

AIRLINE BUSINESS DAILY

BRINGING YOU THE NEWS FROM THE ALTA LATIN AMERICAN AIRLINE LEADERS FORUM AT CANCUN – 2 DECEMBER

ALTA Daily sponsored
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ALTA slams scandalous Argentina airport deal

THE FINAL ACT OF THIS YEAR'S Forum saw ALTA, backed by IATA and Argentinian airline association JURCA, demand that Argentina's government throw out its proposed new contract with Aeropuertos Argentina 2000 (AA2000), the operator of Buenos Aires airport and 32 other airports across the country.

The airline associations say they will fight the contract and have not ruled out taking legal action against the government and AA2000 to have their deal rescinded.

The airline bodies are outraged at a deal struck between AA2000 and the government that will keep airport fees at their current high levels, guarantee a future rate of return of the airport group of 16% and open the door to new extra charges in addition to normal landing and passenger levies, says ALTA executive director Alex de Gunten.

ALTA and IATA estimate that airlines have overpaid some \$230 million in fees at AA2000's main airport of Buenos Aires since December 2001. As part of the

renegotiated agreement the associations wanted a 30% rates and fees discount to compensate for the overcharge, says de Gunten, but were shocked to see nothing of the kind.

The airlines were not consulted about the proposed new contract. "It was bad already," says



Alex de Gunten: Shocked by the Argentinian stand

de Gunten of the charging environment at AA2000, "but with the new arrangement we will be paying even more."

ALTA called for a new independent regulatory body to be created in Argentina to avoid "the abuses" that have occurred through the AA2000 monopoly. It also said that by refusing to consult with the airlines, the government and AA2000 had violated ICAO rules.

The airline bodies have launched a media campaign to highlight the situation in Argentina, and railed against "high and rising airport costs in the Latin American region", singling out Costa Rica, Ecuador and Mexico for particular criticism. ■



► Forum still makes a splash

Thunderstorms over the Gulf of Mexico last night brought the beach party indoors but that didn't dampen the enthusiasm of ALTA delegates.

Embraer's vice-president of marketing Orlando Neto and his wife Viviane took the opportunity of a break in the proceedings to make the most of the resort's facilities and like most others attending the third ALTA declared the event a success. Over the two days the Forum included more than 450 attendees, over 45 airlines from Latin America and the Caribbean, including 35 represented by their chief executives. The conference also included 10 directors of civil aviation from the region.

► ALTA BOARD IS ELECTED AGAIN

The ALTA AGM was held yesterday and this year's entire executive committee was re-elected for 2007. President Pedro Heilbron and vice-president Roberto Kriete will both serve a second term of office.



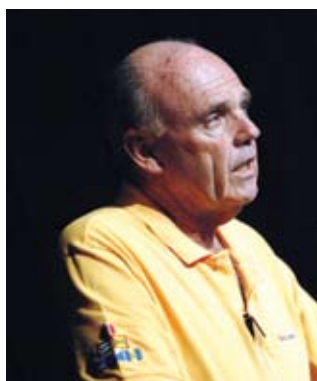
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Co-operation will help Caribbean beat instability

CO-OPERATION, PARTNERSHIPS, and allies – not governments – will be the keys to overcoming the inherent instability and weakness in the Caribbean mar-



Mike Conway: governments not the answer to instability

ket, agreed some leading airline executives in the region at yesterday's Forum.

Because traffic in the region is overwhelmingly local or O&D, carriers tend to rely on their local governments to cover losses, says Peter Davies, chief executive of Caribbean Airlines. "These subsidies though create a sense of complacency. The attitude becomes, 'Who cares? The government will pay to bail us out', instead of focusing on making the core product the best it can be" or looking for the relationships that will stimulate traffic.

And Mike Conway, the Air Jamaica chief executive, agreed that governments are not the answer. Air Jamaica is in the midst of privatisation after reverting to

government control two years ago. Conway's plan is to position Jamaica as an alternative gateway to Miami for travel to and through the Caribbean from both North and South America, and the UK.

Jamaica would be similar to the Copa hubbing operation at Panama City, Conway said. Miami's increasing bureaucratic barriers to easy transit such as US visa requirements and projected higher costs make it less desirable as an interchange point. He hopes to advance this strategy by developing relationships and partnerships with other airlines in the region that, like Air Jamaica, compete against America Airlines and other giants.

"The enemy of my enemy is my friend," he said. ■

► CARIBBEAN FLIES NEW LIVERY

The first Boeing 737 in the Caribbean Airlines fleet to be painted and outfitted in the new livery, complete with the hummingbird logo on the tail, has been delivered to Port of Spain.

"Caribbean Airlines is rooted in Trinidad and Tobago and the Caribbean, but its outlook is international: a Caribbean carrier with an international perspective. It is a pan-Caribbean airline serving the world", stated Peter Davies, chief executive.

More than competing for existing traffic in the region, Caribbean Airlines says it is interested in creating demand and becoming the number one carrier in the Caribbean.



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► inbrief

Alliances lead the way for consolidation says Cueto

In a fragmented market such as Latin America, alliances are a necessary precursor to consolidation, said Enrique Cueto, chief executive of Chile's LAN. Cueto said alliances are a first step in a region that is more highly fragmented than even Europe. "With 5% of world airline traffic and three airlines in each country, our industry needs a different level of consolidation," Cueto said. "I sincerely believe that in the next few years that this will happen. When this does, competition within the region on shorter flights will be fierce. Sooner or later though airlines will move beyond the alliance stage and into the exchange of stock and so on," Cueto said.

TAM feels impact of ATC

TAM Airlines' aircraft utilisation has fallen from 13 hours a day to about 11.5 hours since air traffic controllers in Brazil began a slowdown after the midair collision of a Gol flight with an executive jet in October, according to Paulo Castello Branco, director of TAM's institutional relations department.

New members for ALTA

Volaris, the Mexican start-up airline, was named as a new member of ALTA yesterday. The carrier which started operations with a fleet of new Airbus A320 aircraft in March this year was welcomed by ALTA executive director Alec de Gunten. "Mexico's airline industry is one of the fastest growing segments in the world and we are proud to have Volaris among the growing list of low fare international domestic and regional airline members of ALTA," de Gunten said. Two associate members, Accenture and Chevron, were also inducted to the Association.

Mexican airline market now oversupplied says Conesa

AEROMEXICO CHIEF EXECUTIVE Andres Conesa says: "if there's anywhere in the world that aviation has changed, it's in Mexico".

The two state-controlled major carriers, Aeromexico and Mexicana, were sold and the nation's airports were privatised, all in the last decade. But the rapid growth of new airlines in Mexico has led to "serious oversupply of demand".

On routes of 1.5 million or more annual passengers, where the ratio of supply to demand is now 8 times, compared to 4 in the US, while on the 10 busiest routes, the ratio is 1.8 times demand, compared to 1.2 in the

United States. And as a result, load factors are below break even points. Aeromexico has cut costs

dramatically, as has Mexicana, but new carriers keep starting up.

Enrique Beltranena, chief executive of Volaris, one of the most aggressive new players, says that the new entrants are "giving people what they want". Before Volaris began in March 2006, the nation's major carriers were experiencing compound annual growth rates of 2.1%; Volaris was able to stimulate new demand enough that it broke even by its second quarter. Beltranena says with the spirit of an evangelist, "I see a renewed spirit in our industry to have more players". ■



Andres Conesa

Romano: Hurdles to be cleared

WHILE LATIN AMERICAN traffic looks like it will remain at high demand levels, the industry has "structural hurdles that are a real impediment for greater and sustained passenger growth", said Mexicana boss Emilio Romano here yesterday. His question is: "Can the industry become structurally profitable?"

Airports, a constant topic here at ALTA, are part of the issue. According to Romano, airports collect \$4.2 billion in fees from airlines, "yet only a small part of

that money is reinvested". The region has a "perverse" airport privatisation process which advocates the highest bidder versus long-term business development. "The airline/airport equation is far from balanced," he said.

Romano is also suspicious of fuel pricing, particularly how crack rates are set, and he gets a feeling that refinery crack prices are not always market driven. There is also a "huge lack in transparency in Latin American fuel prices", with a disparity of almost

100% between the prices charged at some airports. Governments also see airlines as "cash cows", with some seeing the perfect tax policy penalising alcohol, tobacco and airlines too. On some short-haul routes taxes can represent up to 38% of the face value of an airline ticket, he added. ■



Abbey highlights growth potential

AMERICAN AND EUROPEAN operators will continue to "capitalise on local service deficiencies" and expand routes into Latin America warned Velocity Group partner Douglas Abbey.



Speaking at the ALTA Forum yesterday Abbey said that US and Canadian-based carriers have added 196 new routes (and 601 new flights) to the region over the past two years with more than 20% coming from Delta Air Lines. Latin carriers are targeting new services from secondary mar-

kets in response, he said. Velocity data shows that growth forecasts for secondary and interior markets outstrips growth figures for the rest of the world.

Abbey forecasts there will be increasing adoption of "hub-bypass" network strategies, that consolidation among carriers is inevitable and that regional jets (below 100 seats) will accelerate route experimentation. ■

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▶ TIME TO SLASH DISTRIBUTION COSTS

Latin carriers have the chance to radically cut their distribution costs, according to speakers at yesterday's forum. "There is something wrong in our business model in what we have been doing in Latin America," said Estuardo Ortiz, vice-president commercial, TACA (below).

Today ALTA members spend on average 15% of their revenues on distribution for an annual total of some \$2 billion, he said. This compares to 6.6% for US carriers. "There is a savings opportunity in the order of 10% of revenues," said Ortiz, which could amount to \$1 billion in annual savings if Latin carriers achieved a similar level.

In Latin America the Global Distribution Systems (GDS) have a dominant position, but the opportunity for change has arrived. "We as airlines have the ability more than we thought to changes things – the difference in cost is too big," said Ortiz. "I believe that the GDSs have to take a more proactive role to reduce distribution costs that looks into the best interests of the airlines to have low costs."

Carriers are working on an individual basis to restructure their distribution strategies, and at the ALTA level to explore "what sort of things we can do together to face this enormous challenge", said Ortiz.

For TACA, the first priority is to obtain better control over its product distribution. "We need to be innovative and creative to get people to buy direct," he said. Today TACA sells some 8% of its tickets online. "But the market is ready, we haven't been aggressive enough in targeting it," he said.

TACA is looking at establishing direct booking channels to travel agents, alternative distribution systems, web portals and call centres to boost sales that bypass the GDSs. It will roll out its first programmes next year, said Ortiz.



Sound of success



Marlene Lorca and Mike Miller get down to the sound

BOTELHO A WORTHY AWARD WINNER

THIS YEAR, BRAZIL AND THE world has been celebrating the 100th anniversary of the first flight at a public event by Brazilian Alberto Santos-Dumont.

With his imminent retirement next April as president and chief executive officer of Embraer, Mauricio Botelho must be seen as another Brazilian aviation hero, one who turned a small money-losing company into a vibrant world-

class aircraft manufacturer.

Botelho spent the first 15 years of his working career at Embraer before leaving to pursue other opportunities. When he returned in 1995, Embraer had been privatised and was embarking on production and delivery of its first regional jets, several years behind competitor Bombardier.

The Embraer ERJ-145 had its maiden flight just weeks before Botelho came on board. First delivery was in late 1996, and the company has never looked

back. Nearly 1,000 aircraft on the ERJ-145 platform have been delivered to 87 operators around the world. Additionally, the ERJ-145 program reached the 10 million flight hour milestone.

Under Botelho's leadership, Embraer has had a penchant for seizing market opportunities. It saw an unfilled market for aircraft seating 70-100 passengers and its four-model 170/190 program has won 731 orders to date from airlines around the world.

Embraer also used the platform to develop a surveillance, intelligence, and reconnaissance aircraft, the Legacy 600, and is now foraying into business jets, with the now raking in orders for the other business aircraft in development.

Botelho's "legacy" is a dynamic company, one of Brazil's leading exporters, relying in its employees and technology to produce top aircraft. ■



**Orlando Neto, Jackie Bloch,
Enrique Cueto, Constantino
de Oliveira Junior**



The sound of a conch horn brought ALTA delegates into the gala awards dinner on Thursday evening. The Federico Bloch Award winner was named as Embraer's Mauricio Botelho, and the company's vice-president of marketing for Latin America Orlando Neto collected the trophy from Federico's widow Jackie. The Rolim Amaro award for outstanding customer focus went to Panama's Tocumen airport.

TOCUMEN – A SHEAR DELIGHT

ENTER PANAMA CITY VIA THE Tocumen International Airport and the first thing a flyer may want to do is to leave, not because there's anything wrong with the airport but because its ambitious \$21 million renovation and expansion started in the departure area and is just now reaching the arrivals area.

If the departure area on the upper level is a sign of things to come, travellers won't re-

ally want to leave, because the shiny, airy, well lit area is on a par with the newest airports anywhere in the world. The area contains a number of very glitzy, upscale duty-free shops with name brands as well as a few interesting local outlets, but the outside improvements are as important as the inside. The project increases the airport capacity from 14 boarding bridges to 27, including six remote landing spots, and will add new elevators, luggage-handling and flight-information systems.

About three million passengers a year pass through Tocumen, and it had to grow as Copa, continues to grow. ■



Carlos García Molino, Alberto Fajerman and Ramón Real

Latin carriers fall short on IATA e-ticketing initiative

THE CLOCK IS TICKING ON A deadline in one of the industry's greatest cost-savings initiatives, electronic ticketing, but at least 11 carriers in Latin America and the Caribbean have not begun preparations to be ready for the 31 December 2007 end to paper ticketing.

IATA's regional director for the Americas Humberto Rivero said that under IATA's massive Simplifying the Business Initiative, paper tickets will become collec-

tors' items best suited for sale on eBay after the deadline. Any carrier that is not ready for the e-tix deadline will be forced to exit IATA's BSP system and settle payments for its own tickets worldwide, Rivero said. That will raise the per ticket costs from \$10 to between \$38 and \$45, he said. This region's carriers are now about 74% in compliance with the e-tix mandate, while North America is at 92% and the Middle East is at 13.2%, he said.

Electronic ticketing is just one of the elements of the IATA Simplifying the Business campaign, which he described as "the most important push in IATA's 60-year history". It also embraces e-freight, the use of RFID (radio frequency identification) for baggage management, standardised barcodes for passenger tickets, and common-use self-service passenger technology such as check-in kiosks. Cancun's newest airport terminal will have CUSS kiosks when it opens next spring, said Rivero. ■



► LUFTHANSA TECHNIK COST CUTTING

The name of the game for Lufthansa Technik is squeezing out costs from maintaining aircraft, engines and parts, said the company's chief executive August Wilhelm-Henningsen yesterday. "Cost reductions are crucial for airlines to stay competitive," he said.

Henningsen highlighted four examples of projects Lufthansa Technik has undertaken to cut costs. Over a 10-year period it has been working to escalate the time between maintenance checks on Lufthansa's Airbus A340s producing a saving of \$400,000 per aircraft per year. Another opportunity is the pooling of spares in rotatable material management programmes, he said, which takes place across the fleet of 1,226 aircraft the company currently manages.

In addition, Lufthansa Technik has developed the Advanced Recontouring Process for engine blades that repairs these parts rather than scrapping them. Finally, the simple procedure of water washing engines can improve fuel consumption, saving up to \$30,000 per engine per year, said Henningsen.



▶ MEXICANA EXPANDS SERVICES

MEXICANA'S EXPANSION IS SET to continue with the proposed launch of a nonstop daily service from Culiacan in northwest Mexico to Los Angeles and a new codeshare with Japan Airlines (JAL) for increased options between Tokyo and Mexico City.

The carrier says it intends to use aircraft from Airbus' A320 family or Boeing 757s on the route to L.A. Which has a tentative launch date of 2 January. This will be the only nonstop scheduled service on this city pair.

Meanwhile Mexicana and JAL have agreed to expand their current codeshare partnership from today increasing the travel options available to passengers travelling from Tokyo to Mexico City.

The new agreement covers JAL's twice-weekly round-trip flights between Tokyo and Mexico City routed via Vancouver, flights departing Tokyo for Vancouver five times a week also operated by JAL, as well as non-stop flights departing Vancouver for Mexico City five times a week operated by Mexicana.

Also, towards the end of March 2007, the airlines intend to start codesharing on flights operated by Mexicana that fly from Mexico City to Vancouver, and on flights departing Vancouver for Tokyo operated by JAL. At that time, JAL will be able to offer passengers travelling via Vancouver a daily round-trip service between Tokyo and Mexico City.

JAL and Mexicana first started codesharing in October 2005 on daily flights operated by Mexicana between Los Angeles and Mexico City, Cabos and Cancun. ■

▶ AVIANCA TO BOOST FLEET

Avianca will place a \$2.5 billion order for new single-aisle and wide-body aircraft by January, according to chairman German Efromovich.

Speaking at ALTA, Efromovich says discussions with both Airbus and Boeing are "very advanced" on an order to replace all its McDonnell Douglas MD-80s and Boeing 757s and 767s by 2014.

The Boeing 777 would be too big for Avianca and OceanAir route systems but the 787 would be "big enough," he notes. Avianca has no intention of replacing the 29 Fokker 100s it purchased from American Airlines, along with spares and tools, he adds. OceanAir will begin service three times a week in early 2007 from Sao Paulo to Lagos, on to Luanda, Angola, and back to Sao Paulo with a recently-purchased Boeing 767-300ER. A second 767 recently acquired is undergoing a C check and will be in the fleet in late February or March.



▶ AEROMEXICO PARENT IN \$10.9M PAYOUT

MEXICAN AIRLINE HOLDING company Consorcio Aeromexico is to pay \$10.9 million to Grupo Posadas in relation to a reduction in the sale price of Mexicana, which was sold to the hotel chain last December.

The agreement follows legal action taken earlier this year, in which the holding company sued the hotel chain for breach of contract over the privatisation of Mexicana and its low-cost subsidiary Click Mexicana. Aeromexico claimed that Grupo Posadas

– which agreed to purchase the two airlines last year for \$165.5 million – had later requested a reduction in the sale price, but had failed to provide the financial data necessary for the holding company to file an objection to the proposed adjustment.

Now in a statement to the Mexican stock exchange, Consorcio Aeromexico says: "After eight months of information analysis and various negotiations, a satisfactory agreement has been reached for both parties." ■

▶ SPEEDY SPIRIT FOR CARACAS ROUTING

SPIRIT AIRLINES HAS RECEIVED US DOT approval to launch service from its Fort Lauderdale, Florida hub to Caracas, Venezuela, less than a week after applying for rights to serve the city pair.

Under the regulator's action, the low-cost carrier is permitted to introduce nonstop flights seven times per week with Airbus A319 aircraft by April.

Caracas is the first destination for Spirit in the region. ■

▶ AEROCALIFORNIA TO RESUME US SERVICE

MEXICAN OPERATOR AEROCALIFORNIA is looking to reinstate service to the USA.

The carrier has asked the US DOT to renew its authority to serve Los Angeles from a multitude of Mexican cities. In April

the Mexican Government temporarily suspended Aerocalifornia's operating certificate over safety concerns. The carrier was cleared to resume service in August. It currently links points throughout Mexico's Baja California Penin-

sula with numerous Mexican destinations using a fleet of McDonnell Douglas DC-9 aircraft.

The carrier "intends to restore service at Los Angeles, California in the near future," it says in its filing to the DOT. ■

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In Latin America, TAM Linhas Aereas and Varig are all customers. Olivier Houri (*right*), president of Unisys Global Transportation, says. "We feel that it is extremely important to work with air transport industry groups in all regions because we share dialogue about ongoing industry issues. This ALTA conference is critical for Latin American airlines, and we enjoy looking for ways to help them address these issues using Unisys solutions and services."

Unisys has been working with the global transportation industry for nearly 50 years currently supporting more than 200 airlines and more than 600 airports worldwide. It is also a leading supplier of security solutions for air transport into and within the USA and focuses on three key areas – passenger services, airport solutions and logistics solutions. ■



▶ JEPPESEN HELPS FIND THE WAY TO PARTY – AND MORE

JEPPESEN SEES LATIN AMERICA AS AN important growth area for its range of services and is one of ALTA's sponsors this year. "We are very pleased to be a part of ALTA 2006 and sponsoring Friday night's beach party entertainment," says Jeppesen's Eric Anderson.

As part of its support Jeppesen has been showcasing its Electronic Flight Bag (EFB) and its operations management solutions specifically tailored for airlines. The company says it is the only company able to offer its customers a Total Mission Solution. ■



▶ LUFTHANSA SYSTEMS IS KEEN TO GROW IN LATAM

LUFTHANSA SYSTEMS IS AN ALTA SPONSOR and working with a number of members, including TACA, Mexicana, Avianca, LAN, Gol, and AeroRepublica. Its latest project is with TACA to optimise the company's core IT processes to achieve its operational and financial objectives.

The German company says it recognises that Latin American travel and tourism markets are stable with a continuous growth rate projected for the next few years. Aircraft orders from Latin American airlines are projected to reach almost \$100 billion through year 2024, it says.

"This heightened competitiveness in an extremely active market, coupled with greater consumer discretion and the ability to use the internet to compare flights, has made it especially critical for Latin American airlines to apply IT solutions that will give them the competitive edge and flexibility they require," says Lufthansa Systems' Sandra Hammer. ■

▶ AMADEUS HELPING TO MEET IATA DEADLINES

LAN AND AVIANCA ARE AMONG THE airlines that are using Amadeus' e-ticket solution to meet the IATA 100% e-ticket compliance deadline of 31 December 2007.

The ALTA sponsor has a wide-ranging IT portfolio including specific solutions for low-cost carriers, Amadeus E-Ticket Server, Amadeus Revenue Integrity and Amadeus Ticket Changer, an automatic ticket reissue tool.

"ALTA 2006 gave us an opportunity to reinforce our image and position in Latin America," says Christian von Thuemen, head of Latin America for Amadeus. "It is the only conference or show where such large numbers of airline CEOs are present." ■

▶ ON TRAX IN MADRID

ALTA exhibitor TRAX announced yesterday that Air Madrid Lineas Aereas is to use the company's maintenance and engineering software. Trax has offices in Miami and London.

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