The Milan airport system and the global network

Hub suitability and relations with the "locus" of the Milan airports

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Among the gates the Milan area is endowed with, airports play a crucial role for the connectivity of territory, enabling long range connections – especially for passengers – to the main nodes of the global network. The Milan system is composed by a city airport (Linate), a low cost almost dedicated terminal (Bergamo - Orio al Serio), and an intercontinental hub (Malpensa).

On one hand, it is worth to analyse the capabilities of its elements in playing as an effective gate in the global network, in terms of both infrastructural endowment and supplied connections. On the other hand, in order to understand the key factors affecting the development of the system of airports – and, consequently, of the territory – it is worth to analyse the relations between its main actors (airports and airlines), and the main strengths expressed by the territory itself.

Concerning the hub suitability of the Milan system, the comparison between Malpensa and the main European hubs shows a level of effectiveness of the hub functionalities adequate to perform as a hub, but which is lower than the one of its foreign competitors, especially in terms of operational issues. In terms of connectivity, a synthetic measure of the intercontinental accessibility of airports based on the number of destinations and the frequency of connections shows that Malpensa is far lower than the main European nodes, being London Heathrow the most "accessible" one, and lower also than closer competitors such as Munich.

As concerns the governance of the main actors of the air transport network, on the airports side Malpensa shows – like Amsterdam – an almost complete public control of the assets, while other hubs report more significant presence of private (and in some cases foreign) investors among their shareholders. In terms of "locus", all the airports considered – with the exception of London Heathrow – are tightly linked to the territory (share of the public or private "locus" from 54% to 100%). Considering the main airlines serving the Milan area through the three airports composing the system– those whose strategies can strongly and directly affect the development of the Milan system – the first five companies in terms of number of flights are Alitalia (46%), AirOne (7%), Lufthansa and Ryanair (5%), Meridiana (3%). None of them has strong connections with the Milan “locus”, the last three being foreign owned, and the Italian ones rather an expression of the Rome “locus”.

In synthesis, Malpensa seems to have the characteristics of a second-level intercontinental hub in terms of activity and connection, and the managing company (SEA) is an expression f the “locus”. The companies operating the grater part of the flight of the Milan airport system do not have any connection with the territory in terms of governance, and this may affect the future development strategies.