

# Welcome easyJet

EasyJet has repeatedly looked at the catchment area of Greater Alsace, Southern Germany and German speaking Switzerland in recent years. Yet, the carrier did not find sufficient evidence to start flight operations out of the area, partly due to weak market perspectives out of Britain. The changing airline map in Western Europe with Swissair, Sabena, Crossair and many French airlines practically gone, has opened the gates to new opportunities as we have learnt. SWISS' position has dramatically weakened over the recent past and Unique Zurich has turned out to be an utter commercial failure for easyJet due to many reasons (high passenger and navigation fees). So, the carrier had to do something different. At the same time EuroAirport saw its passenger numbers decline partially because of SWISS' change of focus (Zurich). Again, something had to be done to escape this downward spiral. Apparently both players have done their homework ! easyJet has taken a second look at its chances at EuroAirport. The airport on the other hand has obviously revised its strategy, moving away from a plain provider of infrastructure to a platform willing to be a service-minded gateway for different airlines advocating business models such as easyJet's. This may have triggered the revival of negotiations between easyJet and EuroAirport which has brought forward the deal we presently witness. The new business relationship is source of longterm commitments on both sides. On March 29, 2004, this approach was explicitly underlined by both CEO's (Webster/easyJet – Amiel/EAP). Yours Monty's Flying Circus

Excerpt from the press release....

QUOTE

Following the multi-national advertising campaign led by easyJet since 8 March 2004 in Basel city, French Alsace and South Germany, easyJet has registered strong sales of several thousands of seats on its new routes from and into EuroAirport – London Stansted and Liverpool (one flight daily starting 28 March 2004), Berlin Schönefeld (one flight daily as of 20 May 2004, two flights daily from 17 June 2004). EuroAirport and easyJet Management are pleased by the clear interest shown by a large number of passengers for those routes.

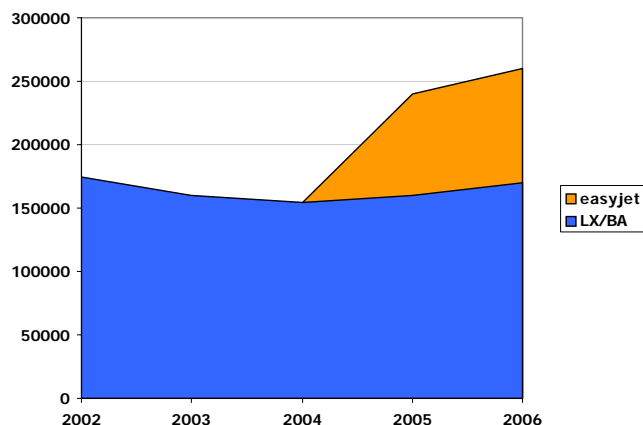
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According to easyJet, projected passenger numbers for the three destinations mentioned will be 230'000 in 2004 and 345'000 in 2005.

...  
Thanks to the offer of 2 flights to Berlin Schönefeld starting 17 June 2004, EuroAirport will be able to enlarge its catchment area in Southern Germany. The easyJet flight to Liverpool, a completely new destination from EuroAirport, opens up possible new business links between North West England, French Alsace, Basel, Freiburg and the Black Forest. Incoming business and leisure travellers will be able to profit from skiing and gourmet holidays in Switzerland, Alsace or the Black Forest and outgoing travellers will be able to discover the Lake District and/or Wales via Liverpool City.

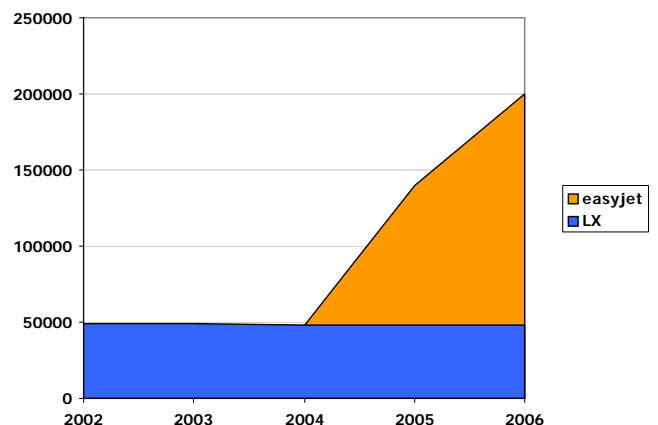
UNQUOTE

## Projected passenger growth (trend for 2004 to 2006)

Basel-London Stansted



Basel-Berlin Schönefeld



## NEWS HEADLINES

### HELLO BASEL

### NETWORK NEWS

*Crossair Europe with all-Saab 2000 fleet*

*Aeropers/SWISS Pilots oppose large QE (Crossair Europe) role*

*Air France on the way down on MRS/CFE routes*

*Air Algeria and Aigle Azur on the way up*

### CHARTER SUMMER 2004

*Airlines - Flights - Tour Operators - Destinations - # of seats available*

### EASYJET' arrival

*Picking the brains (yours Monty's Flying Circus)*

*Press release by EZY/EAP*

*Passenger forecasts*

- London (STN)
- Berlin (SXF)

AirtrafficPromotion Group Basel  
Wanderstrasse 77  
CH-4057 Basel  
Phone:  
(0041) 61 3025775

E-mail: eapnews@gmx.ch

www.eapnews.ch

**HELLO BASEL !** – A prominent passenger and founder of a Swiss regional airline decided to cancel his reservation for the historic flight from Camarillo (California) to Basel aboard the famous Lockheed L-1049 Super Constellation ready to start its trans-Atlantic crossing on April 26 as urgent airline business is emerging at EuroAirport.

News is travelling that a new charter carrier is to be launched by former Crossair and SWISS staff based at EuroAirport. Initial meetings have already taken place, which are aimed at clearing the way for the official take-off in July 2004. The airline is headed by managers who were spear-heading the set-up of SWISS Sun last year but were made redundant in a row over strategies.

Tour operators such as FTI, Starter, Tourivac will be approached for business as early as possible to finalize contracts for the Winter season 2004/2005. The chairman of Starter Voyages maintained very close business ties with Moritz Suter until his forced departure from commercial aviation engineered by bankers, politicians and envoys of Zürich's top brass. Business ties with SWISS were terminated last year when Iberworld became prime carrier for Starter. Regional travel agents will probably go for solid (local) solutions if they become available.

The company, which may even give birth to a 4<sup>th</sup> Balair revival if there is no legal drawback from the Swissair downfall, is reported to be in close talks with TAT Industries based at Nîmes to start aircraft maintenance on behalf of the new airline. The fleet may consist of Boeing MD90 presently parked in Arizona's dry desert climate.

SWISS is currently vacating office and maintenance space at a growing pace mostly driven by ex-Swissair managers' desperate cost-cutting drives even at the expense of solid numbers. Maintenance work of ex-Crossair aircraft at EuroAirport has been stripped off the engineering and documentation department making overnight checks more complex and costly.

Reports are telling that a number of companies have shown some interest in opening technical shops in already emptied hangar space – so far, Jet Aviation is the most prominent address to date. Final discussions concerning a change of tenants have not surfaced, yet. In any case the Swiss carrier could not act freely despite its claim of ownership on this property.

**NETWORK NEWS** **CROSSAIR EUROPE** (QE) has started integrating two Saab 2000 (HB-IZI & IZJ) which are handed over by SWISS in June 2004. A temporary solution has been agreed on by both carriers concerning aircraft availability of the same type for the time prior to June 30 as both remaining Saab 340B are about to be leased to Carpatair based at Timisoara (Romania).

Starting with the beginning of the Summer schedule 2004 on March 28, most SWISS flights out of Euroairport are operated with an all-Saab 2000 fleet, except those to Manchester (Embraer 145) and London Heathrow (A320).

**However, QE** will be limited to two Saab 2000 only. The restriction has been stipulated by Aeropers (Swissair) and SWISS Pilots (Crossair) who will oppose any third party wet-lease deal for plain personal reasons. If QE were to be allowed to take over all 50-seater planes (Saab 2000/Embraer 145) and Jumbolinos from SWISS, operating costs could be dramatically lowered as its overhead costs are considered to be remarkably better.

But again, as in the past, Aeropers has often successfully intervened at the top in order to secure its royal benefits over company interests.

**AIR FRANCE** has reduced flights to Clermont-Ferrand to a daily evening service and has stopped serving Marseille again. **TWIN JET** commenced flying to Marseille twice a day (Beech 1900), instead.

**AIR ALGERIE** has changed its year-round departure to Constantine from Thursday to Sunday and will add three flights to Annaba (1x) and Constantine (2x) at the end of June. Also, **AIGLE AZUR** has announced a third departure (Wednesday) to Constantine starting at the end of June

### SUMMER CHARTER PROGRAM - a closer look at the changes

The most striking difference to the Summer of the year 2003 is the absence of flights to Caribbean holiday resorts such as La Romana, Puerto Plata and Punta Cana in the Dominican Republic. The only remaining long-distance flights are African Safari's twice weekly club charters to Mombasa with a history of more than 34 years.

Still, the Summer 2004 is offering a broad range of destinations in Mediterranean, Western-Atlantic and North African regions which are serviced by about 2200 charter flights taking to the skies from from April thru October, averaging at about 88 departures a week.

Capacity contracted for this season is at about 364'000 passenger seats. Regional market leaders such as Starter Voyages (97'000) and TUI (80'000) remain at last year's standing while FTI (50'000) and Etapes Nouvelles (36'000) have increased their destination portfolio and market presence in the tri-national catchment area.

FTI's decision to reconsider its original intentions to pull out of the tour operating market taking full commercial risk of aircraft capacity is directly connected to a change of directions brought about by an ownership and management reshuffle.

Additional seat capacity is being offered by Marmara Group (20'000), Magic Holidays (16'600), Hotelplan/ESCO (16'200), MAXI Tours (15'000), Universal (9'200), African Safari Club (9'200), Tourivac (5'800), Thomas Cook (5'040) and Club-Med (4'700).

# **Charter Summer 2004**

| DESTINATION         | DAY | TOUR OPERATOR       | LAUNCHING DATE    | CARRIER           | AIRCRAFT | TOTAL FLIGHTS | TOTAL # OF SEATS |
|---------------------|-----|---------------------|-------------------|-------------------|----------|---------------|------------------|
| EGYPT/ASSUAN        | 2   | Etapes Nouvelles    | 30.03.04-25.04.04 | LOTUS AIR         | A319     | 10            | 1400             |
|                     | 5   | Etapes Nouvelles    | 14.09.04-26.10.04 | LOUTS AIR         | A319     | 6             | 840              |
| HURGHADA            | 5   | Etapes Nouvelles    | 02.04.04-28.05.04 | LOTUS AIR         | A319     | 8             | 1120             |
|                     |     |                     | 17.09.04-22.10.04 | LOTUS AIR         | A319     | 6             | 840              |
| LUXOR               | 6   | Starter             | 01.05.04-23.10.04 | AIR MEMPHIS       | A320     | 24            | 4320             |
|                     | 6   | FTI Touristik AG    | 03.07.04-30.10.04 | SWISS SUN         | A320     | 16            | 2720             |
| BULGARIA/VARNA      | 6   | Etapes Nouvelles    | 05.06.04-11.09.04 | LOTUS AIR         | A319     | 14            | 1960             |
|                     | 7   | Etapes Nouvelles    | 04.04.04-30.10.04 | LOTUS AIR         | A319     | 16            | 2240             |
| GREECE/ATHENS       | 6   | Starter             | 01.05.04-18.09.04 | AIR VIA           | TU-154   | 23            | 3450             |
|                     | 6   | Starter             | 17.04.04-09.10.04 | SPANAIR           | MD-83    | 23            | 3910             |
| CORFU               | 6   | Etapes Nouvelles    | 03.04.04-23.10.04 | AEGEAN CRONUS     | B737-400 | 28            | 4760             |
|                     | 2   | Starter             | 20.04.04-12.10.04 | IBERWORLD         | A320     | 24            | 4320             |
| KOS                 | 5   | FTI Touristik AG    | 21.05.04-08.10.04 | SWISS SUN         | A320     | 18            | 3060             |
|                     | 4   | TUI                 | 06.05.04-21.10.04 | HAPAG LLOYD       | B737-800 | 23            | 4140             |
| RHODOS              | 7   | Hotelplan/Esco      | 16.05.04-17.10.04 | GERMANIA EXPRESS  | F100     | 20            | 2200             |
|                     | 2   | Starter             | 20.04.04-05.10.04 | IBERWORLD         | A320     | 23            | 4140             |
| HERAKLION           | 4   | TUI                 | 06.05.04-21.10.04 | HAPAG-LLOYD       | B737-800 | 23            | 4140             |
|                     | 7   | FTI Touristik AG    | 04.04.04-24.10.04 | SWISS SUN         | A320     | 28            | 4760             |
|                     | 1   | Starter             | 05.04.04-25.10.04 | IBERWORLD         | A320     | 28            | 5040             |
|                     | 1   | Starter             | 19.04.04-01.10.04 | TRANSAVIA         | B737-800 | 23            | 4140             |
|                     | 4   | FTI Touristik AG    | 08.07.04-28.10.04 | SWISS SUN         | A320     | 16            | 2720             |
|                     | 5   | TUI                 | 30.04.04-29.10.04 | HAPAG LLOYD       | B737-800 | 24            | 4320             |
|                     | 6   | Starter             | 24.04.04-09.10.04 | TRANSAVIA         | B737-800 | 23            | 4140             |
|                     | 6   | Etapes Nouvelles    | 03.04.04-23.10.04 | AEGEAN CRONUS     | B737-400 | 28            | 4760             |
| ITALY/LAMEZIA TERME | 7   | FTI Touristik AG    | 04.04.04-24.10.04 | SWISS SUN         | A320     | 28            | 4760             |
|                     | 7   | FTI Touristik AG    | 09.05.04-31.10.04 | GERMANIA EXPRESS  | F100     | 24            | 2640             |
| CATANIA             | 5   | Starter             | 09.04.04-01.10.04 | AIR MEDITERRANEE  | B737-500 | 24            | 3360             |
| PALERMO             | 5   | Starter             | 16.04.04-01.10.04 | IBERWORLD         | A320     | 22            | 3960             |
| KENYA/MOMBASA       | 5   | African Safari Club | 02.04.04-29.10.04 | ASA               | A310     | 28            | 6440             |
|                     | 7   | African Safari Club | 30.07.04-29.10.04 | ASA               | A310     | 12            | 2760             |
| CROATIA/RIJEKA      | 1   | Tourivac            | 12.07.04-22.08.04 | AIR ADRIATIC      | MD-83    | 6             | 1020             |
| MALTA               | 6   | FTI Touristik AG    | 03.04.04-23.10.04 | SWISS SUN         | A320     | 27            | 4590             |
|                     | 6   | Starter             | 17.04.04-02.10.04 | AIR MALTA         | A319     | 23            | 3220             |
| MAROC/AGADIR        | 1   | Etapes Nouvelles    | 05.04.04-25.10.04 | ROYAL AIR MAROC   | B737-500 | 28            | 3920             |
| MARRAKECH           | 6   | Starter             | 26.06.04-23.10.04 | ROYAL AIR MAROC   | B737-500 | 17            | 2380             |
|                     | 1   | Etapes Nouvelles    | 05.04.04-25.10.04 | ROYAL AIR MAROC   | B737-500 | 28            | 3920             |
| PORTUGAL/FARO       | 6   | Starter             | 03.04.04-19.06.04 | ROYAL AIR MAROC   | B737-500 | 10            | 1400             |
|                     | 3   | TUI                 | 07.04.04-13.10.04 | HAPAG LLOYD       | B737-800 | 26            | 4680             |
| FUNCHAL             | 3   | Starter             | 07.04.04-27.10.04 | IBERWORLD         | A320     | 28            | 5040             |
| SPAIN/MALAGA        | 7   | Starter             | 04.04.04-31.10.04 | IBERWORLD         | A320     | 28            | 5040             |
| SANTIAGO DE COMP.   | 6   | Benitez Reisen      | 26.06.04-07.08.04 | SWISS             | ERJ145   | 6             | 300              |
| IBIZA               | 5   | Starter             | 07.05.04-01.10.04 | IBERWORLD         | A320     | 20            | 3600             |
| MAHON               | 6   | TUI                 | 01.05.04-23.10.04 | HAPAG LLOYD       | B737-800 | 23            | 4140             |
|                     | 7   | TUI                 | 23.05.04-10.10.04 | HAPAG LLOYD       | B737-800 | 16            | 2880             |
| PALMA DE MALLORCA   | 3   | Starter             | 07.07.04-25.08.04 | IBERWORLD         | A320     | 8             | 1440             |
|                     | 3   | TUI                 | 07.04.04-27.10.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
|                     | 5   | TUI                 | 07.04.04-27.10.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
|                     | 5   | Starter             | 07.05.04-29.10.04 | IBERWORLD         | A320     | 24            | 4320             |
|                     | 6   | Starter             | 10.04.04-23.10.04 | IBERWORLD         | A320     | 26            | 4680             |
|                     | 6   | Starter             | 10.04.04-09.10.04 | SPANAIR           | MD-83    | 25            | 4250             |
|                     | 6   | TUI                 | 03.04.04-30.10.04 | HAPAG LLOYD       | B737-80  | 28            | 5040             |
|                     | 7   | Hotelplan/Esco      | 15.05.04-16.10.04 | GERMANIA EXPRESS  | F100     | 20            | 2200             |
|                     | 7   | FTI Touristik AG    | 04.04.04-24.10.04 | SWISS SUN         | A320     | 28            | 4760             |
|                     | 7   | TUI                 | 04.04.04-31.10.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
|                     | 7   | Universal           | 30.03.04-26.10.04 | SPANAIR           | MD-83    | 28            | 4760             |
|                     | 7   | Universal           | 30.03.04-26.10.04 | AIR EUROPA        | B737-300 | 28            | 4480             |
| ARRECIVE (ACE)      | 2   | TUI                 | 30.03.04-26.10.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
| FUERTEVENTURA (FUE) | 4   | Starter             | 06.05.04-28.10.04 | IBERWORLD         | A320     | 28            | 5040             |
|                     | 1   | TUI                 | 29.03.04-25.10.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
| ACE/FUE (COMBINED)  | 4   | Starter             | 01.04.04-25.10.04 | IBERWORLD         | A320     | 28            | 5040             |
| LAS PALMAS          | 6   | Starter             | 03.05.04-25.10.04 | IBERWORLD         | A320     | 28            | 5040             |
| TENERIFFA           | 7   | TUI                 | 01.05.04-06.11.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
|                     | 4   | TUI                 | 02.05.04-31.10.04 | HAPAG LLOYD       | B737-800 | 28            | 5040             |
| TUNISIA/DJERBA      | 6   | Starter             | 06.05.04-28.10.04 | IBERWORLD         | A320     | 28            | 5040             |
|                     | 1   | FTI Touristik AG    | 05.04.04-25.10.04 | SWISS SUN         | A320     | 28            | 4760             |
|                     | 1   | Starter             | 03.05.04-01.11.04 | KARTHAGO AIRLINES | A320     | 24            | 4320             |
|                     | 6   | Etapes Nouvelles    | 03.04.04-30.10.04 | NOUVELAIR         | A320     | 28            | 5040             |
| MONASTIR            | 6   | Hotelplan/ESCO      | 03.04.04-06.11.04 | TUNIS AIR         | B737-500 | 28            | 3920             |
|                     | 6   | Tourivac            | 03.04.04-06.11.04 | TUNIS AIR         | B737-500 | 28            | 3920             |
|                     | 1   | FTI Touristik AG    | 05.04.04-25.10.04 | SWISS SUN         | A320     | 28            | 4760             |
|                     | 3   | Starter             | 07.07.04-01.09.04 | TUNIS AIR         | A319     | 10            | 1400             |
|                     | 6   | Starter             | 03.04.04-30.10.04 | TUNIS AIR         | A319     | 28            | 3920             |
|                     | 6   | Etapes Nouvelles    | 03.04.04-30.10.04 | NOUVELAIR         | A320     | 28            | 5040             |
|                     | 6   | Hotelplan/ESCO      | 22.05.04-23.10.04 | TUNIS AIR         | B737-500 | 20            | 2800             |
|                     | 7   | Club Med-Jet Tours  | 18.04.04-31.10.04 | TUNIS AIR         | A320     | 26            | 4680             |
| TUNIS               | 7   | Tourivac            | 25.07.04-22.08.04 | AIR MEDITERRANEE  | B737-500 | 6             | 840              |
| TURKEY/ANKARA       | 5   | Magic Holiday AG    | 18.06.04-17.10.04 | MNG AIRLINES      | B737-400 | 16            | 2720             |
| ANTALYA             | 1   | MAXI                | 29.03.04-25.10.04 | ONUR AIR          | A321     | 28            | 5600             |
|                     | 2   | TUI                 | 04.05.04-26.10.04 | SUN EXPRESS       | B737-800 | 24            | 4320             |
|                     | 4   | MAXI                | 17.06.04-29.10.04 | ONUR AIR          | A320     | 12            | 2160             |
|                     | 5   | Thomas Cook         | 02.04.04-29.10.04 | SUN EXPRESS       | B737-800 | 28            | 5040             |
|                     | 5   | FTI Touristik AG    | 02.04.04-29.10.04 | SWISS SUN         | A320     | 28            | 4760             |
|                     | 5   | TUI                 | 02.04.04-29.10.04 | SUN EXPRESS       | B737-800 | 28            | 5040             |
|                     | 5   | Groupe Marmara      | 02.04.04-29.10.04 | ONUR AIR          | A320     | 28            | 5040             |
| ISTANBUL            | 5   | Magic Holiday AG    | 07.05.04-29.10.04 | MNG AIRLINES      | B737-400 | 24            | 4080             |
|                     | 4   | Groupe Marmara      | 01.04.04-28.10.04 | PEGASUS           | B737-400 | 28            | 4760             |
|                     | 5   | Magic Holiday AG    | 02.04.04-29.10.04 | ONUR AIR          | A320     | 28            | 5040             |
|                     | 7   | Groupe Marmara      | 04.04.04-31.10.04 | PEGASUS           | B737-400 | 28            | 4760             |
| IZMIR               | 4   | MAXI                | 17.06.04-19.09.04 | ONUR AIR          | A320     | 10            | 1800             |
|                     | 5   | Groupe Marmara      | 02.04.04-29.10.04 | PEGASUS           | B737-400 | 28            | 4760             |
|                     | 5   | Magic Holiday AG    | 02.04.04-29.10.04 | MNG AIRLINES      | B737-400 | 28            | 4760             |
|                     | 5   | MAXI                | 02.04.04-29.10.04 | ONUR AIR          | A320     | 28            | 5040             |
| CYPRUS/LARNACA      | 6   | Hotelplan/ESCO      | 03.04.04-30.10.04 | EUROCYPRIA        | A320     | 28            | 5040             |
|                     | 6   | FTI Touristik AG    | 03.04.04-30.10.04 | SWISS SUN         | A320     | 28            | 4760             |

Subject to change