

**Impressum:** a private initiative edited by Nicholas Degen & Willfried Schmid.  
Monthly published & e-mailed worldwide supported by professionals & associated members of the aviation industry.  
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**SUMMER CHARTER OUTLOOK** - Figures for the Summer 2003 may promise better turnouts. At peak times, 97 weekly departures are scheduled (90 in 2002), mostly heading for Mediterranean spots (Spain 29, Greece 16, Turkey 15, Tunisia 12, Italy, Portugal, Bulgaria/Croatia 4 each, Cyprus, Morocco 2, Malta 1). Overseas destinations add some colour to the traditional European/North African travel menu (see special chart) About 15'800 seats are for sale (14'400 in 2002) at the height of the season. The bulk of charter capacity is contracted by ASC, Aeroviaggi, Avione, Etapes Nouvelles, FTI, Marmara, Starter, Thomas Cook, Tourivac, TUI, Universal. Some is passed to other t/o's. **To which extend the Iraqi war** will influence leisure travel is unclear. Some changes are expected. Presently, the Swiss and German public go mainly for last-minute offers.

**FI** reports: Analysts are trying to assess the consequences for Algeria's banking system after the country's largest private sector bank Khalifa was placed in administrative receivership. The bank's problems date back to November when it was banned from making transfers outside Algeria. The fate of **Khalifa Airways** is closely connected with Khalifa Bank. News arrived that Khalifa's credit line suffered a setback. Aircraft leases (ATR/A319) had to be called off with 16 aircraft remaining. Weekly flights to Constantine (3x) and Algier (1x via GVA) are kept alive. Khalifa hopes to increase services again in late June.

**TRAVEL TRENDS – THIRD WAY HYBRID** for majors ? It is no surprise that travellers have picked up a different attitude when choosing the airways. Full-service airlines are hard-pressed to cope with falling ticket prices which are painfully offsetting their calculations and budgets. IATA's corporate travel survey suggests a steady decline in regular (premium/business class) bookings on shorthaul routes (43% are buying discounted tickets by now). The days seem to have gone where full in-flight service was a demand by the public. Instead much attention has turned to economy/no-frills fares. Full-service airlines are slowly getting this message, at last. Flight International reports : „The Association of European Airlines (AEA) concedes a need to study concepts (third ways) which may pave the way for point-to-point services at lower fares within Europe. Aer Lingus and BA are to introduce one-way fares which should offer exactly what travellers want to see : basic point-to-point tariffs. Should there be a request for network benefits (interlining, special ground services) additional service charges will be in place. How far advanced the studies are depends on the degree of market penetration by low cost carriers in the home markets of AEA-members“.

**On August 19 2002**, the SWISS CEO spoke his mind for the full-service, premier airline case. He was also quick to say that if markets wish to see lower fares, SWISS would certainly respond accordingly. The markets now seem to expect such moves. AEA secretary general was quoted that he expects other airlines to follow Aer Lingus' and BA's move in due time. **“SWISS easy safer“** will not be the last act of fare twisting Point-to-point travellers are increasingly anxious to see better offers from SWISS.

**REGIONAL EXCELLENCE** has become another challenge to SWISS. Turning around the sagging regional sector is now a priority at last. Logistical, operational and technical flaws have led to irregularities below acceptable industry standards (98%). The EAP saw about 300 flights being called off due to operational and technical reasons in December thru February. SWISS hopes to regain positions once held under Crossair.

**\*SWISS'** Summer schedule marks a sharp retreat to 1996 levels (frequencies/destinations). Flights to Munich have not been reduced because of Lufthansa's presence.

## CARGO UPDATES

**CARGO** (2-month figures) is restarting its performance.  
Cargo on scheduled flights 1'000 (1'877) -47%  
Expresscargo 3'752 (3'471) + 8%  
Adhoc cargo 27  
Total cargo flown 4'779 (5'402) - 12%  
Total cargo trucked (RFS) 8'058 (7'074) +14%  
**Total cargo flown/trucked 12'837 (12'476) + 3%**

**KE CARGO's** weekly capacity of 90 tons of of main deck and lower deck positions are being split between KE-stations Basel (45 tons), Milano (20 tons) and SWISS (15 tons hard block/5 tons soft block). KE BSL is again ranking second in terms of sales targets met. KE's prime loads are pharma and chemical products bound for the Asian markets. Korean enjoys high service ratings from companies like Novartis Pharma. Since February 28, **SWISS** cargo sales have not quite kept pace with the contracted block space (February 28: 20 to., March 7: 20 to., March 21: 10 to.).

**PEUGEOT CAR PARTS** are shipped by air again. From January to March 2003 adhoc charters airlifted key parts to Coventry and other assembly lines to keep production running (Artac Aviacion/Atlantic Airlines/Enimex/WDL)

**SPECIAL AIRCRAFT** to Ouagadougou (AN-124, Antonov Design Bureau) and to Coventry (DC-6F, Atlantic Airlines).

## SUMMER SCHEDULE effective April 01 (weekly services)

*SWISS (a/c)	days	AIR FRANCE	days
Amsterdam (S20)	1-7 (19)	Bastia* (AT7)	6
Barcelona (S20)	1-7 (19)	Clermont-Ferrand	1-5 (10)
Bern (S20)	1-6 (6)	Lyon (ER3)	1-7 (17)
Berlin THF (S20)	1-7 (20)	Nice (ER3)	1-7 (7)
Birmingham (ER4)	1-7 (12)	Paris CDG (EQV)	1-7 (28)
Brussels (S20)	1-7 (19)	Paris ORY (a20/21)	1-7 (43)
Düsseldorf (S20)	1-7 (19)	Rennes (E120)	1-5 (10)
Geneva (S20)	1-7 (12)	<b>KHALIFA</b>	
Hamburg (ER4)	1-7 (19)	Algier (EQV)	5
Hannover (SF3)	1-7 (12)	Constantine (EQV)	2/4/6
London LHR (A21)	1-7 (21)	Oran* (EQV)	3°
London LCY (S20)	1-7 (18)	<b>LUFTHANSA</b>	
Lugano (S20)	1-6 (6)	Frankfurt (RJ8)	1-7 (28)
Madrid (S20)	1-7 (7)	Munich (EQV)	1-7 (31)
Manchester (ER4)	1-7 (18)	<b>PORTUGALIA</b>	
Milan MXP (SF3)	1-7 (12)	Lisbon (ER4)	1-5/7
Munich (SF3)	1-7 (25)	Porto (ER4/F100)	1-7
Nice (ER4)	1-7 (7)	<b>TURKISH</b>	
Rome (S20)	1-7 (7)	Istanbul (B734)	3/6
Vienna (S20)	1-7 (19)		
Zurich (EQV)	1-7 (21)		

LX : Ajaccio\* (4), Naples\* (4), Olbia\* (3) \*seasonal flights  
EQV = equipment varies  
°expected to start in late June



Basel's Soccer Club debut in the **CHAMPIONS LEAGUE** mobilized 20'000 (roundtrip) passengers mainly from the Basel area attending all 16 games held at Basel, Glasgow, La Coruna, Liverpool, Manchester, Moscow, Turin, Valencia and Zilina.

54 charters were booked with Glasgow (5 flights, 1'600 pax), Liverpool (10 flights, 4'000 pax) and Manchester (12 flights, 5'000 pax) as true highlights.

SWISS got the lion's share of the work (29 charters) with MD83 (22) A320 (1), A321 (2), A330 (2), Saab 2000 and ARJ100 (1). Other carriers like Neos (4) Belair (3), Futura (3), Hamburg International (2) added some colour to the line-up of flights. So did AeroLloyd, AirLib, Air2000, British Midland, Blue Panorama, Cougar, Eurowings, Farnair, HapagLloyd, NordicAirlink and Titan.

A diverse fleet of aircraft was much to the delight of the fan communities at all airports. Liverpool saw its tarmac close to saturation.

Extra widebody DC-10-30 (AirLib), B-767-300 (Belair), A310 (HapagLloyd) also gave the treasury another unexpected lift.

The season 2004/2005 will see two Swiss teams in the royal class of football.

(photos : Marc Bitter/Marc Seidel/Chr. Drändle/S. Glaentzlin)



BAK Economics Basel offers an update on its latest benchmarking study „**ACCESSABILITY OF REGIONS**“ by means of transportation (see NL 11/02) as one of many business location factors. BAK is specializing in (regional) benchmarkings which offer important data for planners and development authorities.

**Basel, Frankfurt, Geneva, Lyon, Milan, Munich, Stuttgart, Vienna and Zürich** are under review to start with. Their accessibility is put to a test on intra-regional, European and intercontinental grounds (1).

Efforts to clear the range of „accessability factors“ have produced guidelines to meet scientific standards. The following criteria are now favoured for simplicity reasons :

- expectations** 50 European destinations\* are to be tested for outbound connectivity (between 07.00-10.00 local time)
- impedance** travel time spent
- mode of transport** \*air/rail/road (inter-modal/uni-modal)
- impediments** by air: land-side and air-side (assessed+rated) by car: speed limits, customs clearance switching from air/rail, air/car, car/rail
- attractions at destination**
  - a) gross domestic product
  - b) quality of services rendered
  - c) research & development activities (jobs, reputation of R&D institutions)
  - d) cluster building as factor
  - e) strength of financial sector

The quality and quantity of infrastructure (rail, road air) is one criterion among others.

\*Each mode of transportation will outperform the other to certain destinations (ie. ex BSL to Frankfurt by rail, London by air, Stuttgart by car etc.).

The study will target a coherent (geographical) network of regions in order to arrive at comparable data.

**\*Regions to be earmarked :**

all of Austria and Switzerland, Eastern France, Rhones-Alpes, Northeastern Italy, Lombardia, Piemont, Baden-Württemberg, Bavaria, Rhein-Main area, all of Benelux (Belgium, Luxemburg, Netherlands), parts of Tschechia, Slovakia and Hungary (the latter as likely add-ons).

Range of possible characteristics related to accessibility

**destination of origin** (inbound and outbound)  
**who is interested in fast of access to regions ?**

- manufacturing and service-oriented sectors
- business travellers in general
- tourists
- population in general or particular interest groups

**travelling expenses**

- time spent for travelling
- out of pockets costs (ticket purchase, gasoline etc.)
- general costs (time factor + out of pocket costs)
- quality of transportation (safety/reliability/frequency)

**accessability** related to three areas of connectivity (1)

**mode of carrier** – air, rail, road, (tele)communication

**combination** of carriers : uni-modal = one carrier only, inter-modal = air/rail, road/rail, multi-modal = selection of cheapest carrier

**who/what** is to be carried - people/merchandise/news

(air/rail/road) **impediments to efficient carriage**

- border-crossing
- efficiency of means of transportation
- sustainability

**attraction** at destination education/qualification standard, economic activities (BIP, cluster-building, R&D, quality of services, supplier & customer base), tourist attraction

**The quality of accessibility is also shaped** by other area-related data like size, geography and compactness. The specific nature of clusters available will also carry some weight when a system of indicators is mapped out.

**To airports** it is of interest to understand their hinterland. Additionally, benchmarking efficiency by air on stretches with other means of carriage also available can help to improve ground services at airports.

Access to destinations located outside of the targeted regions will be looked at in terms air services only (ie. Barcelona, Düsseldorf, Hamburg, London, Madrid, Paris).

**AIRPORT OUTLOOK - A FINAL TENDER** is on the way to four bidders left in the race which started a year ago. A first tender was set up to test the market if there is any interest in promoting a site (Zone 4, 270'000 sqm.) to the Southeast of the EAP earmarked for future development.

**SUMMER 2003 – CHARTER SCHEDULE SUMMER 2003 – EUROAIRPORT BASEL-MULHOUSE-FREIBURG**

Destination	Day	Period	Airline	Type A/C	Touropoperator
<b><u>EGYPT</u></b>					
Hurghada (HRG)	6	05.07.03-25.10.03	Luxor Air	MD83	Starter
	7	06.04.03-04.05.03	Swiss SUN	MD83	Starter
Luxor (LXR)	6	29.03.03-25.10.03	Lotus Air	A320	Etapes Nouvelles
	7	06.04.03-04.05.03	Swiss SUN	MD83	Starter
<b><u>BULGARIA</u></b>					
Varna (VAR)	6	03.05.03-27.09.03	Air VIA	TU154	Starter
<b><u>DOMENICAN REPUBLIC</u></b>					
La Romana (LRM)	1	30.03.03-26.10.03	Aéris	B767-300	Avione
Puerto Plata (POP)	7	13.05.03-23.10.03	Aéris	B767-300	Avione
Punta Cana (PUJ)	1	05.05.03-27.10.03	LTU	A330-200	FTI
<b><u>GREECE</u></b>					
Athens (ATH)	4	10.07.03-16.10.03	Nordic Airlink	MD82	Avione, FaB
	6	12.04.03-04.10.03	Futura	B737-400	Starter, Esco
	6	29.03.03-25.10.03	Aegean Cronus	B737-400	Etapes Nouvelles
Heraklion (HER)	1	14.04.03-27.10.03	Iberworld	A320	Starter
	5	02.05.03-31.10.03	Hapag-Lloyd	B737-800	TUI
	5	11.04.03-07.11.03	Nordic Airlink	MD82	Avione
	6	12.04.03-04.10.03	Transavia	B737-800	Starter
	6	24.05.03-04.10.03	Swiss SUN	MD83	Hotelplan
	6	05.04.03-25.10.03	Aegean Airlines	B737-400	Etapes Nouvelles
	7	13.04.03-09.11.03	Nordic Airlink	MD82	Avione
Korfu (CFU)	1	26.05.03-13.10.03	Nordic Airlink	MD82	Avione
	2	06.05.03-07.10.03	Iberworld	A320	Starter
Kos (KGS)	7	01.06.03-12.10.03	Swiss SUN	MD83	Hotelplan
Rhodos (RHO)	2	06.05.03-07.10.03	Iberworld	A320	Starter
	4	01.05.03-23.10.03	Hapag-Lloyd	B737-800	TUI
	6	12.04.03-08.11.03	Nordic Airlink	MD82	Avione
<b><u>ITALY</u></b>					
Catania (CTA)	5	04.04.03-03.10.03	STAR Airlines	A320	Aeroviaggi
	6	05.04.03-01.11.03	Azzura Air	B737-700	Starter
Palermo (PMO)	5	11.04.03-03.10.03	Iberworld	A320	Starter
	5	04.04.03-03.10.03	Air Méditerranée	B737-500	Aeroviaggi
<b><u>KENYA</u></b>					
Mombasa (MBA)	5/7	09.05.03-24.04.03	ASA	A310-300	ASA Club
<b><u>CROATIA</u></b>					
Dubrovnik (DBV)	6	24.05.03-18.10.03	Axis	B737-300	Avione
<b><u>MALEDIVES</u></b>					
Male (MLE) via CMB	2	30.03.03-26.10.03	Aéris	B767-300	Avione
<b><u>MALTA</u></b>					
La Valetta (MLA)	6	12.04.03-04.10.03	Air Malta	B737-300	Starter
<b><u>MAROC</u></b>					
Agadir (AGA)	6	14.06.03-25.10.03	Royal Air Maroc	B737-500	Starter
Marrakech	5	04.04.03-24.10.03	Royal Air Maroc	B737-400	Etapes Nouvelles
	6	05.04.03-07.06.03	Royal Air Maroc	B737-500	Starter
<b><u>PORTUGAL</u></b>					
Faro (FAO)	3	28.05.03-01.10.03	Iberworld	A320	Starter
	3	09.04.03-15.10.03	Hapag-Lloyd	B737-800	TUI
Funchal (FNC)	3	07.05.03-29.10.03	Iberworld	A320	Starter
<b><u>SPAIN</u></b>					
Ibiza (IBZ)	3	28.05.03-15.10.03	Nordic Airlink	MD82	Avione
	6	03.05.03-04.10.03	Iberworld	A320	Starter
	6	03.05.03-25.10.03	Hapag-Lloyd	B737-800	TUI
Mahon (MAH)	7	18.05.03-12.10.03	Hapag-Lloyd	B737-800	TUI
Palma de Mallorca (PMI)	3/5/7	09.04.03-29.10.03	Hapag-Lloyd	B737-800	TUI
	5	11.04.03-24.10.03	Swiss SUN	MD83	Thomas Cook
	5	11.04.03-07.11.03	Nordic Airlink	MD82	Avione
	6	03.05.03-04.10.03	Futura	B737-400	Starter
	6	03.05.03-11.10.03	Air Europa	B737-800	Tourivac
	6/7	24.05.03-11.10.03	Swiss SUN	MD83	Hoterplan
	7	04.05.03-19.10.03	Futura	B737-400	Universal
	7	02.02.03-19.10.03	Spanair	MD83	Universal
	6/7	04.05.03-19.10.03	Air Europa	B737-300	Universal
Lanzarote (ACE)	2	01.04.03-28.10.03	Hapag-Lloyd	B737-800	TUI
	4	01.05.03-30.10.03	Iberworld	A320	Starter
Fuerteventura (FUE)	1	07.04.03-27.10.03	Hapag-Lloyd	B737-800	TUI

## SUMMER 2003 – CHARTER SCHEDULE SUMMER 2003 – EUROAIRPORT BASEL-MULHOUSE-FREIBURG

### SPAIN continued

<b>Las Palmas (LPA)</b>	6	03.05.03-25.10.03	Iberworld	A320	Starter
	7	06.04.03-26.10.03	Hapag-Lloyd	B737-800	TUI

<b>Tenerife (TFS)</b>	4	01.05.03-30.10.03	Hapag-Lloyd	B737-800	TUI
	4/5	04.05.03-30.10.03	Iberworld	A320	Starter

### TUNISIA

<b>Djerba (DJE)</b>	1	05.05.03-27.10.03	Swiss SUN	MD83	Starter
	6	31.03.03-26.10.03	Nouvelair	MD83	Etapes Nouvelles
	6 (2x)	05.04.03-26.04.03	Tunis Air	B737-600	Starter
	7	13.04.03-02.11.03	Axis Airways	B737-300	Avione
<b>Monastir (MIR)</b>	3	02.07.03-24.09.03	Tunis Air	A320	Starter
	6	31.03.03-26.10.03	Nouvelair	A320	Etapes Nouvelles
	6	31.05.03-25.10.03	Tunis Air	B737-600	Hotelplan
	3/6/7	05.04.03-01.11.03	Tunis Air	A320	Club Med
	7	13.04.03-02.11.03	Axis Airways	B737-300	Avione

### TURKEY

<b>Antalya (AYT)</b>	1/4	31.03.03-27.10.03	Onur Air	MD88	Marmara
	2	08.04.03-14.10.03	Sun Express	B737-800	Thomas Cook
	5 (2X)	11.04.03-31.10.03	Sun Express	B737-800	TUI
	5	30.05.03-24.10.03	Swiss SUN	MD83	Hotelplan
	5/6	04.04.03-31.10.03	MNG Airlines	B737-400	Avione
<b>Istanbul (IST)</b>	4/7	04.03.03-23.10.03	Pegasus	B737-800	Marmara
	4/7	03.04.03-30.10.03	Onur Air	MD88	Maxi
<b>Izmir (ADB)</b>	5	28.03.03-31.10.03	Onur Air	A320	Starter
	6	29.03.03-25.10.03	Pegasus	B737-800	Marmara
	7	04.04.03-31.10.03	MNG Airlines	B737-400	Avione

### CYPRUS

<b>Larnaca (LCA)</b>	6	31.05.03-25.10.03	Eurpcypria	B737-800	Hotelplan
	6	12.04.03-01.11.03	Axis Airways	B737-300	Avione

all subject to change without notice