

**INCOMING TOURISM** is an issue for all tourism boards within the Regio TriRhena (Alsace/Sudbaden/Basel). Following **INTERREG III**, a kickstart tool for cross-border connections within the EC, new action has been approved.

First, **A STUDY** will help to identify incoming (European and overseas) markets eventually, followed by strategy proposals designed to generate passengers via the EAP. First results are expected in early 2004. The study is supported by **Focus Management Consulting** (Austria) and **Détente Consultants** (France) operating with a budget of 73'290 Euro. Additional money is coming from the General Council of Haut-Rhin (14'352 Euros).

Second, **INTERNET ACCESS** for the tourism industry, individuals and others seeking direct information about the Regio TriRhena is next on the list. The website is expected to be fully operational within one year's time.

Third, **A WELCOME DESK** at the EAP should help guests to go about their ways when heading for business, cultural events or conventions.

Supervision will be in the hands of a program director. The entire project is financed through EC funds (40%), Basel, Colmar, Freiburg and Mulhouse with a total of 790'000 Euros over a five year time-span.

## CHARTER TRAFFIC 2003 (JANUARY-JULY)

<b>GERMAN CARRIERS</b>	115'065	+ 18%
HAPAG LLOYD/LTU		
<b>FRENCH CARRIERS</b>	52'558	+ 280%
AERIS, AXIS		
<b>SWISS CARRIERS</b>	41'737	- 50%
SWISS SUN		
<b>OTHER CARRIERS</b>	230'095	+ 8%
from all of EUROPE		
<b>TOTAL PASSENGERS</b>	<b>439'455</b>	<b>+ 6%</b>

## CARGO FIGURES 2003 (JANUARY-JULY)

GENERAL AIRFREIGHT flown	3'695	-13%
EXPRESSCARGO flown	13'557	+7%
AIRFREIGHT adhoc	223	+4%
<b>TOTAL FREIGHT</b> uplifted	<b>17'475</b>	<b>+2%</b>
<b>TOTAL FREIGHT</b> trucked	<b>29'568</b>	<b>-1%</b>
<b>TOTAL FREIGHT</b> handled	<b>47'043</b>	<b>+0%</b>

**KE CARGO** offered a total of 24 departures in the 1<sup>st</sup> Quarter of 2002 compared to 24 in the first seven months of 2003 with a Friday departure.

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**Worldwide Medical Express** shipments are also offered by TNT/Post Group to the research communities located in all three markets of the EAP.

## 4 CITIES, 3 COUNTRIES, 2 LANGUAGES, 1 AIRPORT

Top companies in the Greater Basel were surveyed by travelmanager last Spring asking for travel data like budgets number of trips and the range of destinations (locations, countries, regions) on high demand. The entire survey was published in the monthly periodical **TRAVELMANAGER** last April.

Name of Company	Budget & Trips	Destinations	handled by	in-house handling
<b>BLG</b> Switzerland Basel (forwarding)	<b>budget n/a</b> 20 trips shorthaul 5 trips longhaul	Belgium/England France/Germany Portugal/Spain	ACS Arnold Travel	outsourcing
<b>PANALPINA</b> Basel (forwarding)	<b>3.1 mio. in CHF</b> , 2% domestic 68% Europe 30% interconti	Amsterdam/Brussels Hamburg/London Nürnberg etc. Miami etc.	AMERICAN Express	outsourcing
<b>COOP SCHWEIZ</b> Basel (retailing)	<b>3 mio in CHF</b> 30 shorthaul trips 60 longhaul trips	Europe/Asia USA	BASILISK Travel	outsourcing
<b>CIBA</b> Specialities Basel (chemicals)	<b>12 mio. in CHF</b> 3'700 medium & 2'000 longhaul	Brussels/Manchester New York etc.	CARLSON Wagons Lits	implanted CWT set-up
<b>SYNGENTA</b> Basel (agro)	<b>22 mio. in CHF</b> 8'300 medium & 3'700 longhaul	Amsterdam/Brussels London/Manchester Paris/Greensboro NC	BUSINESS TRAVEL Kuoni partnership	explanted travel organization
<b>ROCHE</b> (pharma)	<b>budget n/a</b> 20'000 trips by air and rail	Brussels/London/Munich New York/San Francisco Shanghai etc.	BUSINESS TRAVEL Kuoni partnership	travel organization with Kuoni liscence

Of interest is who may travel in business and who is to stick with economy class. Within Europe travel is mostly in economy at Coop, Ciba Specialities, Roche and Syngenta. Most companies have struck deals with selected airlines (group designated airlines). Other services like rent-a-car or hotel accomodations are also based on worldwide contracts with particular hotel chains and car leasing firms.

**SWISS is offering special rates to Novartis, Roche and Syngenta ex Zürich only. At Basel fares tend to be higher even to the same range of destinations served from both airports. This policy has been targeted as unfair to consumers and dangerous for the Basel market. The carrier actively pushes the „train to the sky“ option also, for travels within Europe.**

## IS ANYONE OUT THERE KNOWING OF ANY NICHE-MARKETS WE MIGHT POSSIBLY NOT SEE ?

Please contact your local airport or airline for that purpose.



It is now almost **NINE MONTHS** into year 2003 and as much time has passed when changing strategies by the EAP suggested moves away from airline monopolies to competitive (airline) markets with several players in action.

The time of truth will approach in September when results tell more about the Winter season 2003/04.

## WHAT IS THE EAP's STANDING in this regard ?

While **TOUR OPERATOR PROGRAMS** herald new services for the coming season (Avione/flieg-ab-basel.de/ch).

And, **AIRFREIGHT** is producing positive results to previous years (express and general cargo as well as special shipments).

There is ample **SCEPTICISM** in the industry that a standstill or decline will further depress essential flight availabilities in the schedule sector.

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A recently aired concern why other airports fare better in attracting new airlines than the EAP produced numerous independent comments like :

- ° *The future of SWISS is holding up plans to fill the void left by the carrier (only at the EAP !).*
- ° *Airliners fit for smaller markets (50/70-seater) face strong headwinds in the low fare environment within Europe due to their cost base.*
- ° *The EAP has practiced a hands-off (que serra, serra) style for too long, switching gears to locate new business requires a cultural shake-up.*
- ° *The internal organization (EAP) lacks flexibility which poses a road-block for innovative deals.*
- ° *The EAP is best advised to attend ROUTES 2003 conference at Edinburgh which is considered an opportunity for networking, cultivating personal contacts, building on new connections to make inroads on airline acquisitions.*
- ° *Pooling resources should be the thing to do. The EAP may be better off than doing it alone.*

## OPEN STATUS / POSTPONED / CANCELLED

**AIR FRANCE** – upgrades (schedule/frequency changes) to Nice and Marseille

**AIR NOSTRUM** – morning and evening departures requested to complement SWISS' mid-day flight (IB/LX codeshares)

**AUSTRIAN** – a wait-and-see approach till SWISS drops Vienna

**CIMBER/SAS** – called off for the Winter season

**CIRRUS** – independent carrier with codeshares (LX or LH) under review to Berlin, Hamburg, Dresden, Leipzig

**EASYJET** – called off plans to consider the airport as a base

**HAPAG LLOYD EXPRESS** – called off plans to station jets at the EAP for the time-being

**KLM** – a wait and see approach till SWISS drops Amsterdam

**LUXAIR** – is studying market potentials and network opportunities

**RYANAIR** – called off plans to operate ex EAP

**VLM** – called off plans to London City due to aircraft impasse

## NEW AND EXISTING KEY PLAYERS TO BE COURTED

**AFRICAN SAFARI** – a long-time customer to and from Kenya

**EUROJET CHARTER** – offering aircraft capacity stationed at the EAP for the t/o and adhoc markets

**FARNAIR EUROPE** – with aircraft stationed at the EAP

**HAPAG LLOYD** – a well-established brand with additional stop-over services possible

**KOREAN AIR CARGO** – a cornerstone in freight development

**LUFTHANSA** – primarily focused on Frankfurt and Munich

**PORTUGALIA** – an airline to be positioned with new services

**TURKISH TK** – an airline to be positioned with scheduled flights to Antalya (**Sun Express**)

**THE EUROAIRPORT IS AT THE CENTER-STAGE** to position the Regio TriRhena's common interests and assets as striking potentials with the national governments at Berlin, Berne and Paris. The Chambers of Commerce (CCI, IHK, HKBB) have noticed forces with possibly detrimental effects to regions with cross-border interactions across Europe if not challenged

The airport is in the very heart of the Regio TriRhena and therefore an excellent platform to prove the political will to shape the future of this region of 4 million residents. The bi-national accord of 1949 between France and Switzerland was the beginning of a long string of cooperations which produced INTERREG I, II, III, EUCOR study programs, and Rapid Transit Rail Links to Mulhouse, Freiburg, Schopheim out of Basel etc.

The intention to reform the airport's internal structures has been officially presented on January 15, 2003 by all chambers of commerce within the catchment area (Basel, Freiburg, Mulhouse, Hochrhein/Bodensee). The center-piece of reform is the involvement of Südbaden (equity, knowhow) at the airport. Based on a study by Ernest & Young the most promising way to do so is the creation of two separate entities : **AIRPORT COMPANY** as governing board and **AIRPORT OPERATING UNIT** (Betriebsgesellschaft) contracted to run the daily (commercial/operational) business. This approach would be the least expensive way (time and money) for German parties (private and/or public investors) to get on board.

**How did the political arena respond so far ?** - a report based on data provided by its principal promoter

In general, the degree of identification with the project is positive (Freiburg: very positive, Lahr airport may pose conflicts of interest, Hochrhein/Bodensee: a clear yes, Mulhouse: a yes provided money is forthcoming, Basel: very positive).

The Board of Directors has welcomed the study by Ernest & Young. A special commission is expected to be formed which then will work out the (legal and operational) practicalities. The discussion within France has been launched about how to manage airports in the future (in most cases run by CCI's). The airport management has also pledged its full support. The urgency to implement this strategic move has temporarily lessened as priorities had to be reshuffled due to the actual crisis in the airline industry. However, it is not expected that the present situation will derail this ambitious reform.

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