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## **Brussels Airport.**

### **Once a hub, not anymore, what will it be ?**

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Brussels Airport is operated and managed by BIAC, a “company of public utility”, which is for 63 % in state shareholding, the remainder being subscribed by banks and institutional investors. Initial steps toward privatization have been taken and this may take place in the course of 2003, pending formal government approval.

The airport has two near-parallel runways and one slightly shorter runway for cross-wind conditions. It has one passenger terminal and two concourses, one for Schengen and one for non-Schengen destinations. There is also an airport zone dedicated specifically to cargo operations.

In 2002, Brussels Airport totalled 256.867 aircraft movements and 14,45 million passengers. The passenger decline – essentially due to the bankruptcy of Sabena in november 2001 – is to the largest extent due to the almost total disappearance of transfer traffic, whereas the small O & D decline can for the greater part be explained by general industry conditions. Cargo performance, however, is improving.

An analysis of year 2000 data on slots, passenger numbers and movements reveals that hubs need already big numbers of local market to become successful. The coming to maturity of the hub via its additional transfer depends on the presence of a large local carrier and – logically then as a consequence – the development of long-haul traffic. Since network success depends again on even larger numbers, it is the alliances and their policy that will determine the ultimate viability of a hub airport. But even in an alliance, the local (“flag” ?) carrier’s strength will be of prime importance.

The failure of Sabena had tremendous consequences on the airport and on the stakeholders there present. Transfer traffic disappeared overnight and some short-haul connections were temporarily broken. Immediately, surrounding hubs and their airlines pulled in feed traffic from Zaventem to their hub network with larger aircraft and/or increased frequency.

Today, Brussels Airport has recaptured most of its year 2001 destinations, but with often a decreased frequency and operated by a far larger number of (small) operators. This does not constitute a true transport network, as it does not allow for a true transfer system. And, except for the African network, the long-haul destinations from Sabena have not re-opened and in the light of the travel industry’s situation, these services have even declined further in offer.

The future strategy therefore holds a double approach: on the one hand vigorous development of the point-to-point quality of service (number of destinations and frequency) and on the other hand improvement of the transfer capability (agreements). On top of this, efforts to reconstitute and improve services to the more robust long-haul destinations are an element of the overall policy.