

Policy Brief 2/2017

For decision makers in politics, media and business

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Dear Reader,

On behalf of the Lufthansa Group, I would like to congratulate the new and re-elected members of the 19th German parliament, and wish them success in facing the upcoming challenges of our country. Be it in foreign and security policy, economic and social policy, or transport and environmental policy, we are facing landmark decisions everywhere.

The dominant topic in German aviation continues to be the insolvency of Air Berlin, which has also shown how intense the competition really is for Germany's airlines. Here, 160 airlines are vying for customers on domestic routes, flights to European destinations and around the world. In hardly any other country is competition so fierce. The low-cost sector is securing considerable shares of the market, which is leading to a decline in revenue per-ticket overall. At the same time, the state-owned airlines in Asia and in particular the Gulf States – and increasingly in Turkey – are continuing their predatory competition. The consequences have been felt not only by Air Berlin. In May, the long-established Italian airline Alitalia was forced to declare bankruptcy. In early October, British Monarch Airlines was hit – tens of thousands of passengers were left stranded across Europe. Other airlines are being forced to make painful cuts. Accordingly, the Spanish airline Iberia is letting around 1,000 employees go.

Competition intensity will continue to increase in Europe as well as in Germany for the foreseeable future. As such, I consider Lufthansa to be well-equipped. Firstly, we are making use of the opportunities of digitalization like no other airline worldwide and are creating innovative offers. Secondly, we are receiving one factory-new, fuel-saving aircraft almost every week in the ongoing year. This helps us save our fuel consumption and our costs, and at the same time we are making an important contribution to climate protection. And thirdly, we have the best staff any airline worldwide could dream of. The almost 130,000 employees – of which almost 70,000 work in Germany – are crucial to the success of the Lufthansa Group. We want to continue to offer them secure jobs and fair working

conditions in the future. On our future growth trajectory, we are able to offer an additional 6,000 people career prospects in 2018 alone and, in that interest, we are investing more than EUR 3 billion.

The Lufthansa Group is and will remain committed to the values of a social market economy. This is not self-evident everywhere in the international aviation industry. After the previous parliamentary term ended with a bang from the perspective of aviation policy, we hope that the evident political energy will be sustained in order to end unilateral taxation decisions or to dismantle structural burdens of domestic air traffic, because aviation links people and cultures and thus contributes to an understanding between nations, prosperity and liberty. With this in mind, I look forward to working with the members of the German Bundestag and wish them much success in the tasks ahead.



Carsten Spohr
Chairman of the
Executive Board and CEO of
Deutsche Lufthansa AG



Air Berlin insolvency:

The German market remains fiercely contested

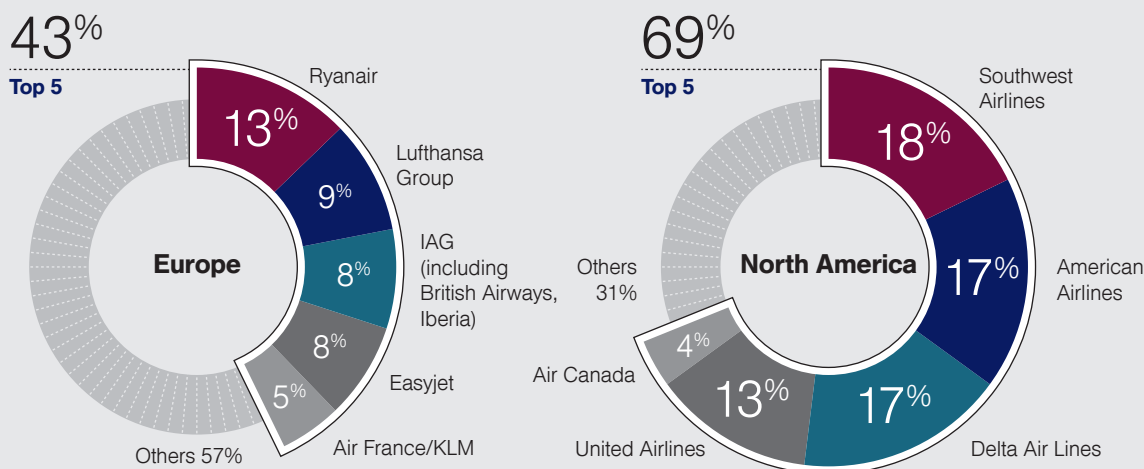
Subject to approval by the competition authorities, the Lufthansa Group will purchase parts of the Air Berlin Group. The Group will invest EUR 1.5 million and hire 3,000 new employees. This is good for Germany as an aviation location, especially as competition intensity in Germany and Europe continues to be extremely fierce.

Size a major factor in aviation

Airlines have to invest millions of Euros in fuel-saving and quiet aircraft. This becomes all the easier to do, the more efficient they operate. Here, fleet size and passenger numbers are important parameters. A comparison with the US shows, however, that Germany's and Europe's aviation markets are extremely fragmented – a further consolidation is thus unavoidable.

Market shares of airlines in Europe / Market shares of airlines in the US

Percentage of passengers flying from, to and within Europe/North America, incl. long-haul flights



A major Irish competitor in particular is warning of the ostensible threat of market dominance by the Lufthansa Group and increasing prices. A contrary indication is that there has been fierce competition in Europe and Germany for years – in Germany alone, 160 airlines are competing for passengers. As a result, ticket prices have continued to drop. This competition will go on, even after the exit of Air Berlin from the market. And: German and European competition regulators will closely examine any transactions.

No market dominance foreseeable

Together, the Lufthansa Group airlines comprise a market share of 34 percent in Germany; Air Berlin has 14 percent. The Lufthansa Group is interested in acquiring only a part of Air Berlin. This makes it clear that its market share will lie permanently and clearly under 48 percent – the market share of Ryanair in Ireland.

Special role for feeder traffic

In a market assessment, it is also important to consider that almost two thirds of Lufthansa passengers are travelling internationally on their domestic flights. For example, for

passengers flying from Shanghai via Frankfurt to Hamburg, the domestic route is part of international travel. Those who are complaining about the alleged market dominance of Lufthansa on domestic German flights would have to subtract this 60 percent of passengers.

Intercontinental transfer passengers, just like European transfer passengers, have a wide selection of different offers: From Berlin to Bangkok, a passenger can choose from ten different airlines and transfer in Amsterdam, Doha, Helsinki, Istanbul, Frankfurt, Cologne, London, Moscow, Paris, Vienna or Zürich. From Düsseldorf to Miami, passengers even have 14 different transfer options available.

Ryanair shines with polemics

There is nothing but polemics to be heard from Ryanair, the largest European airline in terms of passenger numbers. The Irish airline chose not to take the opportunity to submit its own offer in order to show responsibility towards the German market. They are obviously only interested in media attention, which is intended to distract from their own serious problems.



Air traffic rights: Maintaining fairness in aviation

There are vocal calls from interested parties to roll out the red carpet to highly subsidized state-owned airlines from all over the world – whose employees however have to make do without any minimum social standards – and to extend air traffic rights. This is absurd: These rights are the only bargaining chip for the EU and the Federal government to retain a balance in global aviation, as air traffic is not subject of the rules of the WTO.

State-owned airlines are already flooding Germany today

Airlines with high levels of state support are already pressurizing Europe today with huge excess capabilities. For example, Turkey: Between 2006 and 2016, Turkish Airlines expanded its capacity to Germany by 116 percent, in order to construct the world's largest hub in Istanbul at the gateway to the EU and to operate it with travelers from the EU. There are also no night curfews in place here. A clear mandate by the Turkish government – disproportionate and displacement-oriented capacity growth as a reason of state.

Another example, Dubai: Emirates, strongly subsidized by the state, draws away 2.4 million intercontinental passengers from German airports every year. For this, the state-owned company employs approx. 230 people in Germany. By comparison: The Lufthansa Group employs close to 70,000 people in Germany.

Maintaining mutual advantages through air traffic

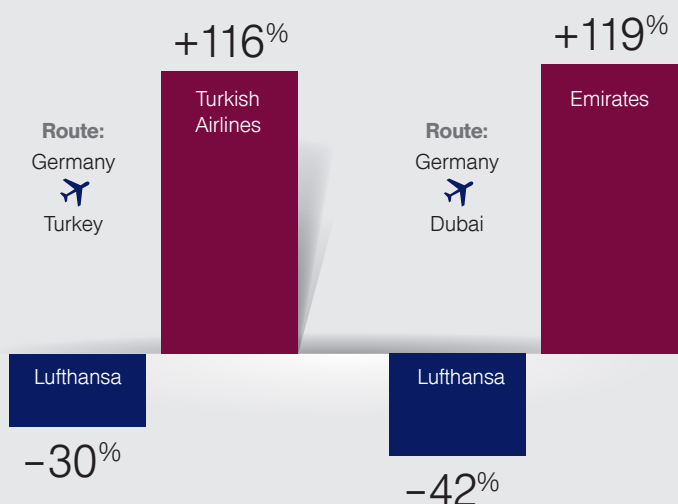
Major Asian players are demanding more take-off and landing rights in Germany, but they are not prepared to open their markets in return, for example to grant slots at key airports. The demand for additional take-off and landing rights without access to their own infrastructure contradicts the elementary premise of reciprocal – that is, mutually beneficial – aviation agreements.

Air traffic rights: Globally valid rules

In multilateral or bilateral agreements, nations regulate in particular how intensively airlines may transport persons or goods between countries. Because air traffic is exempt from the WTO, aviation agreements – together with European regulations – are the only lever available to ensure market behavior that, to some extent, conforms to competition.

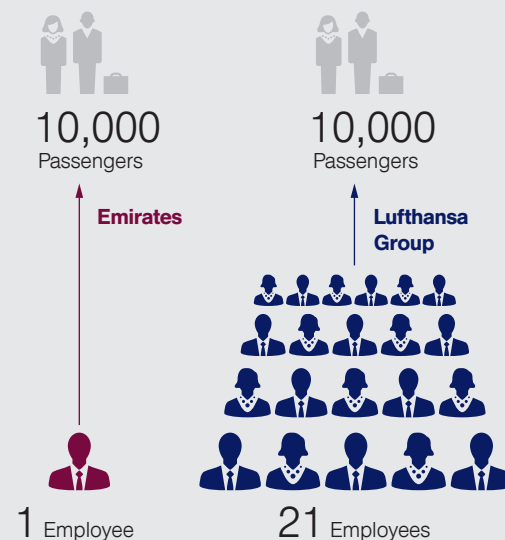
Foreign airlines crowding out by means of excess capacity

Seating capacity progression from 2006 to 2016



Source: OAG, company-own calculations

Staff numbers per 10,000 passengers in Germany

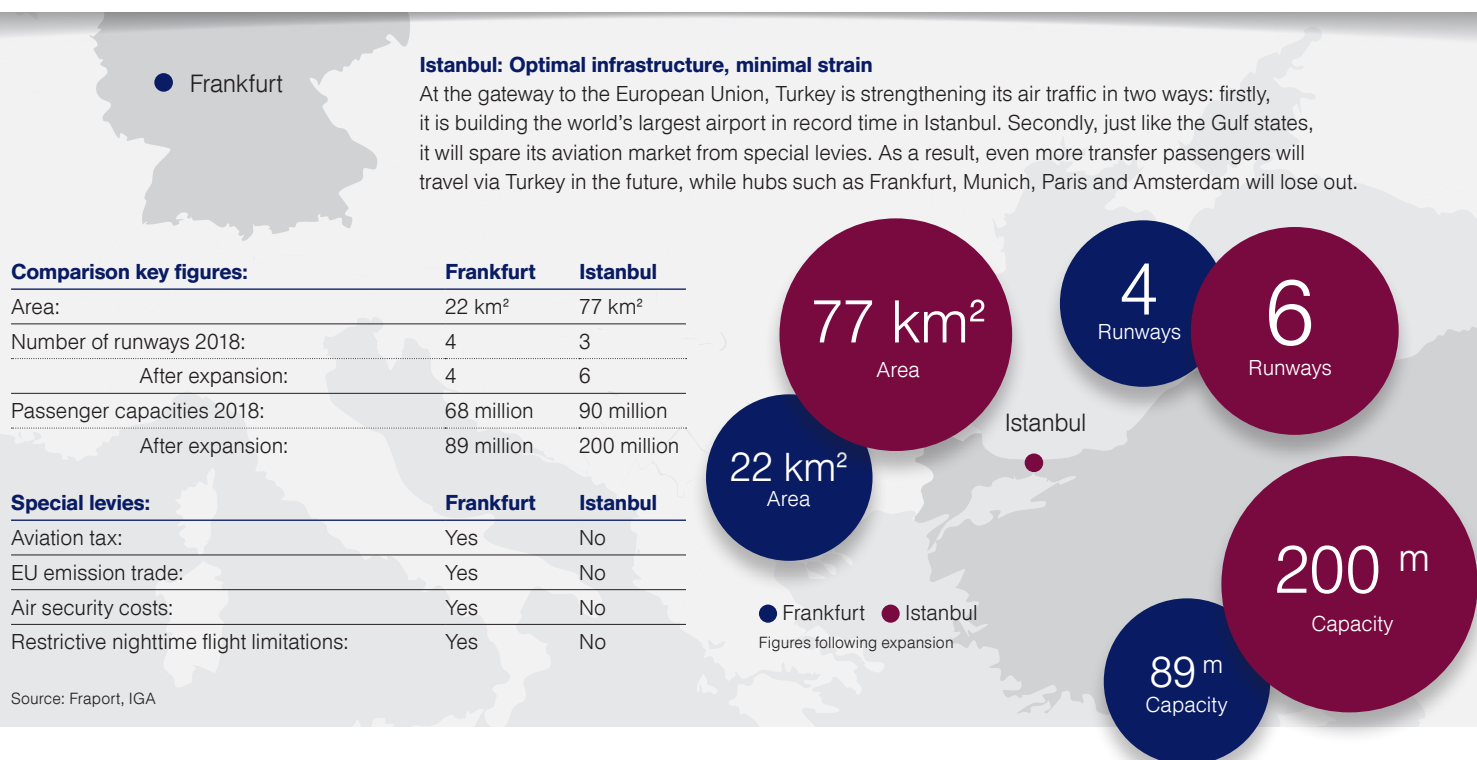


Source: OAG, Emirates, company-own calculations



Europe's air traffic: Airline industry in upheaval

Europe's air traffic is changing fundamentally. Four developments in particular are shaping the industry.



1. Fleet growth in the Gulf states

There is also upheaval at the Gulf airlines. But this should not hide the fact that they are continuing to expand their aircraft fleets. Thus, Emirates is expecting 45 new Airbus A380. Currently, the state-owned airline is operating 97 of these wide-body aircraft. In comparison: all European airlines together have a total of 36 A380. The situation is similar for Boeing's wide-body aircraft 777X, which is due to be delivered starting 2020. Emirates has ordered 150 such aircraft; the Lufthansa Group has only ordered 20. No doubt: Emirates continues to focus on the displacement of competing airlines from the EU and the US.

2. Low cost airlines with market increases

According to the latest calculations by the German Aerospace Center (DLR), low-cost airlines reached a new record high in Germany with 518 destinations in last year's winter flight plan. The highest growth rate was recorded by Irish Ryanair with 25 percent. At the same time, ticket prices are increasingly under pressure: for a single domestic flight, they sank from an average EUR 64 to 107 to EUR 44 to 105. And the next shift in

the sector is already mapped out. Thus, more and more low-cost airlines are preparing to offer flights on intercontinental routes.

3. World's largest airport in Turkey

In 2018, Istanbul will open its new airport. Initially, capacity will cover 90 million passengers per year; in the next few years, this is set to grow to 200 million. As such, Istanbul will become the world's largest airport and will push London, Paris, Frankfurt and Munich well into the shadows. Also, due to nighttime flight bans, strict environmental requirements or comprehensive work protection law – things common in EU countries – are of little importance in Turkey.

4. Cross-shareholdings

In early September, Air France-KLM decided to conclude a very close cross-shareholding with non-European airlines. Delta Airlines and China Eastern will participate in French and Dutch airlines with ten percent for each. Air France-KLM, in turn, will take over 31 percent of the British company Virgin Atlantic. This will result in a first global network to bundle its forces on the North Atlantic market in particular.



Lufthansa to accept the challenge

The Lufthansa Group wants to continue to take an active role in shaping Europe's aviation market. The bankruptcy of Air Berlin, in addition to that of Alitalia, is only one example of the high level of pressure facing European aviation. Together with its subsidiary Eurowings, the Lufthansa Group will offer good and secure jobs for new colleagues. Accordingly, the company is working hard to further lower unit costs. This will create the necessary leeway for billions' worth of investments in the latest aircraft, attractive lounges and completely new digital products and services. At the same time, the Lufthansa Group is securing its international position through joint ventures with United, Air Canada, Singapore Airlines, Japan's ANA and Air China.

Still urgent: improve framework conditions

Europe's air traffic urgently needs better overall conditions to survive international competition. One-sided disadvantages must be deconstructed by policy-makers to enable a sustainable European aviation industry:

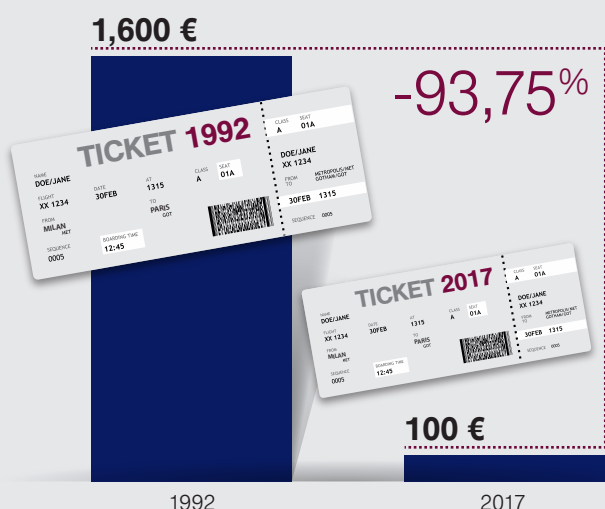
- **Abolish aviation tax:** The special levy places a burden on German airlines with over EUR 540 million per year. No other European country forces its own airlines to make such unilateral payments.
- **Lower air security costs:** Air security costs have risen since 2011 by EUR 270 million to just under EUR 700 million per year. They must be paid by the airlines, although this is a sovereign responsibility. The government must face up to its responsibility and bear its fair share of the costs.

- **Maintain operation periods:** German airports are today already subject to strict nighttime flight regulations.
- **End EU emission trading:** From 2021, the CO₂ compensation system CORSIA, agreed by the UN International Civil Aviation Organization (ICAO), will come into effect. EU emission trading for air traffic will thus become obsolete. Accordingly, the EU must end this stand-alone solution. Double payment obligations would be disastrous.
- **Ensure fair competition:** The strongly state-funded airlines in the Gulf states in particular, above all Qatar Airways and Emirates, are pursuing a clear and hard displacement strategy in Europe. The EU is urgently called upon, as part of the currently ongoing negotiations with the Gulf States, to create reliable competition supervision and penalty mechanisms in the event of illicit subsidies.

Germany and Europe are driven by exports and need strong domestic and globally operating airlines for reasons of economic sovereignty. Because, without its own network, the continent will become dependent on state-owned airlines from politically unstable regions. The newly-elected German parliament has the opportunity to strengthen considerably the working conditions for domestic airlines.

Dropping ticket prices on European routes

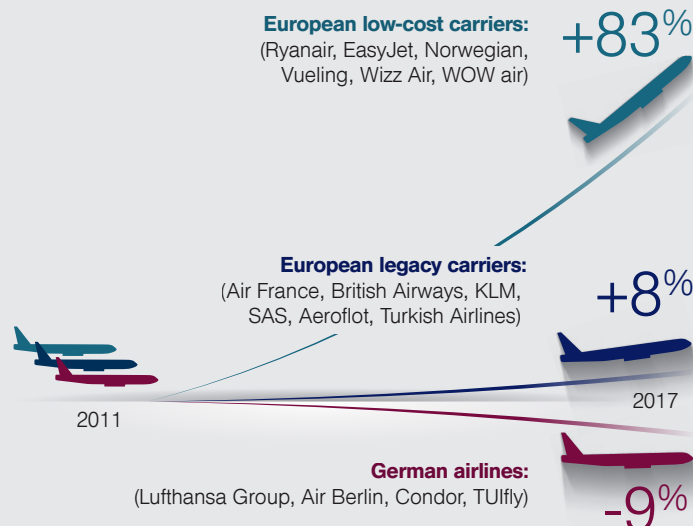
Minimum of ticket prices for a family of four on the route Milan – Paris



Source: European Commission

Low-cost ascent – domestic airlines descent

Growth from and within Germany (2011 – 2017), measured by flights



Source: BDL

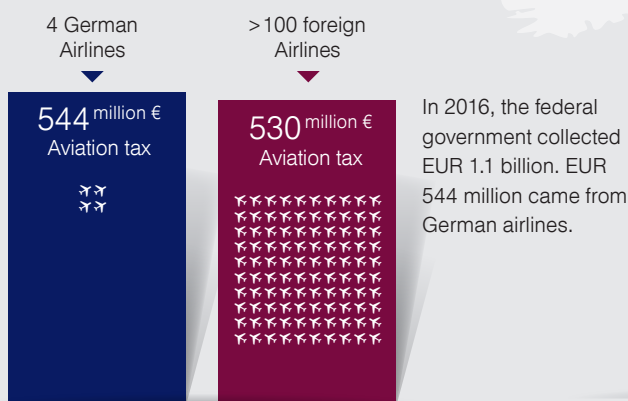


2018:

Austria to halve aviation tax – and Germany?

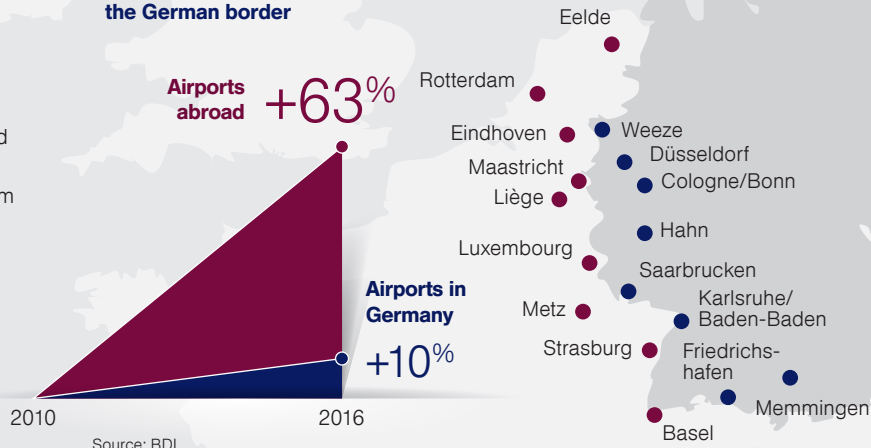
Since the introduction of the aviation tax in 2011, German airlines have paid a total of EUR 3.2 billion to the treasury. During the same period, the airlines at domestic airports have forfeited six percent of the market share. And Germany's former second-largest airline Air Berlin has declared bankruptcy – also due to this particular expense. There is an urgent need for action in this area.

German airlines are disproportionately affected



Source: BDL

Growth of airlines close to the German border



Source: BDL

In contrast to Germany, Ireland and the Netherlands, among others, have learned from the disastrous consequences for airlines and airports and have abolished the aviation tax. The success has proven the countries right: Over the two years following the 2014 abolition of aviation tax, Ireland's air traffic recorded a considerable growth in passengers of 13 percent. The Netherlands recorded a passenger plus of 10 percent in the first half of 2017 alone. And Amsterdam Schiphol consolidated its position as third-largest airport in Europe – until 2016, Frankfurt was at third place; the airport has since dropped positions.

Austria to halve aviation tax

Austria has also taken an important step in the right direction and will halve aviation tax in 2018. The market development is clear: Prior to the introduction of the tax in 2011, passenger numbers increased at an above-average rate. Since then, the figures have stalled. The lowest point in an EU comparison was reached in Austrian passenger growth in 2015: Among the 28 EU states and Switzerland, the country took 29th place. And in 2016, Austria took a modest place of 27th with a mini growth of 1.0 percent. The radical cut in aviation tax will once again create growth prospects.

Germany should follow

The pressure for action has also been recognized across parties in Germany. Thus, Volker Kauder, Chair of the CDU/CSU faction, said at the end of March: "Aviation tax will soon be a thing of the past". And Federal Economics Minister Brigitte Zypries, SPD, stated clearly in mid-August: "Aviation tax presents a unilateral disadvantage to German aviation companies. Its abolition would strengthen competitiveness". On federal state level, the pressure is also mounting. As such, the CDU/FDP government coalition in North-Rhine Westphalia will take the initiative to abolish the tax in accordance with the coalition agreement in the Bundesrat.

In the face of the continuing positive economic forecast, the federal government and the states will benefit from increasing tax revenue. This financial leeway should be used to secure growth and prosperity in the long term. The end of aviation tax would be a first important step in the right direction.

Abolish aviation tax – generate billions' worth of profit

According to a recent study by PwC, the abolition of German aviation tax would unleash a GDP growth of EUR 4.1 billion and create over 12,000 new jobs. And: The omitted aviation tax would be overcompensated by a factor of 1.08 in indirect taxes – good for passengers, the job market and the treasury.



Ryanair:

The “at others’ cost” airline

Ryanair wants to more than double its market share in Germany from currently 9 to 20 percent. As such, the Irish airline is pulling no punches: politics are mocked, municipalities and local politics are played off against each other, and staff is employed at a pittance – increasingly often on German soil.

“Ryanair is certainly not the kind of employer I would wish for.”

Tarek Al-Wazir, Hessen Economic Minister

“Ryanair is a company that makes huge profits at the cost of the municipalities, the taxpayers and its own employees.”

Michael Müller, Governing Mayor of Berlin, SPD

“It is unfair if crews with Irish contracts, with Irish working and payment conditions, fly out of Belgium.”

Frank Bsirske, Chairman of ver.di

“We are angry that Ryanair is failing to comply with the law and is not granting its passengers what they are entitled to.”

Andrew Haines, Head of the British Civil Aviation Authority, CAA

“Ryanair pilots want stable work contracts with direct employment.”

Jon Horne,
Vice President of the European pilot union ECA

“We were blackmailed repeatedly and had become a mere plaything of Ryanair.”

Michael Wolf, Lord Mayor of the City of Altenburg

“I maintain that we do not agree with the conditions under which Ryanair employs its staff.”

Heiko Kasseckert, Member of the Hessen state parliament

Billions in profits and social dumping – two sides of the same coin

Ryanair boasts being an extremely successful airline. And indeed: The company has made profits of approx. EUR five billion since 2011. On the backs of its employees: because Ryanair has always shirked its responsibilities as an employer and operates at the edge of legality. Thus, not only trade unions have criticized that some Ryanair full-time employees in Germany do not even receive the legally binding minimum wage. The establishment of works councils is systematically prevented. CEO Michael O’Leary: “We do not recognize the pilot union, so they are making life difficult for us. They can go to hell.”

The employment conditions of pilots are a particularly sensitive issue. According to media reports, they often work for Ryanair as bogus self-employed, which goes against valid law. Advantages for Ryanair: the contract workers are not entitled to paid leave; the company is not required to continue payment of pilots in the event of sickness, and it can terminate their contracts at will. Not only trade unionists, also flight physicians are highlighting the problems caused by the extreme pressure

Ryanair and the pilots – an ARD report

At the end of March, the German public TV channel ARD broadcast a noteworthy report on the employment situation of pilots at Ryanair.



Watch video



put on pilots. Because where traditionally employees can call in sick, Ryanair pilots, who are already paid below average, can face existential risk, if the numerous press reports are true. These employment circumstances are uniquely disadvantageous for the pilots.

Not a reliable partner for airports

But Ryanair is not only bad to its employees, it also takes money out of taxpayers' pockets. Thus, the airline regularly plays local authorities who have small loss-making airports against each other. At the launch of Ryanair in 2011 in Cochstedt, near Magdeburg, Michael O'Leary stated: "The formula is simple. When the costs go up, Ryanair will leave the airport."

In other words: When the subsidies stop flowing, Ryanair is gone. As such, the airline pocketed several hundred thousand Euros' worth of marketing grants per connection in Altenburg in Thuringia. The airport even invested in a second terminal for Ryanair. But this became obsolete only nine months after opening. Because when the state and the city no longer wanted to make any further advertising payments, Ryanair left. After that, Ryanair set up only 170 kilometers away in Cochstedt – and then also left this airport. Lübeck, Friedrichshafen, and Klagenfurt in Austria have also had similar experiences.

Ryanair makes the headlines

There are increasing signs that the ruthless business practices of Ryanair have met their limits. In late September, Andrew Haines, Head of the British Civil Aviation Authority (CAA), accused the airline of "permanent deceit" of passengers in the light of the cancellation of many thousands of Ryanair flights. Ryanair had not informed the passengers that they had the right to be rebooked onto other airlines. Shortly before, the European Court has ruled that Ryanair staff are entitled to bring employment-related legal disputes to the courts in which they have their home base. It will thus be far easier in future for employees to demand their rights. It is an open secret that there is growing unrest among the staff. According to press reports, for example, the pilots are in opposition: they are organizing and demanding better working conditions for all Ryanair employees. Public prosecutors in Germany and other EU countries are assuming tax and social security fraud behind the employment of bogus self-employed pilots for many years. Numerous Ryanair bases have already been searched.

Ryanair cultivates the reputation of low-cost airline. In view of their business practices, the name "at others' cost" airline would be more fitting.

State-sponsored expansionism

Ireland's debts total over EUR 200 billion. The debt per capital even clearly exceeds that of Greece. Nevertheless, the government grants Ryanair the lowest possible taxes and even completely waived the previously existing aviation tax despite the 2014 financial crisis. The airline is thereby granted even more leeway to increase profits, expand capacities and to displace further competitors in Europe.

Ryanair: 50 percent on everything – and more!

50% discount on Fraport-in-Frankfurt **airport charges**

50% lower **corporation tax** in Ireland

0% **aviation tax** in Ireland

0% contributions to the German **pension fund for bogus self-employed pilots**

0% contributions to the German **statutory health insurance fund for bogus self-employed pilots**

0% **continuation of payment** in the event of sickness for bogus self-employed pilots

0% **holiday entitlement** for bogus self-employed pilots

0% **protection from dismissal** for bogus self-employed pilots

0% **payments under collective agreements** for Ryanair employees worldwide

0% **trade union representation** for Ryanair employees worldwide

50%

0%

SUPER LOW COST



Framework conditions: Germany and Gulf states in comparison

State-owned airlines from the Gulf – in particular Emirates and Qatar – siphon off many millions of travelers from German and European airports every year, and increasingly steer the global passenger streams via their mega hubs. The governments in the United Arab Emirates and Qatar are massively supporting the predatory competition. The comparison shows that German airlines are having to assert themselves under far more difficult conditions.



		Germany	UAE/Qatar
Airlines	Billions' worth of subsidies	No	Yes*
	Market behavior i.a.w. air traffic agreements	Yes	No
	Private commercial	Yes	No
Taxes	Aviation tax	Yes	No
	Revenue tax	Yes	No
	Income tax for employees	Yes	No
Fees	Airport charges	High	Low
	Air traffic control charges	High	Low
	Air safety charges	High	Low
Environment	Emissions trading	Yes	No
	Noise protection	Yes	No
	Noise-related charges	Yes	No
	Nighttime flight ban	Yes	No
Labor market	40-hour week	Yes	No
	Protection against dismissal	Yes	No
	Trade unions	Yes	No
	Right to strike	Yes	No

*USD 42 billion of state support, aid and capital injections according to calculations by American Airlines, Delta, United Airlines



Telegramm

Vienna: Constitutional court lifts construction ban on the third runway

For many years, the Austrian economy has been fighting for the extension of the hub in Vienna, which is already running at full capacity during peak times. In late June, the Austrian Constitutional Court announced a new ruling in response to the ruling by the Federal Administrative Court. It clearly set aside the previous ruling of the Federal Administrative Court as being unconstitutional.

“The Federal Administrative Court, in its weighing of interests, incorporated in particular climate protection and land consumption in an unconstitutional manner (...) The Federal Administrative Court also made faulty calculations with regard to the carbon dioxide emissions associated with the project. Put simply: according to a legally sworn expert, only such emissions should be taken into account that occur during take-off and landing (“LTO emissions”). The Senate of the BVwG, by contrast, also took into account emissions that occur during the entire flight (“cruise emissions”) in its forecast for 2025.”

Nighttime flight ban:

Action by the city of Mainz dismissed

The Aircraft Noise Protection Act is keeping its promise. Thus, in mid-July, the Hessen Higher Administrative Court (VGH) confirmed that the legally anchored thresholds sufficiently reflect the health-related consequences of aircraft noise. With this justification, the VGH rejected in-full a claim by the city of Mainz for further limitation of night-time air traffic.

The Court intensively addressed the latest flight noise research studies, notably the Frankfurt NORAH Study. This is considered the most comprehensive study on the topic worldwide. The judges argued that the NORAH Study did not offer any new indications of a threat to health long before the noise levels reached in the Aircraft Noise Protection Act. In early 2017, scientists at the Berlin Charité also found that “with the Aircraft Noise Protection Act of 2007, a set of regulations is in place that fully and adequately takes into account the noise protection concerns of the population, also in light of the findings of noise effect research obtained since 2007.”

Doha:

Lufthansa has to terminate route

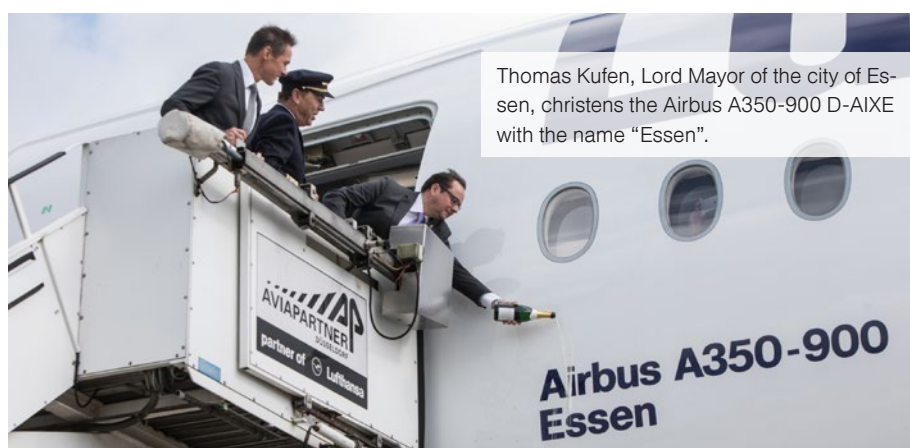
At the end of October, Lufthansa will terminate its daily connection between Frankfurt and Doha. The reason is that Qatar Airways is also systematically undermining sustainable air traffic in Germany between the two cities with dumping prices. In order to transport European passengers to Asia and Africa via the Doha hub, the state-owned airline has expanded its capacities between Frankfurt and Doha by an incredible 117 percent over the past ten years.

In this competition, which is aimed at displacing competitors, Lufthansa – as a private company – will now be forced to terminate the route. It is the fourth connection going to the Gulf that the German airline has had to terminate for this reason over the past three years.

Essen and Bonn:

Clear commitment to the location of North-Rhine Westphalia

In mid-September, a Lufthansa Airbus A350 was christened with the name of the largest Ruhr-area city of Essen. The “Flying Ambassador” currently flies to Mumbai, Boston, Delhi and Hong Kong. Another A350 was christened with the name “Bonn” on October 20. These examples underline that North-Rhine Westphalia plays a crucial role in the growth strategy of the Lufthansa Group. Accordingly, the number of employees is expected to increase from 5,000 to 6,500.





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