

POLICY BRIEF

For decision makers in politics, media and business

1/18



From 5 German-cities to altogether 21 US metropolises = since early November also again from Berlin.

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Strong social partnership

ESSENTIAL FOR LASTING CORPORATE SUCCESS

The German labour market is robust. Never before have so many people in this country had a job, with some districts recording unemployment rates of less than two percent under full employment – not least for regions close to the airport. As such, there is a stronger focus on the quality of jobs for workers and graduates. The Lufthansa Group is well positioned when it comes to this.



“I am pleased that there are people in the Group and in different areas who are determined to develop and drive forward innovative and future-oriented business models, such as Lufthansa Aerial Services.”

DR. BENJAMIN LÖHR
Head of Lufthansa Aerial Services



“Lufthansa Cargo is still a good German company with strong collective agreements and social benefits. We will stand our ground, no matter how many gulf carriers enter the picture.”

GUNNAR STRAUSS
Customer Account Manager,
Lufthansa Cargo

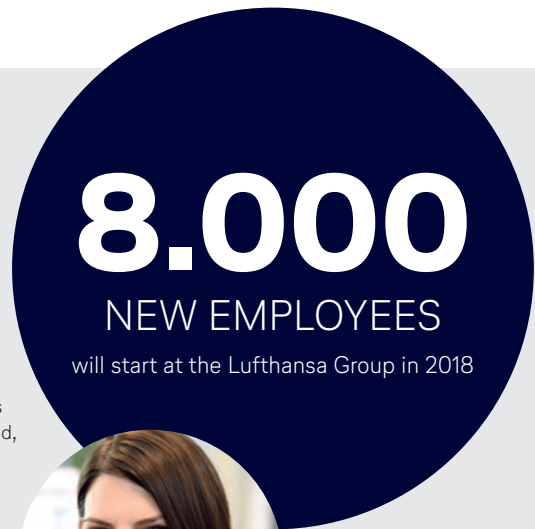
“My job gives me the unique opportunity to act in an entre-preneurial manner and to develop digital prototypes, whilst at the same time having a large group with a strong brand behind me.”

SOLVEIG SCHULZE
Senior Venture Development Manager,
Lufthansa Innovation Hub



“At the beginning, Lufthansa InTouch for me was a great way to get to work abroad. 16 years later, I have been stationed in Dublin, Brno, Melbourne, Cape Town and now Berlin.”

MICHAELA KAIM-SCHOBY
Site Manager, Lufthansa InTouch Customer Service



The Group has always been committed to the social market economy. In concrete terms, this means that the global group has found the right balance between the interests of its around 140,000 employees worldwide and the requirements of the business. However, this is by no means trivial – the Lufthansa Group always has to be ready to answer questions about how they want to position themselves for the future. They have to customise and abandon strategies, break up structures and completely open up new fields of business. On the one hand, this dynamism is satisfying – who doesn't want to work in an innovative and successful group? On the other hand, it is also demanding for all employees.

Deep appreciation for employee representatives

This makes workers' councils even more important. In Germany alone, 943 works councils represent the interests of employees at the Lufthansa Group and play a part in the Group's strategic orientation. In addition, the company relies on the collective bargaining partnership in order to achieve a fair balance of interests. And so it was that in December 80 percent of the members of the German pilots' trade union (Vereinigung Cockpit, VC) voted for the newly negotiated collective agreements. Also in December, Eurowings agreed collective agreements for growth with ver.di and the VC. Other airlines – first and foremost Ryanair – extensively refuse to bargain with the trade unions in this country to a large extent.

Unimagined diversity

Lufthansa is successfully embracing the social partnership. Passenger numbers are increasing and the company can invest strongly in innovation. Aspects of a successful company:

- **Training:** Aircraft mechanics and toolmakers, air transport and insurance brokers, cooks, franchise restaurant proprietors, computer scientists, food technologists, logistics experts, salespeople ... The Lufthansa Group is currently training more than 1,000 young people in 30 different occupations. So that all trainees from Air Berlin Technik can successfully complete their training, Lufthansa Technik and the trade union ver.di entered into a corresponding agreement in mid-December.
- **Digitalisation:** An important reason for Lufthansa's high level of attractiveness is that there is space for creativity and innovation here, despite its structure as a large global company. According to a study by the business magazine Capital, Lufthansa is a pioneer in digitisation and has the best innovation lab in Germany. In a large-scale study on the subject of service apps carried out by Focus Money, Lufthansa took first place across all industries, and its subsidiary Eurowings took spot number three.
- **Talent Management:** "Every employee has talent" – the Lufthansa Group develops its employees according to this guiding principle. To do this, the company regularly recalibrates its instruments. "Spotlight on talent" focuses on internal

talent across all business fields. Via the "TalentHub", the Group stays in contact with external talent more easily – for example with former interns who distinguished themselves through very good performance. As the third new format, the "Alumni Network" reaches out to former employees.

Women to the front

Nevertheless, there's still room for improvement. This applies in particular to the proportion of women in leadership positions. By 2021, Lufthansa wants to nearly double the share to 18 percent at top management level. At the level below that, the goal is a ratio of 24 percent. In concrete terms, this means that there needs to be another 41 female employees employed at this level in addition to the 110 female employees already there. These are ambitious goals that the company wants to achieve with new measures such as the "Ladies Think Tank".

Shaping Europe's air transport market together

The Lufthansa Group has done its homework in the past few years. Collective agreements and products have been modernised, while unit costs and debt have been reduced. Thanks to this team performance by Lufthansa employees, the company can play an active role in shaping the important European consolidation of the airline market and offer professional opportunities to 8,000 new employees in the coming year. Together with the employee representatives, the Lufthansa Group will continue to make groundbreaking decisions in order to survive in the global competition and to offer good and secure jobs.



"I am proud to have been part of this global group for over 20 years. That speaks for itself. But I also wonder what changes growth will bring."

SILKE SCHMUCK
Head of Sales, LSG Sky Food



"What do I still love about working at N3? My work is very diversified. As a team, we bear the responsibility for delivering good quality every day to ensure safe flight operations for our customers."

CHRISTIAN SCHMIDT
NDT Cleaning Operator,
N3 Engine Overhaul Services



"In the last three years I have seen half of Europe. We fly from Berlin to dozens of destinations. The best thing though: I love going to work every day, because the team is great and our tasks and passengers are diverse."

NICOLE MOSINIAK
Eurowings Flight Attendant



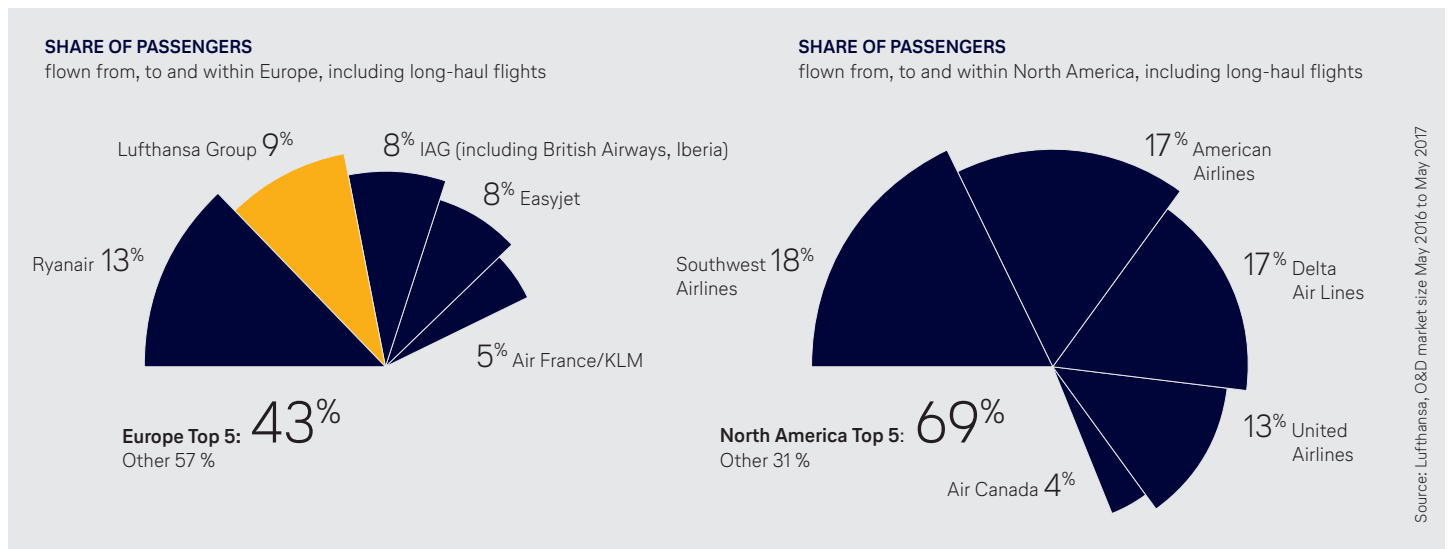
"It's great to see the sun above the clouds and the earth from a bird's-eye view. And to do that whilst still being able to contribute to establishing Eurowings as Europe's third largest low-cost airline, you really do get a kick out of it."

ANDREAS CLAUDIUS
Head of flight operations and A330 Captain of Sun Express
Germany, a joint venture by the Lufthansa Group

Worldwide consolidation

THE COURSE IS ALSO SET FOR EUROPE

The state-owned Gulf airline Etihad has, over many years and in purely mathematical terms, subsidised every ticket sold by Air Berlin by an average of 25 euros. In the end, however, we saw the insolvency of Germany's second largest airline. This shows that extreme price competition and artificially generated overcapacity can only temporarily conceal business-related problems, but cannot solve them. In the end, it was the employees and customers who footed the bill in terms of lost jobs and forfeited tickets.



Source: Lufthansa, O&D market size May 2016 to May 2017

Lufthansa Group helps shape consolidation

Given the 160 airlines who in Germany alone are fighting for passengers, a further consolidation is being mapped out. Thanks to a radical modernisation of the fleet, the products and the collective agreements over the past few years, Lufthansa Group is now in a position to play an active role in shaping this consolidation. The best example of this: Lufthansa Group is currently integrating the former Air Berlin subsidiary airline Walther (LGW). All employees of LGW are coming to Eurowings with their existing employment contracts. With additional recruitment, the number of employees in LGW flight operations in 2018 will grow to 870. A total of over 60 of the 140 aircraft used by Air Berlin will then be at the service of the Lufthansa Group. Many hundreds of former Air Berlin staff have already found a new home at the Lufthansa Group, and 8,000 new employees will join the group this year – never before in the history of German aviation have so many people been offered new prospects. Lufthansa Group was also willing to take to take over the Air Berlin subsidiary Niki. As the EU Commission clearly signalled its rejection despite the far-reaching concessions granted by the Lufthansa Group, they had to abstain.

Consolidation is taking place across Europe – the traditional airline Alitalia could also be affected. Lufthansa group has also expressed its interest here. The precondition, however, is a fundamental reorganisation of the Italian airline by its current owners. Only once this has been fully implemented, new perspectives can be developed again at a renewed Alitalia. With the acquisitions of Swiss, Austrian Airlines and Brussels Airlines, Lufthansa has sufficiently proved that it is a good partner for the national airlines of other countries: the airlines are once again generating profits, count as the most popular airlines in Europe for passengers and they also provide employees with good and secure jobs.

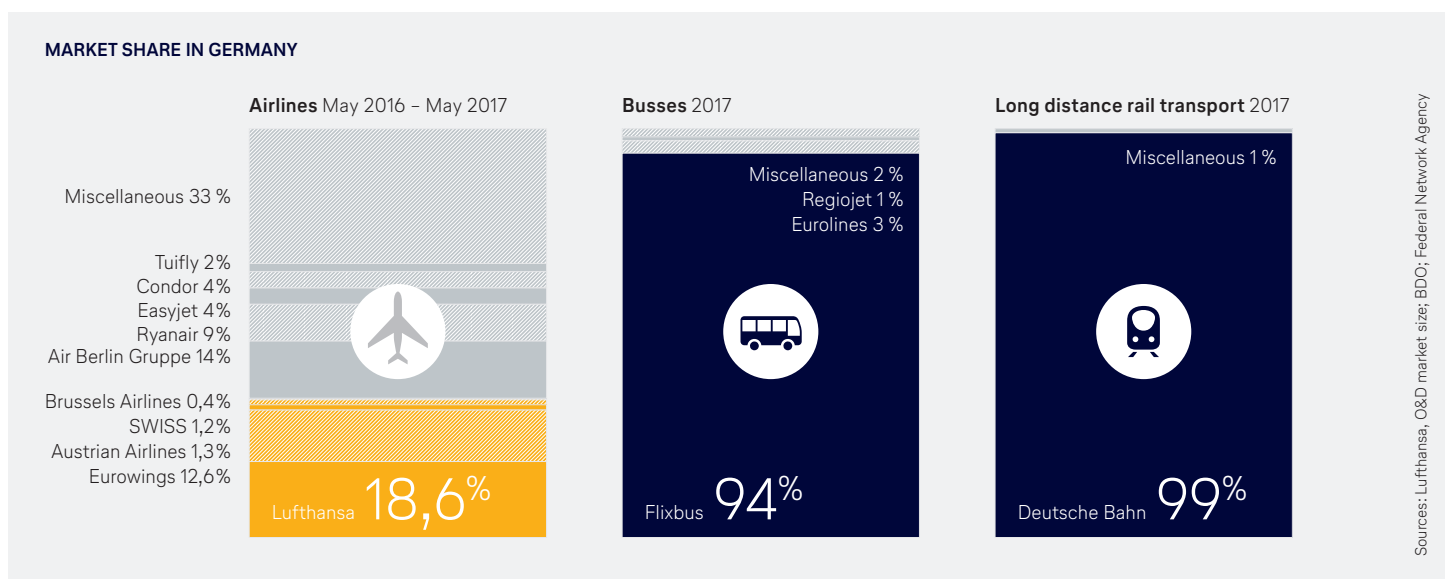
Strong airlines – strong airports

In addition to customers and employees, Lufthansa's home airports also benefit from it being an attractive and powerful airline. The best example of this is Munich – at the World Airport Awards, MUC was chosen as the best airport in Europe. Lufthansa has made a major contribution to this: it draws its Star Alliance partners to the location like a magnet and operates Terminal 2 in conjunction with the airport – characterising it as the world's best terminal.

Air transport, trains and buses

NEW DIVERSITY, NEW COMPETITION

The mobility offering in long-distance transport has been extremely clear for decades. Buses were subject to the strictest regulations and train services on major routes have lacked the necessary speed. This situation belongs to the past: transport carriers are now competing with each other like never before in the long-distance transport sector.



Long-distance buses: wide range on offer for price-sensitive passengers

With the liberalisation in 2013, the number of bus destinations within Germany quadrupled. This means of transportation clocks up 24 million passengers per year and presents especially price-sensitive customers with attractive offers. An enormous consolidation took place within it – Flixbus now accounts for 94 percent of the German long-distance bus market. The company controls 1,200 stops throughout Europe. And the trend is rising: in the German-speaking world alone, around another 140 new stops will be added in 2018. Thanks to this strength on the home market, the Munich-based company is now lining up routes in the United States from summer 2018.

Rail: increasing competition for airlines

Also on course for growth is Deutsche Bahn. In November, the group expected an increase in bookings of ten percent for the next six months, aided by the new high-speed routes between Berlin and Munich. Since 10 December, this journey with the Sprinter is scheduled to only take 3 hours and 55 minutes – a time saving of over two hours. The declared objective of Deutsche Bahn is to take on significant market shares from airlines with these routes. In fact, Deutsche Bahn has no competitors in the long-distance rail transport sector.

Air transport: highest level of competition

The situation for air transport is somewhat different. In Germany alone, 160 airlines are competing with each other. Although travellers had to switch to more expensive booking classes due to the discontinuance of hundreds of Air Berlin connections on certain routes, that was only a snapshot in time. With the takeover of the Air Berlin subsidiary airline Walter, the Lufthansa Group can now further expand its capacity. The British company Easyjet – who took on 25 aircraft from Air Berlin – is also massively expanding its offering, for example to 250 weekly flights from Berlin. The IAG subsidiary Vueling wants to operate Niki routes again in the coming weeks and other airlines want to expand their business from Germany.

Never before has there been such a large selection on offer for travellers in Germany and in Europe. The fact that aviation is currently entering a new phase of consolidation, as it is in other regions of the world, secures diversity in the long run – only well-established airlines can invest billions in fuel-efficient aircraft and even more comfort.

Gulf airlines

HUNDREDS OF MEMBERS OF CONGRESS CALL FOR FAIR COMPETITION

For years, the United States has also suffered from fierce competition from the largest Gulf airlines. The subject is now developing into a first-class political issue.



Germany

UAE/Qatar

		Germany	UAE/Qatar
AIRLINES	Billions of subsidies	No	Yes
	Market behaviour consistent with air services agreements	Yes	No
	Private-sector structure	Yes	No
TAXES	Air travel tax	Yes	No
	Tax on earnings	Yes	No
	Employee income taxes	Yes	No
FEES	Airport charges	High	Low
	Air traffic control charges	High	Low
	Aviation security charges	High	Low
ENVIRONMENT	Emissions trading	Yes	No
	Noise abatement	Yes	No
	Noise-based fees	Yes	No
	Bans on night flights	Yes	No
LABOUR MARKET	40-hour workweek	Yes	No
	Job protection	Yes	No
	Unions	Yes	No
	Right to strike	Yes	No

300 members of the US Congress appealed to the US Government to finally take action against the enormous cut-throat competition from the Gulf carriers. In a letter from the US Congressmen DeGette and Coffman dated 25 October addressed to US Secretary of State Rex Tillerson and US Secretary of Transportation Elaine Chao, it said:

“We are increasingly concerned that jobs are in danger. Studies show that the Governments of Qatar and the United Arab Emirates (UAE) have paid over 50 billion US Dollars in subsidies to the state-owned airlines Qatar Airways, Emirates and Etihad Airways. Driven by the subsidies, these airlines have quickly expanded their business activities to the USA in order to create overcapacity at dumping prices on several international routes, and to push U.S. airlines out of the market.

For example, the Gulf carriers currently fly 36 times a day to the USA – an increase compared to the 12 daily flights only five years ago, whereas no U.S. airline flies to Qatar or the UAE.

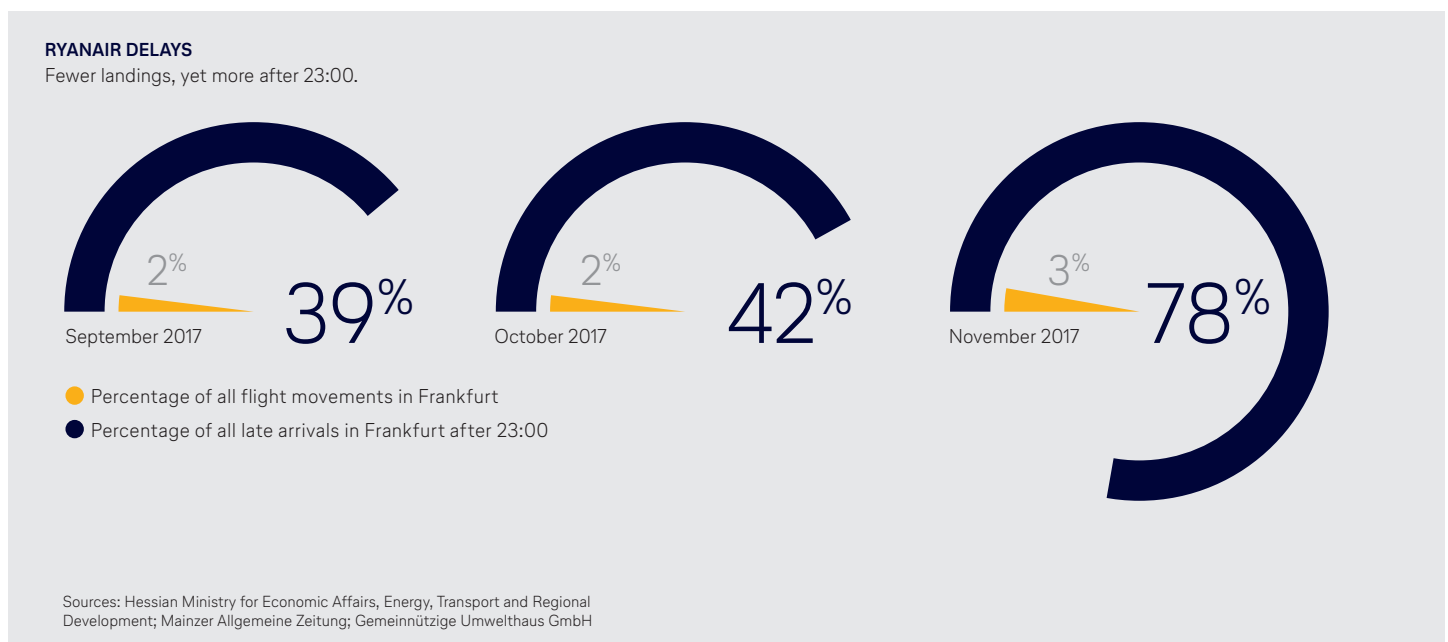
The subsidies that these airlines receive are not compatible with the air transport agreement which both Qatar and the UAE signed 15 years ago. These bilateral agreements aimed to promote fairness in the market – without state interference. If we fail to enforce our trade agreements, we will jeopardise thousands of middle tier jobs and the long-term interests of American aviation.”

A description of the situation and the need for action do not leave a lot to be desired in terms of clarity – and are to a large extent applicable to the competitive situation in Europe and in Germany.

Night rest

ALSO RYANAIR HAS TO ABIDE BY THE RULES

There are very strict restrictions on night flights at numerous German airports. It goes without saying that Lufthansa would respect the rules and also get involved in working towards air traffic being as quiet as possible. It's altogether different at Ryanair: the "at others' cost" airline breaches the night flight restrictions at Frankfurt Airport like no other.



Ryanair has many late night landings

The ban on night flights becomes effective in Frankfurt at 23:00. Aircraft may only land later in exceptional cases, such as in the case of storms. However, it would appear that Ryanair has timed its flight schedule too tightly. As such, between early September and the end of November 2017 over 180 Ryanair aircraft landed after 23:00. The Irish airline was responsible during its first year of activity in Frankfurt for up to 78 percent of all late night landings every month – and that is with a minimum share of the flight movements.

The Hessian Economic and Transport Minister Tarek Al-Wazir said: "Anyone who wants to take off and land in Frankfurt has to stick to the ban on night flights. This also applies to Ryanair." The German aviation authority is now investigating the facts.

Responsible air transport is possible

In contrast to this, the established airlines in Frankfurt behave responsibly. This includes, for example, time buffers in Lufthansa Group's flight plans, so that only in absolute exceptional cases a

special permission has to be utilised. Lufthansa adjusted its flight plan at an early stage and brought the last departure significantly forward from 22:45 to 22:15, as well as the last arrival.

The fact that Lufthansa Group is a reliable partner is also reflected in the continuous effort to invest billions in particularly quiet aircraft, and in advances in precision navigation. A current example: In collaboration with DFS and Fraport, Lufthansa has been testing the so-called Radius-to-Fix (RF) functionality since July 2017. It allows to fly high-precision circular path segments with a fixed radius and fixed starting point, to a unique standard of quality across Germany.

Calling for politics to support the commitment

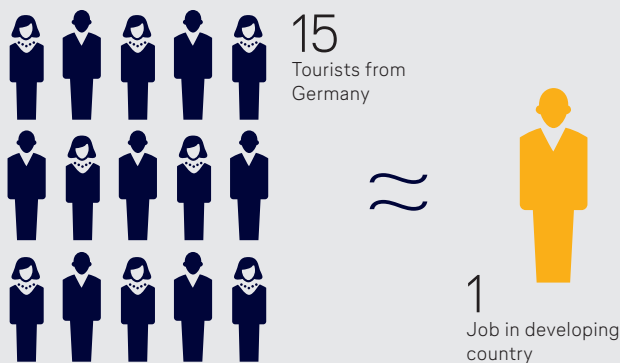
Only financially strong airlines such as the Lufthansa Group can renew their fleets and play a part in quiet air traffic. Politics can assist them in this by ending national special charges. Specifically this means the abolition of air transport tax – which was, for example, reduced by 50% in Austria on 1 January – and co-financing of aviation security costs by the Federal Government.

Developing countries

AIR TRANSPORT PLAYS A KEY ROLE

The economy has been growing for years in emerging and developing countries at an above average rate. The driver is increasing global exchange – in tourism as well as in trade. This would not be conceivable without a strong air transport industry which makes fast and efficient connections possible.

15 GERMAN TOURISTS CREATE ONE JOB IN DEVELOPING COUNTRIES



AFRICA IS A HIGH-GROWTH REGION FOR THE LUFTHANSA GROUP

Lufthansa Group is expanding its involvement in Africa:

- **Brussels Airlines:** The Lufthansa Group's airline has traditionally been strong in African air transport. The airline serves 24 airports on the continent.
- **Logistics:** Lufthansa Cargo also focuses on growth in Africa. The freight subsidiary offers a comprehensive air freight network via the African connections of the German airline company, as well as the freighters on main routes to Johannesburg, Nairobi and Cairo.
- **LSG Sky Chefs:** Lufthansa's catering company alone employs approximately 1,300 staff in Africa. Tens of thousands of meals per day are prepared in South Africa alone.
- **Technik:** Lufthansa Technik has long-standing partners in Africa such as Ethiopian Airlines and South African Airways. In addition, Lufthansa Technik also supports the training of local aviation experts.

Development through tourism

Almost 90 percent of travellers get to their destinations in emerging and developing countries thanks to attractive flight connections. And the travel industry is growing: the World Tourism Organization UNWTO expects another record year. Millions of people will benefit from this locally:

- **Social impact:** Travel also promotes the development of society in holiday destinations. According to a study done by the Federal Association of the German Tourism Industry (Bundesverband der Deutschen Tourismuswirtschaft, BTW), tourists support access to education in a measurable way and with this the literacy of the local population.
- **Job market:** The spending of 15 tourists secures one job in emerging and developing countries, according to the BTW study. Over 11 million holiday-makers from Germany annually travel to the holiday regions. Employment effect: 740,000 jobs.
- **Public infrastructure:** In peripheral regions, the revenue from the travel industry facilitates expensive but important infrastructure projects. These include, for example, road construction or electricity and water supplies. These are important factors in boosting regional economic cycles.

Connection to world trade

In addition to tourism, many developing countries are increasingly benefiting from the international exchange of goods. Air freight is of considerable importance for integration into global trade. For example cut flowers: Kenya exports 120,000 tonnes of cut flowers per year all over the world by air freight. In the EU, every second rose comes from this country on the equator, for example. This secures nearly 100,000 jobs in Kenya and also contributes to the quality of the jobs. Background: consumers in Germany and Europe are increasingly supporting sustainably produced goods – one in every six Kenyan flower farm is producing today using fair trade initiatives.

Aviation is therefore a strong partner for development policy. Lufthansa Group plays an important role in this. See Africa: the airlines Lufthansa, Swiss, Austrian Airlines and Brussels Airlines currently fly 630 flights to Africa every month and carry around 120,000 passengers on these routes.

Telegram

The Aviation Oscar goes to...

LUFTHANSA!

At the beginning of December, the renowned aviation experts from Skytrax awarded Lufthansa the coveted five star quality seal. Never before has an airline outside of Asia received this award. Edward Plaisted, Chief Executive Officer of Skytrax: "Lufthansa is the first European airline to have been admitted to the ranks of the five-star airlines. This is not only a high distinction, but also expresses great recognition for the progress that the airline has made in recent years, especially with regards to service." The testers from Skytrax assess hundreds of aspects both on the ground and in the air, including on-board service, seat comfort, catering, security measures and inflight entertainment.



A380 maintenance

LUFTHANSA COUNTS ON DRESDEN

Lufthansa sends two of its Airbus A380 aircraft to the so-called Intermediate Layover Check at Dresden: over a period of several weeks, the Elbe Flugzeugwerke (EFW) check the aircraft, dismantles large aircraft components such as landing flaps and completely disassembles cabin parts such as seats, kitchens, and toilets. The maintenance assignment represents an important element for EFW, in order to safeguard its more than 7,000 jobs.

2017

THE SAFEST YEAR IN COMMERCIAL CIVIL AVIATION

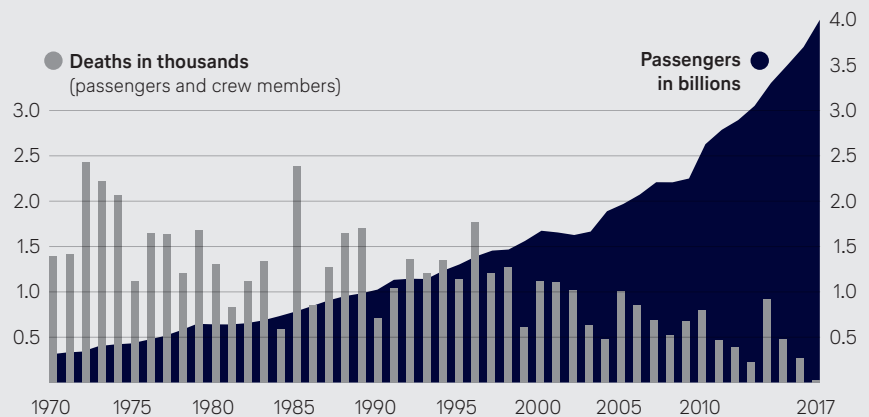
Passenger numbers have been rising continuously for many years. At the same time, the number of fatally injured has decreased: in 2017 a total of 79 people lost their lives, which historically equates to a new world safety record. Among these were 44 passengers and crew members, as well as 35 people who were killed due to a cargo plane that crashed during landing in Bishkek/Kyrgyzstan. In Europe there were no accidents which resulted in death in commercial civil aviation.

The statistical probability of being killed by a plane crash in 2017 was found to be 1 to 92.7 million. In the 1970s, the ratio was still at 1 to 264,000.

Safety has therefore increased by a factor of 350. This development underlines the efforts that aircraft

manufacturers, airlines, airports and air traffic control are making to reach a maximum level of safety.

DEATHS IN COMMERCIAL CIVIL AVIATION* AND VOLUME OF PASSENGERS WORLDWIDE



Sources: Aviation Safety Network 2018, UN Aviation Organization ICAO; * Aircraft with a capacity ≥ 14 passengers

Telegram

Climate protection ranking

LUFTHANSA GROUP TAKES THE TOP SPOT

The climate protection strategy of the Lufthansa Group focuses on transparency and effective measures. This is being recognised – in mid-October, the renowned, non-profit rating organisation CDP once again awarded the Lufthansa Group for their achievements in the field of climate protection. The Group’s extensive reporting on CO₂ emissions, reduction strategies and measures, as well as climate risks has been evaluated with an A rating. With this, the Group achieved the “Leadership Status” and belongs both to the top group in the airline industry as well as to the top group of global industrial companies.

Just a few weeks later, the Lufthansa Group once again received “Prime” status in the oekom Corporate Rating of November 2017, and thus belongs to the group of 69 rated companies in the sector known as the “Industry Leaders” group. In the rating process, the social and environmental performance of companies is assessed based on more than 100 industry-specific selected social and environmental criteria.



Berlin

NEW YORK BACK ON THE TXL FLIGHT SCHEDULE AGAIN

Since the beginning of November, Lufthansa has been connecting Germany’s capital city with New York 5 times a week. This means that Berlin, after Frankfurt, Munich, Dusseldorf and Cologne is the fifth German city from which the Lufthansa Group now offers flights to the USA. No other European airline flies to the USA from so many of its home locations.

Punctuality

RESEARCH PROJECT WITH THE DLR

The DLR and Lufthansa Systems are jointly involved in a research project on a robust flight plan. The goal: to optimise flight planning for increasing passenger flows, faster aircraft and disruptions during the process. The project is funded by the Federal Ministry of Education and Research.

Change in Lufthansa Corporate International Relations and Government Affairs

FROM THOMAS KROPP TO KAY LINDEMANN

From March 2018, Dr Kay Lindemann will be the new Head of Corporate International Relations and Government Affairs as well as authorised representative of Lufthansa Group’s Executive Board. He succeeds Thomas Kropp, who has headed the Corporate International Relations and Government Affairs division since 2002 – for four Chief Executive Officers – and has reached retirement age and will retire from the Lufthansa Group after almost 24 years. Kropp, a lawyer, came to Lufthansa in 1995 and was Head of the EU Representative Office in Brussels until 2002. He had previously been Head of the Representative Office of the Konrad Adenauer Foundation in Buenos Aires.

Among other things belonging to the Corporate International Relations and Government Affairs division, there are political representations in Berlin, Brussels, Beijing and Moscow, as well as the Group’s environmental department. Since 2010, Dr Kay Lindemann was a member of the executive board of the German Association of Automotive Industry (VDA) and responsible for the areas of economic policy, markets, climate protection, transport policy and European politics. He previously held different positions for the Federation of German Industries (BDI) from 2002, including Head of the Department of Energy, Transport and Telecommunications. He studied law in Germany and in the UK.



DR. KAY LINDEMANN



THOMAS KROPP

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