total aircraft movements handled by airports was 77 billion, a decrease of 2.1%
- Total cargo handled decreased by 3.7% to 86 million tonnes
- 51% of airports worldwide registered positive passenger growth in 2008, together these airports represent 49% of total passenger traffic
- 520 airports with more than 5 million passengers experienced a decrease in passengers compared to only 21 airports in 2007

The ACI Media Release with additional charts can be downloaded from the ACI Newsroom at www.aci.aero

The full report, which exists in both PDF and Excel formats, can be procured from the on-line Publications section of the www.aci.aero site. Caroline Knoepfel cknoepfel@aci.aero will be happy to assist you with any questions.

2008 AIRPORT TRAFFIC SUMMARY

ACI Stats by Region	Total Aircraft Movements	% Chg	Total Passengers	% Chg	Total Cargo	% Chg
Africa	2 734 308	3.0	148 472 213	4.9	2 126 122	5.7
Asia Pacific	11 225 784	2.5	1 163 899 072	1.2	29 068 256	(1.7)
Europe	20 900 662	(0.3)	1 509 352 088	1.2	17 516 425	(1.0)
Latin America-Caribbean	7 246 496	1.9	352 849 611	2.1	4 589 092	(4.2)
Middle East	1 636 053	4.5	152 590 727	5.8	4 267 979	1.6
North America	33 225 182	(6.0)	1 546 831 028	(3.1)	28 510 866	(8.4)
ACI total worldwide	76 968 485	(2.1)	4 873 994 739	0.1	86 078 739	(3.7)

PaxFlash and FreightFlashTraffic data for June**June results**

Global traffic in June 2009 was down by 5 percent compared to June 2008. Although markedly lower than June 2008, this is a clear improvement over the 8 percent growth slump recorded in May. Similarly for freight results, traffic was down worldwide by 13.5 percent. Although still starkly lower than June 2008, the gap with the previous year's growth has narrowed when compared to performance over the first six months, which was down on average by 18.8 percent. Asia Pacific airports report positive domestic freight traffic growth (+3.6%) and Middle Eastern airports led in the international results category (+1.9%).

First semester results

Overall results for the first 6 months of 2009 remain well below results for the same quarters in 2008 – when air travel and cargo services were climbing. But at the same time, airports see the declining passenger growth curve is softening. Even the sharp decline in freight traffic is stabilizing, as the charts at the end of this release illustrate.

Download the full media release www.aci.aero/newsroom with full tables and charts or contact Nancy Gautier at ngautier@aci.aero

**ACI Airport Service Quality Program Update**

ANA signs up for ASQ Performance and ASQ Assured

ACI is pleased to report that ANA (Aeroportos de Portugal) has signed up Lisbon, Faro, Porto and Ponta Delgada airports for both the ASQ Performance and ASQ Assured programmes. Funchal (Madeira) airport is also expected to join. The airports already participate in the ASQ Survey.

ACI Director General Gittens comments: "I am delighted with ANA's decision. I was in Porto earlier this year for the ASQ Award ceremony and I can attest to the strong commitment that ANA has to service excellence. I am delighted that ANA has now chosen to use the suite of ASQ tools to help it achieve this objective."

For more information of the ASQ Programme, visit <http://www.airportservicequality.aero/> or contact Craig Bradbrook at cbradbrook@aci.aero

ASQ Regional Forums

The regional ASQ Forums take place shortly in Calgary (26-28 August, 2009), Paris (9-11 September, 2009) and Singapore (23-25 September, 2009). The forum is organized annually in the regions for airports participating in the ASQ program and those interested in learning more about how the program is helping airports to improve customer service. There is no participation fee; delegates need only cover their travel and subsistence costs.

The program this year includes:

- ASQ Survey review
- Current trends in airport research
- Using the ASQ tools to improve service quality
- The impact of the financial crisis on passenger satisfaction levels
- Airport best practice presentations

The Forum also includes two new airport benchmarking studies on the 'Provision of IT Services to passengers' and 'Parking facilities'. These studies provide valuable insights into how airports are delivering these services, their pricing strategies and the customer satisfaction results.

More details on the program can be found and registrations can be made on-line at <http://www.airportservicequality.com/content/forumregistration.html>

Please note that closing dates for registration are:

- ASQ Americas Airport Forum (Calgary, 26-28 August, 2009) — closing date 14 August 2009
- ASQ Airport Forum Europe (Paris, 9-11 September, 2009) — closing date 28 August 2009
- ASQ Asia, Middle East and Africa Airport Forum (Singapore, 23-25 September, 2009) — closing date 11 September 2009

Global Training Hub

GTH in India for a Safety and Operational Workshop

In close cooperation with India's Indira Gandhi International Airport and GMR Hyderabad International Airport, ACI is offering an intensive and comprehensive program focusing on

regulatory requirements, best practices from other airports and practical hands-on exercises this week. Three back-to-back sessions have been organized, in order to enable 60 participants to take advantage of the six-day course. The course comprises 3 days of classroom training in combination with 3 days of practical exercises.

New expert teacher joins Airport Executive Leadership Program (AELP)

ACI has added Dr. Gregory Dale, Director of Mental Training and Leadership, Department of Duke Athletics, to its resource team for the autumn session of the AELP.

The ACI/Concordia University program runs from 14 Sept to 13 Nov, with two online sessions bracketing the classroom session at Jacksonville Airport Authority on 3-9 Oct.

Dale has recently completed extensive leadership counseling with the World Bank, Habitat for Humanity and an NFL football team, which recently won the Super Bowl. Joining the delivery team from Concordia, which includes professors from Greece and Germany, this session promises to be an exceptional international learning experience.

The AELP offers practical strategies to handle senior-level executive responsibilities in an effective manner and provides a forum for future networking among alumni. The online sessions of this course, which has been run successfully four times, counts 72 graduates from some 25 countries. Slots are still available in the course, which is limited to 25 participants. Don't miss the 10 August application deadline.

Upcoming training opportunities: check full list at www.gth.aero

ICAO – User Charges is back!

Following a successful June session in Geneva, ACI and ICAO have decided to schedule the next ICAO User Charges training in Port of Spain. The three-part course, covering the key elements of establishing and implementing user charges at airports, is delivered by experts from ICAO's Economic Policy and Infrastructure Management (EPM) Section of the Air Transport Bureau, ICAO Headquarters, Montreal.

Next Course: 07-11 September 2009

Location: Port of Spain, Trinidad

Cost: EUR 2'000.-

Airline Management for Airport Professionals

The principle objectives of this course are to provide a broad overview of the airline industry and to create awareness of the underlying marketing, financial, operational and competitive factors influencing airline viability. Participants will be shown how the sensitivity of airline profitability impacts airline management decisions and further analyze the principles of airline economics, costs and pricing. For more information on this course, please contact Nathalie at nzulau@aci.aero

Next Course: 07-11 September 2009

Location: Incheon

Cost: EUR 1'200.-

GTH ayuda a vencer el reto de la Planificación Aeroportuaria

Participantes en este programa podrán revisar anexos específicos de la OACI, estándares internacionales y prácticas recomendadas en el diseño aeroportuario. El programa está planeado para miembros del equipo de planificación aeroportuaria existente y para gerentes aeroportuarios con responsabilidades en planificación y desarrollo aeroportuarios. El programa básico de tres días provee una guía básica sobre el desarrollo del concepto de Planificación Aeroportuaria o Master Planning, así como medidas de desarrollo, evaluación y diseño para aeropuertos con mayor seguridad.

El programa revisa contenido específico del Manual de Referencia de desarrollo de Aeropuertos de IATA (IATA Airport Development Reference Manual), Anexos 14 y 17 de la OACI, así como el documento 30 de ECAC y EU300 (2008). Para más informaciones sobre el curso y las inscripciones, favor contactar a Natalie Zulauf a nzulauf@aci.aero

Fecha: 15-17 Setiembre 2009

Lugar: Ciudad de Panamá, Panamá

Precio: \$ 650.-

Become an Airport Safety Professional - three course offerings

1. Understanding ICAO Annex 14 - more information

Dates: 12-16 October 2009

Location: Incheon

Cost: €900

2. Emergency Planning and Crisis Management - more information

Dates: 19-23 October 2009

Location: Incheon

Cost: €900

3. Airport Safety Management Systems - more information

Dates: 26-30 October 2009

Location: Incheon

Cost: €900 (Note: This certificate course can be taken as an AMPAP Elective course, and in that case AMPAP pricing will apply.)

Calendar highlights: Two key ACI World Events



ACI Airport Business & Trinity Forum 2009

Don't miss this event, organized jointly by ACI World and "The Moodie Report" to provide a unique forum that brings together airports, concessionaires and brands from around the world. Hosted by CAM - Macau International Airport Company Limited, it will be held on 23-25 September 2009 in Macau at the Macau Tower. The program schedule and registration form, as well as full information about the preferred hotel MGM Grand, are available on the ACI website - click here - or you can contact Nathalie Zulauf, nzulauf@aci.aero, for assistance.



ACI World and ACI Asia Pacific Annual General Assemblies, Conference and Exhibition

ACI World and ACI Asia Pacific invite you to their joint annual conference in Kuala Lumpur on 2-4 November 2009, and sincerely thank Malaysia Airports for hosting this year's 19th ACI World Annual Assembly, Conference and Exhibition. The conference program topics and expert speakers will address the critical economic and business issues that airports must confront in these challenging times. Delegates will be treated to interactive panels and Q&A sessions that encourage them to share their experience and ideas on the dual challenge of managing current economic turbulence while keeping a clear vision of our industry's future needs. Full information is posted on the ACI website - click here - or you can contact Howard Baggott at hbaggott@aci.aero for queries and assistance.

Upcoming Regional Events

ACI North America Region, 18th Annual Conference & Exhibition, Austin, Texas, USA - 11-14 October 2009

For program details www.aci-na.org

ACI Latin America and Caribbean Region, Annual Assembly, Conference & Exhibition, Salvador de Bahia, Brazil - 15-18 November

For program details www.aci-lac.aero

ACI Europe Airport Exchange, Barcelona, Spain - 23-25 November

For program details www.aci-eu.org

ACI Africa, Annual Assembly & Conference - 8-9 December 2009, Harare, Zimbabwe

Following the recent nomination of Mr. Ali Tounsi as Regional Secretary for ACI Africa, the conference which was originally planned for September, has been re-scheduled in December. Programme information will be posted soon.

World Business Partners News



AVIATION DIALOGUE

This is a reminder that all WBPs are invited to contribute to the launch issue of the new WBP newsletter "AVIATION DIALOGUE". There is still time for you to submit your input for this first edition. And this is a perfect vehicle to share your expertise and knowledge with all ACI members.

PLEASE NOTE THAT AN ADDITIONAL TOPIC HAS BEEN ADDED FOR THE FIRST ISSUE!

The WBP Board has expanded the original scope which focused on the theme of SUSTAINABILITY to include articles on how airports can INCREASE NON -AERONAUTICAL REVENUE. With the ACI Trinity Forum fast-approaching, don't miss this opportunity to contribute.

Please send your submission to mbachelet@aci.aero by September 04, 2009. Please remember that our goal is to share business expertise, not to promote our individual products. So this should be non-sales material, written in English, with a maximum 1000 words.

Please visit www.wbp.aero for further details.



The Air Transport Action Group (ATAG) is organizing an **Aviation and Climate Change Communicators Workshop** in Amsterdam on Tuesday 8 September from 10:00 - 17:00 at the Radisson Blu Hotel (central Amsterdam) in conjunction with aviation organizations ACI, ASD-Europe, CANSO and IATA. With the COP 15 conference coming up in December, this session is intended to provide a forum for open discussion and understanding of how we can all better communicate the facts about aviation's impact, our targets and long-term aspirations. The workshop is open to aviation industry professionals (airlines, airports, manufacturers, air navigation services providers) working in the fields of communications, government relations and media relations. For full information please contact Anna Patient at ATAG by email patienta@atag.org or Nancy Gautier at ACI World ngautier@aci.aero

+++++