

AIRLINE BUSINESS DAILY

BRINGING YOU THE NEWS FROM THE ALTA LATIN AMERICAN AND CARIBBEAN AIRLINE LEADERS FORUM AT CANCUN

ALTA flags safety as critical issue

The Latin and Caribbean region needs to raise safety levels to those found in Europe and the USA

A key theme of the 2007 ALTA Airline Leaders Forum will be airline safety, said ALTA executive director Alex de Gunten.

“Although as an industry we have dramatically improved our safety record in the last few years, we are still behind Europe and the USA. This concerns us a lot,” he



Alex de Gunten

said. The Forum will focus on safety issues with several announcements expected.

ALTA has been working closely with IATA on safety. This has featured a drive to implement the IATA Operational Safety Audit among ALTA carriers and the creation of the Partners for AirLine Safety Program. “We have been working extremely hard with members to take on board the IOSA standards – we expect 90% of our members to meet IOSA by year-end,” said de Gunten. “We will also encourage a push to follow up the IOSA initiative,” he said. “We need a strong commitment and incentive to reduce this safety gap.” In related news, Avianca and its subsidiary Sam have renewed their IOSA certification. ■



Welcome to Cancun

This year’s **Latin American Airline Leaders Forum**, being held for the second year here in one of Mexico’s most popular destinations, **Cancun**, is once again the place to come for the **highest level access** to the region’s **air transport leaders**. Held at the Fiesta Americana Grand Coral Beach hotel and **hosted by ALTA**, it will attract some 35 Chief Executives from **Latin and Caribbean** carriers, as well as senior government and industry figures such as IATA director general Giovanni Bisignani and Steve Udvar-Hazy, the founder and head of lessor ILFC.

Caribbean ministers draw up Single Sky plan

BY MARY KIRBY

The vision of a single air traffic control system for the Caribbean received a major boost in October with several countries agreeing to take the first steps by September 2008.

A lack of regional co-operation has long been the Achilles Heel of the Caribbean air transport industry. Fierce competition among island nations has created a landscape where carriers limp from

one financial crisis to another. But efforts are now afoot by government leaders to restructure the sector, both on a regulatory and operational front, in hopes of finally implementing lasting change.

One of the most significant steps taken in recent years to address fragmentation in the region occurred on 19 October in San Juan, Puerto Rico when Caribbean transport and tourism ministers –

who are members of the Caribbean Tourism Organization – committed to intensify efforts towards the creation of a single regional airspace within sub-regional groupings such as Caricom (Caribbean Community) by 30 September 2008. They also agreed to extend this airspace to the wider Caribbean, where feasible.

At present there is no common air traffic control entity in the Caribbean. Rather, ATC services are

handled by a complex network that includes the US FAA covering Miami and New York Oceanic, Jamaica, the Dominican Republic, Trinidad and Tobago’s Piarco center, Curacao, Venezuela, Suriname, Cuba, Mexico and the Central American air traffic authority Cocesna. Each air navigation service provider has its own training

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Varig roars back to life

Brazil's famous flag carrier is rebuilding its route network, writes Mark Pilling

By the end of 2008 rejuvenated Varig is aiming to be operating to 14 cities in Brazil and to 13 international destinations in Europe, Latin and North America with over 200 daily flights, said Constantino de Oliveira Junior, the chief executive of Varig and its parent company Gol.

Gol's parent acquired VRG Linhas Aereas – which operates the Varig brand – in April this year and set about overhauling the operation and restoring the carrier's international network which had been reduced to a single link to Frankfurt after Varig's collapse in the summer of 2006.

Varig began flying to Paris and Rome in early October and restarted flights to London on 29 October. Services to Madrid, Santiago in Chile and the Uruguayan capital Montevideo will all start by year-end. A service to Mexico City resumed on 5 November while flights to Miami and New York are planned to begin in the first quar-



ter of 2008, said de Oliveira.

It has been achieving loads of around 60% on its European routes with the strong take-up mainly down to the Varig brand, despite the airline's problems. "It

is like a football team: sometimes the team is not doing so well but people still support them," he said, adding that Varig is expected to break even in the third quarter of 2008. ■

ALTA on the campaign trail

Ongoing efforts to wage war against high airport charges, encourage joint efforts between carriers to reduce costs, and establish a strong events programme have all been features of ALTA's work schedule this year.

The airport campaign, which was a part of the 2006 Leaders Forum as ALTA and IATA tackled the high charges at Argentina's airports, is showing early results, said Alex de Gunten, ALTA head. For example, a compromise on charges was reached in Argentina earlier this year, although the deal has yet to be implemented, and negotiations have been opened with the authorities in Peru. "We've been very vocal, but progress is slow," said de Gunten.

ALTA has working groups in the fields of fuel, maintenance operations and distribution seeking ways to collectively lower costs. One project is looking at airlines sharing maintenance tools in different locations rather than each carrier investing in their own.

Apart from this Forum, ALTA now has two other events in its annual calendar. The CCMA Latin America and Caribbean Airlines Suppliers meeting took place in May in Brazil while ALTA held its first Aviation Law and Legal conference in September.

ALTA's membership is at a record high with 39 airlines. This is up from just 17 four years ago. New additions to the association include Aerolineas Argentinas and Caribbean Airlines. ■

Rosy outlook for Latin carriers

The latest traffic data from ALTA shows the region's carriers have been outpacing those in every other region over the past few months. In 2007 Latin traffic has restored its growth pattern now that the "Varig effect" has gone. Last year the collapse of the

large Brazilian carrier hit the industry's performance as a whole.

Other Brazilian players like Gol and TAM have picked up a lot of Varig's routes, and the brand under the new ownership of Gol is reinstating some of its international network (*see related story above*).

"Growth for ALTA members has been strong and will continue to be strong into 2008," said Alex de Gunten, executive director of ALTA, with many Latin economies performing well with consistent GDP growth and inflation at 40-year lows. "The big question is the price of fuel."

In August, ALTA members saw traffic rise by 7.6%, although capacity rose substantially more by 16.4% causing a 5.4% drop in load factors to 68.7%. In the year to August, traffic rose by 4.1%.

The region's largest carrier by revenue is now Brazil's TAM, according to the latest World Airline Rankings published by *Airline Business*. In 2006 TAM had annual revenues of \$3.3 billion, closely followed by Chile's LAN with revenues of \$3 billion. ■

AIRLINE BUSINESS DAILY

PUBLISHED BY AIRLINE BUSINESS WITH AEROCOMM

DAILY editorial team

Kerry Ezard
Mark Pilling
Geoff Thomas

Design & production

Andrea Crisp

Photographer

Tom Gordon

Advertisement sales

Robert Hancock
Shawn Buck

Printed by

Pixel Press, Cancun

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AWARDS DINNER

One of the highlights of the Forum is the annual ALTA Awards dinner. This takes place on Thursday evening and features the Federico Bloch Award and the Rolim Amaro Awards, sponsored by Embraer and TAM respectively.

The master of ceremonies is Spencer Stuart managing director Michael Bell.

Brazil remains key alliance target

The global alliances will have to wait a while before securing their Brazilian partners, writes David Field

Although the global airline alliances are keen to secure a Brazilian member, the country's main players – TAM and Varig/Gol – are forging bilateral relationships with a variety of partners rather than seeking to join oneworld, SkyTeam or Star, at least for now.

When Varig's financial collapse led Star to drop it, the largest alliance vowed rapid progress to replace the once legendary Brazilian carrier and regain coverage in the region. However, none of the global alliances has made a major move in the region. Instead, devel-

opments have been in small steps.

While TAM chief executive Marco Antonio Bologna concedes his carrier is closer to Star than any other alliance, it is striking deals with airlines from all alliances and will keep them whichever alliance it joins. It has codeshares with Air France and LAN for example.

At Varig the emphasis is on restoring interline links with various carriers in the first place as it rebuilds its international network. "We will do that as a first step, then follow with codeshares. After that we will be able to discuss whether we can be part of one of the alliances or not," said Constantino de Oliveira Junior, chief executive of Varig.

Brazilian low-cost player Gol

has moved to align itself with SkyTeam's Continental Airlines in a pact that allows the Houston-based carrier to sell seats on all of Gol's routes. Gol has also signed separate bilateral pacts with SkyTeam's Air France and KLM.

Without a member in the region, Star has the weakest market penetration. Oneworld has a strong member in the shape of LAN, while SkyTeam has Aeromexico and Panama's Copa is an associate member.

For now Star is relying on tighter bilateral links between its members and Latin carriers to boost its market coverage. TAM has new codeshares with Star carriers TAP Air Portugal and United. Lufthansa has also signed a pact with TAM as well as TACA. ■



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ALTA AIRLINE LEADERS FORUM

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... Dress for the conference is business casual

Wednesday, November 7

- 10:00 – 5:00pm** **Exhibitor Set Up** [Grand Ballroom Foyer]
- 12:00 – 7:00pm** **Registration** Fiesta Americana Foyer [Special Registration Area]
- 7:00 – 9:30pm** **Welcome Reception** "A Taste of Mexico" [Sunset Terrace, outside]
Reception sponsored by Airbus
Entertainment sponsored by Abogados Sierra y Vazquez

Thursday, November 8

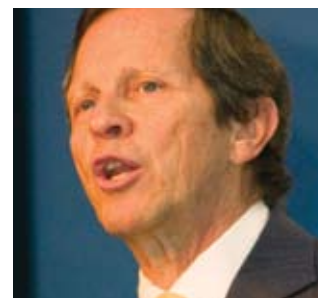
- 7:00 – 9:00am** **Morning Registration** [Grand Ballroom Foyer]
- 8:30** **Exhibit Area opens** [Grand Ballroom Foyer]
Chief Executive Meeting Room sponsored by Willis Lease
- 9:00 – 9:40** **Official Opening** Presentations ALTA Executive Director Alex de Gunten
 - ALTA President and Copa Airlines Chief Executive Pedro Heilbron
 - Mexico Minister of Communications and Transport Luis Tellez
 - CLAC President Eustacio Fabrega
- 9:40 – 10:20** **IATA Director General** Giovanni Bisignani
Key Challenges of the Airline Industry
- 10:20 – 10:45** **Coffee Break** Sponsored by Unisys
- 10:45 – 11:15** **The importance of the Industry to Trade**
Former Deputy US Trade Representative Ambassador Karan Bhatia
- 11.15 – 11.45** **Airlines: A Wall Street Perspective**
Merril Lynch Senior Analyst Mike Linenberg
- 11:45 – 12.15** **Good and Bad Trends in the Latin American Aircraft Market**
ILFC Chief Executive Steven Udvar-Hazy
- 12:30 – 2:00** **Lunch** Keynote Speaker: Aeromexico Chief Executive Andrés Conesa
Sponsored by Lufthansa Systems
- 2:10 – 3:20** **The New Role of the Caribbean Carriers**
Moderator: *Airline Business* Editor Mark Pilling
 - LIAT Chief Executive Mark Darby
 - Caribbean Airlines Chief Executive Phillip Saunders
 - Bahamasair Chief Executive Henry Woods
 - Cubana de Aviacion Chief Executive Arturo Bada
- 3:20 – 3:40** **Coffee Break** Sponsored by Unisys
- 3:40 – 4:30** **The Southwest Effect in Latin America**
 - Moderator: AvGroup Chairman Bobby Booth
 - Volaris Chief Executive Enrique Beltranena
 - Spirit Airlines Chief Executive Ben Balanza
 - ALMA Chief Executive Guillermo Heredia
- 4:30 – 5:00** **The New Aviation Market in Brazil**
TAM Chief Executive Marco Antonio Bologna
- 7:00 – 8:00** **Cocktail Reception** [Grand Ballroom Foyer]
Sponsored by SITA
- 8:00 – 10:00** **ALTA Awards Dinner**
Master of Ceremonies Spencer Stuart Managing Director Michael Bell
Dinner sponsored by GECAS
 - The Federico Bloch Award sponsored by Embraer



Pedro Heilbron



Marco Antonio Bologna



Giovanni Bisignani



Mark Darby

- The Rolim Amaro Award sponsored by TAM
- Dress Code: business/evening

Friday, November 9

9:00 – 10:00

New Distribution Models

- Moderator: Mexicana Chief Information Officer Santiago Ontañon
- Amadeus Director of Airline Sales Europe, Middle East, Africa and Latin America Arnaud Debuchy
 - SITA Vice-President Latin America Olivier Layly
 - Sabre Senior Vice-President Latin America Kamal Qatato
 - UATP Chief Executive Ralph Kaiser

10:00 – 10:20

Quantifying the Economic impact of Air Transport in the Region

IATA Vice-President Latin America and Caribbean Patricio Sepulveda

10:20 – 11:00

Coffee Break *Sponsored by Snecma Services*

11.00 – 12.30

Regional Safety Issues

- Moderator: ALTA Executive Director Alex de Gunten
- Marsh Ltd Senior Vice-President Safety and Security Aviation Practice George Snyder
 - FAA Assistant Administrator for International Aviation James Filippatos
 - Airline panel
 - IATA Senior Vice-President Safety, Operations and Infrastructure Guenther Matschnigg
 - LAN Chief Executive Enrique Cueto

12:30 – 2:00

Lunch *Keynote Speaker – Mexicana de Aviacion Chairman of the Board Gaston Azcarraga* *Sponsored by Boeing*

2:10 – 2:55

US Perspective Panel

- Moderator: Air Canada Former President and Chief Executive Pierre Jeannot
- Continental Airlines Vice-President Latin America Pete Garcia
 - United Airlines Vice-President Latin America Josué Meza
 - Frontier Airlines Director Planning Matthias Barbieri

3:00 – 3:25

Life after Chapter 11

- Avianca Chief Executive Fabio Villegas

3:25 – 3:45

Coffee Break *Sponsored by World Fuel Services*

3:45 – 4:45

Working with Government

- Grupo TACA Chairman Roberto Kriete
- Mexico Civil Aviation Director Capt Gilberto López Meyer
- Aerolíneas Argentinas Chief Executive Esteban Maccari

4:45 – 5:00

Closing Remarks

ALTA Executive Director Alex de Gunten

ALTA Announcement

6:00 – 7:00

Cocktail Reception [Sunrise Beach] *Sponsored by AIG*

7:00 – 9:00

ALTA Beach Fiesta [Sunrise Beach]

- Dress Code: casual (no shoes required)
- Beach Fiesta sponsored by Volaris*
- Entertainment sponsored by Lufthansa Technik*

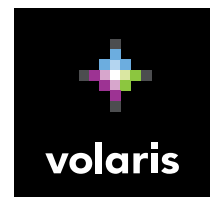
Remarks

The ALTA Airline Leaders Forum Agenda is subject to change. Designated areas marked with brackets [].

•••• The general dress code for the Conference is Business Casual with the exception of the Awards Dinner which is Business/Evening.



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Caribbean ministers draw up Single Sky plan

Story continued from cover

practices and timelines for upgrading equipment, leading to duplication and high costs.

IATA says the so-called San Juan Accord brokered by the CTO ministers shows a new-found willingness of many of the region's governments to create a Single Caribbean Sky that could provide annual cost savings of up to \$100 million; create easier, shorter routings; and improve safety.

"A lot of countries have gotten a bit of a wake-up call that the competition globally for tourism dollars is pretty intense ... so I think what we saw in San Juan is a realisation that we need to move faster and move ahead with these initiatives," says IATA.

For a long period of time, the Caribbean "kept talking about open skies but the notion of having a single Caribbean airspace is really what we are talking about and that obviously would be facilitated enormously by having a common civil aviation regime", says Vincent Vanderpool Wallace, CTO secretary general and former director general of the Bahamas Ministry of Tourism.

"The next part of that – which is so critical to all of the development of the Caribbean – is having many more efficient hubs into some key areas located in the Caribbean because, frankly, if we



begin to look at the Caribbean area as a single space with these hubs to feed a number of individual destinations instead of continuing to look at the Caribbean as our individual destination or country airspace, we find that it becomes enormously more efficient and we think it augers quite well to what we want to do in the future."

Liberalising air services in the Caribbean was, however, on the ministers' agenda in San Juan. To that end, they agreed to establish a CTO-wide umbrella policy for air transport within the framework of the Association of Caribbean

States' existing Air Transport Agreement, which, when fully ratified, promises to offer rights just shy of those provided in a full multilateral agreement. The ministers also pledged to work towards further liberalisation of air service agreements with key international partners such as the European Union and the USA.

It is with these tools that the Caribbean believes it can resuscitate a struggling air transport industry that has seen state-owned flag carriers such as Air Jamaica and Caribbean Airlines' predecessor BWIA West Indies Airways

flounder under frequent management shakeups, and in the latter instance, fail.

Financial losses at regional carriers have also been steep, recently prompting two long-time rivals, Liat and Caribbean Star Airlines, to agree a deal that sees the Antiguan incumbent acquire Caribbean Star's assets.

Most telling, perhaps, that the Caribbean landscape is in need of dramatic change came when Liat chairman Jean Holder called the transaction "one of the most significant business deals in the history of the Caribbean". ■

All change for Aeromexico and Mexicana

Mexico's two air transport titans, Aeromexico and Mexicana, will arrive at this year's Latin American Airline Leaders Forum in an altered state: the former with a new owner and the latter with a new chief executive. Also in an altered state is the Mexicana domestic market, which has undergone a transformation following an influx of new low-cost carriers.

Almost two years after accept-

ing an offer of \$165.5 million for Mexicana from hotel chain operator Grupo Posadas, the Mexican government agreed to sell its majority stake in Aeromexico to a consortium led by Banamex for \$249 million. Grupo Posadas had also submitted a bid, but was prevented from proceeding by Mexico's competition commission.

In July, Mexicana named its chief financial officer, Manuel

Borja Chico, as its new chief executive, replacing Emilio Romano, who had led the carrier through its post-acquisition restructuring. With these changes now in place, Aeromexico and Mexicana will no doubt be turning their attention to regaining domestic market share from the raft of low-cost start-ups which began entering the Mexican market in 2005. These new carriers include Avolar, ALMA, Inter-

jet, VivaAeroBus and Volaris.

As the conference unfolds it will be interesting to see what strategies Aeromexico and Mexicana will follow to compete with each other, as well as with the fast-growing low-cost carriers that have sprung up around them. Aeromexico chief executive Andres Conesa and Mexicana chairman Gaston Azcarraga are both making keynote speeches at the Forum. ■

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Airline ownership: time to open up

The region's most successful carriers in recent times have been publicly owned, but there are worrying trends in the reverse direction, writes David Knibb



Rafael A. Rojas S. / BAIRE Aviation Photography

Uruguay's Pluna has been sold into private hands

It's the ownership, stupid!" is one of those Boothisms that everyone in Latin aviation knows. It is a shorthand phrase, coined by veteran Latin commentator and consultant Bobby Booth, to say that an airline's ownership has much to do with its success.

Consider one of Latin America's most successful airlines. Ten years ago, privately held LANChile listed on the stock exchange and started making public offerings. It soon discovered the positive tradeoff between the transparency and discipline required by public markets and the access they gave to global capital. How else could LAN recently have ordered 32 Boeing 787s – the largest order in Latin American history?

Brazil's Gol and TAM and Panama's Copa followed suit, listing on local and overseas exchanges, and thereby gaining access to the large chunks of capital they needed for growth. Grupo Marsans is planning a public listing for Aerolíneas Argentinas, and others may follow this example.

But against this trend, we see several developments that point

the other way. Military airlines are still flying throughout Latin America, even after all the commercial flag carriers were privatised. They serve remote communities that often lack commercial flights. Commercial and military airlines clash only when their networks start to overlap. Last year this led to the demise of air force-operated TANS Peru.

RIVALRY

Two Latin nations have taken a broader view about government air carriers – embracing state-owned airlines that are not military. When Venezuela launched Conviasa in 2004, it promised not to compete with Venezuela's commercial carriers. History has proven otherwise. Not only has the government taken routes away from other airlines and given them to Conviasa, but Conviasa enjoys government-backed finance while its private rivals face long delays for state approval to buy aircraft.

Bolivia is now following Venezuela's example. Early next year it plans to launch its own state-owned airline, Boliviana de

Aviación (BoA). The government says it will not compete with private carriers, but its route plans suggest otherwise.

The second worrisome trend is a growing preference for closely held instead of publicly held airlines. This is not limited to the leftist regimes in Venezuela and Bolivia, but is widespread.

When Uruguay's government decided to sell majority control of Pluna, it did not list Pluna's shares or launch a public offering. Instead, it invited private bids and sold the airline in July to Leadgate, a group of private investors.

The Mexican government did the same thing when it privatised Mexicana in 2005. Cintra sold its majority stake to Grupo Posadas. Majority control of Mexicana has been privately held ever since. Now Mexico has settled for a similar arrangement with Aeromexico. Mexico's entire crop of low-cost carriers are all privately held.

The most striking example of this tilt away from public ownership is the debate disclosed in September within the Constantino family over whether to take Gol off the public markets. According to

local reports, Gol's founder and chairman, Nene Constantino, finds the corporate governance demands of a listed company "too cumbersome". His son, Constantino Oliveira Jr, Gol's Chief Executive, is not so sure. The issue should be resolved by year end.

PUBLIC MARKETS

Preferring state-owned airlines, privatising government carriers, launching startups with privately held capital, and buying back the shares of publicly held carriers to take them private, all show an aversion to the openness required by public markets.

Latin American airports are littered with the carcasses of airlines whose owners were unwilling to relinquish control and operate by the standards of international capital markets, and because of that they also lacked access to the capital needed to survive in such a capital-intensive industry.

Publicly owned airlines tend to attract and retain higher quality executives. Latin America has had some fortunate exceptions, but family-owned airlines generally are run by "yes-men" who are willing to do the family's bidding.

Bobby Booth is right. The ownership of an airline has everything to do with its success, and these recent ownership trends in Latin America are a cause for concern. ■

ABOUT THE AUTHOR



David Knibb is a senior correspondent for *Airline Business*, where he has

been writing for almost 20 years. He has covered Latin American aviation since 1996. A former commercial lawyer and part-time law school professor, Knibb says his big interests are competition issues in the airline industry and aeropolitics.

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