Editorial

Dear Reader,

Based on the Zurich Airport Sectoral Aviation Infrastructure Plan (SAIP) and the safety review of Zurich Airport, Flughafen Zürich AG has applied to the Federal Office of Civil Aviation (FOCA) to amend its operating regulations. The focus is on separating take-off and landing routes in the East Concept. This issue of our Political Newsletter provides more detailed information about the changes to our operating regulations.

In its aviation policy report, the Swiss Confederation describes a hub in Zurich as an efficient means of ensuring that Switzerland is connected to the world’s leading economic centres. In an increasingly globalised world, direct connections are of paramount importance to Switzerland’s export-led economy. Heinz Karrer, President of the Swiss Business Federation economiesuisse, presents this persuasive argument in his guest column. A certain number of transfer passengers are essential if the home carrier SWISS is to be able to optimise seat occupancy on the attractive network of short, medium and long-haul flights and, in particular, so that it can operate long-haul flights profitably. This Political Newsletter rounds off with more detailed information about Zurich Airport’s role as a hub and the issue of bird strikes.

On a more personal note, after seven years as the CEO of Zurich Airport, I have decided on a change of career and will be stepping down from the helm at Flughafen Zürich AG with effect from 1 January 2015. During my time here, I have overseen the opening of the upgraded Dock B, the new security check building, the state-of-the-art noise protection hangar for idling aircraft, a new freight dispatch hall and arrival duty free shops in Arrivals 1 and 2. The “Circle” is now taking shape as an actual construction project. We also welcome the outcome of the referendum held on 27 November 2011, in which voters in the Canton of Zurich considerably rejected Municipal Initiative II, demonstrating their clear opposition to a ban on runway expansion and their support for the moderate, demand-led development of Zurich Airport. To ensure that the public can always decide on planned runway changes in future, a committee under the auspices of the “Pro Flughafen” (Pro Airport) association has launched a cantonal people’s initiative. You will find more information and arguments about this on the following pages.

I am delighted that the Board of Directors has appointed our Chief Commercial Officer as my successor and wish Stephan Widrig all the very best and every success in his new function. My thanks to you, the readers of the Political Newsletter, for your interest in Zurich Airport. I hope you enjoy this issue.

Thomas E. Kern, Chief Executive Officer
2014 Operating Regulations

Based on the Zurich Airport Sectoral Aviation Infrastructure Plan (SAIP) dated 23 June 2013 and the report on the safety review of Zurich Airport, Flughafen Zürich AG has applied to amend its operating regulations. Aside from a number of minor amendments, mainly to the wording, the main change to the 2014 Operating Regulations (BR2014) is the separation of take-off and approach routes in the East Concept. As is currently the case, the East Concept comes into play in strong westerly winds or during German curfew hours from 21:00 (20:00 at weekends). The route changes help to greatly improve the safety margin for flight operations at Zurich Airport. At the same time, the additional changes – in particular the amendment to the flight level 80 rule – will reduce the number of people affected by noise under both the Noise Abatement Ordinance and the Zurich Aircraft Noise Index.

The primary purpose of operating regulations is to regulate flight operations at the airport and define which flight procedures and operating concepts are followed, and when. The provisional operating regulations have been in force at Zurich Airport since 30 June 2011. Flughafen Zürich AG submitted the regulations to the Federal Office of Civil Aviation (FOCA) for approval at the end of 2003. Those regulations chiefly describe the changes to flight operations that had to be gradually introduced in response to unilateral restrictions imposed by Germany. Myriad complaints made it impossible to complete this process any earlier.

Basis for changes to the operating regulations

After years of consultations, when it partially implemented the Zurich Airport Plan in response to SAIP, the Swiss Confederation paved the way for the operating regulations at Zurich Airport in its spatial planning policy. The Plan chiefly comprises safety measures recommended in the February 2013 report on the safety review of Zurich Airport. Based on these findings and the requirements of SAIP, Flughafen Zürich AG drafted an amendment to the operating regulations (BR2014) and submitted it to the FOCA in October 2013. Between 20 October 2014 and 18 November 2014, the FOCA published the BR2014 in the cantons and municipalities affected.

Separation of take-off and approach routes in the East Concept

The key feature of BR2014 is the separation of take-off and approach routes in the East Concept. The safety review of Zurich Airport revealed that the current East Concept (chart 1), with take-off and approach routes which cross over at multiple points, is very complex and consequently has a relatively low safety mar-
gin. Under the BR2014, take-off routes will mainly head south and approach routes will only head east and north of the airport. This will avoid the current intersection points between aircraft that are taking off and landing and simplify the display on the air traffic controllers’ radar screens, as there will no longer be aircraft flying over one another (chart 2).

**Flight level 80 rule to be adapted**
The so-called flight level 80 rule (FL80-rule) is also to be adapted. This rule was introduced in 2011 for noise abatement reasons. Under the rule, aircraft taking off from 22:00 onwards must be routed on the published route up to a height of 8000 feet (FL80 or approximately 2400 metres above sea level) instead of 5000 feet (approximately 1800 metres above sea level) during the day, to concentrate the noise. In practice, this meant that air traffic control instructed a greater number of departing aircraft heading east to fly on the “counter-clockwise” take-off route over densely populated areas and back over the airport in an eastern direction in a 270 degree turn. This was done in order to avoid aircraft crossing paths with aircraft approaching from the east. The special authorisation allowing aircraft that cross over during the night to be diverted from the published route at 5000 feet and guided in the direction of their destination was intended to minimise flights over densely populated areas. Thanks to this measure and because fewer aircraft fly over densely populated areas, noise levels can also be reduced in accordance with the noise limits and the Zurich Aircraft Noise Index ZFI.

**Fewer delays due to lowering of minimum height in the north**
For take-offs heading north, aircraft are currently required to reach a height of 3500 feet (around 1000 metres above sea level) 4 miles after take-off. Four-engine long-haul aircraft climb more slowly than two-engine planes, and do not usually reach this height. A special authorisation therefore applies for four-engine aircraft taking off on runway 34, but not on runway 32. After handling at Dock E, these aircraft must traverse the entire airport on their way to the runway, which takes them nearly ten minutes and involves crossing the active landing runway. These undesirable implications (crossing a runway, long taxiing times) can be eliminated if the same special authorisation is granted for take-offs on runway 32 (map 3). As an added benefit, it will reduce the taxiing time of the last aircraft departing in the evening by around five minutes and more of those aircraft will be airborne before 23:00. Flughafen Zürich AG hopes that this measure will not only improve safety by eliminating the need to cross the runway but will also lower the number of flights during the 23:00–23:30 time window and – because the limits for aircraft noise are particularly stringent at this time – thereby reduce the area affected by noise limit breaches.

**Chart 3.**

Length of RWY 34: 3700 m
Taxiing distance: 2200–2700 m

Length of RWY 32: 3300 m
Taxiing distance: 1000–1050 m

4 Intersections
“Give people the vote on runway modifications” initiative

On 3 October, a committee under the auspices of “Pro Flughafen” (pro airport) association launched the “Give people the vote on runway modifications” initiative. The initiative is seeking an amendment to the Airport Act to allow the public to always have the final say on airport matters.

When the airport was privatised in 2000, the Canton used the Airport Act to secure a right of veto and, by extension, consultation. In so doing, it also enables the population to continue influencing airport-related matters: in accordance with §19 of the Airport Act, the Canton’s Government Council issues directives to the state representatives on the Board of Directors on how to vote on resolutions to amend operating regulations that significantly affect exposure to aircraft noise and on changes to the location or length of the runways. The Cantonal Parliament approves directives concerning the approval of resolutions to alter runways in the form of a resolution subject to referendum. The Cantonal Parliament can therefore approve or reject the Government Council’s favourable directive. If the Cantonal Parliament approves the favourable directive, it may be put to a referendum, giving rise to a cantonal vote. If, however, the Cantonal Parliament rejects the directive, the public cannot vote on the issue of changes to the runway.

Giving the public more of a say
The initiative now proposes that directives of the Canton’s Government Council concerning changes to the runway must be approved or rejected in the form of a “resolution subject to referendum”. This ensures the public has a right of consultation, without weakening the Cantonal Parliament’s position.

Public support for the airport
Since 1946, when permission was granted to build an intercontinental airport in Kloten, the population of Zurich has facilitated and encouraged the successful development of Zurich Airport by expressing its support at the ballot box. This public backing has enabled Zurich Airport – under constant, critical scrutiny – to evolve into an economic engine for the region and one of Switzerland’s biggest employers. Given its history, Flughafen Zürich AG has every confidence that the public will continue voting in favour of the moderate development of its airport in the future and will therefore support the proposals in the initiative.

No specific runway project
It should be stressed at this juncture that the initiative is not a vote on a specific runway project. Changes to the runways won’t be necessary until the bilateral treaty on air traffic, which is currently on hold in Germany, is ratified or the Federal Republic of Germany unilaterally tightens the overflight regulations. If the initiative is adopted, Zurich’s voters can then vote on runway extensions in each specific case.

The signature collection period for the initiative, which was launched on 3 October, runs until the end of March 2015. Flughafen Zürich AG will continue to follow developments with keen interest. Further information can be downloaded at www.pieteninitiative.ch.
Our national airports are a key transport infrastructure

With around 45 million passengers and 621,000 tonnes of goods each year travelling to or from Switzerland by air, the three airports of Zurich, Geneva and Basel are undoubtedly facilities of national importance. Together with the airlines and airport-related businesses, they connect Switzerland to the main sales and procurement markets. In terms of value, more than one third of Swiss exports leave and one sixth of imports enter our country by air. One in every three overnight tourists travels to Switzerland by air.

For international companies with business activities in Switzerland, good flight connections are a crucial factor and accessibility is of great importance when settling down in our country. Being Switzerland’s biggest airport, Zurich airport plays a pivotal role in commercial and social exchange.

In a global economy which is becoming ever more closely intertwined, we cannot afford to lose this connection to the world. That’s why we must take care of our airport infrastructure and ensure that they can operate in a competitive environment. If Switzerland is to retain a demand-led aviation infrastructure that connects us with the world, we must preserve our infrastructural and operational scope for development.

Heinz Karrer
President economiesuisse
Bird strikes at Zurich Airport

Despite increasing efforts to prevent them, bird strikes pose a mounting threat to air traffic at Zurich Airport. Inevitably, this also increases the safety risks, the costs incurred by the airlines affected and inconvenience to passengers. Fortunately, bird strikes have not yet caused any serious accidents in Zurich. To ensure it stays that way, Flughafen Zürich AG will continue doing everything it can to reduce the number of bird strikes.

Bird strikes on aircraft are dangerous, unpleasant and costly. Flughafen Zürich AG has always tried to minimise this risk, which is why the airport site is designed to be as unappealing to large birds as possible. Grassy areas, for instance, are managed as high-grass meadows, making it difficult for birds to see their prey. Our specially hired mouser robs birds of prey of their food and petards and flashes of light are used to scare away any birds that do fly or perch close to the runways.

An expensive safety risk

Despite this, bird strikes cannot be prevented. On the contrary: the spread of nature and bird conservation areas and the continual ecological improvements to areas surrounding the airport have led to an increase in bird strikes in recent years. Each bird strike presents an immediate safety risk and incurs high repair and follow-up costs for the airlines. If a bird causes damage to individual blades of a jet engine, these have to be replaced immediately. Replacing just one blade costs up to CHF 50,000. What’s more, the aircraft is not available for its planned rotations, potentially causing cancellations to scheduled flights, further delays for passengers and high follow-up costs for the airline.

Hundreds affected

Bird strikes also cause uncertainty and delays for hundreds of passengers. When an aircraft is struck by a bird, the first the passengers know of it are the vibrations of a damaged jet engine which, for some people, can be distressing or even frightening. If the aircraft has to turn back, passengers experience severe delays, or may even have to wait until the next day before continuing their journey. This is also inconvenient for the airlines: with modern aircraft capable of carrying between 250 and 500 passengers, the added costs can quickly spiral to tens of thousands of francs. Flughafen Zürich AG will therefore continue doing everything it can to reduce the number of bird strikes.
Zurich Airport as a hub

In its Aviation Policy Report, the Federal Council conferred on Zurich Airport the role of maintaining a hub for direct connections to Europe and the major global centres, in order to meet the needs of the market. For Flughafen Zürich AG to be able to continue fulfilling this role, it must have competitive operating hours and infrastructures.

Good connections to the rest of the world are pivotal to an international and competitive economy – and are therefore vital for Switzerland as a business location. Daily, direct connections to economic centres are a must to accommodate the high mobility and flexibility needs of business travellers. The Swiss Confederation believes that operating a hub in Zurich is an efficient means of keeping Switzerland connected.

Transfer passengers enable us to offer a large number of routes.
A hub enables an airline to offer lots of connections with relatively few flights. Feeder flights bring passengers from several destinations to the hub, where they transfer to their connecting flight. This bundling of passenger flows allows for better and more constant seat occupancy on flights. Consequently, the airline can also offer routes from the hub for which there is demand on the local market but for which there are not enough local passengers to operate the flights profitably. This is why transfer passengers make it possible to offer such a large number of routes from Zurich.

Short transfer times are key
Attractive transfer connections are an important factor. As a hub airport, reliable baggage transport and a sophisticated passenger routing system enable quick transfers. At the same time, with closely matched arrival and departure times, the home carrier provides a swift transfer. This means that a large number of aircraft arrive at the airport within a short period, transfer passengers disperse onto their connecting flights and a large number of aircraft then leave Zurich (known as a “wave” system). In order that it can operate this system, Zurich Airport must have sufficient aircraft stands at peak times and a sufficiently high hourly capacity. Although there is no increase in the total number of flights, more aircraft can then take off and land at peak times and delays can be avoided or more quickly reduced.

Operating a hub relies on global coordination
So that air traffic can be handled efficiently and profitably using the wave system, arrival and departure times must be coordinated around the world. As well as accommodating demand for night flights and attractive times, the slots at airports right around the globe have to be coordinated. Consequently, many long-haul flights to eastern destinations cannot leave Zurich Airport until late in the evening and arrivals of night flights from the USA and Far East are scheduled for early in the morning. Therefore, in order to continue offering these routes at competitive prices, flight operators have no choice but to offer flights during fringe hours.

Airports must remain attractive to transfer passengers
Clearly, allowing airlines to operate a hub at Zurich Airport in compliance with the Aviation Policy Report presents a big challenge. In the interests of Switzerland and its economy, it is imperative to make competitive operating hours and an efficient infrastructure available to air traffic: only by also appealing to transfer passengers can the airport continue to offer the wide choice of routes demanded of it.
Traffic statistics

Passenger volumes at European airports in 2013
In 2013, around 72.4 million passengers used Europe’s largest airport, London-Heathrow. The increase in passenger volumes in London was above the average for other European airports. With very moderate growth, Zurich Airport remains in eleventh rank in Europe. The 12.2% extraordinary drop in passenger figures in Madrid is due to the persistent economic crisis and the weakening of the home carrier.

Passenger volumes at European airports in 2012 and 2013

Number of passengers (in millions)

Traffic trends at Zurich Airport in the first three quarters of 2014
19,388,989 passengers used Zurich Airport in the first three quarters of 2014, which corresponds to an increase of 1.9% compared with the same period last year. For the first time since 2011, the number of flight movements also rose slightly and is now 0.6% above the previous year’s figure.

There was also growth in freight: between January and September 2014, a total of 319,993 tonnes of freight were handled at Zurich Airport. This is a rise of 3.3% compared with the same period last year, whilst the share of airmail dropped significantly, by 5.9%.

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<thead>
<tr>
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<th>2014 January–September</th>
<th>2013 January–September</th>
<th>Change in % 2014 compared with 2013</th>
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<tr>
<td>Local passengers</td>
<td>13,384,921</td>
<td>12,688,369</td>
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<td>Transfer passengers</td>
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<td>Share of transfers</td>
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<td>33.0 %</td>
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<td>Total passengers 1</td>
<td>19,388,989</td>
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<tr>
<td>Flight movements</td>
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<tr>
<td>Freight (in tonnes)</td>
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<td>309,649</td>
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<tr>
<td>Mail (in tonnes)</td>
<td>24,846</td>
<td>26,398</td>
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1 incl. transit, general aviation and other
Source: Flughafen Zürich AG

Impressum
Redaktion: Flughafen Zürich AG
Druck: www.bmdruck.ch
© Flughafen Zürich AG Postfach, CH-8058 Zürich-Flughafen politikbrief@zurich-airport.com www.flughafen-zuerich.com