

Brussels Airport, een sociaaleconomische motor voor de regio's

- 13.30u Welkom
- 13.40u Inleiding
 - Impact op economische groei en werkgelegenheid
 - Versterking van Brussels Airport
 - Europees perspectief
 - Aandachtpunten
- 14.40u Visie Vlaamse en Brusselse Regering
- 15.10u Debat
- 15.55u Vragen of opmerkingen?
- 16.15u Uitleiding
- 16.30u Netwerkreceptie

Brussels Airport, un moteur socioéconomique pour des régions

- 13h30 Mot de bienvenue
- 13h40 Introduction
 - Impact sur la croissance économique et sur l'emploi
 - Renforcement de Brussels Airport
 - La perspective européenne
 - Points d'attention
- 14h40 Vision Gouvernement flamand et bruxellois
- 15h10 Débat
- 15h55 Questions ou remarques?
- 16h15 Mot de clôture
- 16h30 Réception et mise en réseau



Welkom - Bienvenu

RESOC-ondervoorzitter
Vice-président du RESOC

Steven Marchand
ABVV



"Impact van Brussels Airport op
economische groei en werkgelegenheid in
België"

"Impact de Brussels Airport sur la
croissance économique et sur l'emploi en
Belgique "

Saskia Vennix

Nationale Bank van België
Banque Nationale de Belgique



Economic importance of air transport and airport activities in Belgium

Zaventem, 22nd September 2015

Saskia Vennix



Outline

- ▶ Economic importance of Belgian air transport and airport activities as a whole
- ▶ Economic importance of airport activities in Belgium
- ▶ Brussels Airport



Economic importance of air transport and airport activities in Belgium

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Economic importance of air transport and airport activities in Belgium

Economic importance of Belgian air transport and airport activities as a whole : value added

(in € million – current prices)

Cluster and sector	2009	2010	2011	2012	Share in 2012 (in %)	Change from 2009 to 2012 (in %)
1. DIRECT EFFECTS	2,594.5	2,544.1	2,685.6	2,852.0	100.0	+9.9
Air transport cluster outside airports..	703.2	710.3	777.4	801.7	31.6	+28.2
Of which Air transport	33.8	22.3	41.9	41.9	1.5	+23.8
Of which Travel agencies and tour operators	302.1	311.0	314.0	308.9	10.8	+2.3
Of which Building and repairing of aircraft	335.7	348.4	379.7	516.8	18.1	+53.9
Inside airports	1,891.3	1,833.8	1,908.3	1,950.2	68.4	+3.1
Air transport cluster	1,119.2	1,130.7	1,157.8	1,206.7	42.3	+7.8
Of which Air transport	387.6	395.7	368.3	426.8	15.0	+10.1
Of which Airport operator	313.5	328.3	370.8	388.5	13.6	+23.9
Of which Airport handling	147.5	152.2	149.9	142.9	5.0	-3.1
Of which Building and repairing of aircraft	98.3	95.0	99.1	72.0	2.5	-26.7
Of which Other air transport supporting activities	170.1	157.4	167.5	174.6	6.1	+2.7
Other airport-related activities	772.1	703.1	750.5	743.5	26.1	-3.7
Of which Cargo handling and storage	133.0	135.1	147.2	140.2	4.9	+5.4
Of which Courier and post activities	273.9	191.8	204.2	199.3	7.0	-27.2
Of which Public services	115.3	114.8	116.2	119.9	4.2	+4.0
2. INDIRECT EFFECTS	2,484.6	2,559.4	2,750.9	2,746.8	-	+10.6
TOTAL	5,079.2	5,103.5	5,436.5	5,598.7	-	+10.2

Source: NAI; NBB (Central Balance Sheet Office, own calculations).

1.5% of GDP

Economic importance of air transport and airport activities in Belgium

Economic importance of Belgian air transport and airport activities as a whole : employment

(in FTEs)

Cluster and sector	2009	2010	2011	2012	Share in 2012 (in %)	Change from 2009 to 2012 (in %)
1. DIRECT EFFECTS	32,325	31,752	31,952	32,134	100.0	-0.6
Air transport cluster outside airports..	9,273	9,005	9,143	9,198	28.6	-0.8
Of which Air transport	300	327	357	342	1.1	+14.2
Of which Travel agencies and tour operators	4,497	4,314	4,332	4,214	13.1	-6.3
Of which Building and repairing of aircraft	4,238	4,126	4,216	4,431	13.8	+4.6
Inside airports	23,052	22,747	22,809	22,936	71.4	-0.5
Air transport cluster	11,851	11,681	11,733	11,591	36.1	-2.2
Of which Air transport	4,713	4,554	4,622	4,692	14.6	-0.4
Of which Airport operator	1,469	1,490	1,533	1,541	4.8	+5.0
Of which Airport handling	2,605	2,662	2,767	2,697	8.4	+3.5
Of which Building and repairing of aircraft	1,765	1,687	1,561	1,416	4.4	-19.7
Of which Other air transport supporting activities	1,265	1,254	1,217	1,210	3.8	-4.4
Other airport-related activities	11,201	11,066	11,076	11,345	35.3	+1.3
Of which Cargo handling and storage	1,828	1,735	1,786	1,943	6.0	+6.3
Of which Courier and post activities	2,925	2,964	2,914	2,882	9.0	-1.5
Of which Security and industrial cleaning	1,487	1,465	1,480	1,524	4.7	+2.4
Of which Public services	1,944	1,914	1,921	1,932	6.0	-0.6
2. INDIRECT EFFECTS*	33,488	33,991	34,041	34,108	-	+1.9
TOTAL	65,813	65,743	65,993	66,242	-	+0.7

Source: NAI; NBB (Central Balance Sheet Office, own calculations).

1.7% of domestic employment

Economic importance of air transport and airport activities in Belgium

Economic importance of Belgian air transport and airport activities as a whole : investment

(in € million – current prices)

Cluster and sector	2009	2010	2011	2012	Share in 2012 (in %)	Change from 2009 to 2012 (in %)
Air transport cluster outside airports..	133.4	109.4	93.3	89.1	25.5	-33.2
Of which Air transport	40.7	9.4	3.0	4.3	1.2	-89.4
Of which Building and repairing of aircraft	31.5	49.6	52.5	47.2	13.5	+49.9
Of which Other air transport supporting activities	34.4	23.2	11.8	13.9	4.0	-59.6
Inside airports	254.6	162.6	206.9	260.0	74.5	+2.1
<i>Air transport cluster.....</i>	<i>188.9</i>	<i>93.7</i>	<i>96.2</i>	<i>162.1</i>	<i>46.4</i>	<i>-14.2</i>
Of which Air transport	39.9	11.7	26.7	55.7	15.9	+39.6
Of which Airport operator	75.5	40.4	46.0	72.5	20.8	-4.0
Of which Building and repairing of aircraft	8.0	7.7	3.4	5.7	1.6	-27.9
Of which Other air transport supporting activities	61.5	31.6	16.6	16.4	4.7	-73.4
<i>Other airport-related activities</i>	<i>65.8</i>	<i>68.9</i>	<i>110.7</i>	<i>97.9</i>	<i>28.0</i>	<i>+48.9</i>
Of which Courier and post activities	12.9	7.5	23.4	12.1	3.5	-6.1
Of which Other services	30.7	42.8	66.1	62.0	17.8	+101.7
TOTAL	388.0	272.0	300.2	349.1	100.0	-10.0

Source: NAI; NBB (Central Balance Sheet Office, own calculations).



Economic importance of air transport and airport activities in Belgium

Outline

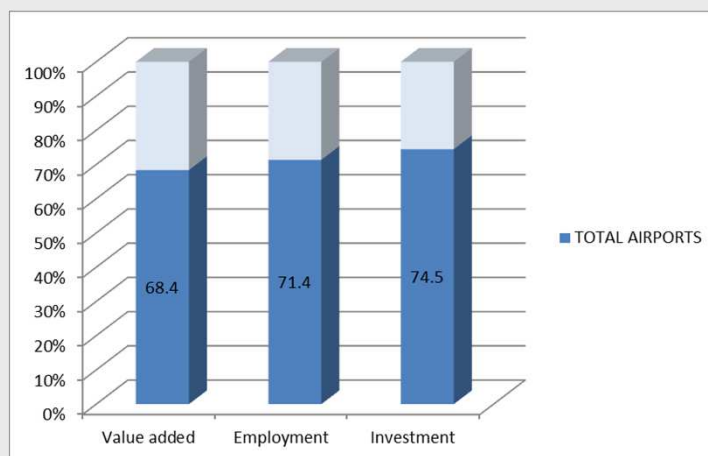
- ▶ Economic importance of Belgian air transport and airport activities as a whole
- ▶ Economic importance of airport activities in Belgium
- ▶ Brussels Airport



Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium

Relative share of airports in sector as a whole



Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium

Direct value added by airport

Airport and cluster	2009	2010	2011	2012	Share of clusters in 2012 (in %)	Change from 2009 to 2012 (in %)
Antwerp	39.2	41.9	41.4	43.3	100.0	+10.4
Air transport cluster	26.0	28.4	28.7	30.6	70.8	+18.0
Other airport-related activities	13.2	13.5	12.7	12.7	29.2	-4.5
Brussels	1,502.9	1,446.3	1,470.6	1,452.5	100.0	-3.4
Air transport cluster	869.6	890.8	886.3	881.9	60.7	+1.4
Other airport-related activities	633.3	555.5	584.2	570.5	39.3	-9.9
Charleroi	92.7	107.0	121.3	131.9	100.0	+42.3
Air transport cluster	60.7	74.2	82.9	89.7	68.0	+47.7
Other airport-related activities	32.0	32.7	38.5	42.2	32.0	+31.9
Kortrijk	6.9	7.7	10.7	9.0	100.0	+30.2
Air transport cluster	5.6	6.0	9.0	7.3	80.9	+31.1
Other airport-related activities	1.4	1.6	1.7	1.7	19.1	+26.6
Liège	218.3	202.6	239.4	287.7	100.0	+31.8
Air transport cluster	131.4	108.4	132.2	177.1	61.5	+34.7
Other airport-related activities	86.8	94.3	107.3	110.6	38.5	+27.4
Ostend	31.4	28.3	24.8	25.8	100.0	-17.7
Air transport cluster	25.9	22.9	18.7	20.0	77.6	-22.8
Other airport-related activities	5.4	5.4	6.1	5.8	22.4	+7.0
TOTAL	1,891.3	1,833.8	1,908.3	1,950.2		+3.1

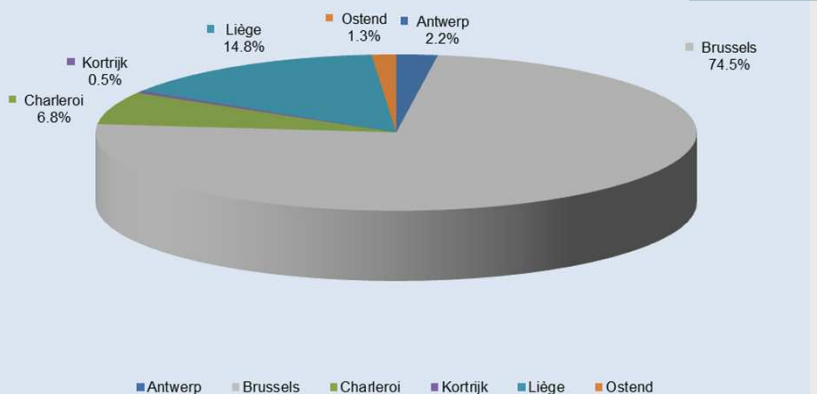
Source: NBB (Central Balance Sheet Office, own calculations)

62% air transport
38% other airport related activities

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium

Direct value added by airport in 2012



62% air transport
38% other airport
related activities

Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium

Direct employment by airport

Airport and cluster	2009	2010	2011	2012	Share of clusters in 2012 (in %)	Change from 2009 to 2012 (in %)
Antwerp	505	510	521	512	100.0	+1.3
Air transport cluster.....	365	371	370	358	70.0	-2.0
Other airport-related activities.....	140	138	151	154	30.0	+10.1
Brussels	18,169	17,763	17,478	17,463	100.0	-3.9
Air transport cluster.....	9,205	9,002	8,996	8,853	50.7	-3.8
Other airport-related activities.....	8,963	8,761	8,482	8,610	49.3	-3.9
Charleroi	1,323	1,362	1,474	1,549	100.0	+17.1
Air transport cluster.....	735	784	819	801	51.7	+9.0
Other airport-related activities.....	588	578	655	748	48.3	+27.2
Kortrijk	130	130	141	132	100.0	+2.0
Air transport cluster.....	104	103	111	101	76.2	-3.0
Other airport-related activities.....	26	27	29	31	23.8	+21.8
Liège	2,483	2,556	2,795	2,889	100.0	+16.4
Air transport cluster.....	1,090	1,087	1,133	1,173	40.6	+7.6
Other airport-related activities.....	1,392	1,469	1,662	1,716	59.4	+23.2
Ostend	443	428	400	390	100.0	-11.8
Air transport cluster.....	352	335	303	305	78.0	-13.4
Other airport-related activities.....	91	93	97	86	22.0	-5.8
TOTAL	23,052	22,747	22,809	22,936		-0.5

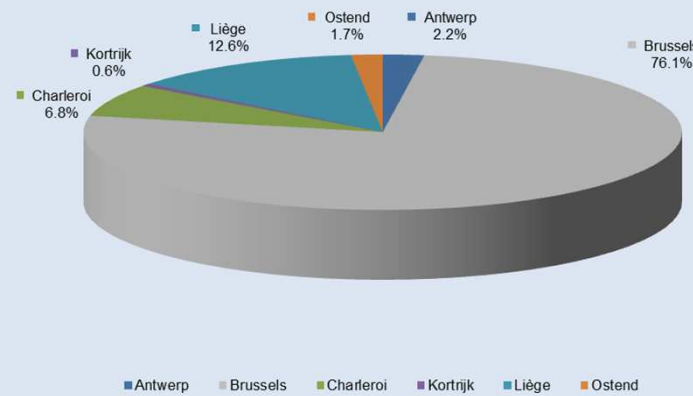
51% air transport
49% other airport
related activities

Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium

Direct employment by airport in 2012



Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

Outline

- ▶ Economic importance of Belgian air transport and airport activities as a whole
- ▶ Economic importance of airport activities in Belgium
- ▶ **Brussels Airport**

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: value added Brussels Airport

€ million – current prices

Cluster and sector	2009	2010	2011	2012	Share in 2012 (in %)	Change from 2009 to 2012 (in %)
1. DIRECT EFFECTS	1,502.9	1,446.3	1,470.6	1,452.5	100.0	-3.4
Air transport cluster	869.6	890.8	886.3	881.9	60.7	+1.4
Of which Air transport	276.8	310.6	272.3	287.1	19.8	+3.7
Of which Airport operator	256.8	258.4	292.4	308.7	21.3	+20.2
Of which Airport handling	131.8	135.3	132.3	122.4	8.4	-7.1
Of which Building and repairing of aircraft	64.7	56.7	58.4	28.9	2.0	-55.4
Of which Other air transport supporting activities	137.8	128.4	129.5	133.3	9.2	-3.3
Other airport-related activities	633.3	555.5	584.2	570.5	39.3	-9.9
Of which Cargo handling and storage	125.6	127.2	137.9	132.4	9.1	+5.4
Of which Courier and post activities	211.2	121.1	124.7	120.5	8.3	-42.9
Of which Trade	37.4	47.6	52.6	49.4	3.4	+32.0
Of which Hotels, restaurants and catering	61.8	62.4	62.1	56.7	3.9	-8.1
Of which Public services	96.7	97.2	96.5	98.0	6.8	+1.4
2. INDIRECT EFFECTS	1,515.1	1,591.3	1,639.1	1,583.2	-	+4.5
TOTAL	3,018.0	3,037.6	3,109.7	3,035.7	-	+0.6

Sources: NAI, NBB (Central Balance Sheet Office, own calculations)

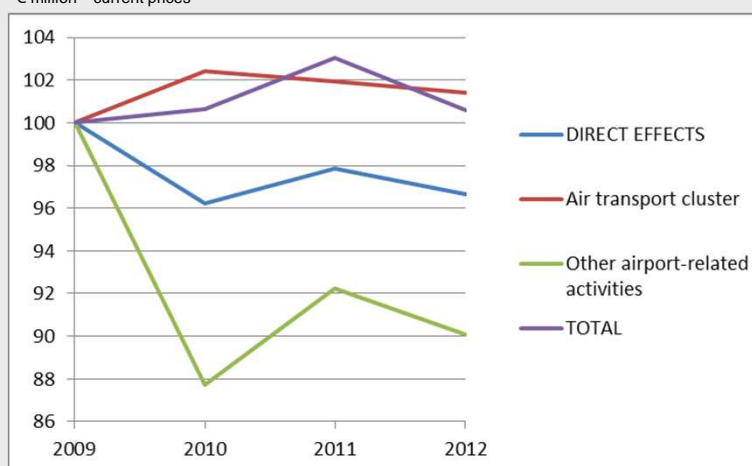
1.4% of Flemish GDP



Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: value added Brussels Airport

€ million – current prices



2009 = 100

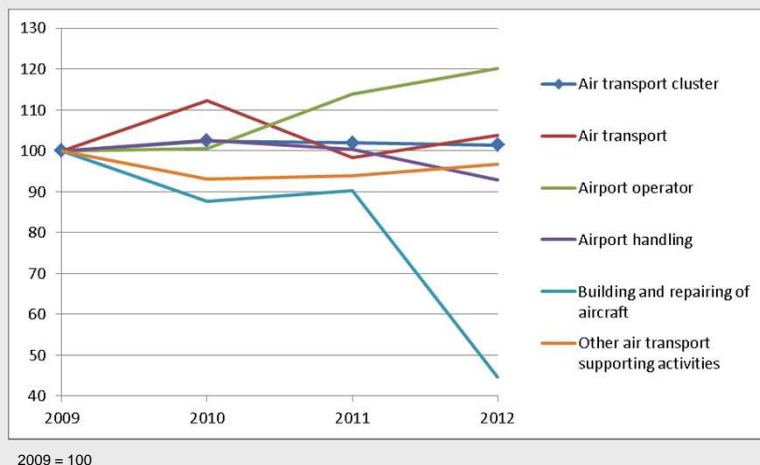


Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: value added Brussels Airport

Air transport cluster

€ million – current prices

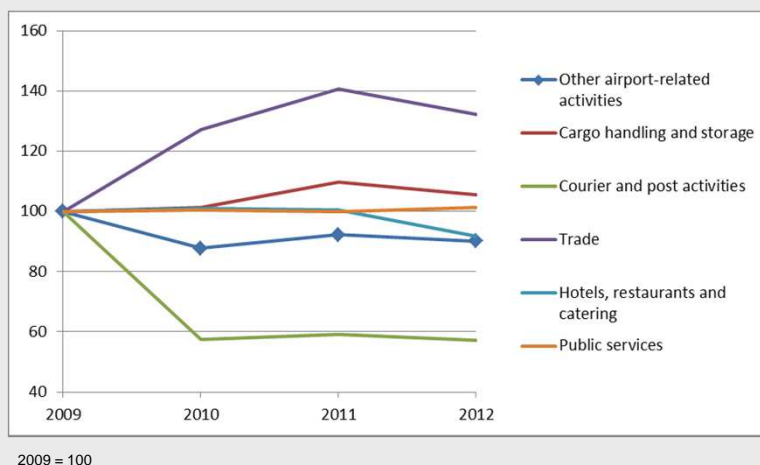


Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: value added Brussels Airport

Other airport-related activities

€ million – current prices



Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: value added Brussels Airport

Direct value added top 10 in 2012

	Name of company or organisation	Sector
1	Brussels Airport Company	Airport operator
2	Brussels Airlines	Air transport
3	Belgocontrol	Other air transport supporting activities
4	TUI Airlines Belgium	Air transport
5	Swissport Belgium	Airport handling
6	DHL Aviation	Courier and post activities
7	Belgian Air Force	Public services
8	AviaPartner Belgium	Airport handling
9	Belgian Sky Shops	Trade
10	TNT Express Belgium	Courier and post activities

Share in total 64%

Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: employment Brussels Airport

FTEs

Cluster and sector	2009	2010	2011	2012	Share in 2012 (in %)	Change from 2009 to 2012 (in %)
1. DIRECT EFFECTS	18,169	17,763	17,478	17,463	100.0	-3.9
Air transport cluster	9,205	9,002	8,996	8,853	50.7	-3.8
Of which Air transport	3,832	3,742	3,827	3,895	22.3	+1.6
Of which Airport operator	759	735	739	728	4.2	-4.1
Of which Airport handling	2,313	2,341	2,431	2,342	13.4	+1.3
Of which Building and repairing of aircraft	1,295	1,196	1,056	956	5.5	-26.2
Of which Other air transport supporting activities	982	965	921	905	5.2	-7.8
Other airport-related activities	8,963	8,761	8,482	8,610	49.3	-3.9
Of which Cargo handling and storage	1,722	1,625	1,676	1,840	10.5	+6.9
Of which Courier and post activities	1,964	1,893	1,716	1,660	9.5	-15.5
Of which Security and industrial cleaning	953	986	900	917	5.3	-3.8
Of which Hotels, restaurants and catering	1,201	1,176	1,115	1,127	6.5	-6.1
Of which Public services	1,638	1,630	1,603	1,587	9.1	-3.1
2. INDIRECT EFFECTS	20,828	21,049	20,723	20,825	-	0.0
TOTAL	38,997	38,812	38,201	38,288	-	-1.8

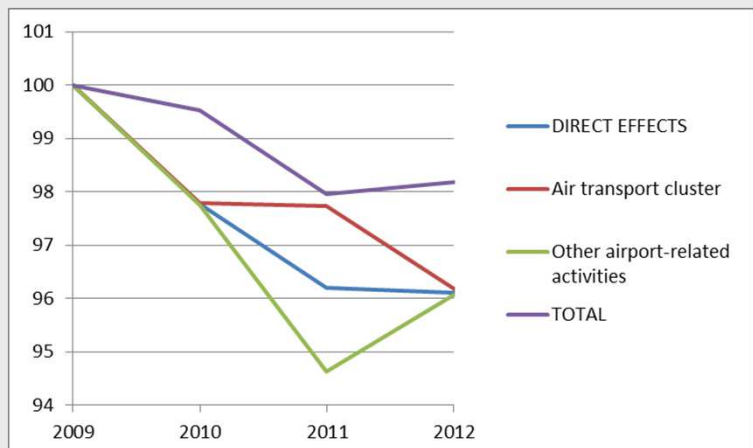
1.6% of Flemish employment

Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: employment Brussels Airport

FTEs



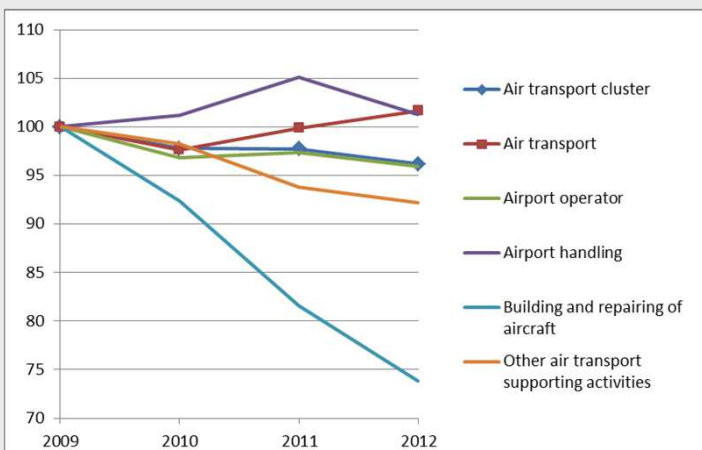
2009 = 100

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: employment Brussels Airport

Air transport cluster

FTEs



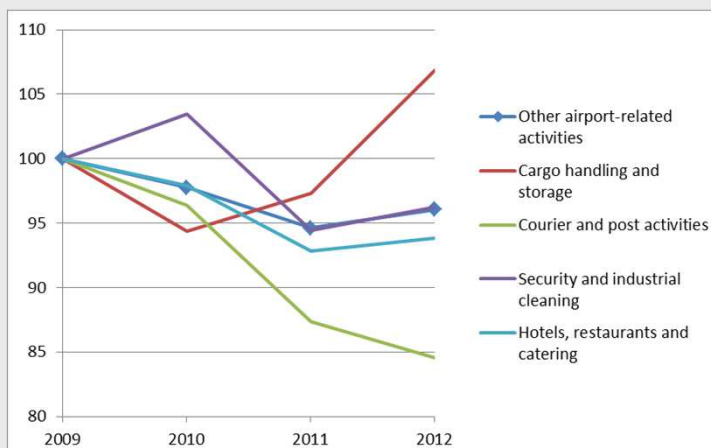
2009 = 100

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: employment Brussels Airport

Other airport-related activities

FTEs



2009 = 100

Economic importance of air transport and airport activities in Belgium

Economic importance of airport activities in Belgium: employment Brussels Airport

Direct employment top 10 in 2012

	Name of company or organisation	Sector
1	Brussels Airlines	Air transport
2	Swissport Belgium	Airport handling
3	Belgian Air Force	Public services
4	AviaPartner Belgium	Airport handling
5	DHL Aviation	Courier and post activities
6	Brussels Airport Company	Airport operator
7	Belgocontrol	Other air transport supporting activities
8	G4S Aviation Security	Security and industrial cleaning
9	TUI Airlines Belgium	Air transport
10	Sabena Technics Bru	Building and repairing of aircraft

Share in total 56%

Source: NBB (Central Balance Sheet Office, own calculations)

Economic importance of air transport and airport activities in Belgium

“Versterking van Brussels Airport”

“Renforcement de Brussels Airport”

Piet Demunter

Brussels Airport Company

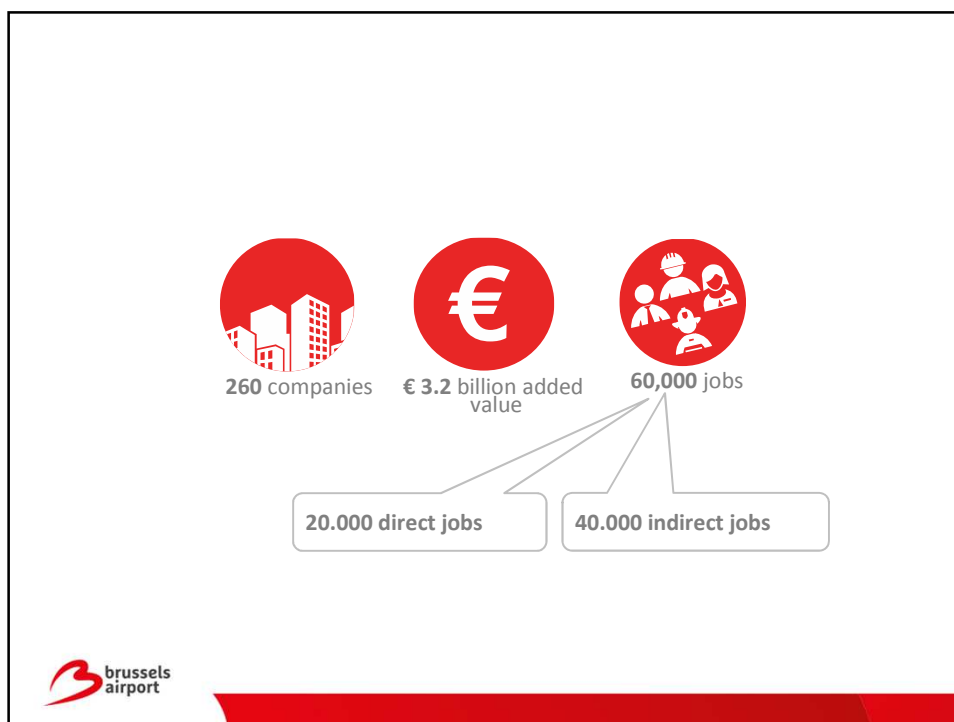


Brussels Airport

*Piet Demunter, Director Strategic Development
Brussels Airport Company*



www.brusselsairport.be







Transportpolen

Motor van welvaart en welzijn



Luchthavens zijn de belangrijkste
knooppunten van deze eeuw



Luchthavens stimuleren

Tourisme

Handel

Investerings

Werkgelegenheid

Toegevoede waarde



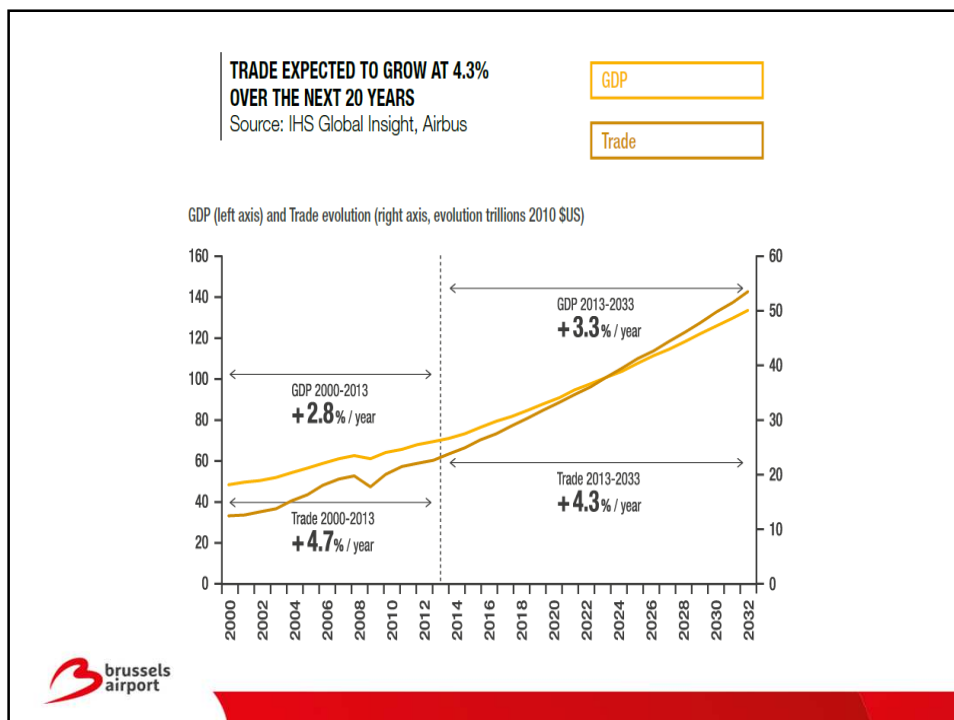
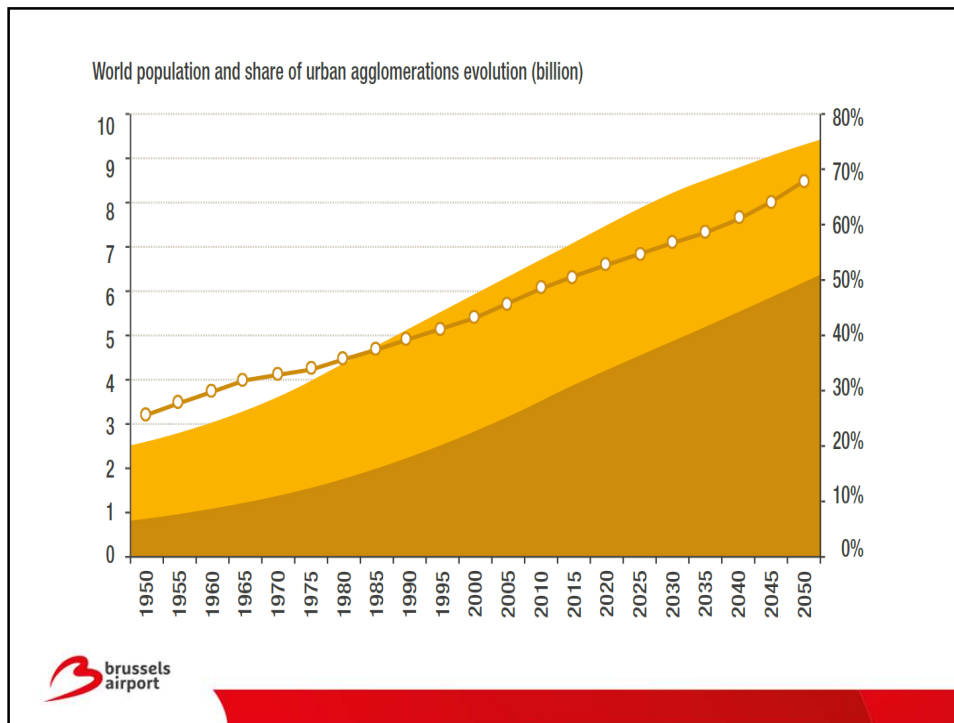


World Population



Middle class as % of world population

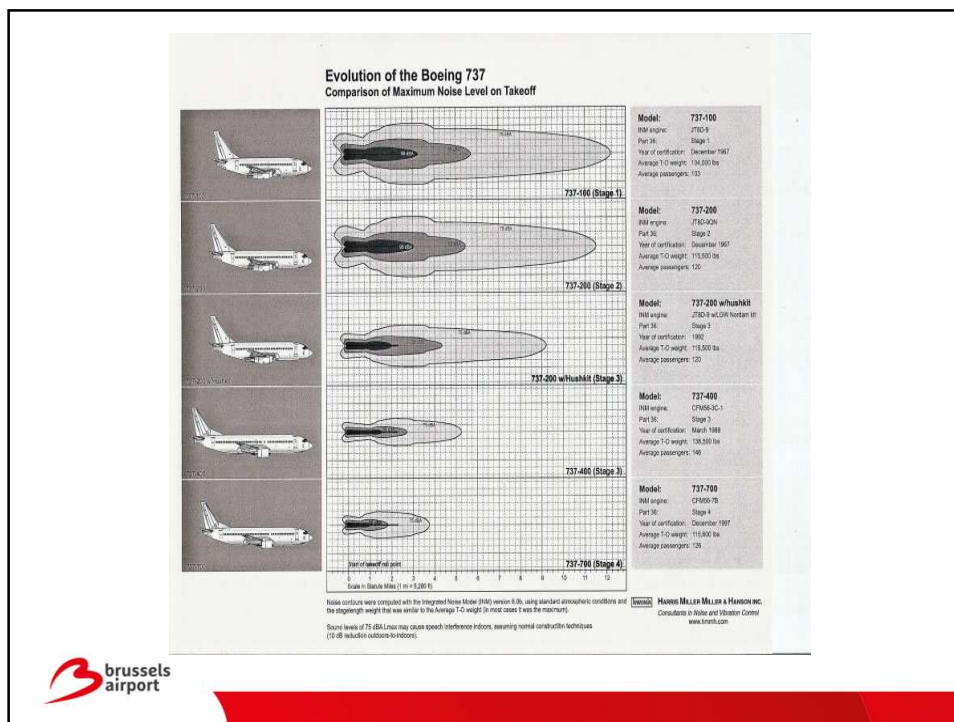




Cruciaal om te groeien in lijn met de markt

Belangrijk ons netwerk verder uit te kunnen bouwen





Thank You!

*Piet Demunter, Director Strategic Development
Brussels Airport Company*



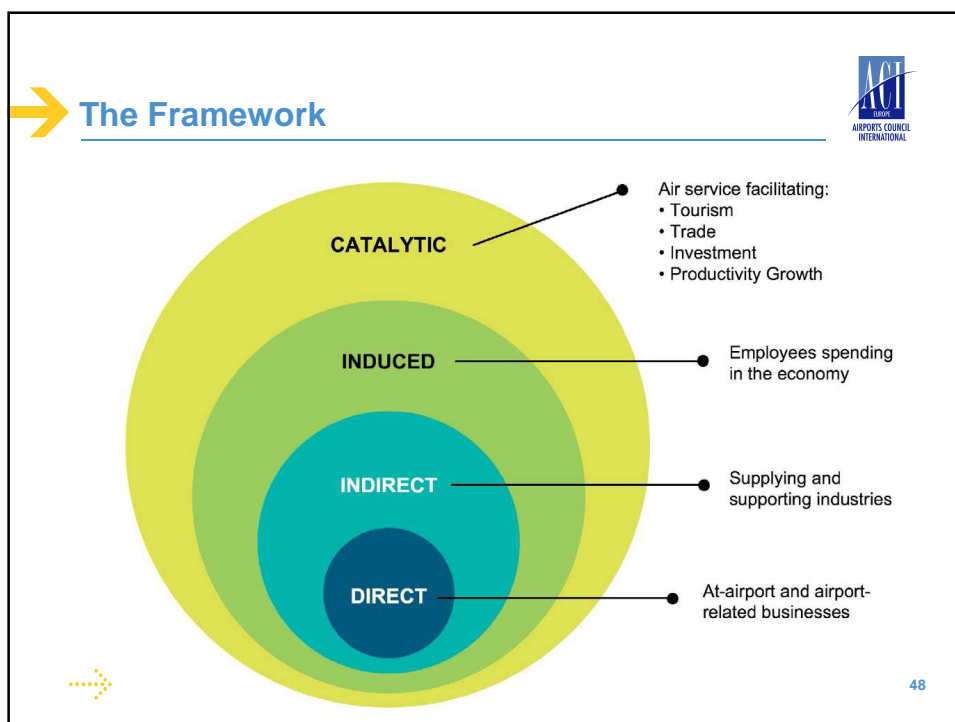
www.brusselsairport.be

“Impact van de luchthavens in Europees perspectief”

“Impact des aéroports dans une perspective européenne ”

Donagh Cagney
ACI Europe







The Framework: Direct, Indirect & Induced



- **Direct:** Directly associated with the operation and management of activities at European airports

- Airport campus activities ('on-site') & nearby airport-related business activities

Direct

Indirect

Induced

Catalytic

- **Indirect:** Up-stream industries that supply & support the activities at European airports

- Travel agencies, airframe assembly, in-flight catering preparation

- **Induced:** Employees of firms directly or indirectly connected to the airports spending their income in the economy

- Employee wage spending in other sectors of general economy



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The Framework: Catalytic Impacts



- The way in which the airport facilitates the business and productivity of other sectors of the economy

- This distinguishes aviation from many other economic activities

Direct

Indirect

Induced

Catalytic

Tourism



Foreign
Direct
Investment

Trade in
Products &
Services




Productivity
Increases



50


→ The Framework: Catalytic Impacts

- The way in which the airport facilitates the business and productivity of other sectors of the economy
 - This distinguishes aviation from many other economic activities




Direct
Indirect
Induced
Catalytic


Tourism




Foreign Direct Investment





Trade in Products & Services




Productivity Increases





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→ The Framework: Catalytic Impacts

- The way in which the airport facilitates the business and productivity of other sectors of the economy
 - This distinguishes aviation from many other economic activities




Direct
Indirect
Induced
Catalytic


Tourism




Foreign Direct Investment





Trade in Products & Services



Productivity Increases





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→ The Framework: Catalytic Impacts

■ The way in which the airport facilitates the business and productivity of other sectors of the economy

➤ This distinguishes aviation from many other economic activities

Tourism

Trade in Products & Services

Foreign Direct Investment

Productivity Increases

Direct

Indirect

Induced

Catalytic

53

→ The Framework: Catalytic Impacts

■ The way in which the airport facilitates the business and productivity of other sectors of the economy

➤ This distinguishes aviation from many other economic activities

Tourism

Trade in Products & Services

Foreign Direct Investment

Productivity Increases

Direct

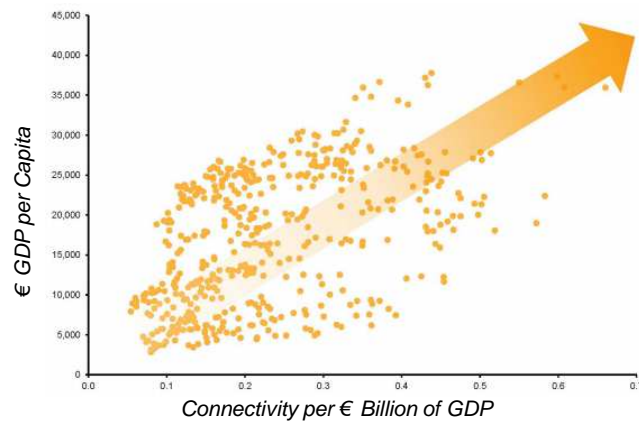
Indirect

Induced

Catalytic

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→ The Framework: Catalytic Impacts



**A 10% increase in a country's air connectivity
= 0.5% increase in GDP per capita¹**

¹ 'Economic Impact of European Airports – A Critical Catalyst to Economic Growth', InterVISTAS, January 2015

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→ The Publications



InterVISTAS
a company of Rayet MauborgneGIV

Economic Impact of European Airports
A Critical Catalyst to Economic Growth



**THE IMPACT
OF AN AIRPORT**



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➔ **The Key Figures: European Economic Impact**

InterVISTAS
a company of Nippon Research & Consulting

ACT
AIRPORTS COUNCIL INTERNATIONAL

Region	Jobs	GDP (€ Billion)	% of National GDP
EU 28	8,970,000	541.4	4.1
ETFA	326,800	38	4.3
Other Countries	3,047,100	95.1	3.6
Total Europe	12,343,900	674.5	4.1

PREPARED FOR
ACT EUROPE
January 2015

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➔ **The Key Figures: Economic Impact In Belgium**

InterVISTAS
a company of Nippon Research & Consulting

ACT
AIRPORTS COUNCIL INTERNATIONAL

Belgium	Jobs	GDP (€ Billion)	% of National GDP
Direct	31,100	1,963	0.5
Indirect	27,700	1,868	0.5
Induced	24,100	1,880	0.5
Catalytic	88,800	8,948	2.3
Total	171,700	14,659	3.8

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January 2015

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"Aandachtspunten betreffende de rol en de werking van Brussels Airport"

"Points d'attention au sujet du rôle et du fonctionnement de Brussels Airport"

Philippe Van Muylder

ESRBHG-voorzitter
Président du CESRBC

RESOC
ECONOMISCHE EN SOCIALE RAAD



SERV
sterk door overleg

Visie vanuit de Vlaams en Brusselse Regering

Ben Weyts

Vlaams minister van Mobiliteit, Openbare Werken, Vlaamse Rand, Toerisme en Dierenwelzijn

Vision du Gouvernement flamand et bruxellois

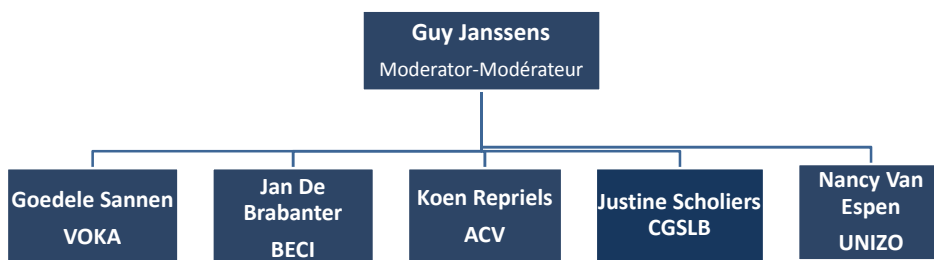
Didier Gosuin

Ministre du Gouvernement de la Région de Bruxelles-Capitale chargé de l'Economie et de l'Emploi



**Debat met
vertegenwoordigers van
ESRBHG, SERV en RESOC**

**Débat avec des
représentants du CESRBC,
du SERV et du RESOC**



Heeft u een vraag?

Avez-vous une question?



Uitleiding - Mot de clôture

SERV-voorzitster
Présidente du SERV

Caroline Copers



Met de trein naar huis? Vous prenez le train?

Luchthaven-Leuven Aéroport-Louvain	17:21, 17:38, 18:21
Luchthaven-Brussel Aéroport-Bruxelles	17:13, 17:26, 17:52, 18:13, 18:26
Luchthaven-Vilvoorde Aéroport-Vilvorde	17:11, 17:26, 17:42
Luchthaven-Antwerpen Aéroport-Anvers	17:11, 17:42, 18:11, 18:42

