

ACI World AIRPORT DEVELOPMENT NEWS

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Focus on EUROPE

GREAT BRITAIN

Global Infrastructure Partners (GIP), the independent infrastructure fund manager, is selling its oldest airport asset, London City Airport (LCY). The price tag could be GBP 2 billion. London City Airport has confirmed that its owner GIP has indicated its intention to sell the airport. GIP has owned LCY for nine years and has improved it hugely during that time and now feels that it is the right time to sell. The news of the sale comes after LCY was refused planning permission by London Mayor Boris Johnson for its City Airport Development Programme.

GIP has not commented on the exact reason for the sale, but it could be that the company sees more long-term value in its other transport assets, e.g. London-Gatwick and Edinburgh Airport among others. - LCY is known for its easy access and quick processing, making it the airport of choice for executives in the financial City of London. However, its short single runway limits the type of aircraft that can use the airport and therefore – apart from a flight to New York-JFK – it serves mainly European destinations.

After almost three years of intensive study, **the long-awaited recommendations of the panel led by Sir Howard Davies, set up by Prime Minister David Cameron in 2012 to settle decades of political controversy over airport expansion in south-east England, were published on 1 July 2015.** The report by the Airports Commission confirms, on every ground, from cost to environment, from accessibility to ease of development, that **an expansion of Heathrow is best.** The Commission had shortlisted three options in 2013 on whether to expand Heathrow or Gatwick. There was also an option to build a completely new Thames Estuary airport. However, the latter proposal by London Mayor Boris Johnson was not even shortlisted. **The Commission now recommended a third runway at Heathrow, with a ban on night flights to address the impact the additional capacity would have on the environment and local communities, as the best way to boost Britain’s economy and secure the U.K.’s future in global aviation.** The third LHR runway is the most expensive and politically contentious of the three options, but would deliver the greatest benefits to the U.K.

At a cost of GBP 17.6 billion, a third runway could generate up to GBP 147 billion for the economy over 60 years and 70,000 new jobs by 2050, the report said. The Commission forecast that Heathrow’s passenger numbers could rise from 70 million in 2014 to more than 100 million by 2030 and exceed 130 million by 2050 as a result of the additional capacity. On the politically less contentious expansion of Gatwick, Sir Howard said that the proposal was ‘plausible’ but that a failure to expand Heathrow would put the U.K.’s aviation sector at risk of losing out to continental Europe. However, while expansion at Gatwick would also deliver improvements in the U.K.’s aviation capacity and connectivity, these would be more likely to be focused on short-haul and European links whereas the Heathrow expansion would mainly benefit long-haul traffic.

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The recommendations of the Airport Commission are likely to mark the beginning of months of political wrangling before the Government makes a final decision on airports in England's South East, in particular as David Cameron had pledged before the 2010 election not to back a third Heathrow runway. The plan to expand Heathrow is opposed by five ministers of Cameron's Cabinet whose constituencies would be affected. -- Transport secretary Patrick McLoughlin said a "clear direction on the Government's plans" can be expected by autumn 2015.

SWEDEN

Stockholm-Arlanda Airport has been selected, as one of ten airports in the world, by U.S. Customs and Border Protection (US CBP) to introduce U.S. preclearance and concrete discussions between Sweden and U.S. CBP will begin in order to ease connections between Sweden and the United States. About 650,000 people travelled between Sweden and the United States in 2014. Currently, five direct routes are offered between the two countries, and two more will start in the autumn. About half of the passengers between Sweden and the United States go via other European airports such as Amsterdam, London-Heathrow, and Frankfurt. U.S. preclearance will strengthen Stockholm Airport's role as the hub for aviation in Scandinavia. According to studies carried out by Swedavia, more than 70% of today's U.S. passengers support the introduction of U.S. preclearance. Above all they welcome the opportunity to be able to change to connecting flights more smoothly. **The construction process for the U.S. preclearance facility, which will be implemented in the lower level of the F-pier in Terminal 5, is estimated to take 1 - 1.5 years.** Prior to this, a more detailed discussion is required between Swedavia and the U.S. authorities regarding the design of the facility. The focus on U.S. preclearance is part of Swedavia's adopted decision to invest SEK 13 billion (USD 1.5 billion) in order to develop Stockholm-Arlanda.

Operations at Göteborg's City Airport are to be wound down after an in-depth analysis of the runway system has indicated that extensive measures are needed for the long-term development of the airport. Therefore, operator Swedavia has decided to acquire the remaining shares in the company that operates it and has adopted an approach to the gradual winding down of commercial flights. Since late November 2014, heavy passenger traffic at Göteborg City has been redirected to Göteborg-Landvetter Airport. In order for heavier passenger traffic to return to the airport, investment requirements for the runway system are estimated to be around EUR 26.3 million, Swedavia explains. At the same time, Swedavia has adopted an approach to the continued development of Göteborg-Landvetter in order to ensure the region's access. Karl Wistrand, Deputy CEO at Swedavia, says: "Unfortunately, there is no potential to develop Göteborg City Airport in a way that promotes the opportunity to travel to and from the West Götaland region. "It is therefore necessary to concentrate resources on Göteborg-Landvetter Airport in order to contribute to the region's continued development in the best way." Commercial airlines that have operations at Göteborg City (e.g. Ryanair, Wizz Air, and Gotlandsflyg) will be offered opportunities to set up operations at Göteborg Landvetter. In addition, dialogues will be initiated with the remaining operations, including general aviation and aviation of service to society, with the aim of finding long-term solutions. These operations will be able to use the infrastructure until further notice.

FINLAND

Helsinki Airport is investing heavily into improving its facilities and services. Starting from early 2016, its current terminal building will be extended. The airport's innovative approach to service development can ensure its permanent position as a top-rated hub for international travel in terms of comfort, design, and amenities. There have already been many changes under its large-scale development programme, launched in 2014. The biggest changes still lie ahead with the extension of the terminal. "Travel between Europe and Asia is expected to increase swiftly in the coming years. To strengthen Helsinki's position as one of the top junctions between Europe and Asia, we need to develop our services and operations even further", says Kari Savolainen, CEO of Finavia.

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The first phase of construction, slated to begin in 2016, will help increase capacity for transit passengers. There will be more stands for both wide- and narrow-bodied aircraft, and around a dozen new passenger bridges are to be added. Stage 2 plans include even more transit capacity and improvements to European and domestic services. The final phase will see the expansion of Terminal 2 so that check-in, security and baggage drop will take place in a single departure and arrivals hall. The extension work will begin by building an additional south wing to the airport's non-Schengen area. After completing the south wing during summer 2017, a brand new west wing will be built next to the south wing. The number of boarding bridges will be doubled. This enables a more seamless and comfortable travel experience, as the need for bus transfers decreases. The capacity of the luggage facilities will be increased as well. **The terminal extension is expected to complete by summer 2020.** Although the extension will bring nearly 50% more floor space to Helsinki Airport, distances will be kept short and services easily attainable. Finnish design will continue to be a key component of the airport's interior, particularly visible in material selections and service design.

"Helsinki Airport's biggest strengths are short layover times, friendly staff, short distances and world-class services. We will strive to hold on to these as we expand and prepare to welcome even more traffic. Finnish feel is what is unique to us, and all the development work will be done with this in mind," says Airport Director Ville Haapasaari from Finavia. New elements of Finnish design were already been introduced to the airport in 2015. Renowned Finnish designer Stefan Lindfors redesigned one of the airport's arrivals halls, bringing Finnish flora and fauna among the arriving passengers. The new Arctic bar features a roofless outdoor terrace, open year-round for passengers to experience the Finnish weather whether it is snowing, sleeting or the sun is shining. Introducing a Finnish innovation, GoSleep pod, to its passengers, Helsinki became the first in Europe to introduce such service at an airport. Along terminal extension, new services are being designed. In addition to shops and cafes, the development programme will introduce even more experiential services and new digital services in order to smoothen the journey. In the future, passengers can, for example, have the opportunity to order services such as freshly made coffee or jet lag massage, to their departure gates as they wait for boarding.

The terminal extension is part of Finavia's extensive EUR 900 million development programme, launched in the early 2014. As Helsinki Airport already is the leading transfer hub in Northern Europe, the development programme aims to strengthen that position and improve the passenger experience even further. By active development work, Helsinki Airport is preparing to serve 20 million yearly passengers by 2020.

GERMANY

The satellite of Munich Airport's Terminal 2 will officially open in April 2016, according to the Executive Committees of the joint operators, Munich Airport (FMG) and Lufthansa. Like Terminal 2, the satellite will be operated by the two partners, which will hold 60% and 40% stakes, respectively. The new facility will have 27 adjacent aircraft stands, allowing passengers to board flights directly and with no bus transfer. It will increase Munich Airport's annual handling capacity by 11 million passengers. "The satellite will take Munich Airport to a new dimension, both in quantitative and qualitative terms," says Dr Michael Kerkloh, the FMG President & CEO. "As a result, the outstanding passenger experience and service standards of our airport, recently highlighted by our selection as Europe's first five-star airport, will remain a key competitive advantage for our Bavarian hub in the future."

For Thomas Klühr, the Lufthansa Executive Board member in charge of passenger operations, finance and the Munich hub, the new passenger terminal is a milestone in the on-going development of the premium hub in Munich: "With the satellite, we will offer our passengers the ideal infrastructure with unique ambience. Terminal 2 is already among the world's best. Our guests in the satellite facility can expect the same. As an extension of Terminal 2, it is entirely geared to the needs of Lufthansa passengers."

As the first midfield terminal at a German airport, the new satellite has no public access. Check-in will take place in Terminal 2. Passengers will then proceed to passport screening and hand-

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baggage checks before boarding an underground personal transport system that will shuttle them to the satellite terminal in less than a minute. There they will find the full range of services and passenger-handling facilities as well as extensive shopping and dining options.

The transport system carrying passengers between Terminal 2 and the satellite will have three trains, each with four cars, to be delivered by the Canadian manufacturer Bombardier. They are designed to carry up to 9,000 passengers per hour in each direction and will take less than a minute for the trip. However, they will not be 'unwrapped' until the station is completed. The first test runs of the trains are scheduled for summer 2015. Over the coming months, workers will complete the interior finishes and install technical equipment in the satellite. Extensive testing of all processes can then begin in autumn 2015. This will leave time to implement any necessary improvements that were identified. Next, in 2016, hundreds of 'test passengers' will be recruited to help simulate the interaction of all handling processes in the new facility in an ORAT exercise.

Airport operator Fraport has confirmed that construction work on the third terminal at Frankfurt Airport will start in late 2015 and will be performed in phases over a seven-year period, with completion scheduled in 2022. The decision to go ahead comes after a comprehensive analysis of an audit study commissioned by the Hesse state government to assess the airport's future capacity requirements. During a meeting on 14 April 2015, Fraport's Supervisory Board also reconfirmed its decision to construct Terminal 3 (T3) in the southern part of the airport, after having thoroughly re-assessed all relevant traffic forecasts and expert studies regarding the new terminal and its future location. Commissioned by Fraport in September 2014, the expert studies forecast that passenger volumes at Frankfurt Airport will rise to between 68 million and 73 million passengers by the year 2021, exceeding the airport's current annual capacity of 64 million passengers.

In August 2014, Fraport attained planning permission for the construction of a main terminal building and two piers. These piers would contain 24 terminal docking positions after the first construction phase, and a total of 50 when fully completed. The plans showed that T3 would be linked to the existing terminals by expanding the airport's baggage conveyor and SkyLine peplemover systems.

Dr Stefan Schulte, Fraport's Executive Board Chairman, said: "We have thoroughly assessed and scrutinized all possible alternatives before deciding in favour of T3. We are very well aware of our responsibility to our shareholders, our customers, passengers and employees, as well as to the people living in the region. Frankfurt Airport is Germany's largest place of employment and serves as the gateway to the world for the state of Hesse and Germany as a whole. The new T3 will underscore this role and thus further strengthen our region. To accommodate the forecast traffic growth, it is now necessary to commence construction for the third terminal during the current year."

Dr Matthias Zieschang, Fraport's CFO, said: "**With an investment volume of between EUR 2.5 billion and 3 billion, T3 will be one of Germany's largest infrastructure projects.** Refraining from using a single general contractor for the entire terminal construction, Fraport will instead award multiple contracts to various companies performing specific tasks related to the project. This method already proved successful with the new Pier A-Plus at Terminal 1 that was inaugurated in 2012 on schedule and on budget. In addition, this method allows regional companies to offer their expertise and thus to benefit from the construction of the new terminal."

POLAND

Chopin Airport's first modern terminal has been redeveloped in a new form, following a major overhaul which made it bigger and more comfortable so that it can handle over 20 million passengers annually. The new extension has replaced the old building, famous for its distinctive violet-red roof colour, creating a single, functionally and architecturally coherent complex with the part of the terminal currently in use. The new seven-storey facility boasts 1,300 rooms and offices on 60,000 m² of space, housing 48 check-in desks and six self-service check-in kiosks in the departure hall, with the possibility to add more in the future. The newly redeveloped part of the terminal offers 15 new shops with a total area of nearly 3,000 m². The new outlets include such well-known luxury brands as

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Michael Kors, Ermenegildo Zegna, Emporio Armani, Salvatore Ferragamo, Burberry, and Ralph Lauren. As a novelty, there is also an airport Samsung Brand Store with the brand's latest products, one of the few such airport stores in the world, and an M&M children's clothes and toys shop. Passengers are also in for a big change when it comes to the food offer, with ten new bars and restaurants on 2,500 m², including the long-awaited fast-food outlets such as McDonald's. There are also three new cafes – Espressamente Illy, McCafé, and Bread & Co, the latter with an extended menu, and two spots for those who appreciate restaurant dining – The Flame and Misa. The modernized terminal has a food court area with three outlets serving a diverse menu from fast food to Italian and Polish cuisine. The outlets have a single payment system, making it easy for passengers to order meals. As another new addition improving the comfort of travellers, the new building provides direct access to the underground railway station, significantly shortening the time needed to get to the train.

"Investing in the development of the terminal is part of our thought-through business strategy for Chopin Airport. **Our long-term aim is to turn Warsaw into a major European aviation hub. We want to become Central Europe's leading airport handling over 20 million passengers per year.** I am confident this objective can be achieved and the opening of the new terminal is a first step towards that end," said Michał Kaczmarzyk, Director of Warsaw Chopin Airport. -- Modernization of the terminal cost nearly PLN 400 million, with PLN 91 million worth of funding provided by the European Union under Activity 6.3 of the Operational Programme 'Infrastructure and Environment 2007-2013'. The consortium of Hochtief Polska S.A. and Hochtief Solutions AG was the general contractor of the project.

FRANCE

Bordeaux Airport has confirmed its development strategy for low-cost airlines which account for more than 40% of total traffic at BOD. With 1.5 million passengers in 2014 and a growth of 14% already at the end of July 2015, low-cost traffic represents a key development segment. Keen on improving services offered to passengers and also for airlines, the airport carried out major work on its Billi terminal in winter 2014/15 following overcrowding during the 2014summer months. **In early June 2015, a 1,000-m² terminal extension opened, designed to receive arriving passengers, as were two extra-large lounges in the departures building. A new concept in bar/catering outlets, DELI&CIA, and a Relay shop opened on 19 June 2015.** DELI&CIA, managed by Elior, will propose a self-service offering of fresh products to take away or eat in a bright and colourful space with different ambiances to meet the desires of travellers. The new waiting area and redesigned duty-free areas will be operational in winter 2015/2016 so as not to disrupt the tourist high season.

The expansion work focused on three main objectives: Optimizing the capacities and terminal functions; Improving the passenger experience; Increasing the airport's commercial revenues. In line with the original concept for the Arrivals building, created from scratch in 2010, the new arrivals hall is 10 metres away from the old building. This area has been converted into a covered waiting area for people coming to meet passengers and has views of the runway. The building offers simpler, more straightforward navigation routes for arriving passengers, ensuring a friendlier welcome. The Departures building has been rearranged to accommodate two new departure lounges, adding to the existing four, without making structural changes or increasing the existing surface area. These lounges are larger, brighter, and will improve the comfort of those waiting to board. Inside the terminal, the emphasis is on comfort and hospitality. A new security checkpoint in addition to the existing two will facilitate access to the boarding area allowing faster clearance times.

The aim of the new shop and bars/restaurant design is to enable a more enjoyable retail experience, in keeping with the overall concept of the Billi terminal. Expansion and redevelopment of the retail space will be carried out in two stages, with an area increasing from 1,000 m² to 1,500 m². Finally, work on the new duty-free area, managed by Aelia, will begin in October 2015 to cause the least possible inconvenience to travellers during the tourist high season. These new offerings will be rolled out in early 2016, with preference given to walk-through shops and 'satellite' shops. – The total capacity of the extended terminal is 2.5 million passengers a year (BOD handled 4,952,111 passengers; +7.1% in 2014). The terminal has six aircraft stations and six pre-boarding

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lounges, i.e. 900 passengers can depart simultaneously. The facilities were designed and built by Dune Construction Group, the Dufon architecture agency, Secotrap, and Spie Sud-Ouest.

SPAIN

Construction has started of a new rail link between Barcelona-El Prat Airport and the city centre, which involves tunnelling beneath a live runway. Delayed by several years, the 4.5-km double-track link – 2.8 km of which will be excavated by TBM – will go beyond El Prat de Llobregat railway station, creating new stations at terminals T1 and T2. "Today, the beginning of the work is a reality," said Spain's Minister of Development, Ana Pastor. The EUR 268.4 million rail connection will put T1 within 19 minutes of Barcelona's Sants station and help cater for the growing number of passengers using the airport each year. The civil works, which were awarded to a joint venture of Copcisa, Ferrovial-Agroman and Sacyr, should be completed in 2018. The Spanish government is yet to award the systems and operating contracts.

PORTUGAL

Plans have been unveiled for the expansion of Faro Airport after the operators, Vinci Airports and ANA Aeroportos de Portugal, signed an agreement with construction firm Mota-Engil. Construction work will begin in October 2016 and will involve expanding the terminal from 81,200 m² to 93,120 m². This will include expanding and revitalizing the retail area, increasing security, modernizing the image of the terminal, and creating more operating and public areas. The EUR 32.8 million project is due for completion in March 2017. The operators hope that the expanded terminal capacity will increase the maximum number of passenger movements from 2,400 to 3,000 per hour. To accommodate the increased capacity, changes will also be made to the road network, carparks, lighting, walkways and landscaping. -- Faro Airport celebrated its 50th anniversary on 10 July 2015.

ITALY

Aeroporti di Roma (ADR) is embarking on an ambitious infrastructure plan, building on the successes of 2014 that included strong traffic growth (+6.4% to 43.6 million passengers), the entry of new carriers at Fiumicino, and the development of new routes. Traffic forecasts show growth to 100 million passengers at FCO by 2044 – the end of the ADR concession – during which some EUR 12 billion will be invested at the airport. **There are three main elements to the infrastructure plans:** • a terminal revitalization programme to increase the level of service and comfort for passengers in existing terminals; • the Fiumicino South Completion Plan to double the terminal surface area and upgrade the apron, taxiway systems, and all airport subsystems, including loading bridges, baggage systems and technical plants; • and the **Fiumicino North Master Plan to extend the current airport boundary to the north with a new terminal, new runways, real estate development, and links to Fiumicino South.**

These expansion plans, alongside new road and rail connections, are fundamental to achieving the increased passenger traffic expected at Fiumicino, which is the first airport in Italy to integrate the air and rail transport systems, with Aeroporti di Roma (ADR) and Trenitalia – Italy's state-owned main train operator – collaborating on a high-speed rail link that now connects Fiumicino with Bologna, Florence, and Venice. The intermodal project will soon extend the network to Naples.

The next key date is October 2016, when the Terminal 3 extension and new Boarding Area F at Fiumicino will be complete, adding a further 90,000 m² to cater for both Schengen and non-Schengen flights. Directly related to the terminal extension, new baggage systems for Terminal 1 and Terminal 3 will also be completed to increase capacity and technology standards. Attention will then turn to Terminal 1, where a new check-in hall and new Pier A will be completed in 2019. **A new Terminal 4 will be the final step in the Fiumicino South Completion Plan.** Further into the future, ADR's attention is already oriented towards Fiumicino North with a new terminal, new runways, real estate development, and links to Fiumicino South.

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Ciampino Airport is another fundamental asset for ADR, which delivered a new master plan to ENAC – the Italian Civil Aviation Authority – in July 2014. This includes the scope to reduce the number of flight movements, taking environmental constraints into account.

CROATIA

Prime Minister Zoran Milanović and the Managing Director of Zagreb Airport, Bruno Mazurkiewicz, have toured the construction site of the new terminal at the country's busiest airport in late July 2015, concluding that all work is advancing on schedule. By the end of the year, the steel roof and the exterior of the multimillion euro terminal building will be completed. "Things are going well. Permits for the terminal's use should be issued by the end of 2016, after which the testing phase should begin," Prime Minister Milanović said. **The EUR 243 million building is expected to open to the public in the first quarter of 2017.** The airport has officially set 4 March 2017 as the opening date of the new terminal. "It is important that we can now visualize the new terminal and that Zagreb will be home to a modern European airport," he added.

Some 1,000 construction workers are on site both day and night. The new terminal will stretch over 65,000 m², with the roof structure covering 35,000 m². The building will have eight air bridges, one of which will have the capacity to handle Boeing 747s and the Airbus A380. The boarding bridges will be supplied by the Barcelona-based manufacturer ADELTE (ex-TEAM). The new-generation apron-drive models supplied to Zagreb have two steel-sided sections and the most advanced docking technology, which includes 400-Hz ground power units. In addition, the French company ALSTEF was recently awarded a contract to design and install a new baggage-handling system.

Zagreb Airport's new terminal will have the capacity to handle 3.5 million passengers per year, compared with the current 2.4 million. The airport will later be expanded in subsequent phases to reach an annual capacity of 5 million passengers, though no firm timeframe has been set for future development. The project involves a total investment of EUR 331 million, EUR 243 million of which will be spent on the construction of the new terminal and EUR 88 million for the maintenance of the airport infrastructure over the entire period of the thirty-year concession, awarded to the French-led Zagreb Airport International Company (ZAIC).

SERBIA

The expansion of Terminal 2 at Belgrade's 'Nikola Tesla Airport' will begin in December 2015 and is scheduled for completion by August 2016. A contractor has already been chosen and the airport expects to be granted all necessary permits by November, in order for construction to begin a month later. The EUR 15.2 million project is said to be the airport's first Greenfield investment in years. The new terminal wing will be sphere-shaped and made of steel. Furthermore, it will feature a round roof and a glass exterior. "Along with the façade, a grand atrium will be constructed and the entire building will cover 11,000 m²", the airport's Managing Director, Saša Vlaisavljević, says. The new part of the terminal will also feature large commercial areas for shops and restaurants. Mr Vlaisavljević sees this as an opportunity for the airport to significantly boost its revenue. The new part of the two-level terminal will also feature passenger boarding bridges. Two common waiting lounges will be built, with the waiting room on the upper floor equipped with four boarding bridges (four parking position for single-aisle aircraft or two for widebody jets), while the second lounge on the ground floor will have four gates from which passengers will be bussed to remote stands. The upper level will be reached by both elevators and escalators.

"It is obvious that air traffic is booming in our country, and this trend is still on the rise", the Managing Director says, adding that the new terminal wing will boost capacity. ... We have to contemplate airport capacities at least several years ahead. Existing infrastructure capacities are sufficient for the current volume of traffic, but responsible business operation entails the timely preparation for expansion." -- The expansion of Terminal 2 and the on-going overhaul of Terminal 1 is part of a wider, EUR 40 million push to expand the airport's capacity by 35%.

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MONTENEGRO

Construction of Tivat Airport's new multimillion euro terminal is expected to begin in late 2015, if all necessary funds are secured on time. The country's busiest airport has stepped up talks with the European Bank for Reconstruction & Development (EBRD) for a EUR 20 million loan. The entire project, which comes at a price tag of EUR 40 million, includes construction of a new terminal with boarding bridges, an aircraft parking apron, and a carpark.

Tivat Airport has been facing capacity issues over the past few years. In 2014, it handled a record 910,533 passengers, the bulk of which came in July and August. It is now the former Yugoslavia's eighth busiest airport, ahead of Sarajevo and Podgorica. So far in 2015, it has seen its passenger growth average 1%. In a statement, the Montenegrin government said: "Passenger growth at Tivat Airport has exceeded even the most optimistic of forecasts and has pointed towards the necessity to implement this investment as soon as possible. It is important to note that several meetings have taken place with the EBRD and that an agreement in principle has been reached for the bank to approve this loan." The Government added that it is in the process of purchasing nearby land at Tivat Airport from the Montepanzo Bokaproduct Company in order to fulfill its investment plans.

The CEO of Airports of Montenegro, Milovan Djuričković, says the new terminal is of high priority for Montenegro and will help further develop its tourism industry. Tivat Airport's existing terminal was opened on 25 September 1971. It was damaged by a devastating earthquake in 1979 but was quickly repaired and expanded. In 2006, the terminal was again refurbished and developed. The apron has seven parking positions. In October 2014, the Serbia and Montenegro Air Traffic Services Agency (SMATSA), which controls the airspace of both countries, announced plans for a new control tower at Tivat, with construction to begin in September 2015. At the time, it was said the new facility would be opened in early 2016. The head of SMATSA, Radojica Rovčanin, had previously said that Tivat's new control tower will resolve all aircraft monitoring issues at the airport over the next two decades.

GREECE

The Government finally has agreed to sell concession rights to operate 14 regional airports for 40 years to Germany's Fraport AG and its regional partner, energy firm Copelouzos Group (through its Slentel Ltd subsidiary), as agreed in November 2014. However, the new leftist Government had halted the privatization deal earlier in 2015 and vowed to cancel the country's privatization programme altogether. The deal, which was published in the Government gazette overnight from 17 to 18 August 2015, needed to be made to qualify for bailout loans. The Fraport and Copelouzos consortium will be responsible for maintaining, operating, managing, upgrading, and developing the airports until 2055. The mainland airports include Aktio, Kavala, and Thessaloniki, while the remaining eleven are located on the islands, including Kos, Corfu, Crete, Rhodes, Santorini, and Zakynthos.

Fraport-Slentel has also committed itself to the realization of investments of EUR 1.4 billion at the 14 airports, with EUR 330 million invested in the first four years. Combined, these airports served a total of about 19.1 million passengers in 2013.

The EUR 1.23 billion offer by the German-Greek consortium has exceeded even the most optimistic estimates, as the nearest rival bid was EUR 600 million lower: French group Vinci, partnered with Athens-listed Ellaktor, offered a one-off price of EUR 870 million and an annual lease of EUR 17.9 million, while the bid by Corporación America (CASA) was even lower but still above the estimate by TAIPED, the Hellenic Republic Asset Development Fund. "The margin of difference was such that it was only a matter of minutes before the preferred bidder was chosen," a TAIPED official said. Fraport will control 65% of the new company, the Copelouzos Group 35%. The company will operate the terminals at the mainland airports of Aktio (PVK), Kavala (KVA) and Thessaloniki (SKG). The remaining eleven are located on the Greek islands of Corfu/Kerkyra (CFU), Crete/Chania (CHQ), Kefalonia (EFL), Kos (KGS), Mitilini (MJT), Mykonos (JMK), Rhodes (RHO), Samos (KGS), Santorini (JTR), Skiathos (JSI), and Zakynthos (ZTH). The remaining 35% will belong to the Kopelouzos group.

The founder and chairman of Copelouzos Group, Dimitris Copelouzos, stressed the project's importance at the local, national and international level: "Modernization of the airports will allow us, via reliable and

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safer transportation services, to further enhance Greek tourism continuously – thus empowering competitiveness of the local and national economies and generating new jobs. **Our goal is to create airport gateways that meet the growing needs and expectations of the Greek people as well as visitors from around the globe.**"

Greece ranks among the world's top ten countries in terms of the number of UNESCO World Heritage Sites. Tourism is a key sector of the Greek economy, accounting for about 18% of the country's GDP. According to the UN World Tourism Organization (UNWTO), the number of international tourists visiting Greece grew by 17% in the first half of 2014. This continues the strong performance of last year when Greece welcomed some 18 million international tourists (up 16%) who generated USD 16 billion for the economy (up 13%). The country is striving to exceed 20 million tourists per year – twice its population.

TURKEY

Construction of Istanbul's huge new airport started on 1 May 2015 after the General Directorate of State Airport Authority (DHMI) officially handed over the allocated area, two years after the tender call, amid protests over the potential environmental effects of the project. The CEO of the Istanbul Grand Airport company (İGA), Yusuf Akçayoğlu, said: "There is a misunderstanding in the public that we started construction earlier than this date. But the land was officially submitted by the DHMI to us as of May 1 this year and we have only just started our construction activities." DHMI Director-General Serdar Hüseyin Yıldırım has rejected claims that the airport's opening would be delayed amid financial complications caused by a depreciating lira and legal troubles surrounding the project. The new airport is expected to be operational in 2018 with one terminal and two runways. Construction work is to be completed in four phases. The first phase consists of the two runways and the main terminal, but **with the completion of all the four phases, the airport will include four terminals connected with a railway system, eight air traffic control towers, six runways, 16 taxiways, an airport hangar of 6.5 million m² with a capacity of 500 aircraft, and a capacity to handle 150 million passengers annually**, making it the world's largest airport. The airport will be connected to the Istanbul metro and multi-lane highways to facilitate access. The third airport is expected to take on 120,000 new employees once it is opened. -- İGA was established to co-ordinate construction of the new airport which is one of Turkey's most controversial projects in recent times for a number of reasons, from problems with the area's soil to the airport's potential environmental impact, as it is located in the Northern Forest Area, which experts say is of huge importance for Istanbul's ecological sustainability.

Other Regions

U.S.A.

New York's Governor Andrew Cuomo and U.S. Vice President Joe Biden have unveiled a USD 4 billion construction plan to fully redesign LaGuardia Airport in New York. By demolishing the existing Terminal B and replacing it with a single larger and structurally unified central terminal that will join with Delta Air Lines' terminals C and D, LGA will get expanded transport access, significantly increased taxiway space, and best-in-class passenger amenities. The trio of joined terminals would be moved closer to the Grand Central Parkway than the current structures are, creating more room for aircraft parking and runways, which could reduce the airport's chronic congestion. This new layout will also help to eliminate the on-going gate delays experienced at the airport.

In 2014, Biden had compared LaGuardia to something one might find "in a third-world country" and Cuomo said: "New York had an aggressive, can-do approach to big infrastructure in the past – and today, we're moving forward with that attitude once again. We are transforming LaGuardia into a globally-renowned, 21st-century airport that is worthy of the City and State of New York. It's the perfect metaphor for what we can achieve with the ambition and optimism and energy that made this the Empire State in the first place."

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Construction on the first half will begin upon final approval from the Board of Directors of the Port Authority of New York & New Jersey. That approval is expected in the first part of 2016; the majority of this first half of the project is expected to open to passengers in 2019, with full completion scheduled for approximately 18 months later, the Governor said.

Work will be performed by a consortium that includes airport operator Vantage Airport Group, construction firms Skanska and Walsh Construction, architects HOK and Parsons Brinckerhoff, and a global infrastructure investment fund by Vantage, Skanska and Meridiam. Delta will also carry out a series of improvement works to terminals C and D that will run alongside LGP's project. In addition to the unified terminal structure, the Governor's Airport Master Plan Advisory Panel made a number of other recommendations that will complement the new facility. This includes expanding ground transport access with the addition of an AirTrain terminal, improving the passenger experience with new terminal facilities, increasing storm resilience following lessons learned from super storm Sandy in 2012, and launching initiatives to support the surrounding community. Ed Bastian, President of Delta Air Lines, said: "Delta commends Governor Cuomo on his airport reconstruction plan, which will transform not only the New York City travel experience but also the landscape of the city itself. Delta has invested more than USD 2 billion in infrastructure upgrades and passenger enhancements at our hubs at LaGuardia and JFK airports, and the initiatives announced today are aligned with our on-going commitment to providing an exceptional experience for anyone traveling through New York for business or pleasure."

Port of Seattle officials are planning expansions over the next 20 years that could cost more than USD 10 billion to move people, luggage, cars, and aircraft through Sea-Tac Airport's congested space. Security lines are one of the airport's bottlenecks during peak traffic periods. The issue is not the runways, which the Port of Seattle expanded to three in 2008. Rather, the airport needs more gates, taxiways, and better ways to move people through the terminals and onto aircraft. **The Port is predicting that Sea-Tac will have to handle 66 million passengers per year by 2034.** "Our estimate at this time is we will need 35 additional gates to do that," said Mark Reis, Port of Seattle's Managing Director of the Aviation Division. In 2014, the airport handled 37.5 million passengers, and grew 7.5%. That translated into 88 aircraft operations per hour during peak periods, which is close to the 90 operations an hour that start to cause congestion, Reis said. By 2034, the traffic volume could rise to 120 operations per hour.

In addition to being the fastest-growing major airport in the U.S., Sea-Tac also is the most densely packed, with no room to expand externally. This means that airport planners must figure out how to fit more people and equipment through security, and off the ground. It also means that any airport development is a complex puzzle, requiring work be done in a precise sequence so it doesn't conflict with other projects and the flow of passengers through an already-crowded space. The airport's current density will likely continue to increase as the region's technology and aerospace economies drive people through Sea-Tac to destinations overseas and around North America. "Our job is to help facilitate the economy's need," Reis said. "The airport doesn't cause the economy to grow as it's growing, but the demands on the airport are very much a consequence of the vigorous economy the area is enjoying at this moment."

HONG KONG

Jack So Chak-kwong, Chairman of Airport Authority Hong Kong (AA), met with Li Jiaxiang, Director General of the Civil Aviation Administration of China (CAAC) in Beijing on 2 September 2015 to discuss the future of Hong Kong Airport. During the meeting, Mr Li commended Hong Kong International Airport's (HKIA) development into a world-class airport and air cargo centre for Asia, and added that **the CAAC fully supports HKIA's plan to expand into a three-runway system.** He also said the CAAC will proactively advance various initiatives concerning airspace management in the Pearl River Delta region. Mr So briefed Mr Li on the latest development at HKIA, including recent traffic figures and updates on important infrastructural developments. For the first seven months of the year, the airport welcomed nearly 40 million passengers and handled over 230,000 flight

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movements, representing year-on-year increases of 8.6% and 4.2%, respectively. Cargo volume rose to 2.4 million tonnes during the period. The AA chairman also told Mr Li that the construction of HKIA's three-runway system is expected to take eight years to complete. He added that the airport's existing two-runway system is likely to reach full capacity by 2016 or 2017, underscoring the pressing need for expansion. Mr So emphasized the importance of HKIA's extensive flight network connecting different parts of the world and Hong Kong's geographic position to the 'One Belt, One Road' development initiative, which consists of two main components, the land-based 'Silk Road Economic Belt' (SREB) and ocean-going 'Maritime Silk Road' (MSR). The strategy underlines China's push to take a bigger role in global affairs and which provides support particularly in the areas of funding and financing, trading, professional services, diversified tourism, and emerging industries.

PHILIPPINES

The GMR-Megawide consortium is bidding for the USD 2.4 billion contract to operate five airports under the PPP (public, private partnership) model. As many as six companies have shown an interest in the project so far. "These PPP projects involve development, operations, and maintenance of the five regional airports," a Government statement said, adding that the private partner would provide necessary improvements to the airport to enhance passenger safety, security and access. The five regional airports currently being offered under the PPP mode are Bacolod-ilay, Iloilo - Bundle 1; Davao, Laguindingan, and New Bohol (Panglao) - Bundle 2. The other prospective bidders for the five airports are Metro-Pacific-JG Summit Consortium, Aboitiz Equity Ventures, San Miguel Corp, Philippine Skylanders Inc., and Union Equities.

These PPP projects involve an estimated total cost of PHP 108.19 billion (USD 2.40 billion), a Government statement said. Besides, the PPP contracts expect private partners to provide additional facilities and improvements to enhance passenger safety, security and cargo movement efficiency as well as actively market the airports in order to develop direct international passenger traffic.

GMR-Megawide currently runs Mactan Cebu International Airport (MCIA), the first airport in the Philippines to be privatized under the administration's ambitious PPP programme aimed at modernizing key infrastructure assets. In the international competitive bidding process, GMR-Megawide Consortium had emerged as the highest bidder after offering a bid premium of PHP 14.4 billion (USD 305 million) for the airport, including a new Terminal 2, specifically developed to let the passengers enjoy the Cebuano experience the moment they set foot in the Philippines. The formal award of the project in April 2014 was followed by a six-month transition period to complete project formalities leading to the transfer of operations to GMR-Megawide on 1 November 2014. The project is expected to be complete by 2018. The contract to expand and modernize Mactan-Cebu Airport is for 25 years.

-- The Government plans to award 13 more PPP projects worth almost PHP 520 billion (mainly non-aviation) before President Benigno S. Aquino III steps down from office in May 2016.

INDIA

With all the required permissions and most of the land acquisition in place, pre-development work at the planned Navi Mumbai airport is slated to start from October 2015, about three months before announcement of the partner selected for development of the country's largest Greenfield project. The Government-controlled City & Industrial Development Corporation (CIDCO), the nodal agency for the international airport project, will hand over the supervision of pre-development work to the winning bidder by the end of 2015. CIDCO wants a closer co-ordination with the partner to develop the airport. The winning bidder will be handed over the supervision charges as soon as it comes on board to speed up the project and also to bring a greater co-ordination between the government agency and its partner. "CIDCO will hand over the supervision of the pre-development work or the role of project monitor to the winning bidder by December 2015/January 2016," an official said, adding: "Though we expect to announce the winning bidder by December, the partner is expected to complete its financial closure (raise the required funds for the project) only by June-July 2016."

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Pre-development work at the airport consists of diverting the Ulwe River to a canal, clearing, levelling and reclaiming marshy land, increasing the level of land from 0-2 m to 5 m above mean sea level, flattening of hillocks, and relocation of power lines. There is no timeframe for the completion of the pre-development work. -- CIDCO, which holds 26% stake in the project, is currently examining the request for qualification (RFQ) bids from four parties - GVK, GMR, a joint venture between Zürich Airport and Hiranandani Group, and a Tata Sons-led consortium.

SAUDI ARABIA

The new terminal at 'Prince Mohammad bin Abdul Aziz International Airport' in the holy city of Madinah (Medina) was officially opened on 2 July 2015 as a USD 1.2 billion gateway aimed at Muslim pilgrims, in the Kingdom's first airport privatization. The passenger terminal building covers an area of 155,000 m² and has 72 check-in counters, of which eight are for larger-size baggage, 24 for self-check-in services, 26 passport counters for departures and a similar number for arrivals. It also boasts a seating capacity of 4,000. The airport features 36 elevators, 28 escalators and 23 conveyor belts to facilitate and speed up movement of passengers and luggage inside the passenger terminal complex. In addition, the new airport comprises local and international shopping outlets, restaurants, and cafes, banks, and transport services, including buses and taxis. GACA President Suleiman al-Hamdan said six external terminals have been built over a total area of 10,000 m². These terminals are located close to the Hajj terminal to speed up procedures for arrivals and departures. According to him, this is the first facility in the world outside America to abide by the standards for energy use stipulated by the United States Green Building Council.

The total investment for the first phase is USD 1.2 billion, funded by the National Commercial Bank, Saudi British Bank, and Arab National Bank, under the supervision of the International Finance Authority, a member of the World Bank Group.

About 2 million pilgrims annually visit the holy cities of Makkah (Mecca) and Madinah for the hajj, which in 2015 takes place in September. Medina's domestic airport was upgraded to international status because of the importance and the role of the air transport sector in the service of pilgrims and visitors to the Prophet's mosque. The new terminal is part of the airport's first expansion phase which includes construction of a second terminal, a new passengers' lounge, a new commercial area and expansion of the existing second runway.

TIBAH Airports Development Co. won the bid and in October 2011 and signed a 'build, transfer and operate' agreement with the General Authority of Civil Aviation. The consortium includes Turkey's TAV Airports along with local firms Al-Rajhi and Saudi Oger. While the consortium will operate the airport for a period of 25 years, certain services such as security, immigration and customs services will remain exclusively under the Government's purview. TIBAH said **the project "represents the first partnership between the public and private sectors in airports" in Saudi Arabia**. Madinah Airport's annual passenger capacity will rise from 5.7 million in 2014 to 8 million, before doubling to 16 million by the end of the 25-year agreement for operating the facility, TAV said. The project represents a new direction because it was privately built and will be run by the joint venture, said GACA, which operates 27 airports in the Kingdom. Some of those are also privatization targets. Aéroports de Paris is among seven candidates invited to bid for a concession at the country's busiest airport in Jeddah. A new terminal under construction in Riyadh will also be operated by an international company, GACA said.

UGANDA

On 30 August 2015, President Yoweri Museveni performed a ground-breaking ceremony for the expansion projects at Entebbe International Airport (EBB) serving the capital Kampala. The expansion is expected to be completed in five years. Civil works will be undertaken in three phases, the first one financed with a concessional loan worth USD 200 million from the Chinese government, extended to Uganda through the Exim Bank. According to the Chinese Ambassador to Uganda, Zhao Yali, the Exim Bank has granted Uganda a loan repayment period of 20 years after a five-year grace period. Yali said **the contract for the expansion of Uganda's biggest airport has been awarded to**

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China Communication Construction Company, the firm currently building the Kampala – Entebbe Expressway.

Phase 1 involves construction of new passenger and cargo terminals and a multi-storey parking garage. Other areas will include the widening of the existing runway, building of aprons, and the improvement of navigation aids. President Museveni thanked the Government of China for extending the soft loan to Uganda that is going to be utilized to improve EBB. He commended the strong partnership that exists between China and Africa in general and Uganda in particular. The President strongly recommended that infrastructure projects use local inputs and called for utilizing local products of good quality in the building of infrastructure. "If local cement is of good quality for our economy, it should be purchased for such projects and if a skill is available and is of good quality, it should be used, he urged. The President said that the new Entebbe Airport will go a long way in rationalizing all issues concerning air cargo and passenger transport as well as eliminating dust and grass which are not necessary at the airport. The Minister of Works & Transport, Eng. John Byabagambi, observed that the start of the airport development projects heralds the transformation that the National Resistance Movement Government is advocating, as the expansion or development of key sector infrastructure boosts the national economy, creates employment, and positively impacts the standard of living of the people. -- In January 2015, the Civil Aviation Authority (CAA) had unveiled a plan to upgrade and expand the airport between 2016 and 2033. Passenger traffic at Entebbe has grown gradually to 1.3 million in 2014, up from about 1 million in 2010. Cargo handled increased to about 52,000 tonnes from 49,000 tonnes in the same period.

Green Airports

'Marco Polo Airport' in Venice has a unique approach to its environmental sustainability as it is located in an ecosystem unlike any other in the world. The gateway's strategy centres on the coexistence of the delicate environmental system and modern air transport technology. Located just 10 km from Venice's city centre on the shoreline of the marshy Venetian Lagoon, the airport, its operations – and the on-going development of its infrastructure – have consideration for the environment at the heart. "We are in what must be one of the most amazing environments in the world, and so we embrace our environmental commitment – we constantly try to push our limits in controlling and managing an airport development," said Davide Bassano, Environment Health Development Director at the Venice and Treviso airports.

Since the airport began its participation in ACI Airport Carbon Accreditation in 2012, it has made significant changes to its infrastructure, designed to cut carbon emissions in its operation. This has involved upgrading the cooling plant, replacing lighting with more efficient LED systems, implementing sensor-controls to optimize the illumination of the terminal building and the parking facilities, and modernizing the electrical equipment powering the luggage belts. The airport has recently reached a new milestone in its environmental sustainability, having attained Level 3+ Neutrality certification in ACI Airport Carbon Accreditation. The classification – the most advanced in the programme – recognizes the airport's efforts to offset its carbon emissions and achieve carbon neutral operations for all emissions over which it has control. After gaining Level 2, Reduction, in 2012, Venice Marco Polo Airport's improvement in managing its emissions took place at such a rate that its Level 3+ certification was attained much more rapidly than expected.

Minimizing the impact on its surrounding area is a key priority for Venice Marco Polo Airport.

Because of its unique setting on the Venetian Lagoon, among the most important aspects of its strategy for sustainability is the conscientious usage and recycling of water. The airport's water treatment plant, for example, delivers water directly back to the lagoon which means that, because of the fragile ecological balance, its treated output must contain even less pollutants than potable water.

Venice Airport is now continuing to work towards its ultimate goal – to cut its CO2 emissions further by reducing CO2 kilogram per passenger by 20% by 2020. The airport is currently in the midst of an airport-

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wide development programme, which by its completion in 2020 will have seen around EUR 500 million invested in the expansion and renovation of its facilities. The next phase of the development, Bassano explained, will take place over the next three to four years with the design stage now complete and the realization stage beginning. Intrinsic to the plans are infrastructural upgrades that will enhance environmental efficiency.

London Luton Airport in the UK has become one of the few airports worldwide to be accredited with Energy Management Standard (ISO50001) by BSI. ISO 50001 provides organizations with an internationally recognized framework for implementing an energy management system (EnMS), which helps them to internalize the policies, procedures, and tools to systematically track, analyse, and improve energy efficiency. The standard certifies that the airport is effectively managing energy use, reducing greenhouse gas emissions and working to meet environmental targets. The numerous energy saving projects initiated by the airport, such as use of LED lighting and PIR motion sensors, has led to reduction in the amount of carbon emission associated with electricity use by 342 t of CO₂ in the last CRC reporting year. London Luton Airport Health Safety & Environment senior manager, Simon Bown, said: "The achievement of these three certifications has taken years of dedicated work and the accreditation for energy management puts LLA amongst only a handful of Airport Operators in the world. We'll continue to work hard to reduce our environmental impact as the airport continues to grow in terms of passengers and new routes."

Miami International Airport (MIA), FL, plans to embark on a two-year energy-saving project in partnership with local utility company FPL Services. According to the airport, the sustainability project will be one of the largest energy-saving programmes ever to take place in Florida and the eastern US. Over the next two years, the project will install air conditioning, ventilation upgrades, water conservation retrofits, energy-efficient lighting, and other green initiatives that will save the airport more than USD 40 million in utility costs over the course of the 14-year agreement with FPL Services.

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