ACI EUROPE
AIRPORTS COUNCIL INTERNATIONAL

ACI EUROPE's
REGIONAL AIRPORTS' FORUM

EUROPEAN REGIONAL AIRPORTS

Connecting people, places & products

We would like to send a special thank you to all airports that kindly provided us with photos for this publication.

FOREWORD

Back in 2006, ACI EUROPE established the ***Regional Airports' Forum***, with the objective of providing a platform for smaller and regional airports to exchange knowledge, share best practices and discuss issues of common interest. The Forum now constitutes a **unique network of more than 450 regional airports**, which gives ACI EUROPE an in-depth knowledge of the issues and interests specific to their environment. Through the *Regional Airports' Forum*, ACI EUROPE ensures that the voice of those airports that are connecting the regions of Europe is heard and their specificities recognised – especially in all aviation related policies and regulatory issues.

This publication is the contribution of the *Regional Airports' Forum* to the general discussion on the added value of regional airports in Europe. It is aimed at presenting the relevance of regional airports in a wide context and their contribution to the local, regional and European economies as essential links in the European aviation network. An overview of the most important challenges and regulatory requirements facing them is also provided for a better understanding of their reality.

Olivier Jankovec
Director General
ACI EUROPE

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Ivalo Airport / IVL

DEFINITION OF REGIONAL AIRPORT

1. DEFINITION OF REGIONAL AIRPORT

There is an ongoing debate over the definition of "regional airport". Some attempts to define a regional airport link the notion of "regional" to the fact that the catchment area of an airport is located outside a capital city[1]. There is no definition of a regional airport at EU level to date.

In the US, the Federal Aviation Administration subdivides airports with commercial traffic into primary and non-primary airports, based upon the number of annual passenger boarding[2].

ACI EUROPE considers that the catchment area and/or annual traffic of an airport are not valid indicators of whether an airport is regional or not.

An airport should be considered as regional if it:

- **Primarily serves short and medium range routes and**
- **Primarily serves point-to-point destinations**

For a full list of ACI EUROPE's Regional Airports' Forum members, please see annexes.

1. European Parliament's Report on the future of regional airports and air services in the European Union. 2 April 2012: http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+REPORT+A7-2012-0094+0+DOC+XML+V0//EN
2. US Federal Aviation Administration, Airport Categories: https://www.faa.gov/airports/planning_capacity/passenger_allcargo_stats/categories/

2

Graz Airport / GRZ

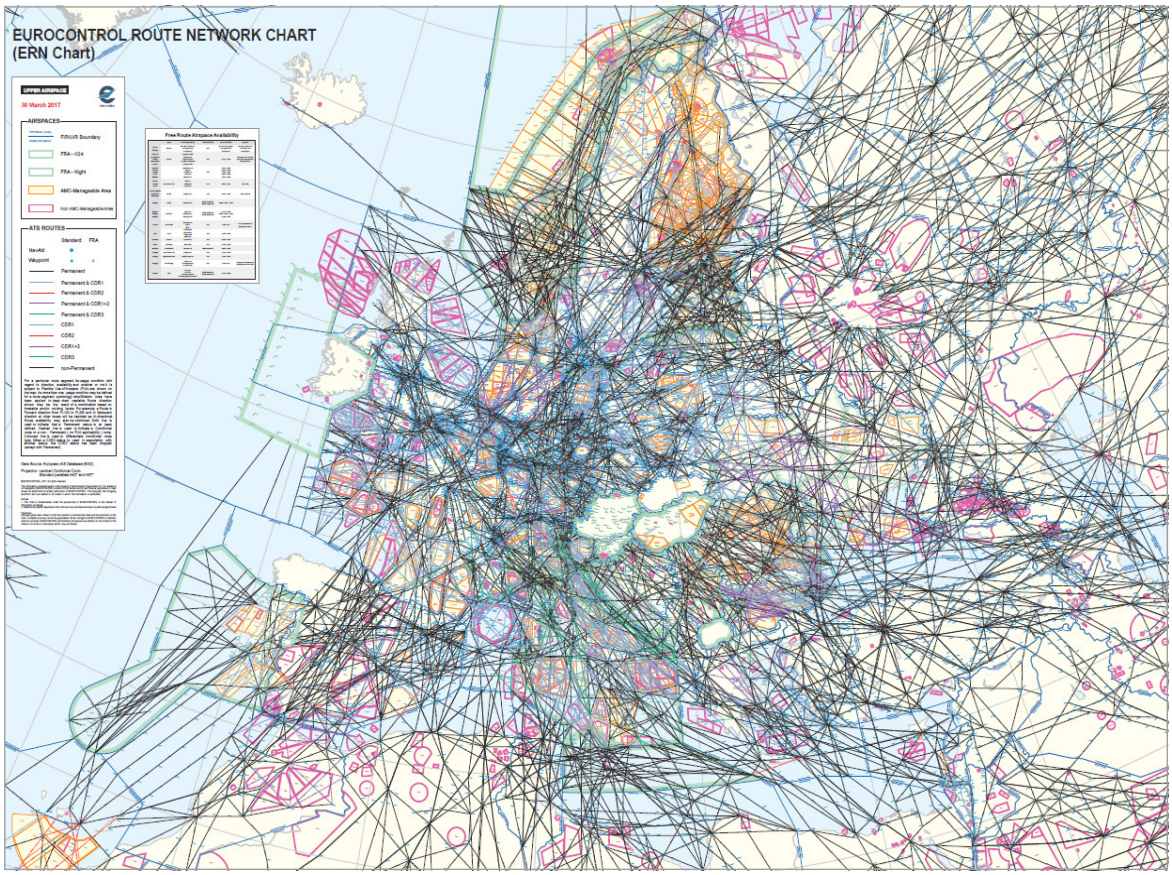
IMPORTANCE AND BENEFITS OF REGIONAL AIRPORTS IN EUROPE

2.1 REGIONAL AIRPORTS WITHIN THE EUROPEAN TRANSPORT NETWORK

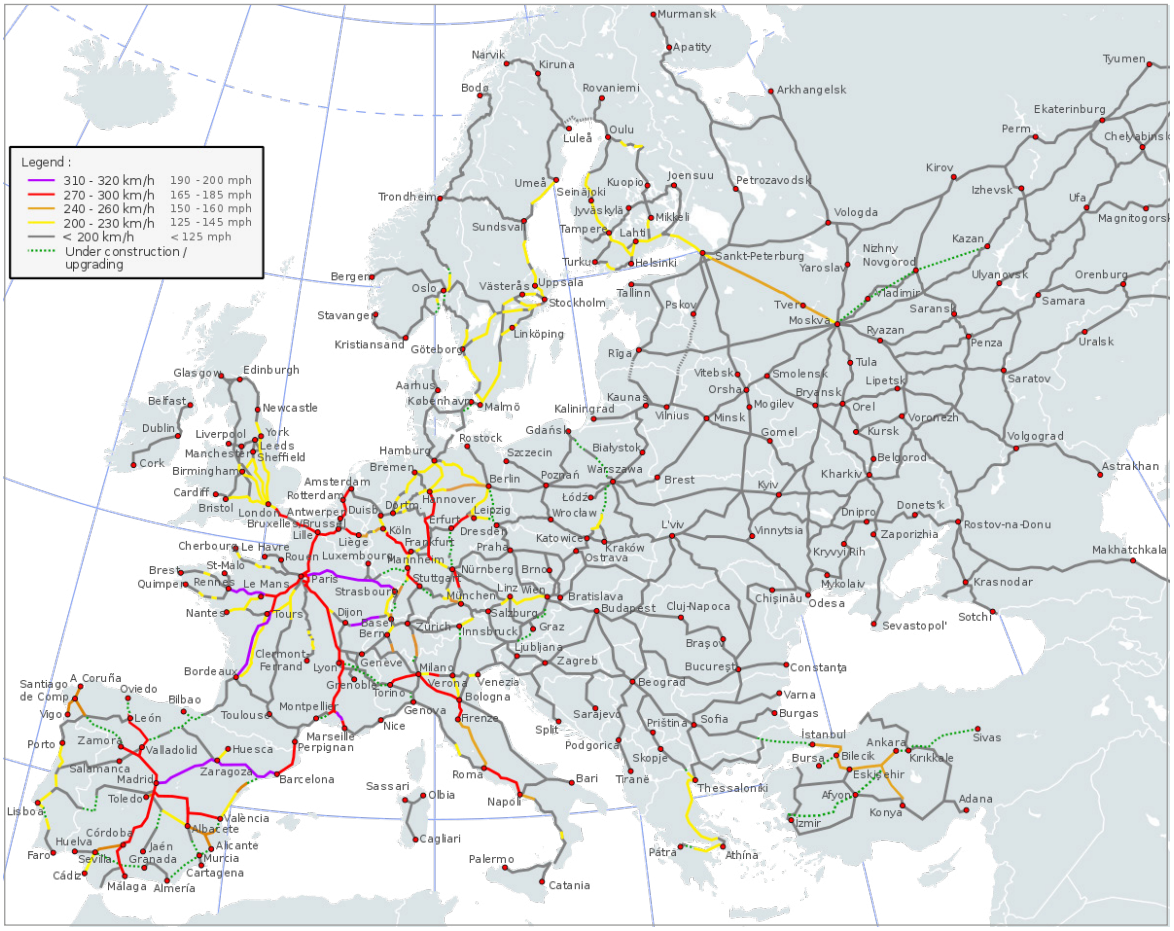
Regional airports are essential transport nodes, they facilitate the smooth running of the European single market by connecting people, products and services. They enable economic activity and growth. They expand the horizon of traditional trading routes and provide a significant boost to the cities and regions they serve by increasing accessibility and enhancing social cohesion and development.

This dense tissue of almost **500 airports** is a key element in supporting an efficient and well-functioning European transport network that facilitates trade and ensures mobility for a greater number of people – in a way that is simply unrivalled by any other mode of transport. For a better comparison, Picture 1 shows the European Air Network Route Chart, and Picture 2 the European High Speed Rail Network.

PICTURE 1 - **EUROPEAN AIR NETWORK CHART**



PICTURE 2 - **EUROPEAN HIGH SPEED RAIL NETWORK**



When combined together, regional airports provide a network that does much more than complementing the high-speed rail network. These airports provide **accessibility to the most remote areas of Europe**, allowing every regional community to be part of the European economic and social fabric – and **connecting them to the rest of the world.**

Regional airports also play a vital role as **congestion relievers** to some heavily congested hub airports, especially for regional services. If properly thought through, this could lead to less congestion and more environmental efficiency.

EUROCONTROL forecasts that future air traffic growth in Europe will be limited by capacity at airports[3]. By 2035, **12%** of demand for air transport will not be accommodated due to a lack of airport capacity in Europe. This translates into **1.9 million flights not taking place** and **237 million passengers unable to fly**[4]. Given that major hub airports are operating at maximum capacity, the development of regional airports can relieve congestion at major airports.

3. EUROCONTROL Long-Term Forecast - Flight movements 2010-2030.
4. ACI EUROPE Position Paper on Airport Capacity (October 2015).

2.2 ACCESSIBILITY & SOCIAL COHESION

In many regions of Europe, few efficient alternatives to air travel are available, due to a combination of factors including distance, low population density, geographic and/or climatic constraints. Airports in these regions have traditionally provided **access to essential services** such as health (e.g. air ambulances) and education for the local population. They also support **economic and social integration**, allowing businesses to be connected and citizens to travel for work but also leisure (e.g. take part in cultural and sporting activities). Regional airports and the air services they facilitate are thus extremely relevant when looking at **local development** and the **retention of residents**, especially where the risk of outward migration might be important.

2.3 A PLEASANT PASSENGER EXPERIENCE

As stated above, the European airport network offers unrivalled connectivity and mobility. In fact, 90% of this network is made up of regional airports, whose role and relevance has significantly expanded over the last 20 years.

These regional airports contribute to a pleasant passenger experience by providing easier access, terminals with shorter walking distances and more user friendly signage due to simple terminal design. With 209 air carriers, 14,600 routes to 724 destinations in 2017, their importance within the European air transport network has increased significantly in the last few years.

TABLE 1
CARRIERS, ROUTES AND DESTINATIONS (EUROPEAN REGIONAL AIRPORTS 2017)

Operating carriers	Routes	Destinations
209	14,600	724

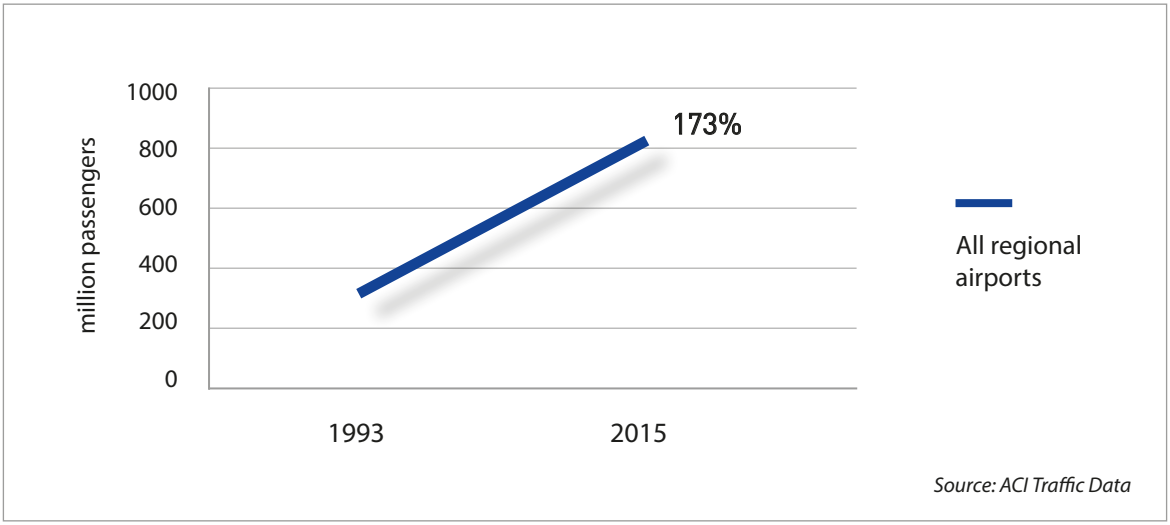
Innsbruck Airport / INN

2.4 EVOLUTION AND GROWTH

Until the end of the 1990's, regional airports lived in the shadow of Europe's hubs. With their ability to improve connectivity through the development of new routes constrained by regulatory barriers, the function of most regional airports was limited to providing feeder services typically operated by or on behalf of the flag carrier to hub airports. Leisure/charter, cargo traffic & general aviation were the only opportunities for diversification.

The **liberalisation of air traffic rights** within Europe and the **emergence of new (low cost & point-to-point) airline models** resulted in regional airports experiencing significant growth over the last 25 years. The increasing congestion at larger airports and the business evolution of airports have played their part too. Between 1993 and 2015, traffic at regional airports in Europe increased by **+173%**. Today, regional airports handle an excess of **800 million passengers each year**!

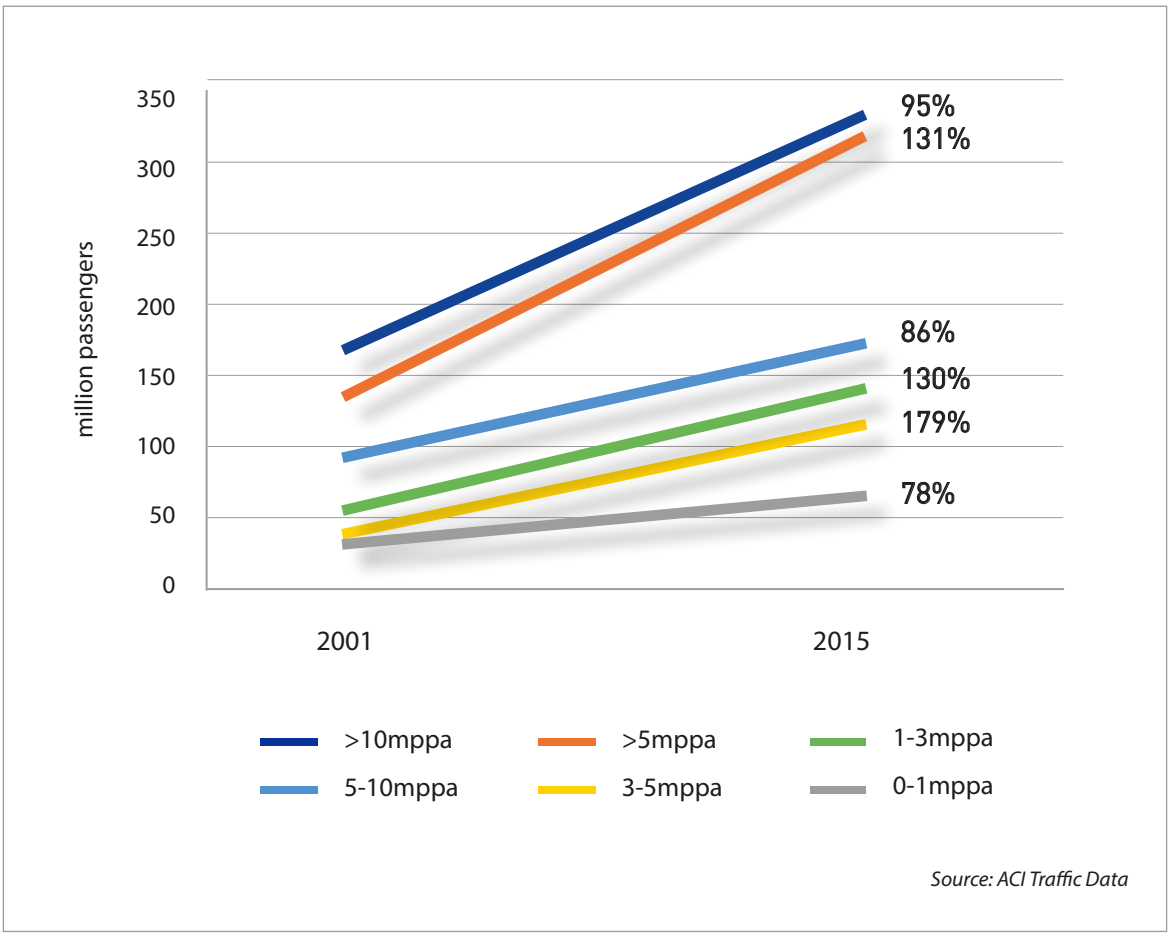
GRAPH 1
EVOLUTION OF PASSENGER TRAFFIC AT EUROPEAN REGIONAL AIRPORTS (1993-2015)



Source: ACI Traffic Data

GRAPH 2

EVOLUTION OF PASSENGER TRAFFIC AT EUROPEAN REGIONAL AIRPORTS (2001- 2015) BY AIRPORT SIZE



Source: ACI Traffic Data

Olbia Airport / OLB

TABLE 2
EVOLUTION OF PASSENGER TRAFFIC AT EUROPEAN REGIONAL AIRPORTS (2001-2015)

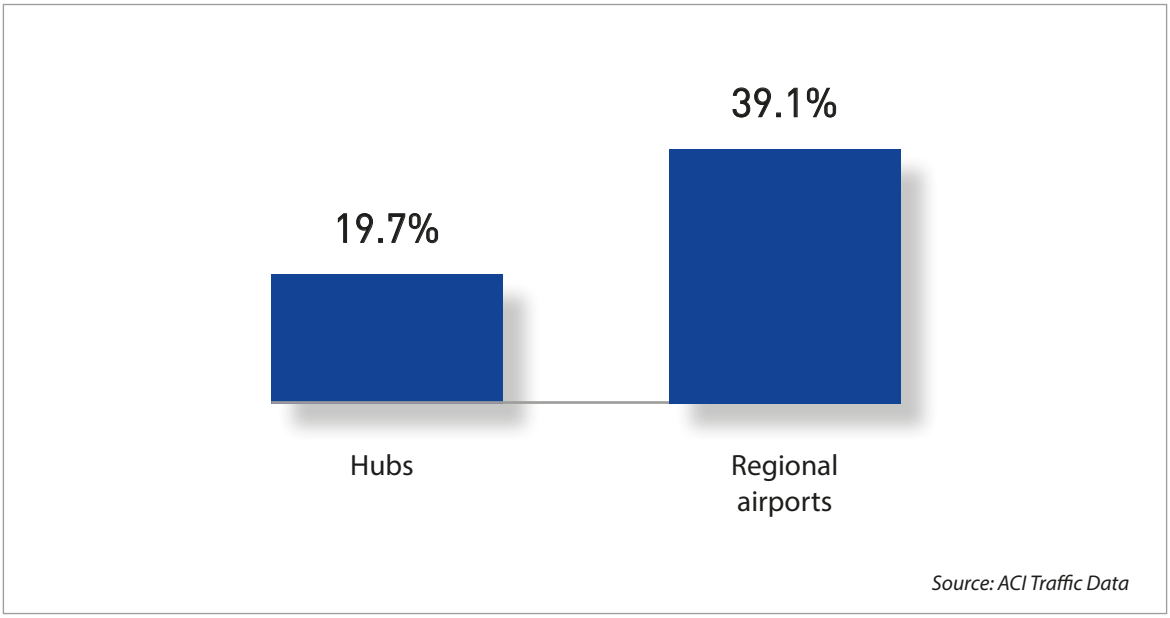
Regional airports (members of ACI EUROPE'S RAF)	Traffic 2015 (m pax)	Share in 2015 traffic at regional airports	Traffic 2014 (m pax)	2015 vs 2014	Traffic 2008 (m pax)	2015 vs 2008	Traffic 2001 (m pax)	2015 vs 2001	Number of airports
All regional airports	821.8	100.0%	778.8	5.5%	641.3	28.2%	400.9	105.0%	466
Below 25mppa	740.7	90.1%	704.9	5.1%	594.6	24.6%	377.5	96.2%	463
Below 10mppa	490.1	59.6%	467.0	4.9%	388.6	26.1%	230.4	112.7%	445
Below 5mppa	317.4	38.6%	303.4	4.6%	250.9	26.5%	137.5	130.8%	419
Below 1 mppa	64.6	7.9%	62.0	4.2%	56.2	15.0%	36.3	77.9%	314
Below 750 000 ppa	47.8	5.8%	46.4	3.2%	44.5	7.5%	28.0	71.0%	295
Below 700 000 ppa	42.8	5.2%	41.5	3.0%	38.5	11.2%	25.1	70.7%	288
Below 500 000 ppa	32.7	4.0%	31.8	3.0%	30.0	9.0%	19.6	67.4%	271
Below 300 000 ppa	18.3	2.2%	17.8	2.8%	18.3	0.4%	12.2	50.3%	233
Below 200 000 ppa	10.7	1.3%	10.6	1.4%	11.4	-6.0%	7.1	51.1%	202
Below 150 000 ppa	7.3	0.9%	7.1	3.2%	9.2	20.0%	5.7	28.1%	183
Below 50 000 ppa	1.7	0.2%	1.8	-6.5%	4.3	60.9%	1.5	8.8%	126

These figures reflect the increasing importance of regional airports in providing not only access to the national hub airport(s) but also direct access to a range of destinations outside their own country.

2.5 THE CONNECTIVITY OF EUROPEAN REGIONAL AIRPORTS

Over the last 12 years, the number of flights (direct connectivity) at regional airports grew **twice as fast** as at European hubs: **+39.1%** vs **+19.7%**.

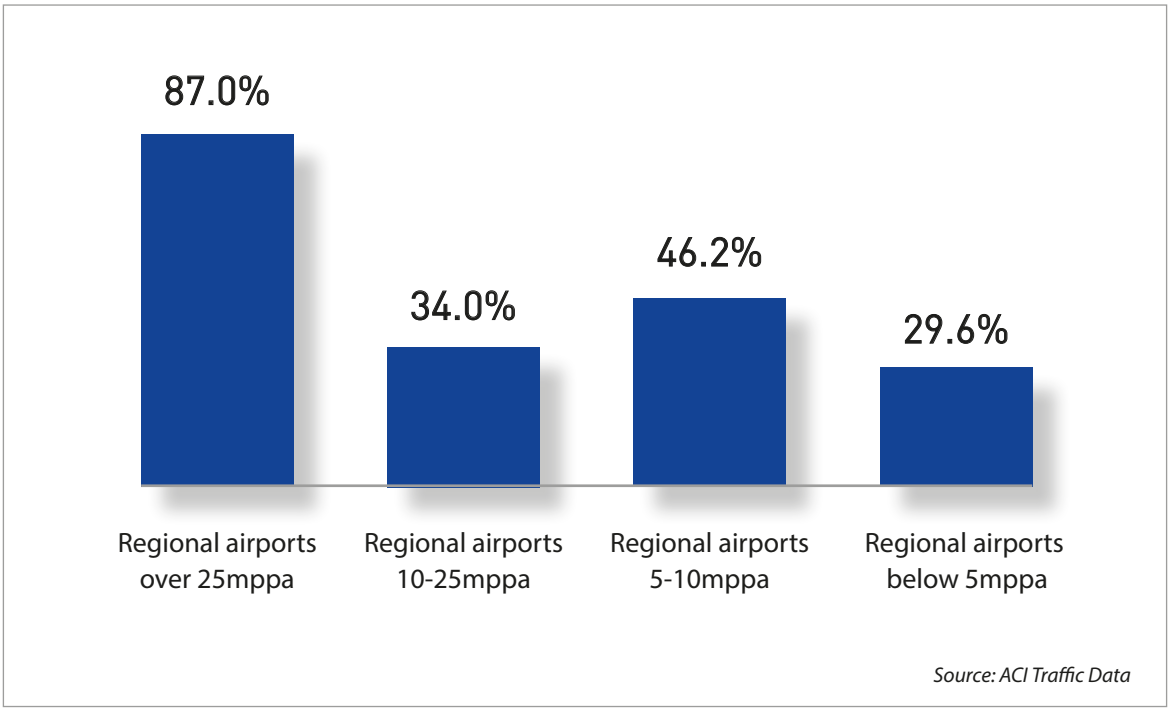
GRAPH 3
EVOLUTION OF DIRECT CONNECTIVITY AT EUROPEAN HUBS AND REGIONAL AIRPORTS FROM 2005 TO 2017



Source: ACI Traffic Data

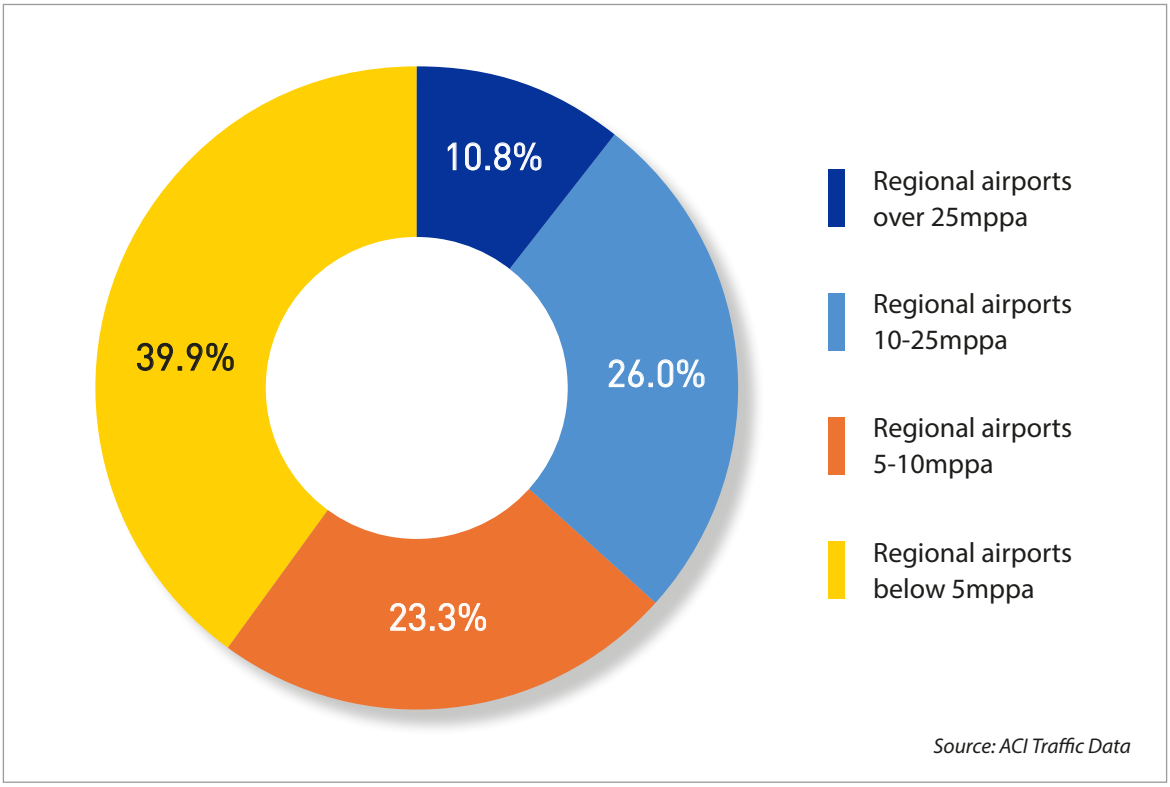
Looking more in details, it appears that regional airports that currently handle **more than 25 million passengers per annum (mppa)** registered the fastest growth over the period, two to three times the growth of smaller regional airports, as shown in Graph 4. However, their share of the direct connectivity provided by regional airports remains the smallest at **10.8%** (Graph 5).

GRAPH 4
EVOLUTION OF DIRECT CONNECTIVITY AT EUROPEAN REGIONAL AIRPORTS FROM 2005 TO 2017



Source: ACI Traffic Data

GRAPH 5
SHARE OF DIRECT CONNECTIVITY AT EUROPEAN REGIONAL AIRPORTS IN 2017



Source: ACI Traffic Data

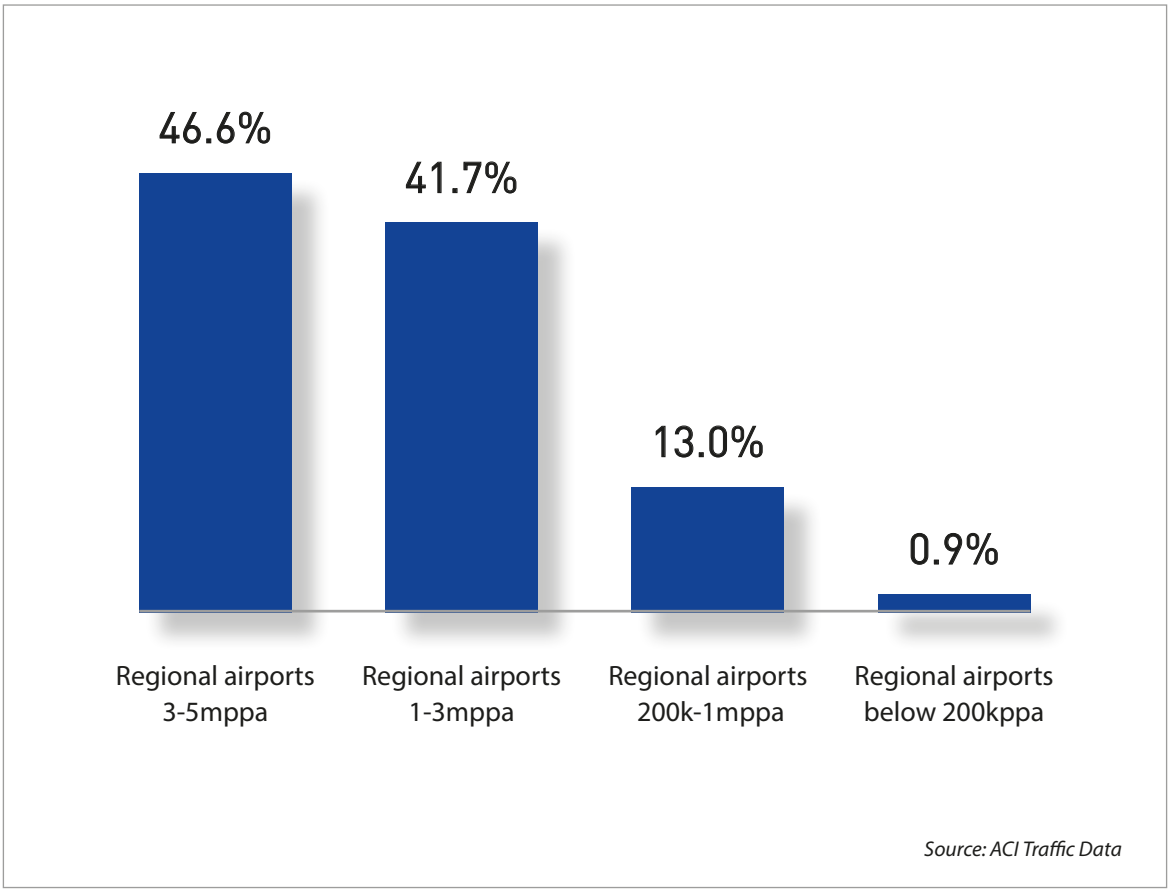
Airports that handle **10 to 25mppa** and those handling **5 to 10mppa** each ensured a quarter of direct connectivity from regional airports (respectively 26% and 23.3%), with the latter category growing at the second fastest pace 46.2%.

Nearly **40%** of flights out of regional airports take off from airports below 5mppa. This category grew at a slower pace, handling **29.6%** more flights in 2017 compared with 2005, however it witnessed different evolutions depending on the size of airports.

At airports handling **1 to 5mppa**, direct connectivity grew at levels comparable to bigger regional airports, i.e. over **40%**. These airports ensure close to three quarters of direct connectivity going out of airports below 5mppa (see Graph 6).

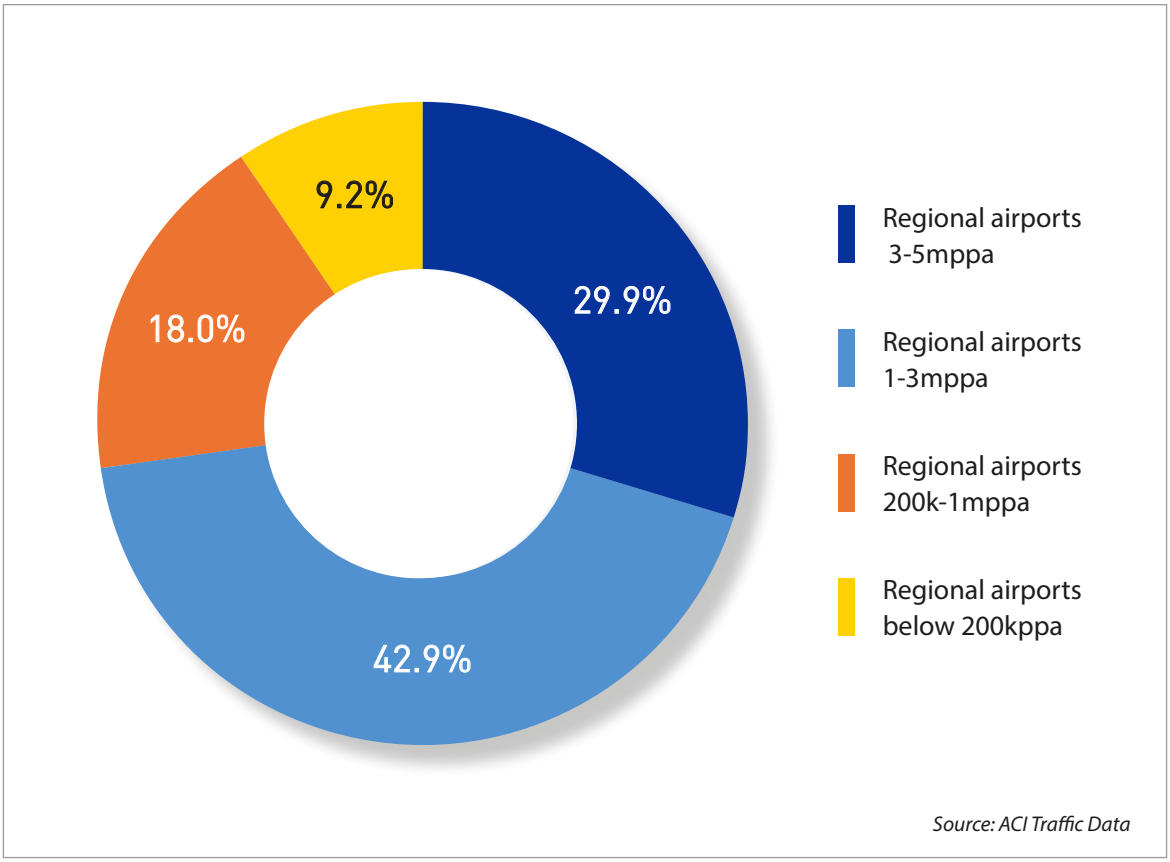
The remaining quarter is ensured mostly by **airports between 200,000 and 1 million passengers**, that now handle **13%** more flights than in 2005. It is remarkable that in 2017 the level of direct connectivity at airports below 200,000 passengers per year remained close to the level of 2005 (+0.9%).

GRAPH 6
EVOLUTION OF DIRECT CONNECTIVITY AT SMALL EUROPEAN REGIONAL AIRPORTS (BELOW 5MPPA) FROM 2005 TO 2017



Source: ACI Traffic Data

GRAPH 7
SHARE OF DIRECT CONNECTIVITY AT SMALL EUROPEAN REGIONAL AIRPORTS (BELOW 5MPPA) BY TRAFFIC IN 2017



Source: ACI Traffic Data

2.6 DRIVING ECONOMIC COMPETITIVENESS: EMPLOYMENT AND ADDED VALUE

The traffic growth and diversification of regional airports demonstrate their **increasing relevance** for the mobility of Europe's businesses and citizens. In a multipolar world, where businesses need to look beyond Europe for opportunities, **access to hub airports** remains vital for the global connectivity of any region. But providing **direct connectivity to a wider range of destinations within Europe** – and even beyond – has become a **key competitive asset** for any European region.

This is where the impact of aviation liberalisation and new (low cost & point-to-point) airline models has been the strongest – allowing for **trans-regional connectivity** through the opening of new direct air routes across Europe. This evolution is now being reflected by traditional network airlines, as some of them are starting to diversify from the classic hub and spoke model.

As a result, along with their larger counterparts, airports in the regions are now defining the economies of their communities. This is not only about driving tourism development, but more generally about **using airports as catalysts for economic regeneration and growth**. While regional airports have a positive impact for companies already established locally, they are essential to attracting new companies and

Faro Airport / FAO

diversifying economic activity. All business surveys indicate that the vicinity of an airport is one of the key company location factors and there are successful examples of regional airports having developed business parks or hosting research centres.

It is therefore no surprise that regional airports are now considered **prime assets** by regional and local authorities. As such, they are not only an essential part of the national and European transport network, they are a vital part of any region's strategy to attract and retain investment and growth.

TABLE 3
THE CONTRIBUTION OF EUROPEAN REGIONAL AIRPORTS TO EMPLOYMENT & GDP

	Direct Employment	Indirect Employment	Induced Employment	Direct GDP*	Indirect GDP*	Induced GDP*
Regional airports	710,900	574,900	603,500	€40.7bn	€28.2bn	€15.6bn
% of the total provided by European airports	40.7%	41.2%	41.9%	38.5%	38.6%	39.1%

**GDP in 2013 price levels*

TABLE 4
THE ADDED VALUE OF EUROPEAN REGIONAL AIRPORTS

	Total Employment	Total GDP*
Regional airports	1,889,300	€84.5bn
% of the total provided by European airports	41.2%	38.7%

**GDP in 2013 price levels*

ACI EUROPE'S ECONOMIC IMPACT CALCULATOR: MEMBERS ONLY

www.aci-europe.org/economic-impact-calculator

3

Åre Östersund Airport / OSD

MAIN CHALLENGES FACING REGIONAL AIRPORTS IN EUROPE

3.1 MANAGING HIGH OPERATING AND FIXED COSTS, CAPEX AND MAINTENANCE

Understanding the cost structure of airports

In order to understand the cost structure of an airport, it is very important to keep in mind that airports have to provide service continuously during published opening hours. As public infrastructure, airports also have to serve as emergency landing or alternative airports. Therefore, operating costs also occur at times when an airport does not handle any flight. Furthermore, an airport has to cater for any kind of traffic be it small General Aviation planes or larger aircraft. This means that **airport charges levied on users do not always cover the costs of the airport**.

The size and weight of the largest aircraft able to land regularly at the airport determine the infrastructure to be provided:

- Dimension of the runway, taxiway and apron stands
- PCN (Pavement Classification Number) of runway
- Number and size of firefighting and rescue equipment
- Number of firefighting staff on site
- Number and size of aircraft handling equipment

The airport has to provide the **minimum equipment and staff** to handle this kind of aircraft **at any time during opening hours**. This means that the costs of human resources, provision, operation and maintenance of infrastructure and equipment incur even without a single flight.

Capacity (and not traffic) is therefore the main trigger of costs/expenses. In terms of cost management, the airport managing body can adjust the capacity to the projected traffic, but its margins are limited when reacting to short-term traffic changes. Infrastructure expenditure, however, is a long-term decision. Requirements for a runway, apron or passenger terminal building cannot be changed after the respective project is finalised. That means that the cost level is then set for a long time.

The operating costs of airports also grow very quickly. Increasing and more stringent **regulatory requirements for security, safety, environment**, and **border control** not only imply considerable amounts of equipment and infrastructure but also staff to operate them.

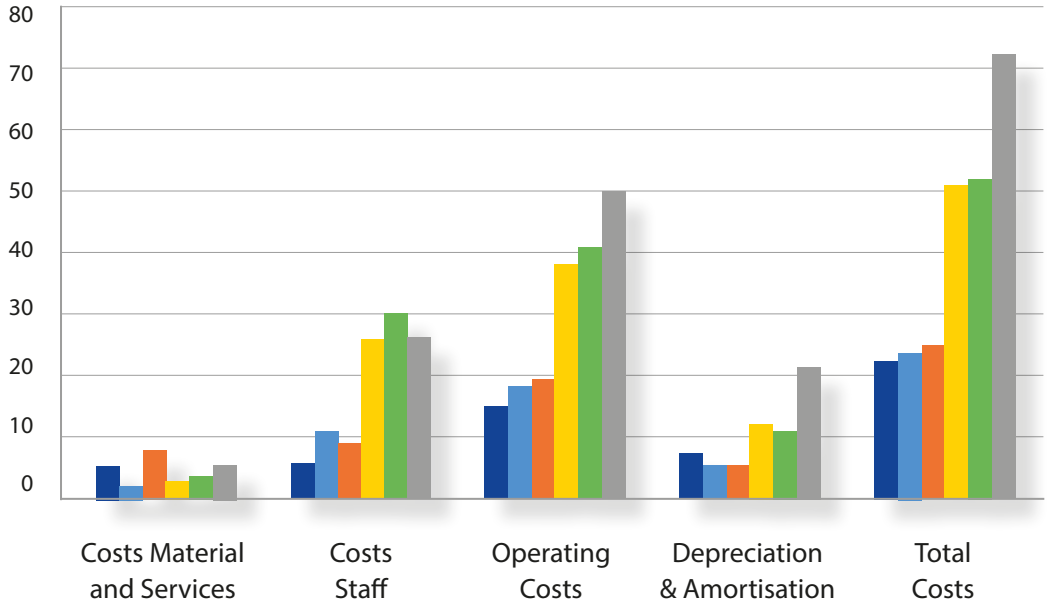
On the other hand, **airline pressure** on airports to reduce their charges has been growing year after year as a result of **increasing airport competition**[5]. Therefore, in many cases regional airports are **unable to compensate these higher costs through airport charges increases**.

On a per passenger basis the costs incurred at regional airports are higher than at larger airports due to **very limited economies of scale**.

5. ACI EUROPE Synopsis Publication *The Competition Edge: Airports in Europe* (2017).

Graph 8 shows the costs per passenger at three European small regional airports compared with the figures of three hub airports.

GRAPH 8
EXPENDITURE PER PASSENGER IN 2013



**Due to the confidential nature of the data, we present these results anonymously*

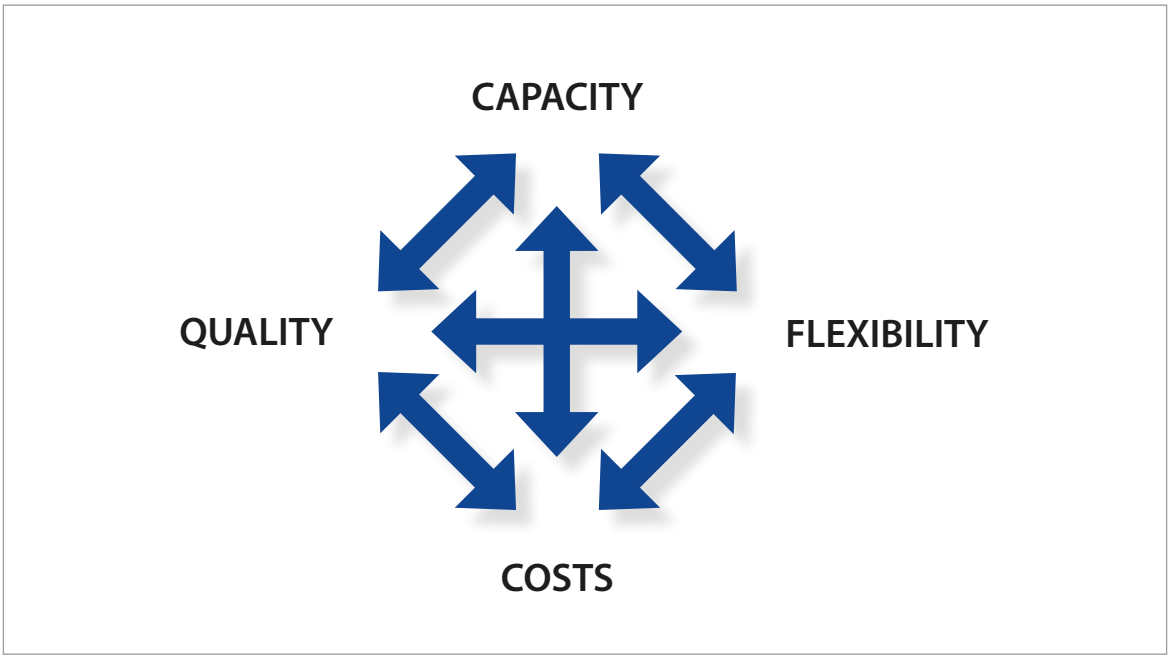
Source: ACI EUROPE

As a result, one possibility to reduce costs per passenger or traffic unit is to grow as there is a proven evidence of so-called economies of scale at airports.

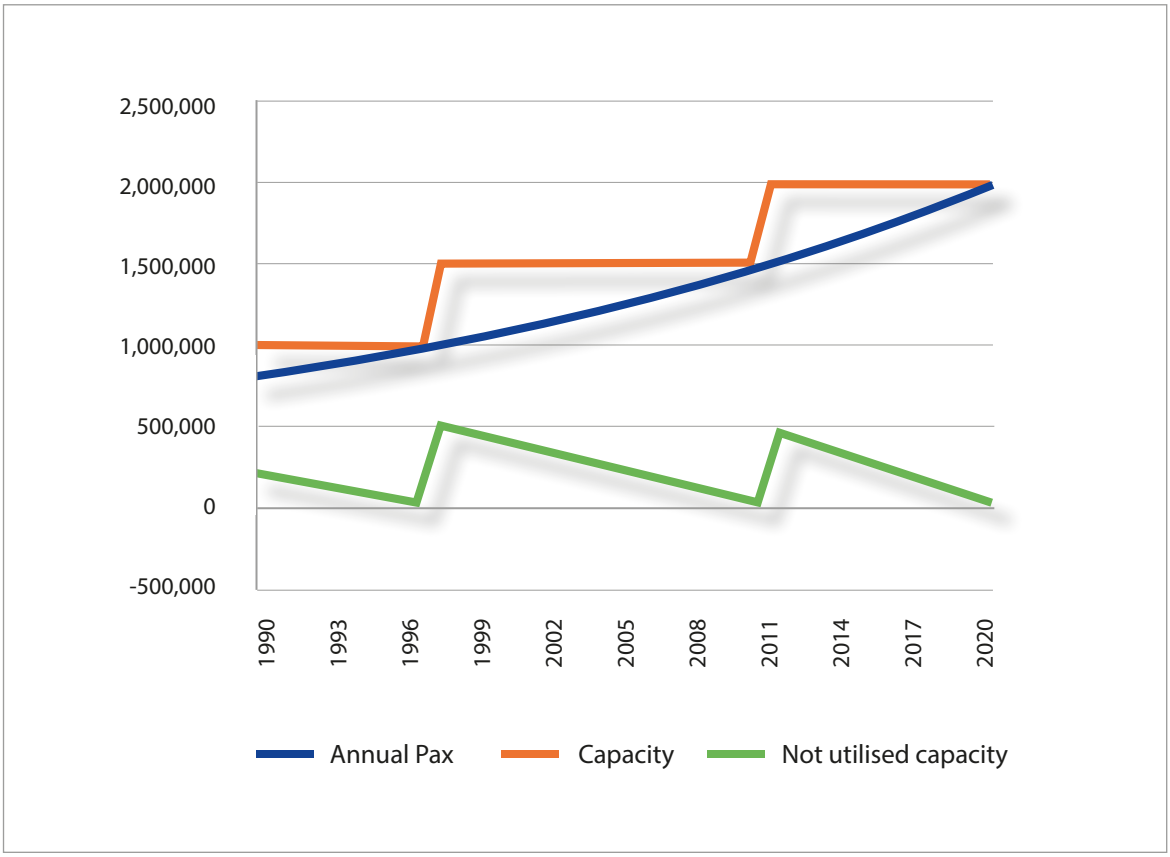
Are airports doomed to grow? On the one hand, aeronautical revenues per traffic unit are stagnating, or even worse, declining while on the other hand costs are increasing. The only way to increase the profitability therefore seems to grow traffic while keeping costs under strict control.

The definition of requirements and a clear vision of future needs are therefore key for successful airport operations. However, the only constant factor in the business is change, meaning that airports also need to keep flexibility.

PICTURE 3
THE VARIABLES OF THE GROWTH EQUATION

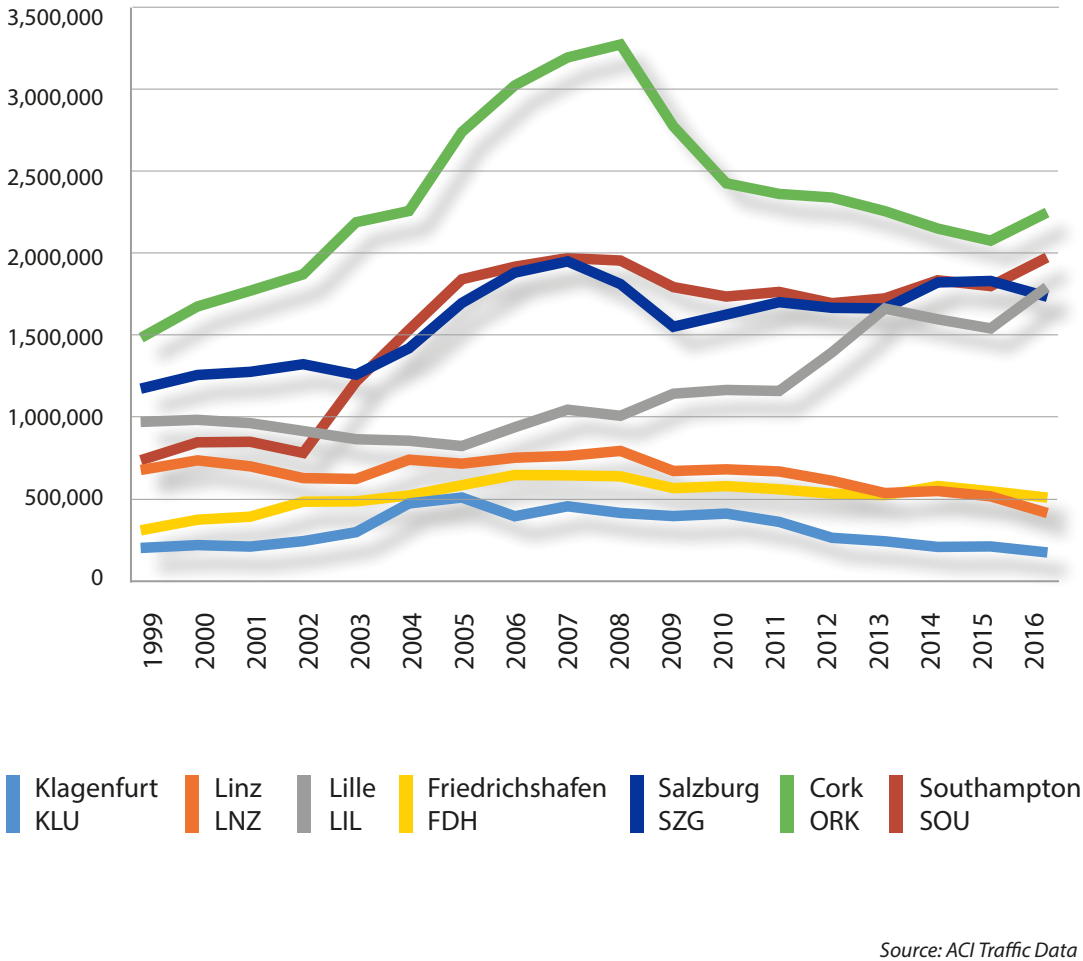


GRAPH 9
THE STANDARD LEGACY APPROACH



As shown by Graph 9, the standard legacy approach is that traffic growth is constant and linear. Capacity has to be provided in line with growth. However, this approach does not reflect reality since the **volatility of air traffic** has increased dramatically in the last 10 years.

GRAPH 10
TRAFFIC EVOLUTION AT SELECTED REGIONAL AIRPORTS

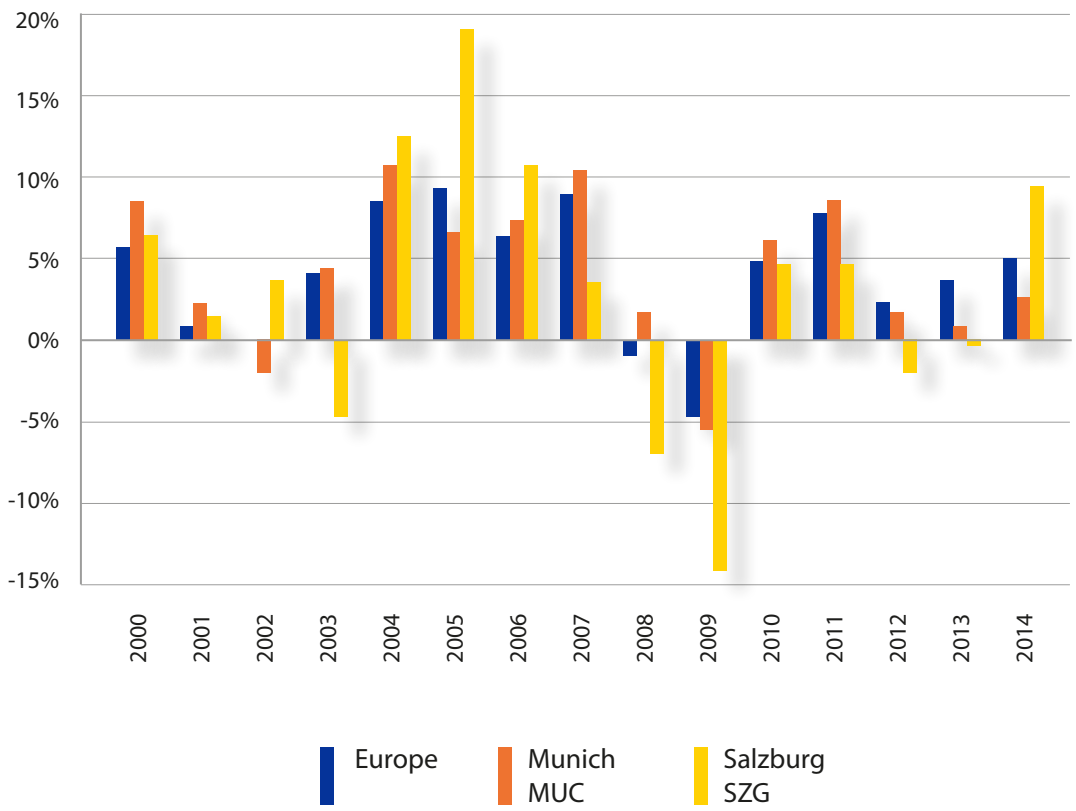


Source: ACI Traffic Data

When looking at passenger traffic developments at some regional airports (Graph 10), it is obvious that capacity planning is not as easy as it may seem (compared to traditional traffic forecasts). Regional airports are more exposed to volatility in their traffic development because they typically **rely disproportionately on one kind of traffic or one airline** and are **less able to diversify their traffic mix** compared to their larger counterparts.

This means that the **risk of over and underutilisation of capacity is very high**. Besides the traditional capacity expansion approach, airports have to define also a variety of operational measures in order to deal with short/medium term overutilisation.

GRAPH 11
COMPARISON OF THE TRAFFIC EVOLUTION IN EUROPE, MUNICH AND SALZBURG



Source: ACI Traffic Data

Rovaniemi Airport / RVN

Operational Expenditures

Regional airports are very exposed to peaks. Airport staff needs to be very flexible in terms of timing and area of expertise. On the other hand, the work at a regional airport is not as complex as it can be at a hub airport, for example. Therefore, regional airports can employ "multi-functional" staff: e.g. an employee will not only perform ramp handling tasks, but can also act as a fire fighter and member of the maintenance team.

Flexibility

Flexibility needs to be built in the design process of infrastructure projects. Whenever possible and useful, the ability to react to change needs to be part of the planning process. A terminal building should be designed in a way that the space allocation can be adjusted (e.g. increasing the space for security checks by reducing the space of other functional areas if possible). Approaches like this may reduce the need to build additional space and hence reduce the total costs of an airport.

Cooperation

Will cooperation among airports be a valid approach in order to reduce costs? These areas may include:

- Project management: using the experience of projects at other airports
- Joint procurement of equipment and utilities
- Joint staff education
- Pooling of equipment

Since growth is not guaranteed on a linear basis, regional airports need to manage their costs very effectively. In the past, it was possible for shareholders to compensate any financial gaps by additional capital injections, but this type of support is very limited nowadays. The main area for potential savings is a very strict asset management approach limiting the risk of over-capacity that leads to high unproductive costs. Another area that needs to be investigated in more detail is the possibility of savings by cooperating with other airports.

3.2 OPTIMISING RESOURCES

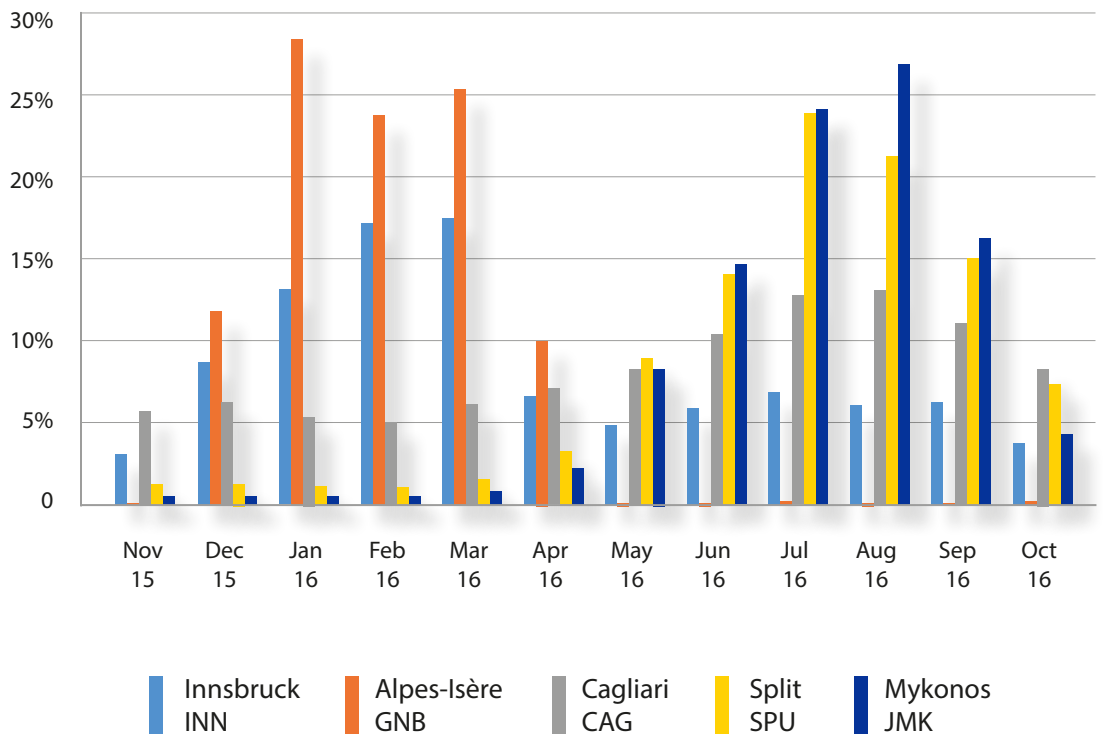
Efficient Asset Utilisation

Regional airports face the challenge of an uneven distribution of traffic. They typically serve three market segments:

- Hub-feeding flights
- Point-to-point flights (mostly low cost flights)
- Seasonal leisure-driven flights

Airports with a stronger touristic focus serving as an incoming destination tend to show a high seasonality in traffic.

GRAPH 12
MONTHLY DISTRIBUTION OF TRAFFIC AT SELECTED REGIONAL AIRPORTS IN 2015-2016



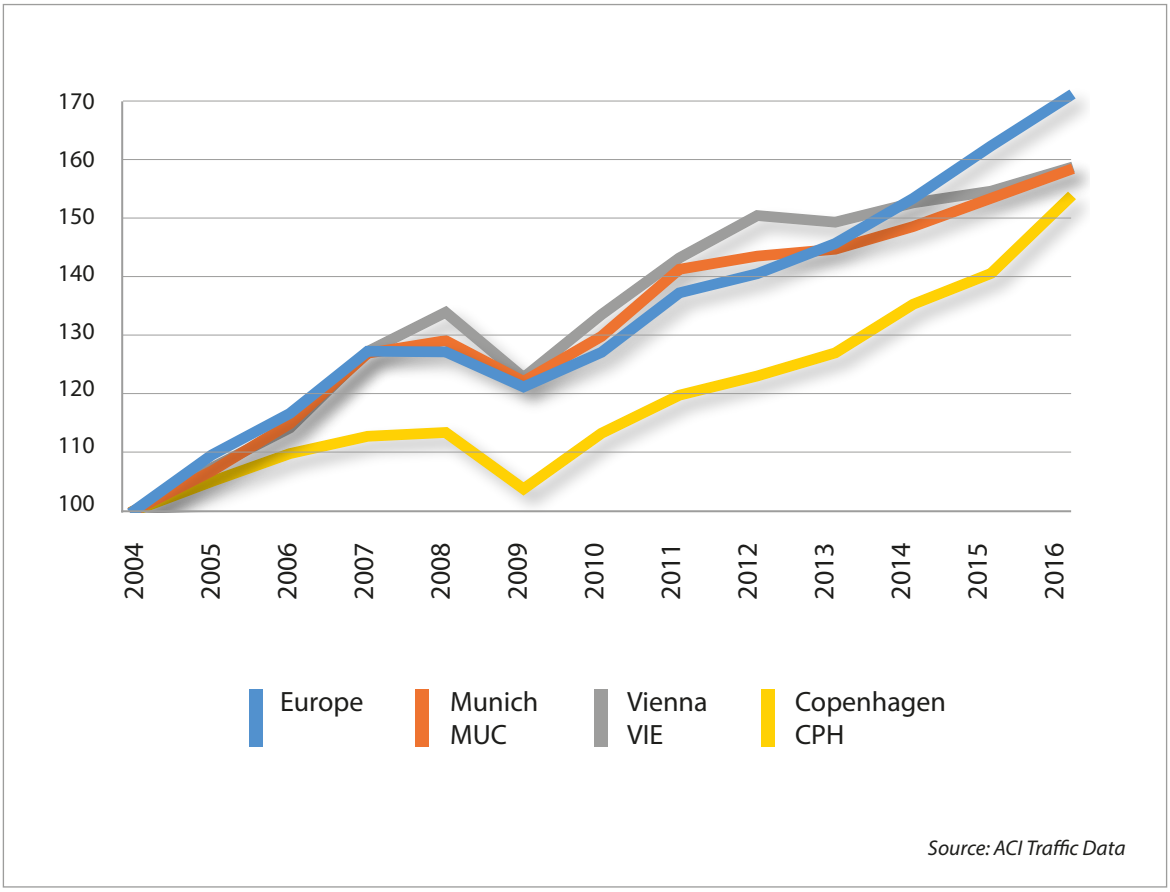
Source: ACI Traffic Data

Graph 12 shows the monthly distribution of traffic at five European regional airports. Innsbruck and Grenoble airports serve an incoming airport for skiing resorts and have a rather limited catchment area: 50% of the majority of the total annual traffic is handled within the first three months of the year. The same applies for Cagliari, Split and Mykonos airports during the summer season.

Besides the **uneven traffic distribution over the year**, regional airports seem to grow differently than larger airports.

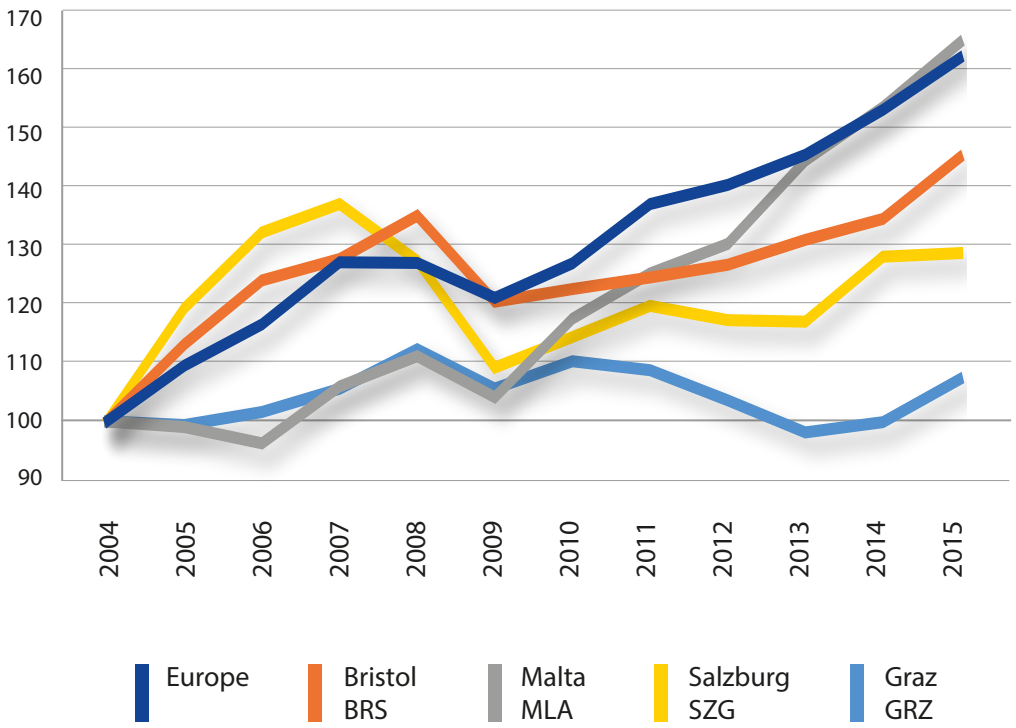
Graph 13 shows that larger airports like Munich (MUC), Vienna (VIE) and Copenhagen (CPH) follow more or less the industry trend. Smaller airports, however, show very distinct and more varied growth patterns, as shown by Graph 14.

GRAPH 13
ANNUAL TRAFFIC DEVELOPMENT IN EUROPE (INDEX) AND SELECTED EUROPEAN HUBS



Source: ACI Traffic Data

GRAPH 14
ANNUAL TRAFFIC DEVELOPMENT (INDEX) IN EUROPE AND SELECTED EUROPEAN REGIONAL AIRPORTS



Source: ACI Traffic Data

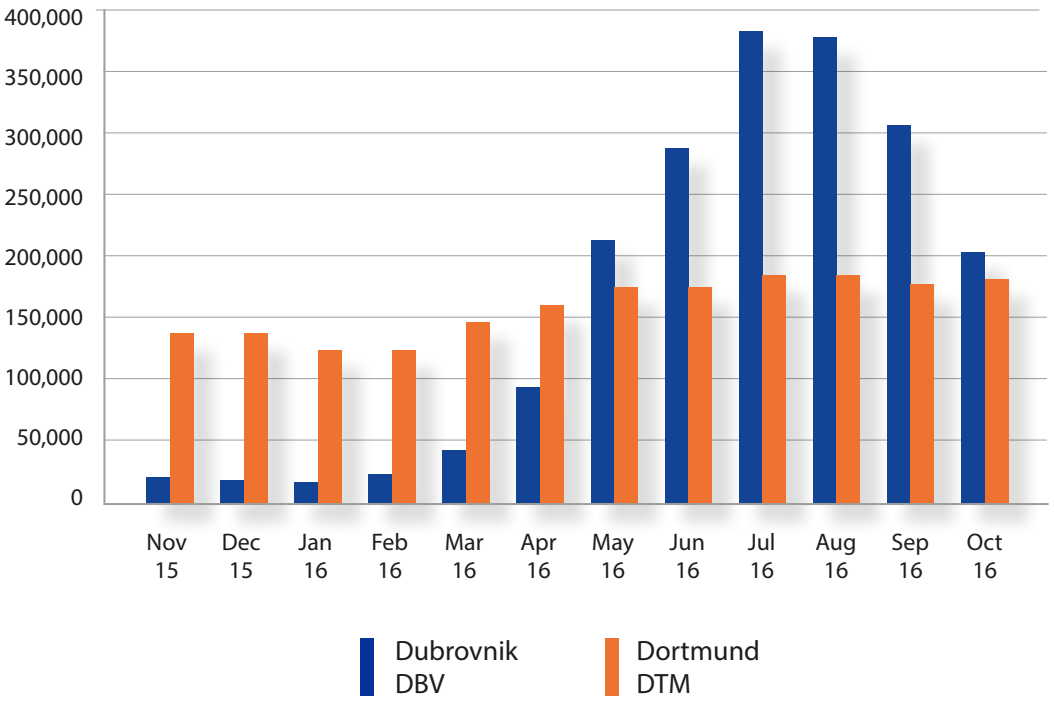
Both effects, uneven distribution of traffic over the year and high volatility in growth, lead to a substantial challenge concerning the right size of the facilities an airport deploys. **The risk of either under-utilised or over-utilised assets is therefore substantially higher than at larger airports.**

Leisure flights are also not distributed evenly over the week, there is a strong focus on weekends, especially on Saturdays.

This means that in order to welcome a given number of annual passengers a **higher peak capacity** is needed for leisure flights as the available production time is limited to the season and also limited to some days, whereas flights to hubs are more or less evenly distributed over the year and therefore a lower peak capacity is needed to welcome a given amount of annual passengers.

Graph 15 shows the monthly distribution of traffic of airports with LCC traffic serving as an outgoing airport for a large catchment area (Dortmund) and a typical summer-incoming airport (Dubrovnik).

GRAPH 15
MONTHLY PASSENGER DISTRIBUTION AT TWO SELECTED REGIONAL AIRPORTS



Source: ACI Traffic Data

Dortmund produces more than 1.9 million passengers with a maximum monthly peak of 185,567 passengers (ratio strongest/weakest month: 1.5). Dubrovnik also handles more than 1.9 million passengers but with a peak month with 382,897 passengers (ratio strongest/weakest month: 24.4). Dubrovnik, therefore, needs more than double the monthly capacity in order to have the same amount of passengers as Dortmund.

For regional airports with high seasonality, reducing costs and increasing charges are not necessarily feasible.

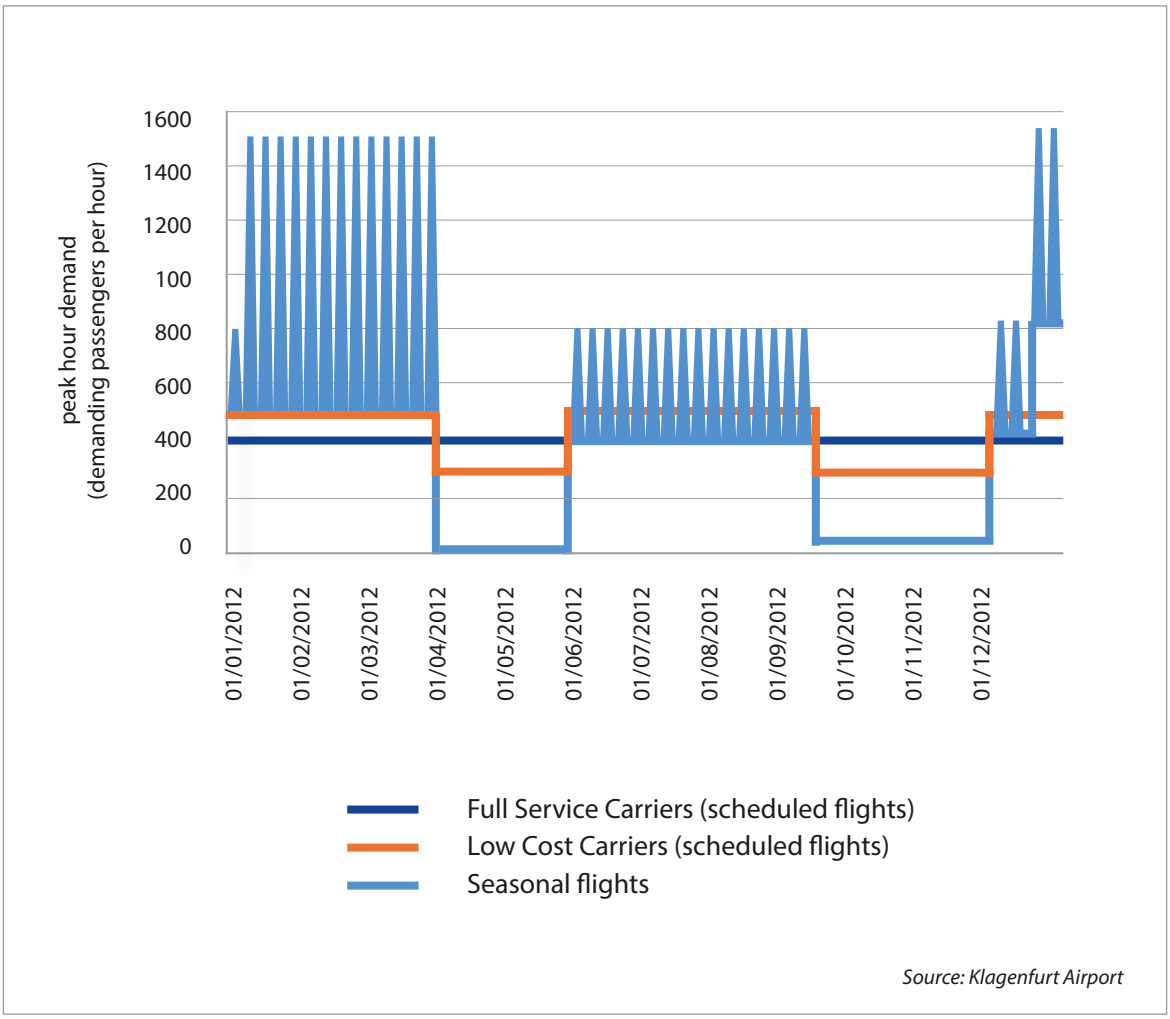
In order to provide peak capacity in passenger terminals airports have different options:

- Differentiation by market segmentation: provide capacity according to the needs of every market segment
- Accept quality reductions during peaks
- Operational measures
- Add temporary space solutions

a) Differentiation by market segmentation

An airport needs to analyse its passenger traffic structure very closely. As shown in the following graph, peaks of different segments occur at different dates.

GRAPH 16
TRAFFIC STRUCTURE AT KLAGENFURT AIRPORT



Source: Klagenfurt Airport

In this example the peak demand of the touristic segment is the highest whereas the demand for low cost and hub-feeding flights is rather low. Normally tourists need less space per passenger than passengers of other segments, because they travel in groups and tend to stand closer to each other. By providing less space per passenger to the touristic segment compared to those segments that use the airport over the year leads to substantial savings in terms of capacity provision.

b) Accept Quality Reductions

When peaks are rather high but for only a short period of time an airport may accept a limited reduction of its quality standards.

c) Operational Measures

By active flow management an airport can increase its capacity. However, the trade-off between extra operational costs and capital expenditures for permanent capacity needs to be analysed closely.

d) Add temporary space

Airports may add space by either building multi-use infrastructure that only serves for airport functions during the high season. Some regional airports, for instance, use some of their infrastructures on a seasonal basis; the rest of the year their facilities serve for different purposes (e.g. an event location). Other airports use semi-permanent buildings or even tents to provide short-term capacity.

Klagenfurt Airport / KLU

Airport networks, systems or groups

The management of airports can be done either on an **individual airport basis**, on an **airport system** or **group** basis, or on an **airport network basis**. An airport system or group is composed of two or more airports serving the same major metropolitan area and operated under a single ownership and control structure. An airport network is a group of airports within a State operated under a single ownership and control structure; it can include all airports serving the territory of this State or only some of these airports.

Globally, **69%** of States have some kind of airport network arrangement. In Europe, among the ACI EUROPE Regional Airports' Forum members, **365** airports are part of a network, system or group, which makes **78.3%** of all Regional Airports' Forum members.

Regional airports may **benefit from a common ownership**, regardless of whether they are public or private, which could include cross subsidisation within a context of decreasing availability of public funding for small, regional or remote airports.

An airport network, system or group may be a **valuable way to collectively managing airports** that, taken individually, would make loss, but are essential in achieving national development objectives (for instance access to remote regions).

In an integrated air transport system, airport networks, systems or groups provide **economies of scale** and facilitate **easier access to capital markets** as well as better management of capacity and use of resources.

Under hub-and-spokes and enhanced connectivity models, important economic synergies are generated between regional airports and hubs within a network. Regional airports act as catalysts in feeding traffic into hub airports. These network synergies generate value and cost efficiencies.

In the last years, airport networks, systems or groups have increased in importance in the European airport industry. Airport companies that manage multiple airports benefit from economies of scope and economies of scale, especially in relation to overhead costs. In many circumstances, these airport groups play a **pivotal role in implementing national development strategies** from economic and social viewpoints.

365 **Number of airports, among the ACI EUROPE's Regional Airports' Forum, that are part of a network, system or group, which makes 78.3% of all Regional Airports' Forum members.**

Airport networks in European legislation: Directive 2009/12/CE on Airport Charges

Recital 5. In order to promote territorial cohesion, Member States should have the possibility to apply a common charging system to cover an airport network. Economic transfers between airports in such networks should comply with Community law.

Article 2.5. 'airport network' means a group of airports duly designated as such by the Member State and operated by the same airport managing body.

Article 4. Airport network
Member States may allow the airport managing body of an airport network to introduce a common and transparent airport charging system to cover the airport network.

La Palma Airport / SPC

PICTURE 4 - **EUROPEAN AIRPORT NETWORKS, SYSTEMS OR GROUPS (ACI EUROPE'S MEMBERS ONLY)**

	Number of ACI EUROPE's airport members	
BULGARIA	2	Fraport Twin Star Airport Management AD
CYPRUS	2	Hermes Airports Ltd
DENMARK	2	Københavns Lufthavne A/S
FINLAND	21	FINAVIA Corporation
FRANCE	16	Edeis
	11	VINCI Airports
	4	Keolis Airport
	3	Côte d'Azur: Société Aéroports de la Côte d'Azur
	3	Paris: Groupe ADP
	2	Bastia & Calvi: CCI de Bastia et de la Haute-Corse
	2	Lyon: Aéroports de Lyon SA
FYROM	2	TAV Airports Holding Co.
GEORGIA	2	TAV Airports Holding Co.
GERMANY	2	Flughafen Berlin Brandenburg GmbH
GREECE	29	Hellenic Civil Aviation Authority
	14	Fraport Greece
ICELAND	1	ISAVIA
IRELAND	2	daa
ISRAEL	7	Israel Airports Authority
ITALY	4	Puglia: Aeroporti di Puglia
	4	SAVE SpA
	2	Rome: Aeroporti di Roma S.p.A
	2	Milan: S.E.A. S.p.A.
	2	Verona: Aeroporto Valerio Catullo di Verona S.p.A.
	1	Toscana Aeroporti
LITHUANIA	3	State Enterprise Lithuanian Airports
MONTENEGRO	2	Airports of Montenegro
NETHERLANDS	2	Royal Schiphol Group
NORWAY	46	AVINOR AS
POLAND	6	Polish Airports State Enterprise (PPL)
PORTUGAL	10	Aeroportos de Portugal S.A. / VINCI Airports
ROMANIA	2	Aeroporturi Bucuresti S.A.
RUSSIA	7	NOVAPORT LLC
	4	CJSC MC "Airports of Regions"
SPAIN	46	Aena
SWEDEN	34	Swedish Regional Airports
	10	Swedavia AB
TURKEY	42	General Directorate of State Airports Authority (DHMI)
	5	TAV Airports Holding Co.
UK	4	The Manchester Airports Group (MAG)

365

3.3 THE IMPORTANCE OF COMMERCIAL REVENUES

Regional airports operate in a **highly competitive market** in which airlines have significant market power. At many regional airports there is a high reliance on one or two major carriers typically operating route networks encompassing many different bases. By way of illustration, the turnover of a major Low Cost Carrier is more than 100 times greater than that of an average 5-10 million passenger airport.

Air carriers' assets are by their very nature **mobile** and the **threat of redeploying their aircraft elsewhere is a powerful negotiating tool** to drive down airport charges. The reduction in seat capacity or withdrawal of particular routes also impacts the airport's profitability, with **20%** of Europe's air routes subject to regular churn. Low Cost Carriers, which typically represent the majority of traffic at regional airports, are most prone to launching and dropping routes.

For these reasons, regional airports have seen **downward pressure on aeronautical charges**, thus **increasing the importance of commercial revenues**. For most regional airports, the concept of the dual till[6] is largely hypothetical since there is little scope to pass on regulatory and other costs. Commercial revenues are therefore important to the profitable operation of regional airports. They contribute to the cash-flow and overall returns required in order to support investment in the aeronautical infrastructure necessary to deliver increased capacity for a growing aviation market.

Generating commercial revenues requires significant investment. Customers are increasingly demanding, with social media making it easier to highlight poor service or seek compensation in the event of a bad experience. In addition, regulators take a close interest in the performance of airports for specific consumers, such as passengers with reduced mobility. Airlines are also beginning to compete in areas traditionally owned by airport retailers (e.g. Thomas Cook's Airshoppen, which is advertised as being "cheaper than the airport"). Satisfying customers and regulators in this competitive environment requires a strong focus on facilities and customer services.

It is a well-established fact that revenues from non-aeronautical activities such as retail, F&B, car rental, car parking, advertising and real estate are a core element of airport's income streams. It is generally the case also that **smaller airports do not have the same commercial revenue generating opportunities as their larger counterparts**. This is primarily due to the fact that the **passenger profile** at these airports is different. In particular, passengers using regional airports tend to be **less affluent** than those using larger airports. Moreover, the **customer base being smaller in volume** does not support the same kind of diversification and offering in retail and F&B. This obviously impacts revenue generation potential.

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6. Dual till system: the airport has the right to recover the cost for the facilities and services provided to the airlines under the ICAO principles via airport charges. The pure commercial revenues are separated from airport charges. Commercial revenues are used for investments in the global airport infrastructure.
Single till system: all revenues of the airport, both aeronautical and commercial, are part of the same system. Commercial revenues serve to decrease airport charges. Vast majority of regional airports in Europe operate under single till system.
7. ACI EUROPE Analysis Paper: *Factors Influencing Economic Sustainability of Small Regional Airports* - Issued at the 21st Meeting of the ACI EUROPE Regional Airports' Forum & the 8th ACI EUROPE Regional Airports' Conference & Exhibition in Reykjavik, May 2015.


Nice Côte d'Azur Airport / NCE


Mortadella
Salame Casereccia
Bologna Airport / BLQ


Let's go for a
RIDE
This season
WIN 10 CITY BIKES
and
100.000 GIFT VOUCHERS*
FRAGRANCES
SOUVENIRS
FROM
TRANSYLVANIA
Bologna Airport / BLQ
Târgu Mureș Airport / TGM

3.4 NEGOTIATING WITH POWERFUL AIR CARRIERS & ALLIANCES

Convincing an airline to establish a new air service to/from a regional airport can be a **demanding and lengthy process**, involving sustained **collaboration with a wide range of external partners** – such as tourism authorities, foreign direct investment agencies, the local business community and regional or national governments.

Recent market developments[8] have shown that air traffic growth has been predominantly driven by new services and additional capacity from **European Low Cost Carriers (LCCs)**, mainly on intra- European routes. These airlines operate flexibly on a pan-European basis, moving their assets in search of the best market conditions. This means that they are able to exercise **considerable pressure over airports** as they are prepared and able to reposition their aircraft between different locations at short notice. Also, LCCs have sought to **move upmarket** by improving their quality of service and above all, expanding into hub airports and therefore occasionally abandoning or reducing capacity at some of their "traditional" bases at regional airports. This move has been particularly disruptive, dialling up the competitive dynamics between regional and hub airports in a way few would have foreseen a few years ago.

At the same time, traditional **Full Service Carriers (FSCs) have sought to replicate the success of LCCs**. This has involved establishing or further developing their own LCC

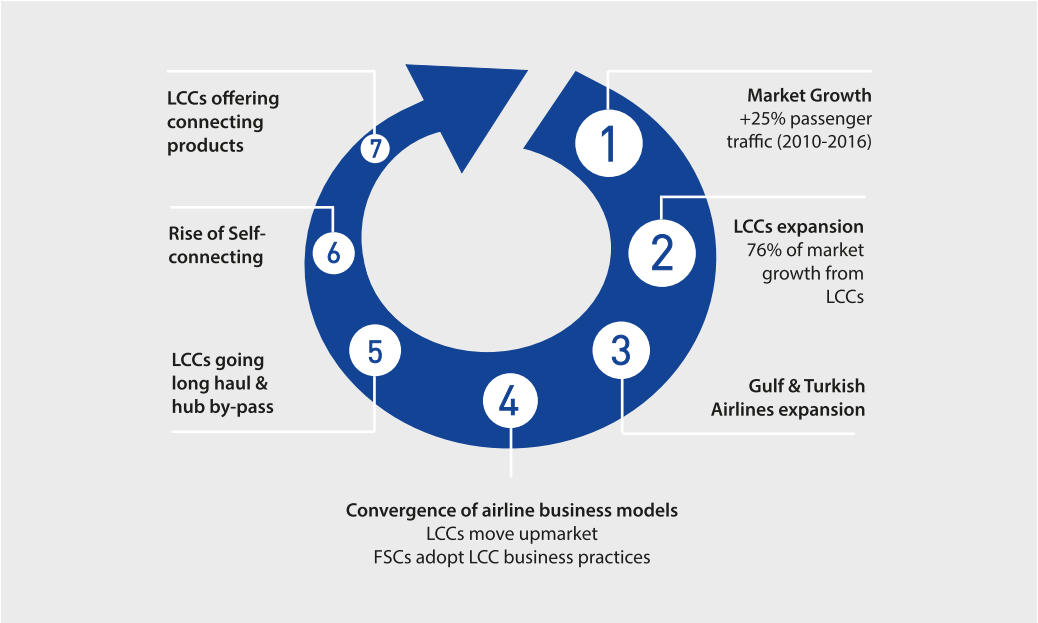
Glasgow Airport / GLA

8. *The Continuing Development of Airport Competition in Europe*, Oxera (2017) and ACI EUROPE Synopsis Publication *The Competition Edge: Airports in Europe* (2017).

(Air France-KLM with Transavia and Joon, IAG with Vueling and LEVEL and Lufthansa Group with Eurowings) and expanding their presence in regional airports. In doing so, FSCs have increasingly replicated the behaviour of LCCs vis-à-vis regional airports – in particular when it comes to negotiating tactics.

For some larger regional airports, the expansion of 'super connector' airlines, which operate from hubs in the Gulf and Turkey, offer an important potential source of growth from airlines with sophisticated negotiating teams. Seat capacity to and from Abu Dhabi, Doha and Dubai airports increased by +106%, +119% and +85%, respectively, between 2010 and 2016 from and to all ACI EUROPE's member airports. Istanbul Airport also more than doubled its total seat capacity during this period.

PICTURE 5 - **MARKET DRIVERS OF AIRPORT COMPETITION 2010-2016**



In order to market itself to airlines effectively, a regional airport needs to:

- Regularly **assess and research the features & benefits of its catchment area**. Key information of interest to airlines includes: the population living within 1 hour and within 2 hours of the airport; how they get to the airport; the demographics & economic positioning of that population; significant employers in the region and the kind of international connectivity they require; tourism and other special attractions such as seasonal festivals.

- **Incentivise airlines to develop at their location**. Airports have broadened the scope of their **incentive schemes** over time to include almost any channel through which additional passengers might be gained (e.g. new routes, larger aircraft or increases in load factors). There is a high uptake of incentive schemes, with a majority of traffic at some airports attracting some form of incentive.

- **Support the marketing activities of airlines** once routes are established. This support ranges from press releases for new routes on airports' websites to a marketing budget per airline. In the latter case, the airport might either directly organise advertising for the airline or reimburse the airline for some marketing expenses incurred.

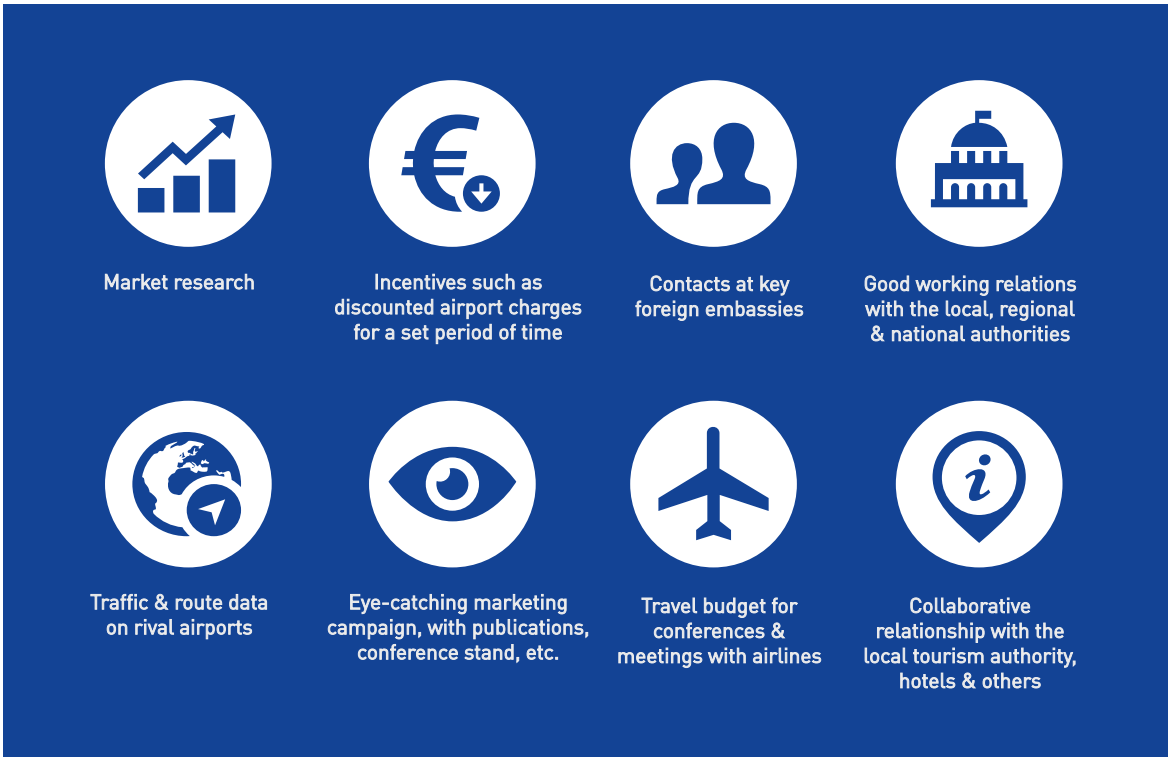
- **Ensure their operational processes & infrastructure are efficient**, and can be **tailored** – if possible - to the requirements of specific airlines.

- **Ensure there is enough capacity to accommodate future growth.** In this regard, airport charges are just one side of the economic equation of operating at an airport for airlines.

In all these aspects, **airports are business-to-business suppliers**, and like all suppliers, big customers can squeeze them for more, while smaller customers can bring the extra volume that can end up making the difference between a profit or loss at the end of the year.

All these network development & marketing strategies are now a must for regional airports across Europe. They are per se **symptomatic of airport competition** - as is the fact that European airports end up spending a lot of money to attend and exhibit at the ROUTES Conferences, which are events dedicated to air route development where they are literally courting airlines (who attend for free).

PICTURE 6 - **TOOLKIT OF AN AIRPORT ROUTE DEVELOPER**



3.5 SUPPORT FROM TOURISM AGENCIES TO PROMOTE REGIONS

Tourism agencies can support traffic development at regional airports in a number of ways as follows:

PICTURE 7 - **SUPPORT FROM TOURISM AGENCIES**

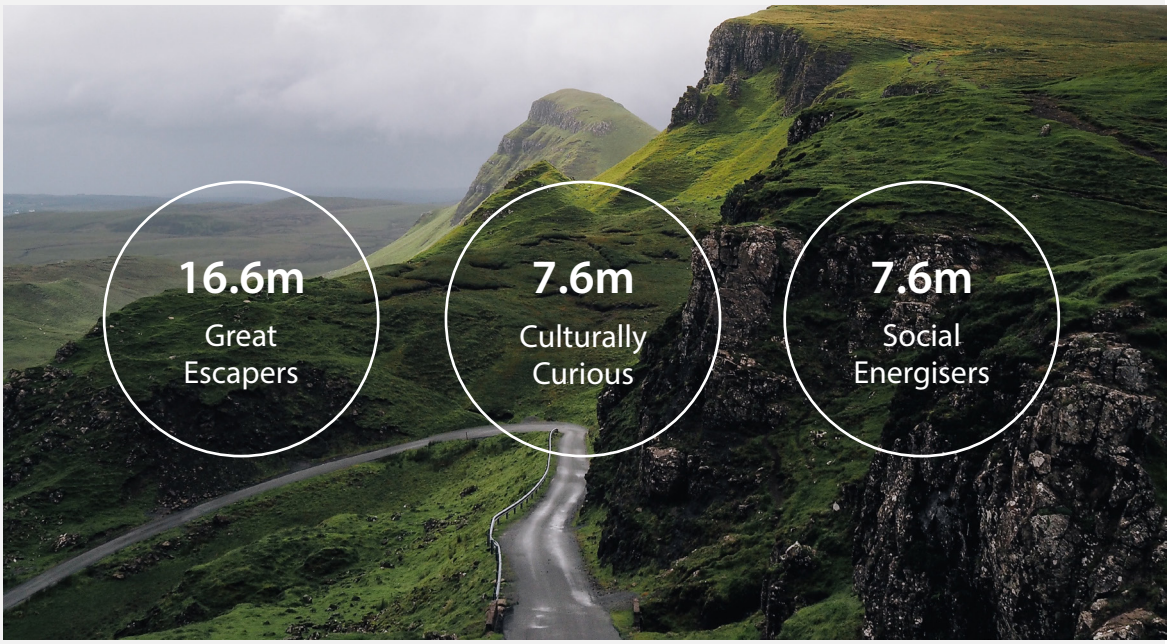
Items 1, 2 and 4 above can be legitimately fully funded by regional or national tourism agencies in accordance with EU State Aid rules. Item 3 is usually co-funded up to 50% by national or regional tourism agencies in accordance with EU State Aid rules where this model operates. Collaborative marketing campaigns, as described above, can be hugely effective to stimulate demand on new routes, boost traffic at shoulder periods or help to regionally distribute tourism away from capital cities to less congested regional airports. Examples of each of the above in an Irish inbound tourism context are set out below:

1

Example of market research inbound from German market to Ireland from Irish national tourism agency (Failte Ireland) as well as supporting analysis down to tour operators, etc.

A SNAPSHOT OF THE GERMAN MARKET

Size of the segments



Size and potential of the market for Ireland

- The world's second largest outbound travel market (after China); 53% take a holiday abroad
- Ireland gets 1% of German outbound market
- Ireland's 3rd largest source market; 483,000 visitors in 2013, up 7.7% over 2012
- Activity is important for many; 28% take part in hiking/walking and Germany is the largest market for overseas anglers, which accounts for 15% of all overseas angling visits
- 68% of outbound market have expressed an interest in visiting Ireland in the future

2

Example of marketing support provided by the Irish national tourism agency (Failte Ireland) to provide a sense of place in the terminal and promote regional attractions.

Fáilte Ireland

3

Examples of targeted marketing campaigns organised between the airport, airline and national or regional tourism offices to stimulate or grow inbound demand.

4

Familiarisation trips for journalists and tourism stakeholders.

CORK AIRPORT

WILD ATLANTIC WAY

SLÍ FHIÁIN AN ATLANTAIGH

3.6 MAINTAINING OPEN MARKET ACCESS / OPEN SKIES

For regional airports, increasing the number of destinations served and attracting more passengers and cargo through the **development of their route network** and the **diversification of their airline portfolio** is a **core business imperative**. It is also central to their societal benefits – which are about maximising air connectivity for their communities and supporting economic growth and job creation.

The **abolition of regulatory restrictions** on designated airlines, route rights, capacity and pricing has not only allowed airlines to choose their business model and innovate – it has also given airports **equal and increased opportunities in terms of route development**. For regional airports, this has resulted in the development of new and competitive air services with passenger numbers growing by over 170% since 1993.

European regional airports call for the European Union and Member States to actively support air connectivity, in particular by **eliminating restrictions to air traffic rights and ensuring free market access for EU and foreign airlines** – for both passengers and cargo. The 2006 EU-US "Open Skies" aviation agreement has demonstrated the benefits of pursuing such a policy. This agreement has been followed by several air transport agreements with the neighbouring countries (ECAA) and euro-mediterranean countries. The agreement with Morocco illustrates the real benefits of Open Skies. Combined with the technically tailored aircraft, all these agreements have opened the legal possibility for European regional airports to put an end to the restrictive markets which were prevailing.

This precedent needs to be replicated, primarily with the EU main trading partners and with the objective of:

- Liberalising market access on international routes and
- Achieving regulatory convergence

Cork Airport / ORK

3.7 THE IMPACT OF AVIATION TAXES

Regional airports – along with the rest of ACI EUROPE's members - are concerned by the proliferation of aviation taxes in several European countries, often portrayed as environmental levies. In reality, these so-called "green" taxes are instruments for public revenue generation, and rarely deliver any significant environmental benefits. These national taxation schemes should be repealed where they exist and they should not be introduced in other countries. At the very least, the revenues generated through these taxes should be invested directly back into the industry for infrastructure improvement and/or research into new technology.

Overall, **national aviation taxes have a severe negative impact on the economy and may endanger the economic recovery of a particular region**. Moreover, such taxes are not socially sustainable, as they usually impact lower income groups in a disproportionate manner due to their flat-rate character.

Several EU Member States have introduced or plan to implement specific aviation taxes at national level. Some countries have also increased the level of their aviation tax to generate additional revenues. Conversely, a number of countries have withdrawn plans to impose a tax on aviation or have abolished existing taxes following an assessment of its very negative impact on the economy.

The main rationale for most aviation taxes is to generate additional revenues for the general budget of a country. Unfortunately, the funds raised are typically not reinvested in projects aiming at reducing the environmental impact of aviation.

Evidence suggests that the **economic impact of the taxes on the economy as a whole largely outweighs the expected return from the tax**. Overall, taxes discourage travel, reduce the connectivity of regions, lead to job suppression, damage the European economy as a whole and put the sector at a competitive disadvantage with other World regions.

In addition, it should be noted that already today European airports largely finance their infrastructure themselves, both through airport user charges and revenues from commercial activities. There is limited public funding involved in large infrastructure projects – the sector pays the full bill for the construction of its infrastructure, in stark contrast to other modes of transport.

TABLE 5
OVERVIEW OF AVIATION TAXES IN EUROPE

Country	Period	Amount	Comments
Austria	2011- today	€7 - €15 - €35 per passenger	Air Transport Levy (halved from 1 Jan 2018)
Belgium	2008	€40 per passenger	Proposal (withdrawn)
Bosnia and Herzegovina	2017- today	€0.51 (2017) – €1 (2019) – €1.5 (2019) per passenger and €10 (2017) – €15 (2018) and €20 (2019) per ton of goods/cargo	Aviation tax
Croatia	2010 - today	€0.02 per kg of goods/cargo and between €0.68 and €1.37 per passenger	Civil Aviation tax
Denmark	1998 - 2007	€10 per passenger	Transportation tax (repealed)
France	1999 - today	€4.44 - €8 per passenger	Civil aviation tax
	2006 - today	€1.13 - €45.1 per passenger	Solidarity tax
Germany	2011 - today	€7.4 – 23.1 - €41.5 per passenger	Air Passenger tax
Ireland	2009 - 2014	€3 per passenger	Air Travel tax (repealed)
Italy	2004 - today	€6.5 – €7.5 (Rome) per passenger	Municipal tax
	2012 - today	€10 - €100 - €200 per passenger and per leg	Luxury tax (for general aviation)
Netherlands	2008 – 2009	€11.25 - €45 per passenger	Aviation tax (repealed)
Norway	1978 - 2002	€8.8 per passenger	Air Passenger tax
	2015 - today	€8.8 per passenger	Air Passenger tax
Portugal	2014	€3 per passenger	Proposal
Serbia	2011- today	€0.98 per passenger	Passenger tax
Sweden	2016	€8.5 - €45 per passenger	Proposal
UK	1994 - today	€13.2 - €186 per passenger	Air Departure tax

3.8 THE IMPACT OF EUROPEAN LEGISLATION

The multiple layers of legislation are difficult to implement for regional airports in a cost-effective manner. Regulations do not have the same economic impact on hubs and regional airports, the latter being less well-staffed and resourced to deal with the regulatory avalanche.

Regulations have cumulative effects. These effects are not limited to the sum of static costs associated with each piece of legislation. The accumulation of regulation over time leads to distortion of investment choices and growth.

ACI EUROPE and its Regional Airports' Forum have been advocating the "one-size-does-not-fit-all" approach. While European policy makers have often recognised the importance and the specific nature of regional airports as well as the needs stemming from them, this has not always been reflected to the full extent possible in the legislation.

Due to European legislative procedures, the negotiation and adoption of each piece of legislation is often the result of a long bargaining process between the institutions. The scope of these legislation is not the exception. Table 6 shows an overview of the thresholds that aim at ensuring a special treatment for regional airports.

Cornwall Airport Newquay / NQY

TABLE 6
OVERVIEW OF THE SCOPES OF EUROPEAN LEGISLATION

Area	Legislation	Scope
Aviation Security	Security procedures for airside areas Regulation (EU) 2017/815 of 12 May 2017 amending Implementing Regulation (EU) 2015/1998 as regards clarification, harmonisation and simplification of certain specific aviation security measures	The appropriate authority may allow special security procedures or exemptions … at airports on days on which there is not more than one aircraft to be loaded, unloaded, boarded or disembarked at any one time either within the critical part of the security restricted area
Facilitation	PRM Regulation (EU) 1107/2006 of the European Parliament and of the Council of 5 July 2006 concerning the rights of disabled persons and persons with reduced mobility when travelling by air	150,000 ppa for the obligation to set quality standards for the assistance
	Passenger Rights (under revision) Regulation (EC) 261/2004 of the European Parliament and of the Council establishing common rules on compensation and assistance to passengers in the event of denied boarding and of cancellation or long delay of flights, and repealing Regulation (EEC) No 295/91 Regulation (EC) 2027/97 of 9 October 1997 on air carrier liability in the event of accidents as amended by Regulation (EU) 889/2002	To be defined: 1,5 mppa, 3 mppa or 5 mppa for the obligation to set contingency plans

Economics	Airport charges Directive 2009/12/EC of the European Parliament and of the Council of 11 March 2009 on airport charges	>5 mppa & the airport with the highest passenger movement in each Member State
	Groundhandling Directive 96/67/EC of 15 October 1996 on access to the groundhandling market at Community airports	2 mppa to open market to third party handlers
	State Aid Article 107 of the Treaty on the Functioning of the European Union	<3 mppa: operating aid <5mppa: investment aid
Safety	Aviation Safety (EASA) Regulation Regulation (EC) 216/2008 of the European Parliament and of the Council of 20 February 2008 on common rules in the field of civil aviation and establishing a European Aviation Safety Agency, and repealing Council Directive 91/670/EEC, Regulation (EC) No 1592/2002 and Directive 2004/36/EC	Aerodromes open to public use, serving commercial air transport that have a paved runway of 800m
Environment	Environmental Noise Directive (noise mapping and action planning) Directive 2002/49/EC of the European Parliament and of the Council of 25 June 2002 relating to the assessment and management of environmental noise	50,000 civil aircraft movements pa
	Noise-related operating restrictions within a balanced approach Regulation (EU) 598/2014 of the European Parliament and of the Council of 16 April 2014 on the establishment of rules and procedures with regard to the introduction of noise-related operating restrictions at Union airports within a Balanced Approach and repealing Directive 2002/30/EC	50,000 civil aircraft movements pa

Economics

Airport charges

The European Union Directive on Airport Charges[9] establishes the common European rules for economic regulation of airports, applying to all airports with more than 5 million passengers per annum (mppa) and the largest airport in each Member State. 79 airports fell within its scope in 2015, 48 of them are regional airports (61%).

The Airport Charges Directive requires airports to consult with airlines before setting new levels of airport charges. To ensure an informed consultation, transparency provisions require airports to make available specific financial and operational information, and also require airport users to make available their plans with airports. Each Member State has an independent regulator. If airlines are not satisfied with the proposed charges, they can appeal to this regulator, who will make a final decision. In many Member States, these core requirements are the basis for more elaborate regulatory frameworks which place additional requirements upon the airport.

While the objectives of the Directive can be welcomed, the reality of implementation is that **the Directive applies a regulatory framework based on presumptions of market power to many airports without actual consideration of the airports' competitive position. As such, the Directive places a large regulatory burden on airports. This is a direct cost in terms of manpower and time to regional airports.** Airlines appeal procedures to a supervisory authority, facilitated by the Directive, has replaced the development of true commercial discussions between airports and airlines, because in many cases airlines believe that they can obtain a better outcome (lower charges) through regulatory intervention.

For regional airports, proportionate regulation of airport charges is important because these charges are required to maintain and expand airport capacity, and to ensure adequate levels of passenger service quality – in line with the "user pays" principle. This is essential for the development of air connectivity in the long term.

ACI EUROPE has proposed a more tailored legislative approach which would consider the actual **competitive position of an airport**, rather than the number of passengers, before applying intrusive economic regulation. This is based on the fact that airport competition has now become an established reality, resulting in significant competitive pressure for the airport industry overall.

ACI EUROPE's research has demonstrated that most airports face significant competitive constraints on their airport charges from passengers, airlines and other airports. Passengers have the ability to switch airports where there are multiple airports in a catchment area or switch to other modes of transport. Airlines have the ability to re-base

9. Directive 2009/12/EC of the European Parliament and of the Council of 11 March 2009 on airport charges

aircraft if they believe charges are too high, and in airports where an airline makes up a significant share of the traffic, to use their buyer power to push for lower charges. Airports themselves can offer rates, incentives and discounts to attract airlines and aircraft from other airports when destinations have some substitutability, for example overlapping catchment areas and sun and snow destinations. Passengers, airlines, and airport behaviour together work to place many regional airports in a competitive environment.

This position is fully in line with the European Commission's policy for State Aid to airports of 2014, which specifically seeks to avoid the distortion of competition between Europe's airports. While the EU's Aviation Strategy has recognised airport competition, this has yet to be reflected in the EU's regulatory control of airport charges.

The "one-size-fits-all" approach of current regulation fails to address the needs and recognise the realities in which regional airports operate. The challenge for aviation regulators now is to facilitate the potential for genuine industry cooperation which exists today. While this is by no means an easy task, regulatory experience in certain jurisdictions has provided us with a roadmap to follow. It is now incumbent upon regulators to seize the opportunity that this represents, and to deliver a fit-for-purpose framework for today's increasingly competitive air transport market. **ACI EUROPE is working to ensure that any future regulatory framework on airport charges should reflect this via Airport Market Power Tests as well as proportionate & objective regulation.**

Grenoble Alpes Isère Airport / GNB

State Aid

Taking into account the evolution of the aviation sector (increased airport competition and more mature market for Low Cost Carriers), the European Commission issued in February 2014 new guidelines on State aid to airports and airlines. These guidelines[10] refer to the financing of airports for infrastructure and their day-to-day operations as well as the start-up aid granted to airlines departing from regional airports.

The Commission's guidelines apply only in case of public money granted as a subvention i.e. when the public actor is not delivering as a private investor expecting a return on its investment.

In 2017, as part of its "Global New State Aid Modernisation Initiative" conducted by President Juncker to stimulate economic growth and upon request of ACI EUROPE, several national associations and some Member States, the European Commission decided to simplify the rules on State aid with less administrative burden and more flexible procedures in closer link with the economic reality. Within the framework of the **revision of the ''Global Block Exemption Regulation'' (GBER)**, it has thus been decided to include airports and ports as part of the GBER.

In the GBER revision, the European Commission, indeed, recognises that public aid for investment in airport infrastructure may improve the accessibility of certain regions as well as local development, defended at length by the European airports community. It also highlights the need to avoid heavy administrative burden and grant more flexibility for situations that do not lead to high risk of distortion of competition at EU level, as requested by European airports during the consultation procedure. In counterpart, it will be the role of the Member State to maintain records of the aid granted and the necessary documentation establishing that the different conditions related to the exemption are fulfilled. The GBER revision still remains very conservative regarding operating aid to regional airports, but it introduced more flexibility regarding the aid for future investments. The current situation is the following:

Operational aid

Based on the Market Economy Operator Principle (MEOP), the European Commission's goal is to limit operational aid to regional airports under 3 mppa to strict and cumulative - but often not unexcelled - conditions (objective of common interest, aid needed and appropriate with an incentive effect on the economic activity of the airport and absence of adverse effects on competition). **The amount of aid is limited to 50% of the initial funding gap over the 2009-13 period for a ten years' period with the aim to put an end to any operational aid by 2024. However, airports under 700,000 ppa may today benefit from operating aid up to 80% of the initial operating funding gap for a five year period until 2019.** For ACI EUROPE, national associations and several

10. Generally speaking, the guidelines reflect the position of the European Commission at a certain moment taking into account the evolution of the market and the jurisprudence of the European Court of Justice.

Members States, the announced end of operational aid at medium term is far to reflect the reality of the regional airports' environment and should lead to the closure of many small regional airports in Europe. **Regional airports hope that the European Commission's declarations on the need to improve accessibility of certain regions will be taken on board in the revision of the Guidelines.**

The GBER introduced a bit more flexibility regarding the notification of the operating aid. The absence of notification, which was possible only for those airports with a well-defined objective of common interest (SGIE), is now allowed for all types of airports with less than 200,000 ppa. This threshold of exemption for operating aid was raised from 50,000 ppa **to 200,000 ppa**, subject to conditions of proportionality, non-discrimination, absence of relation with the conclusion of arrangements with specific airlines. The improvement is welcome even if it is far to be the level requested by ACI EUROPE, national associations and several Members States.

Investment aid

Investment in infrastructure may benefit from aid for airports up to 5 mppa (and for bigger airports in the case of relocation or exceptional circumstances). The granting of aid is subject to conditions (needed, proportionate with an incentive effect) and its intensity is proportionate (from 25 to 75% of the investment) to the traffic served. More flexible conditions may apply for airports located in peripheral regions.

As a general rule, any public financing of airport infrastructure which is likely to constitute state aid must be notified.

Individual notification is required in most cases, especially in the case of bigger airports, relocation, airports with mixed passenger-cargo traffic or in the frequent situation of another airport located in the same catchment area. In other cases, **Member States are encouraged to notify by schemes**. Furthermore, in 2017, **the GBER extended the possibility to exempt from prior notification airports with less than 3 mppa subject to conditions. For the smallest airports (less than 200,000 ppa), the exemption applies even if another airport operates scheduled services in the same catchment area when the objective of the financing is not to increase the traffic above this threshold**. According to ACI EUROPE, the exemption of notification is still too limited in scope, leading to heavy administrative procedures for small airports, and not useful when the risk of distortion of competition is very low.

Start-up aid to airlines for new routes may be allowed in specific conditions and at airports with less than 3 mppa located in the Common European Aviation area (including Norway, Iceland and Balkan countries). This aid is **now limited to 50% of the airport charges** for a three years' maximal period of time.

Guidelines are reflecting the position of the Commission at a given period, taking into account especially the evolution of the market and the degree of competition between airports and between airlines using these airports. From 2014, when introducing the new guidelines, the European Commission announced its intention to assess the

rules related to operational aid to regional airports. This evaluation, initially planned for 2018, could be postponed and joined to a global revision of guidelines due to the new evolution of the market.

The ACI EUROPE *Manual for Implementation of 2014 Aviation State Aid Guidelines* (updated in 2017 with the Global Block Exemption Rules - GBER) is available in the Members' Room of the ACI EUROPE website (Members' Library section).

Operations and safety

EASA and aerodrome safety

The 2009 review of the EU Aviation Safety Regulation extended the powers of EASA to include safety at aerodromes, as well as ATM and air navigation services. Aerodromes with a paved runway of 800 metres or more, which welcome over 10,000 commercial passengers per year, fall under the scope of EASA Aerodrome Rules and EU Implementing Regulation 139/2014.

Aviation authorities are currently finalising the certification of airports which covers the infrastructure design elements (CS) originating in ICAO Annex 14 as well as organisational (Part-OR) and operational (Part-OPS) requirements.

Regional airports themselves are working hard to conclude their certification according to EASA rules by the 2017 EU deadline. Several of them are making use of the dedicated ACI EUROPE "Aerodrome Rules Implementation Exchange" that was set up to help airports exchange best practice. Generally speaking, regional airports do not want to see a "one-size-fits-all" compliance-based regime that overlooks each airport's special situation. They reiterate that individual **safety risk assessments must be taken into consideration in the implementation of the EU Regulation 139/2014: the "one-size does-not-fit-all" approach must prevail**. The flexibility instruments provided by the EU Regulation, like Equivalent Level of Safety (ELOS) or Special Conditions (SC), must be utilised provided such changes are supported by a safety case or appropriate justification.

Runway and safety areas

ICAO Annex 14 (Aerodromes) has a section dealing with the dimensions of Runway End Safety Areas (RESA). The ICAO standard is that a RESA should extend from the end of the runway strip to a distance of at least 90m. However, there is an ICAO Recommendation that, dependent on the aerodrome classification code number, a RESA should wherever practicable extend to 120m or 240m.

EASA rules have incorporated the ICAO Standard but state that "as far as practicable" national authorities implement the Recommendation of 120m or 240m[11]. This could have a significant impact for many regional airports which, due to physical constraints, are unable to extend their RESAs without reducing the available runway strip/length. Obviously, such new restrictions could have significant adverse repercussions on carriers using these airports. **Regional airports believe that the non-mandatory nature of the 240m RESAs should be reflected in practice and that competent authorities need not apply EASA guidance as hard law.**

Burgas Airport / BOJ

Visby Airport / VBY

11. EASA Certification Specifications for Aerodromes Design, CS ADR-DSN.C.215 Dimensions of runway end safety areas.

Airport slots

Connectivity to big hubs is essential for regional airports and is increasingly under threat. Regional airports therefore expect the subject of connectivity to big hubs to become an increasingly important issue which will need to be addressed during the current review of the EU Slot Regulation and may need to be reviewed against existing and any changes to the Public Service Obligation (PSO) requirements.

Single European Sky and SESAR

The Single European Sky legislative package II (SES-II) covers the whole airport community and focuses mainly on Safety (through EASA), Capacity, Gate-to-Gate and Research for new technologies to improve the traffic flow and integrate airports into the ATM network (through the Network Manager).

The integration of regional airports into the ATM network will require investment from these airports. These investments will result in benefits for the European network, but not necessarily for the airport concerned. As a result, **it will be absolutely crucial for regional airports to secure sufficient European funding to make the necessary investments for example for Advanced Towers and Regional A-CDM solutions.**

Under the research which is carried out by the SESAR Joint Undertaking (Single European Sky Air Traffic Management Research), regional airports will benefit from projects like remote towers, enhanced capacity as well as improved operational procedures.

Stuttgart Airport / STR

Passenger Rights

Regulation (EC) No 261/2004 establishing common rules on compensation and assistance to passengers in the event of denied boarding and of cancellation or long delay of flights and Regulation (EC) No 2027/97 on air carrier liability in respect of the carriage of passengers and their baggage by air are under revision since 2013. Together with other aviation files, the Council has not been able to reach a common position on this matter.

For regional airports, it is essential that the adopted revision takes into account the specificities of smaller regional airports when defining the threshold above which airports will be obliged to set contingency plans in cases of disruption of air traffic.

The practice adopted by some carriers, allowing passengers to carry only one single piece of hand luggage on board, has led to a deterioration of the travel experience for many passengers. The lack of recognised passenger rights in relation to this issue affords some carriers the opportunity to arbitrarily adopt ever changing policies on cabin bag allowance, causing confusion among passengers and destroying a wider economic activity, particularly at regional airports. **The Council will hopefully include the ban on the so-called "one-bag-rule" in the revision of the passenger rights Regulation, as did the European Parliament in first reading, in line with ACI EUROPE's position.**

Security

Current EU regulations include a specific provision for small regional airports as follows:

The derogation for small airports was changed in the last amendment to Regulation 2015/1998. It allows more flexibility for small airports as the previous requirements limited **the derogation to airports with less than 8 planned departing flights per day**. The new change (below) was effective from 1 June 2017.

"Without prejudice to the criteria for derogations as set out in Part K of the Annex to Commission Regulation (EC) No 272/2009*, the appropriate authority may allow **special security procedures or exemptions for the protection and security of airside areas at airports on days on which there is not more than one aircraft to be loaded, unloaded, boarded or disembarked at any one time either within the critical part of the security restricted area or at an airport that falls outside of the scope of point 1.1.3.".**

Another provision was changed as follows: **"Critical parts shall be established at airports where more than 60 persons hold airport identification cards giving access to security restricted areas."**; The previous measure required a critical part to be established at airports where more than 40 persons held airport ID cards.

Current EU regulations allow a range of alternate means of screening that allow regional airports to select the most cost effective screening method for staff, passengers and cabin baggage. However, as of 31 December 2016 airports under

500,000 passengers were required to purchase new Liquid Explosives Detection Systems (LEDS), as the derogation to allow alternative means of screening LAGs expired. Likewise, the derogation for small airports with less than 500,000 passengers to screen passengers and cabin baggage without the requirement to use Explosive Trace Detection (ETD) equipment expired on 1 February 2017. Both the LEDS and ETD equipment costs between 25,000 – 50,000 euros for each unit; small airports will have had to buy at least one piece of LEDS and ETD equipment.

ACI EUROPE chairs a "Small Airports Working Group" to examine all aspects of security requirements for regional airports, with participation of airports and a number of national regulators. Any changes agreed, through the working group, by the Civil Aviation security Regulatory Committee will not take effect until 2018.

Bristol Airport / BRS

Environment

Most of the impacts caused by airport activities on the environment are not specific to aviation, and therefore covered by transversal, cross-industry legislation at the EU level. Furthermore, most of these impacts being of local nature, dedicated national and local regulations do also play an important role, and usually translate into specific requirements of Environmental Impact Assessments that are a pre-requisite to the operation of airports in the EU.

Noise

According to data of the European Environment Agency, it is currently estimated that around 4 million people are exposed to potentially harmful levels of noise around airports[12]. Even though this is significantly less than the noise exposure caused by road (100 million people) and rail traffic (11 million people), noise exposure around airports is a serious issue that is also being addressed by dedicated EU regulation. Two pieces of legislation are of relevance here: the Environmental Noise Directive (Directive 2002/49/EC) and the Regulation on noise-related operating restrictions at EU airports (Regulation 598/2014). Both texts apply to airports with more than 50,000 civil aircraft movements per year.

The Environmental Noise Directive requires Member States to map exposure to noise around major infrastructure, such as airports, and to subsequently establish and update Noise Action Plans in which they define mitigation actions to address noise issues as identified through the noise mapping process. **The European Commission has recently evaluated the state of implementation of this Directive and concluded on several issues, in particular significant delays in the preparation of noise maps as well as action plans. There are also considerations to possibly enhance the stringency of the Directive by introducing noise limits or targets. ACI EUROPE is not in favour of such a "one-size-fits-all" initiative, because it would significantly limit the flexibility of Member States to address noise depending on the local circumstances and community preferences around the airports.**

This principle of a local, airport-by-airport approach to noise management is also underlying the so-called Balanced Approach defined by ICAO. It prescribes that based on the individual noise situation at each airport, the following mitigation options should be explored before introducing any operating restrictions: noise reductions at source (e.g. at the level of the aircraft), land-use planning rules preventing population encroachment and the construction of noise-sensitive buildings around the airport and noise abatement operational procedures (e.g. preferential runways or routes). These principles have been fully incorporated into EU legislation through Regulation 598/2014, which entered into force in June 2016. ACI EUROPE is working closely with the European Commission to support the implementation of this Regulation.

To successfully address noise issues at an airport, proactive engagement with the communities concerned is key. To support this process in relation to such a technical and complex topic, ACI EUROPE has prepared a dedicated Information Paper on Aviation Noise Indicators.

12. See https://www.eea.europa.eu/themes/human/noise/sub-sections/noise-in-europe-updated-population-exposure

Climate change

At the global level, greenhouse gas emissions are the main environmental impact of aviation. Even though it is estimated that airport activities account for about 2-5% of the global aviation emissions, airports are increasingly coming into the spotlight as far as their actions to address emissions are concerned. Consequently, the potential impact of airport capacity extensions on aviation emissions is increasingly under scrutiny, as shown by the discussion on new runways in the UK and Austria.

Within this context, ACI's voluntary carbon management programme, *Airport Carbon Accreditation*[13], helps airport define, implement and communicate about relevant emission reductions' actions. This initiative is widely recognised by authoritative institutions in the area of climate change and aviation, in particular the United Nations Framework Convention on Climate Change (UNFCCC) and ICAO.

At the EU level, there is no dedicated legislation addressing emissions under the direct control of the airport operator. However, airport activities are covered by the EU Effort Sharing Decision allocating emission reduction targets to Member States. They apply to industries not covered by the EU Emissions Trading System (ETS), including airports. It is at the discretion of Member States to translate these objectives into dedicated targets for specific sectors. Currently, specific targets for some major airports have been introduced in France. It should also be noted that airports operating combustion installations with a thermal rated input of above 20 MW are subject to the EU ETS for stationary installations.

Climate change is not only a challenge in relation to mitigation, but is also increasingly relevant for airports as far as adaptation is concerned. ACI EUROPE encourages airport operators to assess the possible impacts of a changing climate on their infrastructure and operations and subsequently identify mitigation actions. To support this process, EUROCONTROL has prepared a dedicated factsheet with the contribution of ACI EUROPE[14].

Local Air Quality

Local air quality is an increasing concern for communities around airports. There is currently no airport-specific regulation at EU level in this area. However, of direct relevance to some airports is the Directive 2015/2193 on the limitation of emissions of certain pollutants into the air from medium combustion plants. It entails the obligation for operators of combustion plants with rated thermal input between 1 and 20 MW to respect emission limits for certain air pollutants.

13. To find out more about the programme, please visit www.airportCO2.org
14. http://www.eurocontrol.int/sites/default/files/content/documents/official-documents/factsheets/aviation-climate-resilience-factsheet-2014.pdf

Collaborative Environmental Management

Regardless of the environmental impact considered, it is key that in addressing it, the airport operator tries to cooperate as much as possible with other stakeholders involved in airport activities, such as airlines or air navigation service providers. **To support this process, EUROCONTROL has developed a specification for Collaborative Environmental Management (CEM), which has also been adopted by ACI EUROPE as a recommended practice. It provides a step-by-step guidance for airport operators wishing to establish collaborative arrangements with their partners[15].**

Keflavík Airport / KEF

15. https://www.aci-europe.org/component/downloads/downloads/4059.html

4

Madeira Airport / FNC

THE ACI EUROPE'S REGIONAL AIRPORTS' FORUM

Cagliari Airport / CAG

Split Airport / SPU

ACI EUROPE's REGIONAL AIRPORTS' FORUM

The ACI EUROPE *Regional Airports' Forum* is intended to provide a platform for regional airports to exchange knowledge, share best practice and discuss issues of common interest. It is also intended to allow ACI EUROPE to get an in-depth knowledge of the issues and interests specific to regional airports, so as to allow a better representation of such interests when interacting with the EU institutions. Conversely, the Forum should also allow regional airports to get information about EU affairs and access the EU institutions.

The Forum holds two meetings per year, one of which always precedes the ACI EUROPE Regional Airports' Conference & Exhibition. It also assists in creating the programme for this annual Conference.

The *Regional Airports' Forum* is open to all ACI EUROPE Regular Members managing regional airports, National Airport Associations and ACI EUROPE's World Business Partners.

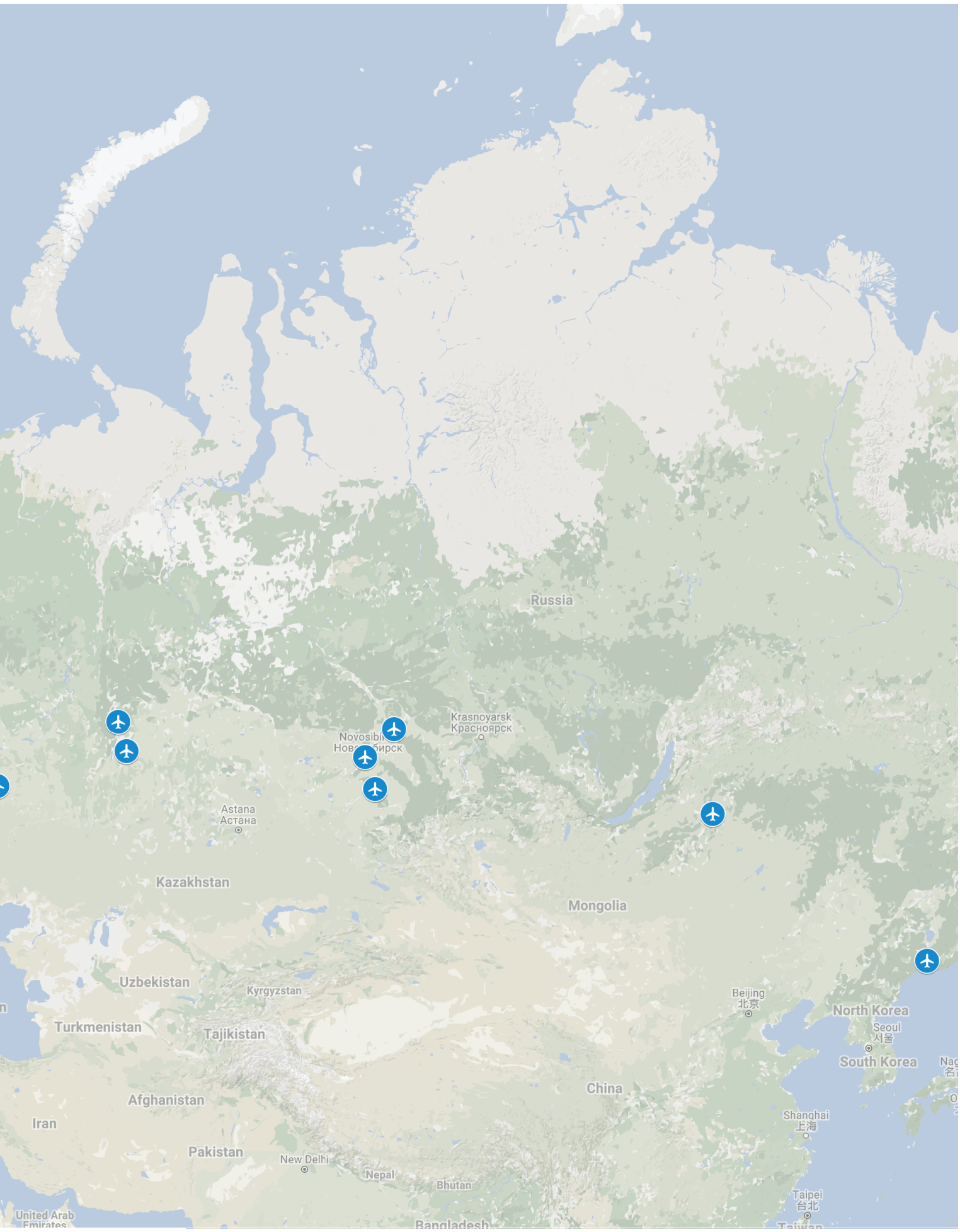
ACI EUROPE Regional Airports' Conference & Exhibition: **Cork** (2017), **Vilnius** (2016) and **Reykjavik** (2015)

ACI EUROPE Regional Airports' Conference & Exhibition: **Madeira** (2014), **Lyon** (2013) and **Ljubljana** (2012)

Malta Airport / MLA

ANNEXES

MAP OF ACI EUROPE'S REGIONAL AIRPORTS' FORUM MEMBERS


Russia
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Красноярск
Astana
Астана
Kazakhstan
Mongolia
Uzbekistan
Kyrgyzstan
Turkmenistan
Tajikistan
Afghanistan
Iran
Pakistan
New Delhi
Nepal
Bhutan
China
Beijing
北京
North Korea
Seoul
서울
South Korea
Shanghai
上海
Taipei
台北
United Arab Emirates

LIST OF ACI EUROPE'S REGIONAL AIRPORTS' FORUM MEMBERS

Countries	Airports	Code	Operators
ALBANIA	**Tirana**	TIA	Tirana Airport
AUSTRIA	**Graz**	GRZ	Graz Flughafen
	Innsbruck	INN	Innsbruck Flughafen
	Klagenfurt	KLU	Kärntner Flughafen
	Linz	LNZ	Flughafen Linz
	Salzburg	SZG	Salzburger Flughafen
BELARUS	**Minsk**	MSQ	Minsk National Airport
BELGIUM	**Antwerp**	ANR	LEM Antwerpen
	Charleroi	CRL	BSCA
	Liège	LGG	Liège Airport
	Ostend	OST	LEM Oostende-Brugge
BOSNIA-HERZ.	**Mostar**	OMO	Aerodrom Mostar
	Sarajevo	SJJ	Sarajevo Airport
BULGARIA	**Bourgas**	BOJ	Fraport Twin Star
	Plovdiv	PDV	Plovdiv Airport
	Varna	VAR	Fraport Twin Star
CROATIA	**Dubrovnik**	DBV	Dubrovnik Airport
	Osijek	OSI	Osijek Airport
	Pula	PUY	Pula Airport
	Rijeka	RJK	Rijeka Airport
	Split	SPU	Split Airport
	Supetar	BWK	Brac Airport
	Zadar	ZAD	Zadar Airport
	Zagreb	ZAG	Zagreb Airport
CYPRUS	**Larnaka**	LCA	Hermes Airports
	Pafos	PFO	Hermes Airports
CZECH REP	**Brno**	BRQ	Airport Brno
	Karlovy Vary	KLV	Karlovy Vary Airport
	Ostrava	OSR	Letiště Ostrava
	Pardubice	PED	East Bohemian Airport
	Prague	PRG	Letiště Praha

DENMARK	**Billund**	BLL	Billund Lufthavn
	Roskilde	RKE	Københavns Lufthavne
ESTONIA	**Tallinn**	TLL	Tallinn Airport
FINLAND	**Enontekiö**	ENF	FINAVIA
	Halli	KEV	FINAVIA
	Ivalo	IVL	FINAVIA
	Joensuu	JOE	FINAVIA
	Kajaani	KAJ	FINAVIA
	Kemi-Tornio	KEM	FINAVIA
	Kittilä	KTT	FINAVIA
	Kronoby Kruunupyy	KOK	FINAVIA
	Kuopio	KUO	FINAVIA
	Kuusamo	KAO	FINAVIA
	Maarianhamina	MHQ	FINAVIA
	Oulunsalo Oulu	OUL	FINAVIA
	Pori	POR	FINAVIA
	Rovaniemi	RVN	FINAVIA
	Savonlinna	SVL	FINAVIA
	Tampere-Pirkkala	TMP	FINAVIA
	Tikkakoski Jyväskylä	JYV	FINAVIA
	Turku	TKU	FINAVIA
	Utti	UTI	FINAVIA
	Vaasa	VAA	FINAVIA
FRANCE	**Ajaccio**	AJA	CCI Ajaccio & Corse-du-Sud
	Albert Picardie	BYF	Keolis Airport
	Ancenis	LFFI	VINCI Airports
	Angers Loire	ANE	Keolis Airport
	Angoulême	ANG	Edeis
	Annecy	NCY	Edeis
	Auxerre	AUF	Edeis
	Avignon	AVN	CCI d'Avignon & Vaucluse
	Bastia Poretta	BIA	CCI Bastia & Haute Corse
	Biarritz	BIQ	Aérodrome Biarritz Anglet Bayonne
	Bordeaux	BOD	Aéroport de Bordeaux Mérignac
	Bourges	BOU	Edeis

	Brest	BES	Aéroports de Brest Bretagne
	Caen	CFR	Aéroport Caen-Normandie
	Calvi Ste-Catherine	CLY	CCI Bastia & Haute Corse
	Cannes-Mandelieu	CEQ	Aéroports de la Côte d'Azur
	Chalon	XCD	Edeis
	Chambéry	CMF	VINCI Airports
	Châteauroux	CHR	Aéroport Châteauroux-Centre
	Cherbourg	CER	Edeis
	Clermont-Ferrand	CFE	VINCI Airports
	Dijon	DIJ	Edeis
	Dinard	DNR	VINCI Airports
	Dole Jura	DLE	Keolis Airport
	Grenoble Alpes Isère	GNB	VINCI Airports
	La Rochelle – Ile de Ré	LRH	CCI de La Rochelle
	Le Havre	LEH	Edeis
	Lille-Lesquin	LIL	SOGAREL
	Limoges	LIG	CCI de Limoges
	Lyon-Bron	LYN	Aéroports de Lyon
	Lyon-Saint Exupéry	LYS	Aéroports de Lyon
	Marseille Provence	MRS	CCI de Marseille Provence
	Nantes-Atlantique	NTE	VINCI Airports
	Nice Côte d'Azur	NCE	Aéroports de la Côte d'Azur
	Nîmes Alès Camargue Cévennes	FNI	Edeis
	Paris-Le Bourget	LBG	Groupe ADP
	Pau-Pyrénées	PUF	CCI de Pau
	Perpignan-Rivesaltes	PGF	Transdev
	Poitiers-Biard	PIS	VINCI Airports
	Quimper-Cornouaille	UIP	Aéroport de Cornouaille
	Reims	RHE	Edeis
	Rennes	RNS	VINCI Airports
	Rouen	URO	Edeis
	Saint-Nazaire	SNR	VINCI Airports
	Saint-Tropez	LTT	Aéroports de la Côte d'Azur
	Strasbourg	SXB	Aéroport de Strasbourg-Entzheim
	Tarbes	LDE	Edeis

	Toulon-Hyères	TLN	VINCI Airports
	Toulouse-Blagnac	TLS	SA Toulouse-Blagnac
	Toulouse Francazal	LFBF	Edeis
	Tours	TUF	Edeis
	Troyes	QYR	Edeis
	Vannes	VNE	Edeis
	Vosges Epinal	EPL	Keolis Airport
FYROM	**Ohrid**	OHD	TAV Airports
	Skopje	SKP	TAV Airports
GEORGIA	**Batumi**	BUS	TAV Airports
	Kutaisi	KUT	United Airports Georgia
	Tbilisi	TBS	TAV Airports
GERMANY	**Bremen**	BRE	Flughafen Bremen
	Düsseldorf	DUS	Flughafen Düsseldorf
	Friedrichshafen	FDH	Flughafen Friedrichshafen
	Hamburg	HAM	Flughafen Hamburg
	Hannover	HAJ	Flughafen Hannover-Langenhagen
	Kassel	KSF	Flughafen Kassel
	Köln/Bonn	CGN	Flughafen Köln/Bonn
	Memmingen	FMM	Allgaü Airport
	Münster	FMO	Flughafen Münster/Osnabrück
	Nürnberg	NUE	Flughafen Nürnberg
	Stuttgart	STR	Flughafen Stuttgart
GREECE	**Agrinio**	AGQ	HCAA
	Aktio (Preveza)	PVK	Fraport Greece
	Alexandroupolis	AXD	HCAA
	Andravida	PYR	HCAA
	Araxos	GPA	HCAA
	Astypalea	JTY	HCAA
	Chania	CHQ	Fraport Greece
	Chios	JKH	HCAA
	Epitalio	LGEP	HCAA
	Heraklion	HER	HCAA
	Ikaria	JIK	HCAA
	Ioannina	IOA	HCAA
	Kalamata	KLX	HCAA

	Kalymnos	JKL	HCAA
	Karpathos	AOK	HCAA
	Kasos	KSJ	HCAA
	Kasteli	LGTL	HCAA
	Kastellorizo	KZS	HCAA
	Kastoria	KSO	HCAA
	Kavala	KVA	Fraport Greece
	Kefallinia	EFL	Fraport Greece
	Kerkyra (Corfu)	CFU	Fraport Greece
	Kos	KGS	Fraport Greece
	Kozani	KZI	HCAA
	Kythira	KIT	HCAA
	Leros	LRS	Fraport Greece
	Limnos	LXS	HCAA
	Milos	MLO	HCAA
	Mykonos	JMK	Fraport Greece
	Mytilini	MJT	HCAA
	Naxos	JNX	HCAA
	Nea Anchialos (Volos)	VOL	HCAA
	Paros	PAS	HCAA
	Rodos	RHO	Fraport Greece
	Samos	SMI	Fraport Greece
	Santorini (Thira)	JTR	Fraport Greece
	Sitia	JSH	HCAA
	Skiathos	JSI	Fraport Greece
	Skyros	SKU	HCAA
	Sparti	SPJ	HCAA
	Syros	JSY	HCAA
	Thessaloniki	SKG	Fraport Greece
	Zakynthos	ZTH	Fraport Greece
ICELAND	**Keflavik**	KEF	Isavia
IRELAND	**Cork**	ORK	daa
	Kerry	KIR	Kerry Airport
	Knock	NOC	Ireland West Airport Knock
	Shannon	SNN	Shannon Group

ISRAEL	**Eilat**	ETH	Israel Airports Authority
	Haifa	HFA	Israel Airports Authority
	Herzlia	HRZ	Israel Airports Authority
	Ovda	VDA	Israel Airports Authority
	Rosh Pina	RPN	Israel Airports Authority
	Tel Aviv Sde-Dov Hoz	SDV	Israel Airports Authority
ITALY	**Bari**	BRI	Aeroporti di Puglia
	Bergamo	BGY	SACBO
	Bologna	BLQ	Aeroporto di Bologna
	Brescia	VBS	Aeroporto di Verona Villafranca
	Brindisi	BDS	Aeroporti di Puglia
	Cagliari	CAG	SOGAER
	Firenze	FLR	Toscana Aeroporti
	Foggia	FOG	Aeroporti di Puglia
	Genova	GOA	Aeroporto di Genova
	Naples	NAP	GESAC
	Olbia	OLB	GEASAR
	Palermo	PMO	GESAP
	Parma	PMF	SOGEAP
	Taranto	TAR	Aeroporti di Puglia
	Trapani Birgi	TPS	Airgest
	Treviso	TSF	SAVE
	Trieste	TRS	Aeroporto Friuli Venezia Giulia
	Turin	TRN	SAGAT
	Venezia	VCE	SAVE
	Verona	VRN	Aeroporto di Verona Villafranca
KOSOVO	**Pristina**	PRN	Limak Kosovo
LATVIA	**Riga**	RIX	Riga Airport
LITHUANIA	**Kaunas**	KUN	Lithuanian Airports
	Palanga	PLQ	Lithuanian Airports
	Vilnius	VNO	Lithuanian Airports
LUXEMBOURG	**Luxembourg**	LUX	Aéroport de Luxembourg
MALTA	**Malta**	MLA	Malta Airport
MOLDOVA	**Chisinau**	KIV	Chisinau Airport

MONACO	**Monaco**	MCM	Service de l'Aviation Civile
MONTENEGRO	**Podgorica**	TGD	Airports of Montenegro
	Tivat	TIV	Airports of Montenegro
NETHERLANDS	**Eindhoven**	EIN	Eindhoven Airport
	Groningen	GRQ	Groningen Airport Eelde
	Rotterdam	RTM	Rotterdam The Hague Airport
NORWAY	**Alesund, Vigra**	AES	AVINOR
	Alta	ALF	AVINOR
	Andøya, Andenes	ANX	AVINOR
	Bardufoss	BDU	AVINOR
	Båtsfjord	BJF	AVINOR
	Bergen, Flesland	BGO	AVINOR
	Berlevåg	BVG	AVINOR
	Bodø	BOO	AVINOR
	Brønnøysund, Brønnøy	BNN	AVINOR
	Fagernes, Leirin	VDB	AVINOR
	Florø	FRO	AVINOR
	Førde, Bringeland	FDE	AVINOR
	Hammerfest	HFT	AVINOR
	Harstad/Narvik, Evenes	EVE	AVINOR
	Hasvik	HAA	AVINOR
	Haugesund, Karmøy	HAU	AVINOR
	Honningsvåg, Valan	HVG	AVINOR
	Kirkenes, Høybuktmoen	KKN	AVINOR
	Kristiansand, Kjevik	KRS	AVINOR
	Kristiansund, Kvernberget	KSU	AVINOR
	Lakselv, Banak	LKL	AVINOR
	Leknes	LKN	AVINOR
	Mehamn	MEH	AVINOR
	Mo i Rana, Røssvoll	MQN	AVINOR
	Molde, Årø	MOL	AVINOR
	Mosjøen, Kjærstad	MJF	AVINOR
	Namsos	OSY	AVINOR
	Narvik, Frammes	NVK	AVINOR

	Ørsta-Volda, Hovden	HOV	AVINOR
	Røros	RRS	AVINOR
	Rørvik, Ryum	RVK	AVINOR
	Røst	RET	AVINOR
	Sandane, Anda	SDN	AVINOR
	Sandnessjøen, Stokka	SSJ	AVINOR
	Sogndal, Haukåsen	SOG	AVINOR
	Sørkjosen	SOJ	AVINOR
	Stavanger, Sola	SVG	AVINOR
	Stokmarknes, Skagen	SKN	AVINOR
	Svalbard, Longyearbyen	LYR	AVINOR
	Svolvær, Helle	SVJ	AVINOR
	Tromsø, Langnes	TOS	AVINOR
	Trondheim, Værnes	TRD	AVINOR
	Vadsø	VDS	AVINOR
	Værøy Heliport	VRY	AVINOR
	Vardø, Svartnes	VAW	AVINOR
POLAND	**Katowice**	KTW	Upper Silesian Aviation Group
	Krakow	KRK	Airport Krakow – Balice
	Lodz	LCJ	Airport Lodz
	Lublin	LUZ	Port Lotniczy Lublin
	Poznan	POZ	Poznan Lawica Airport
	Wroclaw	WRO	Wroclaw Airport Co
PORTUGAL	**Beja**	BYJ	Aeroportos de Portugal
	Faro	FAO	Aeroportos de Portugal
	Flores (Azores)	FLW	Aeroportos de Portugal
	Horta (Azores)	HOR	Aeroportos de Portugal
	Madeira	FCN	Aeroportos de Portugal
	Oporto	OPO	Aeroportos de Portugal
	Ponta Delgada (Azores)	PDL	Aeroportos de Portugal
	Porto Santo	PXO	Aeroportos de Portugal
	Santa Maria (Azores)	SMA	Aeroportos de Portugal
ROMANIA	**Arad**	ARW	Arad International Airport
	Bacau	BCM	Aeroportul Bacau
	Baia Mare	BAY	Baia Mare Airport

	Bucharest Baneasa	BBU	Aeroporturi Bucuresti
	Cluj	CLJ	Aeroportul Cluj Napoca
	Constanta	CND	Aeroportul Constanta
	Craiova	CRA	Aeroportul Craiova
	Iasi	IAS	Aeroport Iasi
	Oradea	OMR	Aeroportul Oradea
	Satu Mare	SUJ	Aeroportul Satu Mare
	Sibiu	SBZ	Aeroportul Sibiu
	Timisoara	TSR	Aeroportul Timişoara
	Tulcea	TCE	Aeroportul Tulcea
	Vidrasau - Mures	TGM	Aeroportul Transilvania Târgu Mureş
RUSSIA	**Astrakhan**	ASF	Novaport
	Barnaul	BAX	Novaport
	Chelyabinsk	CEK	Novaport
	Chita	HTA	Novaport
	Ekaterinburg Koltsovo	SVX	Airports of the Regions
	Kaliningrad	KGD	Aeroinvest
	Kaluga	KLF	Kaluga Airport
	Kazan	KZN	Kazan Airport
	Mineralnye Vody	MRV	Aeroinvest
	Nalchik	NAL	Aeroinvest
	Novosibirsk	OVB	Novaport
	Rostov on Don	ROV	Airports of the Regions
	Samara Kurumoch	KUF	Airports of the Regions
	Sochi	AER	Sochi Airport
	St-Petersburg	LED	Pulkovo Airport
	Strigino Nizhniy Novgorod	GOJ	Airports of the Regions
	Tomsk	TOF	Novaport
	Vladivostok	VVO	Vladivostok Airport
	Volgograd	VOG	Novaport
SERBIA	**Belgrade**	BEG	Airport Belgrade
	Nis	INI	Airport Nis
SLOVAKIA	**Bratislava**	BTS	Airport Bratislava
SLOVENIA	**Ljubljana**	LJU	Fraport Slovenija
	Maribor	MBX	Airport Maribor

SPAIN	**A Coruña**	LCG	AENA
	Albacete	ABC	AENA
	Alicante-Elche	ALC	AENA
	Almeria	LEI	AENA
	Asturias	OVD	AENA
	Badajoz	BJZ	AENA
	Bilbao	BIO	AENA
	Burgos	RGS	AENA
	Castellón	CDT	Edeis
	Cordoba	ODB	AENA
	El Hierro	VDE	AENA
	Fuerteventura	FUE	AENA
	Girona-Costa Brava	GRO	AENA
	Gran Canaria	LPA	AENA
	Granada-Jaén F.G.L.	GRX	AENA
	Huesca-Pirineos	HSK	AENA
	Ibiza	IBZ	AENA
	Jerez	XRY	AENA
	La Gomera	GMZ	AENA
	La Palma	SPC	AENA
	Lanzarote	ACE	AENA
	Léon	LEN	AENA
	Lleida	ILD	Aeroports de Catalunya
	Logroño-Agoncillo	RJL	AENA
	Malaga-Costa del Sol	AGP	AENA
	Melilla	MLN	AENA
	Menorca	MAH	AENA
	Murcia-San Javier	MJV	AENA
	Palma de Mallorca	PMI	AENA
	Pamplona	PNA	AENA
	Reus	REU	AENA
	Sabadell	QSA	AENA
	Salamanca	SLM	AENA
	San Sebastian	EAS	AENA
	Santander	SDR	AENA

	Santiago	SCQ	AENA
	Sevilla	SVQ	AENA
	Son Bonet	LESB	AENA
	Tenerife Norte	TFN	AENA
	Tenerife Sur	TFS	AENA
	Valencia	VLC	AENA
	Valladolid	VLL	AENA
	Vigo	VGO	AENA
	Vitoria	VIT	AENA
	Zaragoza	ZAZ	AENA
SWEDEN	**Ängelholm-Helsingborg**	AGH	Swedish Regional Airports
	Åre Östersund	OSD	Swedavia
	Arvidsjaur	AJR	Swedish Regional Airports
	Borlänge-Falun	BLE	Swedish Regional Airports
	Eskilstuna	EKT	Swedish Regional Airports
	Falköping	ESGK	Swedish Regional Airports
	Gällivare	GEV	Swedish Regional Airports
	Göteborg Landvetter	GOT	Swedavia
	Hagfors	HFS	Swedish Regional Airports
	Halmstad	HAD	Swedish Regional Airports
	Hemavan	HMV	Swedish Regional Airports
	Höga Kusten	KRF	Swedish Regional Airports
	Jönköping	JKG	Swedish Regional Airports
	Kalmar	KLR	Swedish Regional Airports
	Karlstad	KSD	Swedish Regional Airports
	Kiruna	KRN	Swedavia
	Kristianstad	KID	Swedish Regional Airports
	Linköping	LPI	Swedish Regional Airports
	Ljungbyhed	ESTL	Swedish Regional Airports
	Luleå	LLA	Swedavia
	Lycksele	LYC	Swedish Regional Airports
	Malmö	MMX	Swedavia
	Mora-Siljan	MXX	Swedish Regional Airports
	Norrköping	NRK	Swedish Regional Airports
	Örebro	ORB	Swedish Regional Airports

	Örnskoldsvik	OER	Swedish Regional Airports
	Pajala	PJA	Swedish Regional Airports
	Ronneby	RNB	Swedavia
	Sälen	-	Swedish Regional Airports
	Skellefteå	SFT	Swedish Regional Airports
	Skövde	KVB	Swedish Regional Airports
	Storuman	SQO	Swedish Regional Airports
	Sundsvall-Timrå	SDL	Swedish Regional Airports
	Sveg	EVG	Swedish Regional Airports
	Torsby	TYF	Swedish Regional Airports
	Trollhattan-Vanersborg	THN	Swedish Regional Airports
	Umeå	UME	Swedavia
	Vaxjö	VXO	Swedish Regional Airports
	Vilhelmina	VHM	Swedish Regional Airports
	Visby	VBY	Swedavia
SWITZERLAND	**Basel-Mulhouse-Freibourg**	BSL	EuroAirport
	Bern	BRN	Flughafen Bern
	Genève	GVA	Aéroport de Genève
	Sion	SIR	Aéroport de Sion
TURKEY	**Adana**	ADA	DHMI
	Adiyaman	ADF	DHMI
	Ağri	AJI	DHMI
	Alanya - Antalya Gazipasa	GZP	TAV Airports
	Amasya Merzifon	MZH	DHMI
	Ankara Esenboğa	ESB	TAV Airports
	Antalya	AYT	Fraport IC İçtaş Antalya
	Balikesir	BZI	DHMI
	Balikesir Koca Seyit	EDO	DHMI
	Batman	BAL	DHMI
	Bingol	BGG	DHMI
	Bursa Yenişehir	YEI	DHMI
	Çanakkale	CKZ	DHMI
	Çanakkale Gökçeada	GKD	DHMI
	Denizli Çardak	DNZ	DHMI
	Diyarbakir	DIY	DHMI

	Elaziğ	EZS	DHMI
	Erzincan	ERC	DHMI
	Erzurum	ERZ	DHMI
	Gaziantep	GZT	DHMI
	Hakkari Yüksekova	YKO	DHMI
	Hatay	HTY	DHMI
	Iğdir	IGD	DHMI
	Isparta Süleyman Demirel	ISE	DHMI
	Istanbul Sabiha Gökçen	SAW	ISGIA
	İzmir Adnan Menderes	ADB	TAV Airports
	Kahramanmaraş	KCM	DHMI
	Kars Airport	KSY	DHMI
	Kastamonu	KFS	DHMI
	Kayseri	ASR	DHMI
	Kocaeli Cengiz Topel	KCO	DHMI
	Konya	KYA	DHMI
	Malatya	MLX	DHMI
	Mardin	MQM	DHMI
	Muğla Milas - Bodrum	BJV	TAV Airports
	Muş	MSR	DHMI
	Nevşehir Kapadokya	NAV	DHMI
	Samsun Çarşamba	SZF	DHMI
	Şanliurfa Gap	GNY	DHMI
	Siirt Airport	SXZ	DHMI
	Sinop Airport	NOP	DHMI
	Sirnak	NKT	DHMI
	Sivas Nuri Demirağ	VAS	DHMI
	Tekirdağ Çorlu	TEQ	DHMI
	Tokat Airport	TJK	DHMI
	Trabzon Airport	TZX	DHMI
	Uşak Airport	USQ	DHMI
	Van Ferit Melen	VAN	DHMI
UKRAINE	**Kharkiv**	HRK	New Systems AM
	Odessa	ODS	Odessa Airport

UK	**Aberdeen**	ABZ	Aberdeen Airport
	Birmingham	BHX	Birmingham Airport
	Bournemouth	BOH	MAG
	Bristol	BRS	Bristol Airport
	Channel Islands	JER	Jersey Airport
	East Midlands	EMA	MAG
	Edinburgh	EDI	Edinburgh Airport
	Farnborough	FAB	TAG Farnborough Airport
	Gibraltar	GIB	Gibraltar Airport
	Glasgow	GLA	Glasgow Airport
	Inverness	INV	Highlands & Islands Airports
	Isle of Man	IOM	Isle of Man Airport
	Liverpool	LPL	Liverpool Airport
	Manchester	MAN	MAG
	Newcastle	NCL	Newcastle Airport
	Newquay	NQY	Newquay Airport
	Southampton	SOU	Southampton Airport

44 **Countries**	466 **Airports**	166 **Operators**

WORLD BUSINESS PARTNERS

1	Adecs Airinfra B.V.
2	AI-MS Aviation Infrastructure Management Systems GmbH
3	Arinc Emea
4	Arup
5	Chauntry Corporation Ltd.
6	Dufry
7	Everbridge
8	GroupEAD Europe S.L.
9	IC Aviation
10	JTI Trading S.A.
11	Krankikom Gmbh
12	Longest chance limited
13	Mott MacDonald Ltd
14	Planport GmbH
15	Rezcomm
16	Sasse Aviation Service
17	SITA
18	Skywise Solutions Ltd.
19	TH Airport Consulting
20	Unisys A/S

NATIONAL AIRPORTS ASSOCIATIONS

FRANCE	**LES AEROPORTS FRANCOPHONES Associés à l'ACI**
	UAF – Union des Aéroports Français
GERMANY	**ADV – Arbeitsgemeinschaft Deutscher Verkehrsflughäfen**
ITALY	**Assaeroporti – Italian Airports Association**
ROMANIA	**Romanian Airports Association**
RUSSIA	**FSUE "Administration of Civil Airports (aerodromes)"**
SWITZERLAND	**Swiss Airports Association**
UK	**AOA – Airport Operators' Association**
UKRAINE	**Association "Airports of Ukraine" of Civil Aviation**

AIRPORTS COUNCIL INTERNATIONAL

ACI EUROPE's REGIONAL AIRPORTS' FORUM

ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents **over 500 airports** in 45 European countries. Our members facilitate over 90% of commercial air traffic in Europe: **2 billion passengers, 20 million tonnes of freight** and **23.7 million aircraft movements** in 2016. These airports contribute to the employment of **12.3 million people**, generating **€675 billion** each year **(4.1%) of GDP** in Europe.

EVERY FLIGHT BEGINS AT THE AIRPORT.

For more information contact:
Federico Bonaudi
Manager: Facilitation, Parliamentary Affairs & Regional Airports
Tel. +32 2 552 09 76 | Fax. +32 2 502 56 37
federico.bonaudi@aci-europe.org

www.aci-europe.org
Twitter: @ACI_EUROPE

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