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AIRLINE BUSINESS DAILY

BRINGING YOU THE NEWS FROM THE 13TH WORLD ROUTE DEVELOPMENT FORUM IN STOCKHOLM – 23 SEPT

Air Berlin continues its mega spending spree

If the deal goes ahead Air Berlin will become Germany's second biggest carrier

Fresh from its acquisitions of dba and LTU, Air Berlin has taken another major step towards consolidation in the German market by agreeing to take over Condor as part of a share-swap deal with Thomas Cook. If the deal goes ahead, Air Berlin will become Germany's second biggest carrier and will be propelled into the European top five.

Air Berlin will acquire a 75.1% stake in Condor directly from Thomas Cook in February 2009, subject to regulatory approval. At the same time, Thomas Cook will acquire the remaining 24.9% of Condor from Lufthansa, and will pass this stake on to Air Berlin in February 2010.

Condor operates a fleet of

35 aircraft, comprising 13 Airbus A320s, 13 Boeing 757-300s and nine Boeing 767-300s. The carrier's network includes a range of short- and long-haul destinations, which it operates from its Frankfurt base and Munich hub. Condor last year carried 7.8 million passengers.

LONG-HAUL: "This step makes sense, especially following the takeover of LTU, since it will enable us to offer our clients a more tightly-meshed long-haul flight network," says Air Berlin chief executive Joachim Hunold.

In addition to furthering the consolidation process in Germany, Air Berlin's latest move is a further example of



The Air Berlin – Condor team will create a strong German player

wider merger and acquisition activity occurring throughout the rest of Europe. A consortium led by British Airways and Texas Pacific Group is considering making a formal

bid for Iberia, while the Italian government is still seeking buyers interested in taking on Alitalia, and hopes to privatise the beleaguered carrier by the end of the year.

Movers and shakers hit Stockholm for first forum

One of the largest-ever gatherings of aviation industry experts will convene in Stockholm tomorrow (Monday) morning for the opening of the inaugural Routes Leaders' Forum.

More than 250 senior industry leaders representing airlines, airports, governmental authori-

ties, research bodies, banking and investment houses, aerospace industries and service providers will attend the forum to discuss key trends and challenges affecting air transport and to strengthen industry partnerships and co-operation.

A packed day's programme,

entitled 'Airlines and airports – towards a common vision' will focus on four major topics of the moment: EU/US Open Skies; the dynamic growth of China and India; aviation and the environment; and the imminent move of the low-cost carriers into the long-haul sector.

Commenting on the inaugural forum, chairman of Routes Mike Howarth said: "Routes is now in its 13th year and the Leaders Forum will provide it with an important new dimension. Although many of the air-

lines and airports at the event are in competition with each other, they are also in the same industry, sharing the same threats and opportunities.

"So while the network planners and the airport marketers meet and plan their new services at Routes itself, their CEOs and other industry decision makers will try to influence the industry framework as a whole, ensuring profitable and sustainable growth into the future." ■

Forum programme details see p28

▶ ROUTES | SUNDAY PROGRAMME

10.00	Tours
13.00	Registration opens/diary collection desk opens
13.00-19.30	Networking Village open
14.30-16.00	Industry briefings
17.30-19.30	Welcome reception (sponsored by Stockholm Arlanda airport)

ROUTES ADDS DEDICATED ZONE

In recognition of the growing importance of the cargo sector, the 13th Route Development Forum will have a dedicated Cargo Zone for the first time in the history of the event.

Twenty-three cargo operators will attend the Forum where industry behemoths UPS, TNT and FedEx will rub shoulders with freight carriers from Malaysia, China, Africa and the UAE, and East and Western Europe.

The UK arm of Russia's leading freight carrier, Volga Dnepr, is attending along with Volga Dnepr Group's two Russian subsidiaries, Ruslan International and AirBridgeCargo (ABC).

Launched in May 2004, ABC has become Russia's largest and fastest-growing international cargo airline.

The airline has five 747-800 freighters currently on order, with options for a further five. ABC will take delivery of the first 747-800s in 2010. The remaining four will be delivered 2011-2013.

The first of a 2006 order for two 747-400ER freighters was delivered this year. A third 747-400ERF will join the fleet in 2008.

The carrier launched services between Moscow, Tokyo and the airline's Siberian hub, Krasnoyarsk, in early September.

Next month, ABC will launch 747 freighter services between Amsterdam, Tel Aviv and Moscow.

The service linking Tel Aviv and Moscow aims to take advantage of the growing trade relationships between Israeli and Russian businesses, said the airline.

The new services complement existing network operations linking gateways in Asia (China and Japan) with Frankfurt, Amsterdam and Luxembourg via ABC's Moscow and Krasnoyarsk hubs.

In November, ABC will commence scheduled services between Asia and North America via Russia using cross-polar routes, starting with Houston in



Prestige goods being loaded by Qatar Airways

November 2007. ABC is mulling Montreal as its second North American destination. North American flights will be routed back to Siberia through Western Europe and Moscow.

"Using Russian airspace provides a unique opportunity to reduce journey times from Asia to America, thereby giving ABC a competitive advantage over the competition," said ABC director Denis Ilyin.

With eight 777Fs and 10 747-800Fs on order, and options on a further 10 747-800Fs, Emirates SkyCargo is also thinking big.

At the beginning of September, the carrier launched a weekly freight service between Hamburg and Dubai. "The weekly A310 freighter service will enable Emirates SkyCargo to meet the growing demand for cargo capacity to New York from shippers and freight forwarders in the Hamburg area," said Ram Menen, Emirates' divisional senior VP cargo (pictured left).

Earlier in the year, Emirates SkyCargo launched a Venice/

Dubai service to capitalise on Venice's strategic position as the portal for global trade and cargo operations of Italy's north-eastern regions, and those of neighbouring countries such as Austria, Slovenia and Croatia.

With India's air cargo growth expected to be 18-20% per annum and China's to be around 20-25%, Emirates SkyCargo said the carrier will continue to increase the choice of service it offers to and from the two countries. The Indian city of Ahmedabad will be added to Emirates SkyCargo's network later this year.

Another Gulf operator, Qatar Airways Cargo, is also focusing on expanded cargo operations as part of the airline's long-term growth strategy.

The addition of an A300-600F to Qatar Airways' cargo fleet in September has enabled the operator to add seven new cargo-only destinations to the network.

Services to Algiers and Tunis, Milan, Istanbul, Karachi, Colombo and Johor Bahru in Malaysia will supplement existing cargo-only operations to Amsterdam, Frankfurt, Khartoum, Dubai, Nairobi, Bangalore, Chennai, Lahore and Dhaka from Doha.



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Air France-KLM outlines dual hub benefits

Air France-KLM is touting the benefits to connecting passengers of its dual hub system at Amsterdam Schiphol and Paris Charles de Gaulle airports, as it moves closer to opening several new terminals at CDG.

Air France in June inaugurated S3, the new boarding satellite of Terminal 2E. S3 will be up and running by the end of this year and will have capacity for 8.5 million passengers annually. Terminal 2E, which had to be demolished and rebuilt following a partial collapse in 2004, will reopen in April 2008 and by late 2009 it will have 10 long-haul and seven medium-haul gates with capacity for 8.5 million passengers.

Terminal 2G, dedicated to Air France's regional traffic, will be inaugurated late next year with capacity for an additional three million annual passengers, while S4 – a second boarding satellite for 2E with capacity for 7.2 million passengers – is scheduled to open in 2012.

"Charles de Gaulle lacked capacity before, but the new facilities will make

it smoother and more comfortable, and we can at last offer the service that passengers expect," says Air France president Pierre-Henri Gourgeon. He adds that connecting traffic at the airport is "catching up with point-to-point", and the combination of the two hubs at CDG and Schiphol is "a way of stepping this up".

Air France-KLM chairman Jean-Cyril Spinetta believes CDG and Schiphol have an advantage in Europe because they still have room to grow. "When you consider the well-located airports in Europe – London, Amsterdam, Frankfurt, Paris and Munich – only two have strong potential for development: Paris and Amsterdam. Munich does also, but it has no critical mass," says Spinetta.

"When we started our merger discussions, some experts thought there would be difficulties in having two airports in competition. But we believed that if we were able to combine Paris and Amsterdam it would be a winning situation, and our analogies were sound," he adds.



Air France-KLM is using technology as a means of simplifying and speeding up the airport experience, and aims to increase the number of passengers using remote check-in services to three out of four by 2009 from the current one in three. The carriers introduced mobile telephone check-in in late June (see picture) for short- and medium-haul passengers, and will extend the feature throughout the entire network by the end of the year.

Gourgeon boasts that the improvements to CDG and its combination with Schiphol make the two airports "Europe's most attractive dual hub system".

Air France-KLM chairman Jean-Cyril Spinetta (centre) is shown how mobile phone check-in works during an Air France technology exhibition in Paris

To read the Airline Business blogs visit flightglobal.com/ab

Bmi focuses on BMed integration

UK carrier bmi is focusing on integrating 16 former BMed routes into its network rather than take advantage of Open Skies between the USA and Europe say the company's senior management. Bmi acquired the British Airways franchise, which operates a host of routes from London Heathrow to points in central Asia and the Middle East, in February for £30 million (\$38 million).

Chief executive Nigel Turner says bmi is on track to integrate BMed's operations on 28 October. On this date BMed's network, fleet and crews will be merged into bmi's operation and its London Heathrow-originating flights will switch to Terminal 1. Bmi will also take on around 700 of BMed's 750 employees.

On the network front, bmi is



"We felt that we were best concentrating our resources on other markets"

Nigel Turner
Chief executive Bmi

replacing BMed's former Alexandria link with a new Cairo service and is planning to start services to Tel Aviv in Israel next year. Bmi is also evaluating new Heathrow-originating links to central Asia, the Middle East, Iceland and Russia. Potential target destinations include Kiev, Minsk and St Petersburg in Eastern Europe; Kuwait, Sana'a, Damman, Doha and Abu Dhabi in the Middle East; as well as Lahore, Reykjavik and Istanbul.

Bmi deputy chief executive Tim Bye says BMed's order for five Airbus A321s has been retained and the initial aircraft from this order, which are due to arrive next spring, will be used to add two or three of these destinations.

Bmi is also in negotiations to acquire five additional A330-200s, which would take it to eight of the type. A pair of Swiss A330s are among those under evaluation, says Bye, but it is unclear whether bmi is still planning to add the A330s next spring as planned.

Turner says bmi has very little data on BMed's US transfer traffic through Heathrow, but once the integration is complete he says this might form an obvious basis for bmi to attack the US market.

As bmi defers its transatlantic debut from Heathrow, it risks repeating its experience in the Indian market where technical problems caused it to suspend and ultimately axe its Mumbai service. Turner says: "When you are out of the market, initially indefinitely, and as it transpired for three months, it becomes very difficult to go back into a market. We felt that we were best concentrating our resources on other markets."

Prague set for six of the best

BY GEOFF THOMAS

Six new gates equipped with boarding tunnels are extending the passenger clearance capacity of Prague's Ruzyn airport. The boarding tunnels will both increase the comfort of travellers and simplify boarding and leaving aircraft.

"The new boarding tunnels, which are our largest investment this year, will increase the attractiveness of Prague airport," said the airport's director general, Miroslav Dvorák.

He added: "The airport, which this year received a prestigious award – voted for by passengers – as the best airport in Central and Eastern Europe, has now gained another component of modern infrastructure, which will increase passenger comfort and enable us to manage the expected increase in operations next year."

The design of the tunnels is unique. The fixed parts of the tunnels are at two levels, each of which leads to a different floor of Terminal 2, the upper into departures and the lower into arrivals.

The large height difference between the departure and arrival levels is overcome by a slanted ramp, making the tunnels barrier-free, like the rest of the airport. The fixed section of each tunnel is connected to a common mobile part, which connects it directly with the aircraft.

Prague airport handles around 250 flights a day from 50 carriers operating to 103 destinations around the world. More than 1.2 million travellers used the airport in July 2007 alone, around the same number of people who live in Prague itself.

This year the airport authorities expects a record 11 million passengers, making Prague one of Europe's busiest airports with 16 flights a day leaving for London alone.

■ With the start of this winter's timetable, Prague airport is re-naming its terminals. Effective from 28 October, Prague Airport passenger terminals will be renamed, to avoid misunderstandings, as follows:

- Terminál Sever 1 / Terminal North 1 re-named Terminal 1 (T1)
- Terminál Sever 2 / Terminal North 2 re-named Terminal 2 (T2)
- Terminál Jih 2 / Terminal South 2 re-named Terminal 3 General Aviation (T3)
- Terminál Jih 1 / Terminal South 1 re-named Terminal 4 Military (T4)

Hong Kong ready to expand again

Fast growing Hong Kong International Airport (HKIA) is looking at further investment to ensure it retains its position as one of Asia's favourite international gateways.

Speaking at the recent Asian Aerospace Congress Eva Cheng, the Hong Kong government's transport and housing secretary, said the island's civil aviation infrastructure is being boosted by a \$1 billion investment, which will include a commitment to improving baggage handling facilities at Hong Kong Airport, a new hangar for China Aircraft Services, a widening of taxiways for the Airbus A380 and the possibility for a third airport terminal.

"We are looking at different ways to ensure Hong Kong remains the biggest international air freight handling centre and the fifth-busiest pas-

senger airport," says Cheng. "We are inviting tenders for a third cargo terminal by 2011 and a first study for a possible third runway is being implemented in 2008."

Only seven years after it opened, HKIA is already facing slot shortages on its current two runways at peak times. Airlines are lobbying authorities to allow increased aircraft movements at peak times to ease mounting congestion.

Speaking at Asian Aerospace, Hong Kong's Civil Aviation Department director general Norman Lo said the ceiling of 53 movements per hour will be raised gradually to ensure controllers and air traffic control systems are able to cope. In May the government announced a plan to boost hourly movements from 54 per hour to 58



"We're looking at different ways to ensure Hong Kong remains the biggest international air freight handling centre"

Eric Cheng
Hong Kong Gvt
transport and
housing secretary

per hour by 2009. HKIA is also attracting more airlines to its newly opened Terminal 2. Emirates, Jetstar Asia and Oasis Hong Kong Airlines were the first carriers to move to this terminal in June, with Bangkok Airways, Qatar Airways, Siem Reap Airways International and Thai Airways are scheduled to move in the next three months.

Yes minister...

Changi airport's new Terminal 3 will open for scheduled flight operations on 9 January 2008 and Singapore's Civil Aviation Authority (CAAS) is conducting trials of various airport systems to prepare T3 for its official opening. The country's minister for transport and second minister for foreign affairs, Raymond Lim, was recently pictured at T3 as he observed a simulation of a passenger departure flight. He saw the passenger check-in process, and also the baggage handling, immigration clearance and passenger flow systems. In all, CAAS has planned more than



50 trials over recent and coming months, involving more than 5,000 'passengers' including airport staff and other volunteers. Around 20 'real' flights will also test the new terminal's systems before January's deadline.

Idlewild 'Stixville' holds key in Big Apple battle

BY DAVID FIELD

American's \$1.3 billion terminal project at New York's original international airport, a once-neglected oceanside boondocks known as Idlewild, is the airline's newest weapon in the battle of the Big Apple.

The city and its metropolitan region, having recovered much of the damage they suffered when the 11 September 2001 terror attacks threw the financial services and dot.com industries into freefall, are back as the nation's largest and most desirable air-travel market. The city's three major airports and four major airlines are in a high stakes battle to dominate the city dubbed the Big Apple.

American, which has served Kennedy for more than 80 years and was based here until moving its headquarters to Texas in 1979, has always kept a presence here but in the last year has seen Delta Air Lines push deeper into JFK and the metropolitan area with a European build-up. Delta's build-up rivals the major growth over the last decade of Continental Airlines at Newark Liberty International Airport, on the New Jersey side of the city but



Gerard Arpey, chief executive of American Airlines (left) and New York Mayor Michael Bloomberg at the opening of JFK Terminal 4

also owned by the Port Authority of New York and New Jersey.

Continental's Newark hub is a domestic as well as an international operation and has gained favour among some New Yorkers with its relatively easy rail and rapid transit connections from midtown Manhattan. At JFK, JetBlue has become a major domestic player. Today, JetBlue dominates Kennedy, carrying more than one-fourth of the passengers coming and going through the airport.

But American's chief executive, Gerard Arpey, says, "We're not going to cede this market to anyone." He concedes that, "Our facilities here were pretty horri-

ble, but we had to change. Airlines have come and gone because they can't adapt to changes in the environment". Arpey said at the opening in late August that at one point American executives debated halting the terminal project as the airline's losses mounted and as bankruptcy loomed back in 2003. "But ultimately we decided to grit our teeth and keep going," he said. "I think it was the right thing to do".

The terminal is designed as part of American's campaign to capture high yielding business-flyers, says American sales chief David Cush. It has an enclosed check-in area for business and first-class passengers, which leads to an exclusive security checkpoint that, he hopes, will have shorter lines than the main security entrance.

The terminal also features two luxurious Admiral's Clubs, which have Internet access, playrooms for children, and even showers. Cush hopes that the spacious new digs will help bring in more New Yorkers as well.

The airline has been increasing its focus on the New York market in recent months, with new advertising and a heightened focus on New York business travellers. About two-thirds of JFK travellers start or end their flights here in the city.

Oxford plan to expand is academic...

Airport officials from England's third most visited city are at Routes with a goal of bringing their destination back on the timetables.

Oxford – just an hour to the west of London – is home to one of the world's most famous universities, a massive tourist and conference destination and an airport popular with local residents... it just doesn't have any scheduled passenger traffic.

"At one time we had the busiest single runway in the world with 160,000 movements a year. That has now dropped right down and with new owners and investment in the airport it is time to reverse the trend," says James Dillon-Godfray, head of the airport's marketing and development.

The airport will be familiar to many airline pilots as it is the home to Oxford Aviation's training centre but as more training flights have given way to simulators the airport is much quieter.

"We have had investment in the ILS and we are working on getting a railway link from the airport to London. We are hoping to talk to regional airlines who can see the advantage of developing routes to a quality destination with a business focus," Dillon-Godfray says.

The airport is currently open from 06.30 to 22.30 with availability from 06.00 to midnight if demand requires. The airport is currently used by business aviation.

"The new 1553m (5095ft) by 30m Marshall asphalt runway is fully grooved for enhanced friction characteristics in the wet and will essentially be much the same as that found at London City Airport (LCY) as a Code 2C runway, permitting access for a variety of regional airline types including the popular Dash-8, ATR and BAe 146 aircraft," says Dillon-Godfray. "Such types have already used Oxford in the past, either positioning privately, or for maintenance-related visits.



▶ **SLICES OF THE BIG APPLE:** In the New York metropolitan area, Continental Airlines carries the most passengers, but it has competition. Here are the numbers of passengers (in millions) carried in 2006 by leading airlines at JFK, LaGuardia and Newark liberty airports. Figures are rounded.

Airline	Domestic passengers	International passengers	Total
Continental	14.4	6.3	20.7
American	10.8	4.0	14.8
JetBlue	13.2	0.4	13.6
Delta	6.3	2.2	8.6
Continental Express	4.2	0.5	4.7
United	3.8	0.2	4.0
US Airways	2.7	0.1	2.7
Northwest	2.5	0.0	2.6
Comair	2.0	0.1	2.0
American Eagle	1.6	0.3	1.9
British Airways	0.0	1.6	1.6

Source: Port Authority of New York and New Jersey

► **AIRTRAN CUTS BAHAMAS LINK**

US airline AirTran pulled out of its only international destination on September 4. The regional no longer connects its Atlanta hub with Freeport, Bahamas.

"It's an economic decision, pure and simple", an airline spokeswoman said. "First, the aircraft utilisation is not as efficient internationally as the aircraft must spend time on the ground in both Atlanta and Bahamas for customs clearance. Aircraft do not generate revenue while parked on the tarmac."

The spokeswoman the Grand

Bahama Island Tourism board withdrew the financial inducements for offering the flight.

The daily flight was first offered in December 2000 and utilised a Boeing 737.

The aircraft used will be used for other routes, but the spokeswoman did not specify where.

"We do not have any plans right now for international serv-

ice additions but will be looking at opportunities to expand into that arena again in the future," she says.

Atlantic Southeast Airlines (ASA), Delta Air Lines and Freedom Airlines link Atlanta with the Bahamas with nonstop flights, according to Innovata. ASA flies to Freeport; Delta and Freedom flies to Nassau.

It's an economic decision, the aircraft utilisation is not as efficient internationally as the aircraft must spend time on the ground in both Atlanta and Bahamas for customs clearance. Aircraft do not generate revenue while parked on the tarmac

► **MAS UNVEILS NEW CHANGES TO INT'L NETWORK**

Malaysia Airlines (MAS) is to launch new services to Lahore in Pakistan but will drop services to Nagoya in Japan and Zurich in Switzerland.

MAS says in a statement that the changes will take place in the winter operating season that starts on 28 October. It says Lahore will be added as a new destination on 7 January while services to Nagoya will be suspended on 5 January and services to Zurich will be dropped on 24 January.

Lahore will be served three times per week as a link to existing Kuala Lumpur-Karachi services. Kuala Lumpur-Nagoya services are currently operated four times per week while Kuala Lumpur-Zurich services are operated three times per week.

MAS has been restructuring its operations over the past two years in a bid to be consistently profitable and initiatives have included a wide-ranging overhaul of its domestic and international route networks.

New route to connect Brussels with Ljubljana planned



► **inbrief**

► **BRUSSELS AIRLINES TO ADD SLOVENIAN LINK**

Brussels Airlines is to add a new route connecting the Belgian capital with Ljubljana in Slovenia. It will begin direct services on the route on 19 November, offering six weekly frequencies between the two capitals. Brussels Airlines says: "The country is enjoying a prosperous economic development, and its economic levels are on line with the EU convergence levels; it in fact recently introduced the euro. This is a great boom to the country as well as to the tourism industry and Ljubljana Airport." It adds that Ljubljana has a catchment of more than four million people, spanning into north Italy, south Austria and part of Croatia.

► **SOUTHWEST STAYS OPEN – BUT CUTS QUEUES**

Southwest Airlines will preserve its signature open-seating policy but eliminate pre-boarding queues for travellers, the carrier announced on September 19.

The new queuing system, which will take effect at all Southwest locations by early November, is among a handful of initiatives the carrier has announced to spark a recovery from a recent period of lagging profits.

After revenues plummeted 17% year-over-year in the second quarter, Southwest announced a plan to cut dozens of mostly transconti-

ental routes, re-focusing its growth strategy on shorter-legs between cities such as Los Angeles and San Francisco. The recovery plan also included a review of the open seating policy and the boarding process.

MODIFIED PROCESS: In June, Southwest tested an assigned seating system in San Diego, but found that most customers disapproved. The carrier next experimented with the modified boarding process at the San Antonio International Airport in August.

"One of our primary goals with the new boarding is to

give customers back what they value most – time," said CEO Gary Kelly. The new procedure subdivides travelers into groups of five based on check-in times. The system should allow customers to avoid queuing until boarding starts.

The carrier added: "Today's announcement is the first step in a laundry list of items the carrier will introduce over the next several months. The new style of boarding opens the door to future enhancements for the carrier, allowing for product customisation and additional incentives for the business and leisure traveller."

Southwest Airlines looks to develop international network

SOUTHWEST AIRLINES

BASE: Dallas, Love.

Southwest Airlines is represented at Routes for the first time and will use the event to help it plot an international network. Southwest has not operated a single international flight in its 36-year history but is keen to launch international services, initially through code-share partners and eventually using its own aircraft.

Southwest vice-president strategy, procurement and technology Bob Jordan says Southwest's network will include international destinations for the first time in early 2009 when its current domestic codeshare with ATA Airlines will be extended to include Mexico. Southwest has codeshared with ATA on domestic flights since early 2005 and Jordan says Southwest is now investing \$5-10 million to develop technology to support an international codeshare. He says Southwest is also upgrading its revenue



accounting system to handle foreign currency transactions.

ATA now serves Cancun and Guadalajara in Mexico from Chicago Midway. Southwest plans to place its code on these ATA flights and as part of its deal with ATA has the right to codeshare on any new flights ATA adds to Mexico, the Caribbean and Canada. Jordan says Southwest will also pursue codeshares with other carriers in markets not served by ATA. "We'd be interested in other domestic codeshare part-

ners and foreign codeshare partners," he says. "For the right partner the incremental business is there. But it takes finding the right partner and the right agreement."

He adds codeshares with foreign carriers will likely be implemented in early 2010 and after that Southwest would look to operate its own aircraft overseas. "That's in the 2010 plus pipeline," Jordan says. "We got the strategy to get us there but it's a multi-year strategy."

Mexican airports and commu-

nities for years have been trying to attract Southwest Airlines, which is based just north of the border in Texas. Mexico seems like a natural market for Southwest as its domestic network approaches saturation and Mexican low-cost carriers are now starting to fly trans-border routes.

Jordan will not be at Routes but Southwest is represented here by director of capacity planning Brooke Sorem and manager of network strategy Lee Lipton. Sorem says: "We felt that based on our network development and international opportunities in context with our codeshare strategy that it was time for Southwest to start the educational process about international markets. This is really an opportunity for Southwest to expand our knowledge of international markets and develop the relationships and continuity with the individuals and markets that will help prepare for us evaluating how we should proceed in this arena."

Clickair plans more dramatic expansion

CLICKAIR

BASE: Barcelona

Spanish low-cost carrier Clickair, which turns one-year-old next week, plans to use its first Routes to develop relationships with potential new airports. The Barcelona-based carrier already serves 39 destinations, plans to serve 50 by year-end and is looking to add several more in 2008 as it takes delivery of six additional Airbus A320s, giving it a fleet of 30 aircraft.

Chief executive Alex Cruz (pictured) says Clickair is in particular looking for new destinations that are just within the limits of the A320's range. Clickair is interested in launching medium-haul routes from Spain to east Europe and northeast Africa that can be oper-

ated during overnight hours in order to improve its aircraft utilisation and thereby further reduce its already low cost base.

"We are looking at places like Cairo and Athens," says Cruz, who will be attending Routes to meet with airports and speak at Monday's leadership forum.

Clickair already uses two of its A320s during overnight hours to operate services to Helsinki and Moscow. Cruz says these seasonal services will be suspended at the end of the summer schedule but resumed next summer at a higher frequency than 2007. He says new overnight services will be "unleashed" in both its summer and winter schedules and next year Cruz hopes six of its A320s will be operating overnight.

"The utilisation works out really well but only for very select destinations," Cruz says.

Clickair is also looking to con-

tinue its network strategy of serving Europe's main business airports. It already flies to Frankfurt International, Milan Malpensa and Rome Fiumicino and is the only low-cost carrier at London Heathrow. "We know passengers are willing to drive less and pay more," Cruz says.

Closer to home, Clickair plans to launch new domestic routes this winter from Barcelona to Palma, Bilbao, Orvieto and the Canary Islands. He adds Clickair will "probably develop Valencia and Seville" a little bit more but will stay away from expanding at Madrid because there is already too much low-cost carrier competition there.

"We need to be humble because the challenges ahead are tough," Cruz says. He adds the launch of high-speed train services later this year on Europe's busiest air route, Barcelona-Madrid, will make the Spanish market even tougher.



In spite of difficulties Gol and TAM have both made domestic and international progress

Buoyant BRAZIL

Richard Larke, chief financial officer of Gol



BY GUNTER ENDRES

Along with a strengthening economy, the Brazilian air transport market recorded double-digit growth in each of the last three years. This sudden spurt caught the authorities on the hop, resulting in air traffic control problems in the air and infrastructure inadequacy on the ground. In spite of these difficulties, particularly in the last 12 months, exacerbated still further by tragic accidents suffered by Gol in September 2006 and TAM in July, both airlines have made progress domestically and internationally. Figures released by the Agência Nacional de Aviação Civil (ANAC) at the end of July show that TAM Linhas Aéreas had a domestic marketshare of 49.3%, compared to 42.9% of Gol Transportes Aéreos/Varig. On the international front, the dominance of TAM was even more marked with a 65.6% share. However, following the acquisition by Gol, Varig is embarking on rebuilding its former network.

"The main reason in buying Varig," says Richard Lark, Gol's chief financial officer, "was for the domestic routes, especially its strength in São Paulo, but we also saw it as an opportunity to use a strong existing brand as a way into the long-haul market."

Prior to Gol's interest, TAM came close to buying Varig, but pulled out to set up its own standalone long-haul operation. "Varig presented a good opportunity for Gol, says TAM's president Marco Antonio Bologna, "and while we now have a strong competitor in the international market, I feel comfortable with the situation."

TAM now serves several regional destinations, including Buenos Aires, Santiago de Chile, Cochabamba, Santa Cruz de la Sierra, Caracas, Montevideo, and the Paraguayan capital Asunción, from where it also flies under

the name of TAM Mercosur. Connections are provided from São Paulo to Miami and New York and across the Atlantic to London, Paris and Milan, with Frankfurt to be added in November and Madrid in December. Following the transfer of its codeshare arrangement from American Airlines to United Airlines, Los Angeles is likely to be added, as is a route across the South Atlantic to South Africa, although this is some way in the future. The more immediate changes will be upward adjustments next year in frequencies on exiting routes, probably to Paris, London and New York, and TAM is also looking towards adding more flights from cities other than São Paulo, with Rio de Janeiro in the south and Recife and Salvador in the northeast tipped for future international hub status. TAM will start taking delivery of Boeing 777-300ERs in summer 2008 to supplement or replace its A330-200s on the higher density routes.

VRG Linhas Aéreas, which operates the Varig brand, currently flies to only six international destinations, comprising Buenos Aires, Bogotá and Caracas in South America, and Frankfurt, Paris and Rome in Europe. Services to Paris and Rome, inaugurated on 20 September 2007, are part of Varig's expansion plan, which also envisages new daily flights to Madrid, London, Mexico City, Montevideo and Santiago, all to be added before the end of 2007. Gol flies regionally to Argentina, Bolivia, Chile, Paraguay, Peru and Uruguay. Any duplication of regional routes with Varig are clearly separated, offering passengers a choice between the low-fare, no-frills Gol offering and the full-service provided by Varig. Gol uses Boeing 737-800s on its cross-border routes, while Varig utilises Boeing 767-300ERs.

BRA Transportes Aéreos, which was originally founded as a charter company but transformed itself into a low-fare scheduled airline in March 2006, currently has a 3.2% share of the

domestic market and a 6.6% share internationally, putting it fourth among Brazil's airlines in both categories. Its recent growth has been made possible by a capital injection from global investment consortium Brazil Air Partners, which now owns a 20% stake in the airline. BRA operates to 32 domestic destinations, together with international schedules with Boeing 767s across the Atlantic to Lisbon, Madrid and Milan, and to Bariloche in neighbouring Argentina. Regular flights are also made to Cologne, Rome, Stockholm, Oslo, Oporto and Tel-Aviv. No new international routes have been announced, but the recent order for a large number of Embraer E-195 regional jets will enable the airline to upgrade and substantially increase its domestic network.

Since 18 June, BRA has had a codeshare agreement with OceanAir Linhas Aéreas, but this arrangement is being severed on 30 September because the two airlines have "distinct client profiles". OceanAir, whose owner Germán Efromovich also controls Colombia's Avianca under the Synergy Group label, is moving towards becoming a full-service airline, with co-ordination of schedules and branding now well-advanced. It already provides a feeder service to Avianca at São Paulo's Guarulhos airport. Although it flies to 25 destinations in 12 states along the length of the eastern coastal belt, its present domestic marketshare is a lowly 1.9%. ■

The Brazilian air transport market recorded double-digit growth in each of the last three years



BY KERRY EZARD

Swedish airports operator LfV Group is determined to use this year's Routes, which is being hosted by LFV-controlled Stockholm Arlanda, as a platform to put Sweden firmly on the map by boosting international air travel to the country as a means of countering the declining domestic market.

LfV Group's director general, Lars Rekke (pictured above), says a decline in the domestic air travel market in Sweden has left the country trailing behind other European nations – something he is optimistic can be put right by focusing on the international market.

"Air traffic growth in Sweden is not up to the European average, I'm sorry to say," says Rekke. "The reason is that domestic traffic, which represents 40% of the total passenger volume, is decreasing or developing flatly because the Government has allocated lots of money for building railways and motorways, particularly in central and southern Sweden." This has meant that Swedish people have been turning away from air transport for domestic travel, preferring instead to use different methods of transportation.

However, there is light at the end of the tunnel in the form of the potential offered by international air travel, which is growing at a 6-7% annual clip. "The international

The reason I am so optimistic about an international market is that Sweden has a huge export industry

LFV GROUP

Routes' hosts are putting Sweden on the map...

sector is the one we're focusing on," says Rekke. He adds that there has been strong European growth from Stockholm Arlanda, as well as strong growth to North America. But the key markets Rekke has on his mind lie much further east.

"We are very focused on trying to attract airlines to fly direct to the Far East and the Middle East. A number of airlines have opened or will open services to these areas, but there is still a lot to be done. These are the most important areas for us, in addition to North America." Qatar Airways will in November begin operating four non-stop flights a week between Stockholm Arlanda and Doha, while Scandinavian Airlines has this year unveiled direct flights from the Swedish capital to Bangkok and Beijing.

As a way of attracting international flights to Sweden, LfV Group offers a number of incentives to airlines which launch service to destinations not currently served from any of its airports. "It is possible for airlines to have very low prices and marketing help," says Rekke. "We offer very low charges and have made a number of price decreases in recent years. We are very active in marketing our market."

Rekke plans to actively promote Swedish airports during Routes and develop as many new contacts with airlines as possible. "We are very keen on making new contacts because we have a good market here in Sweden and there are no problems with

capacity," he explains. Unlike a number of other European countries which are struggling to overcome capacity constraints at their major airports, Rekke says Sweden has plenty of room to accommodate the international growth it is seeking. "We have huge capacity in Sweden, therefore we are not planning any enormous investments in new runways and so on over the next 15 years."

This is probably just as well, given the high political profile of the impact of aviation on the environment, and the future restrictions this could bring. "There is always an awareness among politicians that aviation contributes to climate change, and we are prepared for the possibility of different measures in the future when it comes to the environment," says Rekke.

PASSENGER INCREASE: LfV Group's largest airport, Stockholm Arlanda, saw its passenger numbers increase by 3% year-over-year in 2006. This was slightly lower than the level of growth at the company's two mid-sized airports, Gothenburg Landvetter and Malmö, where passenger numbers rose by 5% and 4%, respectively.

LfV Group also operates 13 "relatively small" airports throughout Sweden, some of which could potentially be sold off as domestic air travel continues its decline, says Rekke: "In the past, a number of airports that were in our portfolio have been taken over. This will happen to others." ■

Bellissimo! Myair brings low fares to small airports

Italy's Myair is looking to bring low fares to small airports in Eastern Europe as it takes delivery of more regional jets.

Myair general manager Edgardo Badialli says the Bergamo-based carrier is using its new fleet of four Bombardier CRJ900s "to scout new markets". He says operating two aircraft types is unusual in the low-cost industry but Myair thought it was necessary because while the European low-cost market is becoming saturated there are many opportunities in smaller markets that cannot support 180-seat aircraft.

"This aircraft allows us to do scouting work without increasing risk," he says.



Myair launched services in late 2004 with Airbus A320s. It has just added its seventh A320 and will add four more in October. It took delivery of all four of its CRJ900s in the first quarter of this year and has orders for 15 100-seat CRJ1000s.

Myair has several small bases in Italy and recently opened its first overseas base in the Romanian capital Bucharest. Badialli says Myair is now looking to open a second over-

seas base "probably in the Balkans". He adds a secondary market in France is also a possibility.

In addition to operating nine routes from Bucharest to Western Europe, Myair now operates

four routes from Sofia in Bulgaria. Badialli says Myair will add services to Bosnia and Serbia as soon as it receives the relevant route authorities. "As soon as there's an opportunity there we will jump in," he says.

Myair is also looking to open new bases in small Italian cities. Earlier this year it opened a one-aircraft base in Bari and Badialli says Myair is now looking to add a second aircraft there.

International expansion for Thailand's Nok

Thai low-cost carrier Nok Air is looking to expand its fledgling international network as its doubles its fleet over the next year.

Nok serves 12 domestic destinations from its Bangkok hub and in June launched its first international service, to Bangalore in India. Chief executive Patee Sarasin says the carrier plans to launch its second international route, Bangkok-Hanoi, on 1 November and "next year there are two possibilities, Hong Kong and Macau, which we are studying very closely".

Nok has been talking to

Macau, which is already served from Bangkok by rival low-cost carrier Thai AirAsia, since 2005. "At that time there was no market for Thais going over there. Now the market is ready."

Meanwhile, a recent reduction in landing fees at Hong Kong for new carriers is attracting low-cost operators that have traditionally avoided the airport because of its high cost base. AirAsia recently announced plans to begin flying to Hong Kong from Kuala Lumpur, Kota Kinabalu and Bangkok. Patee says Nok is also interested in Hong Kong but

may prefer Macau because of its huge growth in tourism and the fact it is a newer market that can be stimulated.

Nok also plans to launch three more Indian destinations, Chennai, Hyderabad and New Delhi but is holding off because "the load factors are not there yet" on its Bangalore route. Patee says the Bangalore service is now operating at 50-60% load factors but he expects this will rise to 70-80% in October. "We'll be happy with that."

Nok last week took delivery of its eighth 737-400 and will add one 737-400 plus two wet-leased 737-800s by the end of the year. Another four 737-400s will join the fleet in 2008. In addition to international expansion, Patee says the extra aircraft will be used to launch three more domestic destinations. He adds that will signal the completion of its domestic network and Nok will not expand too quickly because the domestic market may become saturated in two to three years.



AirBaltic looks to grow ex-Soviet network further

Latvian carrier airBaltic is looking further to expand its network in former Soviet states as it grows its Boeing 737 fleet.

The carrier now serves almost 20 destinations in the CIS and Central Asia, making it the third largest European carrier in this region after Lufthansa and Austrian Airlines. Chief executive Berthold Flick says airBaltic is planning to add two more new routes to the Ukraine and one to Russia over the next few months. He says the carrier will also launch a service to Tashkent in December "and we're looking at other Central Asian markets as well".

"We're moving very strongly into a niche that hasn't been exploited by low-cost carriers," Flick adds.

AirBaltic is an unusual low-cost carrier in that it offers two classes of service and has several airline partners. Flick says partnering with other carriers is necessary to penetrate markets in many former Soviet states because very few passengers buy tickets online. "I can shake hands personally with all the passengers from Belarus who buy on the Internet," he jokes.

Flick says 30% of airBaltic's two million annual passengers are already from former Soviet states and this is by far its fastest growing market. But he says the carrier needs liberalisation in order to continue expanding in the region. Several countries restrict the number of flights airBaltic can operate and several prevent it from selling low fare tickets. The carrier operates 21 aircraft, a mix of Boeing 737s and Fokker 50s, and will take delivery of four more 737-300s next year.



To read the Airline Business blogs visit www.flightglobal.com/ab

Bangalore on track for 2008 opening



BY MARK PILLING

India's latest airport to be developed in partnership between the public and private sectors is scheduled to open in April 2008. The green field airport at Bangalore will have an initial capacity of 11 million passengers annually, growing to some 40 million by the time it is fully developed.

Construction is well advanced on a terminal for domestic and international passengers, a single runway and 42 aircraft stands, says Bangalore International Airport Limited (BIAL). The majority shareholder in BIAL is Germany's Siemens with 40%, Unique Zurich and Larsen & Toubro with 17% each, and the Airports Authority of India and KSIIDC, an agency owned by the state of Karnataka, with 13% each.

The new airport will take over from the existing one, which handled 8.1 million passengers in the year to March 2007, a rapid hike of 44% compared to the previous year. According to BIAL: "Based on the concession agreement between BIAL and the government of India, it has been specified that the new airport will replace the existing Bangalore Airport and the present air-

port will be shut for civil aviation."

The current airport is already straining to handle the rise in traffic and BIAL is confident the new airport will enable it to continue its strong expansion. "BIAL is talking to all international and a domestic airline to make sure that the airport serves as a regional hub in India. Also, we need to keep in mind that India does have a huge domestic market and buying power for future development."

INTEREST: Several European and Asian carriers already serve Bangalore, but "more airlines especially from the Middle East have shown interest", says BIAL. "However, the space and the slots at the present airport set clear limits. Once the new airport is operational and these limits are dissolved, we are confident that the connections to Far East, Europe and even America will be improved. Furthermore, Bangalore with its strong business market, ideal location and hub potential will attract more domestic airlines."

The latest carrier to arrive at Bangalore is Thai low-cost carrier Nok Air with its first international service. It began a daily Boeing 737 flight from Bangkok's Suvarnabhumi Airport in June.

Main pic: Artist's impression of the departures hall at Bangalore's new international airport; Above: The new airport is scheduled to open in April 2008 Pictures: BIAL

► DELHI UPGRADES

Delhi International Airport Pvt Ltd (DIAL), the Public private partnership awarded the contract to operate and develop the airport in 2006, says it is on track with a series of projects to expand and modernise the city's Indira Gandhi International airport.

Work is underway on building a new domestic terminal, the modernisation of the existing international terminal, the building of a new international Terminal 3 as well as the construction of a third runway for the airport.

The 4,430m long runway will be capable of handling aircraft up to the size of the Airbus A380 and is scheduled to be operational by mid-2008. The new domestic terminal will also be ready around this time helping to cater to the fast growing local market, as will a large upgrade of the international Terminal 2.

The largest project is the 480,000m² Terminal 3, which is planned to enter operation in 2010 in time for the Commonwealth Games taking place in India that year. Work on the four boarding piers is well advanced, says DIAL. The terminal will feature 55 airbridges.

DIAL won the contract to modernise the airport in January 2006. The partners in the joint venture company are India's GMR Group, Airports Authority of India, Fraport, Eraman Malaysia and India Development Fund.

Towards a new airport for Mumbai

The global call for consultants in early September to bid for a prime planning role for Navi Mumbai International Airport is the latest development in an ambitious project to develop a brand new gateway for India's busiest city.

The new airport is urgently needed, with the city's current hub, Chhatrepathi Shivaji Airport, facing severe congestion and expected to reach full capacity by 2013. In 2006, the airport handled 17.5 million passengers but is growing annually at double-digit rates. It is predicted to reach saturation point with some 40 million passengers a year by 2013.

Extensions to the existing terminals and a second runway have been discussed but declared unfeasible because of housing that is built right up to the airport's boundaries.

A greenfield airport located in the city of Navi Mumbai (New Bombay), has



been discussed since 1998, however the project received a major boost in May when it was granted government approval via the Ministry of Civil Aviation.

It will be developed in a public-private partnership with private firms able to take a 74% stake in the project with the state-owned Airports Authority of India and the local Maharashtra government taking 13% each. The estimated project cost is put at \$2.5 billion. The responsibility for overseeing the development of Navi Mumbai Airport is with the public City & Industrial Development

Corporation of Maharashtra (CIDCO).

The ambitious timescale calls for Navi Mumbai's new airport to be operational by 2013, when the existing airport reaches full capacity. It will be built in phases with the first having a capacity of 10 million passengers per year. From then on, the four remaining phases will take five to eight years each, all adding an extra 10 million capacity to the airport, so that by 2030, the airport will be able to handle 40 million passengers per annum. The plan is for the airport to have two parallel runways allowing simultaneous approaches and take-offs.

CIDCO says it wants to select a consultant to prepare the detailed master plan and project plan for the Navi Mumbai International Airport shortly after the bids are received in mid-October.

The aim is for both Navi Mumbai and the existing international airport to operate independently once the new airport is open with each allowed to develop its own customer base.

The first phase of the new Navi Mumbai airport could be operational by 2013

To read the new Navi Mumbai airport blogs visit flightglobal.com/ab



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Norwegian head Bjorn Kjos
 plots low-cost onslaught

Bjorn Again



BY KERRY EZARD

Bjorn Kjos, chief executive of Oslo-based low-cost carrier Norwegian, is the first to admit that his work schedule is about to get much busier following the acquisition of Swedish budget carrier FlyNordic and a recent firm order for 42 Boeing 737-800s.

But Kjos is ready for the challenge as he focuses on strengthening the networks of both Norwegian and FlyNordic, as well as turning around the latter's fortunes and making it profitable.

Norwegian recently signed a firm order with Boeing for 42 737-800s plus 42 purchase rights, building on a previous lease agreement for 11 of the same model. Kjos says the new aircraft will be used to replace Norwegian's 22-strong fleet of Boeing 737-300s, as well as FlyNordic's Boeing MD-80 fleet. The leased aircraft will be delivered between 2008 and 2010, while the purchased aircraft are scheduled for delivery between 2009 and 2014.

"We will start with FlyNordic and will begin phasing out its MD-80s from next year," says Kjos. He remains tight-lipped on plans for new routes, except to point out that the 737-800s will enable Norwegian to operate longer distance city pairs. The carrier already serves Marrakech, and Kjos says it "may look at" additional destinations in North Africa.

"The next phase will be to expand our operations from Stockholm and Warsaw. We plan to strengthen our network in and out of Scandinavia and we already have a strong position in Norway, so we will concentrate on building our network in Sweden and from Warsaw," he adds. FlyNordic is based at

Stockholm's Arlanda Airport and Warsaw is one of Norwegian's seven bases.

Earlier this year the carrier announced that its seventh operational base would be Rygge, which is located 65km (40mi) south of the Norwegian capital. "Oslo Airport is full in rush hour and we needed more capacity," explains Kjos. The carrier will station two 737-800s at Rygge and will serve 14 cities from the airport, including Barcelona, London and Marrakech.

Kjos adds that Norwegian is "looking at opening a base" in Copenhagen, a move he hopes will occur "as soon as deliveries of the new aircraft start".

FINANCIAL GOALS: Kjos says Norwegian posted a 10 million (\$13.6 million) profit in the first half of this year, and he expects the second half of 2007 to be "considerably better". The carrier saw its passenger numbers increase by 2% year-over-year in 2006 to 5.1 million. Kjos is also confident that FlyNordic will be profitable this year, despite the carrier's

past difficulties in attaining profits.

Norwegian acquired 100% of the Swedish budget operator from Finnair earlier this year in a deal which saw the Finnish oneworld member take a 5% stake in Norwegian and an option to take an additional 5% by the end of the year. Finnair and Norwegian also agreed to link the Oslo-based carrier's Scandinavian network with Finnair's long-haul Asian network.

FlyNordic will continue to operate under its own brand because it is well-known in Sweden, says Kjos, but the newly-acquired carrier will co-operate with Norwegian in a number of ways: "We will codeshare, of course, and we will have an integrated booking platform and fleet management programme to ensure that we get the most out of both companies."

Kjos concedes that the Scandinavian market is very competitive and that SAS remains Norwegian's "biggest competitor". He also says low-cost competition from airlines such as Ryanair and Sterling is increasing, but points out that Norwegian "does not meet Ryanair directly" on any routes because of Norwegian's strategy of serving primary airports.

The recent collapse of Swedish budget carrier FlyMe "did not have much effect" on Norwegian's operations because FlyMe was a small operator and did not fly any competing routes, adds Kjos.

With his newly-increased workload, Kjos is unsure whether he will personally be able to attend this year's Routes event in Stockholm. However, he says he hopes to send somebody from his team because "it is a good event and it's good to see what's going on". ■

The next phase will be to expand our operations from Stockholm and Warsaw. We plan to strengthen our network in and out of Scandinavia

AIRLINES:
NATIONAL CARRIERS

A
Adria Airways
Aer Lingus
Aeroflot Russian Airlines
Aeromexico
Afriqiyah Airways
Air Astana
Air Atlanta Icelandic
Air Baltic
Air Canada
Air China
Air Finland
Air France Long haul
Air France Medium haul
Air India
Air Malta
Air New Zealand
Air Slovakia
Air Tahiti Nui
Air Tanzania
Air Transat
Alitalia
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Arik Air
Atlantic Airways
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China Eastern Airlines
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D
Delta Air Lines
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F
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H
Hainan Airlines
Hawaiian Airlines
I
Iberia Long haul
Iberia Short haul
Icelandair

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Jat Airways
Jet Airways
K
Kenya Airways
KLM Royal Dutch Airlines (Europe)
KLM Royal Dutch Airlines (Longhaul)
Kuwait National Airways
L
LAC/Air Congo
LOT Polish Airlines
LTU International Airways
Lufthansa
Luxair
M
Mahan Air
Malaysia Airlines
Malev Hungarian Airlines
MAT-Macedonian Airlines
Mexicana
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O
Oasis Hong Kong Airlines
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SAS Denmark
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SAS Norway
SAS Sweden
Shaheen Air International
Shanghai Airlines
South African Airways
SriLankan Airlines
Swiss International Air Lines
Syrian Airlines
T
TAM Linhas Aereas
Tarom
Thai Airways
Transaero Airlines
Turkish Airlines
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Ukraine International Airlines
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US Airways
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V

Varig
Vietnam Airlines
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FlyNordic
GB Airways
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Mesa Go Air
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First Choice Airways
FlyNordic
Free Bird Airlines
Freshline
Futura International Airways
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Hamburg International
HellasJet / Air Miles SA
Inter Airlines
JetX Limited
KD Avia
Latcherair Airlines
Livingston S.P.A
Malmo Aviation
Martinair Holland (Passenger)
Monarch Airlines
My Travel Airways Scandinavia
Netjets
North American Airlines
Nouvelair Tunisie
Novair
Omni Air International
Ormskavia
Privatair
Private Wings
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World Airways
Zenith Airways

LOW COST

Air Asia X
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AirBlue
Belle Air
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WizzAir
Zoom Airlines (UK)

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Air China Cargo
Air Contractors
Amapola Flyg AB
Astral Aviation
Coyne Airways
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Thomas Cook Group Denmark
Thomas Cook Tour Operations

Germany
Thomas Cook Tour Operations
UK
TUI AG
TUI Netherlands
TuiNordic
Vacancies Transat Holidays
Virgin Holidays

ALL BUSINESS CARRIERS

L Avion
Maxjet

SLOT CO-ORDINATORS

AENA: A.C and General Advice
Airport Coordination
Denmark and Iceland:A.C and General Advice
Airport Coordination
Germany: AC
Airport Coordination
Germany: General Advice
Airport Coordination
Greece :
General Advice
Airport Coordination
Netherlands:
General Advice
Airport Coordination Norway:
A.C and General Advice
Airport Coordination
Sweden: A.C
Airport Coordination Sweden:
General Advice
Airport Coordination
UK: General Advice
AssoClearance: General Advice
Brussels Slot Coordination: A.C
Brussels Slot Coordination:
General Advice
Cohor: A.C
Cohor: General Advice
Cyprus Airport Facilitation
Hungarocontrol: A.C and General Advice
Schedule Coordination Austria:
General Advice
Schedule Coordination Malta:
General Advice
Schedule Coordination
Portugal: A.C
Slot Coordination Portugal:
General Advice
Slot Coordination Prague: A.C
Slot Coordination Switzerland:
General Advice
Turkish Slot Coordination: A.C
Turkish Slot Coordination:
General Advice

*A.C. denotes Active Co-ordination

▶ **LEADERS' FORUM INFORMATION...**

SESSION 1:
OPEN SKIES ACROSS THE ATLANTIC – OPPORTUNITY OR THREAT?

An update from both the EU and US perspectives and discussion on the implications for the future of global open skies.
CHAIR: Marie Ehrling, former SAS executive
SPEAKERS: Gilles Gantelet, deputy head internal market, aviation agreements and multilateral relations of the directorate general for energy and transport, European Commission; Duncan Garrood, commercial director, BAA; Paul Gretch, director of the office of international aviation at the US Dept of Transportation; Bernard Miaillier, head of DAS/SAS business division, Eurocontrol, Willie Walsh, chief executive, British Airways

SESSION 2:
STRETCHING THE LOW COST MODEL?

Is long haul/low cost a viable proposition and what would be the impact on network carriers?
CHAIR: Professor Rigas Doganis, Doganis & Associates; **Speakers:** Dato' Seri Bashir Ahmad Abdul Majid, MD, Malaysia Airports Holdings; Kjeld Binger, CEO DAE Airports; Alex Cruz, CEO, clickair; John Hanlon, secretary general European Low Fares, Airline Association; Kerrie Mather, CEO Macquarie Airports & executive director, Macquarie bank; Azran Osman-Rani, CEO, AirAsia X; David Stroud, MD, ASM

SESSION 3:
THE GREENING OF AVIATION

Growth in air services will attract increased environmental pressures – but who will bear the cost?

CHAIR: Professor Rigas Doganis, Doganis & Associates;
SPEAKERS: Fariba Alamdari, VP market and value analysis, Boeing Commercial Airplanes; Tim Clark, president Emirates Airline & MD Sri Lankan Airlines; Wu Fan, director general Office of Civil Aviation Leadership Group, Yunnan Provincial People's Government and chairman; Yunnan Provincial Airports Group, Kuming Wujaba International Airport; Roger Gardner, director general Omega and chairman Kunming Airport, China; Paul Johnson, director, environmental consulting, Arup Group; Paul Luitjen, senior director corporate affairs, Schiphol Group; Asa Torstensson, Swedish Minister of Infrastructure

SESSION 4: THE WAKING GIANTS

As China and India boom, what are the

similarities and what are the differences?
CHAIR: Rigas Doganis, Doganis & Associates **Speakers:** Kiran Kumar Grandhi, MD, GMR Hyderabad International Airport; Anita Mehra Homayoun, VP marketing & corporate communications, Dept of Civil Aviation/Dubai International Airport; Justin Symonds, global head of transportation and logistics sector advisory, ABN AMRO; Rong Hua Wang, director general of the Dept of Air Transportation of the General Administration of Civil Aviation of China

■ The Leaders Forum is co-located with Routes, which this year is expected to attract more than 2,000 air service development professionals to discuss and plan new air service opportunities worldwide.



Fancy a day of culture and want to learn more about Stockholm and its people? The Swedes take pride in their heritage and have many museums. Here are a few...

Go on, push the boat out...

■ CITY MUSEUM OF STOCKHOLM

Ryssgården (Slussen), ☎508 316 00
Open: Tue-Sun 11am-5pm, Thu 11am-8pm, www.stadsmuseum.stockholm.se
Built between 1663-1685 this building had been a prison, school, court and theatre before it became a museum in 1937. Here you can learn the history of Sweden's capital, from fortified port on the Baltic Sea in the medieval ages to the modern capital it is today.

■ NATIONAL MUSEUM

Södra, Blasieholmshamnen
☎519 543 00. Open: Tues 11am-8 pm. Wed-Sun 11 am-5 pm. Closed Mon
Built in 1866 and designed in Venetian and Renaissance styles this museum houses Sweden's finest art collection with around 16,000 paintings and sculptures. Among the paintings are works by Rembrandt and Rubens, as well as more

recent Swedish pieces. The handicraft section covers works from over the past 500 years.

■ SWEDISH MUSEUM OF ARCHITECTURE

Skeppsholmen (Exercisplan/ Slupskjulplan) ☎587 270 00, www.arkitekturmuseet.se
Open: Tue-Wed 10am-8pm, Thu-Sun 10am-6pm
Scandinavians are well-known for their modern architecture. Here visitors are guided through a 1,000 years of their designs from the simplest drawings of wooden buildings to impressive state-of-the-art designs. The museum's archive holds two million drawings and 600,000 photographs. Admission free.

■ SWEDISH NATIONAL MARITIME MUSEUM

Djurgårdsbrunnsvägen 24
☎519 549 00, www.sjohistoriska.se



RICHARD RYAN

■ VASA MUSEUM | Galärvarvsvägen 14, ☎519 548 00

Probably Stockholm's most popular museum. The Vasa, a royal warship, the largest and most ornate vessel of its day, sank in Stockholm Harbour on its maiden voyage in 1628. It was raised in 1961, fantastically preserved due to the cold waters (and lack of shipworm damage). It is now fully preserved and the highlight of this museum. Walk around the ship and through reproductions of life as it seemed in the 1600s. Thousands of objects were salvaged from the wreckage including skeletons, clothes, cannons, tools, coins and rum – all are on display. A film is shown to give full history.

The Swedes know what they're doing when it comes to ships. This museum illustrates Sweden's long history of ship-building, merchant shipping and ocean liners. Vessels and warships from the 17th century are displayed, as well as paintings, weapons and uniforms.

■ STOCKHOLM TRANSPORT MUSEUM

Tegelviksgatan 22, Open: Mon-Fri 10am-5pm. www.sparvagsmuseet.sl.se
A museum packed with vehicles, drawings, uniforms and tickets illustrating the history of local transportation from horse-drawn buses to the metro.

ALL YOU NEED: Some useful telephone numbers to help smooth over your visit to Routes in Stockholm.

■ AIRPORT INFO:

• **Stockholm Arlanda Airport**
Lufftartsverket Arlanda, S-190 45 Stockholm Arlanda
☎797 6000 / www.lfv.se
• The Arlanda airport express train leaves for Stockholm's central station every 15 minutes and costs 200 crowns (SEK200/ £14.70) for the 20-minute journey.

■ PHONE INFO:

Code for Sweden: +46
Stockholm Area Code: 08

■ EMERGENCY NUMBERS:

• Police, Fire, Ambulance: 112
• Healthcare Information Service (for minor problems): ☎463 91 00

• 24 hour pharmacy

The CW Scheele Pharmacy
11181 Stockholm, Klarabergsgatan 64

■ TOURIST INFO:

• **Main tourist office**
Hamngatan 27, ☎ 508 28 508

www.stockholmtown.com

• **Tourist centre/ excursion shop** Segels Torg 1 ☎508 28 508
www.stockholmtown.com
• **City sightseeing** (Guided bus tours) Gustav Adolfs Torg ☎587 140 20
• **Stockholm sightseeing** (Guided boat tours) Stromkajen, Grand Hotel ☎587 140 20

■ EMBASSIES AND CONSULATES:

• **British Embassy**
Skarpogatan 6-8, 115 93 ☎+46 (8) 671 3000

• United States Embassy

Dag Hammarskjölds Väg 31, SE-115 89.
☎+46 (8) 783 5300

• Denmark

Jakobs Torg 1, Box 1638, 111 86,
☎+46 (8) 4067500

• Finland

Gärdesgatan 11
☎+ 46 (8) 676 6700

• France

Box 5335, 102 47 Stockholm
☎+46 (8) 459 53 30

• Estonia

Tyrgatan 3/3a, 11427.
Box 26076, 10041

☎+46 (8) 5451 2298

• Germany

Skarpogatan 9, Box 27832, 115 27.
☎+46 (8) 6 70 15 00

• Italy

Oakhill – Djurgården
☎ +46 (8) 5456 710

• Netherlands

Gotgatan 16A
104 65.
☎ +46 (8) 556 933 00

• Norway

Skarpögatan 4, S-115 27
☎ +46 (8) 665 6340

• Japan

Gärdesgatan 10, 115 27
☎ +46 (8)579 353



USEFUL INFO