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Airports as poles of economic development

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ARC

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Airports as poles of economic development

A word from Sergi Alegre Calero

President of the Airport Regions Conference and Vice - Mayor of the city of El Prat de Llobregat

On behalf of the Airport Regions Conference I would like to thank you for picking up this booklet and reading it. I would also want to express my gratitude towards the Societée Walonne des Aéroports (SOWAER) for organising this event. Last, but not least, my warm thoughts go to all the participants to this conference, coming from so many different horizons.

We have learned a lot over the two days of speeches, informative presentations and lively discussions. And because we believe this is the role of ARC to disseminate information, to foster debates and exchanges of ideas, we want to disseminate the valuable information that we received in Genval, during this conference, to our partners all over Europe and beyond.

Airports are often key to the development of regions. They allow for connectivity, mobility, they may generate jobs for residents and increased revenue for businesses. This being said, as local authorities in charge of the general development of our regions, we know that this economic driver's role is only the beginning of the story and that it is our task to need to ensure the right balance with all the impacts of the airport. In Genval we discussed about that and how to further the relationship between airports and their neighborhood, with the businesses and the population living nearby and how to create win-win situations.

We have taken notice of success stories all over Europe, airport

cities developing, airlines wishing to do more business with airports as well as people benefitting from the economic impacts.

This conference couldn't have come at a better time. In a moment of economic hardship, we have been given the evidences that actions can be taken, and that airport regions have indeed their role to fulfill.

There is room for growth, for improvement and productive relationships. I know that these proceedings will shed some light over the capabilities for the regions and their airports to grow together.

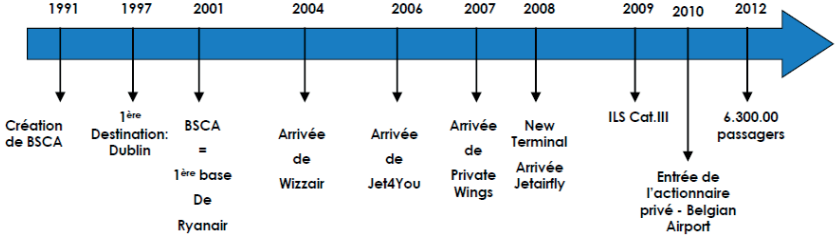
Sergi Alegre Calero

Economic Impact of passenger air transport

Brussels South Charleroi Airport
A closer view on the success of the airport and the reasons behind it

Jean Jaques Cloquet is the general director of Brussels South Charleroi Airport (BSCA).

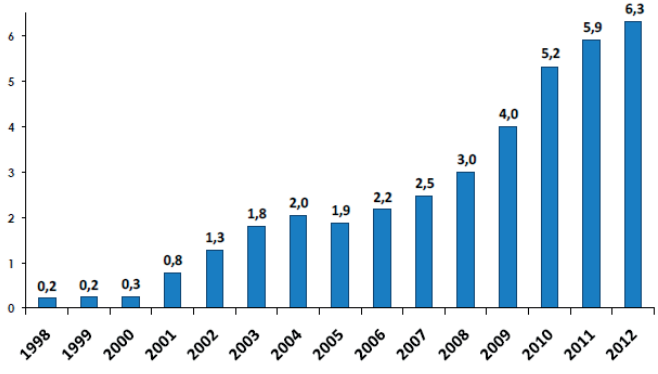
A substantial part of the development in the last years in the airport has been linked to low cost airlines setting up their bases there. For example, Ryanair started flying to Charleroi in 1997 for the first time from Dublin. In 2004 Wizzair also began flights towards Eastern Europe. In 2009 the airport has installed an ILS Category III landing system, thus making it easier and safer for planes to land on the airfield.



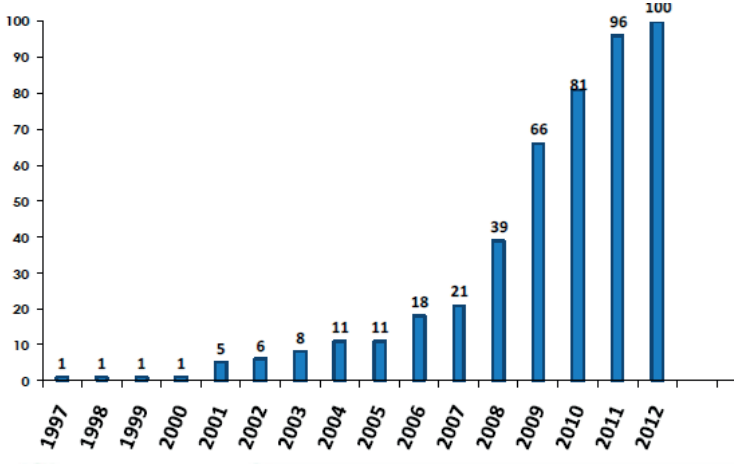
A brief history of the airport development

In 2012 the airport served around 100 destinations in 25 countries with 6.3 million passengers, boosting a significant growth over the past decade and becoming one of the most important regional airports

in Europe, and one of the fastest growing at world level. On a daily basis, it translates to some 120 flights a day in and out the airport carrying 16.000 passengers and 6.000 bags daily.



Evolution of passenger growth

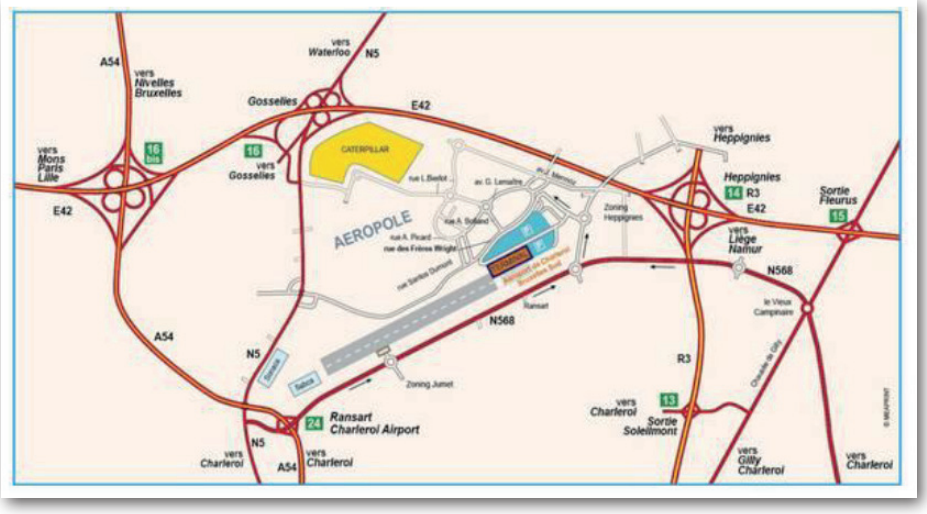


Evolution of destinations served

While European airports were stagnating or losing passengers and destinations BSCA was increasing at a very high rate. In 2009 while at European level airport were losing 5.9% of traffic, BSCA was increasing by a staggering 33%, a high growth rate that continued throughout

the period of crisis. In 2011 BSC grew by 14%, three percent more than the European average.

BSCA also monitors closely a passenger profile, thus presenting the nationality, place of residence, frequency of travel and reason for travel for its travellers. 72% of people flying to and from BSCA are Belgian, while 14% are French and 9% German. The distribution inside Belgium is pretty equal between Wallonia, Brussels and Flanders, thus showing the attractiveness of BSCA at a national level. Half of the yearly passengers just travel once, while 21% twice, 19% three to five times and 7% six to ten times a year. The main reason for travel from BSCA is family visit.



There are still obstacles to the airport growth that need to be overcome but in the main run the operation is based on four main pillars:

1) Operational level

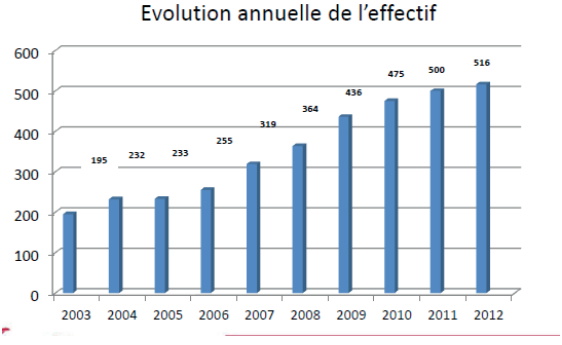
In regards to the operational level, focuses its efforts to meet the low cost turnaround standard of 25 minutes. The airport can operate at night and is constantly training its staff to be more productive.

2) Technical level

At technical level there are new parking areas and gates, as well as a new taxiway and Instrument Landing System.

3) Human resource level

Human Resource wise the flexibility of the staff is essential and it implies putting in place different hiring patterns in order to meet seasonal needs. . The specific needs for night shift , 24/7 operations have been understood and facilities have been put in place to support employee's facilities (night and day care for children of staff)



4) Accessibility

Lastly, in terms of accessibility, BSCA is close to major highway interchanges, making it easily accessible by car; there are a variety of shuttle options and there is a fast access and small waiting times at security checkpoints and gates.

Based on these pillars, it was mentioned that 95% of the flights are on time and that there are few complaints from passengers related to the airport itself.

The future

The future plans for BSCA are split into two categories – the 2012-2016 immediate period where there are detailed structures that will be put into place and 2016-2020 where there is a general idea as to what can be done at that point.

The airport is planning in the next four years to diversify the airlines that operate on its field, build a new control tower, more commercial development, lengthen the runway and develop real estate around the airport. After 2016 a railway station is planned that would connect BSCA by rail with the rest of Belgium.

TO BE REMEMBERED

It is possible to build on a success story out of low cost. The success of the airport comes from the conjunction of meeting the needs of a fast growing business(specific needs of low cost industry, infrastructures, technical equipment, knowing clients / passengers profile, providing sufficient accessibility to go beyond national borders.

"Airports Role in the Economic Development of a Territory"

Camillo Bozzolo is the Venice Airport Sales Director

The airport's role in the Economic Development of the Territory

What history teaches us is that the territories with the best access win: The airport's role is closely linked with that of the territory; there cannot be passenger growth without the territory's economic growth and vice versa. Location matters, in order to provide ease of access and ease of doing business; It is unthinkable to locate an enterprise in a difficult to reach city. As Seneca the Italian philosopher said "time is the only thing that once stolen from us, can not be given back", in this sense a travellers' time, a person's "travel time" can also be considered as time sensitive goods.

Venice Airport's Strategic Vision

The aim of the Venice airport is to strengthen its positioning as the third intercontinental airport in Italy, with priority on North Atlantic, China & Far East Develop a virtual hub positioning for one or more worldwide alliances, integrating existing network with intercontinental flows as well as with Eastern Europe flows, and to become a gateway to the Balkan area and Eastern Europe Ensure the coverage of a capillary Mediterranean network.

Additionally, the airport recognises itself as a regional airport, and while not being a hub, it still believes in potential synergies and connectivity between the different airlines operating there. Given that a large portion of the passengers of the airport are unable to reach their final destination with a nonstop flight, it has developed a 4 point strategy to address this concern, i.e. Better serving its catchment area as well as improving accessibility for passengers from abroad.

Venice Airport's 4 Point Strategy

Strategy for Territorial Accessibility & Passenger Growth

A Strategy based on Territory

1. Home based carrier: Capillarity in the immediate territory.
2. Links with major hubs: in order to guarantee the catchment area accessibility to the world.
3. Point-to-point: Non-stop access to high passenger volume destinations (Low Cost Carriers).
4. Intercontinental's: Penetration of further afield territories through intercontinental hubs.

A Short Analysis of Passenger Growth

1. Tourism
2. Industry/Economy
3. Ethnic
4. Local Population

Venice airport has ventured out in an effort to understand the needs of local business when trying to attract new airlines. The airport's relationship with a number of companies in the territory is an example of this strategy.

The impact of Venice airport on Local Employment

ACI Europe made a study in 2004 called "The social and economic impact of airports in Europe" which focused on 25 European Airports; the results estimated the number of workplaces per million passengers. They looked at:

Direct workplaces: positions and salaries directly linked to the airports activities.

Indirect workplaces: positions & salaries along the supply chain of

goods and services directly linked to the operations of the airport.

Conclusion: Is the Investment worth it?

Airport commercial development can be considered a "virtuous circle" with passengers, flights, and business/economy all interlinked. If you can increase the number of flights at your airport, that in turn will bring more passengers, more tourism for the region, and more companies that relocate thanks to accessibility. More businesses bring more commercial exchanges, more jobs, and more passengers to the airport. More passengers therefore, bring more flights.

Is the investment worth it? Consider the US example of Birmingham, Alabama and Atlanta, Georgia. In 1963, Birmingham had a much larger population than Atlanta did. Today, Atlanta is one of the most populous cities in the United States and is home to the world's busiest airport, Hartsfield-Jackson International, with over 92 million passengers in 2011 and 923,991 aircraft movements. Early on city and state leaders made the airport a focus of the city's development and that created a "snowball effect," into what you have today, the US city with the third largest concentration of Fortune 500 companies.

TO BE REMEMBERED:

A territory's economic development is closely intertwined with its accessibility, airports play a major role in guaranteeing accessibility. The flow of people will be driven and fed by both economic development & accessibility creating a virtuous circle.

Airports as development hubs in terms of training and employment

"Benefits in terms of job and activity creation in and around airports"

Sergi Alegre Calero is the president of the Airport Regions Conference

The Airport Regions Conference (ARC) is an association of regional and local authorities across Europe with an international airport situated within or near their territory. The ARC was set up in 1994. There are currently more than 30 member regions, representing a population over 60 million people. More than 30 major international airports in Europe are located in ARC regions, handling over 600 million passengers per year.

Theory of Economic Impact on Airports

ARC is the democratically elected representatives of all the people who live nearby an airport, the local and regional authorities hosting and neighbouring an international airport, and the voice of local and regional authorities for dialogue with aviation stakeholders, economic and institutional partners at national, European and international level.

ARC Core Values:

The ARC stands for the **quality of life** within its member airport regions

This **quality of life stems from the harmonious and sustainable operations** of airports.

The **ARC fosters cooperation**, dialogue and concerted development of airports and aviation.

Figure 4: What does Mr. Calero deal with as a politician

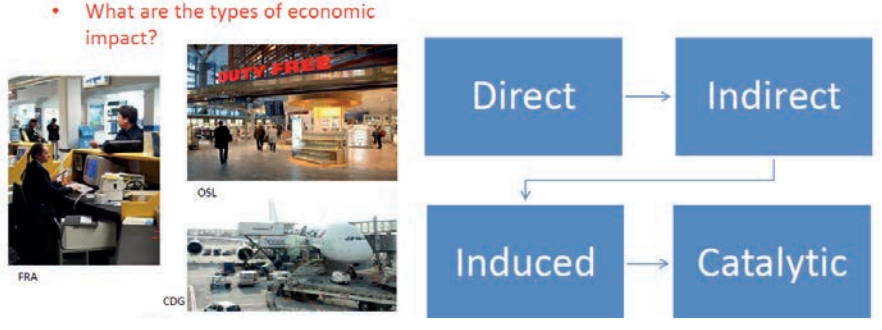
There are 4 types of economic impact an airport has on a region. They are:

Direct: "The output and employment of the firms in the aviation sector." Operation of airlines and airports (technical support and handling, catering, fuel, security, cleaning), commercial activities (shopping, restaurants, car rental, parking), land transport and air cargo.

Indirect: "The output and employment supported through the aviation sector's Belgium based supply chain." Buying supplies (goods and services) to support direct activities.

Induced: "Employment and output supported by the spending of those directly or indirectly employed in the aviation sector."

Catalytic: Spillover benefits associated with the aviation sector. Some of these include the activity supported by the spending of foreign visitors travelling to a country via air, and the level of trade directly enabled by the transportation of merchandise.



Airports have a profound impact on the region, the quantity of jobs you will get and types of jobs you will get matter most. Airports provide connectivity.

What does this mean for regional airports?

Regional airports are a source of Jobs with ACI statistics showing that Regional airports contribute 500,000 local jobs, and 1,000,000 regional jobs in Europe. Regional airports attract foreign direct investment and increase connectivity to the region. However, the vast majority of regional airports are unprofitable and there are several challenges for the foreseeable future including the volatility of low cost airlines, the fact that since there is no hub, there is no job guarantee and the increasing need to diversify the number of airlines serving the region.

What does this mean for hub airports?

Airports also serve as economic catalysts for hub regions, and again

are often a means of attracting increased economic activities such as inward investment and inbound tourism. There is an induced impact as well with employment and income generated in the in the airport region being spent in that region.

Some case studies include Paris: The Ile de France Region generates 30% of the French national GDP with CDG Airport playing a contributing factor with access to Paris-CDG is a key factor in company location decision. Additionally, Air France is the private largest employer in the region. Vienna: Connections to Eastern Europe offered by Vienna Airport have enabled Vienna to provide location for the East European headquarters of several global companies.

The hub model is in danger however due increasing Environmental concerns, the rise of Low Cost Carriers and the rise of Gulf Carriers.

Conclusion: Challenges for the regions

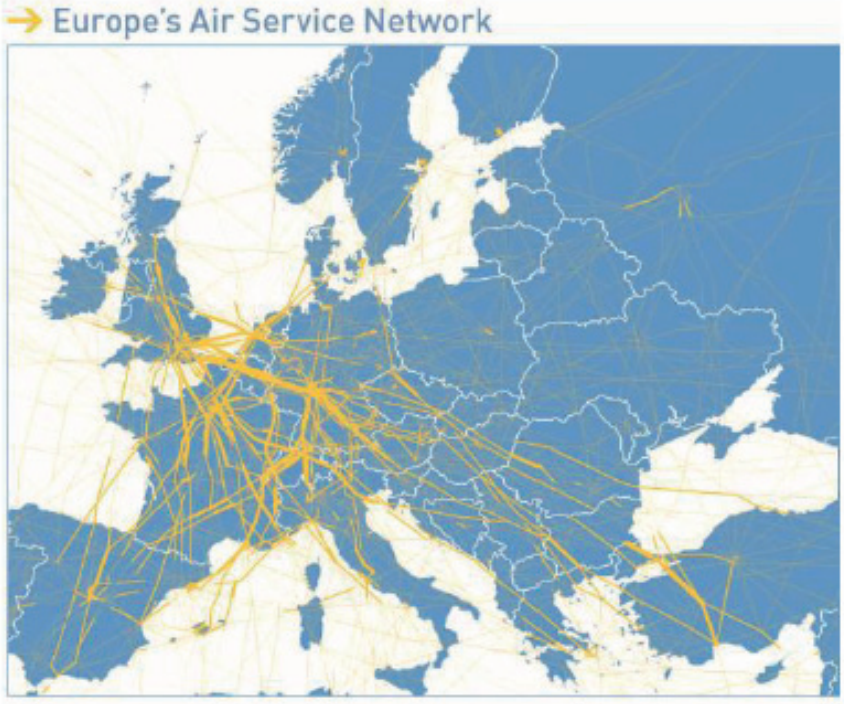
Urban planning needs need to be considered for City Airports as people want to live near the airport for convenience. In Asia and the Middle East everyone is on the "same page" of sorts or that the airport and airline are all talking and meeting together where in Europe there are still many challenges to this model.

Intermodality also needs to be considered and more intermodal connections need to be made. Studies have shown that in Gothenburg and London Gatwick good transport intermodality connections have been planned accordingly and there is significant environmental benefit.

There is also the need for trained people. Vocational programs for the people in airport regions, in order to connect spatially with regional airports.

TO BE REMEMBERED:

Above all ARC stand for quality of life in its member regions and this quality of life stems from the harmonious and sustainable operations of airports.



Source: EUROCONTROL

Wallonie Aerotraining Network (WAN)

*Anna Cecconello is the General Secretary of the "*Wallonie Aerotraining Network*", an aeronautical training center based in Wallonia near Brussels South Charleroi Airport.*

A training center created by the industry and institutional partners

WAN provides

- technical training in design and manufacture (all technologies and methodologies related to the design, the manufacture, the fastening, the cells control, engines and other avionic equipment) ;
- technical training in maintenance (a cluster of training courses related to aeronautical maintenance in airports or industries alike for aircraft, propellers and all onboard equipment) ;
- airport staff training (training courses for all types of ground staff to ensure the reliability, safety, efficiency and comfort for air transport users) ;
- airline staff & flight operation agent training (specific cabin crew and flight operation agent training courses).

WAN management Board comprises a variety of actors : airports, unions, employment agency etc.

The importance of aeronautic training relates mainly on its constant evolution. Standards and technology change very quickly, thus workers in the field have to already possess vast knowledge on their specific area, but also often re-train. The school offers a large range of aeronautical jobs.

A center offering a large scope of training

WAN does technical training for design and construction including technologies and methodologies related to the design, manufacture, assembly and control cells, engines and other avionics. There is also technical training in maintenance that includes a set of training courses for various skills related to aircraft maintenance, both at airports and in maintenance facilities. Airport courses train ground staff to ensure the reliability, safety, efficiency and comfort of air travellers. In terms of aircraft operations, the school also offers cabin crew training.

The school also acknowledges the importance of appropriate recognition of its certificates by international bodies such as IATA, ICAO and EASA and strives to maintain these standards.

BE.147.002 : technical certification « PART-147 » from the Belgian Air Transport Authorities.

BE.CCITO.001 : « Cabin Crew Initial Training Organisation » certification from the Belgian Air Transport Authorities, EU-OPS (European Union – Operational Procedures of Safety), EASA (European Aviation Safety Agency).

Addressing professional, future professional and helping the requalification of people

Another aspect of the WAN training relates to its students, more specifically the type of people interested in jobs in the industry. WAN categorises them into three sub-groups: Students – these are the ones interested in pursuing a career in the field of training, job seekers – these are the people who are interested in training in this field in order to find a job, since what the field they are already trained in may not bring the same advantages and Employer – these are the people who are training in order to improve their qualifications or advance in their career.

The WAN training programs are elaborated jointly with industry professionals, since the school is trying to produce graduates that would be able to find a job quickly in specialized fields. The industry dictates those fields on the basis of supply and demand, thus many of the classes of WAN are tailored to the industry demand at a particular point in time.

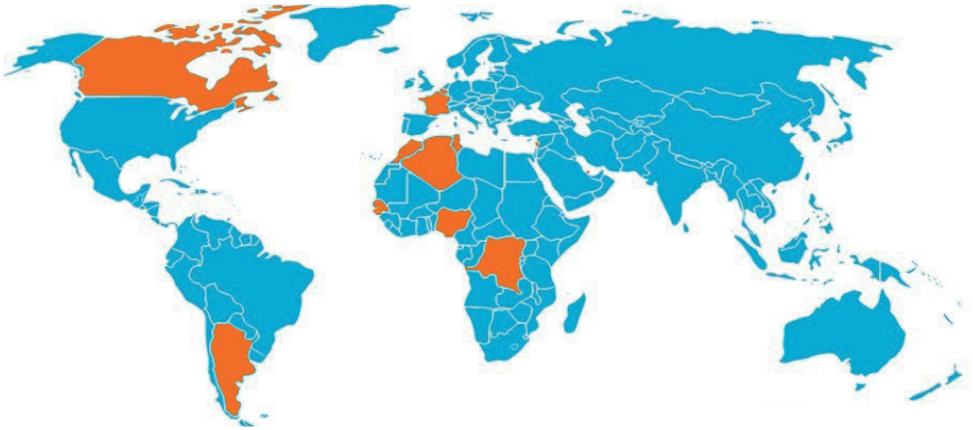
The school states that their evaluation criterion is high, thus producing skilled individuals. An aviation baccalaureate has also been created and provides the graduates of the Walloon school with an authorized diploma in their field.

International positioning through agreements and recognition of diploma

There are few centres like WAN in Europe, the training offer in the field being quite limited, thus the importance of having the school in the heart of Belgium is paramount to the workforce in the main Belgian airports and not only.

When lives depend on airplane maintenance, and safety operations on the ground, the quality of education and training in the field becomes very important. Thus, the aeronautical school is basing a good deal of their activities on goals such as defining simple and quick procedures with public authorities and training operators, extend networking with other countries, work in compliance with international standards or organizing training abroad.

The school also collaborates with a number of similar projects in Europe and North America and is an active member of the International Formation in Air and Space Centre. WAN gives about 125.000 training hours per year and has around 4.300 students.



International Partnerships of WAN

TO BE REMEMBERED

The keys to the recognition and success of the training center are: the international recognition of the education provided, covering comprehensively the various fields of the aeronautical and airport jobs.

Adaptation to industry needs, recognition of the diploma requires full cooperation between actors for the identification of the needs and successful employment of the pupils.

Economic dynamics geared to air freight transport, logistics and intermodal transport

Transport and Logistics: essential economic development players in Wallonia

Bernard Piette is the manager of Logistics in Wallonia

Why Wallonia?

60% of EU purchasing power is in the red zone within a few hours' drive of the Wallonia region. Additionally, Wallonia is a fully "multi-modal" region. The region is located within a few hours of all the major cargo main hubs (less than 200 km).

Located between Frankfurt, Paris-CDG, and Amsterdam airports which account for 66% of total air freight in Europe and if you add London-LHR that number rises to 75%

Future Trends

China exporting from Chinese ports is the trend for the future and is being watched closely by the cluster: The Chinese Ministry of Communications forecasts that Chinese container volumes will triple by 2020 (see chart on slide 18).

However, external factors also must be considered. These include: oil prices, CO2 emissions (environment), no dramatic change in energy supply before 2030, change in consuming habits (e-commerce, living in cities), and change in logistics concepts (pricing of externalities, city logistics, evolution of industrial and contract logistics).

Some ways to address this include reconfiguring Transport networks (such as the EU funded TEN-T), building of news infrastructure, the increase in technological advances (real time monitoring, process monitoring), and most importantly using transport and logistics as a leverage for competitiveness.

Marshall Plan

Logistics in Wallonia has created a "Marshall Plan" to address these factors which consists of the creation of new competitiveness clusters, building on the existing economic situation, gathering a critical mass of actors, fostering the collaboration between companies and universities through research & innovation, setting up innovative projects, and increasing international visibility.

TO BE REMEMBERED

Wallonia is striving to be a worldwide logistics centre, having implemented a wide range of infrastructure that is able to make logistics a profitable business in the area. Logistics in Wallonia is at the forefront of development in the area, creating programs that are bound to improve competitiveness and create more business opportunities in the future.

Development of economic activities at Liege Airport

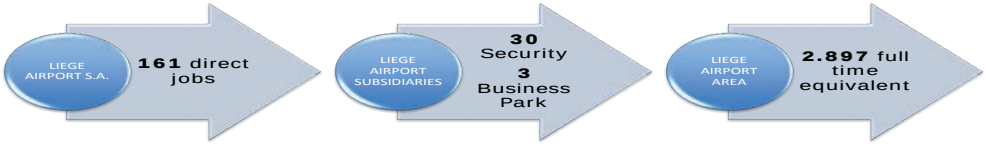
Frederic Heselmans, Business Development Manager at Liege Airport.

Twenty years ago, deep in the throes of an industrial crisis that struck the Liege region, some people had a vision for its airport, which was at that time a vast military airfield without a future. It would become a centre for a major economic reconversion of the entire region.

Nowadays, this vision has not only become a realty but above a real success.

This project obtained the unanimous support of the region's political and economic forces. This is one of the keys of its success because the strategy adopted for Liege Airport was clear and based on accurate analysis with a vision. LIEGE AIRPORT is both a business partner and an engine of economic growth. It symbolises the dynamism of the entire region.

The rapid economic development of the airport has brought about a large number of possibilities for employment. The airport itself offers 161 jobs on site, its subsidiaries another 33, and the on-site direct jobs created amount to approximately 3.000. Globally LIEGE AIRPORT has contributed to the creation of more than 10.000 direct and indirect jobs.



The strategy

The airport development has based itself on four main pillars : Flexport (for cargo), Simplifly (for passenger), Business Park and Extra-aero & New Businesses.

The Flexport®

Since its creation, LIEGE AIRPORT has focused primarily on FULL CARGO, but has now decided to take the next step and set itself the goal of becoming The Flexport ®. The title represents services tailored to the needs of cargo operators and a real alternative to congested, restrictive and prohibitively high cost large airports.

Continuous growth has led Liege Airport to its current position today in the Cargo Rankings. Liege Airport is proud with it all time record figure achieved in 2011 by handling nearly 675,000 Tonnes of air cargo.

Liege Airport is now number 1 in Belgium, number 7 in Europe and number 33 globally.

Taking into account the fact that these figures are achieved with

freighter capacity only, where other airports rely heavily on belly hold capacity to increase the cargo throughput, it is clear that Liege Airport holds a unique position.

Open, accessible and fully operational 24/7, LIEGE AIRPORT stands out from competing main international airports. The airport's infrastructure and organization are designed to avoid any loss of time in the supply chain. A large number of actors operating at the airport guarantee perfectly tailored and optimized treatment whatever the operator's requirements.

LIEGE AIRPORT occupies a central position at the heart of the golden triangle linking Amsterdam, Paris and Frankfurt. Nearly 66% of European freight transits within this area. Thanks to an excellent, uncongested motorway network it is possible to reach the largest European cities in less than one day by truck, and therefore reach a potential of almost 400 million consumers.

Space available for development

LIEGE AIRPORT offers numerous location opportunities for cargo operators, forwarders or logistics centres. Liege Airport offers not only more than 60ha of greenfield with access to runways, but also over 300ha dedicated to logistics in the immediate vicinity of the airport.

Total quality

LIEGE AIRPORT provides personalized, high quality services through a professional organization and highly qualified employees. LIEGE AIRPORT is committed to **producing and delivering full added value to its customers.**

Simplifly ®

Simplifly refers to the passenger division of the airport. Currently the airport handles around 300.000 passengers, but it can accommodate one million passengers. The demand exists, the airport is situated geographically in an area that make it attractive both domestically, but also for travellers from Germany or the Netherlands.

Business Park

Currently at Liege Airport there are 3 offices buildings regrouped in one business centre. There have been significant investments in office and warehouses infrastructure and the airport is expecting that this activity will continue to growth in the short term. New economic development areas are under construction.

Extra Aero & New Business

Linked to the passenger activities, the airport is also developing retail areas, including shops, hotels, restaurants as well as parking and transportation services. New business opportunities are also chased in link with passenger travels, leisure or services in general.

All in all, Liege airport does seem to be an airport that has a lot of possibilities to develop, and for much of it has already the infrastructure and capacity to handle an expanded flow of cargo and passengers.

TO BE REMEMBERED

Liège airport developed rapidly focusing on a unique positioning: being a Full Cargo airport and offering cargo airlines what they really expect : flexibility. Beyond this core activity, major development opportunities are also pursued mainly in the passenger sector and real estate.

TNT Express Euro HUB – Liège airport

Mr. Luc Gustin is the General Manager of the TNT Liege Hub

Mr. Luc Gustin talked about the hub of TNT Express based at Liège Airport and its implications both on the development of the airport as well as the region, through the extensive network of TNT.

TNT – a major express carrier

TNT Express is one of the world's largest express delivery companies. On a daily basis, TNT Express delivers close to 1 million consignments ranging from documents and parcels to palletized freight. The company operates road and air transportation networks in Europe, the Middle East and Africa, Asia-Pacific and the Americas. TNT Express had revenues of EUR 7.25 billion in 2011. TNT operates a fleet of 42 aircraft and over 30.000 vehicles, employing over 75.000 people in 63 countries and offering a variety of services in more than 200 countries.

Through its European air network, TNT operates 500 flights weekly from Liège to 68 airports, shipping 2.200 tons per week being 430.000 shipments. It is the number one operator at Liège Airport and looks towards increasing its capacity at the location.

Through its long haul network, TNT flies from Liège to New York JFK, Dubai, Shanghai, Hong Kong and Singapore – from there the cargo is able to connect to 600 destinations worldwide. For these long-haul operations TNT uses a fleet of Boeing 747s and Boeing 777s that run 15 rotations a week, transporting over 900 tons being 40.000 shipments.

Reasons for settling in Liège

TNT chose Liège as their European hub due the central location in Europe as well as the advanced cargo facilities offered by the airport. Liège proved to be an auspicious place for TNT because of the ease of cargo operations at the airport. Every night, the airport handles 42 TNT aircraft and 150 feeder trucks and vans, in order to send out the cargo overnight. 70% of the European air consignments of TNT pass through the Liège hub, making it indispensable for TNT in terms of the speed of their services.

There are multiple reasons for the choice of Liège as a hub for one of the biggest Express delivery companies in the world. They include the excellent geographical location of Liège, the efficient connectivity by road which permits the feeder vehicles to be able to move in and out quickly as well as the 24/7 policy of the airport, allowing for the aircraft to be operated at night in accordance with the business model of TNT.

Liège is also a regional uncongested airport which means TNT does not experience major delays because of the airport operations and it is oriented towards freight rather than passengers, thus having infrastructure that was specifically conceived for cargo movements. Liege airport gives also the possibility of self-handling. All of that combined with a strong labour catchment area including parts of Germany, Luxembourg and the Netherlands, as well as the opportunity for a strong

inter-modal network which includes rail, road and river to compliment air made Liège very attractive to TNT.

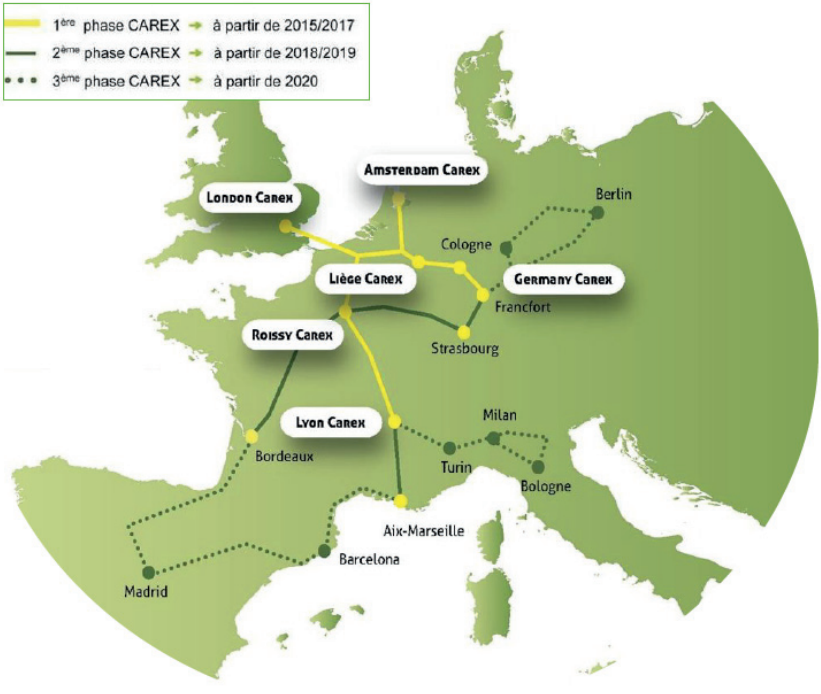
TNT is looking to expand its operations at the airport and this is backed by strong governmental support and commitments as well as possible land expansions of the airport itself.

TO BE REMEMBERED

Hubs, especially when talking about cargo, do not have to be huge airports with large passenger numbers – TNT actually chose Liege for its cargo-centric approach and the dedication of its services. As long as the facilities are appropriate investments from large companies are possible.

Euro Carex – The European Service Project of high speed rail cargo connected to airports and logistic hub

Stéphane Garnier is the intermodality chief of project and the project manager for Cargo Rail Express.



The Eurocarex concept is a simple one – it involves utilizing the existing high speed rail network for express cargo shipments on relatively short distances. Currently, for distance between 300 and 800 kilometres, either planes or trucks are required to be used for transporting freight, but Eurocarex is trying to change that.

Through a series of "Railports", which would be situated nearby existing high speed rails, as well as close to airports and major road interchanges, Eurocarex could provide an alternative to the usual modes of transport.

The project was initiated in 2006, as a public-private partnership, including some of the largest players on the world cargo market such as FedEx, TNT, UPS and Air France KLM Cargo. Eurocarex is actually a European project, recognized as such by the European Commission and supported by regional and national governments in Europe.

The future network would involve initially five main railports in Amsterdam Schiphol, Liege Airport, London, Lyon and Paris. The expected start of the transport is 2015 – 2017. More cities and airport will be added by 2020.

Eurocarex will deal with primarily transporting express cargo, freight with a value that would justify express transport, perishable products as well as luxury or electronic equipment that needs to be transported securely. Eurocarex will not deal with transporting heavy products such as steel, or any cargo that does not absolutely require 24 hour delivery.

The average capacity of a train will be of around 100-120 tonnes of cargo, which would be equivalent to average load between 100 and 120 tons per ream equivalent to a Boeing B747-400 Cargo or 3 Airbus A310 Cargo or 5-9 semi-trailers

Eurocarex will provide various types of services from Express to Fast, as well as a more economical 4 day option.

Momentarily the officials of the project are looking at two companies that could provide rolling stock for Eurocarex – Siemens and Alstom. Both trains would have a maximum speed of 320 to 350 km/h making it compatible with the existing European high speed rail.

In 2012 already a first successful test run of the project has been completed between Lyon Paris and London, with the involvement of all the parties participating in the project. A modified TGV train was used for the journey.

The plans for the future include finishing the studies on the environmental impact of transporting cargo with high speed trains, as well as formal engagement of the future clients for the company. Eurocarex is also in the process of looking for further national and European funding.

TO BE REMEMBERED

High-speed freight intermodality is on its way. A number of issues still need to be solved, but it seems to be a worthwhile option for medium distance freight.

"Intermodal connection of airports: the view of the European Commission"

Giuseppe Rizzo presented the view of the European Commission, DG Move

White Papers on Transport

White Papers are published by the European Commission and are documents containing proposals for European Union action in a specific area. They are based on multiple studies and extensive consultations of expert groups, stakeholders and citizens.

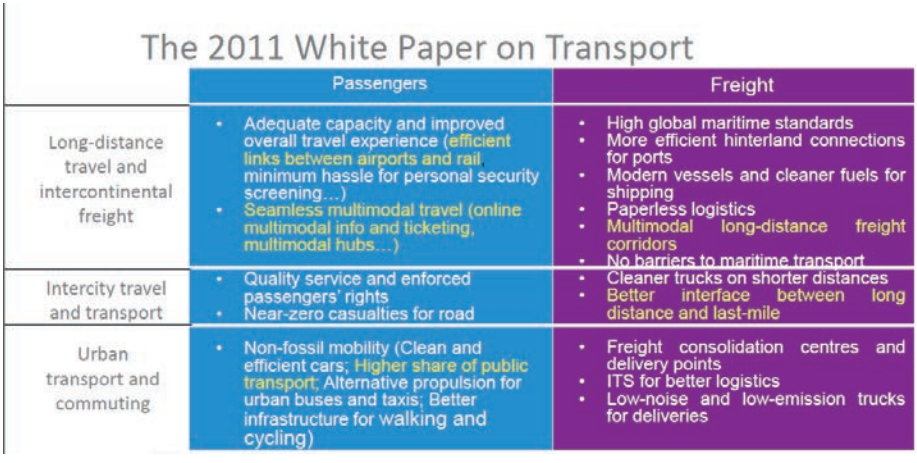
Already in the 2001 White Paper it was said that "*In passenger transport, there is considerable scope for improvements to make travelling conditions easier and facilitate modal transfers, which are still highly problematic*. [...] *Passengers have problems obtaining information and ordering tickets when the journey involves different means of transport.*" In the 2006 mid-term review of that White Paper a new concept

was introduced:" Co-modality i.e. the efficient use of different modes of transport on their own and in combination will result in an optimal and sustainable utilisation of resources. This approach is fully in line with the renewed sustainable development strategy, in particular its chapter on transport".

One aspect of intermodality that has been identified is integrated ticketing systems between different modes of transport. These systems still do not work properly and this is one of many aspects the Commission is trying to address. The latest White Paper on Trasport[1], adopted in March 2011 calls for "a new vision" of transport recognizing that:

- Curbing mobility is not an option
- A 2 layer multimodal network is needed; a core network based on large nodes (cities) linked between themselves with high capacity infrastructures needs to be connected to the comprehensive network feeding traffic from peripheral and less inhabited regions.
- Well defined priorities for investments are required
- Seamless door to door mobility
- Quality, accessibility, reliability of transport
- Better passenger rights, caring for elderly passengers, PRM
- Concentrating research efforts on added value

1 http://ec.europa.eu/transport/strategies/2011_white_paper_en.htm



Air/Rail Intermodality

The proposed new Trans-European Transport Network (TEN-T) Regulation sets as a goal that the 37 largest airports in the EU are connected to the TEN-T road and rail network by 2050 at the latest.

Air-Rail Intermodality is good because it makes travellers' lives easier, it links transport modes, makes airports more efficient, reduces environmental impact, and is a win-win for all stakeholders.

Types of Air/Rail Interface

1. Links to the city-which leads to decongestion of road traffic and better air quality around airports.

2. Links to the region- this also can lead to a decongestion of road traffic in the region, better air quality around airports, and most importantly a larger catchment area.

3. Links to other big cities-again a decongestion of road traffic, better air quality around airports, and most importantly a better usage of airport slots & aircraft. This is especially true in Europe where most of the major airports are capacity constrained and slot coordinated.

How to Become an Intermodal Airport

Therefore, in order to become an intermodal airport you need to decide on what kind of "intermodal services" you want to provide. The size of the airport including destinations served and if it's congested or not. The existing infrastructure needs to be examined to see what is available and what needs to be constructed and the distance from nearest rail tracks and the location and potential catchment area need to be analysed. It also needs to be verified if this is a good business case for rail operator, if there are sufficient enough rail frequencies. Air carriers' attitudes towards Air-Rail Intermodality can vary widely, with the largest network carriers being usually more in favour of such a "symbiosis" of transport modes. Low Cost Carriers are in principle favourable as far as it does not cost them a penny, while Regional air carriers may feel to be in direct competition with high speed rail.

Therefore it can be surmised that, linking rail and air is a delicate operation, however a win-win solution is usually possible. Some airports are "naturally gifted" at this linkage. The kind and "depth" of service needs to be chosen carefully considering that just having tracks does not mean that frequent trains will run all the time. And lastly that intermodality is teamwork!

Land Access by Road

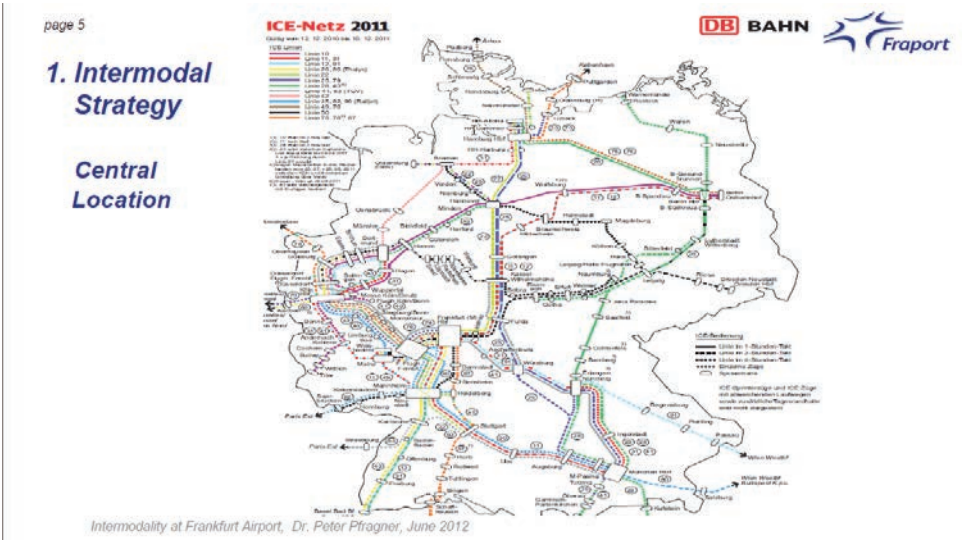
Bus and/or Coach are a good alternative for smaller regional airports. It can also act as a rail integrator with the schedule coordination being easier for buses than trains. Land access by road is more comfortable and leads to easier ticketing. Most common problems in this sector concern passenger information and frequency of services. Also, since you are not limited by rails, better accessibility means you have the opportunity for a wider catchment area by road. At the end of the day however, the success of a service is dictated by access time, not by the number of kilometres!

TO BE REMEMBERED:

EU is committed to intermodality. There are numerous types of transport modes and they are all unique and can offer different benefits.

"Intermodality Management at Frankfurt Airport"

By Dr. Peter Pfragner represents Fraport AG as an intermodal officer



Intermodal Strategy

Frankfurt is strategically located geographically in a very strategic location in the centre of western Germany with good connectivity in all directions of the rail network.

A few interesting statistics are that there are 174 High Speed trains a day calling at Frankfurt Airport. Last year alone there were over 5.5 million passengers arriving at the train station.

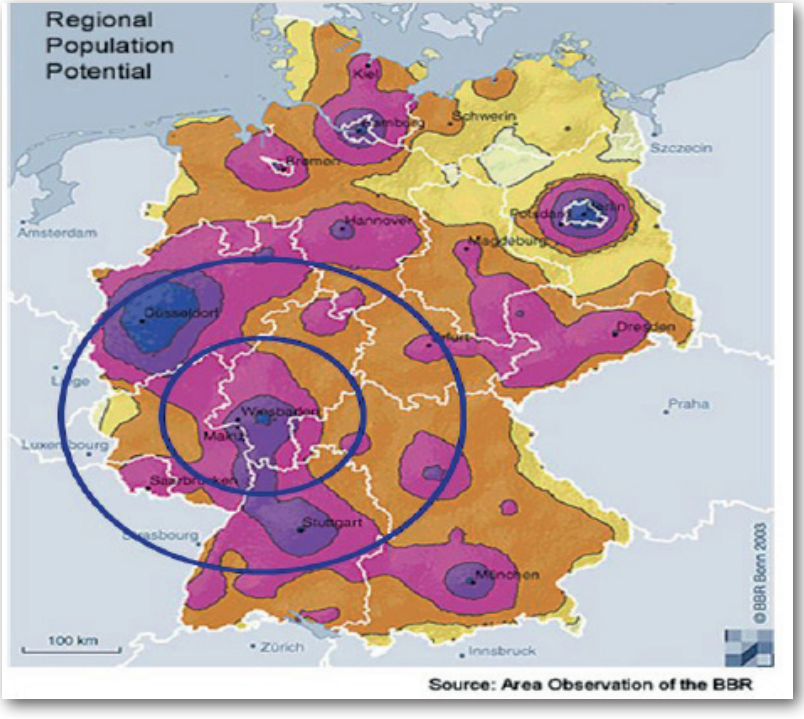
There are two main strategic objectives, with High Speed Traffic (Long distance trains) being the focus.

1. Frankfurt Airport's hub function must be strengthened by developing German Rail as a feeder to the airport. Then, compete (hub-) airports and airline alliances by enhancing Frankfurt Airport's catchment area.

2. If some feeder flights are shifted to train that will in turn enlarge slot capacity, and allow for coveted long-haul flights to take over short-haul slots. In turn, this will develop best practice and reliable services so that Frankfurt Airport will continue to be a world leader in intermodality by ensuring accessibility by developing intermodal services.

3. By shifting traffic to public modes this will contribute to greater environmental protection and reduce carbon emission.

Within a radius of 200 km around the airport, Frankfurt Airport has a larger population potential even than all other European hubs.



Source: Area Observation of the BBR

A Variety of Intermodal Products and Services

- Regional train station with 223 commuter trains per day (2010), which 40 are regional trains. This mode had 3.4 mil. passengers in 2010.

- Rail Air Cargo Station with the Cargo Sprinter from 1996-1999 and an AirCargoExpress/ACE: planned for 2010/11 running to Leipzig.

- AIRail Terminal with common check-in (42 Airlines, handled by Lufthansa and by Fraport AG). There is a standard Minimum Connecting Time of 45 minutes and handles around 11,000 passengers per month.

There is also "The Square" an architecturally aesthetic building with 94.500 m^2 of office space 5.900 m^2 of retail space, and a total floor area of 200.000 m^2. Total rental space 143.000 m^2 and around one billion euros have been invested in it. There is a hotel, doctor's office, day-care centre, a concierge, barber, dry-cleaners, bank, business- and conference centre, supermarket, drugstore, jeweller, and a perfumery.

The Airport's Market Effects on Railway Passengers

When examining market effects, it's important to keep these statistics in mind: 150.000 daily flight passengers use Frankfurt Airport and there are 16.500 available public parking positions. Additionally, there are 23.000 daily train passengers and 72.000 airport employees.

2010 passenger numbers at Frankfurt Airport's Railway Stations include 5.453 million using the high speed rail and 3.386 million using the regional. In total that's 8.839 million a year.

Some Positive Effects on Carbon Emissions

There have been major effects on modal split in shift from car to train. Fraport's analyses show a reduction of CO^2: - 4.800 t per year. In shift from flight to train: reduction of CO^2 : - 80.600 t per year.

On the catchment area of Frankfurt which is the balance between Frankfurt Airport and airports in Germany & neighbouring countries, there has been a reduction of CO^2: - 89.500 t per year.

Future Developments

Fraport AG would like to incorporate future intermodal development in line with the development of the EU's European High Speed Rail Network (TEN-T). The group would also like to see further integration with European Rail Standards which includes: technical, operational, luggage transport, scheduling and ticketing, IT –systems (reservation systems), information systems (GDS), liability, legal framework, service (airlines) etc., feeder function, further substitution of short haul flights, and most importantly, extension of Frankfurt Airport's catchment area.

TO BE REMEMBERED:

As an intermodal hub, Frankfurt Airport's catchment area is enlarged by having German Rail (DB) services to the airport-both regional and high speed. Frankfurt's strategic location gives the airport connectivity in all directions of the German rail network.

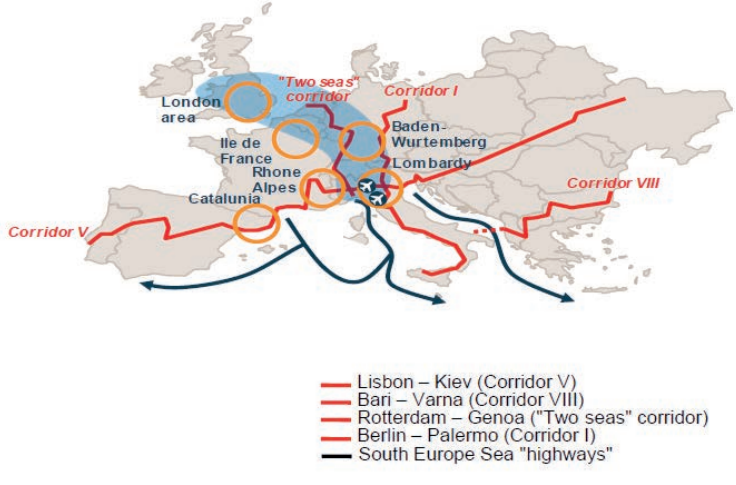
"Incentives to Inter-modality"

Massimo Corradi is TEN-T (Trans European Transport Network) Projects Coordinator for SEA Milan Airports

Key facts concerning Lombardy:

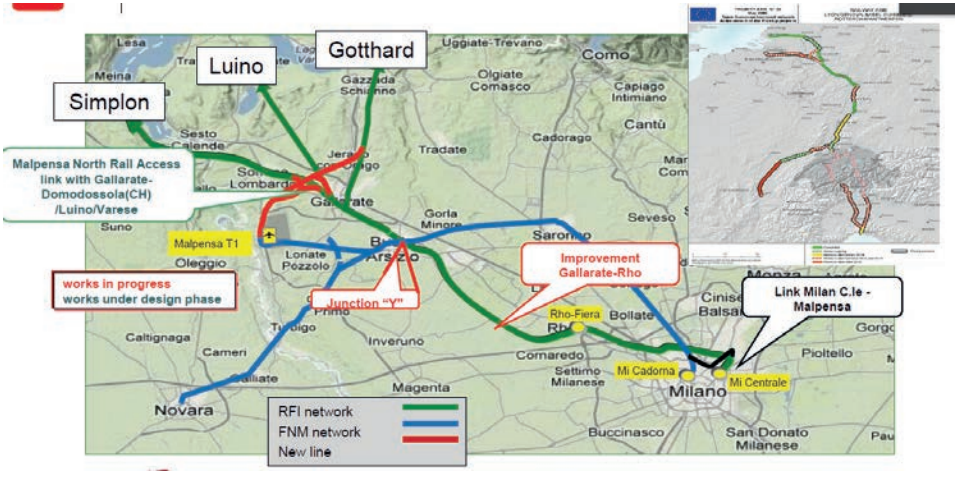
Main indicators	120km	%on Italy	1° step High Speed Rail Florence-Bologna	Others 250-300 Km	TOTAL	%on Italy
Area (km²)	49.324	16,4	7.216	19.607	76.147	25,3
Population	14.025.593	23,4	1.960.838	6.047.104	22.033.535	36,7
No. of companies	1.226.306	23,1	182.663	568.799	1.977.768	37,2
GDP (EUR MM)	450.364	28,8	66.763	186.505	703.632	45,0
Work force	6.170.547	26,4	890.050	2.668.861	9.729.458	41,6
Exports ('000 EUR)	137.513.223	38,3	18.902.357	61.936.311	218.351.891	60,8
Imports ('000 EUR)	149.299.814	42,6	11.128.808	47.576.900	208.005.522	59,4

Lombardy is at the crossroad of main primary European "corridors". Milan and Northern Italy are the business heart of Italy and one of the richest areas in Europe.



It is the third EU 27 region in terms of GDPand per capita GDP, after London and Paris and the first in Italy. It generates, together with the rest of Northern Italy, 5.2% of EU GDP.

The region is also one of the main logistics platform in Europe while being strongly involved by the development of TEN (Trans European Network) multimode links



Mid - long term projects

Malpensa North Rail Access (The Global Project)

PROJECT TIMELINE

2001 Included in the first Government Strategic Infrastructure Program of the State Lawn. 443/01, known as the "Objective Law", specifically in the "Multimodal Padanian Corridor – Malpensa Rail Access"

2003 Included in the Institutional Agreement between the Government and Lombardy Region

2004 Approved by airport operator (SEA Milan Airports) and by ENAC (Italian Civil Aviation Authority)

2005 Preliminary design submitted by RFI (the Italian Rail Network Infrastructure Manager) was approved by Lombardy Region with limi-

tations (only Phase1 concerning the railway link "Terminal 1 – Terminal 2 ") and was submitted to CIPE (Economical Planning Interministerial Committee) within the Objective Law, but the CIPE approval was postponed until priority phases would be precisely defined.

2007 Phase 1 was given priority within the Infrastructure Network design for the Milan EXPO 2015 site accessibility ("Jointed Works" and "Needed Works").

2008 Pre-feasibility Study conducted by FERROVIENORD (Regional rail manager)

2010 Application for the EU granting (TEN-T Call2010) promoted jointly by FERROVIENORD and SEA, as advocated by Lombardy Region, to co-financing the rail link "T1-T2 "(MXPT2LINK-UP) Final Design , Phase1 of the Global Project.

2011 European Commission Decision C (2011) 944 to finance the corridor

Rail link T1-T2 (MXPT2LINK-UP)

TO BE REMEMBERED:

Careful and long planning result in a successful project.

The development strategy around airport hubs

The story of the planning and creation of the Airport City at Goteborg Landvatter Airport

Ms. Jessica Waller works for the Harryda Municipality in Sweden

Goteborg Landvatter is a very well connected and manageable airport in Sweden, also known as the gateway to West Sweden.

A fast growing region, and a fast growing airport

The region of Goteborg is growing rapidly, both economically and in terms of population, backed by high industrial capacity as well as business presence and science and learning facilities. That makes Landvatter an airport with a high potential of growth and economic benefit for the area. Its catchment area within 40 minutes encompasses a population of 1 million, expected to grow to 1.5 million by 2020. This requires specific planning attention to be paid by the local governments and a high level of cooperation with all the interested parties.

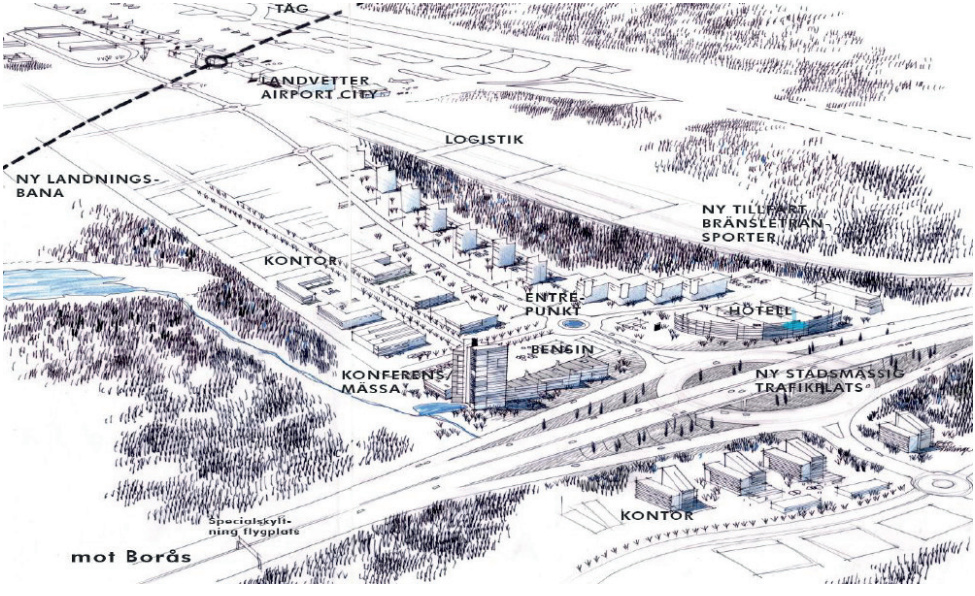
The airport is owned and operated by government-owned Swedavia and is situated 23 kilometres from the city centre, connected by 20 minutes bus rides. Its distance from the city makes noise issues at Landvatter not interfere with the growth, much of the airport being surrounded by farmland and forests, with little residential development in the immediate vicinity.

In 2011 the airport traffic stood at around 5 million passengers, with prospects for increase in 2012. It is the second largest airport in Sweden, after Stockholm Arlanda with over 100 destinations, out of which 75 % are international.

This growth translates into ambitious long term masterplans which include housing, industry and transport

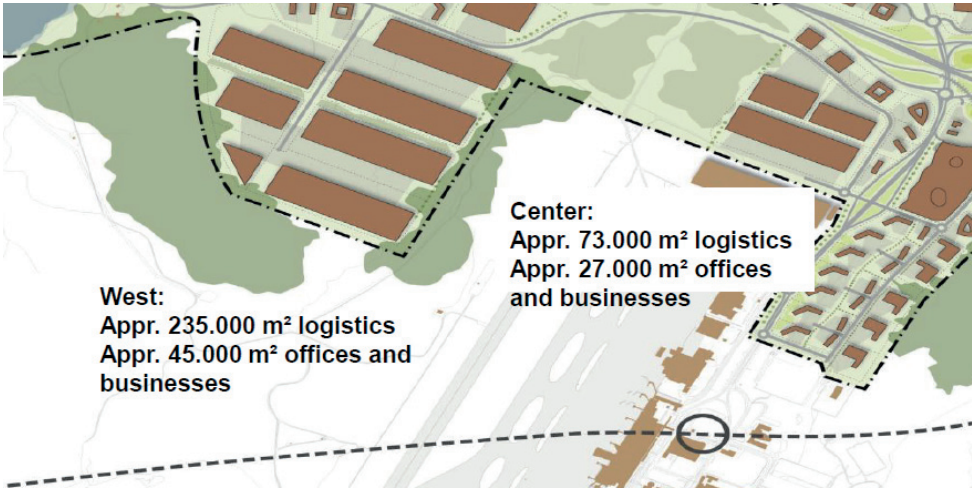
The airport master plan sees it expanding by 2020 considerably, with

new infrastructure projects being already planned. These would include a new train line, a high speed train connection and new road and highway interchanges in the vicinity of the airport. This would make it attractive to business that would potentially settle there, and create an airport city.



Already the airport is involved in a project that would identify its needs over the long term, that is structured into four workshops, and that has a high stakeholder involvement including the National Rail Authority, the Chamber of Commerce and the region itself. The municipality of Harryda is committed to improving and increasing airport accessibility, planning, infrastructure, labour and housing in the area, while the new airport city is already starting to take shape.

The Airport City will be an integral part of the development of the region; the plan is that it will also boost tourism in the area, with dedicated Tourist Information centres at the airport. Other plans include increasing retail space, building a research and development centre as well as a state of the art logistics centre that would increase the cargo capabilities and demand in Landvatter. The entire Airport City project is expected to be completed by 2030.



The regional effects are expected to be positive overall, with decreased CO2 emissions, relief of the traffic system as well as strategic location for logistics, that would not need to travel much in order to ship air freight. Of course, the new Airport City may bring some undesirable effects as well, such as hard regional competition that may see a lot of activity in and out of Landvetter but would also increase CO2 emissions overall.

Today the airport is slowly growing towards completion, with cargo giant DB Schenker already establishing itself a base on the premises.

TO BE REMEMBERED:

The urban growth and spatial planning growth can be anticipated highly in advance, under the condition of phasing carefully the projects. The idea is to have the project ready , and to start building, operations once it is needed.

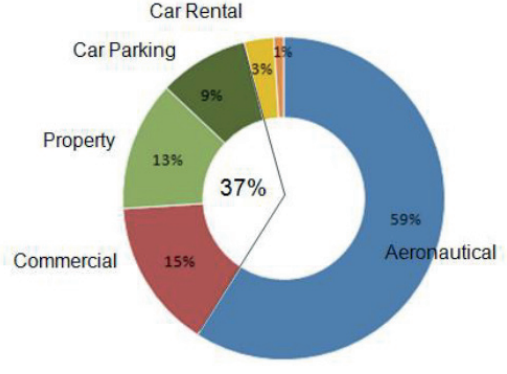
Real Estate needs around airports

Tamás Polster is senior director and head of the airport sector group at DTZ, a provider of real estate services operating worldwide and employing 47.000 people.

Will airports turn into property companies?

One of the initial questions asked was whether airports will turn into property companies, given the constant expansion in terms of business spaces in and around airports. Essentially, especially in a period of crisis and rising fuel prices, the core aeronautical revenues of airports are under pressure, with real estate representing an increasing share of the airport revenues. Also, because of the growth of cities and shortage of land, the airports have to start using to their full advantage the land they already own. In order to cope with these and maximize the revenue potential, airport cities are developing worldwide.

Share of airport revenues by source *



Source: The airport Commercial Revenues 2009 / The Moodies report (Ian Lowden & Justin Lee)

However, there is a tendency for the overstatement of development potential whilst forgetting the fundamental connections between each individual airport and the type of businesses it can support. Thus,

managers have to carefully look at the potential for growth and analyse their particular market and stakeholders and not use the same approach as other airports. Some airports see the potential of turning the airport itself into a destination, by providing entertainment, shopping and catering; however there are limitations to this model based on accessibility. There are different categories of property activities, each responding to different drivers:

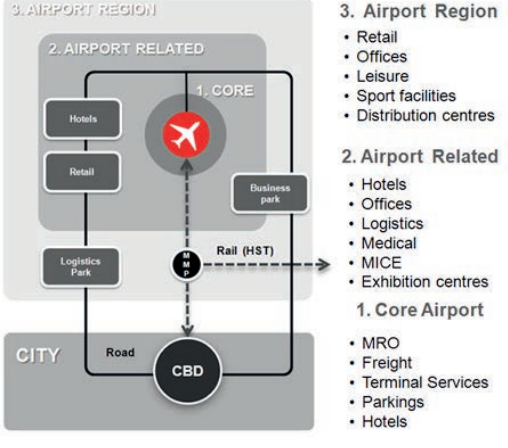
Core airport: activities directly related to the airport core business (handling, maintenance repair and overhaul)

Airport related: activities that are strongly but not exclusively dependent on airport generated activities

Airport region: activities that benefit from the airport wider infrastructure, image or indirect economic impact.

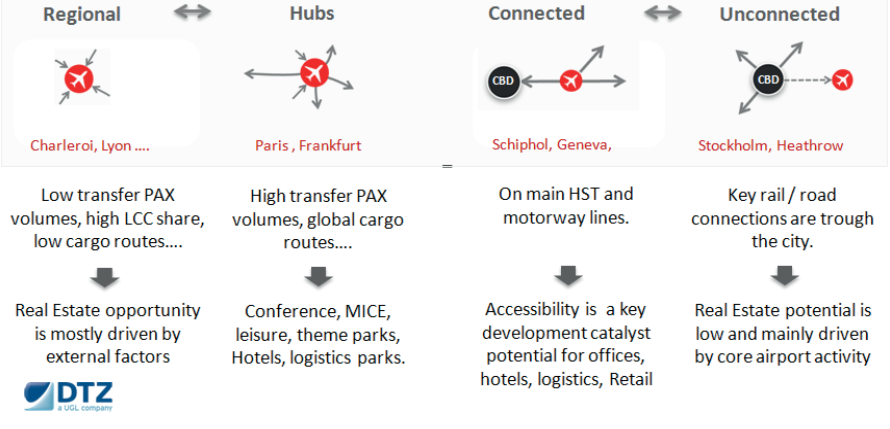
Each airport handles these drivers differently, especially based on the type of region as well as the development and infrastructure already in place. Regional airports, with low transfer volumes, high low cost shares see their real estate opportunities driven by external factors. At the same time, major hubs see their real estate based on conference centres, leisure, theme parks, hotels or logistics centres.

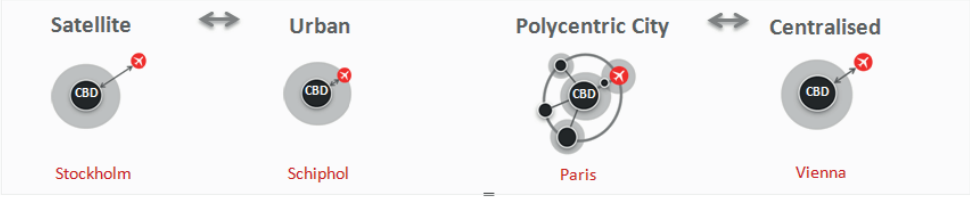
Infrastructures and connections, polycentric and centralized urban shapes



Infrastructure connections play an important role as well, with accessibility being a key for very well connected airports that are situated on high-speed lines and around major highways. The potential for the agglomeration of retail, hotels and logistics is larger. On the other hand, the real estate potential at unconnected airports, where the key connections are in the city rather than the airport, the real estate potential is mainly driven by the core airport activity.

Moreover, the relation between the airport and the city is very important as showcased in the case study below – that sees four types of airports – the satellite (such as Stockholm), where the airport is a satellite to the city and the development potential is related to the connectivity and wider catchment area, The Urban airport (such as Schiphol – where the airport is part of a highly connected urban area and) or the Polycentric City (Paris – airport is one of the many connected sub-centers) – both of these have a strong development potential due to the airport acting as a local sub centre. Lastly, the centralized airport (Vienna – where the city is strongly centralized and the development will be limited at the airport, since it is pushed to continue in the urban zones).





Airport is a satellite to the city.

Development potential will depend on connectivity and wider catchment area.

Airport is part of urban area highly connected.

Airport is one of the many connected sub centres

Airport acts as a local sub centre with strong multifunctional real Estate development potential

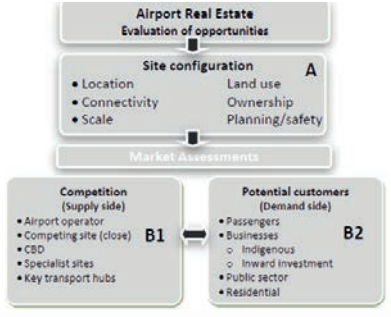
The city is strongly centralised

Development potential will be limited by strong central urban focus.

DTZ a UGL company

The airport and the urban characteristics are equally important drivers

Global hubs and regions	Amsterdam	Frankfurt	Hong Kong	Incheon
	Urban	Polycentric	Polycentric	Urban
	Located within Amsterdam core Urban Area	Part of a hightly connected (S Bahn, EC) conurbation of Frankfurt region	Part of a highly connected economic zone of Shenzen, Macau, Hong Kong	On the edge of a major conurbation of Seoul-Incheon
Total Area (hectares)	2,787	2,000	1,255	5,660
Passenger Traffic (Mio) -2010	45	53	50	28.5
City main train station traffic Mio.	90	130	72	
Cargo Traffic (million metric tonnes)	1.28	1.8	3.35	2.3
Office @ airport	150,000	200,000	72,000	200,000
Total office stock in city	6,000,000	12,000,000	7,000,000	4,000,000
% of total stock	3%	2%	1%	5%
Prime rent @ airport (non terminal)	EUR 400	EUR 360		
Prime rent @ CBD	EUR 350	EUR 400	EUR 1420	EUR 400
Cargo & Logistics / ha	70	125	50	247
Logistics (3rd line)	EUR 65	EUR 70		
Retail	Plaza & Departure > 100 shops	AircityMall, Shopping Plaza, Food Pl	Sky Plaza (30,000sq m)	114 retail shops in IBC
Shopping mall stock in city	227,000	325,000		
Estimated share of revenue / city malls		15-20%		
Hotels # rooms	1,500	2,500	1,725	1,200
Conferencing	Within WTC and Hotels	In FAC 1 and within Hotels	Asia World Expo(70,000 sq m)	Within Hotels
Recreationand Entertainment	Golf / themepark		Golf, cinma, theme park	Golf theme park
Healthcare	Na	Na	Na	15.000 sqm medical centre



The drivers for property development

Source: DTZ

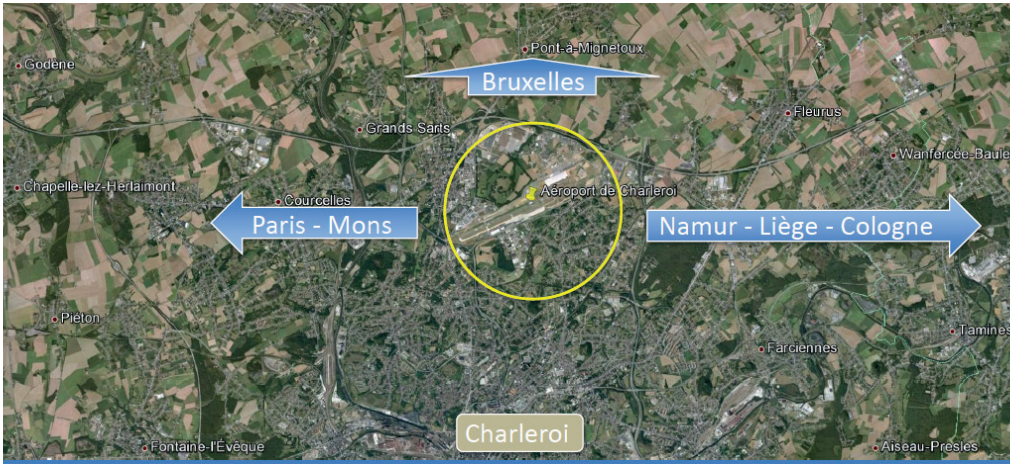
With its extensive global experience, DTZ was able to highlight the risk of applying the so called "aerotropolis" in a European context. . In the US the expansion of an aerotropolis is closely related to land availability, dynamic employment and property markets, large single market, strong reliance on air transportation. The drivers in Asia are hyper specialization and economic clustering, air dependent industries, strong demographic movements, state control over land development. Europe respond to very different demand and urban planning constraints, airports will be key catalyst in urban development but only in very few instances will they be the centres of self contained urban zones.

TO BE REMEMBERED:

There is true significance of real estate in terms of economic development at airports and capturing subsequent revenues will be key to sustain core infrastructure funding. Nevertheless literature tends to overstate potential and apply US land development models that are less applicable to the European context. There is a need to analyse thoroughly prevailing spatial structures as for many European airports it is more their land based connectivity that will drive Real Estate development potential rather than core airport traffic and activities However, each airport is different in terms of what it can bring to businesses and how it is perceived in the long term.

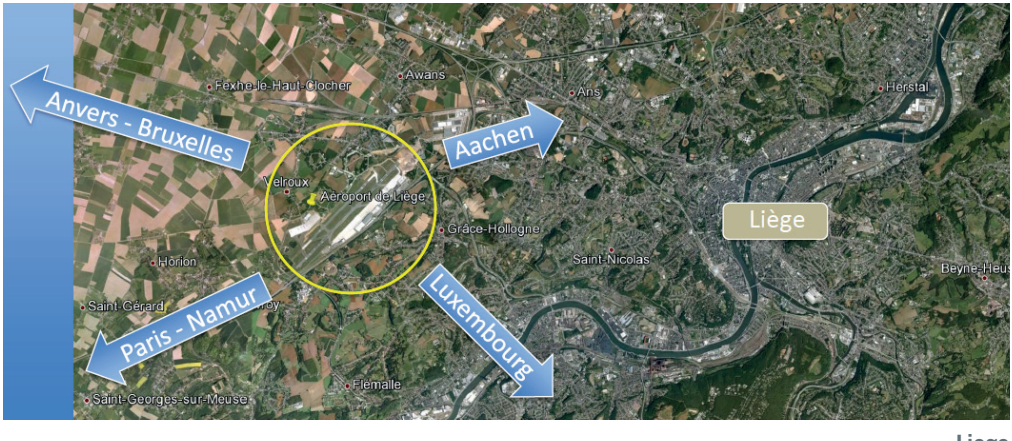
"Allotment of land plots around airports for economic activities"

Luc Vuylsteke - SOWAER



Brussels-Charleroi

It has become evident that the land near airports is good for accommodating economic activities. This is due to location, accessibility, centre of further development, support for residents, control of land, and valuation of assets acquired.



Liege

The Conditions for Success

There needs to be a willingness to develop present: first and foremost political support. For example: when the Regional Development Commission revised Liège area plan in 2003: 470 ha.

There needs to be an overall strategy in place to support airports. An appointment of an airport operator (public): SOWAER. There needs to be an allocation of financial resources made available. There needs to be voluntary mobilisation of policy to support the airport, and finally an Environmental Integration Program (noise) needs to be created.

It also should be mentioned here that no two airports are the same. In the Wallonia case, different measures were taken for Charleroi then for Liege.

Creation of a Master Plan

In the case of Liege airport, first a Master Plan was developed

Master Plan - Development Strategy

It was concluded that numerous collaborations could be taken with the company operating the airport Liege Airport & Liege Airport Business Park, with the development of inter-Liège: SPI, and most importantly with the association of all stakeholders: residents, municipalities, and authorities.

The Wallonia government decided to make a "Marshall Plan." This called for financing of equipment grants / acquisitions □ 12.715 million for the servicing of three priority areas.

Additionally, consultants were appointed to draft pans, create records and economic recognition of expropriation, to charter urban, environmental and energy, plans for measurement / boundary and, design, supervision, monitoring implementation of projects.

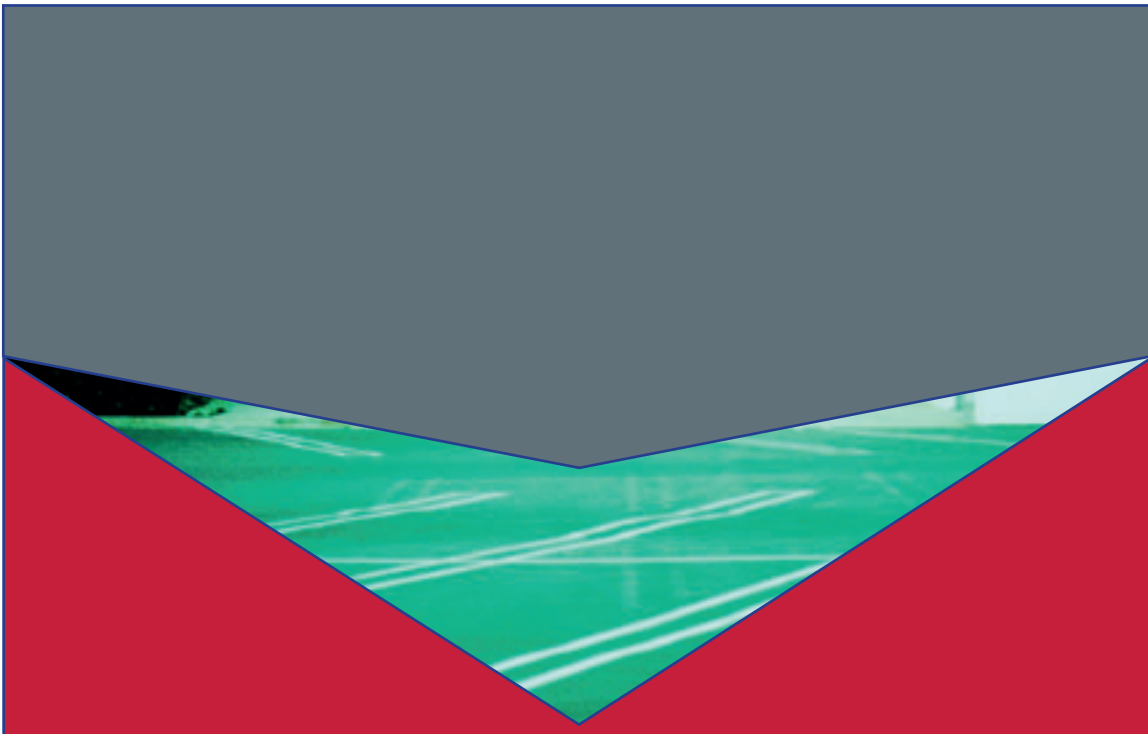
Constraints have also been considered:

- Aeronautical
- Environmental
- Hydraulic
- Soil pollution
- Mobility
- Landscaping

Construction will be completed in early 2014

TO BE REMEMBERED:

Land near airports is good for the development of economic activities mainly due to the location and accessibility of the area around the airport. SOWAER's support of economic activities at Charleroi and Liège airports has been a perfect example of this.



Development and management of business parks

"Role of economic development operator in management of a territory"

By Francoise Lejeune - SPI, Inter-municipal Agency for Economic Development

Roles of an Economic Operator

The role is to become a key player in the service to enterprises, to municipalities, to other public operators, and to citizens.

Proposal for development projects of business parks, office space, assistance to municipalities, support for companies, territorial planning.

Territorial Planning for Economic Development

Regarding territorial planning, first a search of suitable land must be carried out then, appropriation of land (situation plan area, wasteland) where appropriate, procedures to implement, location relative to major communication routes, extension of an existing business park, nuclei near habitat.

When examining a potential economic zone, SPI creates a field area plan, appoints an urban project and technical project study author, finalizes a preliminary draft and file deposit expropriations and zone reconnaissance to the Walloon Region, Public inquiry with the municipality, creates an opinion on claims and any changes and finally seeks approval by the Minister in charge.

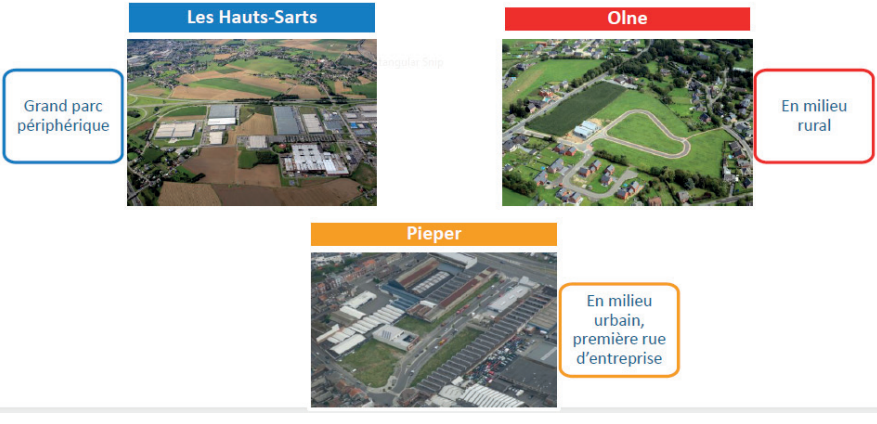
Finally, with permits and job preparation approval and specifications, SPI facilitates filing for building permits and open road public inquiry into the planning permission, agreement on the planning permission and permits for opening roads, files DEPA and trusteeship agreement, and finally awards the work permits and job preparation.

The following analyses were performed prior:

- Studies of soil Impact on mobility, environment, agriculture.
- Modes of water management (storm basins, valleys ...)
- Contact with the Municipal Administrators.

Sustainable Development in Parks

The right company in the right position:



Land Management

- Politique parcimonieuse de vente de terrains (max. 3 fois la surface à bâtir)
- Plus de 25 hectares de terrains rachetés sur les 3 dernières années
- Densification des constructions
- Charte urbanistique
- Problématique ZAEI / ZAEM
- Gestion des reventes
- Gestion du Nimby (riverains, fermiers)
- Friches dans les parcs
- Accessibilité mode doux
- Part communale dans les infrastructures et leur entretien
- Intervention des communes dans la sélection des entreprises

Liege Airport Development Zone:

TO BE REMEMBERED:

Role of an economic development agency is to become a key player in the service to enterprises, to municipalities, to other public operators, and to citizens and it is important that this balances out between all concerned parties.

"Management, galvanizing action and dialogue in a business park"

By Nathalie Czerniatynski - IGRETEC

Role of the Intermunicipal Agency for Economic Development

The agency has a role in:

- Infrastructure Development
- Business Park Activities
- Land
- Buildings: - Offices - Industrial buildings - Laboratories
- Economic Analysis/Animation

Charleroi in 1993:

Charleroi 2012

The Aeropole Office Park Global Strategy

This structure provides complete & integrated supply chain solutions for companies: to attract qualified manpower through research centres and training centres. Facilities need to be environmentally friendly, with pleasant aesthetic architectural design and provide the services for which it was designed.

Several sectors represented in the park including:

1. Life Sciences
2. Aerospace
3. Graphics
4. Business Services
5. Technology Industry

Economic Programs

Informational programs are organized with 165 participants per event and 30 events per year. Communication is provided by newsletter, blog, and social media.

The aim is to make the existence of the facilities known.

Economic Programs II

The Objective is to create local networks of cooperation: to create synergies and partnerships between domain of complementary activities and shared, to relay clusters and collective organizations, and to highlight synergies of local knowledge and success stories.

Additionally, some more development areas are planned as of September 2012.

Future

- 2 new economic parks over 60 ha
- Labs, offices, research centres

TO BE REMEMBERED:

Make the programs known by local stakeholders who could settle there. The area can be developed economically by the agency and or/region and is also somewhat tied to the growth of the airport.

The need to rally the players around the development project

The economic and social cooperation between Lyon Saint Exupéry Airport and its territory

Lionel Lassagne is the Director of Sustainable Development and real estate at Lyon Saint Exupéry Airport in France.

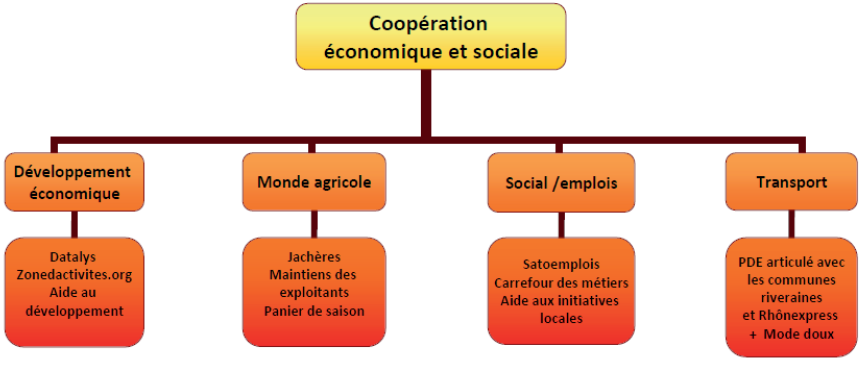
Airport Impact

Saint Exupéry is ranked third in France in terms of passenger numbers, boosting 8.5 million in 2011. The airport is located in a unique development area, allowing it to be able to take various development paths.

It has a capacity of extension of up to 950 hectares and is situated in a complex and vibrant region, with around 250 thousand people living in the vicinity of the airport. The economic and social potential of the airport is also relatively high, with 3500 enterprises in 60 activities areas situated in the catchment of the airport, employing over 100.000 people.

The economic impact of the airport is substantial at the moment, according to some numbers provided by airport officials. Lyon Saint Exupéry is an essential development influence in the Rhone-Alps region, contributing to the economy with approximately 2.6 billion euros. In the airport itself there are 200 companies operating which employ over 5.000 people and in a 15 minute catchment area there are 1200 other enterprises.

Les axes de la coopération économique et sociale avec le territoire



The airport is committed to economic and social cooperation with everything that surrounds it as well as all the factors that can influence it or that are influenced by it. The objectives of the airport are enhancing the region's assets and attract new investors and developers and capitalize the attractiveness of the Lyon-Saint Exupéry and allow nearby communities to benefit from new projects.

Cooperation with the agriculture world

In terms of cooperation with the agriculture world around the airport, Saint Exupery Airport has been very active lately and is one of the pioneers in the management of relationships with the nearby land owners. The airport has supported the agricultural projects of its neighbours and has strived not to affect the biodiversity of the area, through various actions such as selling the agricultural products from the neighbouring fields directly to airport companies. Also, the airport has been maintaining the land that it has bought around the airport

Social and employment

Through a project called Satoemplois the airport has been giving access to employment to people living nearby the airport. Thus, at the airport there are 147 employed residents of the area out of the 408 jobs.

Transport

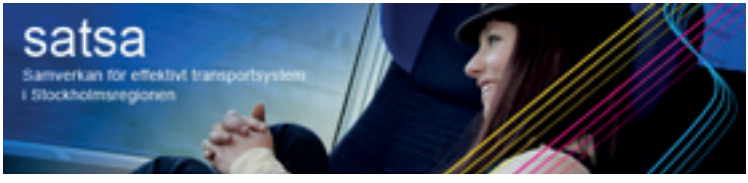
In terms of intermodality in 2010 the airport opened its connection to the Rhonexpress tram line, in 2015 is planning to have a TGV Freight railway station (EuroCarex), with other connectivity projects planned up to 2025

TO BE REMEMBERED

The airport of Lyon Saint Exupéry is a great example of cohabitation with the people living nearby the territory of the field, inclusion into the workforce as well as development of joint projects. In the long term, by pleasing and working with the neighbours, the airport is set to be able to expand, while proving that it is working to also involve the community.

"Territorial marketing: initiatives of the City of Stockholm in order to improve the connectivity to the city territory"

David Schubert is the Project Manager County Administrative Board of Stockholm, Sweden. At Genval he talked about the progress that the city of Stockholm has been doing in relation to the connectivity with the rest of the surrounding territory.



Stockholm Arlanda Airport has long been one of the top airports in terms of passenger numbers in the Nordic countries, with larger numbers occurring only at Copenhagen Kastruup and Oslo Gardermoen. In terms of international passengers the airport is second only to Copenhagen, surpassing Oslo.

SATSA

The city is involved in a project called SATSA II, which aims to strengthen and improve international routes to the region in order to promote the region's long-term economic, social and cultural development. The city is looking at being North Europe's most attractive metropolitan region for employment and residence as well as tourism and business investment. In order for this vision to be accomplished, international air routes to the region must increase.

The Stakeholders in this project are the County Administrative Board of Stockholm, County Council, SL – Stockholm Public Transportation, Stockholm Business Region (SBR), Uppsala Regional Council, Swedish Agency for Economic and Regional Growth, Invest in Sweden, County of Sigtuna, The Swedish Transport Administration, European Union and Swedavia.

Route Development

Amongst the activities that would be involved in the project are increasing knowledge of the aviation market and the drivers of route development and close collaboration with key strategic stakeholders within and outside the region.

Stockholm Arlanda benefits from a growing economy and population, and airport with a good capacity of growth that is also a strong domestic hub, however has a limited catchment area. The Scandinavian Airlines (SAS) base is in Copenhagen which is not very far from Stockholm. Public transportation to and from the airport is still a problem, with limited connections to southwest and northwest Stockholm.

However, there are plenty of opportunities that could be used, amongst which an increased number of airlines is choosing Stockholm Arlanda as a hub. The threats to the current plan of expansion mainly revolve around an uncertain future for SAS, that is still one of the major players on the market in the area and the possibility of public transport projects being delayed.

The major stakeholders in the route development project include state owned Swedavia, that owns and operates 11 airports in Sweden, Stockholm Visitors Board, Visit Sweden.

Stockholm Access

Stockholm Access is a joint project between Swedavia, Stockholm Visitors Board (SVB), Visit Sweden and Stockholm Business Region (SBR) that aims to promote more direct routes to the Stockholm region. Swedavia is in charge of passenger development, Visit Sweden and SVB are taking care of tourism development and SBR is working on foreign direct investments.

Its objectives are to increase the Stockholm region market exchange in terms of traffic and passenger development, tourism development and foreign startups. The project is aiming to combine the power of accessibility of the region with good offers from destinations, creating thus the possibility for development for airlines.

The future for the airport region relates to expansion. Arlanda and its partners are analyzing future destinations and markets of importance for the Stockholm area and developing a strategy for increasing the accessibility in the area.

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