



WORLD ROUTE DEVELOPMENT STRATEGY SUMMIT

ICAO | WORLD BANK | UBM AVIATION

Sunday 2 - Monday 3 October 2011, Messe Berlin, Germany

Co-located with:



Uniting international aviation stakeholders to shape the future of global air transport

- Hear from over **50 leading speakers** in air transport, airports, route development, travel & tourism and air cargo
- Participate in controversial discussions and debates on how to overcome the most significant challenges currently facing the air transport community
- Tailor your agenda from a choice of sessions bringing together the previous conference elements of the **World Route Development Forum** into one single summit now open to all attendees

Unrivalled speaker line-up includes:



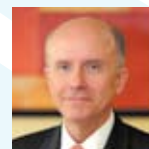
Jim Owens
VP Global Cargo
UPS Air Cargo



Julian Carr
Managing Director
bmbaby



Alex Cruz
CEO
Vueling Airlines



James Bennett
CEO
Abu Dhabi Airports Company



Edmond Rose
Commercial Director
Virgin Atlantic Airways



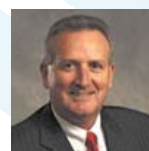
Josef Formosa Gauci
CEO
Malta Tourism Authority



Folasade Odutola
Director
Air Transport Bureau
ICAO



Ram Menen
Divisional Senior VP
Emirates Airline



Jeff Fegan
CEO
Dallas Fort Worth International Airport



Dr Charles Schlumberger
Lead Air Transport Specialist
The World Bank

Organised by:



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The **World Route Development Strategy Summit** will provide all aviation stakeholders with a complete understanding of the most significant challenges currently facing the air transport industry and showcase the latest innovations in key growth markets. This content and learning-packed two-day event will also provide unparalleled networking opportunities – all under one roof.

No other event features such a comprehensive agenda encompassing **air transport, global aviation strategy, route development, travel and tourism, and air cargo**. Featuring a morning of heavy-hitting keynote speakers and afternoon of streamed sessions, the structure of the programme makes it possible for delegates to create their own individual agenda by selecting just the specific areas of aviation relevant to their current role in the industry.

With the majority of the summit taking place the day before the one-to-one meetings begin at the World Route Development Forum, this will be the first year that all attendees will be able to attend the summit.



KEY HIGHLIGHTS

Choose from one of these three streamed sessions:

- A)** Understand how escalating airport competitor incentives and growing capacity constraints impact your organisation
- B)** Learn how to create stronger relationships between airlines, airports and tourism authorities
- C)** Maximise cargo as a revenue source for future growth of airlines and airports

ROUTE DEVELOPMENT

TRAVEL & TOURISM

AIR CARGO ROUTES

For delegates who aren't in one-to-one meetings, day two will provide an in-depth look at issues including oil prices, safety and security and how to overcome them.

No other event will feature over **50 high profile aviation leaders** including:

- | | |
|---|---|
| <p>ICAO, Folasade Odotola, Director, Air Transport Bureau</p> <p>Berlin Airports, Prof. Dr. Rainer Schwarz, CEO</p> <p>ACI World, Angela Gittens, Director General</p> <p>Ethihad Airways, Kevin Knight, Chief Strategy and Planning Officer</p> <p>Schiphol Group, Jos Nijhuis, President</p> <p>Abu Dhabi Airports Company, James Bennett, CEO</p> <p>oneworld, Michael Blunt, VP Corporate Affairs</p> <p>Royal Jordanian Airline, Hussain Dabbas, President and CEO</p> <p>ELFAA, John Hanlon, Secretary General</p> <p>Wizz Air, József Váradi, CEO</p> <p>Vueling Airlines, Alex Cruz, CEO</p> <p>ALTA, Alex de Gunten, Executive Director</p> <p>CAPA, Peter Harbison, Executive Chairman</p> <p>KLM, Pieter Groeneveld, VP Network Planning</p> <p>Malaysia Airlines, Germal Khera, General Manager International Affairs</p> <p>Southwest Airlines, John Kirby, Director International</p> <p>Dallas Fort Worth International Airport, Jeff Fegan, CEO</p> <p>Hermes Airports, Alfred van der Meer, CEO</p> <p>The World Bank, Dr. Charles Schlumberger, Lead Air Transport Specialist</p> <p>ICAO, Narjess Teyssier, Chief, Economic Analysis and Policy</p> <p>visitBerlin, Burkhard Kieker, CEO</p> <p>Delhi International Airport, Kiran Jain, Head of Airline Marketing and Routes Development</p> <p>Las Vegas Convention & Visitors Authority, Cathy Tull, Senior VP of Marketing</p> <p>Norwegian Air Shuttle, Daniel Skjeldam, Chief Commercial Officer</p> <p>Malta Tourism Authority, Josef Formosa Gauci, CEO</p> | <p>Seychelles Tourism Board, Alain St. Ange, CEO</p> <p>Spanish Tourist Board, Álvaro Blanco Volmer, Deputy Director General</p> <p>bmibaby, Julian Carr, Managing Director</p> <p>Metropolitan Washington Airports Authority, Mark Treadaway, VP of Air Service Planning & Development</p> <p>Emirates Airlines, Ram Menen, Divisional Senior VP</p> <p>Budapest Airport, Jost Lammers, CEO</p> <p>AirBridge Cargo, Tatyana Arslanova, Executive President ATI</p> <p>D.F. Hoppin & Associates, David Hoppin, Managing Director</p> <p>Liege Airport, Steven Vershasselt, Business Development Manager Asia Pacific</p> <p>UPS Air Cargo, Jim Owens, VP Global Cargo</p> <p>Budapest Airport, Christa Soltau, VP Cargo & Logistics</p> <p>Cologne Bonn Airport, Franz van Hessen, Director Cargo & Sales</p> <p>MasKargo, Shahari Sulaiman, Managing Director</p> <p>ICAO, Mohamed Elamiri, Deputy Director, Safety Management and Monitoring</p> <p>ICAO, Jim Marriot, Chief, Aviation Security</p> <p>Ethihad Airways, Vijay Poonosamy, Vice President- International & Public Affairs</p> <p>VernoEnergy, Evan Smith, Co-founder Partner</p> <p>Denver Airport, Patrick Heck, CFO</p> <p>Incheon International Airport Corporation, Mr. Young-Geun Lee, Executive Vice President</p> <p>Mumbai International Airport, Rajeev Jain, President</p> <p>Airbus, Christopher Buckley, Executive Vice President Sales- Europe, CIS and Latin America</p> <p>Virgin Atlantic Airways, Edmond Rose, Commercial Director</p> |
|---|---|

DAY ONE - SUNDAY 2 OCTOBER

MORNING

- 09:00 **Opening address**
UBM Aviation
The World Bank
 Folasade Odutola, Director, Air Transport Bureau, **ICAO**
- 09:15 **Host keynote address**
 Prof. Dr. Rainer Schwarz, CEO, **Berlin Airports**
- 09:30 **Keynote address**
- 09:45 **Positioning report**
 Aaron Heslehurst, News Anchor & Presenter,
BBC World Television
- 10:00 **Untangling international air politics**
Uncovering the most debated and underlying issues that countries face individually and as part of the international arena
 - Are the newly imposed taxes a significant global obstacle to air service growth?
 - What future implications does the EU ETS have on airports, airlines and international air travel?
 - How can we achieve more liberal multilateral air services to generate additional traffic?
 - EU safety list: devoid of aeropolitics?
Olivier Kankovec, Director General, **ACI Europe**
Athar Husain Khan, General Manager Policy, Infrastructure and Environment, **AEA**
Kevin Knight, Chief Strategy and Planning Officer, **Etiyah Airways**
Folasade Odutola, Director, Air Transport Bureau, **ICAO**
- 11:00 **Morning refreshments and networking**
- 11:30 **The evolution of the airline alliance**
Taking a look at how the major alliances are becoming more central to the future of global route development
 - What are their visions and plans for the future?
 - How will the airlines and airports benefit?
 - How will the alliances differentiate themselves from one another?
 - What is next in terms of airline mergers and acquisitions across the globe and how will this impact the airports?
James Bennett, CEO, **Abu Dhabi Airports Company**
Michael Blunt, VP Corporate Affairs, **oneworld**
Jos Nijhuis, President & CEO, **Schiphol Group**
Hussain Dabbas, President and CEO, **Royal Jordanian Airline**
- 12:15 **Spot the difference: Low Cost Carrier versus Legacy airline**
Investigating how the gap existing between low cost and legacy carriers is gradually narrowing and how this is impacting route development
 - What are the key growth markets in long and short haul?
 - Is the long haul low cost model working?
 - How will this new hybrid carrier impact routes traditionally served by legacy airlines?
 - How do the legacy airlines intend to connect with the Low Cost Carriers?
John Hanlon, Secretary General, **ELFAA**
Edmond Rose, Commercial Director, **Virgin Atlantic Airways**
Alex Cruz, CEO, **Vueling Airlines**
- 13:00 **Lunch**

AFTERNOON - choose to attend one of the

A) ROUTE DEVELOPMENT STREAM

- 14:00 **Discovering new markets for route expansion**
Investigating what the international plans are for the emerging and developing market leaders from Asia, Africa and the Americas
 - Detailing market analysis and forecasting future rates of growth
 - What are the challenges in increasing connectivity with Asia and the rest of the world?
 - Understanding the opportunities and challenges in Africa
 - What is driving competition in the Americas? How will the Major mergers influence new route development?
Alex de Gunten, Executive Director, **ALTA**
Peter Harbison, Executive Chairman, **CAPA**
Prashant Sukul, Joint Secretary, Ministry of Civil Aviation, **Government of India**
Scott Laurence, VP Network Planning, **JetBlue Airways**
Pieter Groeneveld, VP Network Planning, **KLM**
John Kirby, Director International, **Southwest Airlines**
- 15:00 **Afternoon refreshments and networking**
- 15:30 **Airport competition: Continuing to shrink the globe**
Understanding how to balance low airport pricing expectations by airlines, escalating competitor incentives and growing capacity constraints
 - Finding and creating routes that do not have capacity greater than demand already
 - Privatisation of airports- does this create a conflict of interest in terms of competition?
 - How can medium sized airports collaborate for transatlantic service?
 - Ensuring fair competition between regional airports and international hubs
Angela Gittens, Director General, **ACI World**
Andrew Harrison, Managing Director, **Manchester Airport**
Germal Khera, General Manager International Affairs, **Malaysia Airlines**
- 16:15 **Route financing and funding: Clearing the hurdles**
Understanding the balance between regulations versus negotiations
 - What challenges are compromising the ability of airports to finance route and capacity developments?
 - How can airports and their respective stakeholders combine their efforts to boost incentive packages?
 - What is the main source of frustration within these partnerships?
 - Measuring the economic impact of a new route and its financial implication
Jeff Fegan, CEO, **Dallas Fort Worth International Airport**
Alfred van der Meer, CEO, **Hermes Airports**
Narjess Teyssier, Chief, Economic Analysis and Policy, **ICAO**
Dr. Charles Schlumberger, Lead Air Transport Specialist, **The World Bank**
- 17:00 **End of day one**



following streams:

OR

B) TRAVEL & TOURISM STREAM

- 14:00 **Keynote address**
Gloria Guevara Manzo, Secretary of **Tourism Mexico**
- 14:15 **Airport, Airline and Tourism Authority: The golden triangle**
Creating a stronger relationship between the three key players in route development
- How can the relationship between the airport, airline and tourism authority be reinforced, and not just in the exotic markets?
 - Understanding the various levels of involvement of the tourism authorities in different countries and making the most of this affiliation
 - Expanding the relevant geographies for each carrier and alliance with the support of the tourism authorities
 - What is the role of tourism in route planning decisions and how will this develop in the future?
- Kiran Jain**, Head of Airline Marketing and Route Development, **Delhi International Airport**
Cathy Tull, Senior VP of Marketing, **Las Vegas Convention & Visitors Authority**
Daniel Skjeldam, Chief Commercial Officer, **Norwegian Air Shuttle**
Burkhard Kieker, CEO, **visitBerlin**
- 15:00 **Afternoon refreshments and networking**
- 15:30 **Government support in the tourism market and the transformation of the tourism authority**
Emphasising the importance of partnering aviation and tourism
- Are the tourism authorities evolving more into a destination management and marketing organisation whilst the governments take a back seat?
 - Are foreign carriers considered for access on the basis of economic and social contribution and not the impact on the national carriers?
 - What is the impact of flight taxes on tourism and business travel?
- Josef Formosa Gauci**, CEO, **Malta Tourism Authority**
Alain St. Ange, CEO, **Seychelles Tourism Board**
Álvaro Blanco Volmer, Deputy Director General, **Spanish Tourist Board**
- 16:15 **The next leap in social media**
Evaluating how social media is successfully integrating with more established marketing techniques
- Is this method of destination marketing working for the tourism authorities, airports and airlines?
 - Comparing and contrasting international success stories
 - How will social media change over the next 5 years?
 - Understanding how to effectively utilise social media for crisis management
- Julian Carr**, Managing Director, **bmibaby**
Katherine Droga, Regional General Manager Continental Europe, **Tourism Australia**
Mark Treadaway, Air Service Planning & Development, **Metropolitan Washington Airports Authority**
- 17:00 **End of day one**

OR

C) AIR CARGO ROUTES STREAM

- 14:00 **Keynote address**
Des Vertannes, Global Head of Cargo, **IATA**
- 14:15 **Making cargo a cornerstone of airlines' success**
Measuring the value of cargo
- What are airlines' key priorities in initiating or preserving routes?
 - Can air cargo be a tonic for passenger market challenges?
 - When should passenger airlines fly freighters?
 - Should cargo expansion be limited by passenger considerations?
- Ram Menen**, Divisional Senior VP, **Emirates Airlines**
Chris Mangos, Marketing Division Director, Miami-Dade Aviation department, **Miami International Airport**
- 15:00 **Gauging flexibility in route development**
Freighters and the viability of alternative gateways
- Integrated logistics: What is the impact on route development?
 - China: Opportunity, threat or both for cargo industry growth?
 - Suppliers: Productive targets for route development?
 - Airports: How and to whom should they market their facilities?
- Tatyana Arslanova**, Executive President ATI, **AirBridge Cargo**
David Hoppin, Managing Director, **D.F. Hoppin & Associates**
Steven Verhasselt, Business Development Manager Asia Pacific, **Liege Airport**
Jim Owens, VP Global Cargo, **UPS Air Cargo**
- 16:00 **Afternoon refreshments and networking**
- 16:15 **Leveraging cargo as a revenue source for airlines and airports**
Maximising this important revenue stream for future growth
- Can airlines and airports cooperate to improve reliability of long-term operations forecasts and facilities capacity plans?
 - What can airports provide airlines for route analyses and how can they support new routes?
 - How can airports and airlines benefit from area economic development stimulated by cargo operations?
 - Can airports partner to support route development?
- Christa Soltau**, VP Cargo & Logistics, **Budapest Airport**
Franz van Hessen, Managing Director Cargo, **Cologne Bonn Airport**
Shahari Sulaiman, Managing Director, **MasKargo**
- 17:00 **End of day one**

In association with



DAY TWO - MONDAY 3 OCTOBER

- 09:30 **Opening address: Setting the scene**
- 10:00 **Security and safety: The next challenges**
What are the biggest threats in air transport?
- Aviation security challenges: a progress report
 - What does the future hold for airport security and overcoming the next security challenges?
 - How much of an obstacle are security and safety in developing markets?
 - With expected traffic growth, what more can be done to reduce accident rates?
- Mohamed Elamiri, Deputy Director, Safety Management and Monitoring, **ICAO**
 Jim Marriot, Chief, Aviation Security, **ICAO**
 Dr. Charles Schlumberger, Lead Air Transport Specialist, **The World Bank**
 Ralph Beisel, CEO, **German Airports Association**
- 11:00 **Morning refreshments and networking**
- 11:30 **Predicting the impact of fuel price volatility**
Bouncing back from the political crisis and natural disasters faced this year
- What role can the government play on reducing sale tax on ATF?
 - What will be the threshold where airlines can no longer absorb fuel costs and pass on the burden to the consumer? Is it already happening?
 - Do airports fully understand the impact that fuel price instability has on the airlines and its influence on route expansion?
- Lew Fulton, Senior Transport Energy Specialist, **International Energy Agency**
 Alan Robinson, President & CEO, **Paradigm BioAviation**
 Professor Kjell Aleklett, Professor of Physics, **Uppsala University**
- 12:30 **Greener skies; greener profits- an oxymoron?**
Evaluating if the aviation sector is paying to become greener without see any return
- Reviewing the future forecasts for aviation emissions and monitoring the financial impact of compliance
 - Emission allowances: what are the coping strategies and who will benefit?
 - What initiatives are given to green airports and how is reduced airport energy costs viewed by the public?
- Vijay Poonoosamy, VP International & Public Affairs, **Etihad Airways**
 Evan Smith, Co-founder Partner, **VernoEnergy**
- 13:30 **Lunch**
- 14:30 **The power of airport developments on local and country economies**
Understanding how airports are now viewed as being economical catalysts
- Examining the justification for public investments in new airport construction and development
 - Evaluating the impact in terms of airport facility employment, directly related business activity and spin off development
 - Enhancing the global connectivity of an airport and it's impact on the economy
 - Using airports as a tool to reinvigorate regional economies
- Jost Lammers, CEO, **Budapest Airport**
 Patrick Heck, CFO, **Denver Airport**
 Mr. Young-Geun Lee, Executive Vice President, **Incheon International Airport Corporation**
 Rajeev Jain, President, **Mumbai International Airport**
- 15:30 **Delayed aircraft deliveries this year and beyond**
Measuring the present and future implications of delayed aircraft deliveries
- Are the deliveries back on track?
 - Detailing the cost advantages of the new generation aircraft models and their impact on airline profitability
 - Are the advancements in aircraft technology keeping pace with the challenges of energy prices and environmental policies?
 - What is the future outlook and impact on air transport?
- Christopher Buckley, Executive Vice President Sales – Europe, CIS and Latin America, **Airbus**
 Philippe Poutissou, Vice President – Marketing, **Bombardier Commercial Aircraft**
- 16:30 **Closing remarks from the moderator**
- 16:45 **End of summit**

5 REASONS TO ATTEND THE WORLD ROUTE DEVELOPMENT STRATEGY SUMMIT

- 1 Hear from associations including **IATA**, **ACI World**, **ELFAA**, **AEA** and **ALTA** about the shape of the market and their future strategies
- 2 Have your say in formulating the future strategies in route development, tourism and air cargo
- 3 Listen to **ICAO** provide global perspectives on air transport, safety, security and environmental protection issues, upon which sustainability of the aviation sector depends
- 4 Participate in discussions with **airport CEOs** on how they are overcoming pressures to reduce airport costs and deliver capacity growth
- 5 Get up to speed with need-to-know topics including increasing oil prices, aviation's impact on the environment, government support in the tourism market and more.....

Register before 29 July 2011 to save up to £100, visit www.worldroutedevelopmentsummit.com

SPONSORSHIP OPPORTUNITIES

If influencing CEOs, COOs, CFOs and Network Planners is a big part of your business development strategy, **The World Route Development Strategy Summit** is a strong platform for you to promote your brand and services.

Whether you are looking to advocate your airport or your destination, this is a unique chance to capture the attention of 300 of the most senior industry participants and VIPs – all who will be present in the same place, at the same time.

Sponsorship opportunities are limited. To discuss these in more detail, contact **Patricia Holst** at patricia.holst@ubm.com or on **+44 (0)207 955 3766**.

BOOKING RATES - CONFERENCE ONLY RATE

Please note this is only for delegates who haven't/won't register to attend The World Route Development Forum

EARLY BIRD DISCOUNT - BOOK & PAY UP TO & INCLUDING 29 JULY 2011

Airports, Tourism Suppliers, Commercial Suppliers & Consultants - Please register delegates(s) @£849 + TAX @ 19% = £1010.31

Airlines - Please register delegates(s) @£299 + TAX @ 19% = £355.81

STANDARD PRICE - BOOK & PAY AFTER 29 JULY 2011

Airports, Tourism Suppliers, Commercial Suppliers & Consultants - Please register delegates(s) @£949 + TAX @ 19% = £1129.31

Airlines - Please register delegates(s) @£349 + TAX @ 19% = £415.31

UPGRADE RATE FOR WORLD ROUTES ATTENDEES

Please note this is only for those already registered for The World Route Development Forum and you should have been allocated a promotional code to upgrade. Please enter the promotional code on the final registration page. If you do not have a promotional code, please email annelise.quinton@ubm.com

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Airlines - Please register delegates(s) @£249 + TAX @ 19% = £296.31

Please note if you are not currently attending The World Route Development Forum but would like to register for both The World Route Development Forum and The World Route Development Strategy Summit, visit www.routesonline.com and follow the links to The World Route Development Forum to register.

WAYS TO REGISTER

Telephone: +44 (0)20 7921 8039

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CUSTOMER CODE

ICAO

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- You apply for a ticket to the Conference by completing this Order Form. The Organiser may at its absolute discretion accept or refuse your application. A binding contract will be formed only when the Organiser provides you with its written acceptance of your application.
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- The Organiser reserves the right, due to unforeseen circumstances, to alter the: content; location; timetable; speakers; venue; and/or other

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- You may transfer your ticket to another individual within the same company or group of companies PROVIDED that the recipient of the ticket would have been eligible to purchase the ticket at the price that you paid for it.
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 - If you fail to provide us with written notice which is acknowledged by the Organiser in accordance with section 6, you will be required to pay the full cost of your ticket. If you have already paid for your ticket, no refund will be given.

- The Organiser's liability for any losses you may suffer as a result of us breaching these terms and conditions or for any breach of any statutory duty or negligence or otherwise is strictly limited to the total purchase price of the Conference ticket or (if liability occurs in respect of more than one ticket) those relevant Conference tickets.
- To the maximum extent permitted by law, neither the Organiser nor any of its directors, employees or other representatives will be liable for any of the following losses or damage (howsoever arising and whether such losses were foreseeable or not): loss of profit; loss of revenue; loss of business or opportunity; loss of reputation or goodwill; and/or any indirect, consequential or special loss; whether arising in connection with the Conference or the provision of our services to you.
- Nothing in these terms and conditions shall exclude the Organiser's liability for (i) death or personal injury as a result of its negligence; (ii) fraud or fraudulent misrepresentation; or (iii) any liability that cannot be limited or excluded by law.

- These terms and conditions and any dispute or claim arising out of or in connection with them or their subject matter, shall be subject to English law and the exclusive jurisdiction of the English courts.
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