

Updates on Japan's INTERNATIONAL AVIATION POLICY

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Overview

Capacity Increase at Tokyo Metropolitan

2010.10.13 Agreement with local communities (capacity increase of NRT)
2010.10.21 HND D R/W Open
2010.10.31 Inauguration of International Flight at HND

Further capacity increase
200 → 360 (Int'l Slots)
(thousand/annually)

Bilateral Negotiation for Open Skies

2010.10.25 First Open Skies including Tokyo Metropolitan Airport

Commence new round of bilateral negotiations seeking for Open Skies

Deregulation

2010.10.22 Relaxation of Pricing Regulations
2010.10.29 Relaxation of Charter service

Implementation and Further Relaxation of Regulations

Open Market Access
Expanded International Network

Facility Improvement of Tokyo International Airport (HND)

■ 2010.10.21 Opening of D runway, International PTB, and Related Facilities

New Int'l PTB

Cargo Warehouse



Opening Ceremony for 4th D R/W and International PTB

Connecting Taxiway × 2

D Runway

Pier Structure (1,100m)

Reclamation (2,020m)

Inauguration of International Scheduled Flights at HND

- International scheduled services started on 31st October 2010 successfully.
- 20 airlines will start their services one after another, and the network will be expanded up to 11 countries/regions, 17 cities, 54 flights per day in W2010.



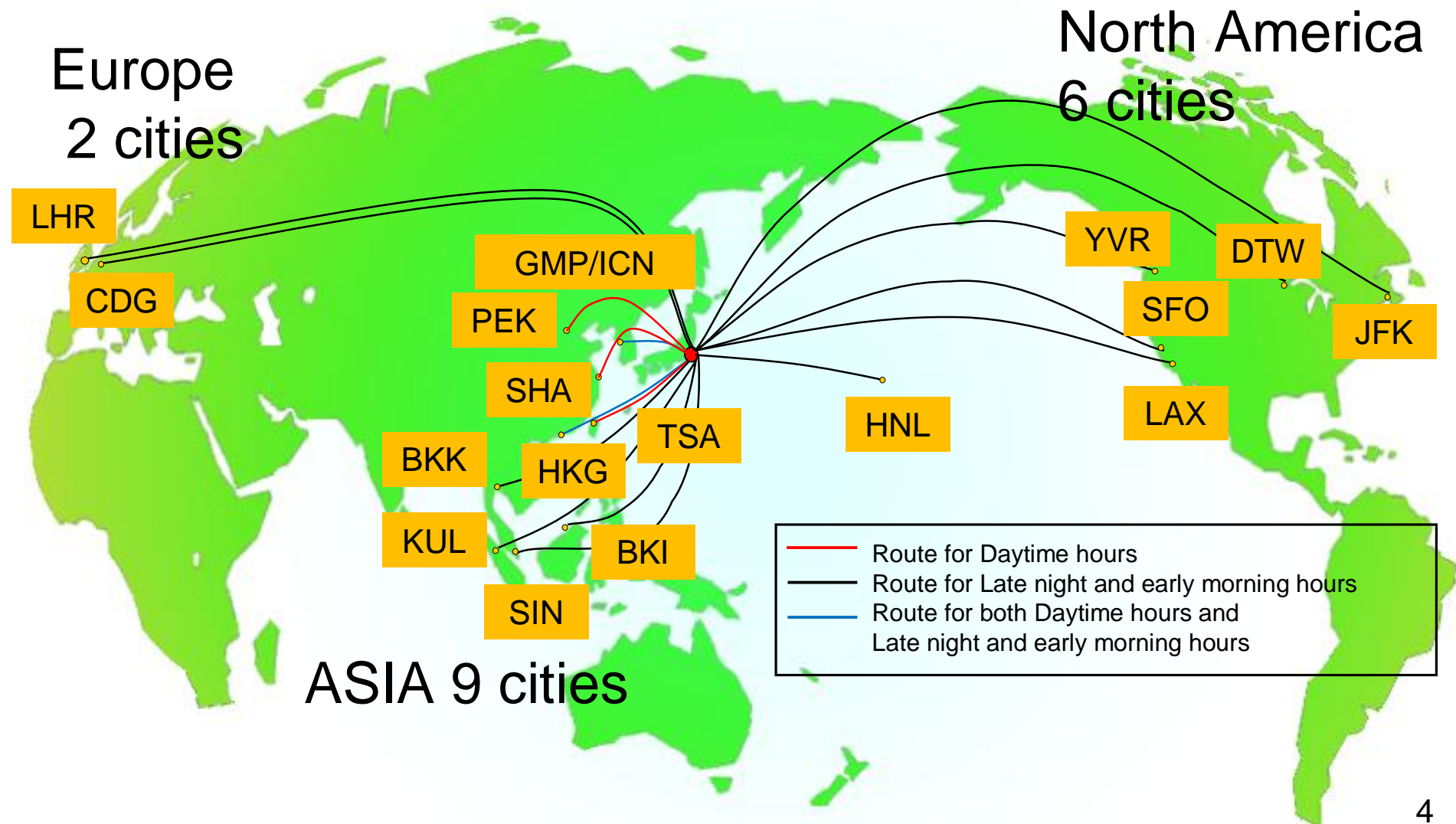
JAL first flight for SFO (JL002)



ANA first flight for LAX (NH1006)

International Network from HND (2010W)

■ 17 cities will be linked with Haneda (54 flights / day) during W2010.



Capacity Increase for International Flight at HND

■ Slots for international scheduled flights will increase from current 60,000 to **90,000** in total, as early as 2013, pending implementation of safety measures, if necessary, and completion of the terminal expansion project.

Daytime
(0600-2255)

30,000 slots → **60,000 slots**

Late-night and
early-morning
hours
(2300-0555)

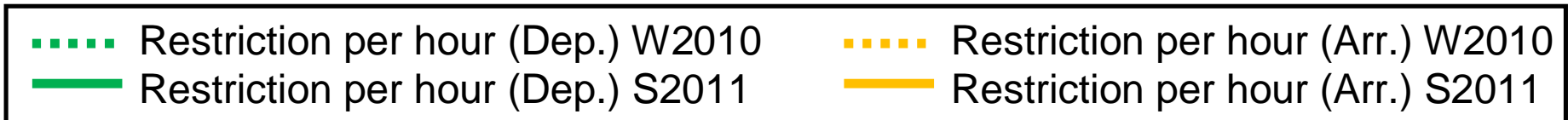
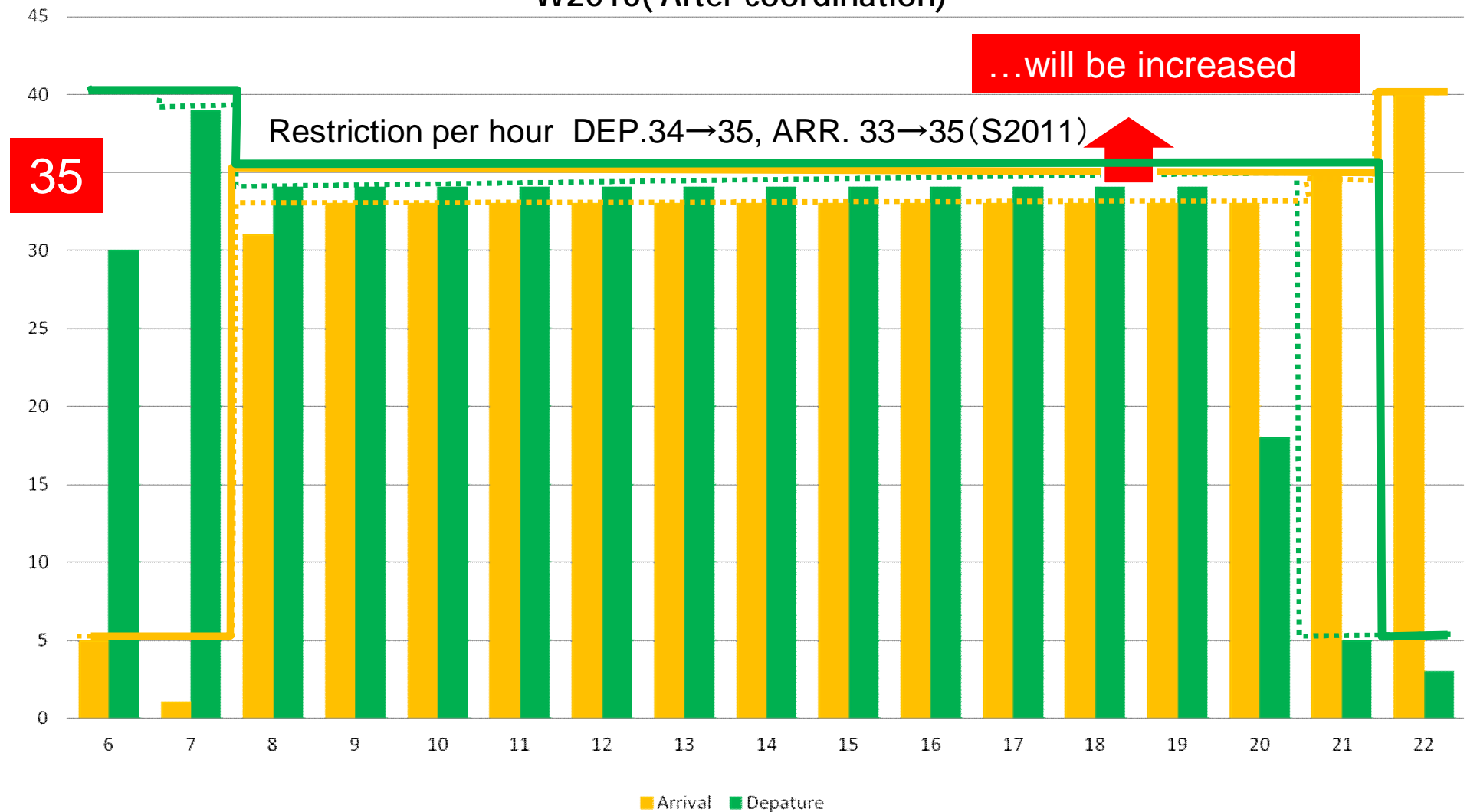
30,000 slots

Future Measures

- ▶ Expansion project of the new int'l passenger terminal will be implemented shortly.
- ▶ Movement restrictions will be relaxed.
- ▶ Daytime slots will be exclusively used for international flights on high-demand, business routes connecting cities of the world with Tokyo.
- ▶ Added frequencies will be allocated through bilateral consultations. Series of consultations will start around the end of 2011 or the beginning of 2012.

Relaxation of Movement Restrictions at HND

W2010(After coordination)

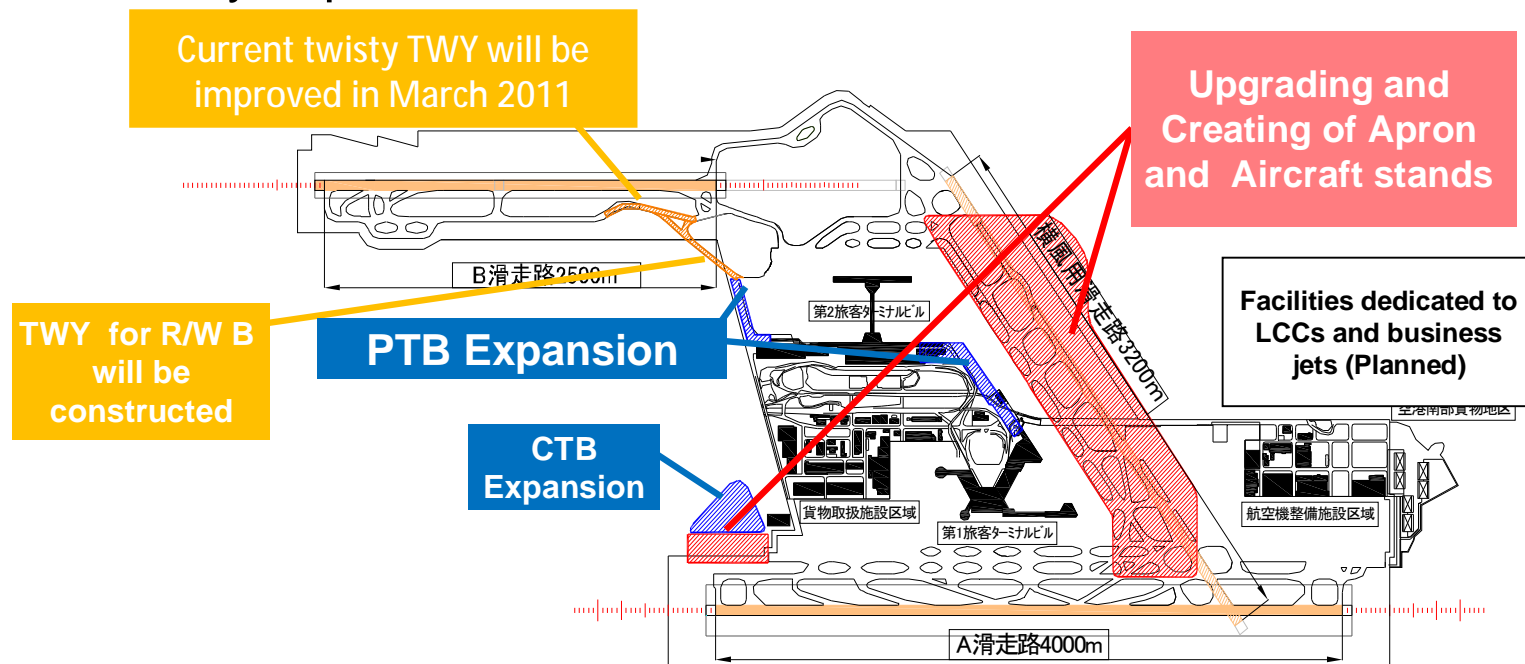


Agreement with Local Communities for Capacity Increase at NRT

■ On 2010.10.13, Narita International Airport Corporation (NAA) reached an agreement with local communities for the capacity increase from current 220,000 to 300,000.

Future Measures

➤ Various facility improvements will be initiated.



- Movement restrictions will be relaxed.
- Utilizing upgraded facilities, global and domestic network will be further expanded, along with the realization of various services by LCCs and business jets.

Capacity Increase Plan at NRT

IATA Season		Annual Capacity	Planned Facility and Operational Improvement
2010	W	220	
	S		
2011	S	Gradual Capacity Increase	Relaxation of movement restrictions
	W		Simultaneous operations at parallel R/Ws
2012	S	Gradual Capacity Increase	
	W		
2013	S	270	New taxiway opens
	W		

Straightening of Taxiway (R/W B)

Additional parking stands

Relaxation of movement restrictions

Simultaneous operations at parallel R/Ws

Additional parking stands

New taxiway opens

Additional parking stands

(thousands per year)

300*

*as early as 2014, pending substantial investment in A/P facilities based on NAA's managerial decision.

Capacity Improvement at NRT

IATA S2011

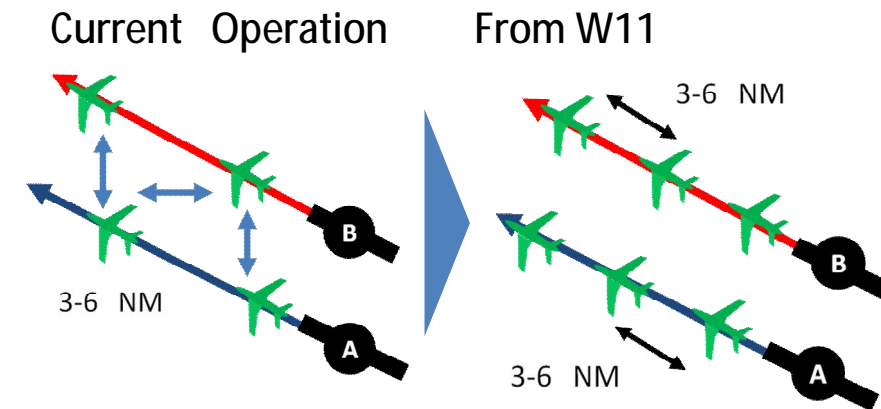
Sliding scale per 30 minutes
will be revised

Sliding Scale per 30 Minutes (Applied to S11)

A + B Runway		Total A + B Runway Movements
Arr.	Dep.	
8	16	24
11	15	26
12	14	26
13	13	26
14	13	27
15	12	27
16	11	27

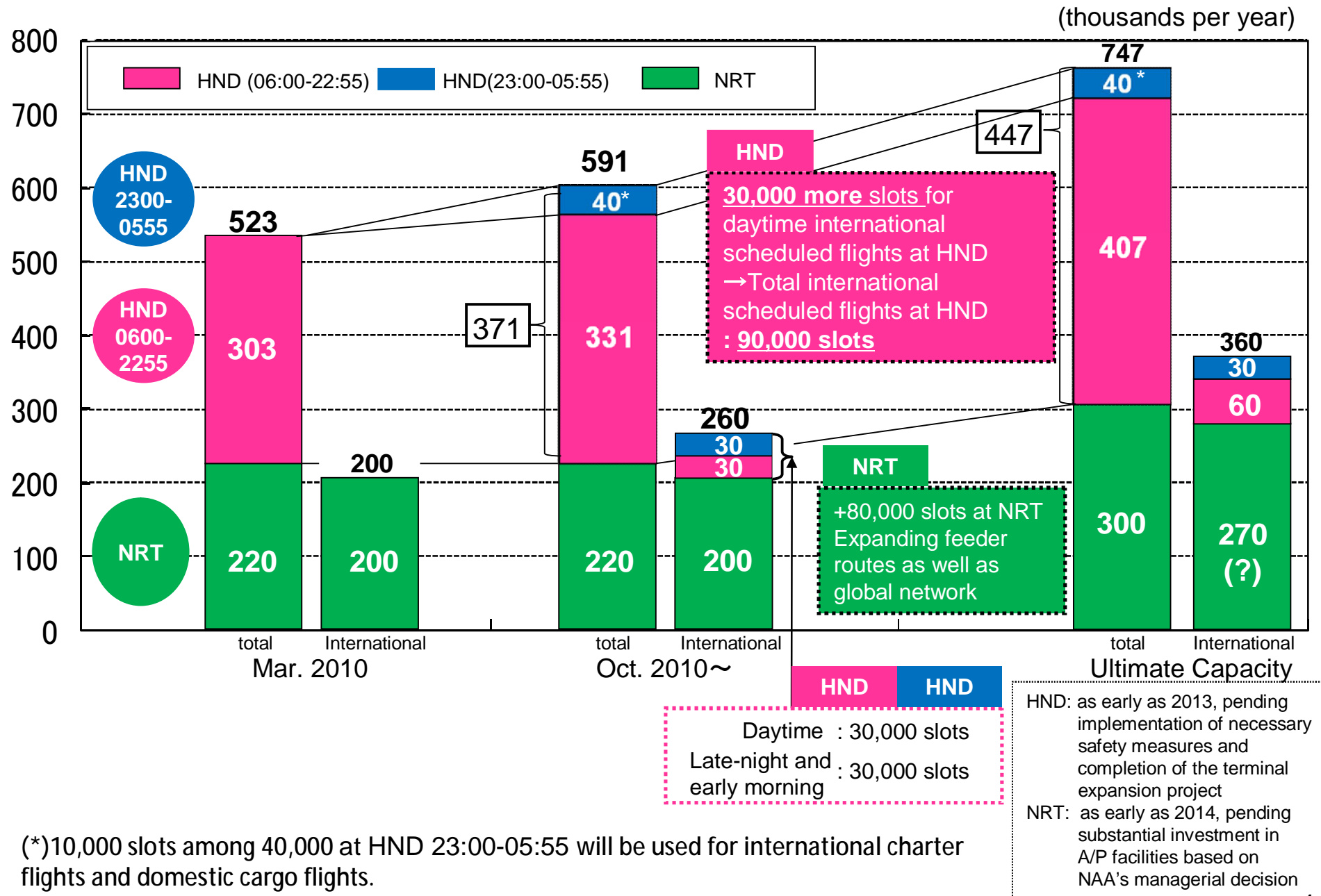
IATA W2011

Simultaneous operations at parallel
R/Ws will be introduced



- Drastic increase of hourly limit
- More desirable time slots in peak hours

Capacity Increase of the Tokyo Metropolitan



Japan – US Open Skies (2010 MOU)

On Oct 25th, 2010, Japan and the United States governments signed “the 2010 MOU,” which is the first Open Skies including Tokyo Metropolitan Airports for Japan.

1.Routes

No restrictions on points in Japan and in the U.S., intermediate points and points beyond.
(Restriction on 7th freedom traffic rights)

2.Number of Flights

No limit on number of flights.
(Airlines need to secure slots in accordance with IATA WSG.)

3.Number of Designated Airlines

No limit on number of designated airlines.

4.Code-sharing Agreement

No restrictions on code-sharing agreement
Among airlines of same country, the other country, and/or third country.

5.Prices

Limit on government interference except for those cases including unreasonably discriminatory prices, and regulatory burden will be minimized.



Relaxation of Rules & Regulations on Int'l Aviation Business

To maximize the effect of Open Skies agreement, Japan will immediately implement new rules & regulations on int'l charter flights and tariff/pricing.

New Regulations on Int'l Charter Flights

- “Seat-only-sales for individual passengers” shall be allowed Up to 50%, regardless of on-line or off-line.
- Forwarder charter and split charter shall be allowed (including NRT and HND late night hours) when;
 - Open Skies is agreed with the country concerned
 - Reciprocity on charter rule is ensured
- “Non Objection Letter” shall be no longer required for cargo charter flights by airlines of third countries.

【Already in effect since Oct. 31, 2010】

New Regulations on Tariff/Pricing

- Filing for approval shall be required only for the most expensive airfare applied under each sales condition, enabling airlines to flexibly set and change airfare based on market conditions.
【Already in effect since Oct. 31, 2010】
- Airlines shall be required to show the total price, as well as price of each component that passengers must pay, such as airfare, surcharge, PSFC, and taxes.

【Will be in effect from S2011】

Realizing World-Class Hub Operations

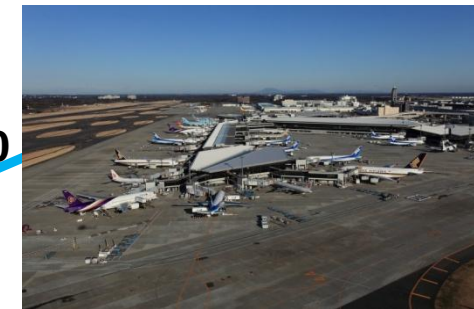
Japan will make its best efforts to realize world-class hub operation at its four major airports by creating market-oriented business environment.

Kansai International (KIX)



Opened in Sep. 1994
Parallel R/W:
4,000m/3,500m
24/365 operation :
No curfew

Narita International (NRT)



Opened in May 1978
R/W: 4,000m/2,500m
Operation :6:00-23:00

Chubu centair International (NGO)



Opened in Feb. 2005
R/W: 3,500m
24/365 operation :
No curfew

Tokyo International (HND)



Opened in 1931
R/W: 3,000mX2,
2,500m X2
24/365
operation :
No curfew

Thank you for your attention.

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