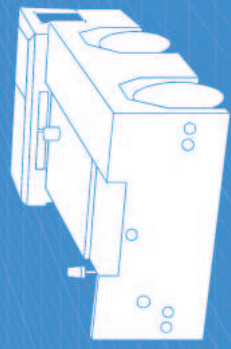
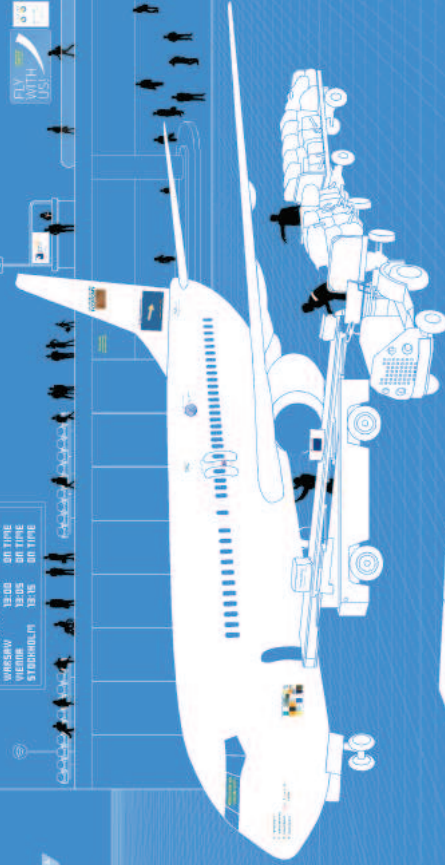
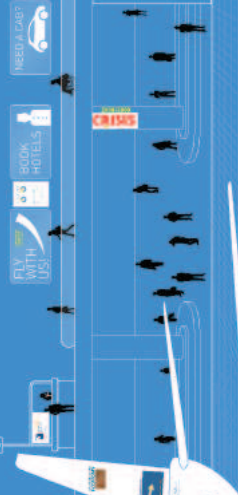
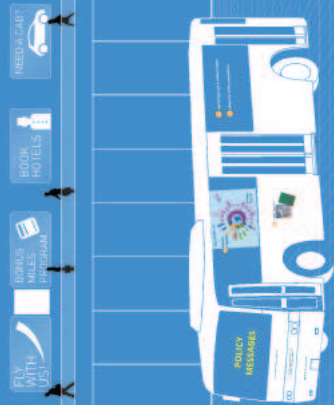


EVERY FLIGHT BEGINS AT THE AIRPORT.

DEPARTURES		
BRUSSELS	12:25	BOARDING
MADRID	14:35	BOARDING
PARIS	15:00	ON TIME
PRAGUE	15:50	ON TIME
WARSAW	18:00	ON TIME
VIEANA	18:20	ON TIME
ZURICH	18:35	ON TIME

BUEN VUEL **GO ZER FERA** **GÓRA FERA** **HYVÄÄ MATTHAI!** **HRANO TRAJIO!** **HA DOBRYE PLY!** **GOEDE REISI!** **BON VOYAGE!** **SAFE JOURNEYS!** **SUTEN FLUG!**



MERCI

www.aci-europe.org



**AIRPORTS COUNCIL
INTERNATIONAL**

**APPORTS DE LA CONCURRENCE:
CONNECTIVITE DIRECTE & INDIRECTE EN EUROPE**

Morgan Foulkes
Directeur Général Adjoint

Colloque DGAC-CSAC
Paris, 4 mai 2015

@ACI_EUROPE



THE GROWING IMPORTANCE OF AIR CONNECTIVITY

It's all about the ECONOMY



GLOBAL ECONOMIC SHIFT



Threats & Opportunities



Emerging markets

= +50% of World GDP

EUROPE

= increasingly dependent on external trade

AVIATION: enabler of Global Connectivity



+10% in air connectivity
= +0,5% in GDP

GLOBAL AVIATION NETWORKS RECONFIGURED

New, changing transport needs & aviation market opportunities



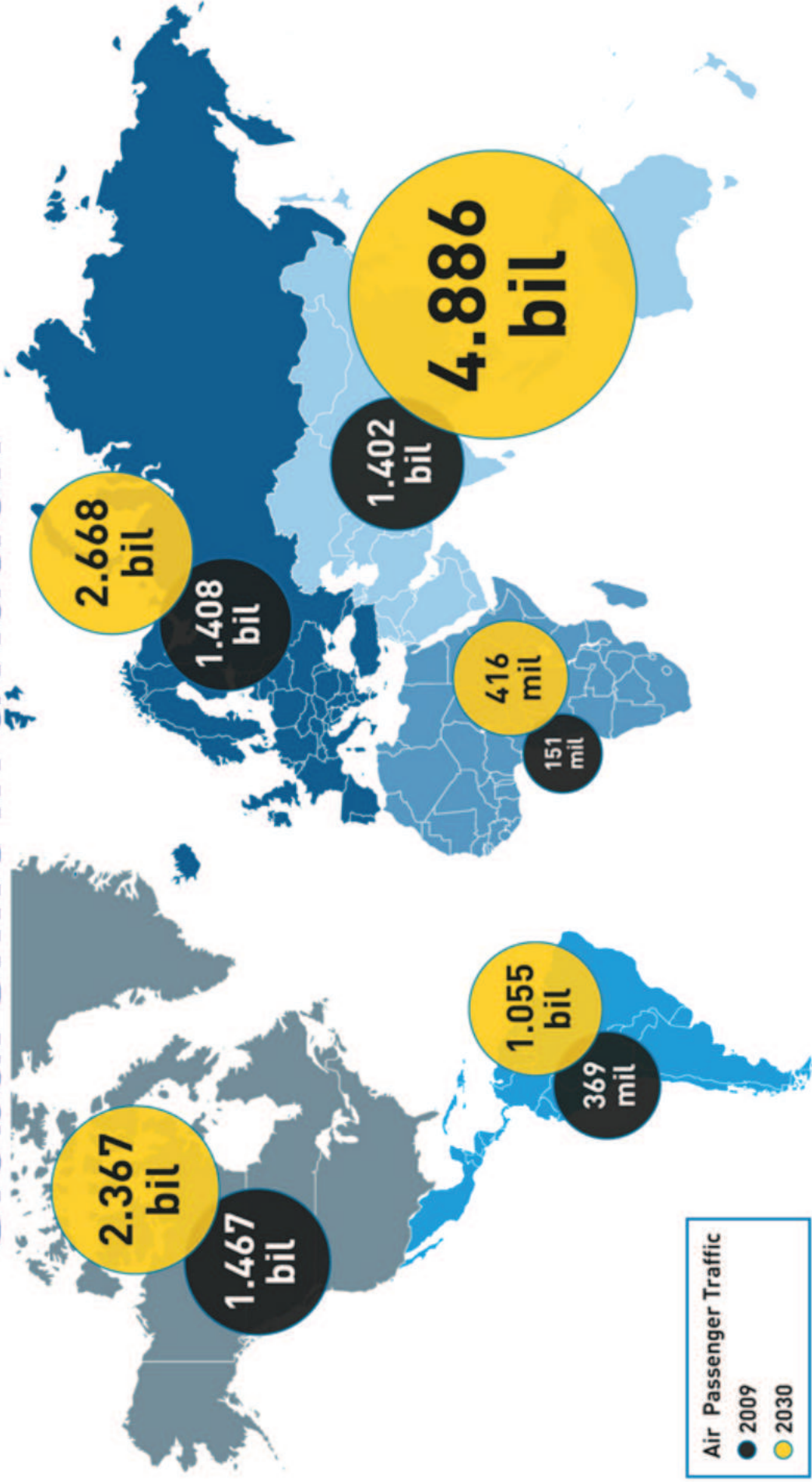
European market reaching maturity

2015-2035: +1,8%

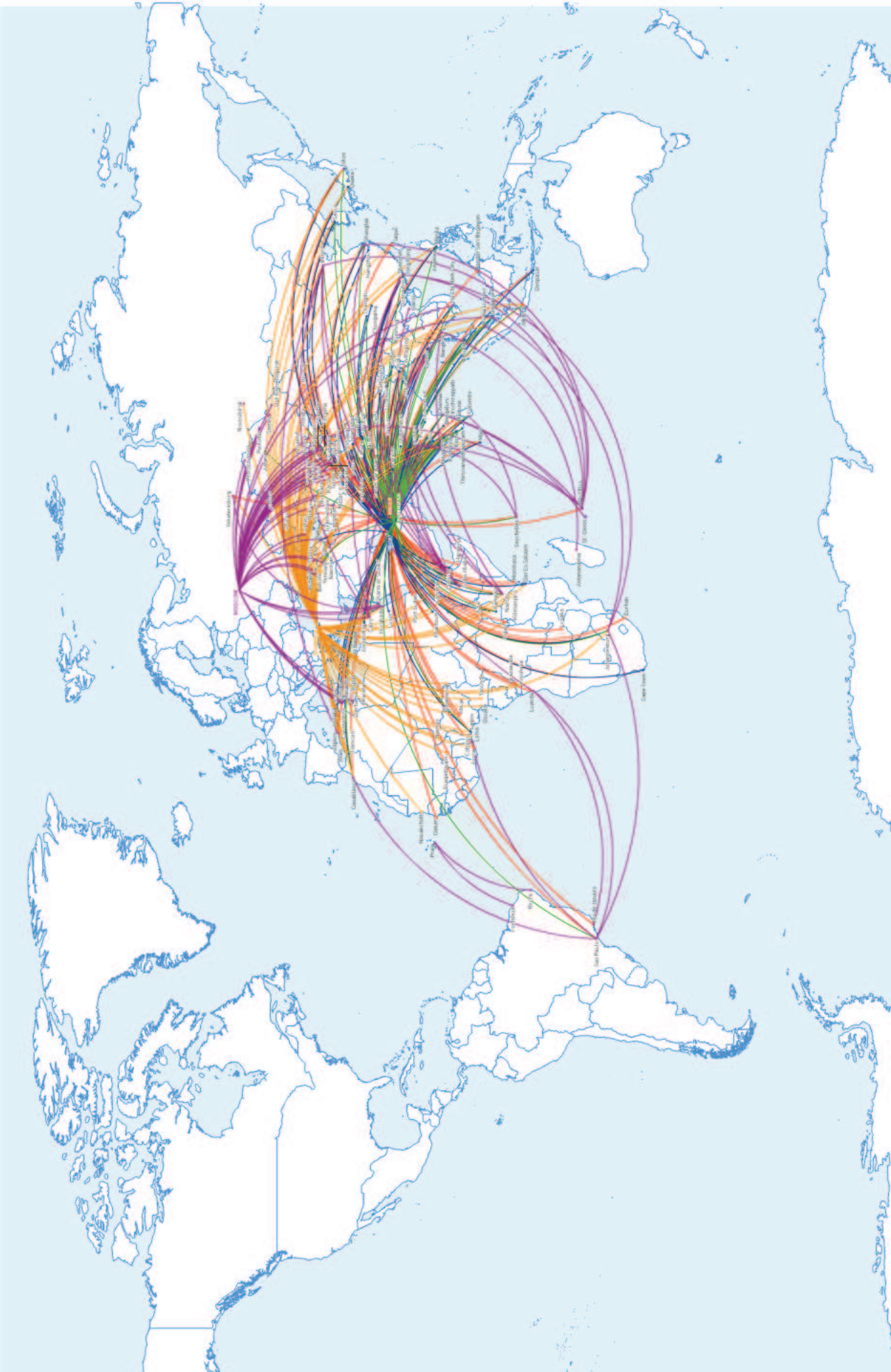
v. 1995-2015: **+3,6%**

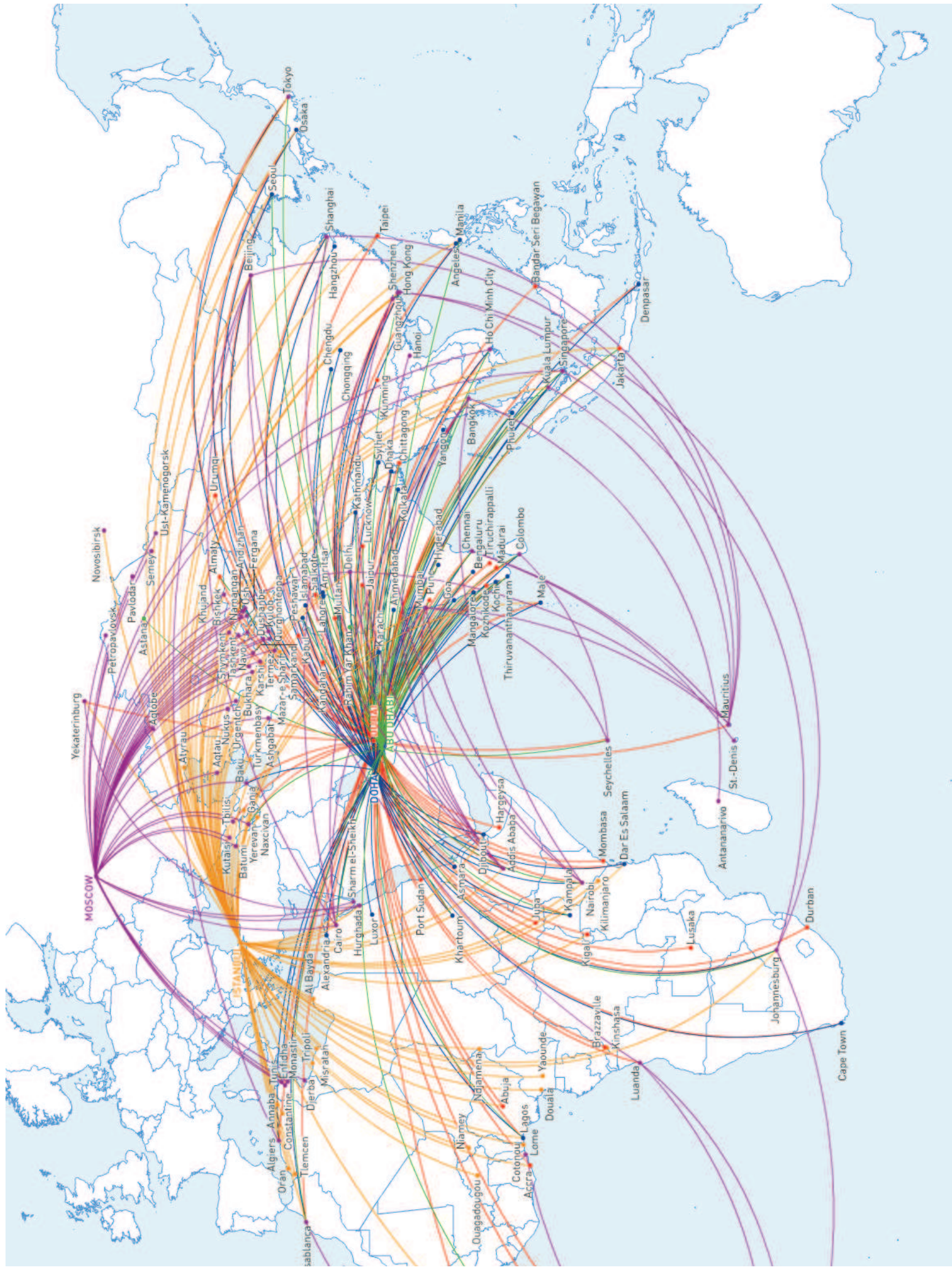


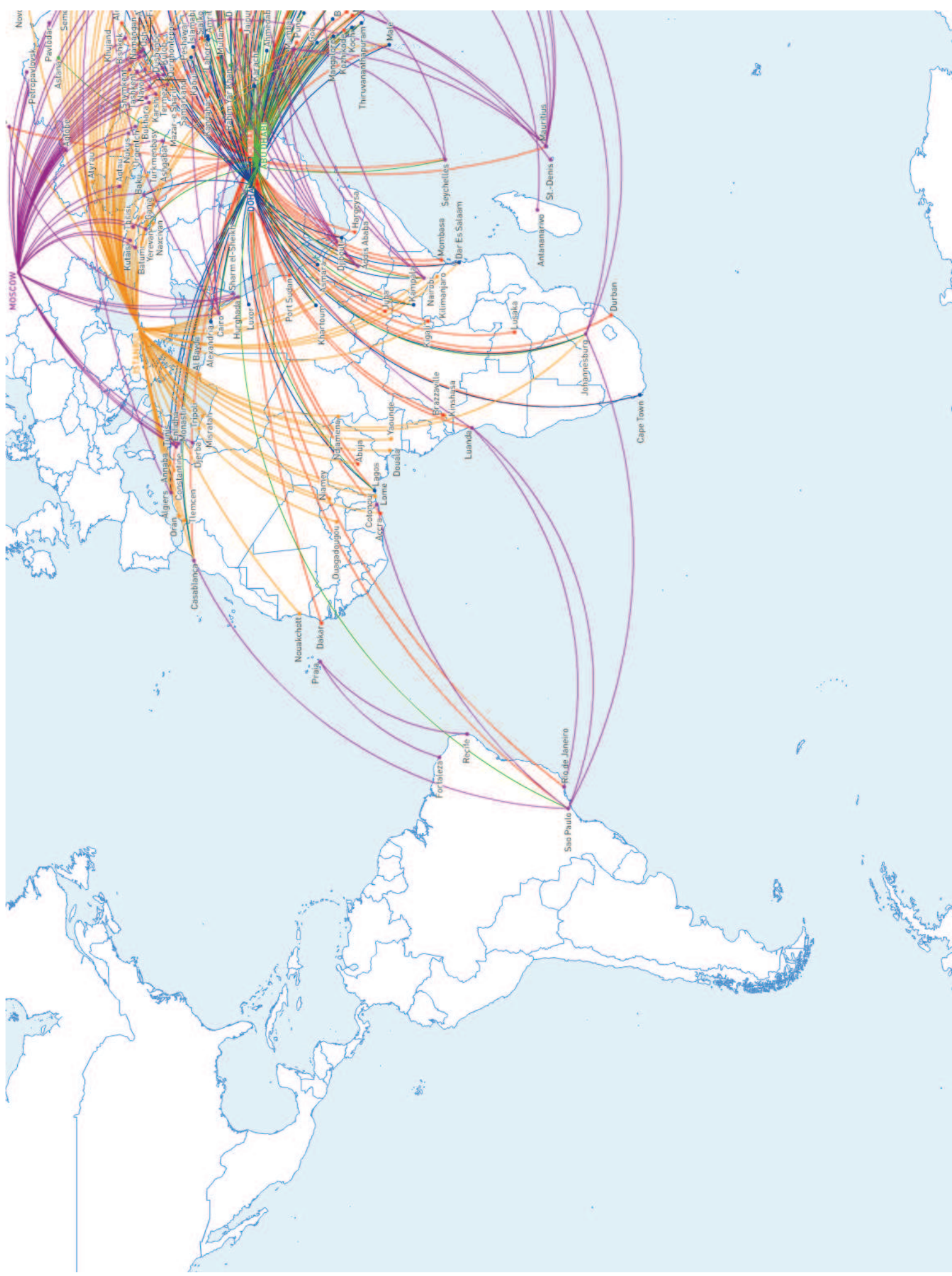
Global shift in aviation



The new Air Silk Roads



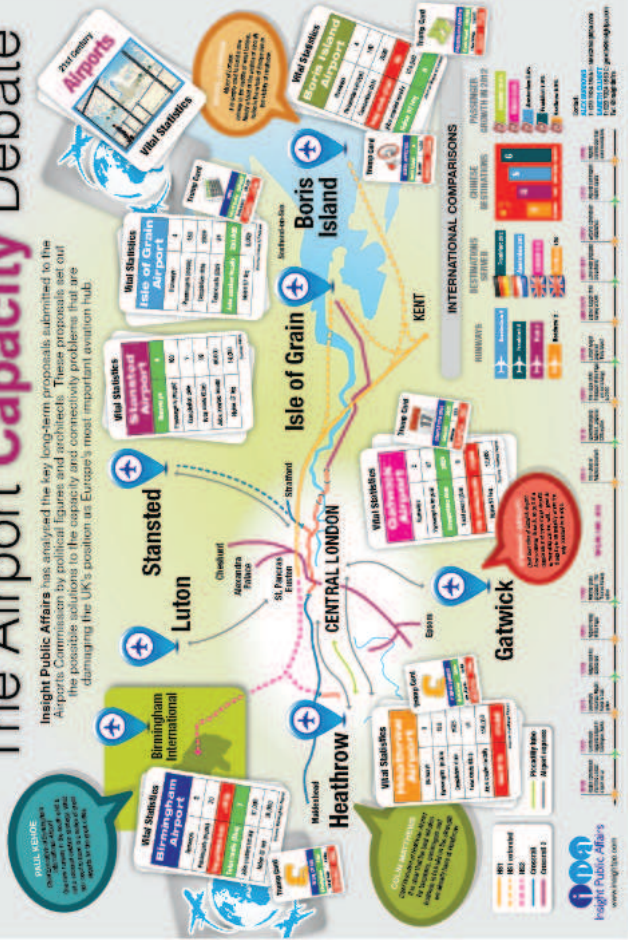




CONNECTIVITY & POLICY DEBATES

The Airport Capacity Debate

Insight Public Affairs has analysed the key long-term proposals submitted to the Airports Commission by political figures and architects. These proposals set out the possible solutions to the capacity and connectivity problems that are damaging the UK's position as Europe's most important aviation hub.



COMMISSION PRIORITY

Boosting Jobs, Growth and Investment

“My number one priority will be getting Europe growing again and getting people back to work.”



The Juncker Commission's top number of jobs without creating...
The Commission's Jobs, Growth... making smarter use of existing... – to provide up to €300 billion

**MEASURING AIR
CONNECTIVITY**



AIRPORT INDUSTRY CONNECTIVITY REPORT



WHY CONNECTERS MATTER

In partnership with
 aviation economists

2004 - 2014



Individual Airport



EU & Non-EU markets



National Markets



Airport categories

seo aviation economics

NetScan



AIRPORTS' BUSINESS TRANSFORMATION



Airport Competition & attracting new air services



Connectivity

= driver of business performance

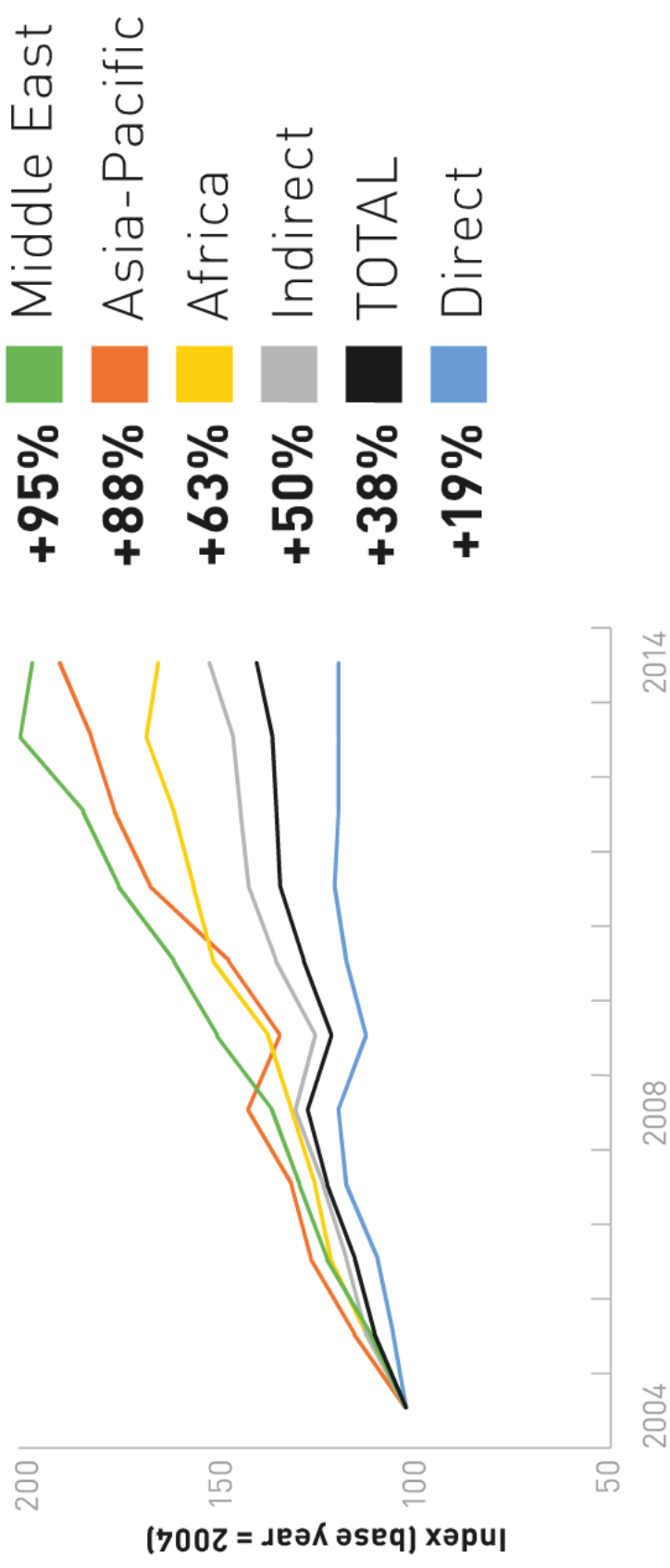


- Influence EU & National Policy



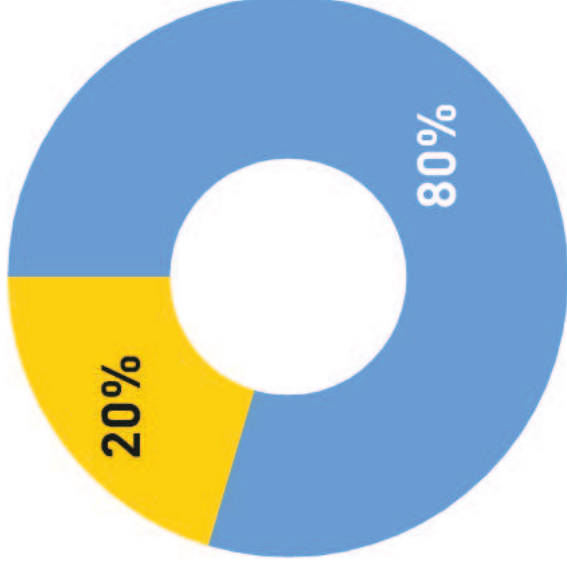
EUROPEAN AIR CONNECTIVITY AT A GLANCE

2004-2014: STRONG GAINS

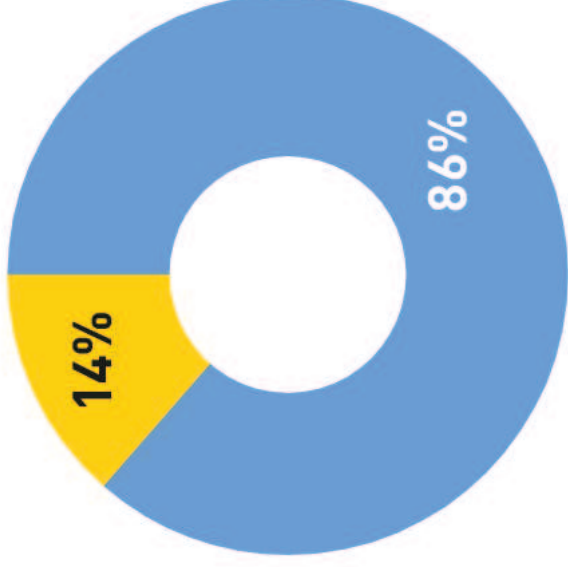


EU AIRPORTS = 80% of overall connectivity

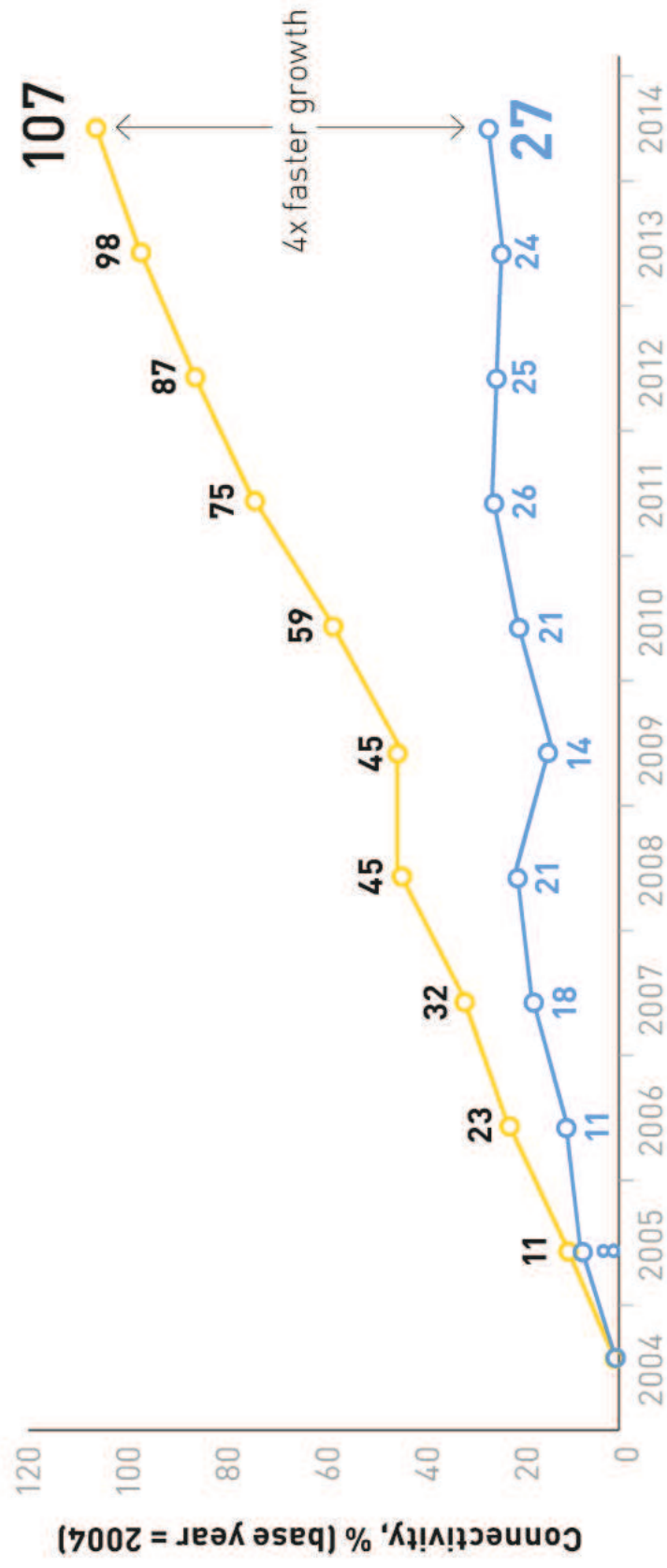
2014



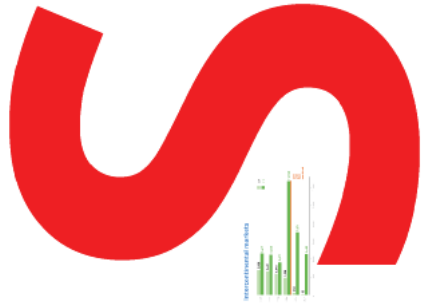
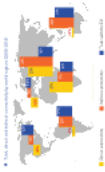
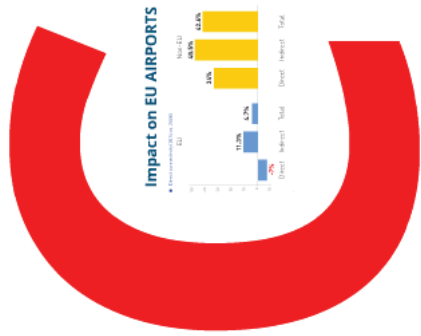
2004



NON-EU AIRPORTS growing faster

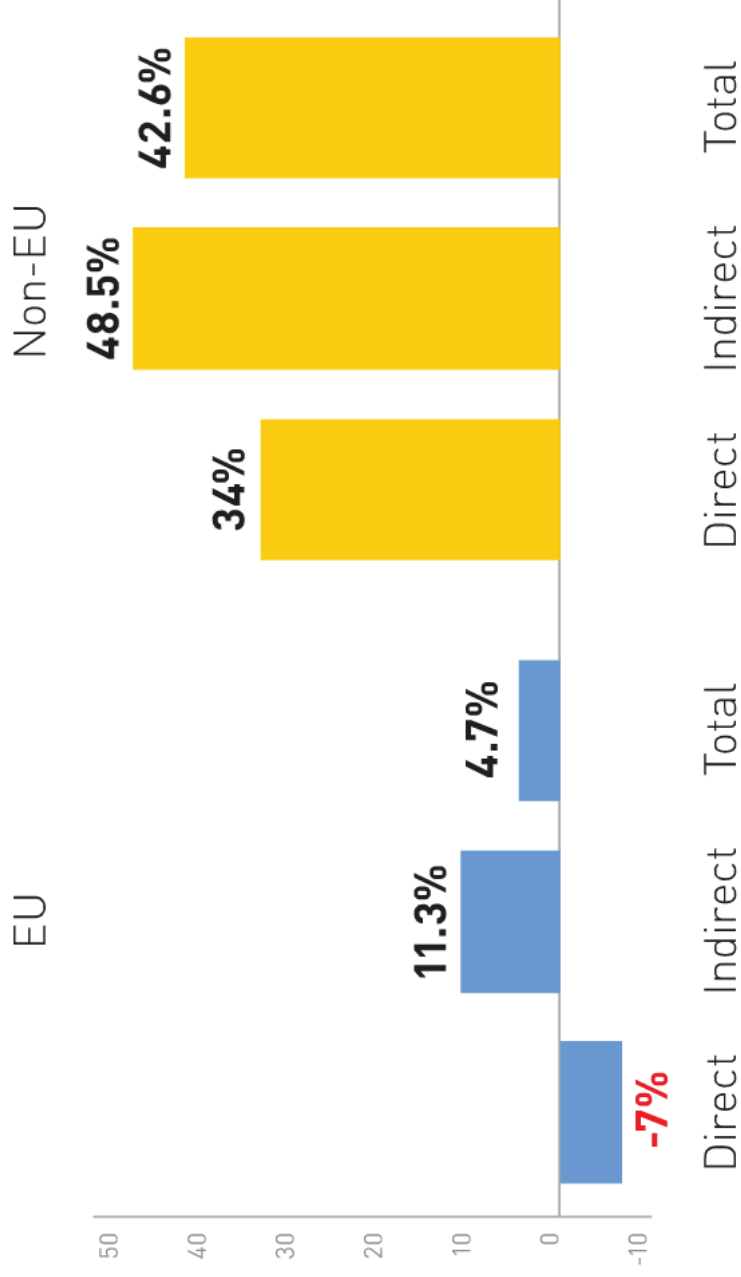


2008/2009

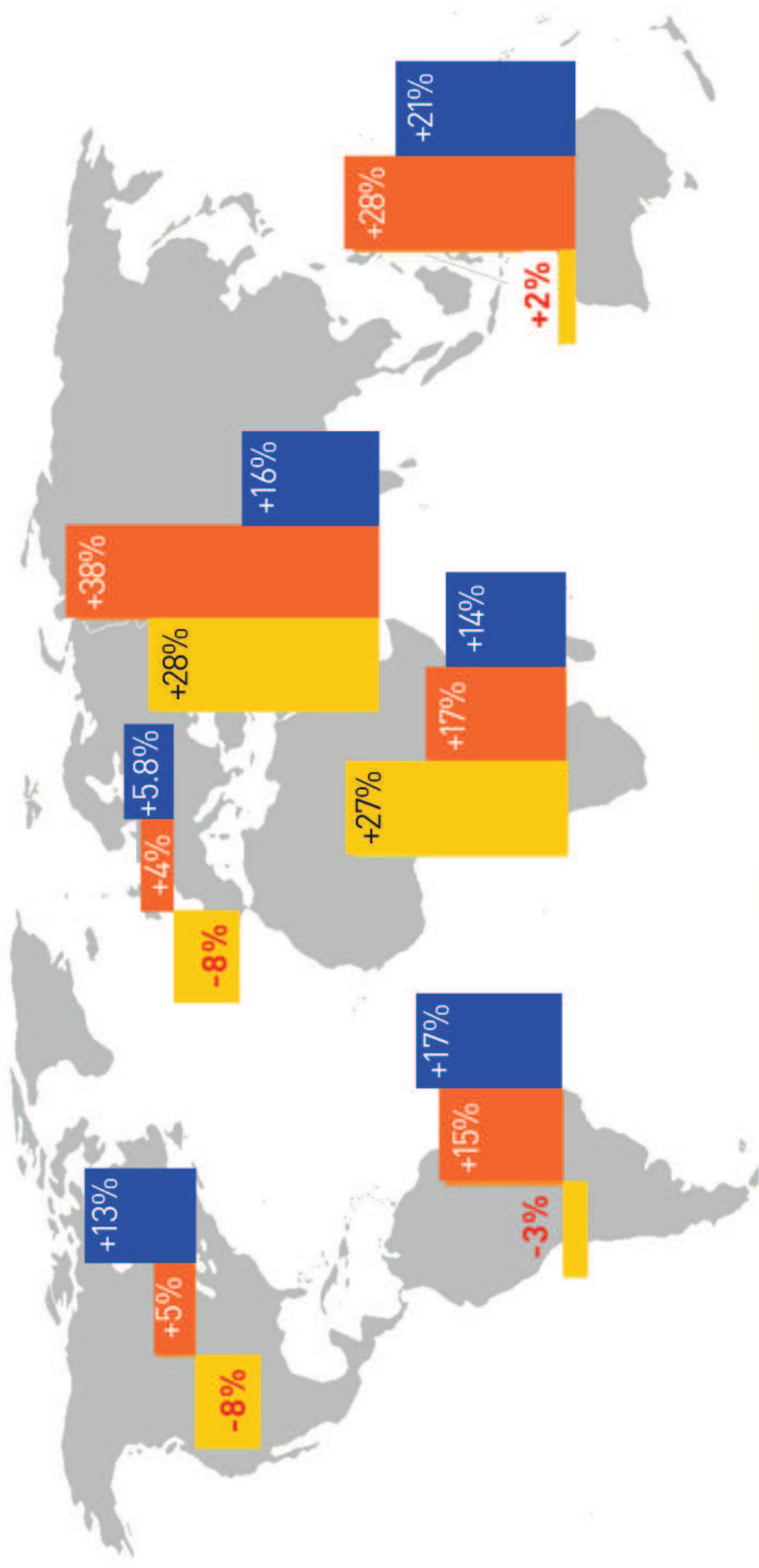


Impact on EU AIRPORTS

■ Direct connectivity (2014 vs. 2008)



■ Total, direct and indirect connectivity by world regions (2008-2014)¹

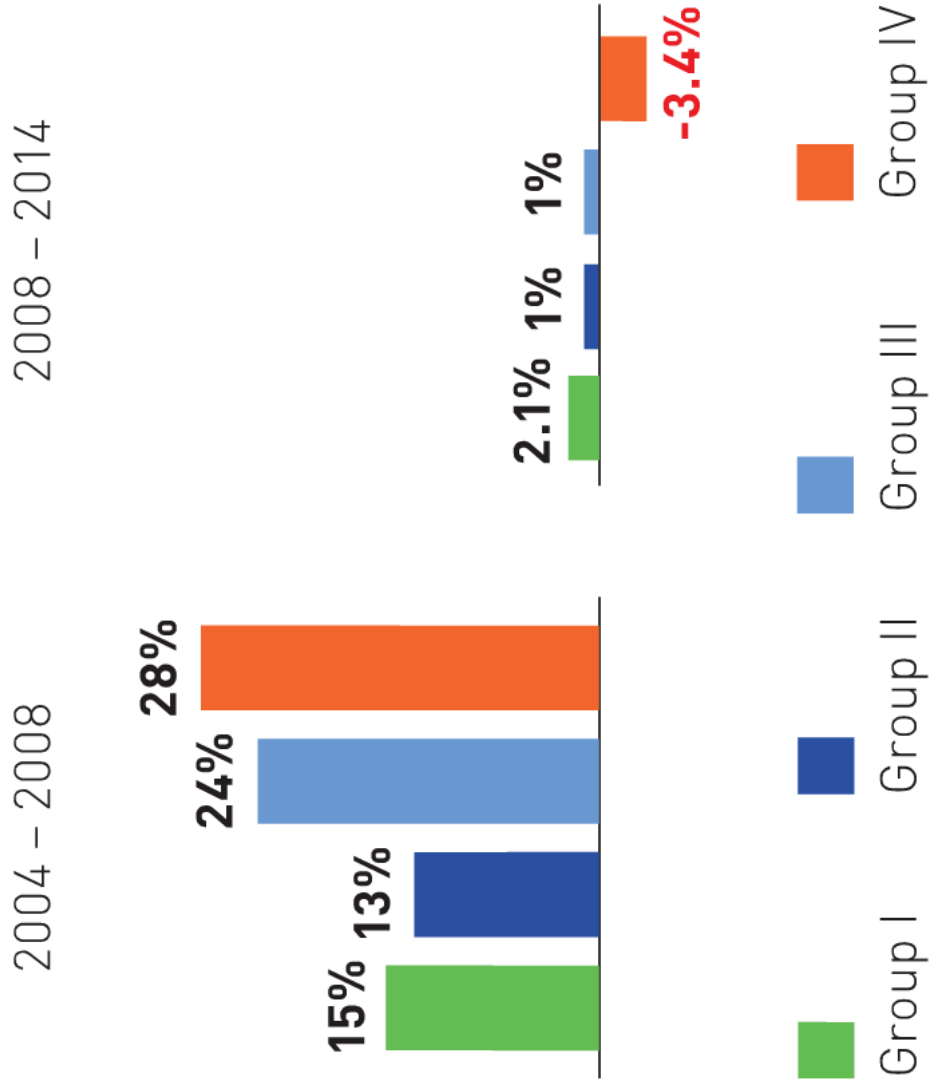


■ Direct connectivity

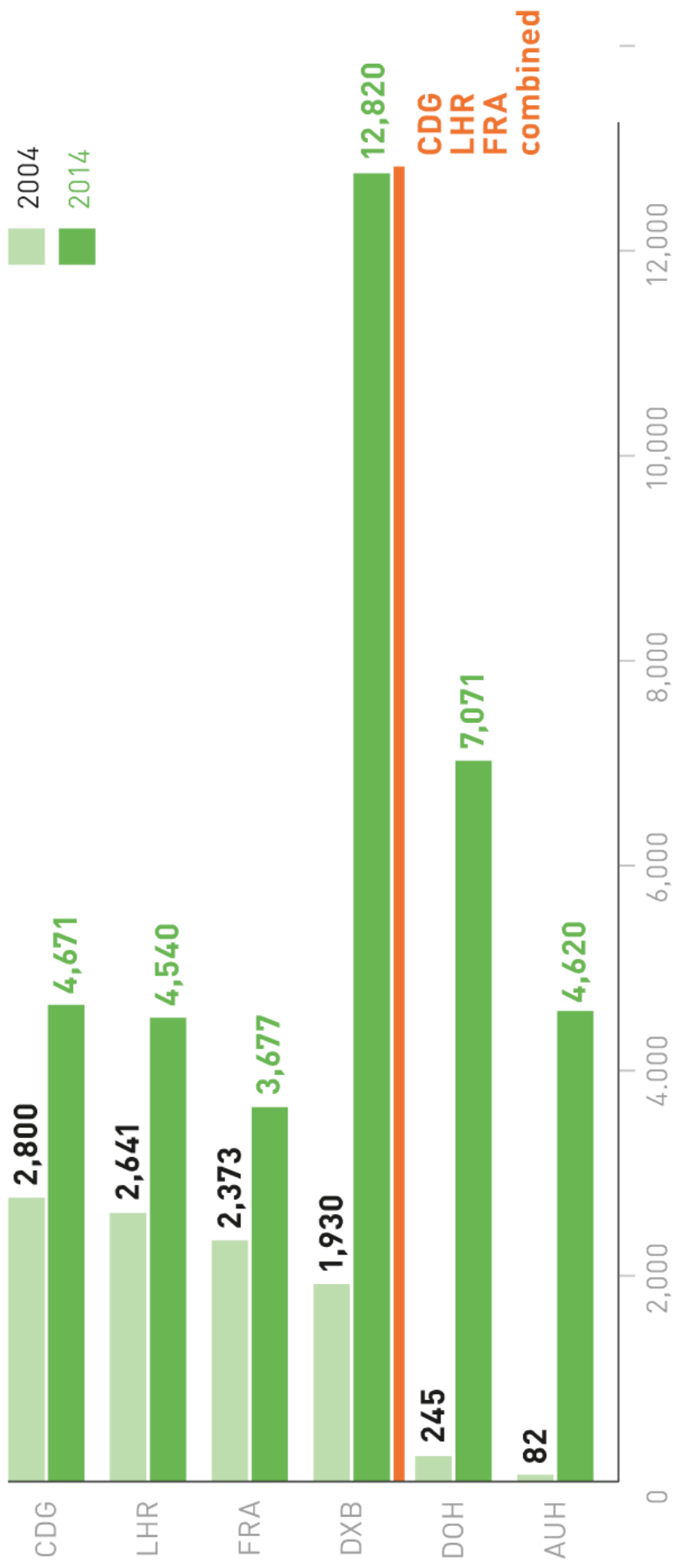
■ Indirect connectivity

■ Trade with the EU

Direct connectivity by airport group (2004-2014)



Intercontinental markets



POLICY MESSAGES



- Do not take connectivity for granted



- **Do not take connectivity for granted**

- **RISK:** Europe by-passed as an aviation hub
& provider of global connectivity

- **PUBLIC POLICIES & REGULATION**

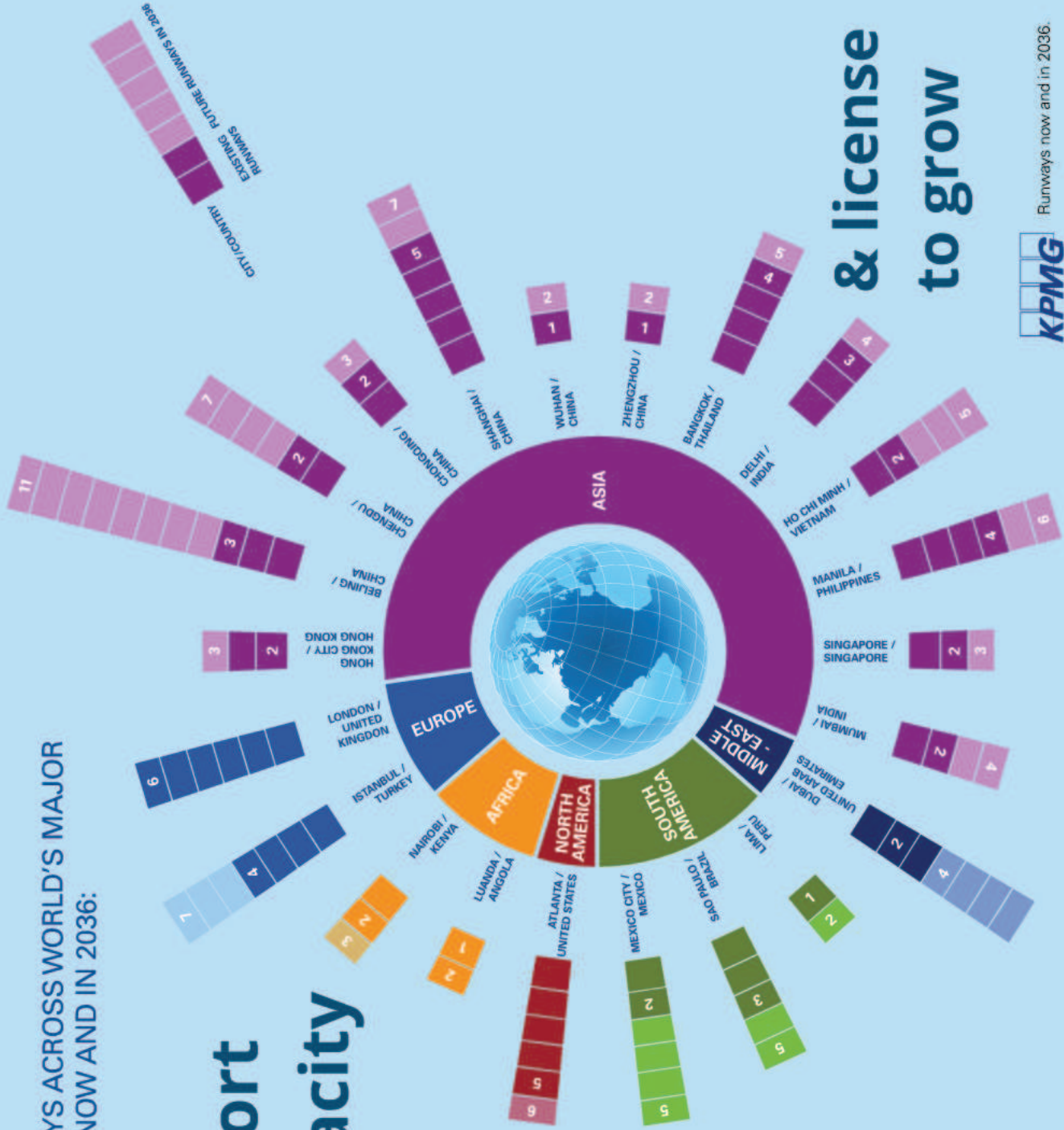
- PUBLIC POLICIES & REGULATION





RUNWAYS ACROSS WORLD'S MAJOR CITIES, NOW AND IN 2036:

Airport Capacity



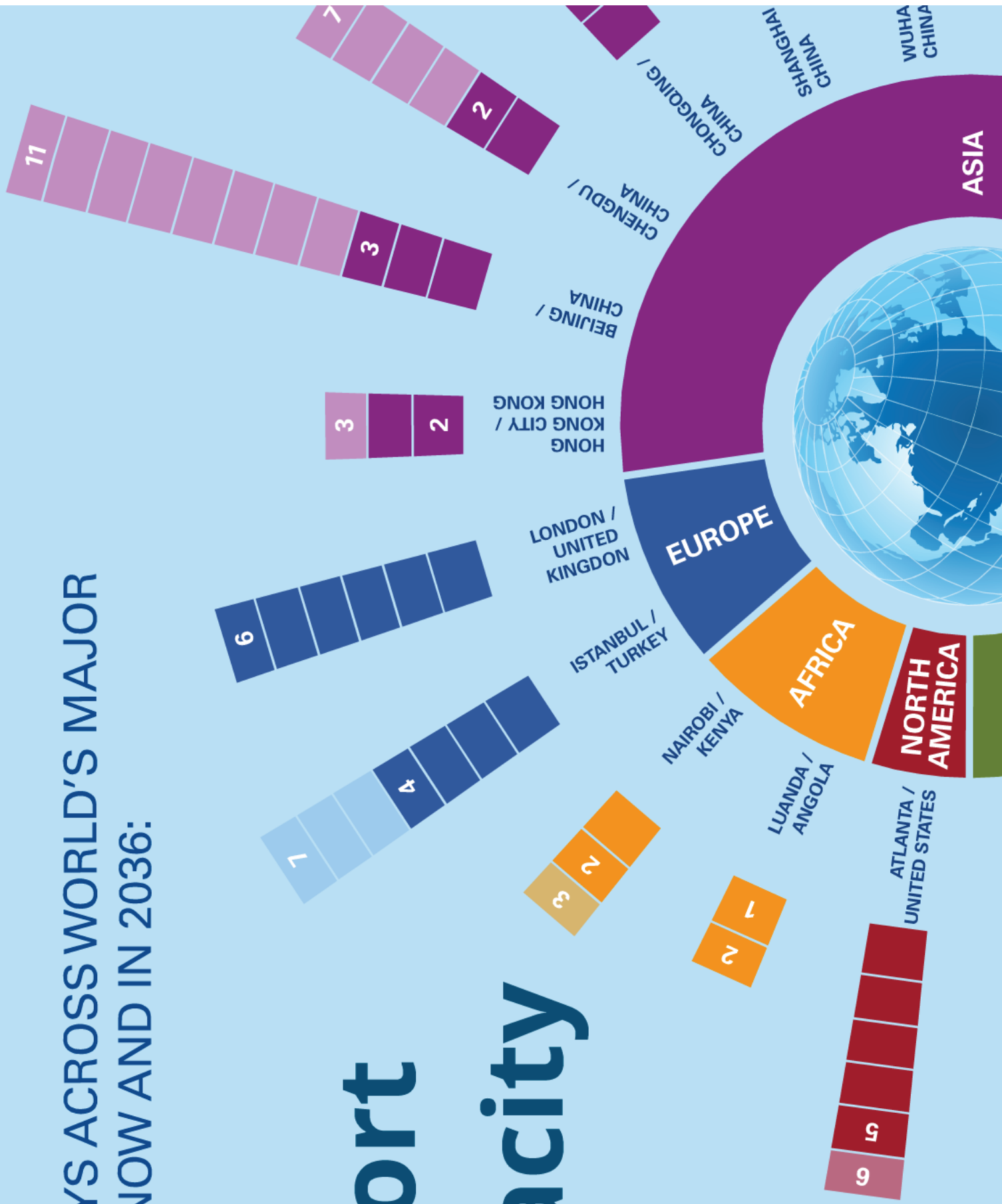
& license to grow

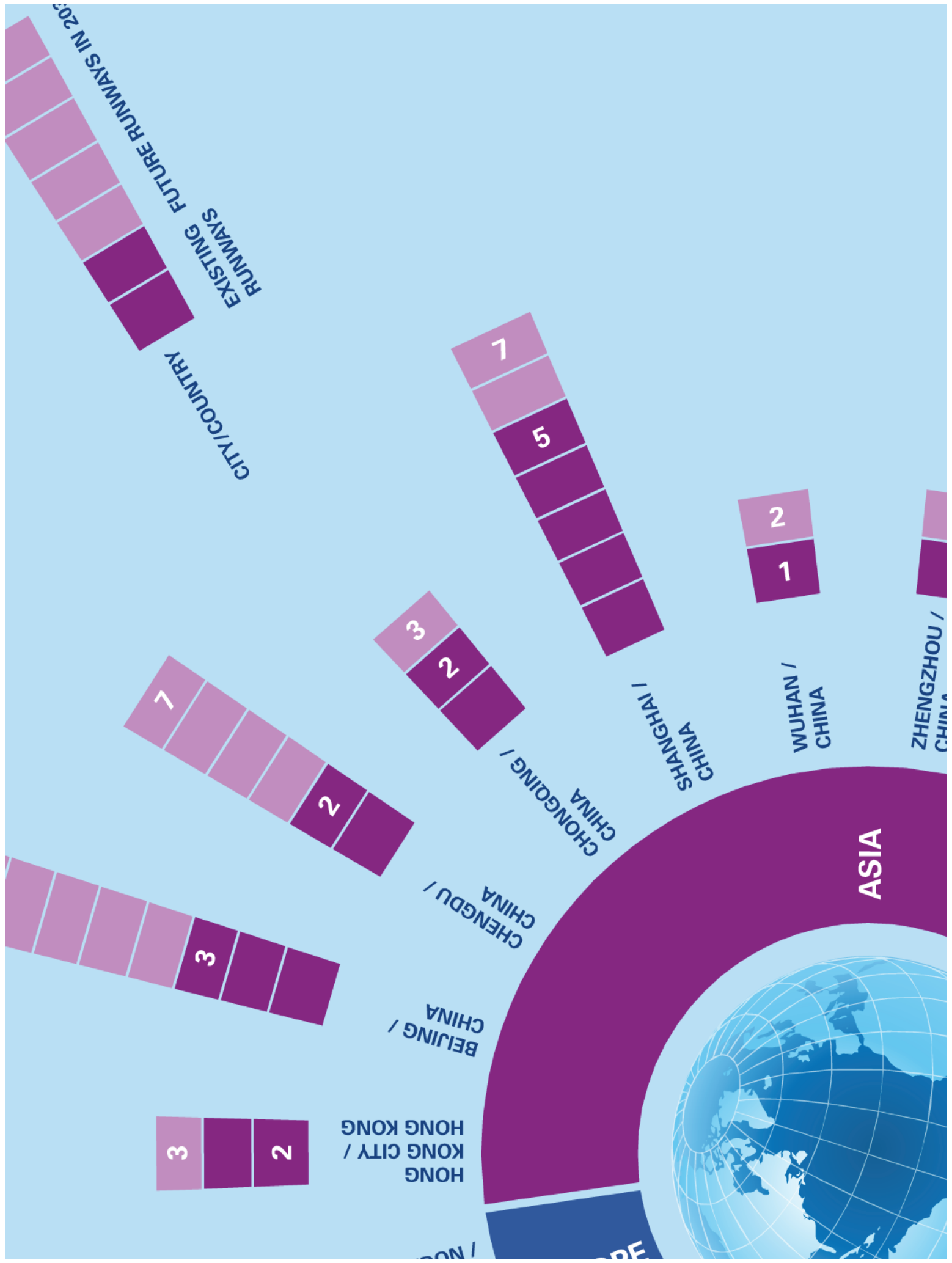


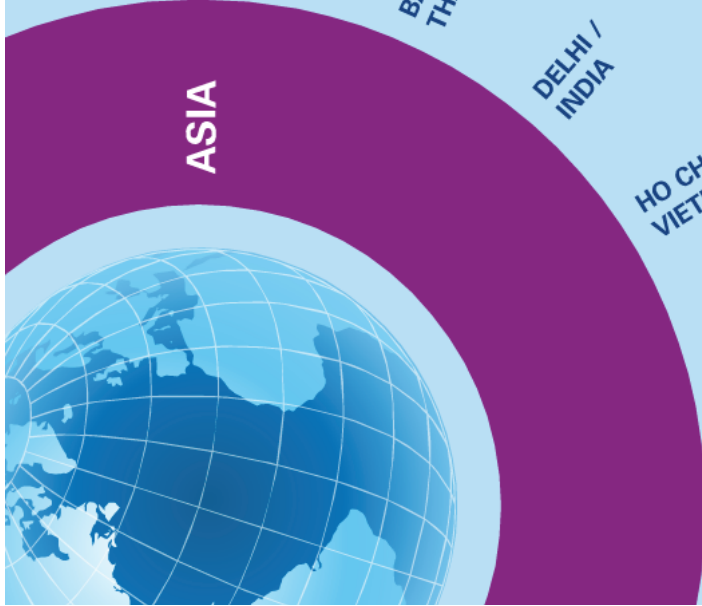
Runways now and in 2036.

RUNWAYS ACROSS WORLD'S MAJOR CITIES, NOW AND IN 2036:

airport capacity







ASIA



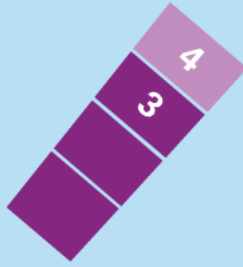
WUHAN / CHINA



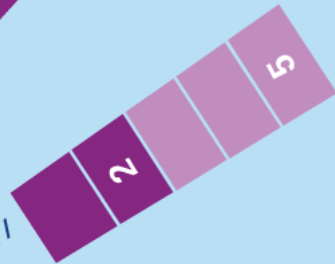
ZHENGZHOU / CHINA



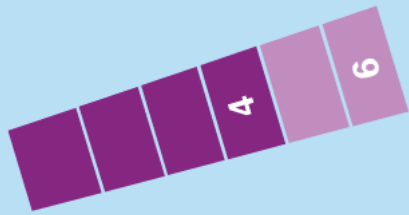
BANGKOK / THAILAND



DELHI / INDIA



HO CHI MINH / VIETNAM



MANILA / PHILIPPINES



SINGAPORE / SINGAPORE

& license to grow



Runways now and in 2036.



PE

AFRICA

NORTH AMERICA

SOUTH AMERICA

MIDDLE - EAST

HO CHI MINH
VIETNAM

MANILA / PHILIPPINES

SINGAPORE / SINGAPORE

MUMBAI / INDIA

DUBAI / UNITED ARAB EMIRATES

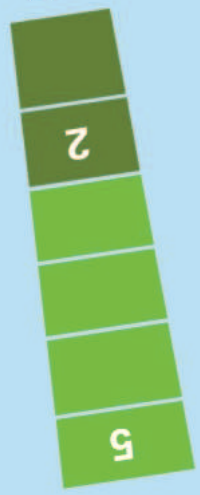
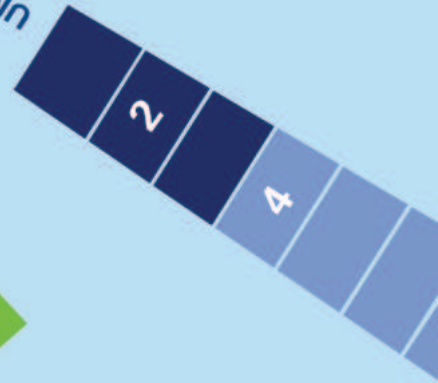
LIMA / PERU

SAO PAULO / BRAZIL

MEXICO CITY / MEXICO

ATLANTA / UNITED STATES

LUANDA / ANGOLA





Air Traffic Liberalisation





Operating costs & aviation taxes

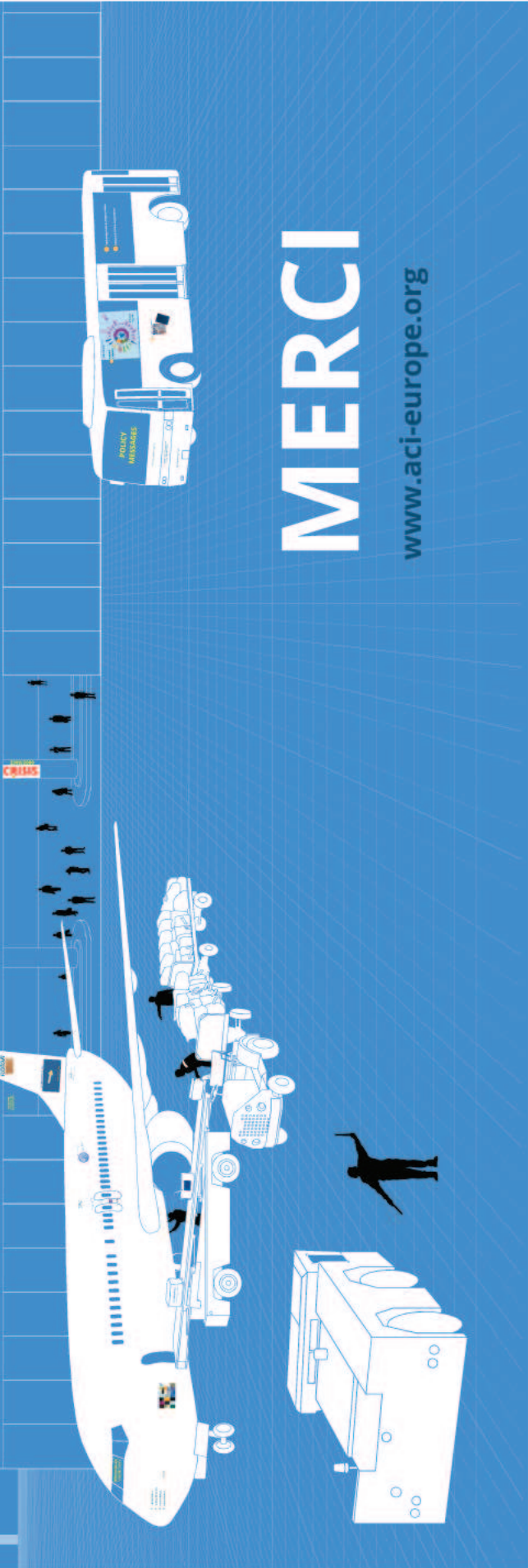


Airport & Airline cooperation

EVERY FLIGHT BEGINS AT THE AIRPORT.

DEPARTURES	
BRUSSELS	BOARDING
ROME	12:35
BRISTOL	12:40
BRISTOL	BOARDING
BRISTOL	12:45
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BRISTOL	00:00

BUEN VUELTO GÓRA FERÁ HYVÄÄ MATHAARI! HANO TAILOI! НА ДОБРА НОТ GOEDE REISI! BON VOYAGE! SAFE JOURNEYS! GÜTEN FLUG!



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