

Air and rail: competition or complementary use?

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Outline

- Presentation of ACI EUROPE
- ACI EUROPE and Intermodality
- Intermodality at airports

→ ACI EUROPE: Who are we?

- Our members
 - > 450 airports in 44 countries
 - > 180 World Business Partners
 - > 8 national associations
- The team
 - > Thematic Committees, supported by Task Forces



ACI EUROPE provides

- INFLUENCE
 - > Advocacy

- INTELLIGENCE
 - > Knowledge Sharing, Industry Standards, Benchmark

- INFORMATION
 - > Communications, Conferences & Exhibitions

ACI EUROPE and Intermodality

- 2009: ACI EUROPE a member of the European Commission's expert group on the revision of the TEN-T guidelines
- Official position for the airport industry formalised in March 2010
 - > Airports are intermodal nodes by nature
 - > Intermodality aims at seamless service quality, minimizing connecting times at the airport
- December 2011: Recommended practices in case of disruption of traffic
 - > Elaborated in cooperation with the Community of European Railways (CER).
 - > Main objective is to improve communications between a local airport and a local train station.

ACI EUROPE and Intermodality

- **Observatory on Airport Capacity: Working Group 3 “Intermodality”**
 - > Airport Regions Conference
 - > Association of European Airlines
 - > International Air Transport Association
 - > European Low Fare Airlines Association
 - > European Regions Airlines Association
 - > ACI EUROPE
 - > International Air Rail Organisation
 - > European Technology and Travel Services Association
 - > Transport Ministry from Germany, the UK, France, Portugal, Spain, the Netherlands and Sweden.

- *Ad hoc contributions*

- **Main deliverable: “An aviation stakeholder’s view on intermodality” (November 2013)**

ACI EUROPE and Intermodality

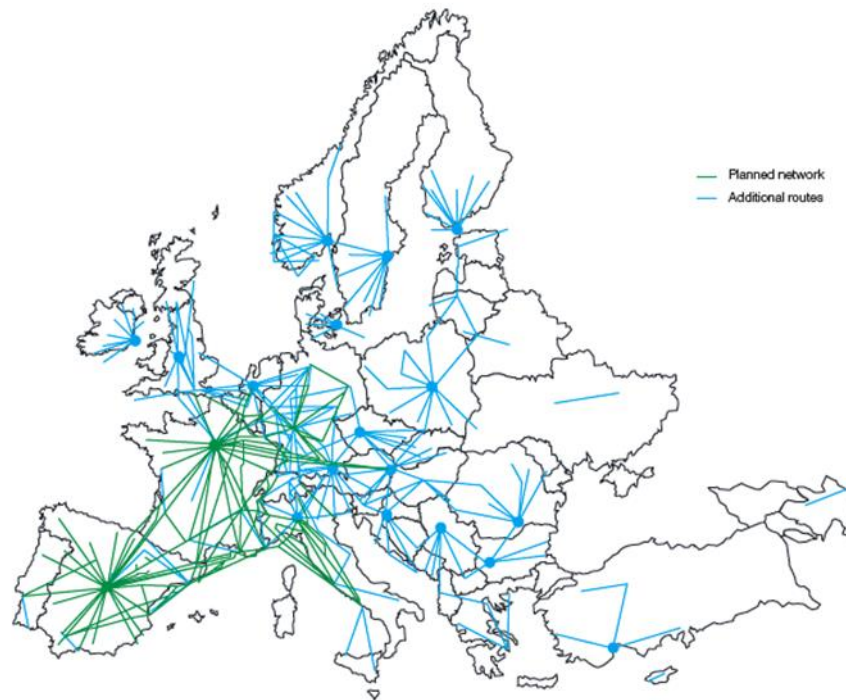
- Context: 50% growth in aviation in Europe by 2035 compared to 2012.
- Policy framework:
 - > 2011 White Paper on Transport
 - “Curbing mobility is not an option”.
 - > ACARE
 - European citizens are able to make informed mobility choices.
 - A coherent ground infrastructure is developed.
 - Flightpath 2050: 90% of travellers within Europe are able to complete their journey door-to-door within 4 hours.



Crucial role of aviation in general and regional airports

→ Intermodality at airports

Short-haul flights *versus* High-Speed rail?



High-speed rail network that would be required if the aim were to replace major short-haul airport pairs. Source: Eurocontrol

Intermodality at airports

- **Paradigm shift: intermodality creates mobility.**
- Intermodality: the coordinated/organised usage of more than one transport mode for a journey.
- Where does HST connection to airports add value?
 - > Airport size: size of the airport's catchment area and number of flights (especially long-haul).
 - > Geography: location of the airport relative to the route likely to be taken by a HST in the absence of the airport.
 - > Travel time: ability to compete with a flight journey time.

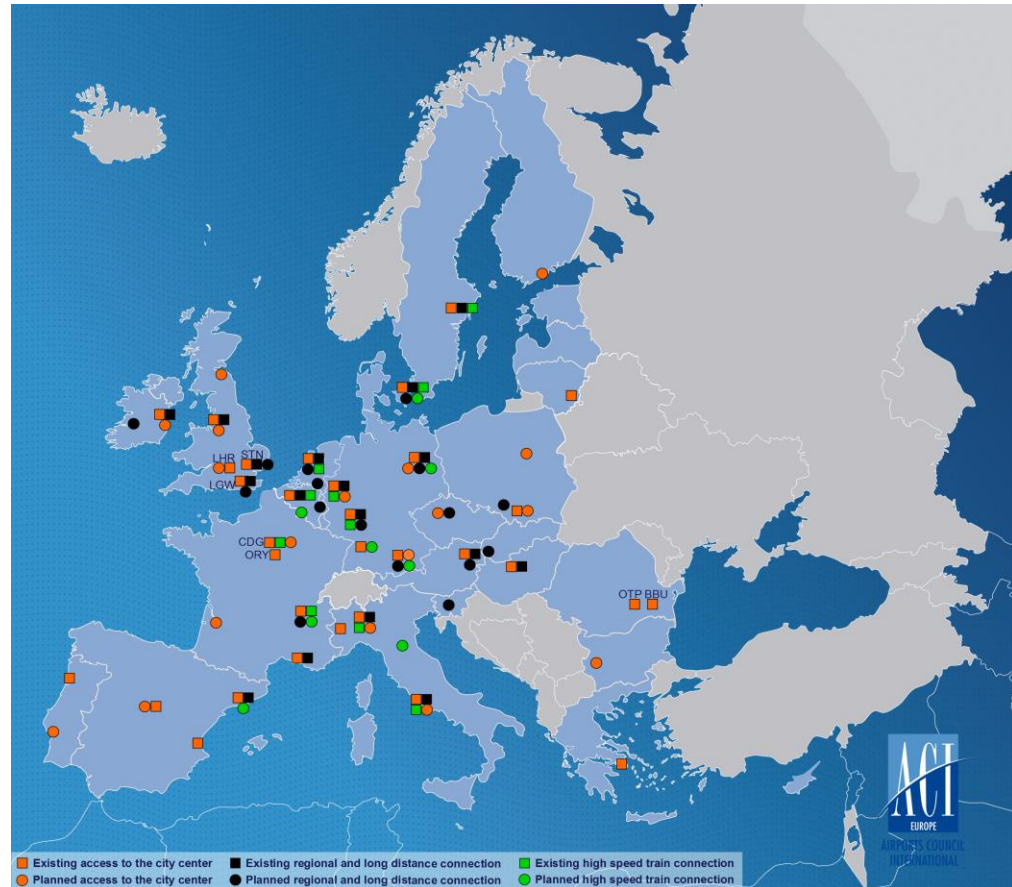


One size does not fit all!

→ Intermodality at airports

- What are the other intermodality options at airports?
 - > Conventional rail
 - > Urban rail access to city centre
 - > Non-rail urban transport

- What makes intermodality successful at airports?
 - > Physical integration of the modes
 - > Improving landside accessibility
 - > Check-in
 - > Integrated scheduling
 - > Integrated ticketing



Conclusions

- Air and rail cannot be considered as substitutes
- Intermodality is a key component to the airport industry:
 - > At congested airports, HST access can free some short-haul slots for long-haul slots.
 - > At non-congested airports, rail access can enlarge the catchment area and create new demand for air travel.
 - > In general, landside access to airports remains critical and should be addressed for improving passenger experience and limiting the environmental impact of the travelling public and workers.
 - > The choice of the intermodal solution will depend on local circumstances.



THANK YOU

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