

# Istanbul New Airport

Project Presentation

*Sep.2015*  
*ISTANBUL*

iGA

# Content

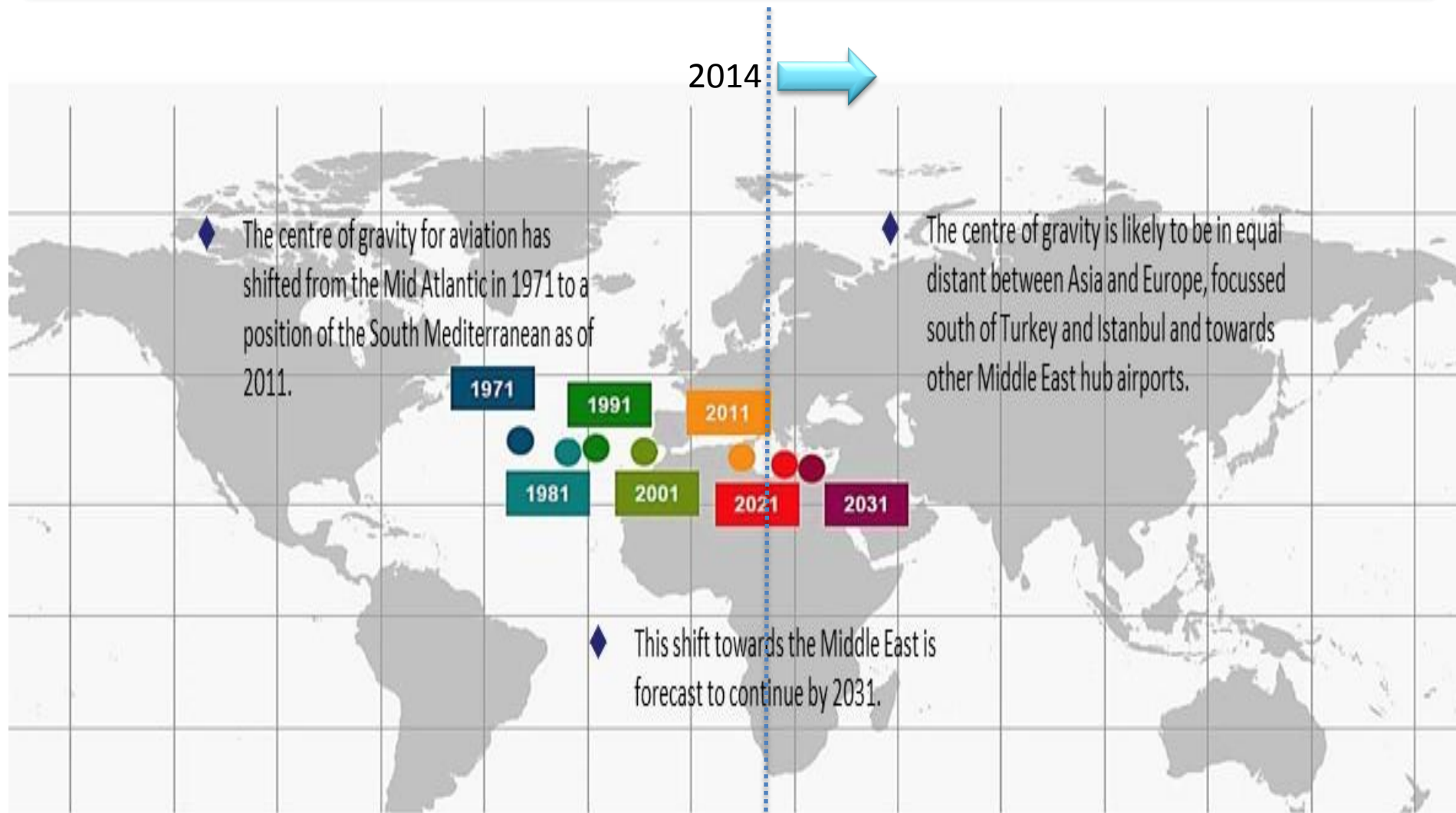
- Why 'Istanbul New Airport' ?
- Project Overview
- Location and Transportation
- What are we building?
- Operation
- How it is going to look like?



# Why 'Istanbul New Airport' ?



# Global aviation centre of gravity: 1971 to 2031



Source: Turkish Airlines from Airbus Global Market Forecast (2012-2031)

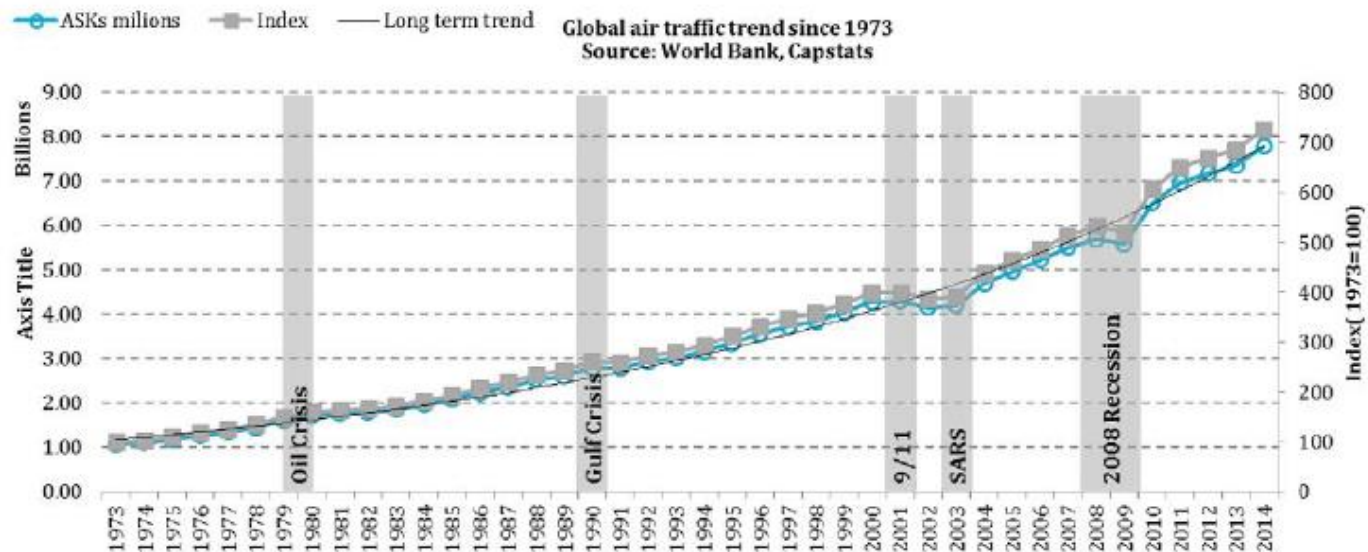
## Global Air Traffic Demand

- Last 40 years air travel has grown 600%.
- Just over 3 billion passengers carried in 2013. The average CAGR is 5%.
- The growth rate has increased since 2002 and varies across different markets.
- Boeing are forecasting the current number of planes in service (20,310) will be double by 2032.

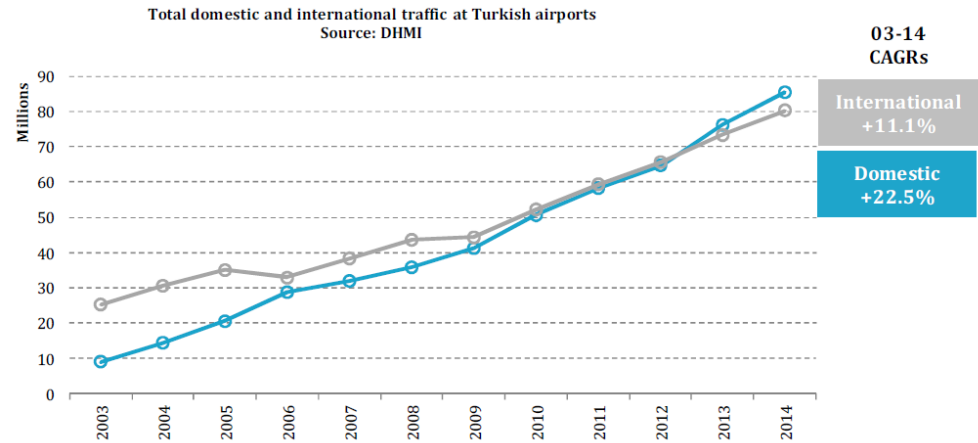
## Air Traffic in Turkey

- Turkey has also seen this growth. Since 2002:
- CAGR for international traffic to Turkey is more than 10 while CAGR for domestic is 22%.
- Istanbul has seen a significant portion of this growth increasing traffic 4.5 times since 2002 compared to 2.5 times for Antalya.

Figure 1: Global air traffic demand since 1973



- Turkish aviation market grew by 14% CAGR from 2002 to 2014.
- Growth rate was 12,1% for the last 24 months
- The total number of passenger in 2014 was 166 million.
- Frequency of Turkish Air Routes reveals the dependency on the European destinations and significant growth opportunities in Asia and the Middle East.
- Turkish carriers are able to shift their focus to the fastest-growing regions.

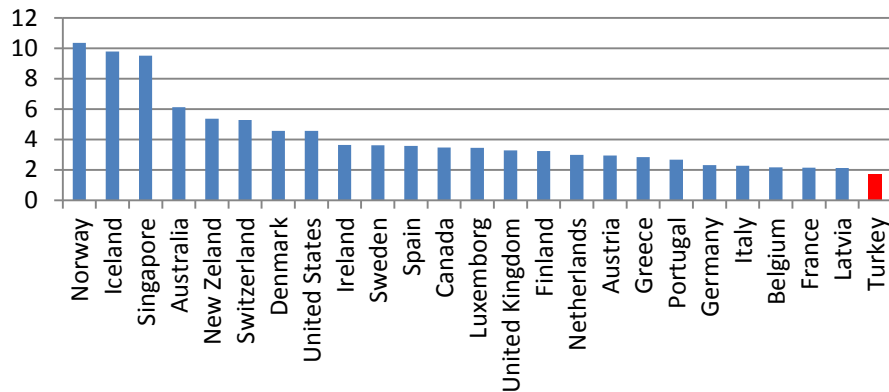


(Million)	2009	2010	2011	2012	2013	2014	2015 E	2016 E	2017 E	2023 E
Domestic	44	52	59	66	73	80	90	98	106	170
International	41	51	58	65	76	86	97	107	117	180
Total	86	103	118	130	150	166	187	205	223	350

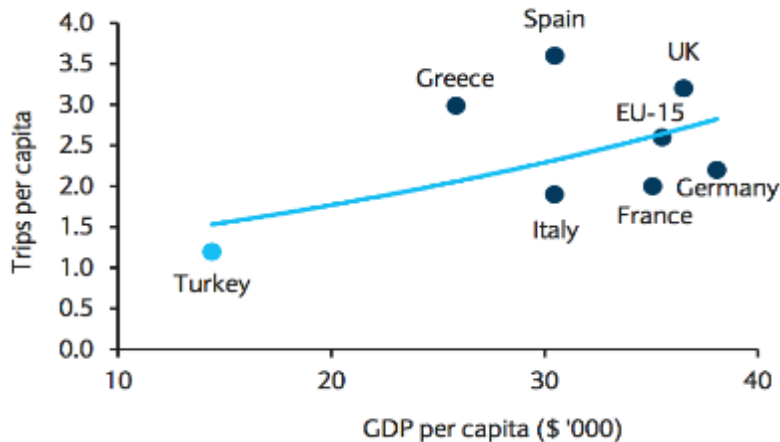
CAGR (2012-2023) is expected around %10,5

# Potential of Turkish Aviation Industry

Passenger Traffic/Population



Total trips per capita vs GDP per capita



Source: DHMI, BTS (US), Eurostat, IMF (2011)

Airport Name	IATA	2013	2014	2014-2013 Change
1 Atlanta International Airport	ATL	94,430,785	96,178,899	1.9%
2 Beijing Capital International Airport	PEK	83,712,355	86,128,000	2.9%
3 Heathrow Airport	LHR	72,368,030	73,374,825	1.4%
4 Tokyo International Airport	HND	68,906,636	72,762,530	5.6%
5 Los Angeles International Airport	LAX	66,702,252	70,662,212	5.9%
6 Dubai International Airport	DXB	66,431,533	70,475,636	6.1%
7 O'Hare International Airport	ORD	66,883,271	70,075,204	4.8%
8 Paris Charles de Gaulle Airport	CDG	62,052,917	63,813,756	2.8%
9 Dallas-Fort Worth International Airport	DFW	60,436,266	63,522,823	5.1%
10 Hong Kong International Airport	HKG	59,609,414	62,947,541	5.6%
11 Frankfurt Airport	FRA	58,036,948	59,566,132	2.6%
12 Atatürk International Airport	IST	51,297,790	56,954,790	11.0%
13 Soekarno-Hatta International Airport	CGK	59,701,543	56,537,361	-5.3%
14 Amsterdam Schiphol Airport	AMS	52,569,250	54,978,023	4.6%
15 Guangzhou Baiyun International Airport	CAN	52,450,262	54,787,553	4.5%
16 Singapore Changi Airport	SIN	53,726,087	54,093,070	0.7%
17 Denver International Airport	DEN	52,556,359	53,572,514	1.9%
18 John F. Kennedy International Airport	JFK	50,413,204	53,254,362	5.6%
19 Shanghai Pudong International Airport	PVG	47,189,849	51,652,000	9.5%
20 Kuala Lumpur International Airport	KUL	47,498,157	48,918,988	3.0%

# Potential of Turkish Aviation Industry



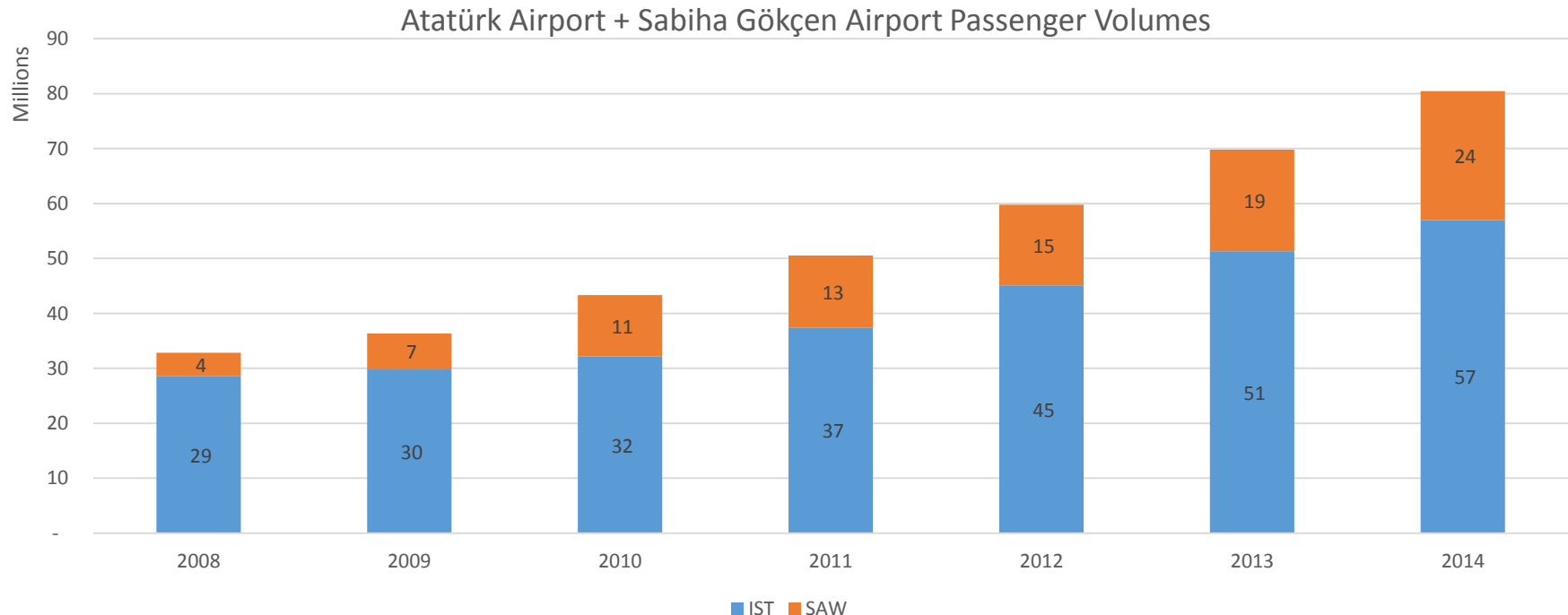
Source: Master Card 2014 Global Destination Cities Index



# Current situation in Istanbul

There are two airports serving the city of Istanbul; main gateway and Europe's 4<sup>th</sup> biggest airport after LHR, CDG and FRA; Istanbul Atatürk (IST) on the European side and Europe's fastest growing airport; Istanbul Sabiha Gökçen (SAW) on the Anatolian side.

- Atatürk Airport handled 57m/yr. pax in 2014 and reached its built capacity / 2 runways
- Sabiha Gökçen handled 24m/yr. pax in 2014 and reached its built capacity / 1 runway



# Turkish Airlines fleet expansion ensures continued growth



	Type	Total	Owned	Financial Lease	Opr./Wet Lease	Seat Capacity	Average Fleet Age	Year End Fleet*							
								2014	2015	2016	2017	2018	2019	2020	2021
Wide Body	A330-200	8		5	3	2,084	9.0	16	16	16	14	14	13	10	10
	A330-300	12		12		3,468	2.1	18	25	30	30	30	30	30	30
	A340-300	7	7			1,890	17.6	7	7	7	7	7	7	7	7
	B777-3ER	12		12		4,044	2.8	16	23	29	32	32	32	32	32
	Wet Lease	3			3	936	6.5								
	<b>Total</b>	<b>42</b>	<b>7</b>	<b>29</b>	<b>6</b>	<b>12,422</b>	<b>6.5</b>	<b>57</b>	<b>71</b>	<b>82</b>	<b>83</b>	<b>83</b>	<b>82</b>	<b>79</b>	<b>79</b>
Narrow Body	B737-900ER	10		10		1,510	1.5	10	15	15	15	15	15	15	
	B737-9 MAX											5	10	10	
	B737-800	48	14	24	10	7,680	7.9	58	58	78	77	68	68	68	
	B737-800 WL	22	10		12	3,908	11.8	32	31	29	29	27	27	17	
	B737-8 MAX											20	30	55	
	B737-700	4			4	496	7.9	3	3	1	1	1	1		
	B737-700 WL	10			10	1,490	7.5	8							
	A320-200	33		12	21	5,312	7	33	30	30	23	19	12	12	
	A321-200	41		39	2	7,570	3.3	43	56	66	68	68	68	66	
	A320 NEO									4	4	4	4	4	
	A321 NEO									4	31	56	88	88	
	A319-100	14		6	8	1,848	5.7	14	14	14	11	9	8	6	
	<b>Total</b>	<b>182</b>	<b>24</b>	<b>91</b>	<b>67</b>	<b>29,814</b>	<b>6.6</b>	<b>201</b>	<b>207</b>	<b>237</b>	<b>232</b>	<b>262</b>	<b>294</b>	<b>341</b>	
Cargo	A310-300	2	2			-	25.4	2	2	2	2	2	2	2	
	A330-200	5		5		-	1.7	5	5	5	5	5	5		
	Wet Lease	2			2	-	11.8								
	<b>Total</b>	<b>9</b>	<b>2</b>	<b>5</b>	<b>2</b>	<b>-</b>	<b>9.2</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>7</b>		
<b>GRAND TOTAL</b>	<b>233</b>	<b>33</b>	<b>125</b>	<b>75</b>	<b>42,236</b>	<b>6.7</b>	<b>265</b>	<b>285</b>	<b>326</b>	<b>322</b>	<b>352</b>	<b>383</b>	<b>427</b>		

# Turkish Airlines Current and New Destinations



# Destinations from Istanbul Airports

Total : **276** Destinations

In 4 Hours : **177** Destinations

In 3 Hours : **122** Destinations





# Decisions regarding the Istanbul New Airport

The Government of the Republic of Turkey has decided to build a new airport in Istanbul due to lack of capacity at current airports and determined the location of it on 13 August 2012.

DHMI – General Directorate Of State Airports Authority has issued the tender for 25 Years BOT Concession for Istanbul New Airport on January 2013 with a preliminary project.

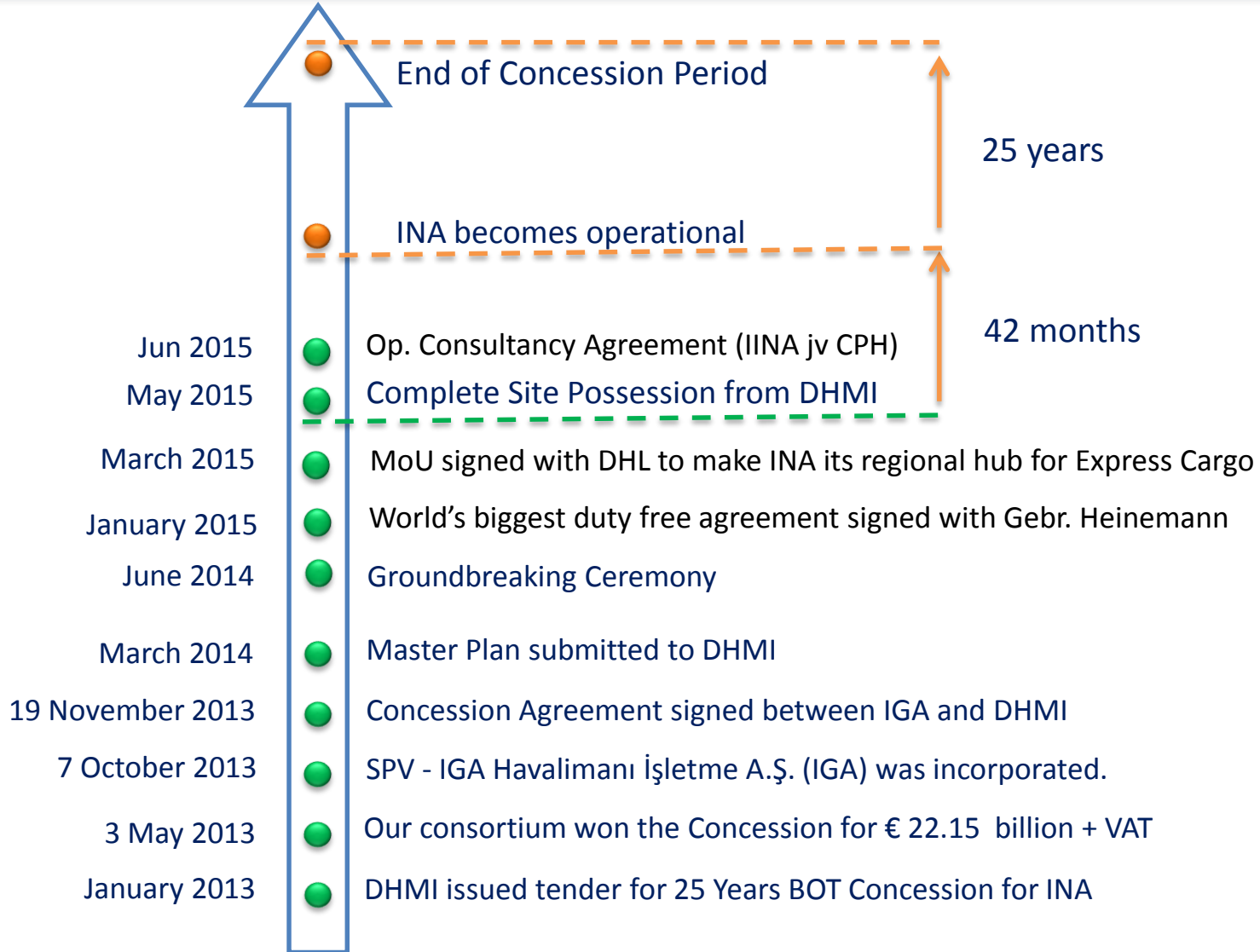
Ataturk airport will close to commercial operations when INA opens



# Project Overview



# Project Key Dates



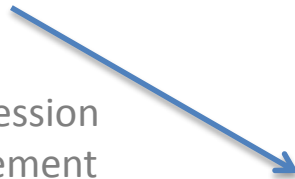
- İGA's investors are; Cengiz İnşaat Sanayi ve Ticaret A.Ş., MAPA İnşaat ve Ticaret A.Ş., Limak İnşaat Sanayi ve Ticaret A.Ş., Kolin İnşaat Turizm Sanayi ve Ticaret A.Ş. and Kalyon İnşaat Sanayi ve Ticaret A.Ş. companies all having an equal share of 20%.
- Investor companies have investments in a wide range of sectors inside and outside of the country, in sectors such as construction, energy, tourism, mining, port and airport operation.
- Investors' experience in airport development and construction include:
  - Istanbul Sabiha Gökçen (Turkey)
  - Pristina (Kosovo)
  - Cairo-Terminal 2 (Egypt)
  - Baku Haydar Aliyev (Azerbaijan)
  - Ordu-Giresun (Turkey)
  - Erbil and Dohuk (Northern Iraq)
- Investors' airport operating experience includes:
  - Istanbul Sabiha Gökçen (Turkey)
  - Pristina (Kosovo)







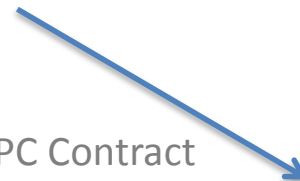
Concession Agreement



iGA Operation



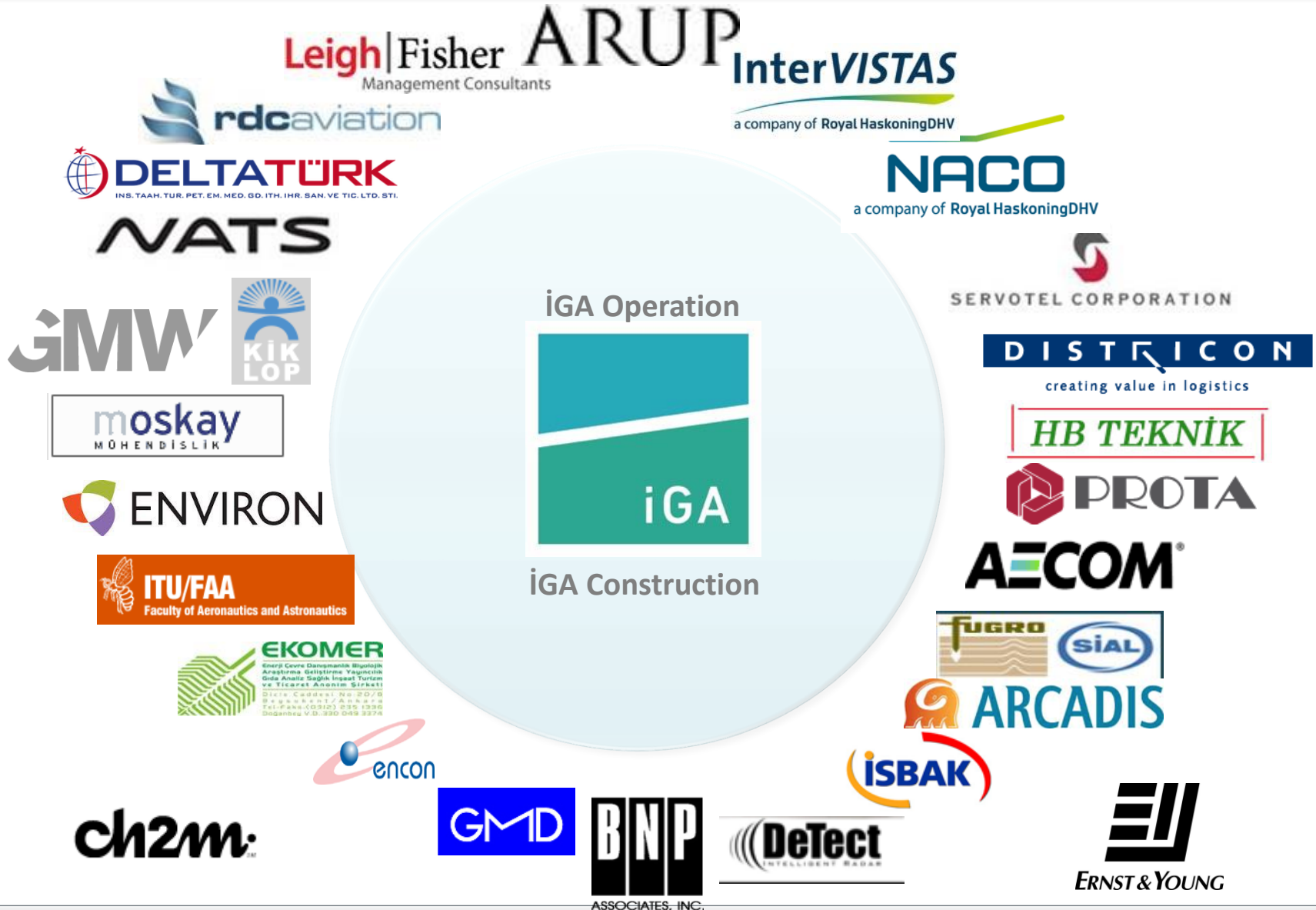
EPC Contract



## SPV

- Finance
- Development
- Stakeholders Relationship
- Operate and Maintain
- Transfer to DHMI at the end of the Concession

# Consultants of the Project



# Location and Transportation



# Locations of Istanbul Airports





# Transportation - Highways





# Connectivity - Railway



# What are we building?



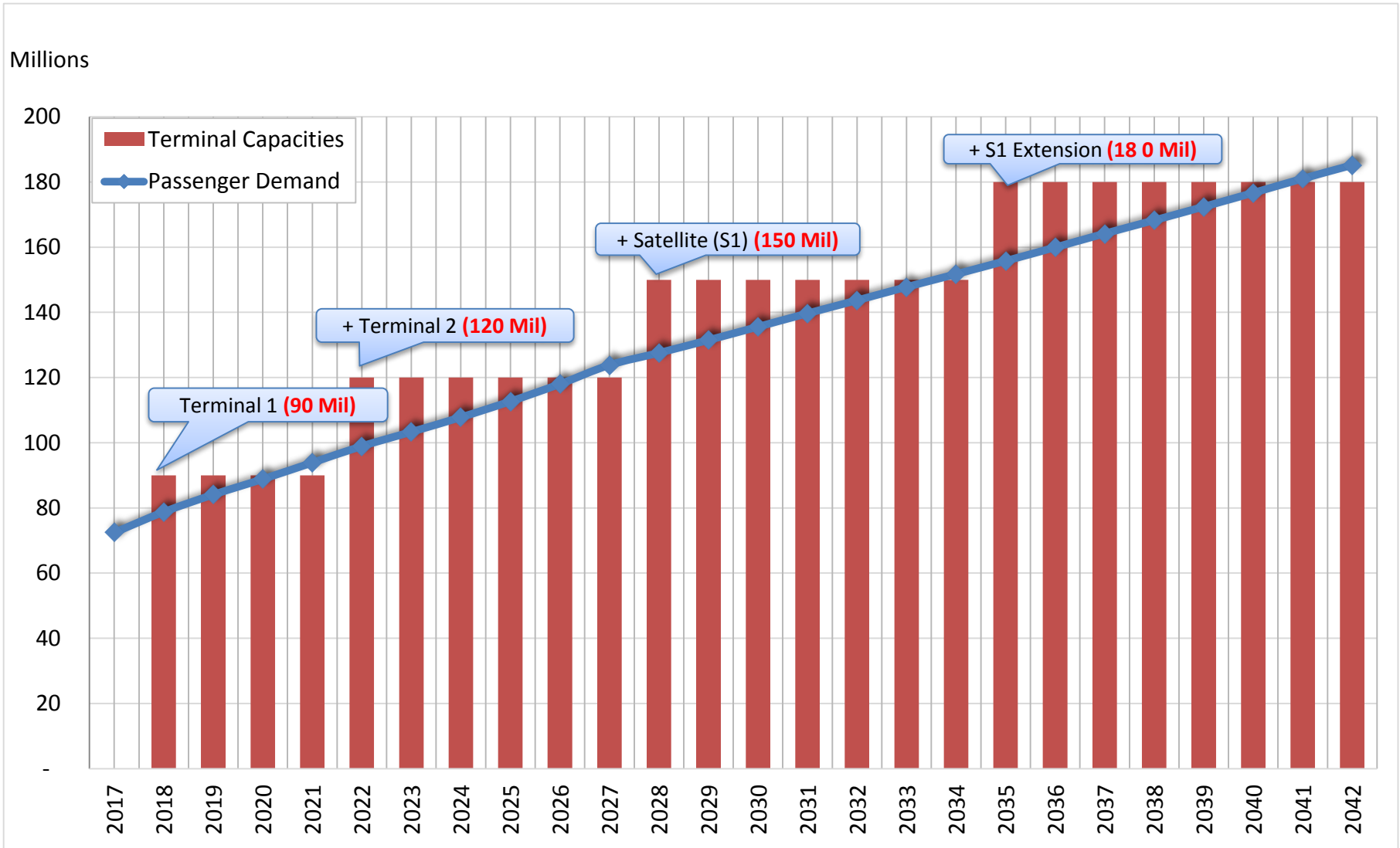
# Istanbul New Airport

- INA is going to be built in four phases
- A triggering construction model
- Construction of the initial phase is set to be completed by 29 October 2017
- Operational as of 2018
- Biggest in Europe by surpassing London Heathrow with 90m/yr. capacity
- Set to be biggest in the world

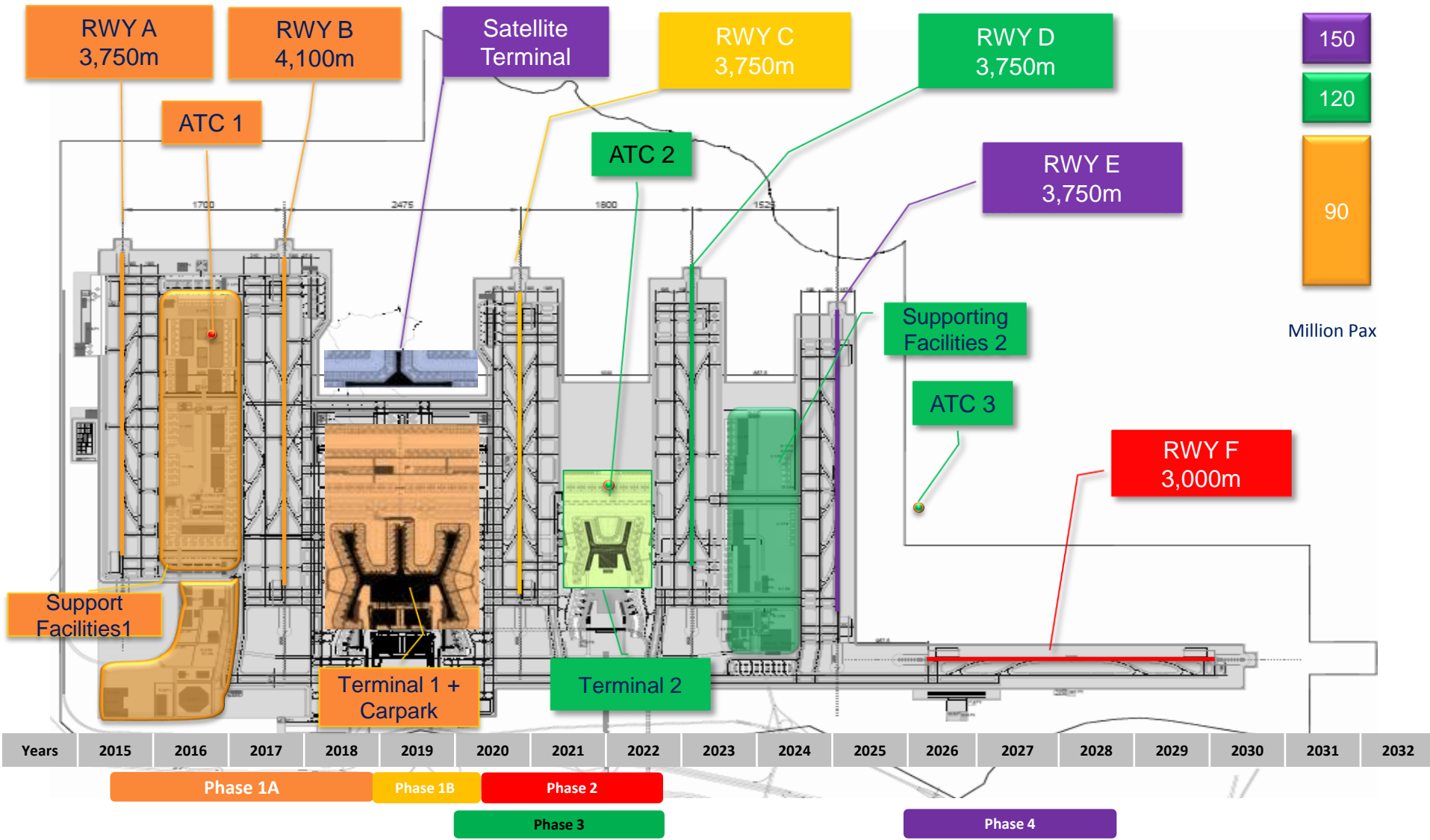




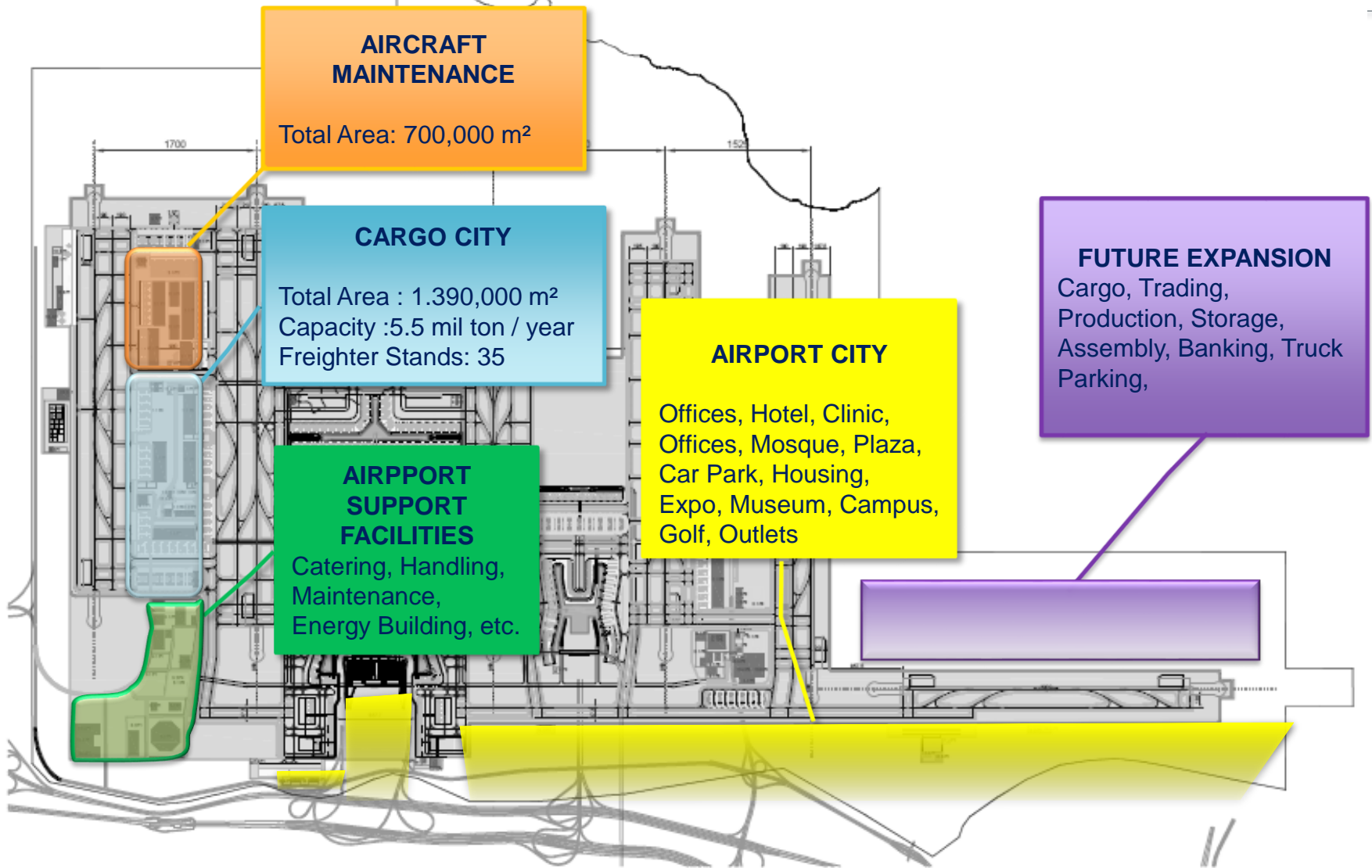
# Triggering construction model



# Master Plan in Phases



# Master Plan – Support Facilities



# Airport City Concept







## Hotel

- 3,4,5 Star • Expo Hotel
- Pet Hotel • Condomium



## Offices

- Airline • Nonaviation
- Central Offices • FreeTradeZone



## Residential

- Guest Houseing • Student Housing
- Senior Houseing



## Shopping

- Plaza • Open • Space Shopping
- Outlet • BigBox • wholesale Center



## Expo

- Convention • ExpoCenter

## Education Center



- College • Aviation School
- Private School • Public School
- Professional School



## Sport Center

- Indoor Facility • Bowling Area
- Sport Club • Golf • Sport School



## Logistic and Cargo

- Rental Sore • Game Center



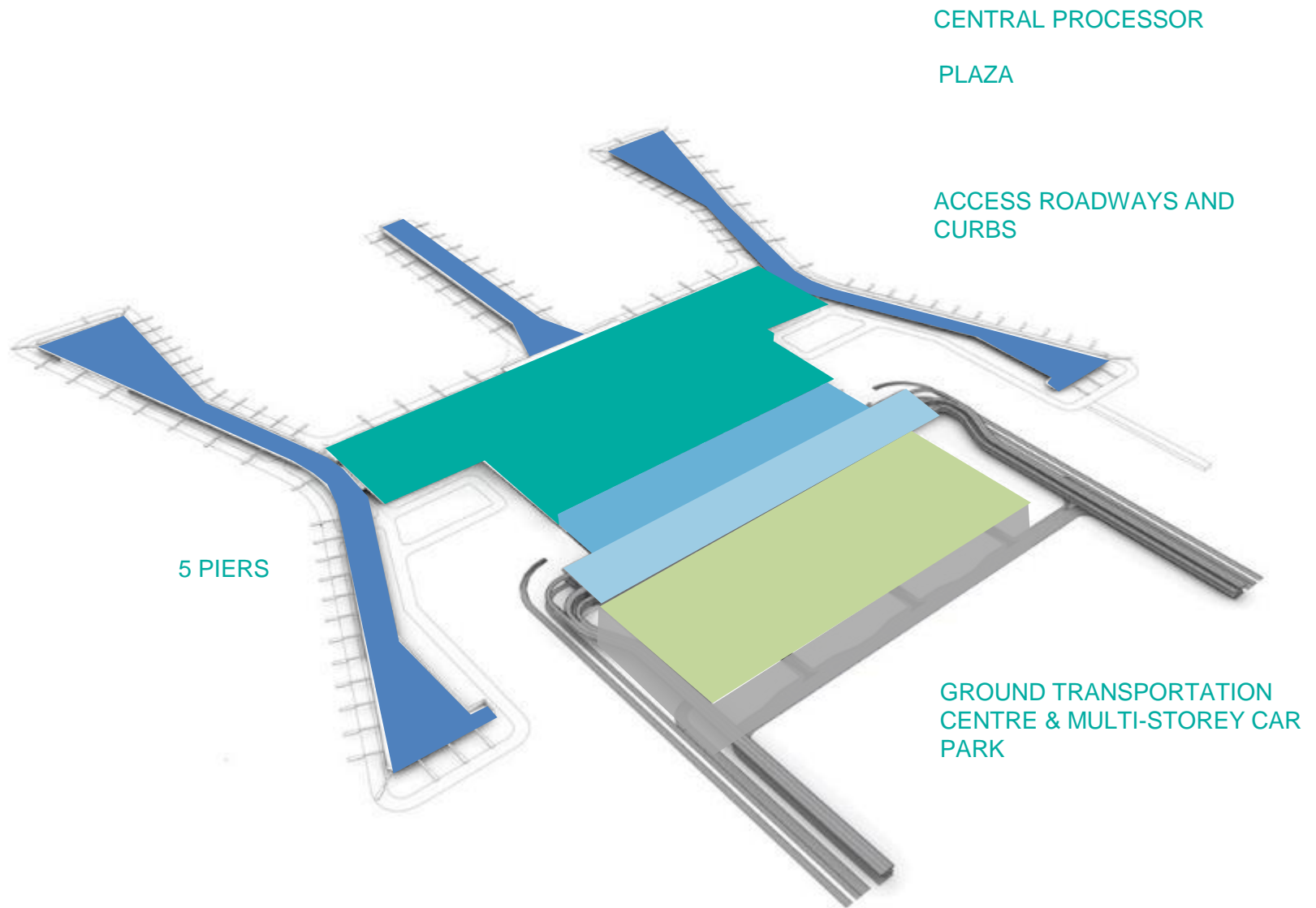
## Medical Center

- Policlinic • Hospital
- Special Clinic • Animal pound



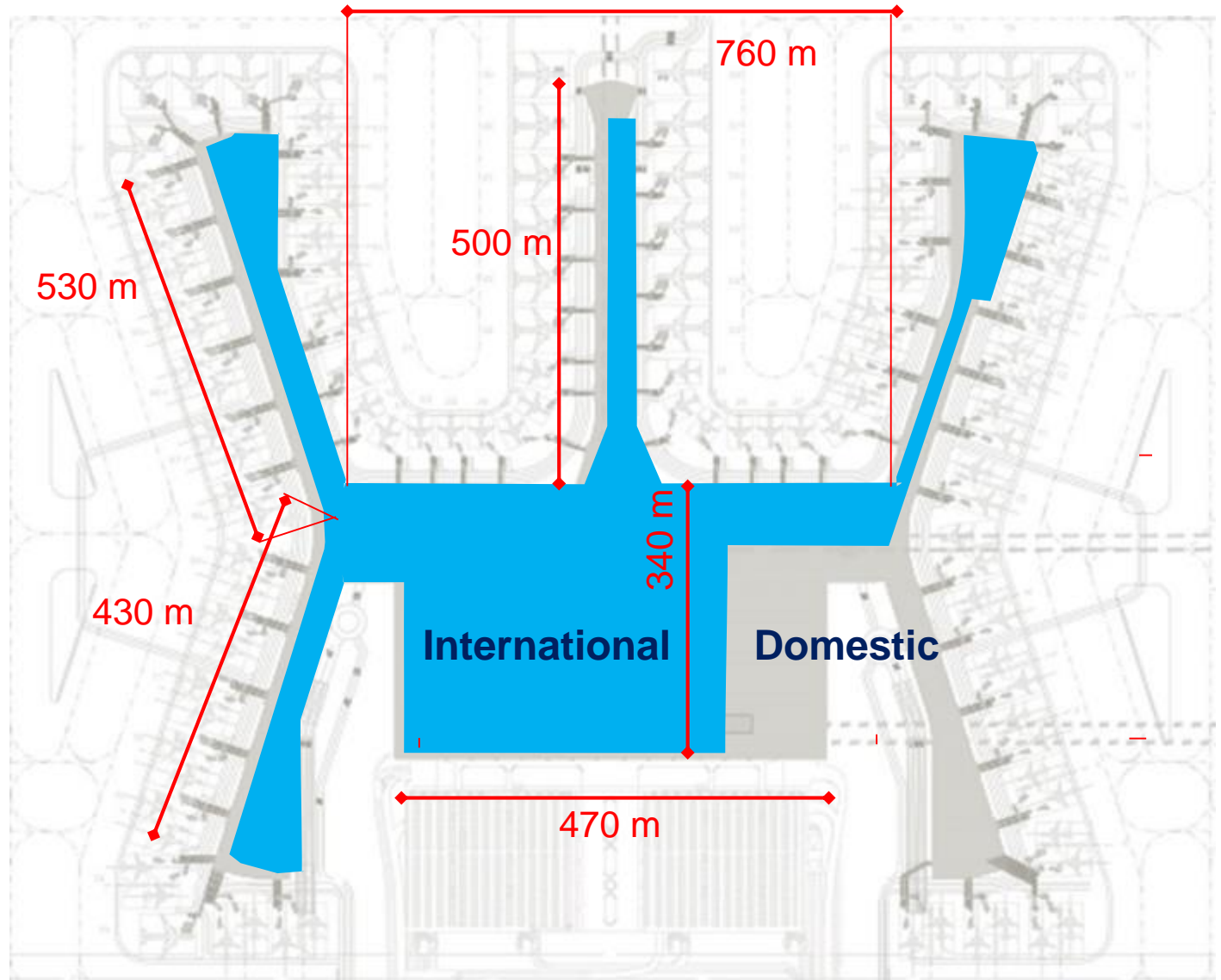
## Thema Park

- Sience Museum • Botanic Park
- Indoor Thema Park • ThemaPark Hotels



## Passenger Aircraft Stands

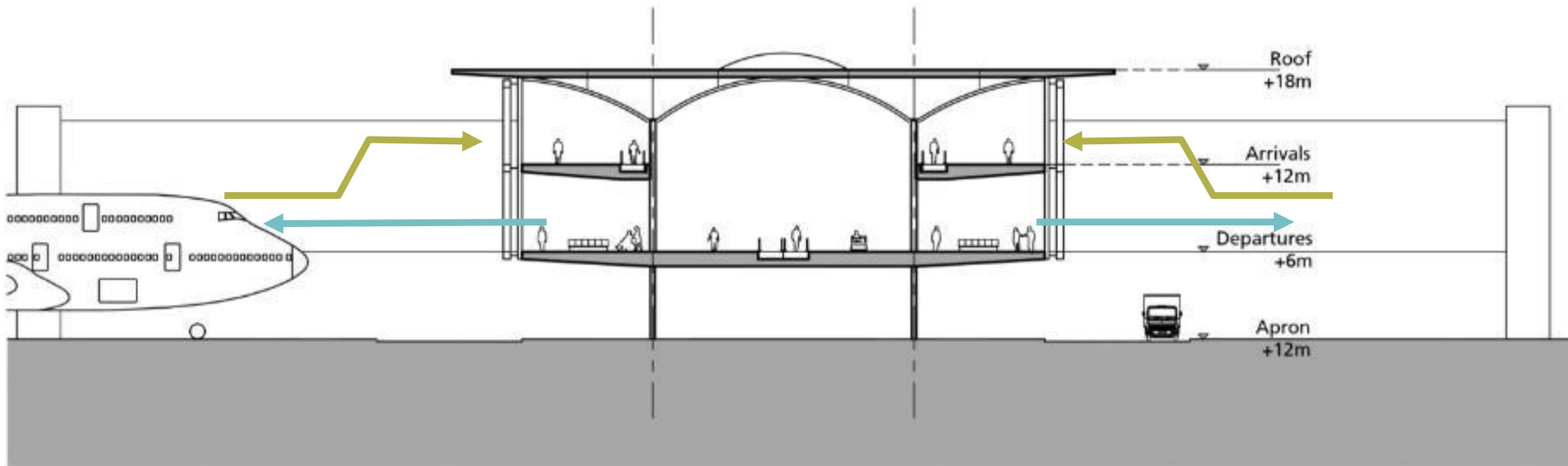
- Contact 114
- Remote > 70
- Availability of
  - Code E MARS
  - Code F MARS



# Departing Passenger flows







- Departing Passengers
- Arriving passengers

# Arriving passenger flows





Moving away from conventional check in, INA is considering a flow through concept with number of self check-in & bag drop counters, in town check in, use of permanent bag tag



Implementing iBeacon to improve way finding for the passengers



Mobile Apps - Interactive Displays to provide passengers with ready information on their locations, directions and journey times, signage translation, retail and F&B opportunities



Next generation security – biometrics and enhance levels of screening



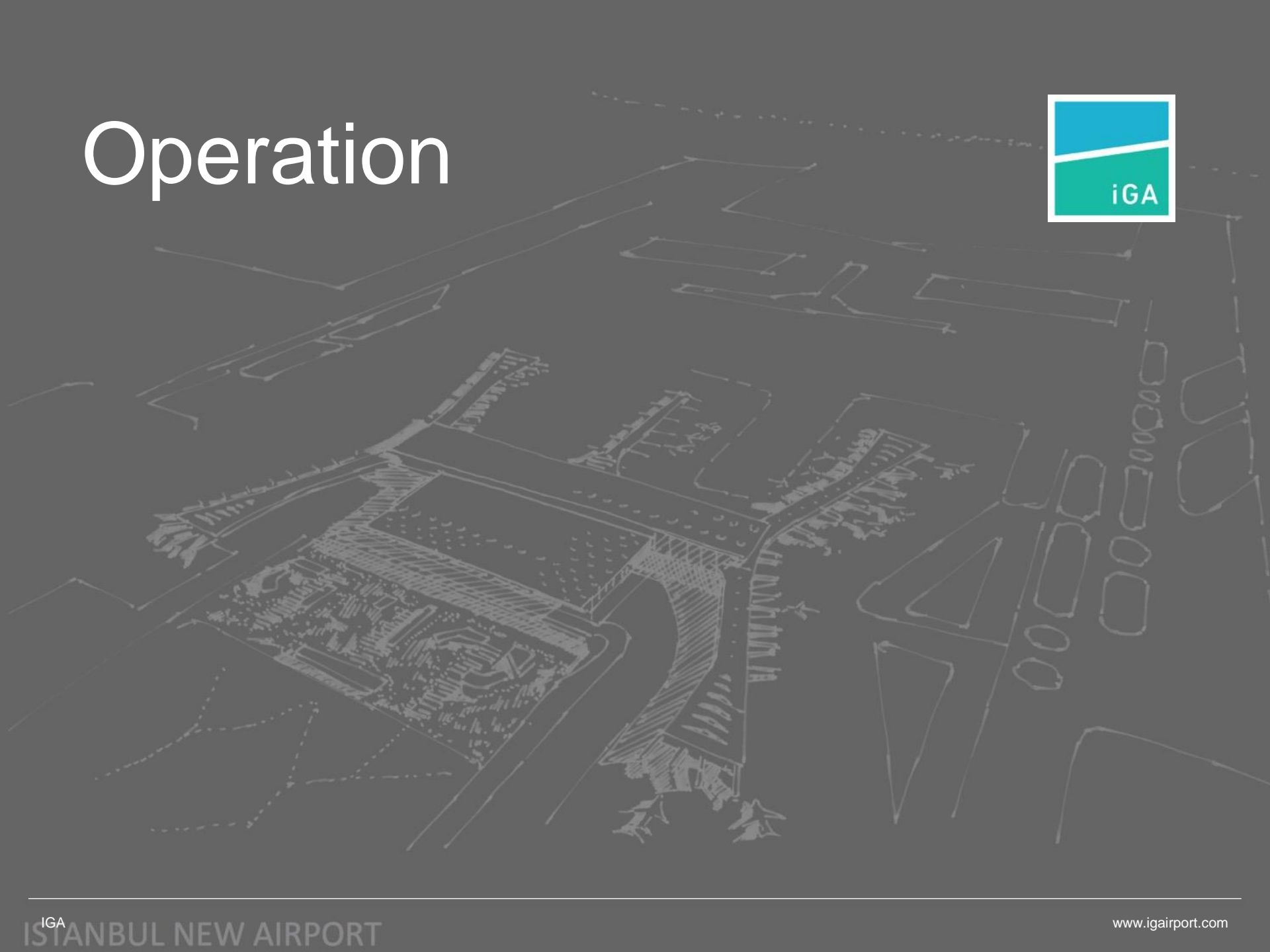
Formulating the strategies how best to implement e-gates for passport control and boarding at INA

# Car Parking and GTC

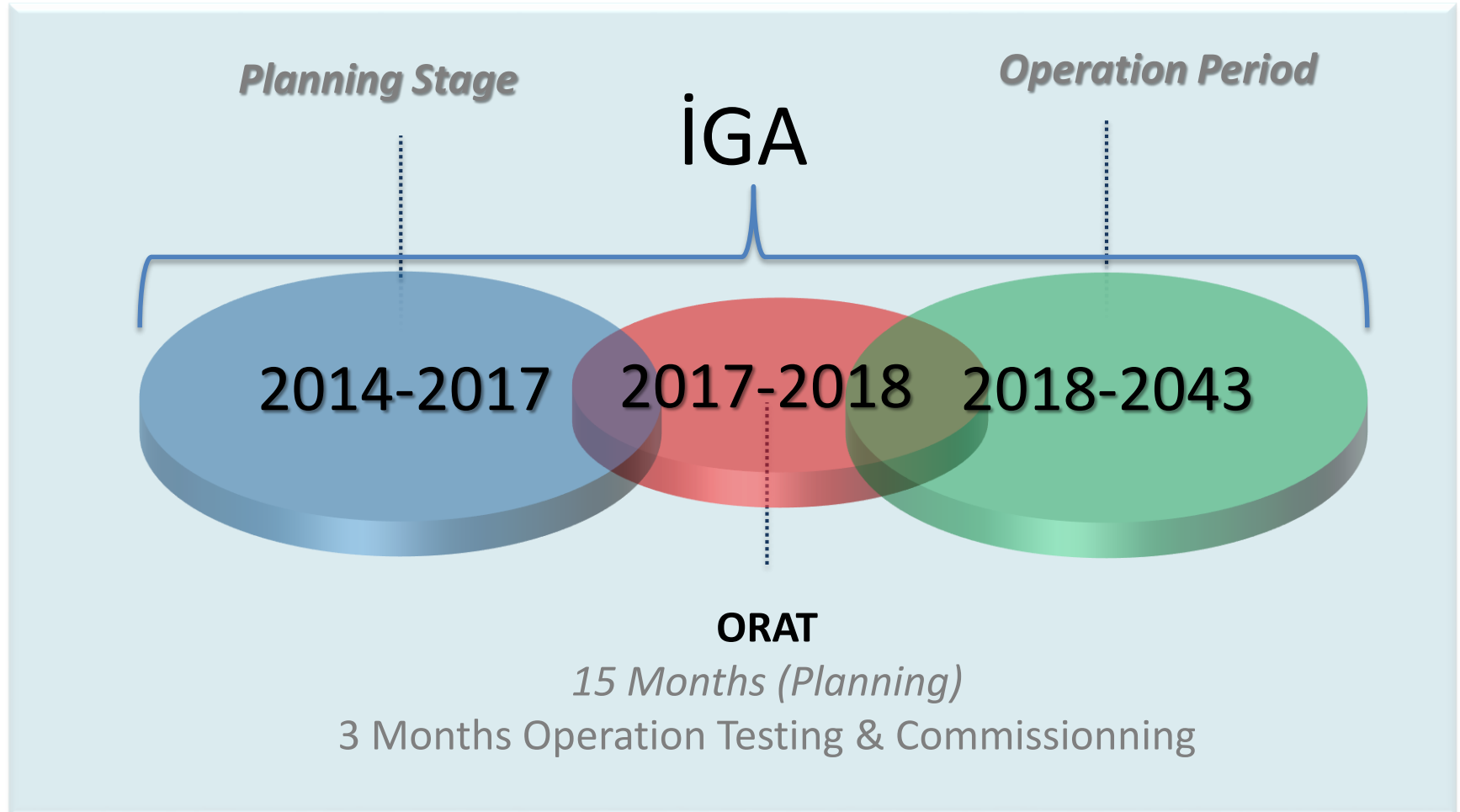




# Operation



Process to perform the operations by IGA

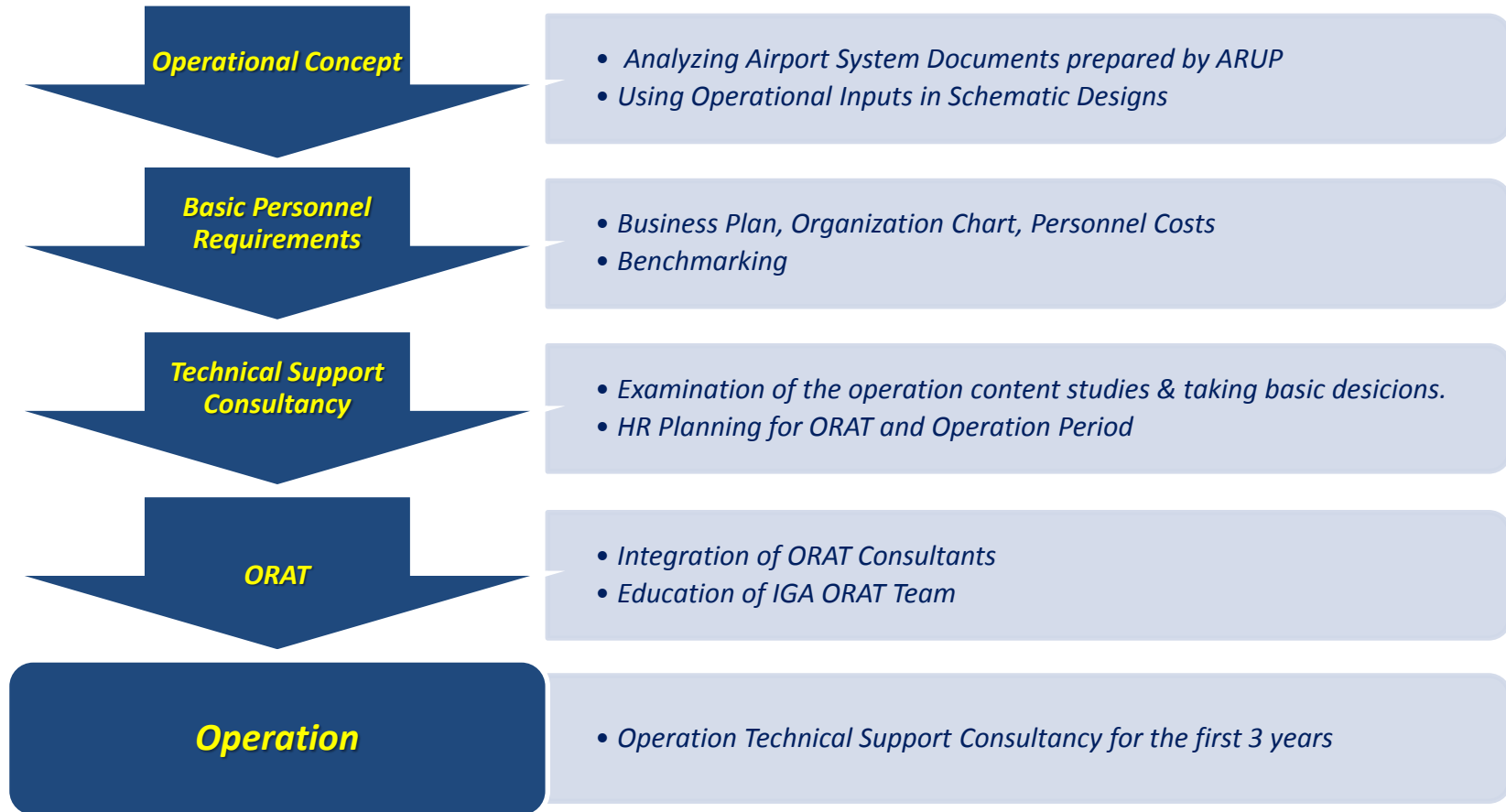


*5 Year Technical Support Contract is signed with Copenhagen Airport Operator (CPH) ve Incheon International Airport (ICN) on 17.06.2015*



**J.V.**







# How it is going to look like?



# Bird's Eye View – Phase 1





# Departing Pax – Entry to the terminal



# Departing Pax – Check-in area





# Departing Pax – Passport Control





# Departing Pax – Duty Free / Retail / F&B









# Departing Passengers entrance to piers





# Pier View – departures and arrivals



# Arriving Passengers – baggage claim





# Arriving Pax - Plaza



Thank you...

iGA