

## WELCOME

Participants were welcomed to the STRAIR conference by politician, *Andres Käärrik, 1<sup>st</sup> vice chairman, Board of Regional Planning and Urban Transportation, Stockholm County Council*, who provided them with information about the Swedish political system. He explained how municipalities and regions are responsible for public transport and healthcare and receive no national government support.

“Whatever we want to do locally also has to be financed on a local level and used efficiently to provide value to our citizens. Fifty years ago the regional planning office was started to coordinate the planning work. For our region, it is very important that we have a first class, international airport.”

He stated that the airport could be seen as a strategic means to increase local development and planning. International and local cooperation is important in these plans.

“People in the region need to understand the importance of the airport and possible airport expansion. Many communities are wary of these expansion plans and have a N.I.M.B. (not in my backyard) attitude. We can change this opinion. We have to communicate the importance of having these facilities and the value they bring to local residents and the area.”

Andres Käärrik concluded by saying that a bold and ambitious vision will be established for Stockholm: Stockholm is to become the most attractive urban region in Europe.

Anne Devitt, President of ARC, also welcomed conference participants and thanked Stockholm for hosting the event. She said that ARC was very pleased to be involved in the event.

“Airports are the economic engines that drive the economic development of the regions,” she said.

She also stated that the quality of life for communities around the airports is extremely important.

“The work all of you are doing is useful to the EU, your own regions, and everyone involved in aviation,” she concluded.

After the welcome, *Hans Brattström, Office of Regional Planning and Urban Transportation in Stockholm*, made an introduction regarding the framework of the STRAIR project.

The STRAIR (Strategic Development and Cooperation between Airport Regions) partnership consists of Norway (Oslo/Gardermoen), Spain (Barcelona – El Prat and Viladecans), Spain (Canary Islands), Scotland (Glasgow – Renfrewshire Council), Belgium (Ostende - WVI), Sweden (Härreda/Landvetter) and Sweden (Stockholm Arlanda Partnership).

Closeness to international airports and advanced infrastructure are strong sales and marketing issues for regions to attract investments and knowledge workers. The essence of STRAIR is to utilize the fact that well-functioning airports are drivers for regional business development. STRAIR partners are made up of the fastest growing and most accessible regions of their country, the latter because of the advanced infrastructure linked to the airport, and the partners are regions of the national/capitol airport or main airport. The starting point of the STRAIR project is to enhance the common knowledge of developments in other airport regions as well as understanding the importance of having an international approach for business development.

“The overall objective of STRAIR is to improve innovation systems for industrial and business development in airport regions and to develop airport region networks with the intention of learning from each others operations.”

The project was divided into different components including innovation and business development directly related to airports, innovation and business development indirectly related to airports, territorial and environmental effects of airport development and distribution and cooperation with airport networks. Through this project, the partners have delivered a number of reports, which will be useful for all partners.

Hans Brattström stated that airports can have important localization effects and that the STRAIR project can contribute to joint interest between the airport authority and public and private players to enable airports to have positive growth. Airports are driving forces for economic development. To enhance that, we need to know how this works.

“Some of the main questions that we had to ask in this project were how does business development look in the airport region and what can public players do to support this development? We needed to know if there is a development strategy at the airport and who the main players are and why they’re involved. We also needed to know the role the airport operator plays in this development as well as what strengths and weaknesses the airport has in regard to attracting business.”

In conclusion Hans Brattström stated, “Better coordination is needed to create even more success. The airport is an important economic asset and we have to make sure that the airport is viewed in this way rather than as an environmental issue and more work needs to be done in order to fully define the problems within the thematic areas. ”

Hans Brattström then introduced presentations from the STRAIR project partners, which were moderated by *Mrs. Susanne Ingo of WSP*.

“We have an interesting and exciting day ahead of us, but it will also be a very intensive day,” said Mrs. Ingo, who then introduced partners from the 8 regions.

The participants were:

Carmen Sosa- Proexca, Santa Cruz De Tenerife  
Raquel Millian- Viladecans City Council  
Patrick Zutterman- West-Vlaamse Intercommunale, Ostende  
Maria Wall Petrini- LFV Stockholm Arlanda Airport, Stockholm  
Lotta Kjällström- Härryda Municipality  
James Cunningham- Renfrewshire Council  
Svein Hoelsaeter- Oslo Airport Region  
Belen Delgado- El Prat Municipality

Each partner was asked three questions:

**1. What is the direction/content/focus of your part of the project?**

**Carmen Sosa:** There was a strong focus on air service development, air carriers, new routes and frequencies and passenger traffic, especially for tourist destinations.

**Svein Hoelsaeter:** To point out the indirect economic impacts related to the Oslo/Gardermoen Airport’s role as a hub in the Norwegian transport and logistic system.

**Maria Wall Petrini:** The focus was cooperation with municipalities and others to create a larger airport region.

**Belen Delgado:** We wanted to be involved in the project and to gain more knowledge about infrastructure.

**Raquel Millian:** To learn more about economic development in the region and municipality and to get professional profiles regarding demand.

**Patrick Zutterman:** We focused on economic development related to the airport and the airport-related business park.

**Lotta Kjällström:** The focus was on land use and the development of land around the airport (around 20 kilometers) and a concrete vision for business development in the area.

**James Cunningham:** The main focus was on economic development for aviation projects in the UK

## 2. Why did your organisation/municipality, etc., decide to participate in the project?

**Carmen Sosa:** To stimulate growth, especially within air service development and to see what fits with our overall aims.

**Svein Hoelsaeter:** Because the Oslo Airport Region wanted a closer look at the impact of infrastructure investments on regional development. This would give us the opportunity to involve national authorities such as Avinor, the Norwegian Rail Road Administration and Norwegian Public Road Administration in matters of local, regional and national concern.

**Lotta Kjällström:** We have 25 stakeholders/players and this project was of interest for all of Sweden.

**Belen Delgado:** To share knowledge with partners- we all have one thing in common- airports.

**Raquel Millian:** There were a wide range of cities involved and we thought all this experience would be useful to us.

**James Cunningham:** To promote economic development and to learn about attracting MROs (maintenance repair and overhaul). We thought we could benefit from the studies and by working collectively.

**Patrick Zutterman:** We were interested in the partners and in their objectives.

**Maria Wall Petrini:** We wanted to meet interested parties in the region and to exchange ideas and experiences.

## 3. What were your expectations when joining the project?

**Carmen Sosa:** The expectations were quite high but the main thing we wanted to learn about was air service development.

**Svein Hoelsaeter:** To get new knowledge about what impact new infrastructure could have on establishing transportation clusters. We also hoped to gain valuable knowledge from other parts of the STRAIR project.

**Maria Wall Petrini:** To learn more, to get more knowledge and experience. The reports that have been generated are useful to everyone.

**Raquel Millian:** We wanted to share knowledge and experiences.... and have fun!

STRAIR FINAL CONFERENCE- JUNE 14, 2007

**Patrick Zutterman:** We wanted to exchange our experiences and knowledge and also to gain experience and knowledge from others.

**Lotta Kjällström:** To get experience and learn. We have a young airport and there are many opportunities. We wanted to get input from others to create a new master plan to develop a strategy to exploit these opportunities.

**Belen Delgado:** We wanted to share experiences and studies.

**James Cunningham:** To expand our network and create employment incentives.

## Legal issues related to Air Service Development

Hugh O' Donovan, Quadrant Chambers UK.

“First of all I'd like to say how impressed I am that eight partners from different Member States have cooperated so closely and effectively to achieve a joint goal (and have been able to speak about this in perfect English!) I think that's a tremendous thing.”

Mr. O' Donovan explained is an English barrister (lawyer) specialising in air transport regulation internationally under English and European Community law, including competition law.. He stated that airports need to market themselves- more business equals more service and more tourism results in more business. He said that a great resource for going about this is the STRAIR publication “Air Service Development for Regional Development Agencies”.

“Airports need to offer incentives to attract airlines and other services. Also, airlines need to know where the markets are. Why should an airline alone do market research for your area? You, the airports, also have to do the market research. If you want to attract services, get more destinations and frequencies, you have to be prepared help the people who are investing in planes and pilots, etc., by offering discounts, and other incentives.”

But he also pointed out that there could be legal impediments when marketing your airport. Many airports are nationally owned, and according to EC law, if a member state favours an undertaking with state resources so that competition is distorted it is unlawful. This is referred to as unlawful “state aid” (Article 87 of the EC Treaty). Exceptions apply, but these must be approved by the European Commission. The Commission has issued Guidelines as to when it will normally approve such proposals, but these are not law. A proposal which falls outside the guidelines may still be approved but will have to be particularly carefully argued and justified (usually with appropriate legal advice).

“Certain incentives can be approved by the Commission in certain cases, but it should always be remembered that under the “market investor principle” , it may not be state aid at all (and therefore not require approval) if a private investor (eg a privately owned airport) would have granted the same incentives as proposed by you as a state owned airport, municipality, etc..”

STRAIR FINAL CONFERENCE- JUNE 14, 2007

He pointed out that approval (or relying on the market investor principle) is very dependent on having a business plan and showing the benefit that will accrue to the airport in the result. If the incentive plans are designed to provide a financial return to the airport and are realistically considered likely to do so the chances for approval are obviously better.

Hugh O' Donovan then emphasized the importance of airports being careful in what they promise airlines. He suggested referring to the Financial Incentives section in the Air Service Development publication for further information.

He concluded by saying: "Don't be a slave to the unlawful state aid rule. Be innovative and inventive. Create a strategy and check this against the state aid law. Justify the incentives and present them to the Commission even if they don't comply. If you have a good business plan and you can justify your incentives as you may still have an excellent chance of having your incentives approved, even if they fall outside the Guidelines."

## **Attracting aircraft Maintenance Repair and Overhaul (MRO) activities to International Airports- case Glasgow**

John Borkowski, MSP Solutions Limited

John Borkowski started by providing some forecast figures related to MRO solutions. He stated that the global fleet is expected to triple by the year 2035 and the European fleet will double during the same period. More than 50% of this will be with narrow-body planes. By 2025 the global fleet will total around 29,000 aircraft: 2,500 B747/A380s, 9,000 wide-body twins/trijets/A340s, and 17,500 narrow-body, single aisle aircraft. The forecast for maintenance opportunities is mixed. Total maintenance per flying hour is declining as more modern aircraft enter service. However, total flying is increasing and flying hours/aircraft are also increasing. Narrow-body aircraft demand more maintenance per flying hour due to much higher cycles (take-offs and landings). Wide-body maintenance will face intense competition from new MRO facilities in the Middle East and Asia.

"The best opportunities in Europe appear to be for narrow-body aircraft and an increasing amount of major engine and component maintenance is being done off-site."

MRO workloads are driven by flying hours and cycles, but new aircraft require less maintenance per flying hour and per operating cycle resulting in less maintenance per aircraft-year. Another characteristic is that manufacturers sometimes change specifications for this type of work. Airlines generally consider MRO as a percentage of total operating costs.

Mr. Borkowski then spoke about some of the critical factors to consider in attracting MRO providers.

“There are a number of barriers to entry. These include airport slots, land availability, capital availability, potential market, labour availability, security of tenure, track record and return on capital employed.”

He also stated that evaluating and managing capacity is an important factor. Capacity is provided on the basis of estimated loads and it is difficult to balance these loads over time (winter demand can be higher than summer). Also, costs are virtually fixed so facilities need to be used efficiently and intensively and a stable labour force is required. Today, airlines are looking for total fleet care packages instead of one-off overhauls.

He pointed out the importance of having a reputable MRO provider with a good track record that can attract or already has airline MRO business. Financing is important, as is the availability of skilled labour with a reputation for high quality work. A good geographical location is key. An airport providing MRO facilities can also benefit from government grants, launch aid or other regional incentives. He emphasized that for MRO companies leasing opportunities are more attractive than purchasing and that having the space to expand is another important factor.

“Attracting a good MRO provider requires persuasion and lobbying, personal conviction and commitment.”

## **The potential of the airport of Ostend and its business park to attract and develop economic activity- case Bruges airport business park**

Dr. Kris Debisschop, RebelGroup Advisory, Belgium

Dr. Debisschop began by providing an overview of the airport. Ostend handles around 100,000 tons of cargo per year. In 2005, within a radius of 500 km, the airport was ranked 14<sup>th</sup> in terms of inbound and outbound cargo. The business park is located on the apron of the airport and is owned by WVI. The airport is owned by the regional government.

“The aim of the study was to develop strategies for further development of the airport. Special attention was given to identifying the activities to be targeted as well as best practices and competition analysis.”

This included setting up an investment profile per activity including technical data, location drivers, identification of competitors and formulating a data point identification to measure the performance of each airport for each identified location driver. After this, each airport was scored and a cost-quality comparison between airports and positioning of the airport of Ostend was carried out.

“The activities needed to be airport-related considering the location of the business park and the lack of airport-related sites. The identified activities were, airlines, forwarders, trucking, and value-added logistics.”

STRAIR FINAL CONFERENCE- JUNE 14, 2007

Dr. Debisschop went on to explain that these activities were chosen for benchmarking purposes. Technical criteria included mobility, the operational necessity to locate on the airport grounds versus the possibility to locate near the airport, as well as labour and space requirements. Location driver criteria were made up of the operational climate, accessibility, market, infrastructure, flexibility and airside costs.

He presented the identified competitors and the reasons for selection. For each location driver, datapoints were selected to measure the performance of each of the airports. Each airport received a relative score for each location driver based on the datapoint information. This score was then multiplied by the category weight and the location driver weight.

“The strengths for Ostend airport were flexibility and a “personal touch”. There was no dominant player like TNT, which could attract niche players and there was limited congestion on the air and landside.”

Another important factor was “private” return versus “public” (social) return. This includes pricing for airlines, integrating government support at all levels, monitoring environmental permits, and attracting air cargo to the region by pro-actively working with other players in the air cargo transport chain.

“We also used active cluster management to cooperate within an integrated regional proposition where the airport and airport grounds are an attractive location factor to attract and further develop business.”

A concession policy was also formulated, which included attractive pricing and contract flexibility.

In summary, he stated that there needed to be a close link between the airport and business park. Also, competition for air cargo is strong and a pro-active market approach is necessary, especially if the local industry and market is relatively limited.

“It is important to target activities such as forwarders, import-export agents, airlines, cargo handlers, trucking companies, Value-added-logistics, smaller integrated logistics providers (no full-fledged integrators) and storage providers. It is also important to keep focusing on the “public return” rather than profits, and to be selective in attracting activities to the business park, even if it means that the grounds remain empty for a longer period of time.”

## **Economic development in the Airport hinterland- case Stockholm-Arlanda**

James Brass, York Aviation

James Brass began by stating the aim of the Stockholm STRAIR project.

“The aim of the project is to produce a joint action plan for business development in Stockholm Arlanda Airport’s hinterland in a cooperation

between actors involved, i.e. local and regional actors, companies, financial institutions, real estate owners, other representatives of the business community, etc.”

According to James Brass this work is continuing and is moving forward. He emphasized that partnership is a key factor for success. He then talked about the elements that allow an airport and the regional economy to grow. These growth facilitators include land, surface access (transportation) and access to labour. Growth drivers include international trade and investment, inbound tourism and key sectors and clusters. He stated that key activities in this methodology involve document review, survey of STRAIR regions, and themed workshops.

“The themed workshops were an effective way of getting views from many people and creating a better understanding among partners that they are in fact part of the action plan.”

Key findings showed the need for defining a joint vision – “what do we want to accomplish?”

“We have to work on selling the “airport region” and the benefits of expansion. We have to communicate the benefits and involve airport-related companies in the economic development. We need interaction between the private and public sectors. The public sector can help in providing information and comfort to attract airlines.”

The project established an overall vision of making the Stockholm Arlanda Airport Region the fastest growing economy in the Stockholm Region by 2012 with a thriving Arlanda Airport at its heart.

Other key findings defined the Airport Region and established an identity – the 4+1 collaboration, and identified the role(s) that the collaboration can play in defining the initial scope for an Action Plan.

“Now we have set out a number of options for the short-term and long-term structure of the collaboration and the next step will consist of capitalising on the momentum created, formally signing up to the Outline Strategy, establishing a Project Board, identifying an appropriate vehicle for implementing the Action Plan and defining and implementing the detailed Action Plan.”

## **Business cooperation and New Training Needs in the Barcelona Airport Region- case Viladecans**

Salvador Curcoll, GPA Barcelona Chamber of Commerce

Salvador Curcoll reviewed the AER.CAT project, which consists of 55 Ha and is located near the Barcelona Airport and the city of Barcelona and has highway and rail access.

The first part of the feasibility study involved 17 companies (almost 50% of those targeted) and focused on park infrastructure requirements, lease/ownership preferences and pricing as

well as the cost of moving from present sites. The study also included an analysis of competing locations in relation to the size of the parks, plot sizes and prices.

“There were also industrial policy recommendations such as defining the regional goals for the aerospace industry, stimulating geographic concentration, enhancing the performance of industry and readjusting the industry and public organisations for the operational phase.”

There are many business cooperation opportunities. The BCN Airport Region Aerospace Industry is eager to cooperate with other companies throughout the world and will implement a Marketing Plan in 2008. Currently, the Aerospace Park is participating in Le Bourget and other activities performed by BAIE and the BCCI. This has created new training needs and employment opportunities and has resulted in a need to assess the demand for training and to take a look at the supply side, the present capacity for training in the region.

“In regard to training demand, we decided to survey the needs of aerospace companies in the BCN Airport Region about filling this gap and identifying the main industrial capabilities of these companies.”

This involved systems engineering, calculation and analysis of structures, automation systems and electronics.

“From the survey, we found that the labour force is quite young (between 25-40) and that their experience is mainly in management and project management. They have a high level of education and extensive training in technical subjects.”

The survey also showed that salaries were between 30,000-50,000 Euro/year and that the gender distribution was 82% men and 18% women.

“The survey also allowed us to inventory the education in Catalonia related to the aeronautics and space industry and confirmed a lack of this type of education in the area despite the developments of recent years.”

It was found that the main demand for training was in the areas of technical skills, languages and personal skills and that the main resources for these types of education were specialized training companies, specialized engineers and suppliers to the company. The next step was to identify professional profiles. These were operation management (9), Quality/Safety (1), Procurement (1) and Production/Assembly (3). Following that, the training needs were identified. The main needs were for software training (Catia), design, manufacturing and assembling, space and aeronautical units, commercial skills, languages (mainly technical

English and French), teams and project management and general knowledge of the aeronautical industry.

“To fill this training gap we have suggested to hold seminars for students to motivate them to follow an Aerospace career. We have also suggested to hold specialized training in the form of in-company cross-fertilization workshops and the use of more real case studies.”

It is hoped that these seminars and actions will stimulate “business to university” relations at an international level and that it will be possible to use the high level technical and business schools in the region to organise courses for cooperation between the universities.

## **A new approach to land use planning and accessibility- case Härryda/Landvetter and El Prat**

Mattias Frithiof, WSP Consultants

Mattias Frithiof began by presenting the findings from the Härryda/Landvetter & El Prat Pilot actions. Both have regional economies in the midst of structural change, which has resulted in new demands for regional planning as well as unique opportunities. El Prat’s findings illustrated that accessibility is of regional importance and it must be planned based on territorial and regional interests, i.e. airport and third parties’ interests must be integrated in a regional strategy, including airport landside activities. Accessibility is also challenged by environmental considerations where environmental capacity is dependent on airport accessibility with modes of transportation other than cars. The study showed that the context of the airport must guide the planning and that efficient airports provide “pass-through” stations in public transport networks, becoming unique transport centres in the region. Airports are regional transportation assets and should share in the costs and returns of major accessibility investments. One of the conclusions from the El Prat study was that a global and unique approach is required in order to reconcile interests. Airports and transport networks are dependent on political considerations and private interests. The direct relationship of airport growth on territorial development stresses the need of a common strategy in relation to airport accessibility. This last finding was used as the starting point for Härryda/Landvetter.

Härryda/Landvetter established a number of goals it wanted to achieve with the study. These included creating a common vision and a concrete strategy for the development of Landvetter Airport and the corridor connecting it to the regional centre, Gothenburg. Härryda/Landvetter also wanted to develop a climate of cooperation among the many players that have influence and an interest in the development of the airport-related businesses, to gain insight into the

various players’ ambitions and objectives, and also to provide planning input to the municipality and increase understanding of the airport’s role as a regional engine for growth.

“We specifically wanted to promote this as a regional and not a local project. We wanted to stimulate discussion and dialogue. How do we make things happen? Who does what? We also had to ask the question: why is accessibility important?”

STRAIR FINAL CONFERENCE- JUNE 14, 2007

He went on to explain that airports are no longer just places where planes land and take-off. They are now hubs of public transport. He also pointed out that accessibility is critical to airport growth. Environmental capacity is dependent on airport accessibility with other modes of transport other than cars.

“Airports’ roles are increasing. They are now multi-modal centres and not just destination points linked to the major city centre. Efficient airports provide a “pass-through” station in public transport networks. Regional connectivity should be the goal. To achieve this, airports should share the costs and the returns. Infrastructure investments are not enough.”

Mattias named the possibility of an “accessibility charge”- a charge to all passengers via airfares where this money would be used to further develop public transport, to promote public transport by making it the least expensive alternative.

He also spoke about the integration of transport operators to make travelling more efficient. Agreements between train operators and airlines need to be expanded to shorter stretches of the journey. He illustrated this by asking the question: “If door to door services are a successful option for freight integrators, why wouldn’t they be feasible for passenger transportation?”

In this project, the airport and transport networks are dependent on political considerations and private interests. There was a need to create a common vision and foster cooperation and interest in the development of airport-related business.

“We worked in phases: the preparatory phase, which consisted of knowledge building and creating effective processes, and the implementation phase involving workshops, experts, and creating relations with sector authorities, mainly rail and road authorities.”

The project was focused on creating a widespread and jointly accepted vision of the future and also to create lasting personal relationships between players that do not usually cooperate; the public and private sectors.

“It was all about making it concrete, getting private market players involved, and being selective. We cannot compete with the city centre so we have to act as a complement by creating a unique identity and focusing on accessibility. Research has shown that dynamics in peripheral areas are vital to the core.”

## **Models for analysis of flow of goods and services in airport regions- “The Oslo-project”**

Svein Hoelsaeter

Svein Hoelsaeter told how the organization of the project originated with SNP Gardermoen and Kate Wilhelmsen. Midway through the project, Oslo Teknopol replaced SNP Gardermoen as functional lead partner.

The background and objective of the project was to carry out a case study of transport and logistics in Eastern Norway focusing on delineating the airport region through an analysis of the flow of goods.

“The main questions we asked were can an airport generate growth regionally by contributing to the development of freight services in a region, and if so, how can the regional boundaries be determined?”

It was found that, in general, a region may be delineated through insight into key characteristics shared by a set of players located there: factors such as a common labour market, infrastructure, competence, etc. An analysis of freight transport may be used as well since a group of players form a region if they share a transport or logistics operator or infrastructure, freight terminals, etc.

The key factors that were mapped in the survey were shared logistical resources, freight characteristics, access to infrastructure, importance of air cargo, industry belonging and number of employees.

In conclusion, Svein Hoelsaeter stated: “The report investigated if a freight and logistics cluster was developed in connection with the establishment of the Oslo airport. The main conclusion was that there are several indications of such a cluster formation in the airport region. The relatively high percentage of firms that have been established demands advanced logistics solutions and there are also indications of a well-developed low cost and high quality supply of transport services in the region.”

Official airport statistics suggest that the airport area serves as an important hub in the Norwegian transport system.

## **How to maintain and further develop what has been achieved- Panel discussion moderated by Mr. James Brass**

### **Participants:**

Javier Morales, Canary Islands Government’s Commissioner for External Affairs (politician)  
Svein Hoelsaeter, Oslo Airport Region  
Maria Wall Petrini, LfV Stockholm Arlanda Airport  
Jan Holmberg, Chairman of Municipal Executive Board, Upplands Väsby (politician)

Sergio Alegre Calero, Local Government, El Prat De Llobregat (politician)  
Raquel Millian, Vildecans City Council  
James Cunningham, Renfrewshire Council  
Patrick Zutterman, West-Vlaamse Intercommunale, Ostende  
Mattias Frithiof, WSP Consultants, Stockholm-Globen

Each panellist was asked 5 questions.

**James Brass:** Since many of you have already answered this first question earlier today, I'll only put this question to the politicians Sergio, Javier and Jan.

### 1. What attracted you to the STRAIR project?

**Sergio Alegre Calero:** The airport makes up 65% of the municipality and it is important to improve the economic, planning and governmental aspects of the region.

**Javier Morales:** We are located far from Europe and have a relatively isolated and small market. Air transport is important for all our activities. To be competitive we must create cooperation and improve communication with neighbouring countries. It is important to link with our European neighbours in order to improve the future of our people.

**Jan Holmberg:** We wanted to stimulate growth in the region and create better cooperation between the airport authorities and municipalities.

### 2. What do you feel have been the key achievements so far from your project and the STRAIR project as a whole?

**Javier Morales:** Working in a network is important and a good way to share experiences. We have learned to do things and to create new services, to identify problems and find solutions.

**Mattias Frithiof:** The reports may seem local but a huge amount of knowledge is obtained from them. I also think that the realization that any endeavour will need coordinated efforts from many players in order to succeed. Another achievement is that players now know what each other want. They have met and that is a tremendous achievement.

**Sergio Alegre Calero:** I agree. Knowledge about infrastructure, best practices and comparisons of the projects.

**Raquel Millian:** The knowledge we have gained from partners. We have been able to make many things a reality.

**Maria Wall Petrini:** Closer cooperation with municipalities and progress in having 4 municipalities, 1 county and an airport speak with one voice regarding infrastructure and investments.

**Jan Holmberg:** Confirming that the airport creates growth and that we need better cooperation and coordination with airport authorities.

**James Cunningham:** We have gotten financial support and contacts with operators of MRO facilities as well as guidelines for expanding routes. The land and accessibility studies have also been extremely valuable.

**Patrick Zutterman:** We were interested as a landowner of a business park and needed knowledge and expertise with this. We realized that an airport involves both opportunities and threats. It was good to be involved with STRAIR and we found that having an airport is of strategic importance.

### **3. How has the partnership approach to your individual project and to the STRAIR project as a whole helped you in achieving your objectives?**

**Javier Morales:** The partnership has helped by showing how small territories with small markets can become competitive and that airports provide opportunities to learn and to compete. Knowledge about how we can translate this information and adapt it to our needs is also important.

**Mattias Frithiof:** Partners appreciate being able to focus on their studies and establish a municipality as an international player. Municipalities have also learned about airport problems and limitations. Partnership is the key; it's the process. The real value is that this is a good way to ensure development.

**Sergio Alegre Calero:** Good administrative and economic work has been done. The partnership approach has worked very well. Without it the results would be very different.

**Maria Wall Petrini:** Being able to exchange ideas and experiences have helped immensely.

**Jan Holmberg:** This is our first EU project and we are very happy with it.

**James Cunningham:** I would like to recognise the professionalism shown by Kate Wilhelmsen. Everyone wanted to participate but no one wants to be the lead partner.

**Patrick Zutterman:** The advantage with a partnership approach is the scope of development potential with different partners working on different aspects. This provides a wider scope of ideas to go further.

### **4. How do you see the results of your work impacting your region over the long-term and how are you going to ensure that these impacts come about?**

**Javier Morales:** Transport is key. We now know that these markets are for all islands, not just a single island. Airports, harbours and highways are connecting and providing services and we are making new connections between the Canary Islands and our neighbours.

**Mattias Frithiof:** I think we can turn that question around and ask “how do you see your work impacting other regions?”

**Raquel Millian:** I think many lessons have been learned from the studies and we will be able to use this information in the future.

**Jan Holmberg:** We’ve learned that it is a step-by-step process and that is how we have to work.

**James Cunningham:** Each study has to be designed to benefit the local partner as well as the other partners.

**5. What are the key lessons you’ve learned from undertaking this project that you would pass on to others seeking to undertake similar work?**

**Javier Morales:** That even though we are interested in creating new services, it is difficult to find operators. We have tried to connect to the US and create business between the US and Africa but have not been able to accomplish this due to rules and laws. We have to intensify our work; with business, government, etc. to benefit everyone.

**Mattias Frithiof:** That we have to aim for a high level of implementation; to be concrete. If you put the relevant players in a room together something will happen.

**Sergio Alegre Calero:** We’ve learned that this is very worthwhile, that we need to try and find a common base and not focus so much on details: to be flexible and let experts help you. We’ve learned that you get more results and contacts than you expected.

**Maria Wall Petrini:** To be open-minded and learn from other regions. I hope that this network continues.

**James Cunningham:** We’ve learned how similar we are.

**Patrick Zutterman:** We’ve learned that you need a good lead partner. When looking for partners try to find those who are similar to you.

## **Reflections by ARC members**

**Bengt Christensson, ARC General Secretary:**

“Being successful means having a network. These results are impressive. I would like to thank you all. Connections have been made. We have found that there are different ways to approach this- through the studies or process approach. Accessibility is a key issue and the work that has been done has a European dimension. I think we’ve also learned never to underestimate the studies and that airports are prime motivators for economic development. We are a global industry but the effects are local and there is a growing concern about

regional views. You have provided a great deal of information about inter-modality and air and rail connections. Thank you for this valuable input.”

**Elzeline Dejong, City of Amsterdam:**

“All regions acknowledge that airports are driving forces but have realized that working together with other players is extremely important. Smaller regions are trying to attract businesses while in Amsterdam we are trying to identify those businesses we don’t want. Airlines are going to go where the business is. It is important to cooperate. Make sure that the airport is accepted in your region and that residents understand the value that the airport creates.”

**Tex Pemberton, politician- West Sussex:**

“I’m happy to see how far ARC has come and I would like to congratulate the STRAIR team. It is important to balance the pressures from business with those related to environmental impact. By that I mean noise, emissions, capacity, and night flying. Two words that I haven’t heard here today are “climate change”. These two words will drive the future of the airline industry and airlines and makers are aware of this pressure. Traditionally, airports have been considered land-to-air transport centres but now they have also become land-to-land transport centres. There are major shopping outlets at airports and we have to become better at exploiting the versatility of our airports. In the future, master plans for airports will be formulated by organisations like STRAIR.”

**Closing comments by Andres Käärrik:**

“I’ve been involved in the transportation sector for around 20 years now and seen that when technical people, politicians and the general public discuss problems there is a lot of talk and very little understanding. We have to make people understand that there is sometimes a lead-time of 10-15 years. It is important that we visualise this to the public. We have to be somewhat like evangelists. Another problem is that the public does understand but doesn’t want a solution. If we propose a new highway or runway or other development we have to visualize why this development and this airport is good for them. Show them that the airport is good for them. Show them that the airport is good for all of us. We have the concrete answers to create money, wealth and welfare.”