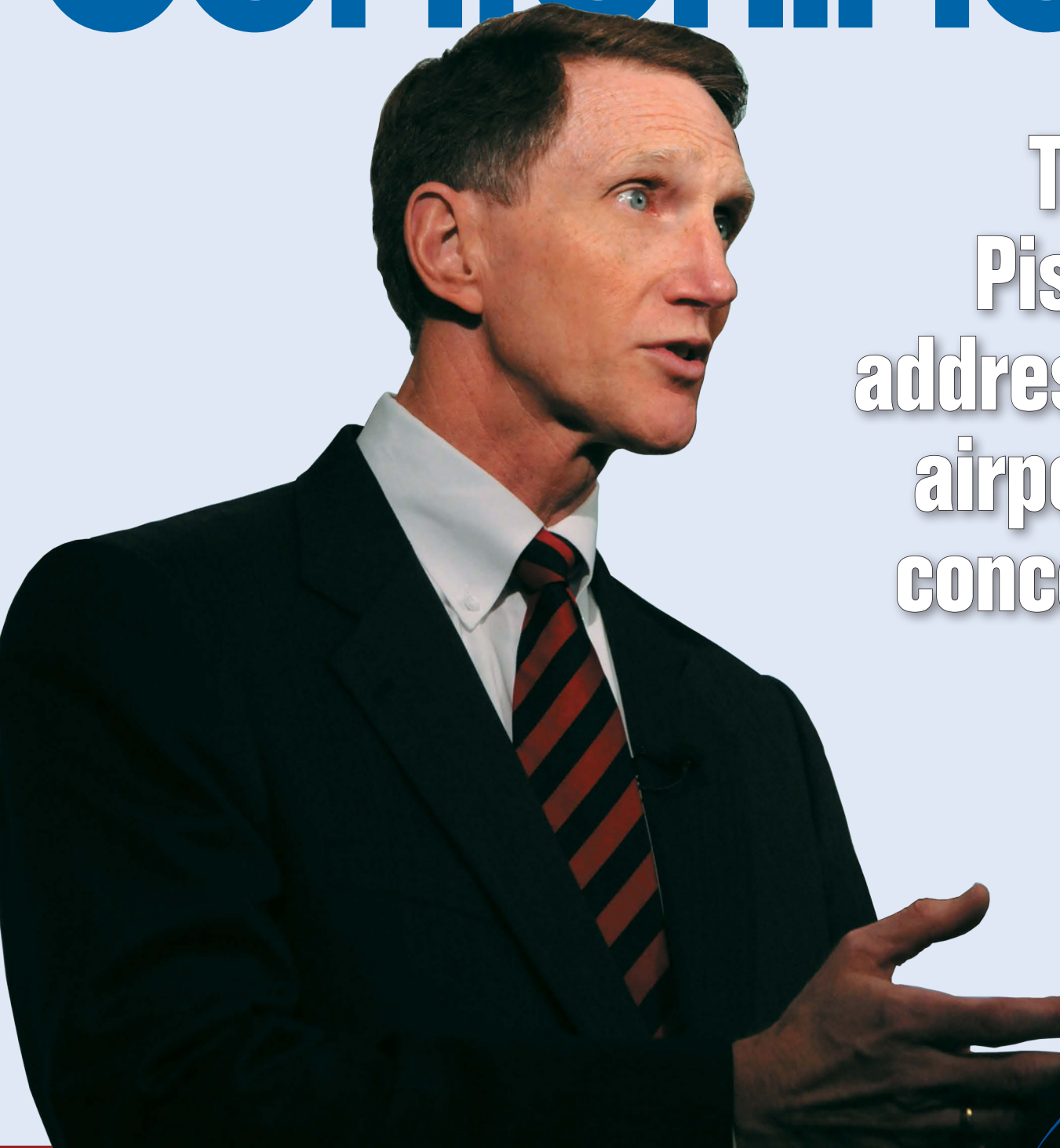


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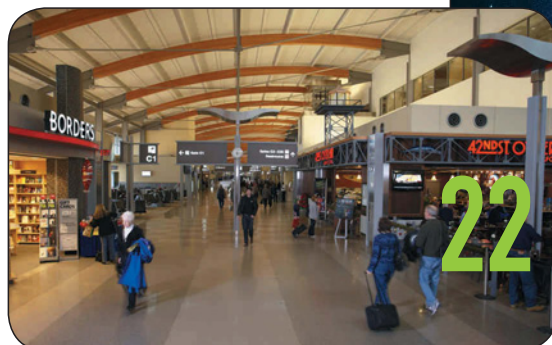
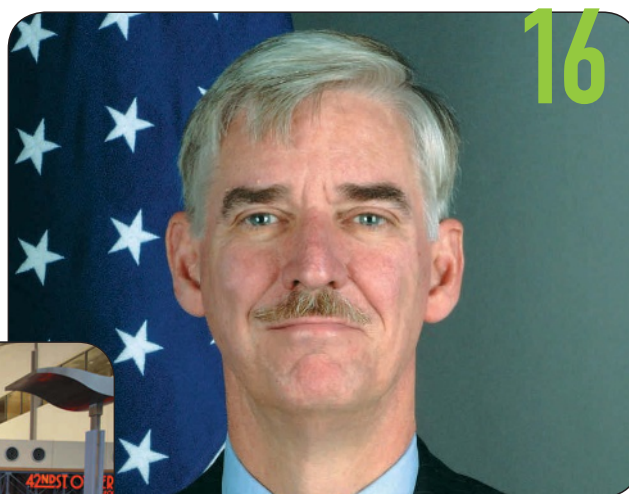
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Our Focus: Local Control and More Funding Options for Airports



IN THE NEARLY six years I have been at ACI-NA, enhancing airport proprietor rights, increasing the PFC and strengthening AIP have been our priorities. ACI-NA's legislative staff educated Congress on airport finances and the AMT, our economic department gathered and analyzed data supporting airport capital needs, our policy specialists prepared authoritative white papers making the case and our regulatory experts provided persuasive arguments that additional funds were needed to meet the ever-growing regulatory burden.

We made a lot of progress and achieved important successes, including the AMT waiver for 2009/2010 and a PFC increase in not one, but two, FAA reauthorizations bills passed by the House. However, it was a huge disappointment that Congress did not enact a long-term FAA bill last session due to a labor issue and a fight over slots.

The outlook for increasing airport funding in the 112th Congress is not good. The impact of the November 2010 election on airports was clear when airport organizations met with House Transportation Committee Chairman John Mica's staff about FAA reauthorization. The good news: Mica wants a four-year bill; the bad news was he cannot move a PFC increase and it is possible that AIP could be reduced. We were challenged to think out of the box about potential programs that could provide increased airport financing within very specific parameters. I believe we were given this opportunity because we had made the case that airports needed more funding for safety, security and capacity projects.

We said the best way forward was to allow local communities to determine their funding needs by eliminating restrictions on the PFC (airport proprietor rights); this was rejected. Our proposal for an administrative mechanism to increase the PFC, similar to other user fees, also was rejected. So we hit the road.

Meetings were held in Dallas, Los Angeles and Washington, D.C., to discuss possible options. It was great to get the perspectives of more than 60 airport directors on this important issue. I spoke with many directors on the phone and at the Washington Legislative Conference. To those who attended our meetings or took my phone call—thank you! ACI-NA is a member-driven organization and we need your views to develop our position.

We also recognize that the industry is strongest when we work together. Under the leadership of Chair Frank Miller, ACI-NA's Executive Committee met with AAAE's Executive Committee in early February to ensure that our legislative priorities were the same.

At press time it does not appear that our suggestion for a new airport funding program will be accepted. However, I am proud that we were not afraid to think out of the box and develop proposals to benefit airports throughout the United States. We remain committed to helping our members obtain the funding for passenger safety and security, and to meet the increasing regulatory burden.

GREG PRINCIPATO
PRESIDENT
ACI-NA



Airports Council International – North America

1775 K Street NW Suite 500
Washington, DC 20006
(202) 293-8500
www.aci-na.org

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Airports: Default Providers of Passenger Care During Irregular Ops



ONCE AGAIN THIS holiday season, irregular operations occurred across much of eastern North America. This demonstrated the important role of airports in the passenger experience under circumstances completely beyond our control—severe winter weather, both at home and in Europe, translated into stymied holiday plans during one of the busiest travel periods of the year.

At Canada's airports, we take our customer service role very seriously, even though we have mostly indirect contact with the traveller. We realize that many different organizations have to work together to make a passenger's journey possible. Air carriers, airports, ground handling organizations, navigation service providers and even taxi cab operators are all cogs in a wheel that makes up the passenger experience.

DURING inclement weather, when things fall apart, people often default to the airport to sort things out.

During inclement weather, when things fall apart, people often default to the airport to sort things out. Since no one ultimately is in charge, when an airport assumes the role of coordinator the leadership is informal. The role of an airport during a winter storm becomes much more than just plowing runways. We ensure that our stakeholder partners are talking to one another and that we're all doing our best to make travel disruptions as painless as possible for the passenger.

Fortunately, the weather trials of the recent holiday season don't happen every day. Whether it's winter storms, technical glitches or terrorist threats, the aviation sector has become accustomed to occasional disruptions that put a damper on travel plans. At airports we assume a leadership role, because at the end of the day we understand that our passengers do not care who or what is responsible for them not getting to their destination—they just care whether they had a good or bad experience at our airport.

WILLIAM RESTALL
CHAIRMAN
CANADIAN AIRPORTS COUNCIL



Airports Council International – North America

1775 K Street NW Suite 500
Washington, DC 20006
(202) 293-8500
www.aci-na.org

ACI-NA Staff

Greg Principato President

Deborah McElroy Executive Vice President,
Policy and External Affairs

Thomas Smith Senior Director,
Digital Communications

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Publisher Jill Andreu

Editor Christine Cusatis

Project Manager Melissa Zawada

Marketing Kent Agramonte

Bookleader Shane Holt

Sales Representatives Brian Agnes, Lou Brandow,
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Vermeulen, Marcus Weston, Chris Zabel

Designer Dan Proudley

Advertising Art Elaine Connell

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E-mail address changes to:

publications@aci-na.org or mail to:

1775 K Street NW Suite 500
Washington, DC 20006

E-mail comments to centerlines@aci-na.org.



Take Charge: Shift an Airport's Parking Strategy into High Gear

ALTHOUGH PARKING

RECEIPTS often represent more than half of non-aeronautical proceeds at North American airports, this important asset is often overlooked as a driver for revenue growth. Airports have the ability to influence parking revenues more than any other income stream during the next few years, including aeronautical revenues.

However, many airport management teams tend not to focus on parking operations because they feel that additional revenue opportunities are limited to rate increases, which airport stakeholders are traditionally reticent to support due to concern over a public backlash. That is a mistake.

Airports that fail to capitalize on their parking assets risk alienating customers, missing revenue opportunities and ceding market share to private operators. A sound parking strategy is built on a clear understanding of the diverse customer segments, market opportunities, and the factors that influence supply and demand.

There is clearly a wide spectrum of airport customers. At a large West Coast hub airport, for example, a study found six discrete consumer profiles. Segment preferences vary across factors including number of annual trips and parking stays, preferences for proximity to terminal access and amenities, and price sensitivity.

For example, “meeters and greeters”—consumers who have quick parking stays while taking friends and family to and from airports—are generally not very price sensitive and strongly prefer terminal parking. Yet despite yielding the highest per-

day parking space revenues, airports regularly underprice this segment. As such, opportunities exist at many airports to raise prices if enough parking spaces are dedicated to meet this group's needs.

Looking more broadly, the study found 20 to 30 percent of terminal parking travelers are willing to pay more for added convenience (this does not include “meeters and greeters”). To identify which consumer parking preferences can provide the highest revenue potential, airport management can model the impact of changes to price, proximity or other variables to parking volumes.

ADDITIONALLY, critical to informing a parking strategy is understanding the annual revenue per consumer in each segment, and the day spaces demanded per person annually.

Additionally, critical to informing a parking strategy is understanding the annual revenue per consumer in each segment, and the day spaces demanded per person annually. Airports can gather a clear picture of demand and how demand patterns vary by consumer segment through a rigorous consumer survey, an in-depth analysis of ticket data and on-site observations.

When examining the addressable parking market, it is important to look beyond an airport's operations and include all parking assets that are considered by passengers, “meeters and greeters,” and airport employees. For example, what is an airport's market share for remote service products? Without this information,

there is a potential blind spot in the parking strategy.

The market inventory process should be further categorized into terminal parking, remote service and economy options. Then, the supply and utilization levels for these “products” are analyzed and can be modeled based on multiple factors to help quantify which new potential product offerings hold the most promise. For example, remote lots can provide an opportunity to reach additional segments by



introducing or expanding regular shuttle services, covered parking amenities, car wash services and luggage assistance.

There is a pronounced opportunity for airports to expand their parking portfolios. Once an airport gains a clear understanding of the market landscape and consumer preferences, it is well-positioned to craft a parking strategy that will unlock new revenue opportunities and provide new services that will begin to foster long-term consumer loyalty.

JAMIL SATCHU
VICE PRESIDENT/GLOBAL AVIATION
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ACI-NA Working to “Green” Our Airports



THE PROACTIVE MEASURES airports across the United States and Canada are taking to reduce their environmental impacts have often gone unnoticed and undocumented. ACI-NA and our member airports are working to change that. We have

spent the last couple years benchmarking, publicizing and encouraging even broader adoption of airport environmental measures.

In 2008, ACI-NA conducted the first-ever comprehensive airport environmental benchmarking survey. The survey aimed to garner data on the types of initiatives airports have undertaken to address the impacts airport activities can have on environmental media such as air, water, noise and climate. Seventy-four airports responded to the survey, providing information the Environmental Affairs Committee could use to identify areas for achievable improvement.

The survey results armed ACI-NA staff with the data needed to tell the story of airports' environmental stewardship to the public, media, policy-makers and regulators. ACI-NA captured this data and a number of case studies in two brochures highlighting the array of actions airports are taking to reduce their environmental footprint: “Going Green: Reducing Aviation’s Environmental Footprint at Airports” and “Going Greener: Minimizing Airport Environmental Impacts.”

Based on the benchmarking results, in February 2009, the ACI-NA Board of Directors adopted a slate of ambitious yet attainable

environmental goals intended to encourage airports to undertake a range of environmental initiatives. Since that time, ACI-NA staff and our Environmental Affairs Committee have focused on assisting airports with implementing these goals through measures such as information sharing, training, research and potential policy changes.

New data from an updated ACI-NA environmental benchmarking survey conducted last year shows the advancement airports have achieved. Admittedly, the progress thus far is mixed, and the results may not be representative of our entire airport membership’s environmental accomplishments. However, in a number of areas, the survey indicates that airports are well on track to meet the identified goals. In other areas, more work is needed.

To assist in sharing information between airports, ACI-NA has established a password-protected environmental resource center. Here, airports can provide data, examples and lessons learned for use by other airports as they look to embark on environmental initiatives already under way by their industry colleagues. ACI-NA continues to populate the resource center, focusing on near-term priority goals.

As an example, one goal encouraged our member airports to adopt an environmental or sustainability policy statement. More than 70 percent of the airports responding to the 2010 survey had adopted such a policy. Many of those policies are now available in the environmental resource center. Airports still looking to meet this goal can now use those existing policies

as examples in framing up their own policy.

The board also set a goal for all of our airports to have a basic recycling program in place in 2011, with half of those airports aiming to operate more extensive programs. Ninety-seven percent of the responding airports indicated they have some program to reduce, reuse and recycle waste materials. To help airports go further, we will be concentrating on training and information sharing between airports. An Airport Cooperative Research Program project that is now underway will provide additional guidance on coordinating recycling programs with airlines.

In contrast, only one-fourth of responding airports indicated that they have an incentive program to encourage the use of low emission access vehicles by taxi, shuttle, limo and rental car companies. Our goal is for all airports to undertake such a program. Through gathering example policies, procedures and lease language, and providing lessons learned on working with industry partners, we hope to provide additional airports with the resources they need to meet this goal.

Over the last couple years, we have found that airports are undertaking proactive, innovative initiatives to reduce their environmental footprints. Through ACI-NA’s environmental goals and other airport programs, they have pledged to do even more. This commitment to the environment is worth noticing.

JESSICA STEINHILBER
SENIOR DIRECTOR,
ENVIRONMENTAL AFFAIRS
ACI-NA



On Feb. 2, the ACI-NA presented Senate Majority Leader Harry Reid (D-Nev.) with the 2011 Commissioners Award for Legislative Leadership. The presentation was made in Reid's office. The delegation (from left to right) included Dean Schultz, Reno-Tahoe International Airport; Greg Principato, ACI-NA; Jim Trout, Kalispell and chair of the Commissioners Committee; Krys Bart, Reno-Tahoe International Airport; Senator Reid; Rosemary Vassiliadis, Las Vegas McCarran International Airport; Paul Eubanks, ACI-NA; and Charles Lombardo, Burbank Bob Hope Airport.



Jim Trout, chair of the ACI-NA Commissioners Committee and a board member of the Glacier Park International Airport governing board, presented the 2011 Commissioners Award for Legislative Leadership to Senate Majority Leader Harry Reid (D-Nev.) on Feb. 2 in Reid's Washington office. The presentation was a prelude to the annual Commissioners Congressional Reception later that evening.

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NEXTGEN ON GROUND VEHICLES

Can it be used safely and efficiently?

BY KATHRYN CREEDY

NextGen begins and ends at airports—and one of the most important contributions the new technology will have is to improve airfield safety.

Several U.S. airports are exploring the use of a cornerstone of NextGen technology—automated dependent surveillance-broadcast (ADS-B) to track ground vehicles and enhance airfield safety. ADS-B relies on GPS and radio communications to track ground vehicles in airside operations and communicate this tracking information to airport operations centers, FAA air traffic controllers, and—in the future—to the cockpit.

While the move is widely hailed as safety improvement, there is much that makes airports nervous, such as making the investment case and whether or not it can be used for safety and efficiently. Much depends on the manufacturer and whether the ultimate product has such a narrow use that it restricts the market, which would, of course, increase costs.

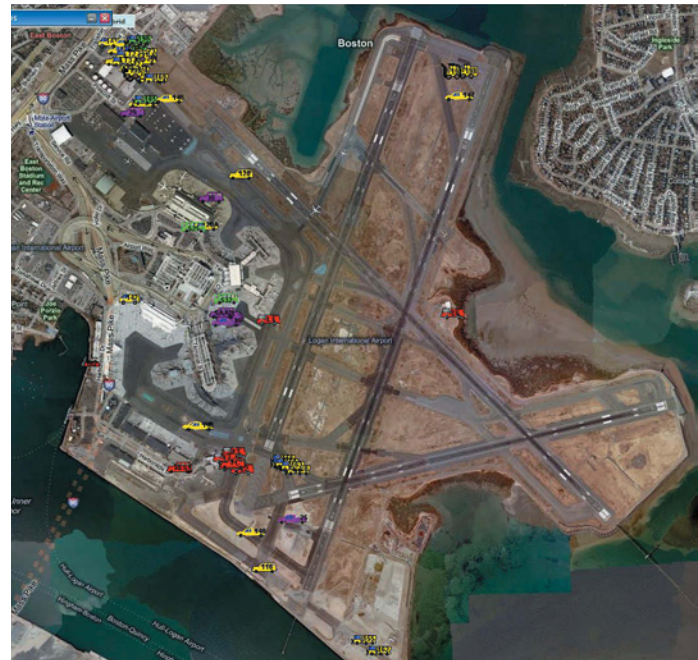
There are several debates swirling around the deployment of the FAA-proposed system. According to Christopher Oswald, ACI-NA vice president of safety and technical operations, the most important

being whether federal rules governing their use will make the system impractical for airport operators to deploy or vendors to manufacture.

The FAA, Oswald said, wants to limit ground vehicle tracking with ADS-B to airport movement areas only—generally active runways and taxiways.

“This is a pretty critical safety issue for airports who want to be able to track vehicles operating in non-movement areas like parking aprons and taxi lanes,” he said. “The FAA has not really clearly enumerated what the term ‘movement area’ means in terms of surface movement. From the airport perspective, airport operators want to be able to see what’s going on in non-movement areas, where safety issues are also present.”

Oswald indicated that, while the primary concern is safety—ensuring airport vehicles are not in places they shouldn’t be—airport officials are also interested in figuring out where vehicles are so they can dispatch them for effectively. This is already being done with low-cost surveillance technology that isn’t hooked into the air traffic control system.



Ground vehicles at Boston Logan International Airport equipped with GPS transponders show up as color-coded images on this tracking map.

“Hopefully, some of the issue will be resolved with additional input from airports,” Oswald said.

Massport pilot projects

Many airports, such as Boston Logan International Airport, already have been using off-the-shelf GPS technology to track ground vehicles,



Snow removal equipment at Logan are equipped with GPS transmitters to track location and performance. Photo Credit: Rudy Chiarello, Massport.

for asset management wayfinding and other purposes, said Flavio Leo, deputy director aviation planning and strategic projects. However, in these cases the tracking information is not rebroadcast back to the air traffic control system for use by ATC or pilots. AS-B would enable these rebroadcasts for shared situational awareness in the tower, vehicles and aircraft. However, it will require the use of ADS-B equipment that the FAA has yet to development the specifications.

“The GPS transmitter is physically installed and integrated with the software logic the vendor maintains,” Leo said of equipment now used at Boston Logan. “We get a lot more information including speed, location, whether a plow is operational and how many miles have been driven.”

Massport’s goal, Leo said, is to use the coming ADS-B platform for tracking airport vehicles. As part of the pilot program, the FAA vendors are already at Logan installing the transmitters/antennas and enhancing the ASDE-X radar to make Logan ADS-B ready. The ADS-B platform will allow integration of information from vehicles with information coming from the cockpit, Leo said. The FAA is expected to complete its work this year with the goal of having working ADS-B-capable transponders at Logan

completely in place for the 2011/2012 winter season. He expects to have a critical number of airport vehicles equipped for a true test.

“Right now the way it works is ground surveillance radar picks up the aircraft’s transponder signal but the vehicle has no such transponder now and is basically a raw radar target,” Leo said. “The goal is for vehicles to have a transponder like an aircraft and we are undertaking that effort. It’s a critical improvement at Boston Logan. We’ve been chosen as a key site for testing the transponders. The trick is to ensure that everything at the airport is integrated properly.”

That is where the challenge is, since operational specifications are only now being developed, a key precursor to vendor development.

“Airports would then purchase—hopefully with the assistance of federal Airport Improvement Program funding—transponders for installation on vehicles. The signals would be integrated into the safety logic of ASDE-X,” Leo said.

Much is in the hands of the FAA, according to Leo, who said the greatest concern for airports is that whatever develops to be a cost-effective solution.

“Adding a transponder on the vehicle and integrating it with NextGen in the ASDE-X radar digital world is the first step and a natural

progression,” he said. “This building block will meet the immediate air traffic control needs while the second block is to enhance the application so it can be integrated into aircraft cockpit. The next step will be having the vehicle operator see what the tower and the cockpit are seeing.”

GPS, multilateration, ADS-B

The Port Authority of New York and New Jersey is using both GPS and multilateration at its airports, said Tom Bock, general manager operational enhancements.

“In order to achieve situational awareness, all known aircraft and vehicles must be displayed to allow ground controllers, and ground managers to know where the traffic is to make more informed decisions,” Bock said. “The location information must be paired with the specific aircraft ID to ensure safety and allow for decision support tools for gate management, fix balancing and delay reduction.

“We use GPS for a variety of airport safety programs,” Bock said. “It has been used in the development of a Ground Based Augmentation System (GBAS) approach system for Newark Liberty Airport, for both ground vehicles and aircraft. Still in development, this year will see its first commercial application.”

Two other prototype systems are being tested at Port Authority airports, including use of GPS signals for data collection aimed at measuring the effectiveness of wildlife management efforts. The signal is used as a reference point for wildlife observations and to log areas where mitigation measures have been used to reduce potential hazards.

In addition, the Port Authority uses a second system—combining GPS and a tablet PC in graphical interface for accurate aerial photos, light fixture identification and AutoCAD data.

“The system allows airport operations and maintenance staff to trade information on specific light fixtures located on the airfield and will create a central database

maintained by the chief of airfield operations that can be transferred and shared by our maintenance staff,” Bock said. “In addition, it will have the ability to capture and transmit digital photos of any key aspects of the inspection process, and accurately identify the location of the photo on a digital map.”

The object of the three systems is to save money by reducing the time it takes to track down airfield problems.

“The GPS units will quickly identify locations and pass that information on to other staff that need to act upon the information provided, such as operations to wildlife staff, wildlife staff to maintenance and operations to maintenance,” Bock said.

“It will also allow us to determine the effectiveness of certain wildlife control measures or maintenance measures and allow us to specifically track individual light fixtures and wildlife locations on the field. In an area many miles from end-to-end and side-to-side, quickly being able to dispatch and resolve problems not only saves time, but fuel burned in getting from location to location.”

GBAS is a key NextGen technology but the authority also uses multilateration systems and GPS location identifiers for asset management of vehicles.

“The multilateration system at John F. Kennedy International Airport is tied directly to the FAA ASDE-X system, allowing controllers to determine vehicle positions on the movement areas even without GPS or transponders,” he said. “This adds a significant level of safety. Our multilateration system also drives the key components of our ground management system at JFK, which is the first of its kind in the U.S. We actually manage the flow of aircraft from the ramps to the runway to prevent long waits of taxiing aircraft and reduce passenger wait times. Ground management is also an element of NextGen that we are delivering now.”

Bock thinks ADS-B or multilateration will give similar results, although the latter does not require aircraft equipage. “The disadvantage of multilateration is it does not give the pilot a reference in the cockpit, but I think that might be achievable with simple GPS like a car GPS for a lot less money,” he said.

FAA requirements

The FAA is looking for a compact device that can be fitted to an airport vehicle dashboard with a GPS feed to it that would have a moving map display showing the vehicle and its position, said Dr. Pradip Som from the FAA’s safety office.

“All we are really asking the manufacturers is to develop a system to improve the vehicle operator’s situational awareness, not for navigation purposes,” Som said. “However, it would have to keep vehicles from inadvertently wandering into the wrong area and coming into conflict with an aircraft, especially in low-visibility conditions.”

Currently, the FAA is in the process of writing the operations specifications for the proposed equipment, which can then be used to develop the hardware and software. “This is called bridging technology,” said Som. “NextGen won’t come until 2020 and this will take us from here to there. It is the next level technology to bridge the gap. We may use a different solution later but this is the next step.”

Som was careful to say the costs will depend on the companies and

the minimum requirements for the new instruments. He also explained there were two kinds of solutions available in the market with the other being more expensive involving a small PC in every vehicle and the development of a local area network.

“ASD-B is a nifty solution where every vehicle has a transmitter so they can see and talk to each other but that will require ADS-B in and out and only out is required by 2020,” he said. “ADS-B in is not mandated yet. If we have to wait for that, it will take much longer. The second problem with ADS-B is covering not only the whole radar area but also areas not covered by radar. Some airports will have ADS-B zone coverage while others may have only partial radar coverage or none at all. We also needed a localized solution and that is bridging technology.”

Remaining questions

FAA Director of Airport Safety and Standards Michael O’Donnell is already working on those low-cost solutions. Indeed, he said he is sensitive that the FAA cannot develop a single piece of equipment or single standards because airports differ so greatly.

FAA has proposed imposing a cap—200 transponders for ground vehicles at an airport—to limit potential interference with aircraft ADS-B system as well as the aircraft-based Threat Collision Avoidance Systems.

“We heard airports loud and clear,” he told *Centerlines*. “There are already a couple of things we are doing to

WHAT IS ACI-NA DOING?

- ACI-NA participated in an FAA Industry Day in December 2010 to discuss ADS-B use in ground vehicles.
- ACI-NA provides the FAA with critical industry expertise and data, making sure that airport issues are represented on the NextGen Advisory Committee,

FAA’s Runway Safety Council, Commercial Aviation Safety Team, Research and Advisory Committee and numerous advisory councils.

- ACI-NA continues to work tirelessly to ensure that FAA, DOT, the airlines and the media understand that *NextGen Begins and Ends at Airports* as it participates in technical planning and implementation committees.

help develop low-cost solutions that are not as broad as the ADS-B effort. We are looking at developing a way to use regular automotive GPS devices by airports and we will be issuing guidance in the spring. What we are looking for is the ability to provide the operator with situational awareness. This would be a receive-only unit."

He explained that there are now three levels of surveillance, the broadest being the airport radar base from which ADS-B will work and that covers the 44 largest airports that have ground surveillance radar already installed. A second level is for airports limited ground surveillance radar. Finally, for the smallest airports, there would be the solution based on automotive-based units adapted with specialize airport maps and provides verbal and audio alerts.

"There are many, new technologies out there and some provide a simple, low-cost solution," he said. "Costs that have been thrown around are about \$1,200 but that depends on the manufacturer but with the specialized airport function it is not that unaffordable either. This is a great alternative that doesn't give ADS-B in and out but will provide very important capabilities."

A third limitation could restrict the airport operators' ability to move ADS-B transponders from vehicle-to-vehicle as operational and safety demands might require. The varying restrictions—hard-wiring to each vehicle and filtering—have made some manufacturers leery of the market for these transponders, Oswald said.

Mediating the conflicts

This is where ACI-NA comes in, according to Leo. He views ACI-NA as a critical piece of the development puzzle.

"We are just one airport out of an entire system of airports," he said. "ACI-NA's role is to make sure that what may be right for one airport and may not be right for another is considered. It is so important to have a larger view to help find solutions

that will work anywhere and that may mean different solutions for different airports. We need to make sure that any long-term applications reflect this larger view."

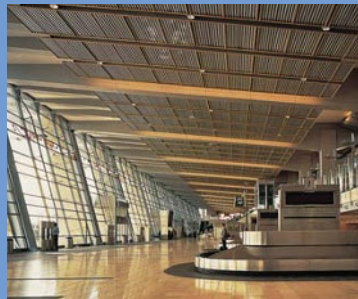
FAA's Som agrees. "Airports Council International-North America is a big part of the endeavor and has been active since before the Runway Safety Call to Action in 2007," he said. "They participate in the Runway Safety Council which meets every

two months so industry and FAA can assess the program progress. It has been very supportive of our root-cause analysis of runway incursions and excursions. ACI-NA not only participates but contributes providing very good insight to the FAA."

The good news is that it is so early in the program there is time for industry stakeholders to come together to create something that works for everyone. ■

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AIRPORTS PLAY KEY ROLE IN GLOBALIZATION

BY KATHRYN B. CREEDY



John Byerly, who retired in October after 10 years as Deputy Assistant Secretary, Transportation Affairs, said ACI-NA has been a consistent and effective advocate for Open Skies.

There is no question that open skies brought enormous benefits worldwide. Even so, much of international aviation, especially in Russia, China and South Africa, is still governed by restrictive rules that rob the very people they are trying to protect of the incredible benefits of liberalization.

Studies show that thousands of jobs are created from the indirect benefits of liberal air transportation regimes. One study concluded that while the advent of American airline deregulation was the clear catalyst, it has been American communities and airports that have been the most active in pursuing new service and in evaluating the economic impacts of aviation. As a result, the United States' push for open skies has become part of the DNA of successful international aviation regimes.

John Byerly, who retired last October after 10 years as the State Department's key aviation negotiator, knows the impact of airports on U.S. policy. Byerly singled out ACI-NA Senior Advisor, International Affairs, Diane Peterson, among others, during his farewell speech to the International Aviation Club in Washington recently, for her contributions to open skies.

"ACI-NA has been a strong, consistent and effective advocate for Open Skies," he later told *Centerlines*. "Diane Peterson has participated regularly as a member of the U.S. negotiating delegations, where her broad experience and nuanced judgment were and are deeply valued by senior government negotiators, including me."

As U.S. counterparts, Canadian airports also are broadly supportive of liberalization, said Canadian Airport Council spokesperson Daniel-Robert Gooch. Gooch indicated the support generally extended to key markets that represent areas of potential growth in air services.

"There has been significant progress in liberalization with important markets for trade and tourism in recent years, including a historic agreement with the European Union, Open Skies with the U.S. and South Korea and new, expanded agreements with markets such as Cuba, China, India, Japan, Jordan, Mexico, Morocco, Philippines and Singapore," Gooch said. "Canada also has Open Skies with Barbados, Costa Rica, the Dominican Republic, El Salvador, Iceland (after 2013), Ireland, Jamaica, New Zealand, Switzerland and Trinidad and Tobago. In addition, first-time air service agreements have been reached with Croatia, Ethiopia, Kuwait, Panama, Qatar, Serbia, South Africa, Tunisia and Turkey, allowing scheduled air service between Canada and these countries."

The carrot

Byerly's comments were echoed by the Department of Transportation Office of International Aviation Director Paul Gretch, who said airports play a key role in developing U.S. policy. "ACI-NA has always played a major role because they participate in all the negotiations," he said. "ACI-NA has always supported the expansion of liberalization. That was particularly important in the early days because carriers were not all on the same wavelength in supporting open skies. ACI-NA has pressed us for Seventh Freedom passenger rights, which is very important."

While much has been accomplished through open skies, last year's second-stage deal between the U.S. and European Union highlighted what remains to be done, cracking the hardest nut of all—foreign ownership of carriers.

Seventh Freedom rights, the rights of a carrier to carry traffic between two foreign countries without touching its home country, have been proposed as the carrot to get at the holy grail of international aviation—cross-border ownership of carriers.

"The second-stage agreement contains some incentives for the United States to permit EU nationals to own and control U.S. carriers, such as an expansion of Seventh Freedom cargo rights for U.S. carriers so as to encompass flights between all (not just some, as at present) EU

member states and third countries," Byerly said. "Other incentives include Seventh Freedom passenger rights for U.S. carriers between the EU and five countries outside the EU and a waiver by the EU and its member states of the 'nationality clause' in respect of effective control by U.S. nationals of airlines of certain third countries."

Changing ownership laws has been a longtime stumbling block. Byerly said the U.S. needs to begin the conversation to overturn the restriction that sets aviation apart from industries such as banking and automotive.

"A meaningful, respectful and future-oriented conversation should begin not with a focus on the political difficulty of changing the existing restrictions, but instead with a fundamental question," Byerly said, "Does a permanent and exception-less ban on all foreign control of every U.S. air carrier posture our country's airlines, their dedicated employees, and the airports and communities they serve for long-term success as part of a global economy?"

"If the answer is 'no' or even just 'maybe not,' the discussion should focus on finding solutions to the well-rehearsed list of concerns, including the protection of our national security, the need to assure reciprocal investment opportunities for U.S. citizens, the preservation of traffic rights in foreign markets governed by the traditional 'nationality clause,'

WEBLINK

- The current list of U.S. Open Skies partners is available on the State Department website: <http://www.state.gov/e/eeb/rls/othr/ata/114805.htm>

and the understandable concerns of airline workers that statutory change could unfairly tilt the balance in labor-management relations, given the fractured state of international labor law."

Despite the fact that the Pentagon is on board with eliminating foreign ownership rules, Congress has been going in the opposite direction, Gretch said. It is highly unlikely that congressional committees overseeing aviation will lift their opposition to foreign control without the work suggested by Byerly.

"A lot of this push is ideological," Gretch said. "If the law changes tomorrow, how much will result from European carriers buying U.S. carriers or vice versa is really a question."

The trend is already well along in Europe. British Airways, the Association of European Airlines and ACI-Europe expressed disappointment over the failure on foreign ownership in the second-stage round. European airlines such as British Airways and Lufthansa have been building airline empires throughout Europe and want to extend that into the U.S.

Lufthansa Director, Alliances, Florian Dehne discussed Lufthansa's strategy in acquiring Swiss, Austrian, bmi and Brussels airlines, saying that it is in the company's best interest to keep the airlines it acquires local, including their local identity, culture and people. Still, a lot depends on the evolution of those carriers over time as to whether they remain local, which could offer the industry the ammunition it needs to overcome current objections.

Foreign ownership is ultimately the next logical step in aviation globalization. Still, airlines continue

WHAT is ACI-NA DOING?

- ACI-NA's U.S. International Air Service Program participates in the development of U.S. international aviation policy and U.S. Government positions for specific negotiations
- ACI-NA participates as the airport representative on the U.S. delegation in Open Skies and other negotiations and keeps U.S. airports informed of ongoing developments.
- The program sponsors an annual International Aviation Issues Seminar to update members on pending developments in the international arena and facilitation issues.

to have a tough time convincing Congress to treat the industry as it does other global industries. All this makes ACI-NA's role just that more important. ACI-NA supports the liberalization of the restrictions on U.S. airline ownership and control. Its members represent thousands of constituents who have benefited vastly from increasing liberalization. Marshaling those forces could make the difference, especially in the current political environment.

Byerly sees the completion of the second-stage negotiations with the EU last year as having cleared the decks for this discussion. He said any change should be made because it is the right choice, not because it is a concession to foreign partners.

Clearly, airports see the potential of opening up new city pairs not only for new passenger opportunities, but for indirect economic benefits of opening up new markets. ACI-NA has pushed for opening city pairs deep within countries, as well as the traditional gateways or coastal markets.

The European Commission indicates that the conclusion of the second stage of the U.S.-EU Open Skies Agreement could be worth an estimated €12 billion in economic benefits and up to 80,000 new jobs. It has said in the past that freeing up market access in 12 emerging markets would create more than 2 million jobs, increase gross domestic product and cut average fares by 38 percent.

"Liberalizing only 320 bilateral agreements of the existing thousands would create 24.1 million full-time jobs

and generate an additional \$490 billion in gross domestic product, according to an InterVISTAS-ga2 report. This was the only report to assess the potential of liberalization in markets still hamstrung by restrictive regimes.

Liberalization restructures local economies

But impacts are much larger than originally thought. Perhaps one of the most interesting findings of the InterVISTAS-ga2 report is overturning the assumptions of similar reports that the local economy will remain static after the introduction of new services.

Evidence indicates that new air services can form new capabilities and foster different transactor expectations, according to the report. This would affect the structure of regional economies.

According to the report, "These reactions can literally create new industries in a region and allow the area to compete for economic opportunities throughout the world. A 10 percent increase in the supply of intercontinental flights creates around a 4 percent increase in the number of headquarters of large firms located in the corresponding urban area ... Headquarters of knowledge-intensive sectors are much more influenced by the supply of direct intercontinental flights than are those of non-knowledge-intensive sectors."

ACI-NA's push to include interior airports can be seen in Cincinnati. In 2006, the study pointed to nine foreign-owned companies surrounding the Cincinnati airport as just one example that added 1,470 jobs to the local economy. This has been repeated in the Washington Dulles and Atlanta areas, among others.

The InterVISTAS-ga2 study pointed out that the already-impressive economic impact is actually underestimated since comparisons only extend to year-before and year-after time frames, despite the fact that new service requires years to mature. Even so, international traffic can double in only a year, even in city pairs already on the international route map.

U.S. Open Skies expands

The economic impact of liberalization has led to the U.S. signing of its 101st Open Skies agreement with Brazil.

"We've been extremely successful," DOT's Gretch said. "Most recently, we achieved two biggies: Colombia and Brazil. We are always looking out for other possibilities, although some, including China, Russia and South Africa, are big holdouts. Those are difficult nuts to crack, but we'll keep working on them."

The major sticking point, he added, is always protection of their home markets. Even so, it is only a matter of time before they understand that the benefits far outweigh the costs, despite the transitional risks to local airline business models. As the most recent decade has illustrated, the evolution from old business models to new has already been forced on airlines worldwide. That same evolution is inevitable if a carrier is going to play on the world stage. ■

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PISTOLE MOVING TSA TO A RISK MANAGEMENT APPROACH

BY THOMAS J. SMITH



ACI-NA President Greg Principato interviewed TSA Administrator John Pistole last month in Pistole's conference room.

As the TSA looks to the future, Administrator John Pistole wants to utilize a risk-based system to safeguard air travelers.

Last month, Pistole said down with *Centerlines* for an interview with ACI-NA President Greg Principato at TSA headquarters.

In the wide-ranging interview, Pistole noted, "I want to try to place more emphasis on things we sense as high risk and, frankly, not spend so much time on those we sense as lower risk."

"Risk management is central to TSA's counterterrorism mission. We will never eliminate it but we implement effective layers of security that help us manage risk. My goal

for the future is to use intelligence in a more informed fashion so that we provide the best possible security for the traveling public but doing it in a way that provides greater scrutiny to those that need it, and not use a one-size-fits-all approach for everybody."

The TSA is exploring a number of options, he said, including the use of Trusted Traveler programs. "We're looking at a number of things; including using the information we already have about each traveler—date of birth, name, gender—and then what other information might be available to help inform judgments and decisions.

"We're also exploring the idea that certain groups of people—very frequent travelers, for instance—might be willing to give more information about themselves if

it means a different screening experience for them. There are number of different possibilities."

During the interview, Pistole talked about several different topics in addition to risk-management.

"Airports have been, are and will continue to be vital to effective aviation security. Without strong partnerships between all those with a stake in getting travelers safely to their destinations, the system breaks down.

"What I am hearing on my visits is that the relationship is good. I believe open and honest dialogue, even—and especially—when we disagree is vital to enhancing our partnership. We share the goal of getting travelers to their destination safely and efficiently."

At the time of the interview, Pistole had just announced his decision to suspend the "opt-out" program. He told ACI-NA that the door is not shut on the program.

"To any airport that comes in with something innovative, something cost efficient, something that shows we can do our business in a better way, I very much want to hear those ideas. I would be remiss in my responsibilities as the Administrator not to consider those ideas."

Pistole noted that since being confirmed as Administrator of TSA, the agency has only received two or three applications to join the "opt-out" program.

Pistole explained that he suspended the expansion of the “opt-out” program because of his “preference for a federalized workforce dealing with counter-terrorism. We must retain our ability to operate as a flexible nationwide security network.”

Other issues:

On collective bargaining: “My decision will not impact the traveling public. Prior to making this decision,

I conducted a lengthy, thorough assessment of the impact collective bargaining might have on security. The driving principle of my assessment from the beginning was I would not allow anything to move forward that I determined would have even a minimal negative impact on security. We will never negotiate on security. If they vote for it, it could address a lot of the frustration with inconsistent personnel policies and application of those policies.”



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More TSA dogs in airports: “We are a strong supporter of canines—both for actual deterrent, sniffing explosives and a physical deterrent to scare potential terrorists away. We are very interested in vapor-wake technology with dogs now trained to pick up the vapor.”

Post Moscow airport bombing: “We have engaged with the local airport police about new ways to assist airports in enhancing security without trying to encroach on their turf. We’ve asked: Would additional VIPR teams be helpful and offered to assist with random vehicle inspections from time-to-time? There are a number of things we could do, but they all have a resource tag to them. It is a question if it is TSA responsibility, airport police, the airport authority or a shared responsibility. We can keep pushing the perimeter out away from the checkpoint, but the question is that it comes at a cost. Who will bear the cost?”

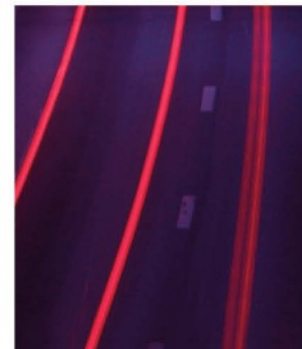
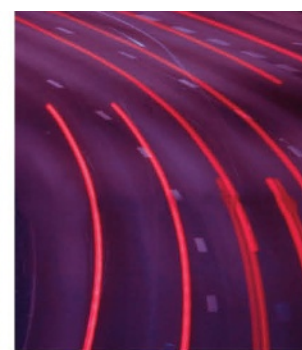
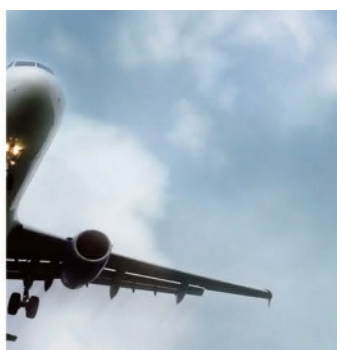
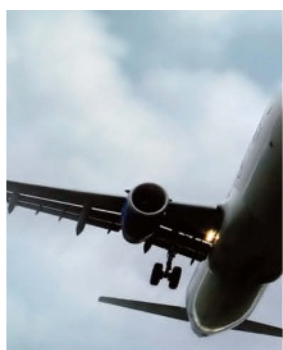
On new technology: “We’re looking at a number of potential near-term changes, including software upgrades for advanced imaging technology that eliminates passenger-specific images and instead depicts anomalies on a generic outline of a person. This software is currently being tested in three airports and we’re hopeful that we’ll be able to deploy it nationwide in the near future. We’re also exploring solutions to the 3-1-1 rule and the requirement that all passengers remove their shoes during screening.”

Your worries: “I am concerned about the unknowns that we have not identified as threats. We see cargo plots, well-disguised bombs, underwear bombs, thermoses. What concerns me is that we have not identified something in front of us.” ■

WEBLINK

- A complete transcript of the interview is available on the ACI-NA website:
<http://www.aci-na.org/static/files/TSAanswers.pdf>

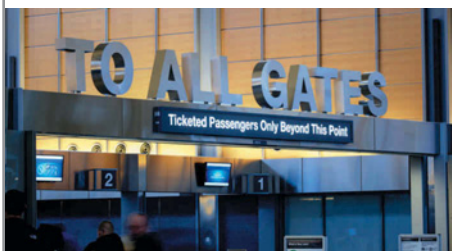
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Restaurants and shops at Raleigh-Durham's new Terminal 2. This phase of the \$570-million project completes construction on the first phase that began in April 2006.



The second phase of Terminal 2, which opened Jan. 23, features 17 new gates. The first phase opened on October 28, 2008 with 19 gates.

Terminal 2 Takes Shape at Raleigh-Durham

RALEIGH-DURHAM INTERNATIONAL AIRPORT

opened the second phase of Terminal 2 on Jan. 23, featuring 17 gates, 13 new shops and restaurants and one ticketing island.

This phase of the \$570-million project completes construction on the first phase that began in April 2006. The project team consists of Fentress Architects of Denver, architect; O'Brien/Atkins Associates of Durham and The Freelon Group of Research Triangle Park, associate architects; Parsons Transportation Group, project manager; and Archer Western of Atlanta, general contractor.

Restaurants and shops on the new concourse include Carolina Vintages, which will feature North Carolina wines and produce; Jason's Deli;

Five Guys; and Flavours, a gourmet market. Passengers will also find Brooks Brothers, Life is Good/Kids Works, CNBC, Brighton Collectibles and 2nd Edition Booksellers, a used bookstore.

One of the highlights of the terminal includes a meet-and-greet area located adjacent to the security checkpoint. Here, friends and family can wait for arriving passengers. A Starbucks Coffee will be located next to the area, which will have tables, chairs and information on arriving and departing flights.

The first phase of the terminal opened on Oct. 28, 2008 with 19 gates, 24 shops and restaurants, two ticketing islands and a new federal inspections area for international travelers. ■

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Atlantic City International Airport to Break Ground on Federal Inspection Station

A CEREMONIAL GROUNDBREAKING was held in December for the new federal inspection station at the Atlantic City International Airport.

The 75,000-square-foot expansion of the airport will provide the space and facilities for processing international flights and will allow airport officials to pursue international air carriers and air service routes.

The \$25 million construction project includes a Customs and Border Patrol Facility, an expanded baggage claim area that will provide space for customs services to process international passengers, apron reconstruction, installation of new passenger boarding bridges, relocated aircraft parking and the installation of specialized and general building

equipment. The project also includes additional concessions and restrooms to accommodate the increase in passengers.

"Moving forward with the federal inspection station will support our work to attract new airlines and air service routes to maximize the capacity of the airport and to provide regional travelers with an affordable and convenient travel alternative. We are pleased to finally be moving forward with this critical project," Bart R. Mueller, South Jersey Transportation Authority executive director, said.

The expansion project, under contract with Hunter Roberts Construction Group of Philadelphia, is expected to create approximately 200 construction jobs.

The airport is experiencing its best year yet in passenger numbers. Through November, the regional airport has already served more than 1.3 million customers, more than it has served in any full year in its history. Passenger counts are more than 35 percent higher than last year, and monthly counts are substantially higher in 2010 compared to corresponding months in the previous year.

"We provide a level of customer service and ease of travel that passengers enjoy once they discover us," Muller said. "The addition of new air service, especially international service, will enable us to serve our customers better and to attract them to ACY more often."

The project is anticipated to be completed by summer 2012. ■

Long Beach terminal-concourse construction breaks ground

OFFICIALS BROKE GROUND on a new \$28 million terminal and concourse in December at Long Beach Airport following a decade of tremendous growth in passenger volume.

The project includes replacement of bungalows now used as waiting rooms, new passenger security corridors, boarding lounges and restaurants.

The historic Art Deco main terminal will remain, though the building is getting a new roof, paint, furnishings and minor exterior upgrades.

"It's going to be a beautiful new building, much better suited and comfortable for customers, but it's not going to take away the 'boutique' feeling the airport is known for," Mario Rodriguez, Long Beach airport director, said. "We also expect this to facilitate better flow of passengers, from check-in to screening to boarding the airplane."

The construction contract was awarded to Edge Development, a

Temecula-based firm. Roughly 350 workers are anticipated to be hired during the 30-month construction phase. Modernization is being paid for by recently sold airport bonds, existing passenger fees and federal grants.

The 19,000 square feet of space currently used to house waiting rooms, restrooms and concessions—in separate wings detached from the historic main terminal—will be replaced by the 34,750-square-foot concourse. The concourse will sit directly behind the historic main terminal.

The main portion of the project will be a state-of-the-art \$24 million concourse, which is certified under Leadership in Energy and Environment Design, or LEED, guidelines.

The building will incorporate eco-friendly features that include solar panels, low-flow plumbing, large windows following the length of the



The \$28 million terminal and concourse project at Long Beach Airport will include replacement of bungalows now used as waiting rooms, new passenger security corridors, boarding lounges (shown here) and restaurants.

terminal and a garden atrium, said Juan Lopez-Rios, the airport's lease manager.

Solar panels will eventually provide 13 to 20 percent of the airport's overall energy needs, Rodriguez said.

The modernization is part of a \$140 million, three-phase airport improvement project scheduled for completion by 2013. ■

San Diego



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Welcome New Members

ACI-NA has received the following applications from the following airports, new ACI-NA World Business Partners and Associate Members. ACI-NA World Business Partners and Associate Members represent a wide variety of private industry businesses which provided products, equipment and services to airports and the aviation industry. Through this program, ACI-NA World Business Partners and Associate Members work with ACI-NA Airport Members to address industry issues and discuss new technologies and innovative ideas.

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Airport Manager
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CEO/President
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P: (817) 498-0388
F: (817) 281-1867
E: shirley@aviationallianceinc.com
www.aviationallianceinc.com

Aviation Alliance was founded in 1980 and since 1990 has focused on airport consulting services for all sizes and categories of airports. The company specializes in airfield electrical and navigational aids installation designs that emphasize ease of maintenance, safety, system durability, and sustainability. Additional work areas are specialty planning, power system studies, civil design, and expert witness services.

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Executive Vice President
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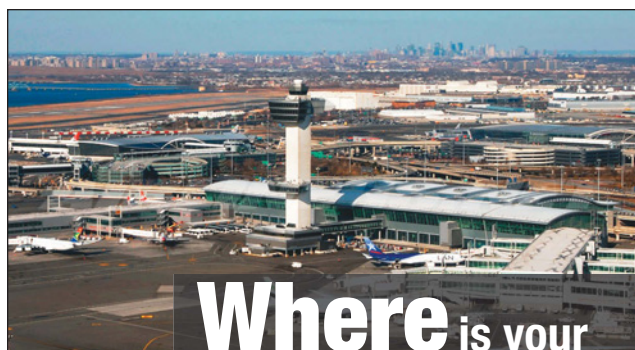
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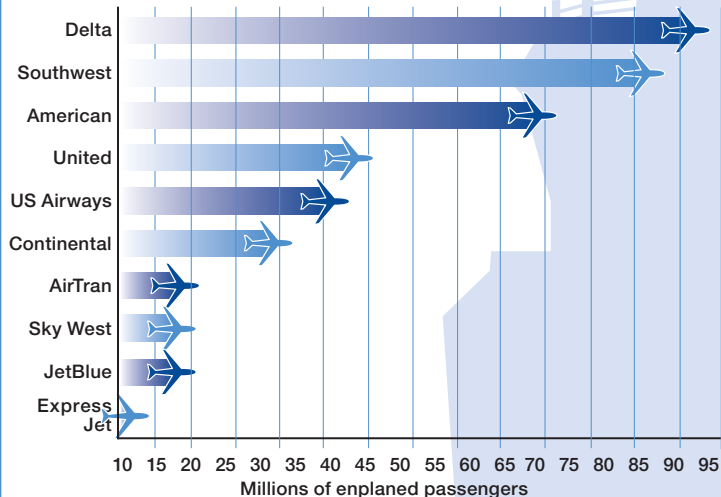
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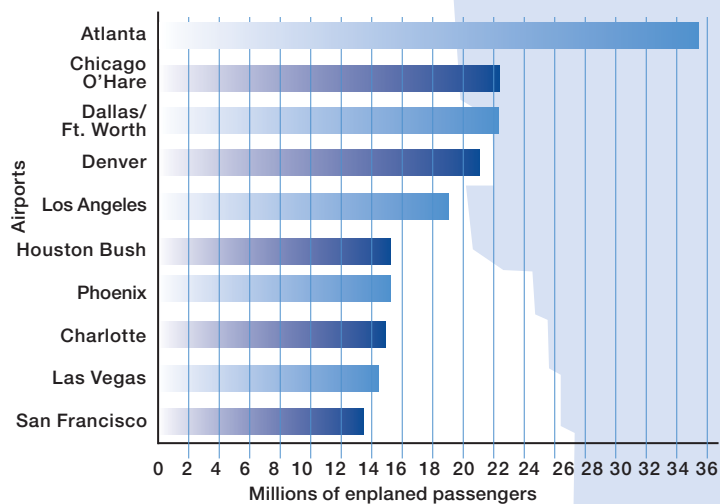
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Top Ten U.S. Carriers – January to October 2010



Source: Bureau of Transportation Statistics, T-100 Market

Top Ten U.S. Airports – January to October 2010



Source: Bureau of Transportation Statistics

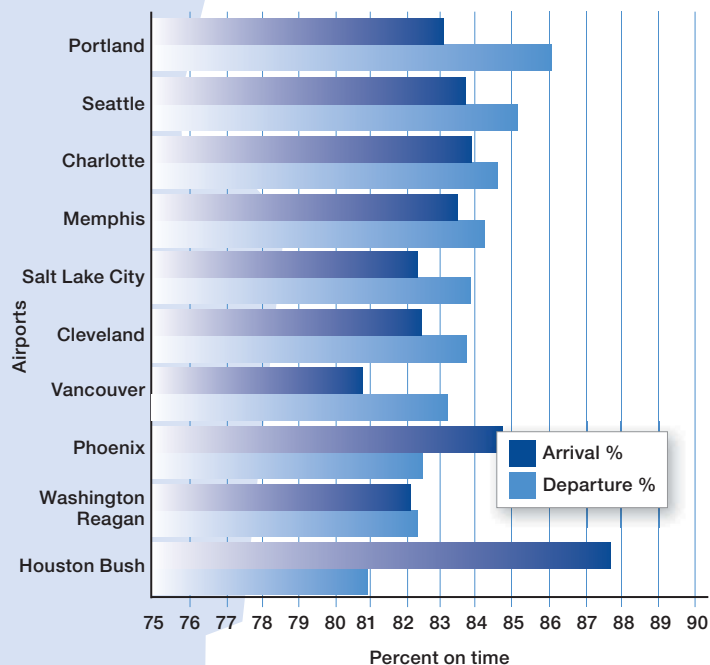
Scheduled System Airline Travel on U.S. Airlines – January to October 2010

	YTD 2009	YTD 2010	Percent Change
Passengers (in millions)	592.1	603.6	2.0
Flights (in thousands)	8,027.3	7,963.2	-0.8
Revenue Passenger Miles (in billions)	648.8	670.6	3.4
Available Seat-Miles (in billions)	805.7	814.4	1.1
Load Factor	80.5	82.3	1.8

Source: Bureau of Transportation Statistics

2010's Top Ten North American Airports Ranked by Best On-Time Departure Averages

With Corresponding On-Time Arrivals

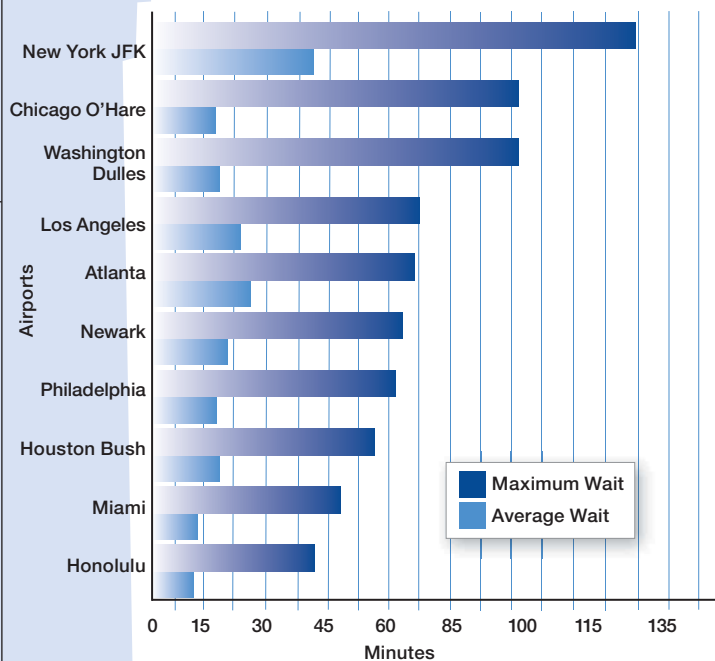


Based on data for 2010.

Source: FlightStats.

Up-to-date statistics available at www.flightstats.com/centerlines.

Top Ten U.S. Airports by Longest Customs Wait – December 2010



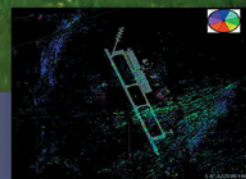
Data for the 10 busiest airports for the busiest time period at each airport's busiest international facility. Source: U.S. Customs and Border Protection.

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