



# A note on the network performance of Dubai and Emirates

Dr Guillaume Burghouwt  
g.burghouwt@airneth.nl



# Outline

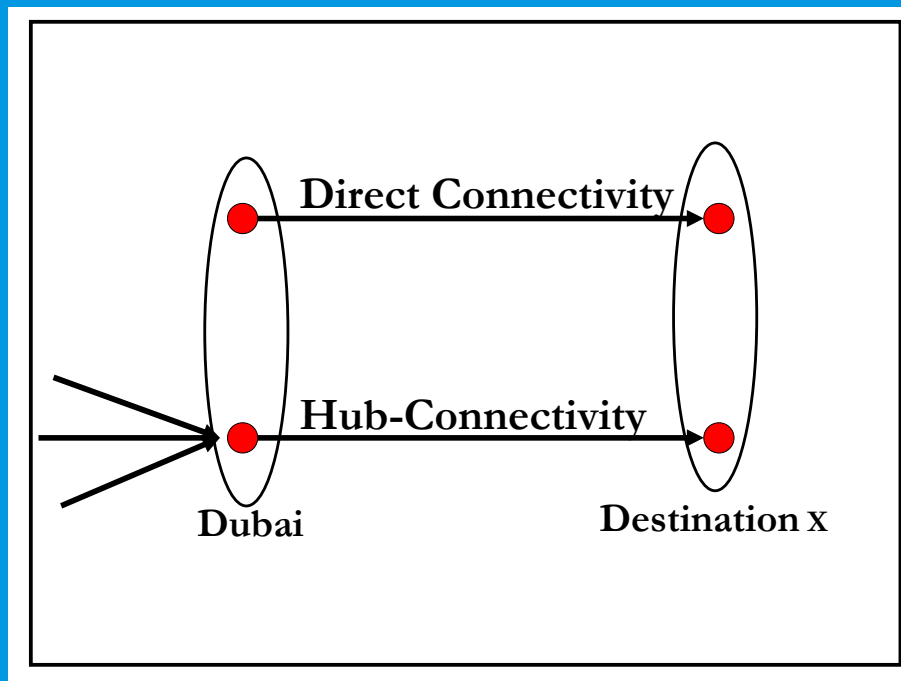
- **NetScan: measuring the competitive position of airline networks**
- **Direct network of Dubai**
- **Dubai as a hub and the role of Emirates**
- **Hub competition**



# What is NetScan?

- Measures and quantifies the performance of air transport networks, using OAG flight schedules
- Direct connections and indirect connections (via hub)
- Takes into account number of travel options, elapsed time and connecting time via the hub
- Results in a single indicator: Connectivity Unit (CNU)

# Connectivity



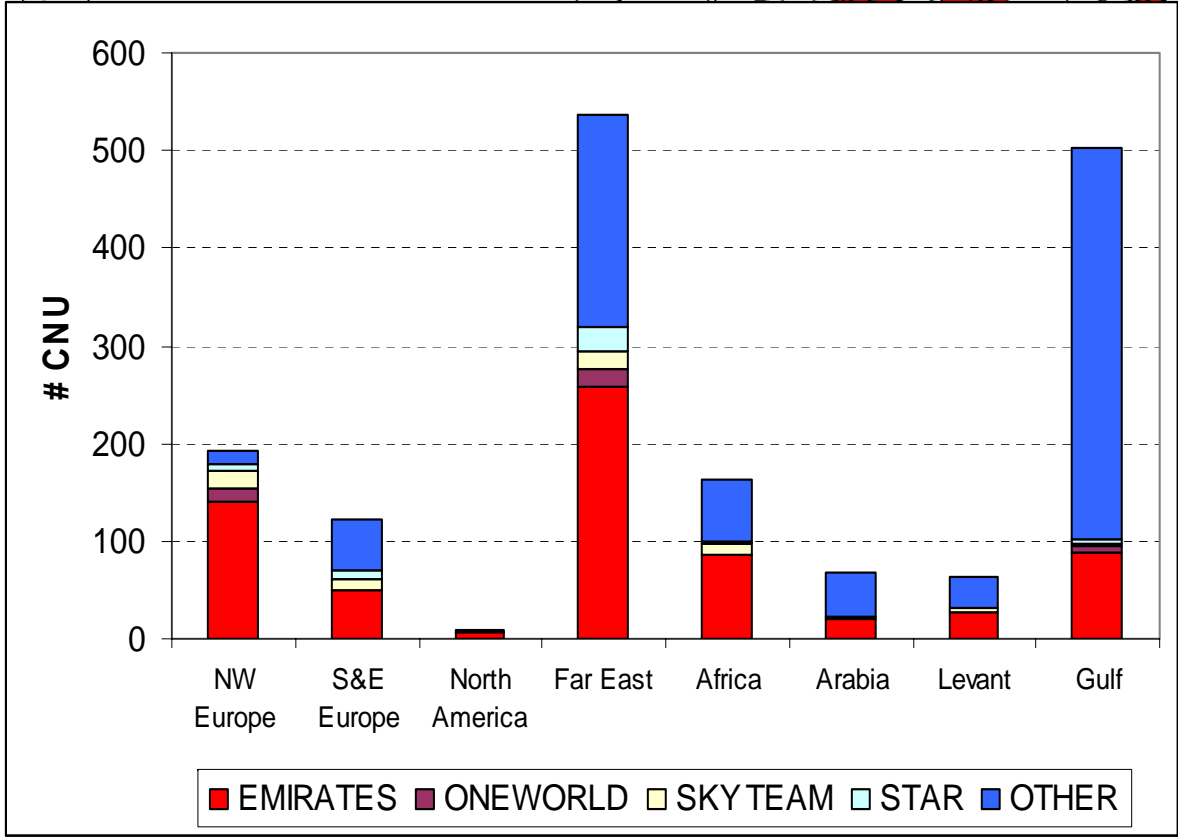
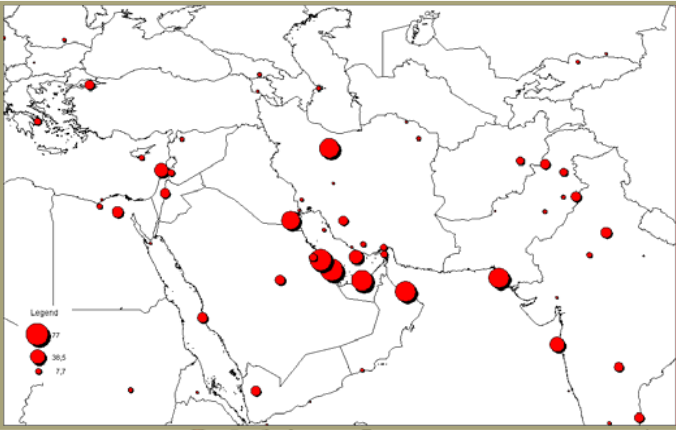
origin	hub	destination	alliance	average quality index	frequency per week	CNU/week
Amsterdam	--	Cincinnati	SkyTeam	1,00	7	7,0
Amsterdam	Atlanta	Cincinnati	SkyTeam	0,42	14	5,9
	Boston		SkyTeam	0,49	7	3,4
	Paris CDG		SkyTeam	0,35	47	16,6
	Detroit		SkyTeam	0,32	89	28,7
	New York Newark		SkyTeam	0,40	46	18,2
	Rome FCO		SkyTeam	0,38	7	2,6
	Frankfurt		SkyTeam	0,47	7	3,3
	Washington Dulles		SkyTeam	0,46	14	6,4
	Houston		SkyTeam	0,35	7	2,4
	New York JFK		SkyTeam	0,37	28	10,5
	Memphis		SkyTeam	0,19	7	1,4
	Minneapolis		SkyTeam	0,30	41	12,1
	Chicago O'Hare		SkyTeam	0,39	14	5,4
			Star	0,31	7	2,2
	Philadelphia		Star	0,30	6	1,8
	Montreal Dorval		SkyTeam	0,58	7	4,1
	Toronto		SkyTeam	0,41	6	2,5
TOTAL				0,37	361,00	134,50



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# # direct cnx from DXB to rest of the world, September 2005





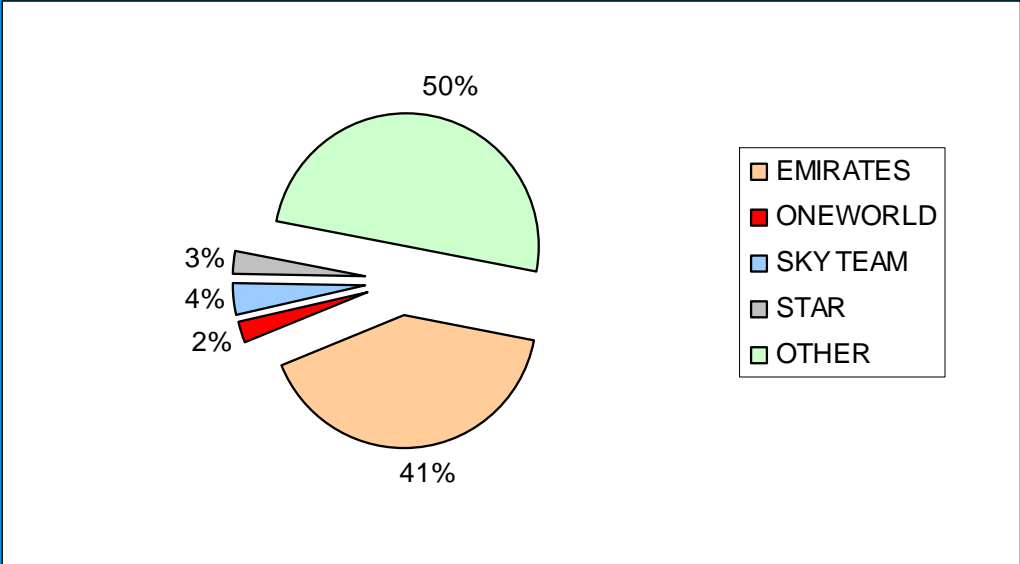
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# The role of Emirates at DXB



Share (%) airlines/alliances  
in total direct CNU from DXB

# Emirates' hub at Dubai: connectivity per week

# airpt. pairs *via* DXB

1.683

Frequencies *via* DXB

10.345

Avg. Quality index

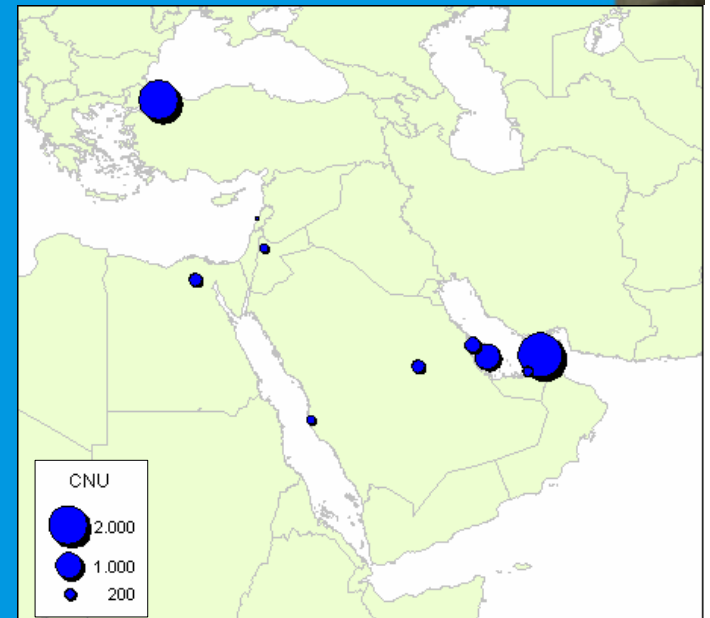
0,33

# CNU's *via* DXB

3.405

% Emirates in CNU's

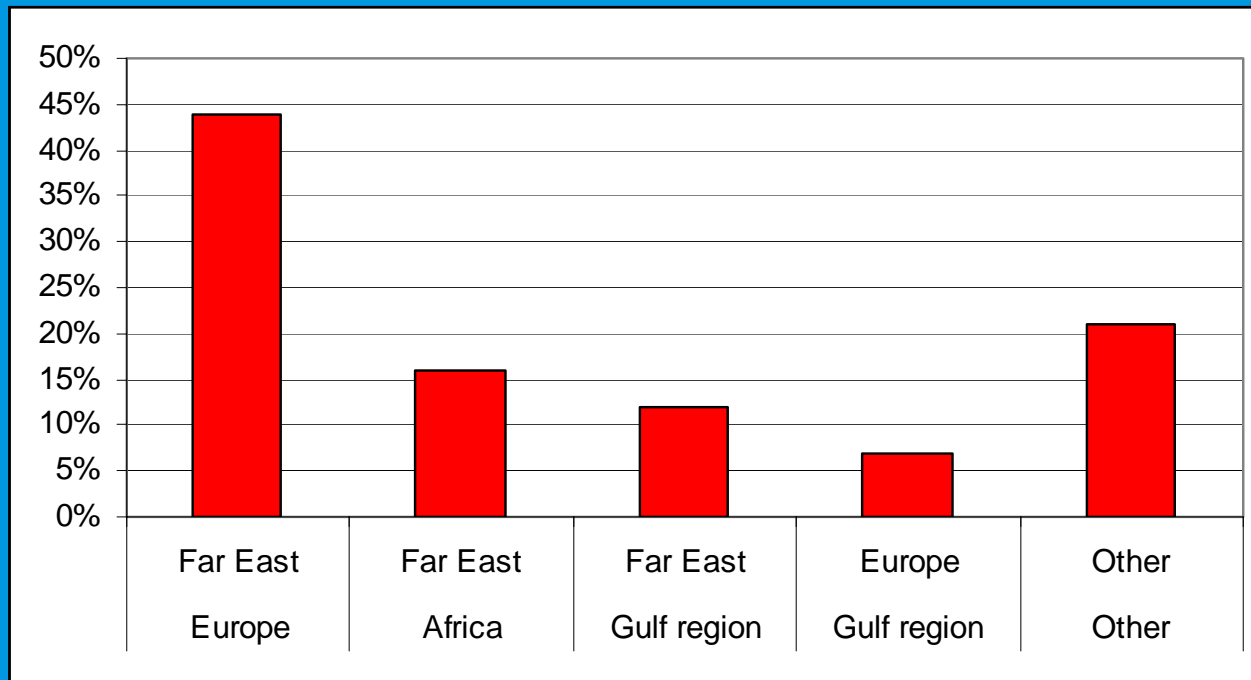
99,6%



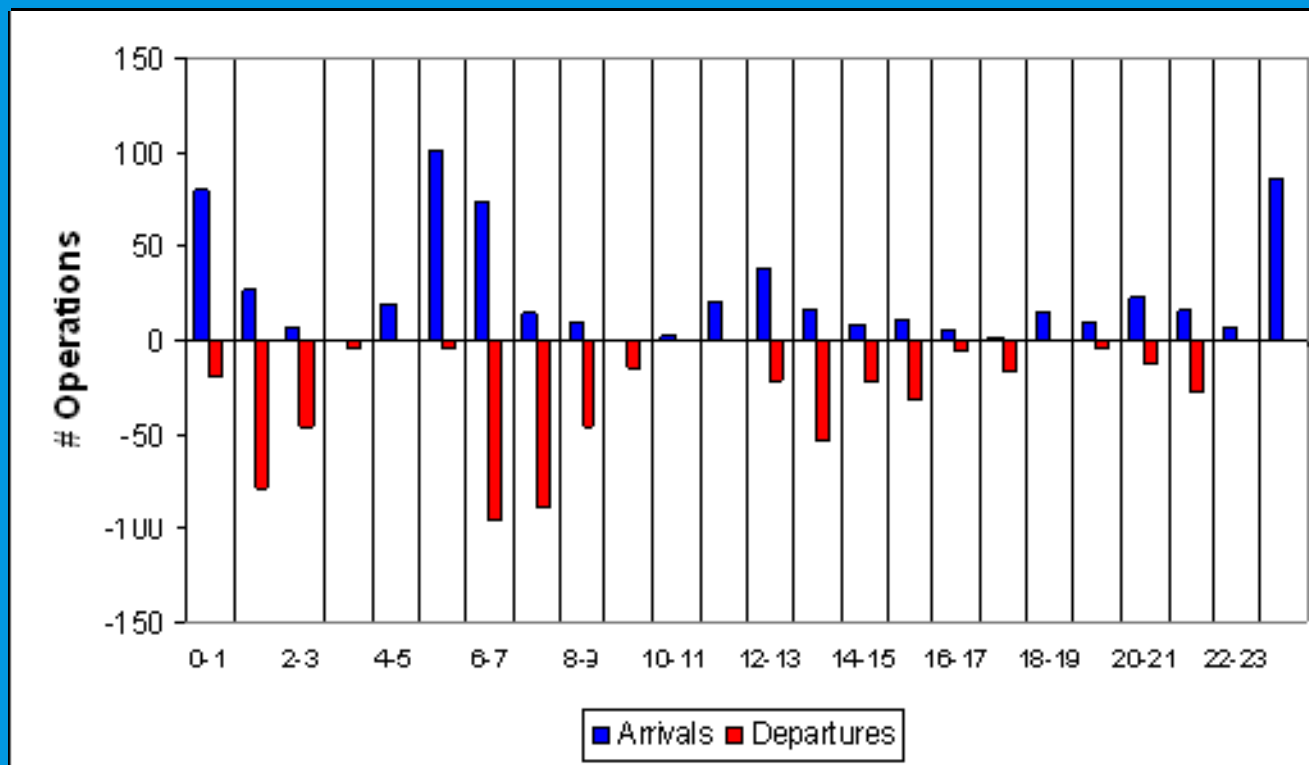
Size of selected  
hubs in # CNU

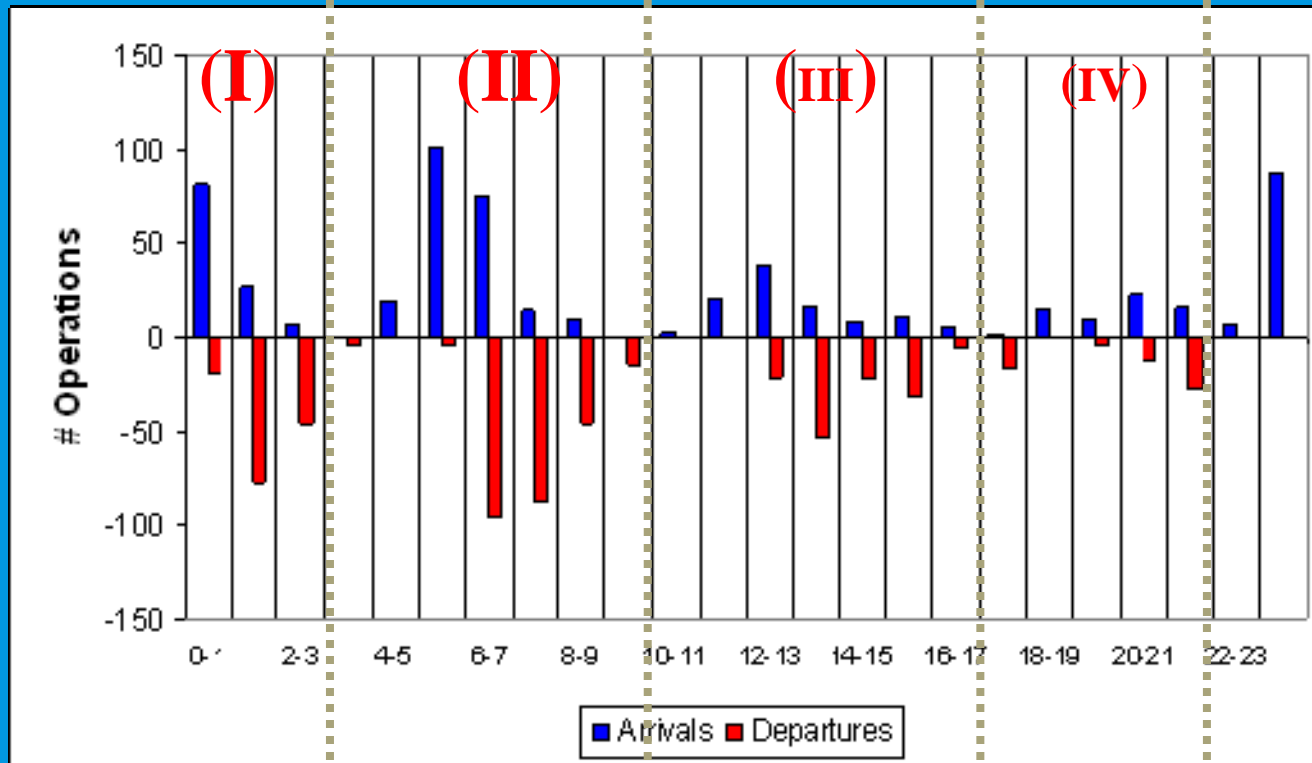


# # CNU by connecting market via Dubai



# EK at DXB: a “night-hour” hub





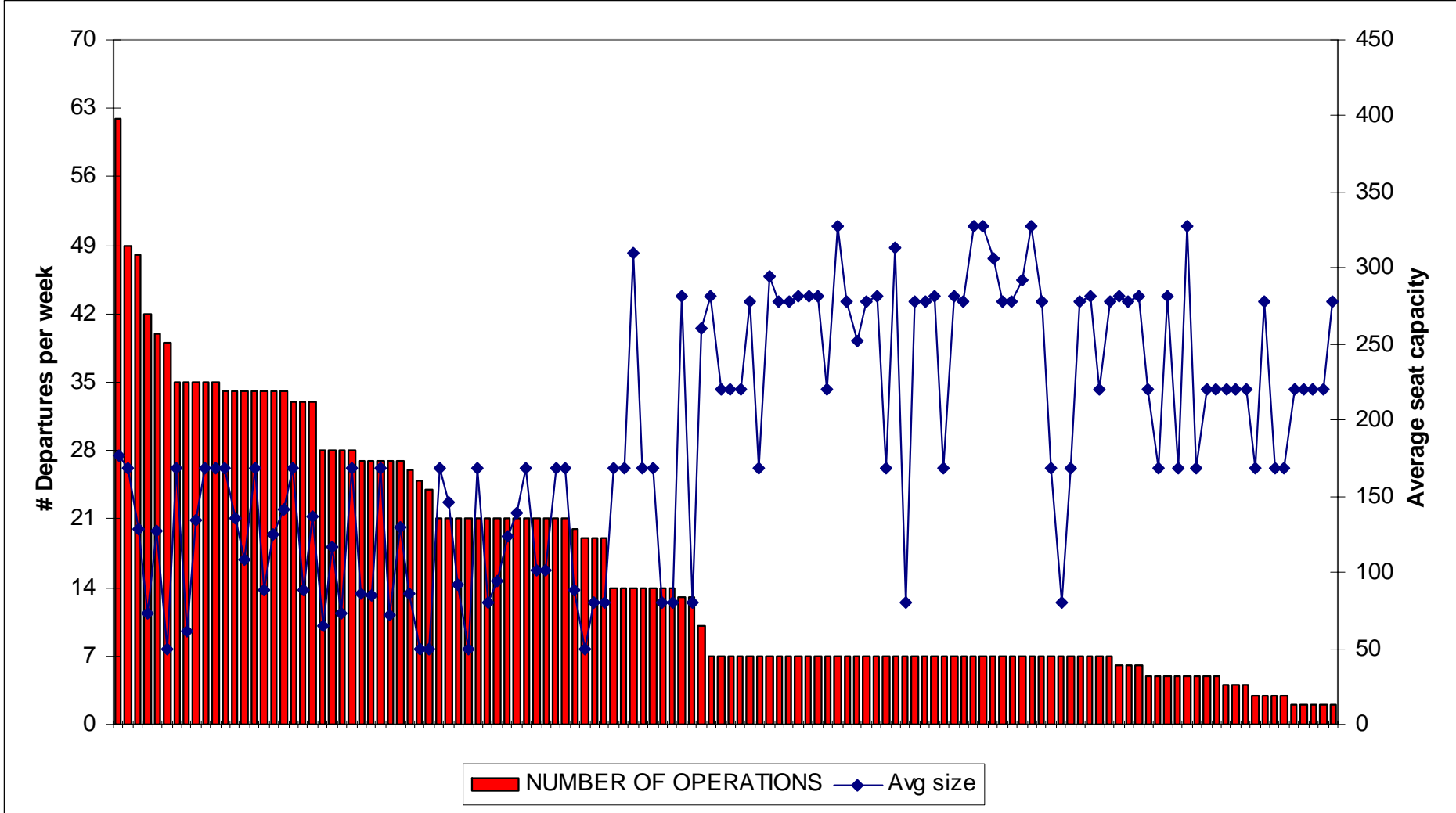
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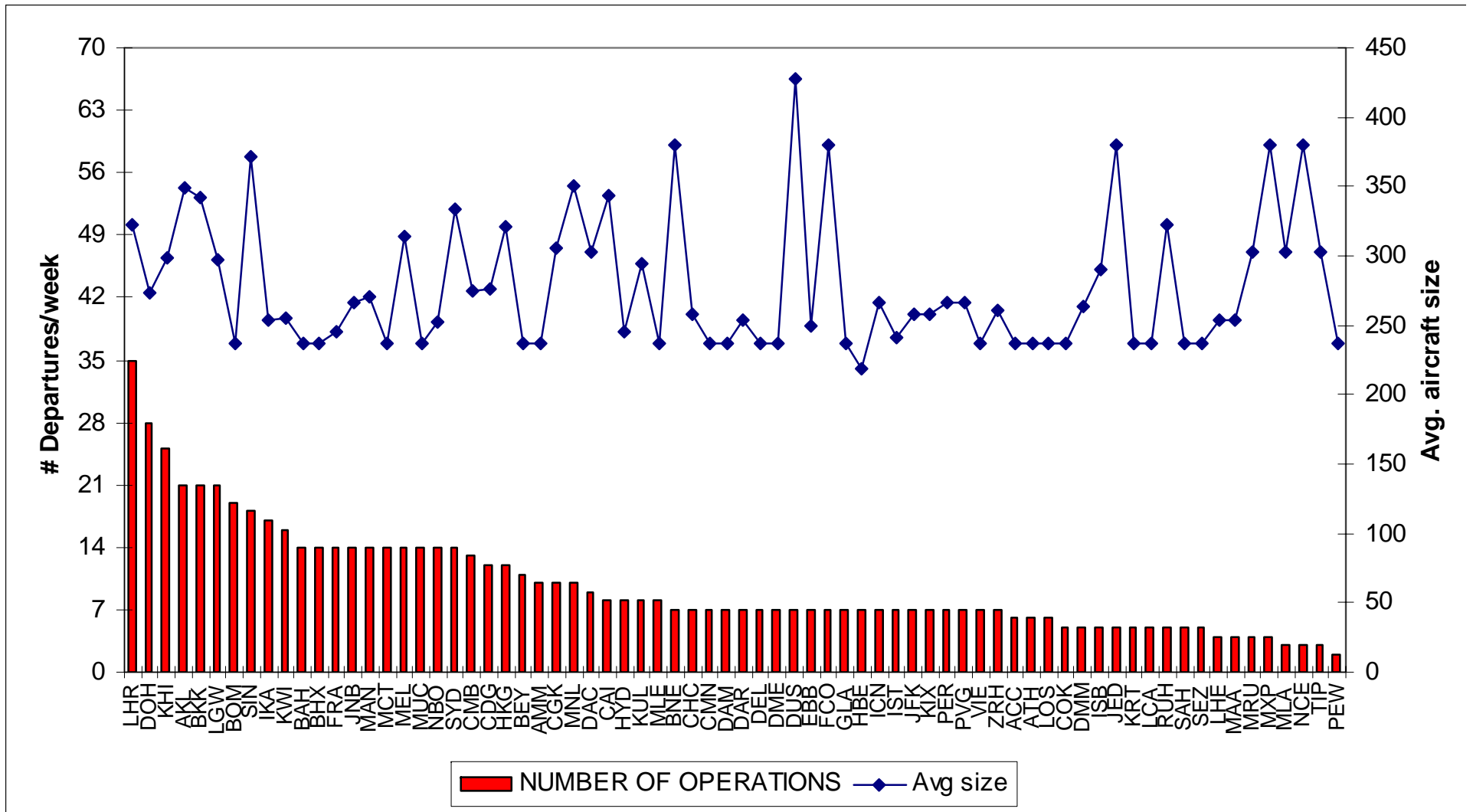
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Europa	Verre Oost.

# KLM at AMS: short-haul frequency versus long-haul capacity



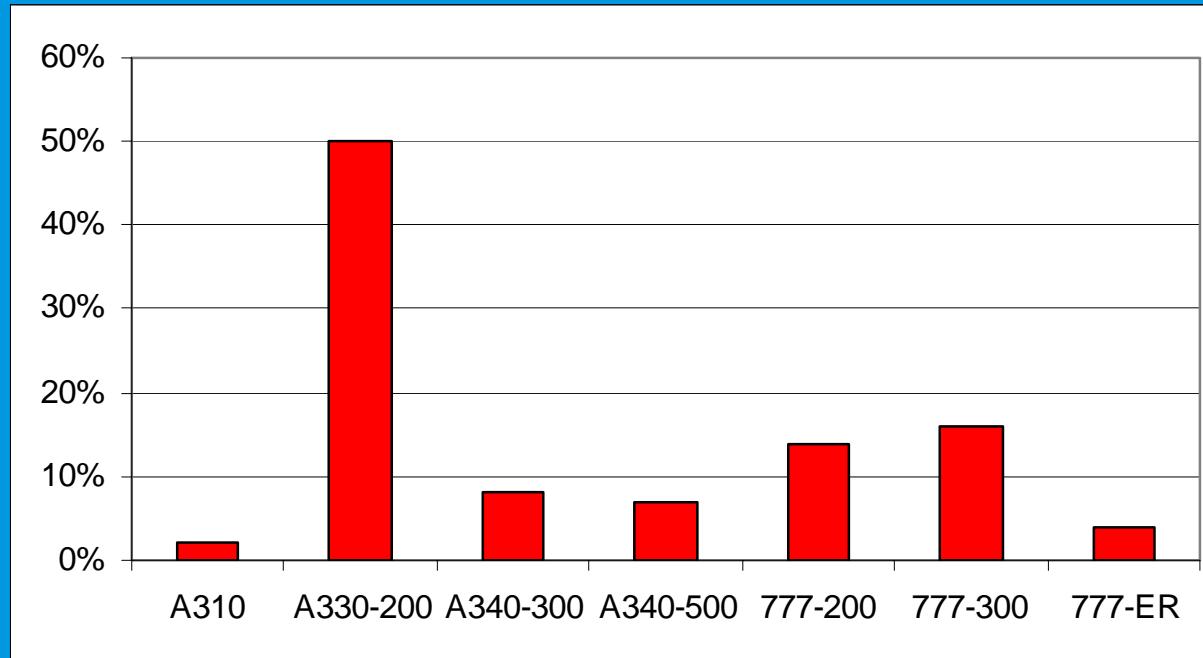
# Emirates at DXB: focus on capacity, even on short-haul







# Fleet distribution Emirates

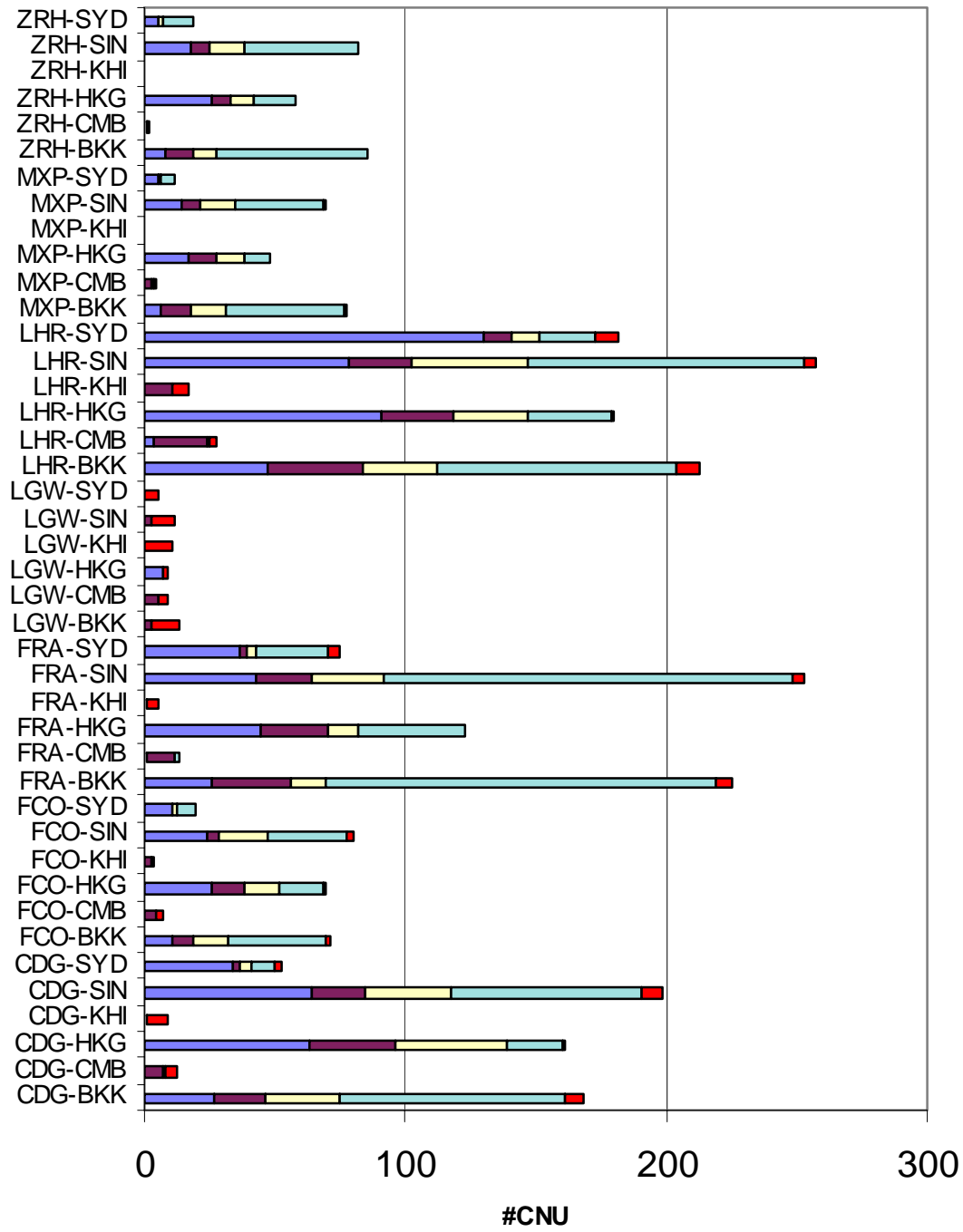




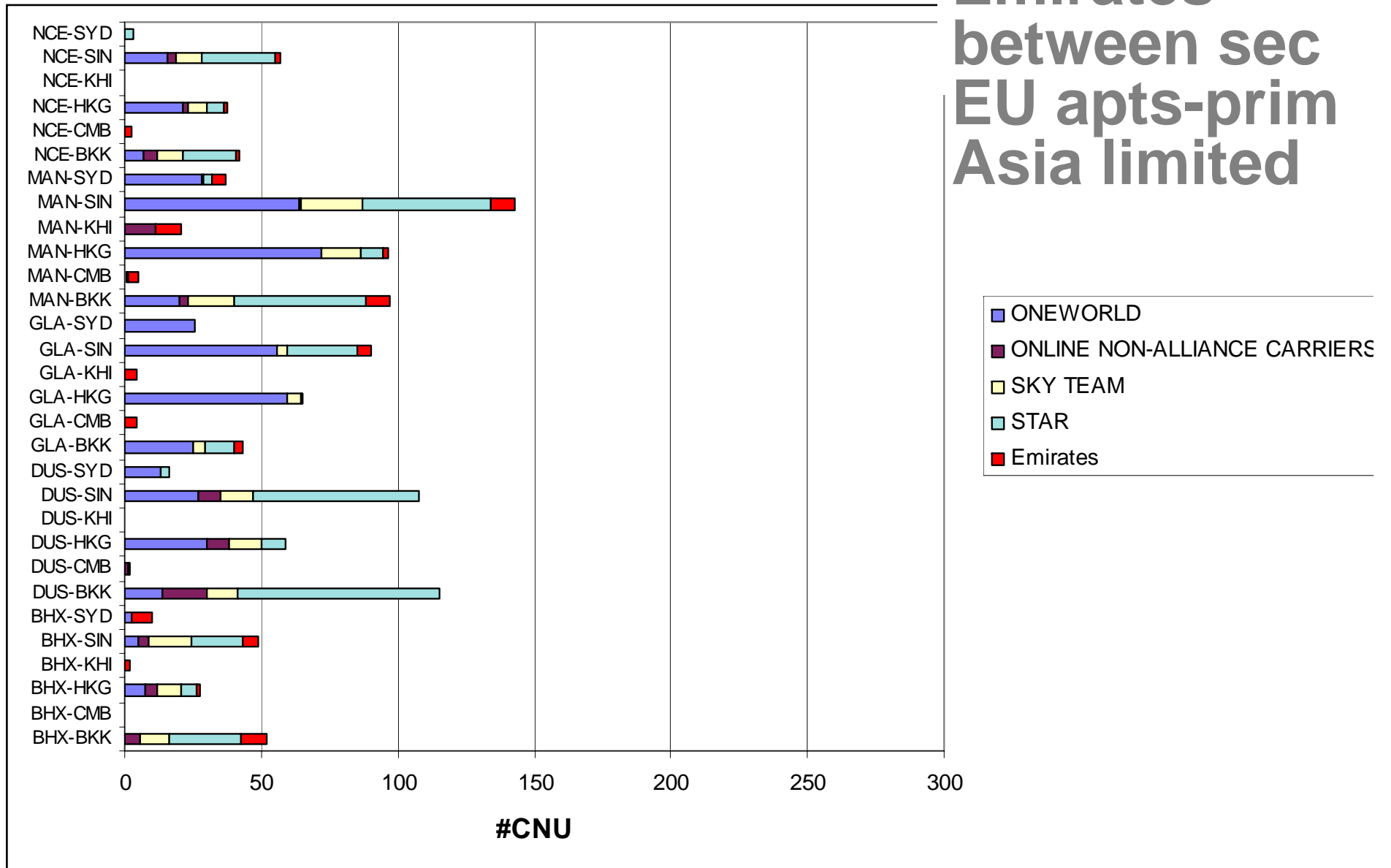
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# Competitive position of Emirates between prim EU hubs-prim Asia limited



# Competitive position of Emirates between sec EU apts-prim Asia limited





# Conclusions and remarks

- Hub operation is still underdeveloped in terms of number of waves, frequencies and destinations served
- Position in connecting markets still limited
- Well-placed with respect to success factors hubs:
  - Airport capacity and plans
  - Excellent geographical location of hub
  - Strong hub-carrier
  - Corporate style of governance/ functional synergies
- But:
  - Not part of global airline alliance
  - Small catchment area