



THE IMPACT OF AN AIRPORT





METHODOLOGICAL APPROACH

The figures contained within this publication, unless otherwise stated, are based upon *'The Economic Impact of European Airports'* January 2015 report, produced by InterVISTAS and commissioned by ACI EUROPE.

In deriving these figures, InterVISTAS has followed an approach which has been based upon the following principles:

- Use of well-established and widely understood methodologies;
- Use of credible sources of hard economic data, with clear explanations where extrapolations are necessary;
- Avoidance of over-stating of figures, or over-interpretation of results, with an acknowledgement of significant counter-arguments where they exist;
- Making the methodology employed as transparent and accessible as possible, via the use of explanatory appendices.

For more detailed explanatory text outlining the methodology behind these figures, see the full report and supporting annexes, available on the ACI EUROPE website: www.aci-europe.org.

Cover image appears courtesy of Aéroports de Paris.

INTRODUCTION

After more than half a decade of crisis, retrenchment and stopgap measures, it can sometimes seem hard to be enthusiastic about the future. But ACI EUROPE, perhaps coming from a slightly different perspective, sees a very bright prospects for Europe's future, with airports and the wider aviation community playing a big part within the way forward.

Working within aviation and taking stock of the shift under way in the Global economy, it has become abundantly clear that air connectivity is one of the few tools Europe has, which can both build upon our inner strengths, but also project these same strengths out into the world.

Europe is among the most culturally diverse regions of the world, yet we are tightly bound by political and economic links, to say nothing of shared values, perspectives and experiences. This unity in diversity is a huge and very real potential economic strength, offering a possibility for innovation, creativity and collaboration. These are exactly the skills which will be needed in a century where change is happening at an ever faster rate – yet where at the same time more traditional sources of economic growth have not kept up.

But to work together to develop these new European ideas and concepts, we need to be connected to each other. European airports and the wider air transport sector deliver this connectivity in a very tangible and real way.

All of our cooperation and innovation will be for nothing, if we are only talking to ourselves. We can be as creative as we want, but to translate this into jobs and improvements in our quality of life, we need to take what we have created, to the wider world. There are broad swathes of the globe which are set for, or are mid-way through, the wave of growth that Europe itself has surfed until recent times. This represents millions if not billions of people who will trade with Europe, invest in Europe, visit Europe, and ultimately experience the best that Europe has to offer.

However, to tap into this growth – and, let's not forget, to be a part of it- we need to be well connected with these people. Airports and air connections are the means to do this.

This requires the right policies – aimed at preserving and boosting air connectivity. As part of that, there is undoubtedly a need to better understand how the European economy

and its airports interact. That is why ACI EUROPE commissioned InterVISTAS to conduct an extensive study on the *Economic Impact of European Airports*. This publication provides a synopsis of the main findings.

This work also compliments recent work by ACI EUROPE to better understand Europe's global position in terms of air connectivity. That resulted in the publication of our '*Airport Industry Connectivity Report*', in June 2014.

We hope you find this document useful, and that it ignites in you the same sense of optimism, as it has in us.



Olivier Jankovec
Director General
ACI EUROPE

The publication summarises a study completed by InterVISTAS in January 2015. Commissioned by ACI EUROPE, the study uses reliable and recognised data sources, in combination with established quantitative techniques, to put figures on the economic impact of European airports and associated economic activity.

The publication aims to focus as much on explaining the methodology used, rather than just the end results. This publication summarises the key findings only. If you are interested in exactly how the figures were derived, you can check out the full study and its accompanying annexes on the ACI EUROPE website: www.aci-europe.org.

THE TOTAL ECONOMIC IMPACT OF EUROPEAN AIRPORTS

The total economic impact of European airports is comprised of their **catalytic, induced, indirect and direct economic impacts**. Each of these is detailed in the following sections.

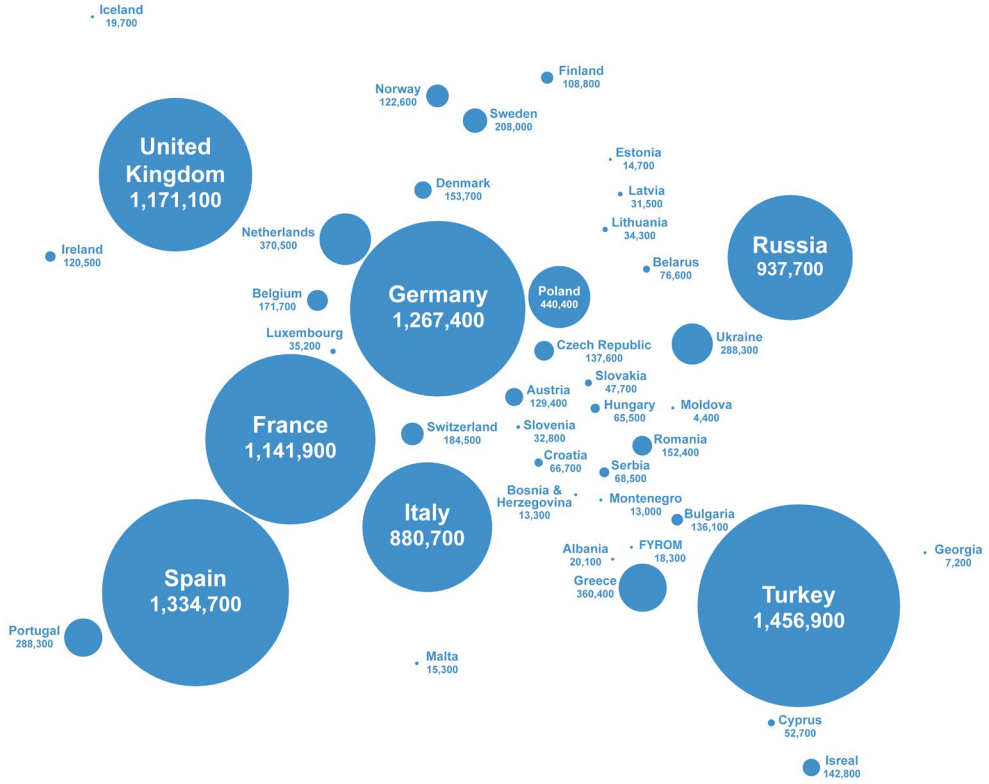
■ Jobs and GDP Associated with Total Economic Impact of European Airports

Region	Direct Jobs	GDP (€ Billions)	% of National GDP
EU 28	8,970,000	541.4	4.1%
EFTA	326,800	38.0	4.3%
Other Countries	3,047,100	95.1	3.6%
Total Europe	12,343,900	674.5	4.1%

On the next page you can see the total economic impact of European airports, expressed in terms of the number of jobs associated with the industry in each country. For more detailed country specific information on the total economic impact of European airports, including GDP data, check out Annex 1 at the back of this publication (pages 24 & 25).



■ Map of Job Numbers Associated with Total Impact of European Airports



THE CATALYTIC ECONOMIC IMPACT OF EUROPEAN AIRPORTS

The Numbers

What sets airports and associated aviation activities apart from most other sectors is their ability to facilitate and generate wider economic activities, which boosts overall national economic performance. Countries with better air connections tend to benefit from increased trade, higher investment, more tourism activity and better productivity overall. These positive effects are known as the 'catalytic impacts' of airports.

In fact, for every **10% increase in a country's air connectivity, GDP per person in that country increases by an additional 0.5%**. Or to put it more simply, the more air connectivity you have, the wealthier you are likely to be!

■ Jobs and GDP Catalytic Impact of European Airports

Region	Direct Jobs	GDP (€ Billions)	% of National GDP
EU 28	5,711,400	338.0	2.6%
EFTA	148,900	19.0	2.1%
Other Countries	2,033,200	69.7	2.6%
Total Europe	7,893,500	426.7	2.6%

On page 8 the number of jobs associated with catalytic impacts within individual countries are laid out. As you can see, results differ pretty significantly for individual countries. But even when country size is accounted for, airports play quite different roles within different countries. You can get a clearer idea of this from the table in Annex 2 (pages 26 & 27)

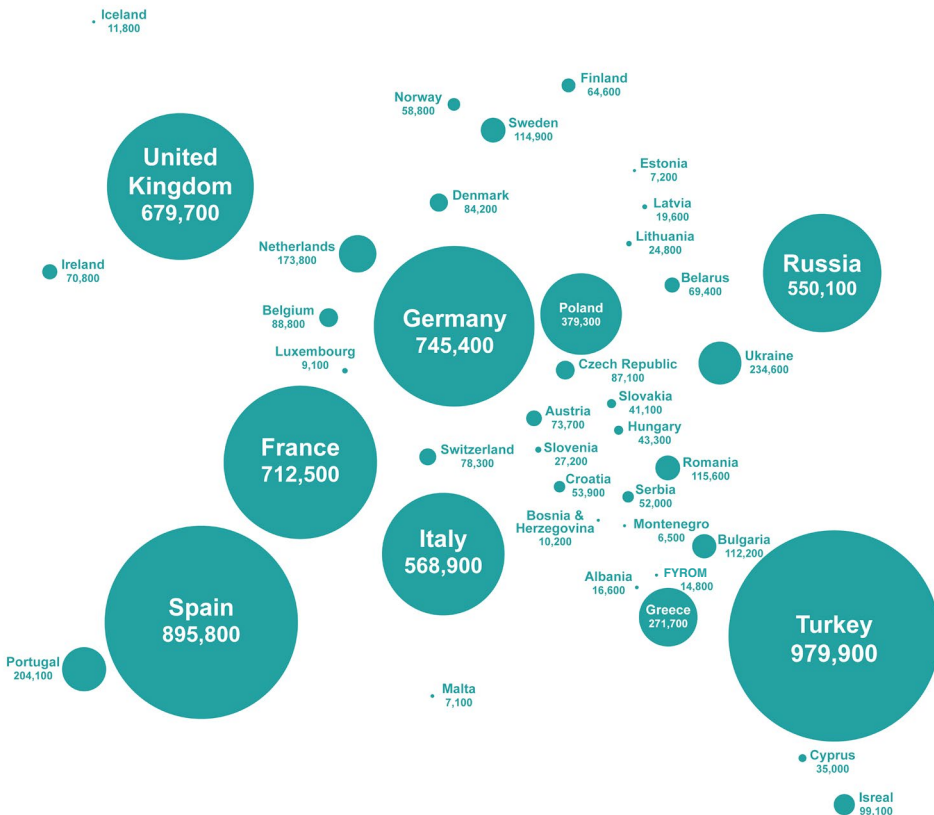
Each country has its own story to tell, but there are a few broad trends that affect countries to greater or lesser extents:

- **Islands and more remote countries** tend to have higher relative catalytic impacts – given the physical barriers of seas and oceans, or the sheer time and expense involved in accessing these areas via road or rail, air connections are crucial if these countries are to remain plugged into the global economy.

- **Countries with inbound tourism as a cornerstone of their economies** also tend to have higher relative catalytic impacts – only aviation offers the quick and affordable travel that underpins mass tourism in Europe. This effect is typically more obvious at ‘sun destinations’ countries within Europe.
- **The development of the aviation sector** within individual countries since its liberalisation also influences its relative importance to national GDP. Countries which enjoyed high growth in air connectivity as a result of new airline bases being established or increased hubbing activity for example, are likely to see the catalytic impacts of airports taking a relatively higher proportion of GDP.

The above factors can interact with each other in various ways, and allow a rough understanding of the broader trends influencing the varying levels of airport catalytic impacts. But of course the decisions that nations make and the policies they choose to pursue also play a significant role. It is no coincidence that Turkey – which sees aviation as a key strategic sector for its economy – tops the list. Putting in place the right policy environment, that allows airports to grow their traffic and global reach, will help ensure that air connectivity is having the maximum possible positive impact on wider economic growth.

■ Map of Job Numbers Associated with Catalytic Impact of European Airports



How Catalytic Impacts Work in Practice

The wider economic impacts, or 'catalytic impacts' of airports and associated aviation activity, are arguably their most important positive effect – they are certainly **the impacts that distinguish aviation from many other sectors**. However, they are definitely the least well understood. Aviation's contribution to wider economic growth can be thought of via **4 main channels**:

→ Trade

Everyone wins when countries trade. For example, the European Commission cite a report which estimates that the Transatlantic Trade and Investment Partnership free trade agreement, currently being negotiated between the EU and the US, will boost the parties' economies by €120 billion and €90 billion respectively, with the rest of the world benefiting to the tune of €100 billion¹.

How do airports fit into this? Well, in two key ways. Firstly, and most obviously, trade cannot happen without the goods being transferred between countries. About 35% of the value of total traded goods globally is transported via air. In many sectors, transport across long distances via rail, road or ship simply takes too much time.

Secondly, but no less importantly, airports and aviation play a key role facilitating the starting up of this trade in the first place. Would you do business with someone on the other side of the world who you'd never met? Aviation allows the face to face meetings necessary to build up solid commercial relationships.

→ Investment

Today investment in the EU is about -15% lower than 2007 levels², and this has been identified by the European Commission as one of the fundamental factors behind the EU's current economic malaise. Emerging economies and the EU's key trading partners offer a potentially massive source of foreign direct investment (FDI) to help counter this. FDI plays a crucial role, as it allows factories, offices, laboratories and workshops to be operated and staffed, which would simply not be in existence otherwise. Indeed, a bit like trade, investment rarely takes place if there is an absence of mutual trust and understanding between the players involved. Face-to-face meetings are a fundamental component in the development of these relationships. And here again aviation clearly plays a crucial role in facilitating this.

¹ *Reducing Transatlantic Barriers to Trade and Investment – An Economic Assessment*, Centre for Economic Policy Research, March 2013 – cited by European Commission at <http://ec.europa.eu/trade/policy/in-focus/ttip/>. Retrieved on 8 November 2014.

² *Communication from the Commission to the European Parliament, the Council, the European Central Bank, the European Economic and Social Committee, the Committee of the Regions and the European Investment Bank – An Investment Plan for Europe*, European Commission, November 2014, p. 4.

But aviation also plays an important role in supporting the ongoing work that follows the investment. The everyday activity of doing business means that there is often a steady stream between regional offices and company headquarters, or indeed other regional offices around the world, as companies shuttle personnel to share knowledge and ensure managerial oversight.

→ Tourism

Tourism plays a huge role in countless communities across Europe. The European Commission considers Europe to be the world’s number one tourist destination, and indeed the special role of the industry is even recognised in the Lisbon Treaty³. The sheer scale of the industry should not be underestimated – Europe welcomed 563.4 million international arriving tourists in 2013, with receipts of €368.4 billion, according to the United Nations⁴.

The activity generated by tourism, such as hotels, bars, restaurants and entertainment, are relatively labour-intensive, and often offer opportunities for workers with a diverse range of experiences and qualifications. This helps ensure that the impact of tourism is more widespread throughout the communities.

Air travel has made possible the age of mass affordable tourism in Europe as we know it. Be it for longer distance trips, or just for city breaks within Europe, the time involved in getting from A to B via any other transport mode would simply rule most such trips out, before the financial expense involved is even considered.

■ Top Ranking European Countries by international tourism and air connectivity

Ranking	International Tourism Ranking ⁵	Connectivity Ranking ⁶
1	Spain	Germany
2	France	United Kingdom
3	Italy	France
4	Germany	Spain
5	United Kingdom	Italy

³ *Treaty of Lisbon amending the Treaty on European Union and the Treaty establishing the European Community*, December 2007, Article 195.

⁴ *UNTWO Tourism Highlights 2014 Edition*, United Nations World Tourism Organisation, p. 4.

⁵ Based on International Tourist Receipts, 2013 US\$, *UNTWO Tourism Highlights 2014 Edition*, United Nations World Tourism Organisation.

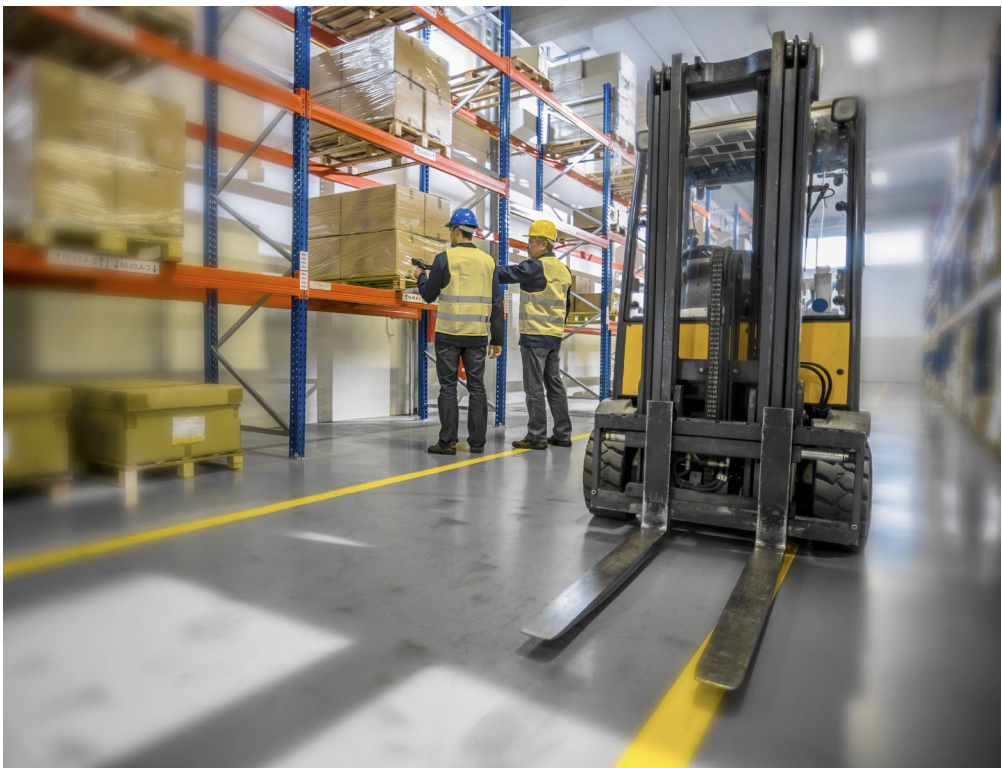
⁶ Based on Total Connectivity scores, from *'Airport Industry Connectivity Report'*, ACI EUROPE, June 2014.

→ Productivity

Productivity matters, a lot. In the long-run, the economic growth of a country is driven by increases in the productivity of its workers, and all the more so in the context of globalised competition. This could be finding more efficient ways of producing the same outputs, or it could be using innovation to create new technologies and products which did not exist before. Productivity increases are often a combination of both. In any case, the more productive you are, either as a country or an individual, the wealthier you ultimately become.

Increased aviation-associated productivity is in some ways an umbrella concept which encompasses the positive economic impact associated with trade and investment. Airports and their network of destinations reduce transport costs and increase destination options. At its most simplest, this increases the chances that the right workers are doing the right job at the right time, equipped with the right tools and the right qualifications – increasing their productivity and therefore their contribution to GDP.

As mentioned above, the InterVISTAS study has shown that for European countries every 10% increase in air connectivity is associated with a 0.5% increase in GDP per capita.





IT PAYS TO BE CONNECTED¹⁰

Airbus defines an 'Aviation Mega City' as one with at least 10,000 long haul passengers per day. Currently there are 42. By 2033 it is estimated that there will be 91 – they'll have more than 2.2 million long haul passengers a day. More than 95% of their long-haul traffic will be to, from or via other Aviation Mega Cities¹⁰.

It's quite an exclusive club, and one worth getting into – together these cities will account for **35%** of World GDP! Even today, average GDP per capita in these cities is 4 times the world average.

However, membership is not assured – mirroring EUROCONTROL's outlook, all of the EU's Aviation Mega Cities are classified as having a level of airport infrastructure which makes it impossible to meet demand. These Aviation Mega Cities are facing a severe airport capacity crunch in the next 20 years, which will result in significant lost opportunity. Decisive action to support airport expansion will be needed if Europe is to get the full benefit of its own Aviation Mega Cities.

¹⁰ 'Flying on Demand', Airbus Presentation, November 2014.

THE DIRECT, INDIRECT & INDUCED IMPACT OF EUROPEAN AIRPORTS

Airports are job-intensive locations. It takes people, and often a significant number of people, to check you in, to handle your baggage, to screen you at security checks, and to look after you on board the aircraft. And this says nothing about the people working in airport shopping, maintaining terminal facilities and aircraft, driving buses, and a range of other activities you will never even see. These are the **directly-employed staff**. And beyond the airport campus there is a longer supply-chain, hiring people who assembly aircraft, supply fuel, prepare inflight meals, and much more. These people are **indirectly-employed staff**.

And of course all these workers are spending their wages on goods and services, supporting even more jobs in turn. This is the **induced impact** of European airports and associated aviation activity.

Even if it's not right under your nose, your journey through the airport supports a huge amount of jobs, and the work that these people do, as well as the salaries they earn, are all a component of a country's GDP.

■ Jobs and GDP Direct, Indirect & Induced Impact of European Airports

Region	Jobs	GDP (€ Billions)	% of National GDP
EU 28	3,258,600	€ 203.4	1.6%
EFTA	177,900	€ 19.0	2.1%
Other	1,013,900	€ 25.4	1.0%
Total Europe	4,450,400	€ 247.8	1.5%

As with catalytic impacts, the direct, indirect and induced impacts of airports differ from country to country, even when country size is taken into account. Again, you can get a clear idea of the difference via the table in Annex 3 (pages 28 & 29), and particularly when looking at the range of different results within the '% of National GDP' column. But what's driving the difference?

At heart, the direct, indirect and induced GDP and job figures reflect the **relative strength of airports and wider aviation activities within individual countries**. The more aviation activity there is, the more jobs there are. This is in part associated with a country's reliance on aviation for integration with the global economy - so island and touristic countries are again well-represented.

Similarly, countries with extensive airline bases, for example, will tend to have more workers in the sector, and a correspondingly **higher impact on GDP**. Finally, countries which are more involved in some of the 'downstream' activities (anything from the supply of duty free goods to aircraft maintenance and repair) will tend to have a larger proportion of their economy associated with aviation.

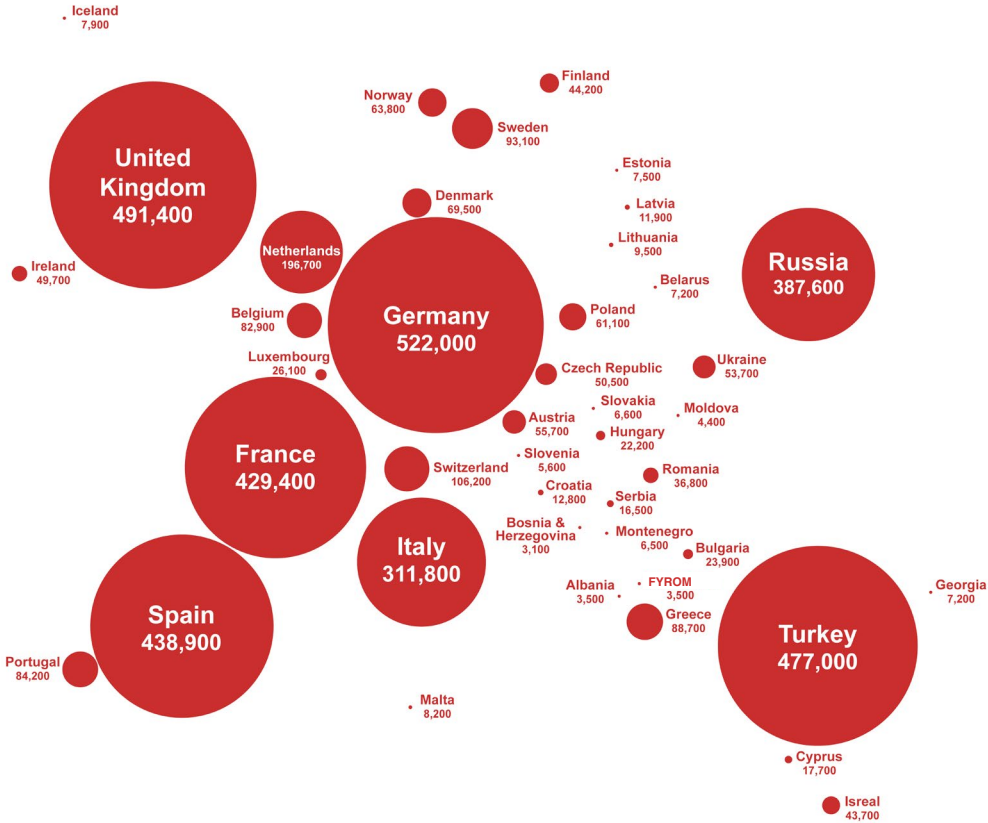
There is some nuance to this – a network of smaller airports will probably employ more workers compared to one larger airport with the equivalent number of passengers⁷. The same effect applies to the concentration of an airline's operation. Similarly, different types of airline business models require different levels of staffing⁸. So the nature of the aviation sector, and not just its size, determines the overall direct, indirect and induced impacts experienced by a country.



⁷ But of course that network will be providing air connectivity to a much wider geographical area!

⁸ See page 17 for more info on the relationship between airport size, airline operations and the numbers of direct jobs created.

Map of Jobs Associated with Direct, Indirect & Induced Impact of European Airports





NOT JUST FOR THE BIG BOYS¹¹

Air connectivity is not just the preserve of large multinational corporations. In fact more than 99% of European businesses are Small and Medium Enterprises (SMEs). They provide two thirds of all private jobs and are responsible for more than half the value add of the European economy¹².

International research commissioned by DHL found that the majority of SMEs expect to derive up to 50% of their revenues internationally by 2019. Just as well, as the work also found that SMEs that operated outside of their domestic G7 economies were more likely to have average annual growth of more than 10% over the previous 3 years. SMEs with a greater share of international revenue were more likely to be younger companies also.

And amongst the main barriers to doing business identified by SMEs, inadequate transport infrastructure is ranked in the top 3.

¹¹ 'Internationalization – a Driver for Business Performance', IHS, January 2014, and 'Breaking borders - From Canada to China, Barriers Overshadow Growth for Expanding SMEs' The Economist Intelligence Unit, 2014.

¹² 'Fact and figures about the EU's Small and Medium Enterprise (SME)', European Commission website – retrieved from http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/index_en.htm on 8 November 2014.

JOBS

What's Driving the Direct Jobs?

Airports and aviation-related activity create jobs – and facilitate a lot more. In fact the total number of jobs in Europe ultimately created and facilitated by airports is over **12.4 million**.

Looking at airports in terms of size, the study uncovered that **every 1000 passengers traveling through European airports is associated with on average 0.954 direct jobs**⁹. However, this depended upon the size of the airport in question, as well as the type of passengers going through the airport.

■ Airports, Traffic Types & the Direct Jobs They Create

Airport Size / Traffic Type	Impact on Direct Jobs
Airports with less than 1 million passengers per annum (mppa)	1000 extra passengers creates 1.2 direct jobs
Airports with 1-10 mppa	1000 extra passengers creates 0.95 direct jobs
Airports with more than 10 mppa	1000 extra passengers creates 0.85 direct jobs
Connecting passengers	Connecting passengers generate 3% less direct jobs than O/D passengers
Low Cost Carrier passengers (LCC)	LCC passengers generate 20% less direct jobs than non-LCC passengers

⁹ For ease of comprehension, the term 'traffic unit' and 'passenger' are used interchangeably in this section. A traffic unit consists of 1 passenger, or 100 kilograms of cargo. Also known as a 'Work Load Unit'.

These results make intuitive sense – **economies of scale** are significant in the airport environment, and **different airline business models and operations** require different numbers of workers on and around the airport campus. However, this is only part of the story – transfer passengers may also allow routes to be operated which would otherwise not be viable. This implies more supported jobs than would otherwise be the case. Similarly, Low Cost Carriers may require less staffing, but these airlines have unlocked growth and employment which otherwise would not have existed.

When considering these ratios, it’s important to remember that we’re talking about **direct employment at the airport** – this encompasses not just those employed by the airport itself, but also by the various companies working in and around the physical airport space. In the next section, we look at a breakdown as to who’s doing what, within this space.

What are the Direct Jobs?



What are the Direct Jobs Paying?

The InterVISTAS study also looks at average wage levels amongst employees directly employed in and around airports, as well as the wages of those indirectly employed (in the wider aviation supply chain) and finally the wages of those working within induced employment, who are supported by the spending of the direct and indirect employees.

	Direct Jobs	Indirect Jobs	Induced Jobs
Average Annual Wage	€ 40,400	€ 29,500	€ 27,400

The most important point to note is that the **average wage of direct employees is significantly higher than the average wage of those employed indirectly, or via induced employment**, which are much more in line with national average wage levels. In fact, in no country analysed were direct wages less than national averages. This tells us two things.

Firstly, there is a lot of **highly-skilled employees**, be it engineers, senior airport managers, pilots or others. These employees add significant value to the economy and are compensated accordingly. Airports are hubs for well-paying work which requires high skills and considerable training and qualifications.

Secondly, airports, while being environments with high-paying jobs, also offer a **diverse and varied range of job opportunities**. They therefore also provide a large number of employment opportunities for those with fewer or less recognised skills, and offer an **entry point into the labour market for many who might otherwise remain excluded**. In addition, many of these jobs, such as security screening or baggage handling, are required on-site, and so **cannot be exported to other economies with lower wage levels**. The direct, indirect and induced economic impact is therefore felt throughout the community, and not just reserved for the few.

See Annex 4 (pages 30 & 31), for the breakdown of average wages within each European country.



IT GOES BOTH WAYS

The argument is sometimes made that economic growth supports air connectivity growth rather than the other way around. This misses the point. Wider economic growth supports connectivity growth, but equally connectivity growth supports wider economic growth. It's a **virtuous circle** – both depend upon and reinforce each other.

For some empirical analysis of this two-way relationship, check out the work InterVISTAS undertook, in the full study.

ENSURING THE FUTURE ECONOMIC CONTRIBUTION OF EUROPE'S AIRPORTS

EUROCONTROL has been examining in recent years the issue of European airport capacity. Detailed quantitative work has confirmed that, in the absence of a significant additional expansion of airport infrastructure, Europe will face a 'capacity crunch' where around 225 million passengers will be unable to fly¹⁰.

Applying the economic impact methodology to EUROCONTROL's most likely 2035 forecast gives an estimated value of the associated lost GDP, as well as the number of potential jobs which would not be created.

■ Foregone Economic Impact in EUROCONTROL's Scenario C: Regulated Growth (Most Likely)

	Jobs	GDP (€ Billions)
Direct	313,000	14.3
Indirect	266,000	9.5
Induced	259,000	10.0
Catalytic	1,197,000	62.8
Total	2,035,000	96.7

The numbers are stark. Unless structural change is made, to allow airports to expand to cater for this future demand, **potential GDP to the value of almost €97 billion will be lost each year in Europe.** That equates **to losing out on the opportunity to create over 2 million jobs.**

¹⁰ *Challenges of Growth 2013: European Air Traffic in 2035*, EUROCONTROL, Brussels 2013.

CONCLUSION

Every year European airports and their associated aviation activity support **almost 12.4 million jobs** and contribute **€675 billion** towards Gross Domestic Product (GDP). That represents **4.1%** of the European economy.

But as we have seen, this contribution cannot be taken for granted. Even looking just at the loss of potential GDP and jobs associated with the looming airport capacity crunch, the numbers are significant. And these says nothing about the range of other impediments and threats to the growth of air connectivity within Europe.

Air connectivity offers a clear means of delivering jobs and income in both the short and longer term. But this air connectivity does not occur naturally – it has to be courted, initiated and fostered. Fortunately Europe has a commercialised and dynamic airport sector which is ready and eager to work with other aviation parties to deliver these new connections.

But **the policy climate needs to be right** for this work to be facilitated. Otherwise Europe risks losing out on connectivity and becoming increasingly bypassed as a global aviation hub. **Air connectivity needs to be actively promoted as one of the pillars of the EU's Growth and Job's Strategy.** This should cover, in an aligned way, a range of policy issues, but should in particular focus upon:

- **Airport Capacity**

Unless action is taken, Europe's top 20 airports will be fully congested by 2035. The economic impact of this will be huge, with €97 billion in lost GDP and 2 million jobs not created. **The EU needs a long-term strategic plan**, which is both ambitious and pragmatic, to ensure that airports are able to deliver this much needed additional capacity. This long term strategy plan should be **aligned with the Single European Sky** and should include **EU ground capacity targets**.

- **Air Traffic Liberalisation**

Precisely because Europe will not enjoy the economic growth that other regions of the world will experience, it is essential that we tap into these growth areas to remain globally relevant and connected. **EU-negotiated aviation agreements implementing open sky regimes with key trading partners** will be crucial in this respect.

- **Aviation Taxes**

Europe should at least not shoot itself in the foot. Aviation taxes may raise revenues in the short run, but these will come nowhere near to compensate for the resulting loss of connectivity. The experiences of countries such as the Netherlands, Denmark and Ireland made that clear. **Taxes should remain off the agenda**, and where they are in place, should be **swiftly removed**.

- **Operating Costs**

In a world of global competition, cost is a key selling point. Businesses know this, but they cannot control costs incurred by unnecessary red tape. Regulation has its place, but it should be **proportionate, fit for purpose, and streamlined**. Security - like in the US and many other parts of the World - is a public service and should be funded accordingly. At the very least, the aviation **security** regime should be reconsidered to make it **risk-based and more focused**, as presently done in the US.



ANNEX 1

Total Jobs and GDP Associated with European airports, by Country

Country	Jobs	GDP (€ Billions)	% of National GDP
Turkey	1,456,900	44.04	7.1%
Spain	1,334,700	60.33	5.9%
Germany	1,267,400	99.25	3.6%
United Kingdom	1,171,100	76.01	4.0%
France	1,141,900	81.60	4.0%
Russia	937,700	37.13	2.4%
Italy	880,700	56.69	3.6%
Poland	440,400	14.78	3.8%
Netherlands	370,500	27.20	4.5%
Greece	360,400	13.88	7.6%
Portugal	288,300	10.58	6.4%
Ukraine	288,300	3.09	2.4%
Sweden	208,000	18.21	4.3%
Switzerland	184,500	21.65	4.4%
Belgium	171,700	14.66	3.8%
Denmark	153,700	13.48	5.4%
Romania	152,400	4.72	3.3%
Israel	142,800	7.38	3.7%
Czech Republic	137,600	5.12	3.4%
Bulgaria	136,100	1.54	3.9%

Austria	129,400	10.92	3.5%
Norway	122,600	15.29	4.0%
Ireland	120,500	9.40	5.7%
Finland	108,800	8.13	4.2%
Belarus	76,600	1.53	3.3%
Serbia	68,500	1.01	3.1%
Croatia	66,700	1.94	4.5%
Hungary	65,500	1.56	1.6%
Cyprus	52,700	1.82	11.0%
Slovakia	47,700	2.22	3.1%
Luxembourg	35,200	3.37	7.4%
Lithuania	34,300	0.87	2.5%
Slovenia	32,800	1.25	3.5%
Latvia	31,500	0.77	3.3%
Albania	20,100	0.21	2.2%
Iceland	19,700	1.05	9.5%
FYROM	18,300	0.28	4.0%
Malta	15,300	0.66	9.2%
Estonia	14,700	0.41	2.2%
Bosnia & Herzegovina	13,300	0.19	1.6%
Montenegro	13,000	0.15	5.0%
Georgia	7,200	0.09	0.8%
Moldavia	4,400	0.05	1.0%
Total	12,343,900	674.52	4.1%



ANNEX 2

Jobs and GDP Associated with Catalytic Impacts of European Airports, by Country

Country	Jobs	GDP (€ Billions)	% of National GDP
Turkey	979,900	36.27	5.9%
Spain	895,800	39.65	3.9%
Germany	745,400	60.27	2.2%
France	712,500	51.14	2.5%
United Kingdom	679,700	41.53	2.2%
Italy	568,900	39.09	2.5%
Russia	550,100	22.67	1.4%
Poland	379,300	13.35	3.4%
Greece	271,700	9.94	5.5%
Ukraine	234,600	2.42	1.9%
Portugal	204,100	7.46	4.5%
Netherlands	173,800	13.7	2.3%
Romania	115,600	4.13	2.9%
Sweden	114,900	10.4	2.5%
Bulgaria	112,200	1.25	3.1%
Israel	99,100	5.49	2.7%
Belgium	88,800	8.95	2.3%
Czech Republic	87,100	3.24	2.2%
Denmark	84,200	7.59	3.0%

Switzerland	78,300	10.04	2.0%
Austria	73,700	6.93	2.2%
Ireland	70,800	4.89	3.0%
Belarus	69,400	1.44	3.1%
Finland	64,600	4.73	2.4%
Norway	58,800	8.33	2.2%
Croatia	53,900	1.65	3.8%
Serbia	52,000	0.8	2.5%
Hungary	43,300	1.04	1.1%
Slovakia	41,100	2.01	2.8%
Cyprus	35,000	1.18	7.1%
Slovenia	27,200	1.04	2.9%
Lithuania	24,800	0.66	1.9%
Latvia	19,600	0.52	2.2%
Albania	16,600	0.17	1.8%
FYROM	14,800	0.24	3.4%
Iceland	11,800	0.64	5.8%
Bosnia & Herzegovina	10,200	0.16	1.3%
Luxembourg	9,100	1.17	2.6%
Estonia	7,200	0.22	1.2%
Malta	7,100	0.29	4.1%
Montenegro	6,500	0.07	2.4%
Total	7,893,500	426.74	2.6%

ANNEX 3

Jobs and GDP Associated with Direct, Indirect and Induced Impacts of European Airports, by Country

Country	Total Jobs	Total GDP € Billions)	% of National GDP
Germany	522,000	38.99	1.4%
United Kingdom	491,400	34.49	1.8%
Turkey	477,000	7.77	1.3%
Spain	438,900	20.68	2.0%
France	429,400	30.46	1.5%
Russia	387,600	14.45	0.9%
Italy	311,800	17.59	1.1%
Netherlands	196,700	13.51	2.2%
Switzerland	106,200	11.62	2.4%
Sweden	93,100	7.81	1.9%
Greece	88,700	3.94	2.2%
Portugal	84,200	3.11	1.9%
Belgium	82,900	5.71	1.5%
Denmark	69,500	5.90	2.4%
Norway	63,800	6.96	1.8%
Poland	61,100	1.43	0.4%
Austria	55,700	3.99	1.3%
Ukraine	53,700	0.67	0.5%
Czech Republic	50,500	1.88	1.3%

Ireland	49,700	4.51	2.7%
Finland	44,200	3.41	1.8%
Israel	43,700	1.89	0.9%
Romania	36,800	0.59	0.4%
Luxembourg	26,100	2.19	4.8%
Bulgaria	23,900	0.29	0.7%
Hungary	22,200	0.52	0.5%
Cyprus	17,700	0.65	3.9%
Serbia	16,500	0.20	0.6%
Croatia	12,800	0.30	0.7%
Latvia	11,900	0.26	1.1%
Lithuania	9,500	0.20	0.6%
Malta	8,200	0.37	5.1%
Iceland	7,900	0.41	3.7%
Estonia	7,500	0.19	1.0%
Belarus	7,200	0.09	0.2%
Georgia	7,200	0.09	0.8%
Slovakia	6,600	0.21	0.3%
Montenegro	6,500	0.08	2.6%
Slovenia	5,600	0.21	0.6%
Moldova	4,400	0.05	1.0%
Albania	3,500	0.04	0.5%
FYROM	3,500	0.04	0.6%
Bosnia & Herzegovina	3,100	0.04	0.3%
Total	4,450,400	247.78	1.5%



ANNEX 4

Average Wages of Direct, Indirect & Induced Employment, in euros, by Country

Country	Direct	Indirect	Induced
Albania	9,500	5,800	4,100
Austria	50,300	43,800	37,000
Belarus	9,100	5,600	4,100
Belgium	48,500	43,100	39,300
Bosnia & Herzegovina	9,100	5,500	4,200
Bulgaria	9,300	5,700	4,100
Croatia	22,500	11,700	9,200
Cyprus	28,700	17,600	15,000
Czech Republic	27,400	15,700	14,300
Denmark	53,100	43,800	41,100
Estonia	17,900	13,500	11,500
Finland	55,700	43,000	41,000
France	51,700	46,400	40,900
FYROM	9,100	5,600	3,900
Georgia	9,000	5,600	4,100
Germany	47,900	37,100	35,500
Greece	31,400	21,700	17,400
Hungary	23,900	11,700	9,200
Iceland	33,800	29,400	27,700
Ireland	47,700	42,800	35,600

Israel	29,100	24,900	21,300
Italy	39,700	28,800	26,500
Latvia	14,100	8,600	6,800
Lithuania	14,000	8,800	6,800
Luxembourg	53,900	43,900	40,800
Malta	31,900	21,500	17,100
Moldova	9,100	5,800	4,100
Montenegro	9,100	5,800	4,000
Netherlands	49,900	36,600	36,400
Norway	88,300	66,000	61,200
Poland	23,100	11,700	9,200
Portugal	29,700	18,200	15,000
Romania	11,900	6,700	4,700
Russia	28,400	15,800	14,300
Serbia	9,200	5,700	4,100
Slovakia	22,600	12,200	11,100
Slovenia	30,200	21,000	17,100
Spain	38,300	33,400	29,300
Sweden	51,800	43,900	41,100
Switzerland	88,200	65,700	61,400
Turkey	13,000	6,800	4,700
Ukraine	9,600	5,700	4,100
United Kingdom	43,300	38,300	33,300
Overall	40,400	29,500	27,400



ACI EUROPE commissioned InterVISTAS Consulting Ltd. to consider the economic impact of European airports. Released in January 2015, the resulting study individually quantified the direct, indirect, induced and catalytic impacts of European airports for each European country, for the EU 28 and ETFA groupings, as well as for the continent as a whole. In addition the possible adverse economic impact of the forthcoming airport 'capacity crunch' were also examined, based upon EUROCONTROL's projections for unmet demand for air services in 2035.

The study drew upon hard economic data, from a range of credible sources, as well as employment data received by an unprecedented 125 airports handling circa 71% of passenger traffic. Combined with a transparent and clearly laid out methodological approach, the study is focused very much upon *how* the economic impact figures are calculated, as well as the presentation of the final figures themselves.

The Impact of an Airport provides a synopsis of the study's key findings. The full study is available in the Policy Library section of the ACI EUROPE website.

ACI EUROPE is the European region of Airports Council International, the only worldwide professional association of airport operators. ACI EUROPE represents over 450 airports in 45 European countries. Our member airports handle over 90% of commercial air traffic in Europe, welcoming more than 1.7 billion passengers, 17.8 million tonnes of freight and 20.7 million aircraft movements a year. Based in Brussels, we lead and serve the European airport industry and maintain strong links with ACI World and other ACI regions throughout the world.

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