

BRINGING YOU THE NEWS FROM THE IATA WORLD AIR TRANSPORT SUMMIT AND ANNUAL GENERAL MEETING IN KUALA LUMPUR



HANDS UP FOR MOBILE TECHNOLOGY

Aviation bosses at the IATA AGM chipped in to promote the upcoming roll out in October of SITA's mobile check-in technology.

It will be available to 138 airlines on the SITA reservations system but its client Malaysia Airlines will be the first to implement it.

National airports operator Malaysia Airports has installed 2D barcode readers, for mobile check-in, at Kuala Lumpur, Penang and Kota Kinabalu airports.

Here we see (from left to right) SITA CEO Francesco Violante, Malaysia Airlines CEO Idris Jala, Malaysia Airports MD Bashir Ahmad and IATA director general Giovanni Bisignani showing off the technology. Mobile check-in is just the latest in a series of innovations under IATA's 'simplifying the business' programme.

Technology innovation: see page 4

NEVER WASTE A GOOD CRISIS

Idris Jala is reshaping Malaysia Airlines to weather the downturn, accelerating the second phase of the airline's turnaround plan

BY VICTORIA MOORES

Malaysia Airlines chief executive Idris Jala has issued a rallying call to his staff, urging them to pull together even harder to face the crisis and combat both the downturn and the "quadruple squeeze" that is placing such a massive strain on the industry.

Saturday's New Straits Times

here in KL carried a double page advertising splash from the national carrier calling on every one of its 19,000 employees to work together to overcome what Jala labels as "the worst environment airlines have seen in a long, long time". But he adds: "After we finish the crisis, we will think it was a great crisis because we didn't waste it." Airlines are under pressure from falling demand, says Jala, but their health is also being eroded by highcost fuel hedges which were fixed when prices were spiralling upwards. "Effectively [some] airlines are paying more than \$100 barrel for fuel," he says. Meanwhile, lower fuel prices mean fuel surcharges are no longer available to ease the hangover. "As if that is not enough, the airline industry is caught up with the fourth squeeze of swine flu," adds Jala. "Caught between four squeezes, the man in the middle is finding it hard to survive."

He believes it is essential for airline industry leaders to bring hope,

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Oneworld revenues stack up

Airlines in the decade old oneworld alliance generated record revenues from sales activities during the past year

More than eight million passengers transferred between the airlines' flights in 2008 producing interline revenues of \$2.4 billion, up 10% year-on-year, while revenues from oneworld fares and sales activity in 2008 totaled more than \$850 million, a 25% hike.

These oneworld revenues grew significantly faster than member airlines' overall passenger revenues, which collectively edged up just 3.5 per cent.

The alliance's latest results were revealed as the CEOs of its member airlines met in Kuala Lumpur for their mid-year governing board session – with S7 Airlines' Vladimir Obyedkov and his team welcomed to their first gathering since the airline was elected on board last month as a member des-



ignate, to join next year.

Oneworld managing partner John McCulloch said: "The results from the past year and from oneworld's first decade make abundantly clear the growing value the alliance has added to all its key stakeholders.

"In an industry where profit margins are thin at best - let alone at times of global economic downturn - revenues and cost savings from oneworld have made an increasingly important contribution to our member airlines' financial standings."

The alliance and its transatlantic airlines are working on plans in anticipation of gaining antitrust immunity (ATI) in the USA, with regulators there due to rule by late October on the ATI application by American Airlines, British Airways, Finnair, Iberia and Royal Jordanian. These carriers are also seeking the necessary regulatory approval from the European Union.

The alliance is also preparing to welcome Mexicana and affiliate MexicanaClick later in 2009.



After nearly 30 years with American Airlines, senior VP planning Henry Joyner is leaving for retirement. Joyner has been oneworld's man at American since the alliance launched a decade ago and his oneworld colleagues marked his send-off with a personally-signed cricket bat. Apparently he developed a fixation for the game after mixing with Brits and Aussies during his time in aviation.

Joyner, who is responsible for scheduling, revenue management, corporate real estate, fleet planning, airline alliances and international regulatory affairs, first joined American as a financial analyst in 1980. He moved into marketing and helped develop AAdvantage, the industry's first loyalty scheme. His previous roles with American include managing director of airline planning, vice-president of personnel resources and vicepresident of marketing planning. Joyner joined American when it operated only within North America and the Caribbean. He concludes: "Growth of the alliance network is one of the strongest, most extraordinary things of my career - plus all of these guys can really drink beer!"



There's safety in IATA numbers

ATA director general Giovanni Bisignani celebrates with nine airline CEOs as all of the association's members achieve accreditation under IATA's operational safety audit programme (IOSA). "This is a great achievement and an important mark of quality for all IATA airlines," said Bisignani. Chief executives, pictured left to right: Willie Walsh from BA; Dave Bronczek from FedEx Express; C.S. Chew from Singapore Airlines; Wolfgang Mayrhuber from Lufthansa; Idris Jala from Malaysia Airlines; IATA director general Giovanni Bisignani; Tony Tyler from Cathay Pacific; Gerard Arpey from American Airlines; IATA chairman and Royal Jordanian's Samer Majali; and finally Fernando Pinto from TAP.

AIRLINE BUSINESS D

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IATA showcases 'simplifying the business' project

Delegates at IATA's AGM witness how self-service helps to process passengers more quickly

BY LEITHEN FRANCIS

ATA, Malaysia Airlines (MAS) and Malaysia Airports are using this week's AGM to showcase the 'simplifying the business' programme that aims to cut costs while delivering better standards of customer service.

The man in charge of 'simplifying the business', Philippe Bruyere, says the programme started in June 2004 with five individual projects such e-ticketing, bar-coded boarding passes and common-use self-



Bruyere prints his own baggage tag

service machines. But the programme has evolved since then.

He explains: "Having this showcase at the annual general meeting demonstrates that all these projects do bring value but from a customer point of view if you don't apply an end-to-end [solution] then you create break-down." "Simplifying the business' shows that we have moved from individual innovations taken in isolation, to a much more integrated end-to-end journey, trying to focus on all the steps of the travel experience."

Airline executives here in KL can see first hand how innovations such as self-service check-in machines and 'ready to go' baggage drops make it easier for travellers to get through airports and onto the aircraft.

Bruyere also advises that when implementing self-service options "you need to make it as intuitive as possible", making it obvious what the passenger needs to do next and making it clear where passengers can go if they need help working the equipment.

Help needs to be on hand because if there is no one to help then the passenger will give up and go back to the old way of doing things, he adds.

A good example of the implementation of the 'simplifying the business' programme is Kuala Lumpur International Airport (KLIA), says Bruyere, adding that it has implemented the programme's five projects. Information technology specialist SITA is one of the main suppliers of the technology to KLIA.

Bruyere says: "Malaysia Airports and MAS put in a great effort at KLIA to showcase the suite of projects comprising 'simplifying the business'."

KLIA has "self-service check-in

kiosks, bag-drop counters and 100% bar coded boarding passes. It also has self-boarding in place for MAS domestic passengers" and it went live on e-freight a week ago.

"So really MAS and Malaysia Airports have taken the lead role and it is the very first time we are showcasing at the AGM the 'simplifying the business' programme both from a customer point of view and also, here at the Mandarin Oriental Hotel, the focus for the airlines."

While Malaysia Airports (MAB) has been investing in new technology, it has also been upgrading airport infrastructure the year," Malaysia Airports managing director Bashir Ahmad tells *Airline Business Daily*.

"Redevelopment of Kuching and Kota Kinabalu airports are in the final stages" and "both airports will be able to handle Boeing 747s once the runway works are completed," he says.

"Kuching airport's terminal can now handle 5.3 million passengers a year and Kota Kinabalu's terminal once completed will have a capacity of 9 million passengers per annum," he says, referring to the two main international airports in East Malaysia.

It is also upgrading another airport in East Malaysia at Labuan and the work is almost completed, he says, adding that the upgrade means it can handle Airbus A330s and the terminal's capacity is increasing to two million passengers per annum.

In the Peninsula, Malaysia Airports has just opened a new passenger terminal at Malacca airport



Self check-in uses passport data

around the country.

The main airport on the Malaysian island of Penang "is undergoing upgrading works at the parking bays and taxiways and there are plans for the extension and upgrading of the terminal, at a cost of 250 million ringgit (\$71 million), which is expected to take off by the end of and extended the runway to support Boeing 737s whereas before it could only handle Fokker 50s.

Kuala Terengganu airport, meanwhile, has a new passenger terminal and a runway extension is underway so it can handle Boeing 747s. It is expected to be completed by 2010, he adds. ■



BY MARK PILLING

celand's economy may be in a tailspin, but flag carrier Icelandair is alive and kicking and doing its bit to help revive this island nation, says the carrier's CEO Birkir Gudnason.

Speaking here at his first AGM, Gudnason says that the carrier has moved quickly to strip out costs, revamp its product and switch its sales focus from its home market to North America and Europe. "I spend six to seven times more on foreign advertising than the Icelandic Tourist Board does. Around 90% of our ads are about promoting Iceland, not ourselves," he says.

Since he joined in May, Gudnason has overseen dramatic changes at Icelandair. These started as the carrier reacted to falling markets a year ago but accelerated when Iceland's banks went into



Goodnason: Selling Iceland

meltdown in October.

The home market crashed with traffic down by 60%. This led the carrier to slash capacity by 25% over the winter and focus heavily on selling Iceland as a destination and selling Reykjavik as a transit hub between North America and Europe, says Gudnason. Today its traffic is now 50% inbound, 30% transatlantic and only 20% from the home market, he says. The ratios used to be equal.

Iceland is open for business

"We went through the winter without any loans or additional funds from the banks and solely with our own cash. We are hoping we can do this next winter as well," says Gudnason.

The changes at Icelandair include laying off 380 staff, leaving the airline with a workforce of 1,300; cutting senior management positions; and the number of cabin crew on its Boeing 757 fleet from five to four, he says. With bookings for the peak summer months looking solid, Gudnason is forecasting that the carrier will return to profit this year. "The only thing that can ruin the year is the fourth quarter," he says.

Icelandair will operate all 11 of its 757s this summer including on a new route between Seattle and Reykjavik from 22 July. It announced this route just three weeks after SAS revealed it was pulling its route from the US city to Copenhagen.

"This is the first time we have taken over an established route," says Gudnason. The carrier has been looking at this route for a decade and will aim to transfer travellers to Scandinavia through its Reykjavik hub.

Navtech is emerging from a major revamp



Fight operations software and services provider Navtech is emerging from a revamp under the leadership of new chief executive Mike Hulley.

Hulley, who was formerly with Delta, United, Galileo and IBM, has been working on a 100-day plan since he took charge in February. Navtech, which competes with market leader Jeppesen and rival number two Lufthansa's Lido, has five business areas: Aircraft performance; charts; crew scheduling; flight planning; and navigational data.

Privately-owned Navtech has a \$50 million turnover and about 10% market share in some areas. Hulley says: "There is plenty of room for growth. We will be working very hard over the next two years to increase our market space substantially. We are very profitable and are doing very well at eliminating redundancy in our product lines."

Navtech acquired European Aeronautical Group in 2005. Part of Hulley's remit has been to phase out the EAG name, unifying the company's operations under the Navtech brand while consolidating its four corporate websites into one. "The rebrand and single site will clear up a lot of confusion."

He is also rolling out newly designed 'best of breed' products, removing duplicate products in each of its five business areas – a hangover from when Navtech and EAG were independent.

"We are probably 75% done," says Hulley. "We have almost finished our 100-day plan. By July everything will be re-launched."

Navtech has 200 airline customers, including BA, SAS, Qantas and Air Canada.



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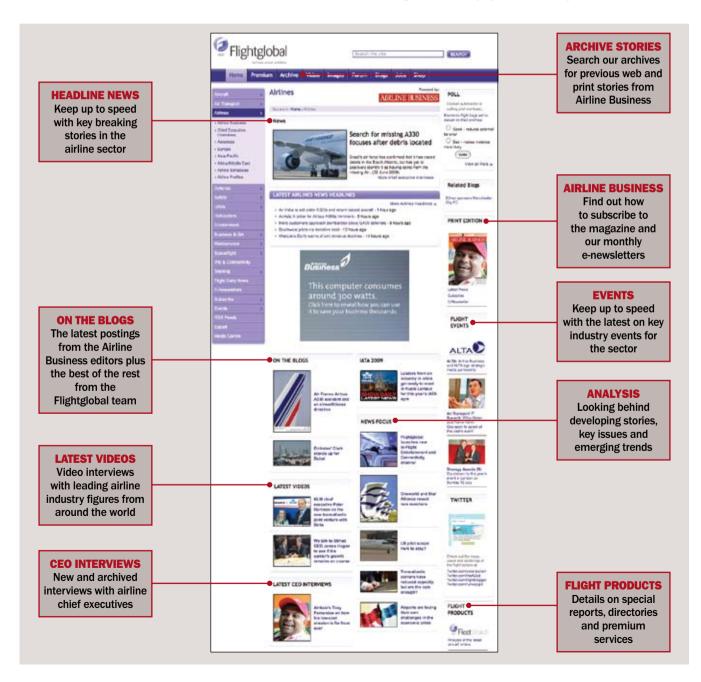
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Peering into the gloom - Giovanni Bisignani

Brace... brace... brace!

With traffic and yields still heading south, IATA will today further downgrade its forecast for this year from the \$4.7 billion loss it predicted in March, the association's director general Giovanni Bisignani told Airline Business Daily ahead of today's AGM

BY MARK PILLING

We may start to see a recovery in freight in the second half, but for the passenger recovery we will have to wait for next year." he says.

With IATA's latest figures for Q1 showing a steep 35-40% fall in premium revenues it is inevitable that the industry will suffer greater losses than previously expected. "One look at the falling yields and we know there will be downgrading [of the financial forecast]," says Bisignani.

IATA's latest forecast puts the revenue decline this year at 12%, or \$60 billion, compared to a 7% fall after the 2001 terror attacks.

Predicting how fast the recovery will run is a tough call. "Looking at history - and reviewing what happened after 9/11 - it took three years [for the industry to recover]," he says. But the industry is structurally different this time around. "The industry is stronger in terms of internal efficiency so it doesn't mean

it will take the same time," he says. One bright spot is China, where a national stimulus package has helped boost the economy and kept traffic growing in recent months, says Bisignani (see related story in the first issue of the

Airline Business Daily, p8). At last year's AGM in Istanbul. Bisignani had stern words for governments and monopoly suppliers for not doing enough to assist the industry. IATA's main request is to allow airlines to operate much more freely, particularly getting rid of the bilateral air services regime. "When we ask a simple question some are still struggling to find a way forward," he says.

However, the countries making up IATA's Agenda for Freedom, which brings together 14 forward looking governments as well as the European Commission, is showing "some positive signs" when it comes to moves on liberalisation.

"At the technical level we are

seeing a lot of support. Now we are trying to translate this up into political support," says Bisignani. In particular he sees some optimistic signs in the new US administration.

When it comes to suppliers, "there are people who get it, but I have to shout louder. There is still a group of people living in the old times," he says. Airports in this region that have made major con-

"Now we are in economic meltdown and in survival mode."

tributions include Singapore Changi which has reduced airport charges by 25% and KLIA that has chopped them by 50%.

Bisignani recalls the words of Delta's Leo Mullin and JAL's Isao Kaneko, shortly after he took over IATA's reins. "They told me the worst is over!" he exclaims.

"When we started to see a bit of

blue skies along came SARS - the second shock," he says. That was in 2003. Then last year the price of fuel skyrocketed to more than \$140 a barrel with some forecasters saying it could go even higher. "\$200 a barrel would have been a catastrophe. We can handle increases in fuel when there is an increasing economy," he explains.

However, fuel prices reduced as the recession began to bite. But this crisis is different because the effects are global. "In the past the crisis was localised but the difference was a growing economy and we recovered very quickly," says Bisignani. "Now we are in economic meltdown and in survival mode."

And even though he is a selfconfessed optimist, Bisignani is also realistic. "Where are the numbers that are positive?" he asks. "Yields and traffic are still going down."

Something that has perplexed him is the recent rise in fuel prices from the \$40 a barrel mark to nearly \$70. "Fuel is increasing on an optimism that is not related to the numbers. The last thing carriers need is fuel at \$70."

IATA was tasked with ensuring the risks to carriers of banking failures was minimised after the 2008 AGM in Istanbul. In the second half of 2008 it also did a careful examination "stress testing those airlines at risk around the world". It has contingency plans in place if a major carrier does fail, but these have not been needed vet, he says.

"We have seen many small and medium-sized carriers go out of business," says Bisignani. The last one suspended from the BSP was West African carrier Air Senegal, which ceased operations in late April.

Larger carriers have been bracing themselves against the recession by bolstering their balance sheets. "Their cash position in this last period is not so desperately bad," says Bisignani. "There have been a lot of sales and leasebacks [of aircraft] for example as airlines prepare themselves for a tough winter. The problem is what will happen in the fall. Let's hope this [market] optimism gets translated into numbers."

••• Continued from page 1

and translate that hope into action by innovating, trimming capacity, cutting non-value-adding costs and keeping yields in check: "Dog-eatdog is a very, very dangerous thing." Jala also believes "long and deep" consolidation will be key to industry recovery. Hope, action, 'Malaysian hospitality' and teamwork are his buzz words.

Under Jala's leadership MAS has undergone a major turnaround. He savs: "We want to become the Tovota of the airline industry - not the Mercedes and not the Lada either. We need to keep on the bandwagon of reducing costs." Over the last three years, Jala has slashed 2.3 billion ringgit from the airline's overheads, or around 15% of its cost base. This year his goal is another 700 million to 1 billion in savings, helping position MAS as a "five

star value carrier". But he says: "You can't just create a slogan like that without saying what you are going to do about implementing it."

On the revenue side, Jala is rolling out customer-focused innovation tors and revenues.

such as a stimulus package of nine fare deals aimed at specific target markets. But he recognises this strategy must be underpinned by low costs. He talks about good and bad costs. Bad costs that do not directly add to safety or customer service should be eliminated. Good costs are all about finding the "sweet spot" between cost and customer satisfaction, so both sides win.

With the first stage of the business turnaround plan (BTP) completed, Jala is now working on a second phase: BTP2. He says this has not been significantly impacted by the downturn: "It was written with the philosophy of assuming the worst and planning for the best, so we painted a worst case scenario that looks like now. We assumed the downturn would happen around 2012, but it is happening now, so we have compressed the timeline. Essentially the document was spot on."

Fundamental to Jala's strategy is understanding the customer, their profile, demographics and behaviour patterns. For example, MAS has tailored its in-flight catering on a route-by-route basis after finding several cases where passengers preferred a cheaper alternative. But he adds: "To find the sweet spot, you cannot standardise - it is based on customer needs for that particular route."

Despite initial concerns about cannibalising its own customer base, MAS is offering cheap, nonflexible fares 30 days before departure to broaden market reach. Jala says: "I believe we can learn from supermarkets that sell products nearing their expiry date, cheaply. In terms of segmentation, we are trying to address the

market that has

traditionally be-

longed to low-

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the financial challenges he is facing: "It is going to be tough, but I am confident we are going to survive. We will put in 110% effort to make sure we are [profitable]." He urges IATA members to pool their resources and keep the industry's cyclical nature in mind - especially in relatively good times - by avoiding unbridled growth.

But some things cannot be controlled. Jala says the last of his six business turn-around principles is divine intervention. "More than 60% of things are beyond our control. There is no certainty you can achieve what you want to achieve. Do the best you can do, and if you are a spiritual person, pray for it. And when it doesn't work because of things beyond your control, don't shoot the troops."

Networking



Members of IATA's governing board met this weekend ahead of the World Air Trans Mayrhuber (Lufthansa), Tony Tyler (Cathay Pacific Airways), Fernando Conte (Iberi (Japan Airlines), Front row: Choon Seng Chew (Singapore Airlines), Christoph Fran Bisignani (IATA), Fernando Pinto (TAP - Air Portugal), Temel Kotil (Turkish Airways)



g at the AGM



port Summit and AGM. Back row: Tawfik Assy (Egyptair), Khalid Al-Molhim (Saudi Arabian Airlines), Wolfgang a), Titus Naikuni (Kenya Airways), Gerard Arpey (American Airlines), Yang Ho Cho (Korean Air) & Haruka Nishimatsu z (Swiss International Airlines), Willie Walsh (British Airways), Samer Majali (Royal Jordanian Airlines), Giovanni), Naresh Goyal (Jet Airways) & Dato' Sri Idris Jala (Malaysia Airlines).

IATA SAYS THANK YOU

Sanjay Bhuckory, former chairman of Air Mauritius, is presented with a souvenir photograph in recognition of his time spent on IATA's board of governors from the association's director general Giovanni Bisignani.

The photograph shows Bhuckory with his fellow board members taken at the IATA AGM in Istanbul last year.

Bhuckory, who stepped down from his position at the carrier in January, served on IATA's board in 2007-8. He also served as president of the African Airlines Association between 2006 and 2007.





Seen at the AGM: Guido Ruther, (left), vice-president of Royal Jordanian at a oneworld gathering, and Mohamed Sallauddin (far right), general manager marketing of Malaysia Airports and Mike Berman, consultant to Malaysia Airports, in the exhibition area.

SOUND BITE



ROB FYFE AIR NEW ZEALAND CHIEF EXECUTIVE

Those that have been in the airline industry a while know the nature of the business is you never know what's around the corner. The airlines that cope will be the ones that are able to adapt their business - and adapt at speed. That's the nature of survival in this industry. It doesn't matter if it's SARS, 9/11, bird 'flu, swine 'flu, economic crisis or fuel crisis; there's always something around the corner to grapple with. It's about moving your business at speed. Some airlines are really good at doing that and some really struggle.

I certainly think this cycle will have a long, long run to it. We don't see any recovery in the near-term. We think there's a three to five year period of sustained challenge here. The thing that destroys value in this industry is surplus capacity, which is there because of government subsidies and because of funds coming into the industry other than on a commercial and economic basis. Unless we can solve that and free up some of the competitive constraints, I think this industry is destined to struggle from crisis to crisis. 77

OUT AND ABOUT

Kuala Lumpur is a first class destination, with plenty of sights to take in. While you're here, why not take some time out to visit some of the city's attractions? Victoria Moores proposes 10 suggestions, to give you a taster of this fascinating city

Alaysia's capital Kuala Lumpur (KL) is a vibrant, dynamic and colourful city that first appeared on the map in the mid-1800s. Its status as the country's largest city - and the youngest capital in Southeast Asia - is reflected by the mix of old colonial-style buildings and modern skyscrapers.

ICONIC ARCHITECTURE

At 452m (1,483ft) the **Petronas towers** (KLCC) (*pictured*) are the tallest twin buildings in the world. The octagonal structures, opened in 1998, have 88-storeys and although the public can't visit the top, you can take a free 10-minute tour of the 41st floor double-decker Skybridge (170m above street level). Time-allocated tickets are issued from 08:30 on a first-come, first-served basis.



BIRD'S-EYE

VIEW While the Petronas twin towers score points for architecture, you get the best

views of the city from the observation deck at the **KL tower**. At 421m, it's a telecommunications hub and - thanks to its hilltop location – it appears taller than the twin towers. At one point it was claimed to house the world's highest McDonald's but if you're after something a little more upmarket, its revolving restaurant provides diners with stunning city views.

HUSTLE BUSTLE

If you're on the lookout for gifts, crafts, art work and souvenirs, visit **Central Market** in China town. Housed in an air-conditioned art deco building, the market's along Jalan Hang Kasturi, a few minutes away from Petaling Street. Classified as a heritage site, it's a landmark for Malaysian culture, packed with a wide variety of national arts and crafts.



Heighten your senses with a stroll through China town, based around

Petaling

Street. Take an evening stroll through the hive of vibrant activity which has an array of colourful sights, stalls and restaurants. It's also a great place to haggle and to sample local fruit and food.

LOCAL TASTES

Check out our previous blog on must-try local cuisine at *www. flightglobal.com/IATA09thingstoeat.* Other recommendations include **Restoran Rebung**, owned by a celebrity TV chef and Malaysia's first astronaut. This vibrantly decorated eatery does very good Malay food and is set in a house in Bangsar, one of KL's most popular bar and restaurant areas.

KL TAKE-AWAY

For a real taste of local street food, head to one of the many bustling



evening **hawker markets**. Hang out with the locals on rickety chairs and tables and sample some very affordable dishes. The recommended ones are around **Jalan Alor** (renowned for Chinese dishes); **Bangsar Baru hawker stalls** (good mix); **Jalan Masjid India** (mainly from the sub-continent) and **Merdeka Square**, just behind St Mary's cathedral, (a wide variety of Asian food).

BACK TO NATURE

For something a little different, how about a trip to the spectacular limestone **Batu Caves**? Discovered in the 1890s and situated seven miles north of Kuala Lumpur, this series of caves and cave temples is a sacred place for Malaysia's hindus. But if you are feeling a little jaded after the conference, be warned! You need to climb 272 steep steps to access the main temple cave. Prepare for a little simian attention too as there is a large local monkey population.

SERENITY

Try visiting some of the local mosques and temples. Must sees include the **Masjid Jamek mosque**, a beautiful pink and cream brick building that's set in a grove of palm trees on the banks of the Klang and Gombak rivers. You may also fancy visiting the **Sri Mahamariaman temple** which, built in 1873, is the oldest hindu temple in the country.

LAST-MINUTE SHOPPING

For that last-minute gift before heading home, KL has some huge shopping malls packed with wellknown global chain and designer stores. Try visiting the **Mid-valley Megamall** or **Berjaya Times Square**. For electrical goods, such

square. For electrical goods, such as computers and laptops, head either to Plaza Low Yat or Imbi Plaza located in the Golden Triangle.

