Restart, regain, restore

Key deliverables from ACI EUROPE’s Off The Ground Recovery Plan

A ‘green’ recovery

Concrete insights for a sustainable COVID-19 recovery

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Strengthening Munich Airport’s role as a leading European hub in the post-COVID-19 era

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With Carlos Muñoz, Founder and CEO, Volotea

INNOVATION SHOWCASE
Passenger-focused innovation

LUXTTICA
Luxottica unveils its ‘Shield Your Eyes’ initiative to better ensure the safety of its customers and employees
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Together these solutions help drive compliance for the industry and increase confidence for passengers.

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Ring this Summer issue of AIRPORT BUSINESS to you is yet another tangible signal that our industry is slowly getting back on its feet. For us at ACI EUROPE, it is also part of getting back to some sort of normalcy.

For nearly 4 months, all our energy and resources have been absorbed by the COVID-19 crisis. From the moment airlines stopped operating and air connectivity essentially collapsed, our absolute priorities have been to secure the conditions that would allow for a restart, to communicate how airports were being impacted and to outline what relief they needed to survive and come back as engines of economic recovery.

These endeavours have led us to work hand in hand with all other industry stakeholders. They have also required getting even closer to the European institutions and reaching out to national governments across the continent. I would like to take here the opportunity to thank the European Commission and EASA for their close cooperation with us. EASA’s COVID-19 Aviation Health Safety Protocol has been instrumental in ensuring uniform sanitary measures at airports and thus restoring the confidence of the travelling public. Similarly, without the European Commission’s drive for a coordinated lifting of travel restrictions both within the EU/Schengen and externally, we would definitely not be where we are today.

At a time when the EU project continues to be questioned – with its benefits too often ignored or at best taken for granted – we, as an industry, ought to acknowledge the fact that it is the EU that has effectively enabled the restart of aviation.

Another challenge lies ahead though. With many European governments providing massive but selective financial support to airlines, we are now faced with huge imbalances in the air transport ecosystem. Believing that such aid naturally flows down to airports and other suppliers is to be naïve. The harsh reality of the post-COVID-19 aviation market is already being felt by airports of all sizes across Europe. It is about relentless pressures to further rebate or wave airport charges altogether and much increased airline dominance. Combined with increasing renewed State interventionism, all this threatens the integrity of the Single European Aviation Market. We trust and rely upon the European Commission to ensure that such integrity will be safeguarded.

Airports have been as hard hit – if not more – as airlines and other aviation industry stakeholders. For many, closing down was just not an option. During the darkest moments of this crisis, they kept serving communities and economies – at huge cost – bringing relief services and supplies and repatriating the displaced. Their stories were so powerful that our website under the “We Are Aviation” banner was one of the largest sections we’ve ever run.

This is what we now build on as we are moving from restart to progressive recovery. As I write these lines, our latest forecast indicates that Europe’s airports are set to lose 1.57 billion passengers in 2020 – a decrease of -64% compared to last year. This is close to 16 times the passenger volume lost in 2009 in the wake of the Global Financial Crisis. We do not see a full traffic recovery before 2023 at the earliest. On the back of unprecedented demand and supply side pressures.

It is obvious that continued consumer confidence will remain an absolute pre-requisite. Airports, already centres of excellence when it comes to safety, now broaden that skillset to encompass health and wellbeing. There is every reason to believe that this comes with an acceleration of some trends which will transform our sector for the good. Increased innovation and digitalisation, already underway but further triggered by an imperative for touchless and remote systems. And, crucially, our undiminished commitment to decarbonisation. We’re working tirelessly to secure aviation’s place in sustainable recovery funding strategies – to “Build Back Better” and enable Europe’s airports to deliver on their Net Zero 2050 pledge.

These efforts, and our enormous push towards a supported restart and recovery via our OFF THE GROUND project which you’ll read more about in this edition, culminated in our recently published 10 Commitments and 10 Recommendations. In these, the airport industry commits unequivocally to keeping passenger confidence and safety at the heart of what we do. We urge Governments and Authorities to match our own commitments with future-proof regulatory certainty, a level-playing field in support and relief, and clear plans to reinvigorate air connectivity and tourism.

All this will keep us very busy in the months ahead. Together with my team, I relish the challenge – as the past months have made us even more passionate about airports and air connectivity.

By Olivier Jankovec, Director General, ACI EUROPE

Serving airports at a critical time
**Moscow Sheremetyevo Airport**

Sheremetyevo Airport has made the needs of children – and adults who are travelling with children – a high priority in the design and functioning of its terminals. A total of six baby- and child-care rooms, open play areas and changing rooms are now available in all terminals, including in the business and VIP lounges. All these dedicated areas include play corners with toys and game consoles, sleeping areas, kitchenettes and rooms for feeding babies and changing diapers. Children’s playgrounds and play areas are equipped with child-safe equipment that is updated annually. All the childcare rooms are manned by specially qualified staff to ensure these young clients have fun in the safest environment.

**Istanbul Airport**

Istanbul Airport has announced the opening of its third runway. With this, the airport becomes the first in Turkey and only the second in Europe to operate three independent parallel runways. This new airstrip will reduce taxi time significantly. On average, landing times will decrease by seven minutes and take-off times by four, with domestic taxi times being reduced by approximately 50%. The capacity for flight movements per hour will also increase from 80 to 120 with a daily capacity of more than 2,600 movements. When the entire construction is completed, the airport will have six runways and a total capacity of 200 million passengers per year.

**Brussels Airport**

Each year, Brussels Airport has thousands of animals among its passengers. These include pets, police dogs, reptiles and horses, and even an occasional panda. In order to offer the best possible service in the field of animal transport, Brussels Airport has invested in a brand-new Care & Inspection Center, in the cargo area of Brussels Airport. There, animals can be housed and checked in the most comfortable surroundings before they continue their journey. The temperature, the type of light and the air circulation in each area can be precisely adjusted thanks to a unique innovative system that has been developed specifically for this centre. The Animal Care & Inspection Center opened its doors on 1 June 2020.

**Frankfurt Airport**

Frankfurt Airport is set to turn to wind power to provide the bulk of its electricity as part of its ongoing commitment to meeting its climate protection targets. Its operator, Fraport AG, intends to set an annual minimum purchase quantity of up to 350 gigawatt hours with the operator of an offshore wind farm with a target deadline of 2025. Fraport remains committed to covering most of Frankfurt Airport’s electricity consumption using renewable sources by 2030. The company plans to eliminate all emissions and be CO2-free from 2050. The use of renewable energy is a key factor in meeting its self-imposed climate protection target.
Manchester Airport now provides the opportunity to pre-book a free 15-minute security slot, as part of a new UK-first trial by Manchester Airports Group. By booking their free slot, the passengers will benefit from access to a dedicated lane straight to the security checkpoint and will be able to reach the departure lounge more quickly. This approach will also allow the airport to manage the volume of passengers coming through security more efficiently and help keep queues shorter. The availability of slots is limited and will be operated on a first-come, first-served basis, through online booking. Passengers will be encouraged to make a booking around two hours before their flight departure time and are asked to arrive within the chosen slot.

Toulouse-Blagnac Airport has co-signed a framework agreement for the construction of the first green hydrogen station at its premises. The signatories include Toulouse-Blagnac Airport, AREC Occitanie, and Engie Solutions. The new station will supply hydrogen to four buses that will circulate at the airport. The new low-emission vehicles will be operated by Transdev, a French international private public transport operator, on the airport runways, transporting passengers between the terminals and airplanes. The buses will also provide shuttles between the terminal and far car parks. The new station is part of the French national project HyPort, which was launched in the Occitanie region, via AREC and Engie, as part of the European project JIVE2.

Veovo has won Swedavia’s tender to provide automated revenue management across all the Swedish airports operated by the company. By fully automating the collation, preparation and processing of billing data in real-time, the new system will reduce revenue leakage, minimise billing errors and improve the cash cycle time. It will also give greater visibility into vital income-generating streams across all Swedavia’s operations. The system’s flexibility will also support Swedavia in building innovative and competitive tariff structures to attract new airlines and incentivise route expansion. It will also provide a platform to fuel sustainable growth.

The staff of Makedonia Airport are welcoming international passengers to Thessaloniki with the tourism logo of the Greek northern city on their face masks. The masks were provided by the Thessaloniki Tourism Organization and Fraport Greece, the operator of Makedonia Airport, to mark the reopening of the city’s airport to international flights following three months of COVID-19 travel restrictions. The new face masks aim to present the city’s “hospitalise face” to visitors, while ensuring their and the airport staff’s health and safety in direct interactions.
It’s a beautiful, sunny, early-spring morning in mid-February when we arrive at Milan Linate Airport for our interview with Armando Brunini, CEO of SEA Milan Airports. The snow-topped peaks of the Valle d’Aosta are visible as we make our descent. As we land, the airfield is a hub of activity, with Alitalia, easyJet and Lufthansa aircraft all preparing to depart.

We meet on a typically busy day of meetings for Brunini and he is energetic as we discuss the myriad developments taking place across both Malpensa and Linate airports. Indeed, Linate is being restyled and is a hive of activity as we tour the terminal.

The only sign that COVID-19 has arrived in the Lombardy region is the temperature check at immigration, but this feels merely precautionary. Less than a week after our return to London, however, events overtook us.

“Milan was the first Western metropolis to be hit by the pandemic and to be engaged in the fight against the virus with the introduction of a lockdown,” Brunini begins. “Current estimates foresee a -40% loss of inbound travel and nearly -60% negative impact on MICE (meetings, incentives, conferences, exhibitions) business this year. The measures imposed are showing clear results and since 3 June travel within Europe is allowed.”

Milano&Partners, the promotion agency of the city of Milan, recently launched a new YesMilano communication campaign – “A new start. One step at a time” – which is promoted by the Municipality of Milan and the Chamber of Commerce of Milan Monza Brianza Lodi, and supported by SEA Milan Airports.

“Lombardy is the third-largest manufacturing region in Europe in terms of number of employees and Milan’s per capita GDP is 30% higher than the European average – it therefore has the resilience to sustain a strong recovery,” says Brunini.

“Acting fast, readapting continuously, communicating frequently”

Brunini took the helm as CEO of SEA Milan Airports in January 2019 after acquiring extensive experience in the airport sector, which has seen him play a key role in the considerable growth of air traffic, first as Managing Director of Bologna Airport (2007-2013) and then as CEO of Naples Airport (2013-2019). Indeed, under Brunini’s leadership the airport of Naples tripled its growth compared to the national average, recording an increase of 82% in passenger traffic in five years.

After having led the development and transformation of the airports of Bologna and Naples, he is now fully committed to leading SEA Milan Airports, the airport system serving one of Europe’s most dynamic cities, to its full potential.

2019 saw considerable growth at Malpensa, strengthened by the three-month closure of Linate for runway refurbishment works and the temporary transfer of traffic from Linate to Malpensa. Therefore, Malpensa grew by 16.9% to 28.7 million passengers last year. Net of the activity transferred from Linate, traffic was up 9.1% to 26.8 million passengers. It was a year of expansion at Malpensa, with 40 new services, two new airlines and 13 new destinations, including two major long-haul services to Los Angeles and San Francisco.

The positive trend continued at the beginning of 2020, with 10 new services, four new airlines and seven new destinations, among which three new intercontinental services stood out: Eva Air to Taipei, ANA to Tokyo, and Gulf Air to Bahrain.

Then, after the COVID-19 crisis hit in late-February, within only a couple of weeks passenger traffic dropped by -99%.

“So basically, we have been working with close to zero income for the last three months. Only cargo saw a limited reduction in volumes,” Brunini comments. “We
entered the crisis only a few weeks before the rest of Europe and the world, so we are facing the same challenges and I am sure that we are often adopting similar approaches. In a nutshell we are acting fast, readapting continuously, and communicating frequently and frankly with all stakeholders and especially staff.”

SEA Milan Airports certainly responded quickly. Just 24 hours after the establishment of the first “red zone” in a small city near Milan, the airport operator set up a Crisis Committee and defined 10 working streams with dedicated project teams. “The first to kick-off and deliver results were aimed at containing health risk, cutting costs and preserving cash position,” Brunini explains. “After a few weeks our efforts were also very much dedicated to facilitating the recovery of operations and trying to imagine what possible ‘landscape’ and what structural changes we might find when the crisis is over.”

The first signs of recovery

In order to limit costs, passenger traffic has been operating only from Malpensa’s smaller Terminal 2, which has remained open throughout the crisis providing services for essential travel. To accommodate growing traffic volumes, within the framework of relevant COVID-19 safety measures, activity was transferred to the airport’s larger Terminal 1 on 15 June.

“Since the beginning of June restrictions are being gradually lifted and we are seeing the first signs of a recovery, with many of our most important airline clients planning to restart or increase their operations between mid-June and the beginning of August,” says Brunini. “Nevertheless, undoubtedly this coming summer will represent a fraction of normal volumes.”

As traffic grows and restrictions are loosened, Linate, which is temporarily closed, will also be reopened. A major refurbishment of the terminal is currently in progress.

“It is important that, in this negative scenario, we find a positive project in order to convey a message of encouragement to the market and our community,” says Brunini. “In the midst of COVID-19 we announced the establishment of Wizz Air’s first Italian base at Malpensa. They will begin flying in July with five based aircraft.”

The positive news, announced at the end of May, will see five A321s based at Malpensa. Complementing the eight routes already operated from the airport, Wizz Air has announced 20 new services to 11 countries from Malpensa, starting in July. As passenger traffic returns, comprehensive health and safety measures are being implemented. These centre on three key pillars: social distancing and masks, special cleaning procedures, and temperature measurement both at departures and arrivals.

“We have a massive campaign to inform passengers, signage throughout the airport, and extra staff to monitor consistent behaviour,” Brunini explains. “It is clear to us that social distancing in particular is an understandable measure in this phase, but also that it is not viable in the longer-term since it limits throughput by at least 50%.”

Meanwhile, SEA Milan Airports in collaboration with ENAC, the Italian Civil Aviation Authority, has signed to participate in the health and safety measures recommended in the COVID-19 Aviation Health Safety Protocol, jointly developed by EASA and the European Centre for Disease Prevention and Control (ECDC).
Linate’s €100 million holistic refurbishment

A new five-year strategic plan was approved by the Board of SEA Milan Airports shortly before the COVID-19 crisis. This focused on five key pillars: passenger experience, continued growth, people engagement, cost optimisation, and sustainability (Malpensa and Linate are both accredited at Level 3+ Neutrality of ACI’s Airport Carbon Accreditation).

"Of course, we will need to work on a new strategic plan,” Brunini explains. “Some of the pillars of our ‘20-24’ plan will probably be confirmed but readapted, such as the enhancement of seamless and pleasant travel for our passengers, and a firm commitment on sustainability. Undoubtedly, the CAPEX plan will be redesigned with less need for infrastructure development and an even greater focus on technology. We will also need to be open to possible changes to our business model.”

Linate Airport is currently undergoing a holistic refurbishment. The €100 million investment began in 2018 and is scheduled for completion in spring 2021. The first projects included a new façade and a new arrivals hall, while the three-month closure of Linate last year enabled runway refurbishment works and the installation of a new hold baggage screening system.

On our tour of the terminal, we see striking, vibrant new retail areas taking shape. “At Linate, you’ll see a different flavour and a different atmosphere," says Brunini. "We’re doubling the commercial space. We have 10 new brands coming and 15 of the existing shops are being totally renovated. So, commercially, it is going to be a new experience.”

There are also plans for an omnichannel approach, with the physical retail offer complemented by a digital marketplace. The commitment to enhancing the passenger experience is also evident in the Face Boarding project being trialled throughout 2020 in collaboration with Alitalia on the flagship Milan Linate-Rome Fiumicino route. The biometric technology enables travellers enrolled in the trial to go through security and boarding using facial recognition, without needing to show an identity document. Brunini describes it as a seamless process that, technically, is working very well.

"The first ambassadors and marketeers of Milan”

Looking ahead, SEA Milan Airports is among the hosts of World Routes 2020, which has been rescheduled to November. "It’s a great opportunity for the industry to finally reunite, hopefully in person, and it could be an event that symbolically represents moving back to a positive growth momentum. We are happy that this will happen in Milan,” says Brunini.

Milan is a city renowned as an icon of fashion and design, and is home to major brands including Armani, Gucci, Prada and Versace, to name just a few. It is also Italy’s financial capital, while Lombardy has the fifth-largest GDP among European regions at over €390 billion.

Incoming business traffic, therefore, is strong at both Malpensa and Linate. A key target is to further increase incoming leisure traffic, and last year Milan was among the world’s hottest travel destinations. The MasterCard Global Destination Cities Index 2019 positioned Milan as fifth in Europe and 16th globally, with 9.1 million international visitors.

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and marketeers of Milan and Lombardy to the world,” Brunini comments. “When we present a case to an airline to open a new route or increase frequencies, we give a clear view of the strengths and potential of this region. We have also partnered with the destination management organisation, Milano&Partners, not only on developing routes, but on promoting Milan as a destination.”

He explains that for Malpensa there is a strong focus on increasing intercontinental services, particularly to Asia and North America, as well as consolidating important relationships with low-cost carriers such as easyJet, Ryanair, Vueling, and Wizz Air.

**Coming out of the crisis with fresh innovations**

With such an unprecedented crisis as COVID-19, it remains too early to make accurate projections about the recovery of airport traffic. “Sentiment seems to be continuously changing,” says Brunini. “My ‘bet’ in this moment would be that we will get back to 2019 volumes, but with a different structure of the market, between 2022 and 2023. That is, of course, hoping we don’t get a bad second wave of the pandemic.”

This year, of course, is about weathering the storm and minimising damage, while also preparing for the restart and anticipating new opportunities.

“For the future, we want to find even better ways to be of service to Milan and Lombardy, with sustainability high on the agenda. It will be tough, and it might take some time, but SEA Milan Airports is resilient and we hope to come out of the crisis with fresh innovations while safeguarding as many jobs as possible.”
THAT’S WHY WE INTEGRATE OPERATIONAL SOLUTIONS TO BOOST AIRPORT PERFORMANCE.
The full magnitude of the COVID-19 pandemic hit Europe with speed and shocking force. An escalating health issue in Asia was, within a matter of a few short and bewildering weeks, a near-global lockdown as the world braced. Our industry was of course amongst those feeling the full impact from the start. No-one reading this needs reminding of the images of row upon row of aircraft parked on the tarmac, and deserted terminal buildings.

In Brussels, ACI EUROPE was not only in crisis management mode, reporting on traffic data and representing our issues to the media and stakeholder audiences. We immediately set our minds and actions to restart and recovery. To paraphrase our President Jost Lammers, we could not afford to exit this crisis in the way we entered it. And so project Off The Ground was launched.

**Restart, regain, restore**

The core objectives of the Off The Ground project were threefold – to look towards the safe and smooth restart of operations, to regain passenger confidence, and to restore air connectivity. Clearly, this was a complex operation given the breadth of issues and the diversity of audiences with whom we needed to engage, and our imperative to influence and inform.

Mapping our outputs, we immediately began to plan for a range of position papers, guidance materials, tools and best practice sharing for our members. These activities, combining intensive policy advocacy with unprecedented communications co-ordination to reach industry, media, decision makers and consumers alike, were quickly underway. The project may have been multi-faceted, but the goals were straightforward: a co-ordinated and aligned EU, and the future viability of the airport industry and aviation as a whole.

**Airport Business spoke with Morgan Foulkes, Deputy Director General of ACI Europe, about the Off The Ground project**

**What made you realise that a project like Off The Ground was needed?**

We entered this crisis in a completely un-coordinated way with European countries closing their borders one after the other. Within a matter of weeks, freedom of movement within the Schengen area was gone. This was the worst possible scenario for our industry and unprecedented in modern aviation history. Many airports approached ACI EUROPE asking for coordinated action to address the multiple challenges vis-à-vis their airline customers and regulators. The real wake-up call for me was when a civil servant from a major aviation country in Europe told me “Don’t rely on Member States to re-open or relaunch aviation because it will not happen. You need to come up with an industry plan that we can build upon”. And he added “Put a robust case forward and don’t work in silos, work with the airlines”.

**What sets the ACI EUROPE Off The Ground initiative apart, and how would you rate its success so far?**

There were multiple initiatives like ours at both European and national level. That’s a good thing, because it focused minds on the need to find a way out of the crisis and on the restart and relaunch phase. What characterises Off The Ground is: it was launched in the very early days of the crisis, and it had a very broad scope covering many different aspects of our industry. The timing allowed us to provide input to decision-makers early on and to influence the process in a meaningful way on topics such as conditions of the restart, facilitation, health and safety, ground handling, State Aid, aviation security, capacity building, and economics.

**Were there any surprises in the process? Any unexpected findings?**

The most unexpected outcome of the crisis for me was the fact that it re-enforced the dominance of airlines in the airport-airline relationship in such an unprecedented way. This is the result of European governments financial rescue packages being targeted at large airlines coupled with the restructuring and downsizing of airlines. Airlines are now squeezing airports for huge discounts in charges in return for allocating their scarce assets.

**What do you think will be the lasting effects of Off The Ground, beyond immediate recovery after the COVID-19 crisis?**

The crisis cast new light on topics needing reform, such as slots, liberalisation, State Aid and airline ownership and control, making the need for reform even more acute in these areas. A number of our Off The Ground papers focus on the medium to long term and make strategic recommendations to help airports regain some of the connectivity lost during the crisis. These short recommendations will form the basis of a more developed advocacy to help our members face the challenges, and make the most of the post-COVID European aviation landscape.
Future-proofing outputs: a strategic and comprehensive approach

Moving the project forwards, we followed a twin-track approach: to tackle the immediate crisis and ensure the airport industry’s place in all policy discussions around restart and recovery, but also to look to the longer term. Paving the way not only through restart but to sustained economic health was a must. Yet time was clearly of the essence, and to this end we quickly mobilised the expertise and manpower of our membership via our committees and fora. Within a matter of a few short weeks, the recovery plan emerged and a range of guidelines and policy documents were in circulation.

Restart and operational issues, unsurprisingly, initially dominated the agenda. A mapping and assessment of sanitary measures, the commissioning of independent medical advice, and work with ACI WORLD and IATA were immediate priorities alongside establishing a plethora of working groups drawn from our membership. At the same time, communications teams built campaigns and platforms to ensure that the essential work which airports continued to undertake – facilitating relief services, repatriation flights and keeping supply chains moving – were recognised, and airport personnel were celebrated. Operational and business continuity remained a constant, whilst lobbying intensified around the need for any relief measures to be applied equally across all parts of the industry, never favouring one player over another.

Today, with the gradual lifting of border restrictions and the restart of services, our Off The Ground project culminates with two landmark documents: our industry’s 10 Commitments to Passengers, Communities and Authorities, and a corresponding 10 Recommendations to National Authorities and the European Institutions. Our Commitments include a pledge to fully implement national health safety guidelines based on the EASA / ECDC COVID-19 Aviation Health Safety Protocol, to enhance standards of cleaning and disinfection throughout airport premises, to encourage the use of touchless technology, biometrics and innovative solutions to reduce queues, and to ensure clear and up-to-date communication on health and sanitary measures to passengers. The Recommendations, which under-line airports’ critical role in the economic development and the connectivity of their regions and communities, call on National Authorities and European Institutions to support industry’s own commitments and investments with proportionate regulation which must be risk-based and fit for purpose. ACI EUROPE asks policymakers to develop a clear plan to re-build air connectivity and re-invigorate tourism, championing collaboration at national and European levels and ensuring that no supporting measure benefits one actor in the air transport eco-system at the expense of another.

Looking to the future, we’re shortly to launch our Guidelines for a Healthy Passenger Experience at European Airports, which will not only provide a set of tools for all airports as we emerge from this crisis, but also ensure a robust response and recovery in the face of future scenarios. We’re also reaffirming our commitment to a sustainable recovery and the Net Zero 2050 commitment made by our industry – part of a concerted industry determination to ‘Build Back Better’.

You can find out more about all the Off The Ground initiatives, along with a show-reel of all the measures put into place by our members as we restart services, by visiting the ACI EUROPE website (www.aci-europe.org/industry-topics/covid-19.html).
SUPPORTING AIRPORTS TO APPLY FOR CONNECTING EUROPE FACILITY FUNDING.
European airports commit to confidently and safely work to restore European air connectivity and the economy by:

1. Implementing all necessary measures to ensure a swift, safe and coordinated recovery of operations. Our priority is delivering the highest quality passenger experience.

2. Fully implementing the guidelines agreed at national level. We call for national alignment with the EASA/ECDC COVID-19 Aviation Health Safety Protocol - in order to achieve optimal and harmonised risk mitigation for passengers and staff health along with their psychological well-being.

3. Enhancing standards of cleaning and disinfection throughout airport premises in close cooperation with all relevant stakeholders; including health and aviation authorities, customs, border control, airlines, service providers and retailers.

4. Ensuring clear, up-to-date and comprehensive communication of health and sanitary measures to passengers and staff, in particular our most vulnerable travellers - passengers with reduced mobility and the elderly.

5. Encouraging greater use of touchless technology, biometrics and innovative solutions to reduce queues, bottlenecks, crowded areas and cross-flows. Enhancing cooperation with airlines to promote the exchange of passenger information in advance of travel.

6. Encouraging responsible passenger behaviour, especially by encouraging passengers to assess their own level of health risk ahead of their journey and avoid travelling in case they have any symptoms.

7. Continuing climate action towards the target of Net Zero CO2 emissions for operations under their control at the latest by 2050, while at the same time supporting the broader decarbonisation of aviation - in line with the objectives of the European Green Deal.

8. Continuing to contribute positively to their communities and seeking to minimise any negative impacts.

9. Guaranteeing safe and secure operations throughout the passenger journey to ensure that aviation continues to be the safest and most comfortable travel experience possible, for all passengers. Through continued investment, ensuring that European airports remain world leaders in safety and security.

10. Striving to jointly develop with industry and institutional partners a new air transport system that is resilient to future crises.
10 RECOMMENDATIONS TO NATIONAL AUTHORITIES AND EUROPEAN INSTITUTIONS TO RESTORE AIR CONNECTIVITY IN THE WAKE OF THE COVID-19 CRISIS

Airports play a critical role in the economic development and the connectivity of their regions and communities. European regions rely on aviation for their connections to the rest of Europe and the world. We are economic enablers; a 10% increase in direct air connectivity generates around 0.5% increase in GDP per capita and vice versa. Air transport supports 12.2 million jobs and €700 billion in European economic activity. That is 3.3% of all employment and 4.1% of all GDP in European countries.

European airports call on national authorities and European institutions to:

1. Follow the operational guidelines developed by EASA/ECDC in its COVID-19 Aviation Health Safety Protocol, where applicable, and work in a coordinated way at EU level to restore air connectivity within Europe, and with the rest of the world.

2. Ensure that any additional sanitary measures that may be imposed, over and above those set by EASA/ECDC, should be strictly risk-based, limited in time and re-evaluated under a fixed schedule. It should be noted that European airports are amongst the cleanest and most hygienic mass transportation infrastructure and public spaces in Europe.

3. Ensure that airports obtain clear advance notice of any changes in sanitary measures that could impact their capacity, and a common recognition that the terminal capacity available as a result of any such measure might limit the traffic which can be handled and the development of air connectivity.

4. Remove any regulatory obstacles to enabling such things as mobile or home printed boarding passes, electronic or home printed bag tags and personal data capture online. This will minimise passengers use of touchpoints as well as time spent in congested areas.

5. Put in place a targeted European Aviation Relief Programme to ensure balanced and non-discriminatory supporting measures for all affected aviation industry stakeholders, including airports, airlines, ground handlers, caterers, commercial concessionaires and Air Navigation Service Providers. Investments and costs related to public health measures should be borne by governments.
6 Ensure that economic regulation reflects fast changing competitive dynamics and that:
   – related outcomes effectively protect the interests of passengers in the long term
   – airports are financially viable and able to maintain their capacity to invest in digitalisation and decarbonisation
   – supervisory authorities provide flexible frameworks that allow airports to support the recovery while continuing to have financeable long-term capital investment plans

7 Facilitate the recovery of non-aeronautical revenues - innovative new approaches will be required to re-invigorate these crucial sources of income and keep airports competitive

8 Allow for the deferral of investments in the area of aviation security without compromising the current high level of aviation security in Europe and enable innovative solutions through progressive, targeted and risk-based security regulations

9 Develop a clear plan to re-build air connectivity and re-invigorate tourism by:
   – championing effective collaboration with industry at national and European levels
   – temporarily subsidising the uptake of routes to quickly restore a basic level of air connectivity
   – facilitating further aviation liberalisation (market access) in particular at niche, secondary hubs and regional airports
   – avoiding an unnecessary waste of airport capacity by ensuring a swift return to the pool of slots unused as a result of the waiver to the usage rule or in case of airline bankruptcy
   – recognising the structural financial viability challenges faced by small regional airports and ensuring necessary targeted public funding for these airports
   – ensuring that any measure supporting one actor of the air transport ecosystem is not at the expense of another actor

10 Prioritise all measures allowing the effective support of a wider use of Sustainable Aviation Fuels, invest significant R&D funding in new aircraft technologies and fully implement the Single European Sky.
Key aviation stakeholders discuss COVID-19 impact and recovery

Aviation is a strategically important sector making a vital contribution to Europe’s overall economy and employment. Here, key stakeholders from across the industry share their thoughts on the impact of COVID-19 and the recovery actions needed. Interviews by Ross Falconer

Eamonn Brennan, Director General, EUROCONTROL

“Traffic was down by 89% in April 2020, and by 86% in May, and yet EUROCONTROL has still continued to operate. Our income comes from route charges and much of our costs are fixed so, like everyone else, we have a cash crisis. At the same time, we have to keep ATM running: there are still thousands of flights every day, many carrying important cargo such as medical supplies, and others repatriating European citizens. We have worked with our partners across Europe to make sure that Business Continuity Plans are in place, to harmonise NOTAMs and to ensure that flight crews can still continue to operate.”

“The EUROCONTROL Network Manager has worked very closely with states, airports, air navigation service providers and airlines to produce a Network Recovery Plan. Currently, this estimates that we will have over 10,000 flights a day by early July, compared to just 3,500 flights a day when we were at the worst point in the crisis. The overarching aim is to ensure that as aviation restarts, the whole process can happen as smoothly, efficiently and sustainably as possible.”

“...and onboard aircraft. Where possible, this should be coordinated across Europe in order to make it understandable and provide confidence to passengers and airlines.”

“We need to ensure the industry can recover – and we also need to ensure that if there is a second wave, aviation will be allowed to continue. Of course, that will need to be done in accordance with the EASA/ECDC guidelines, and that is why we are working very closely with the European Commission, EASA and ECAC to ensure as much clarity and consistency as possible for airlines, airports and the travelling public.”

Montserrat Barriga, Director General, European Regions Airline Association (ERA)

“ERA member airlines’ figures saw a significant downturn early on, with available seats and movements showing a decline in March of -11% and -13% respectively. By April, this had increased to -73% compared to the same month last year. While EUROCONTROL has reported positive projections that show the start of traffic recovery, we will not be returning to normal operations any time soon.”

“A collaborative and coordinated approach by industry, member states and relevant stakeholders is vital to reconnect and reunite Europe by air travel. Reinstating consumer confidence to fly again is vital to our industry’s recovery process; however, proven scientific mitigations must be employed to enhance this confidence and not undermine it or give rise to heightened anxiety. In addition, all measures must be financially, operationally and logistically viable. I’m hopeful that EASA’s new guidelines will provide this much needed coordination among the industry and allow us to return to operation in a safe and aligned manner.”

“On state aid, we think that the EU Commission must only approve selective support measures for large companies if the grant of state aid does not distort competition in the internal market in line with Article 107 of the Treaty of the Functioning of the EU. We urge national governments in the EU to attach strict conditions to any selective support packages on the basis of the principles of equal opportunities and non-discrimination.”

“Equally, ERA has continued to advocate temporary relief measures to be implemented for Regulation EU261, allowing delayed refunds to passengers for up to 12 months or refundable vouchers instead of immediate cash refunds.”
Julie Lassaigne, Secretary General, European Travel Retail Confederation (ETRC)

“The Duty Free & Travel Retail (DF&TR) sector has been severely impacted by COVID-19. The imposition of travel restrictions across EU Member States and beyond has led to significant drops in passenger numbers, resulting in dramatically lower turnover for travel retailers and lost sales for suppliers operating in this channel.”

“The next challenge is resuming operations and trying to adapt to a new normal. Restart of air travel doesn’t mean recovery, and local/national authorities need to understand that further support is needed.”

“The impact of COVID-19 has been felt by all players in the air travel value chain and to efficiently restart travel and support the regrowth of European economies, all actors need to be taken into account in recovery support plans. ETRC has sent several letters, some jointly with ACI EUROPE, to EU and national authorities outlining the impact of COVID-19, ensuring the consequences of the crisis and importance of non-aeronautical revenues were understood.”

“In late-April, ETRC released Best Practice Guidelines on practical measures necessary to reopen DF&TR shops in the wake of the COVID-19 outbreak. ETRC also contributed to the EASA and ECDC Operational Guidelines for the management of air passengers and aviation personnel in relation to the COVID-19 pandemic.”

“ETRC has welcomed efforts from the European Commission and European governments to protect employment. Emergency support schemes are vital and need to be extended and apply to the different stakeholders.”

“COVID-19 should provide an opportunity to agree on ambitious strategies with medium- and long-term effects to revitalise the industry in a sustainable way.”

Fabio Gamba, Director General, Airport Services Association

“Airport services and airline catering companies are among the hardest hit by the COVID-19 crisis. These are the people who handle your baggage, board your plane and prepare the food for your trip. The safety of passengers and employees remains paramount and will always come first. We have put effective measures in place to protect the health and safety of travellers and our people. Aviation is and remains the safest way to travel.”

“We are engaging with our members. We are also explaining to governments how important ground handling is in terms of making the whole aviation value chain function properly.”

“Collaboration with other industry associations is important and we are working closely with our colleagues in ACI EUROPE and IATA. It is extremely important that we are all in agreement regarding what needs to be done as travel restrictions are lifted. We must ensure there is a common understanding of the role of ground handlers.”

“The COVID-19 crisis has shown that ground handling is so essential to operations in a safe air transport system. If nothing else, this demonstrates in Europe a need for a common standard for ground handling, which is lacking today.”
Eduardo Santander, Executive Director, European Travel Commission

“The COVID-19 outbreak and resulting lockdown measures have had a severe impact on the European tourism sector. The latest OECD forecast indicates that the implied shock could amount to a 60-80% decline in the international tourism economy in 2020. While we expect recovery in 2021, it will take a further two years at least for the world tourism economy to return to 2019 levels.”

“We have been working very closely with the European Commission and other stakeholders to mitigate the immediate effects of the crisis and pave the way towards a swift recovery. In particular, I was participating in high-level virtual meetings with EU Commissioner for Internal Market Thierry Breton, calling on the Commission to invest in brand Europe and a Europe-wide tourism campaign, promoting the force of travel to help local communities and save tourism.”

“We need to adapt to the ‘new normal’ and find smart solutions to restart travel in Europe. If the tourism businesses, which are now surviving only thanks to state aid, manage to resume their activities this summer, we might be able to get back on our feet.”

“We are pleased with the attention that the European Institutions have been dedicating to tourism. The recovery plan presented by the European Commission is a good first step. The Commission’s proposal acknowledges that tourism could see a more than 70% drop in turnover in Q2 2020 and puts the tourism ecosystem on top of the basic investment needs with €161 billion required.”

“We need a direct tourism budget line, now more than ever, to help the recovery of the sector and accelerate the transformation to sustainable, digital and innovative tourism in Europe.”

Emmanuel Mounier, Secretary General, eu travel tech

“As key contributors to the travel and tourism ecosystem, eu travel tech members (global distribution systems, online travel agencies, metasearch and travel management companies) have experienced first-hand the impact of COVID-19.”

“One of the most dire consequences was, undoubtedly, the liquidity crisis that affected all players across the air travel industry. Many of our members have seen a reduction in bookings of 60-90%, while having to cope with refund requests from travellers, creating an unsustainable cash-flow and revenue situation.”

“We need EU policymakers, Member States and industry to work together to find solutions that put travel and tourism at the centre of the recovery plans, stimulate demand and restore consumer confidence. We must work on coordination at EU level and prioritise measures and policies to help reignite the sector. Technology will play a crucial role as an enabler and accelerator of recovery.”

“A driver for recovery will be adequate competition, which is key for consumer access to choice, flexibility and value. eu travel tech members will contribute by operating transparent marketplaces where all players can compete on a level playing field. Our members have also made available a number of support measures to their partners and suppliers to ensure that the whole travel ecosystem is prepared to recover swiftly.”

“The erosion of demand has led to a predicted recovery of the sector by Q2 2021 at the earliest. The European Institutions should instigate initiatives to counter these trends, such as the implementation of time-limited income tax credit for private expenditures by national governments. The creation of EU and/or national marketing funds to support European destinations to progressively attract more visitors is also important.”
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04

06

08

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By Size - 15 - 25 million passengers per year

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COVID-19 crisis delivers concrete insights that can help aviation in sustainable recovery

An interview with Marina Bylinsky, Head of Sustainability, ACI EUROPE. By Agata Lyznik

There has been a lot of talk about sustainable, balanced, green recovery from the present crisis. Many stakeholders see COVID-19 as an opportunity for a complete reset of our economy. How could this concept play out in the aviation sector?

As we overcome the immediate COVID-19 health emergency, we can indeed take a more forward looking approach and critically assess the way we managed the present crisis, and what we can learn from it for future scenarios. Climate change is going to be a source of new crises and hence remains the greatest long-term challenge we face. As put in a recent study published by the Oxford University and co-authored by the Nobel Prize winner Joseph Stiglitz: “The climate emergency is like the COVID-19 emergency, just in slow motion and much graver.”

In the context of a sustainable recovery, this study is actually really interesting. It is based on a survey of high-level economic experts, assessing different types of recovery policies. The policy that achieved the lowest score of all referred to aviation bailouts, considering its climate impact but also economic outputs. This conclusion reveals doubts about the long-term economic viability and resilience of the aviation sector. It sends a clear warning signal to the industry, highlighting that the environmental, social and economic dimensions of sustainability are intrinsically linked, and should encourage us to “build back better”.

The good news is that the COVID-19 crisis has delivered very concrete insights that can help us in our sustainable recovery. Firstly, it has shown that we need to trust and follow the science. Goals and strategies can no longer be determined by “what we can achieve” but “what we have to achieve”. For the aviation sector, it means that we need to step up our industry-wide climate goals, and align them with the latest climate science, namely the need to reach Net Zero CO₂ emissions by 2050. Secondly, COVID-19 has shown how important early action is to address a looming crisis, and that delays do have a significant human and economic cost. The same is true for climate change. Delaying or reducing the rate at which emission reductions are made today will require more significant cuts in emissions in the future, with higher costs. For the aviation sector, this implies that we have to maintain climate action high on our agenda. Of course, in the current context, we will not be able to deliver on it on our own. This is why public support to the decarbonisation of aviation is more important today than ever. Such support will help our sector regain its economic viability – which is a prerequisite for safeguarding our ability to keep investing in decarbonisation on our own accounts, and ultimately continue providing social and economic benefits to society.
What is the role of airports in this effort?

Through ACI EUROPE’s Net Zero 2050 commitment from June 2019, European airports already aligned their climate ambition with the latest scientific evidence. Of course, for the aviation sector as a whole, the scale of the challenge is different, as we have many more solutions to decarbonise on the ground than in the air. Our role as airports is manifold: we have to first of all reach our own climate goals, but also to support the broader decarbonisation of the air transport system. This refers to facilitating more efficient ground operations, optimised air traffic management but also the provision of infrastructure and associated services for the use of Sustainable Aviation Fuels (SAF), and in the longer run, hydrogen fuelled and electrified aircraft operations. As a matter of fact, as new aircraft technologies emerge on the market, the role of airport operators will be critical to enable their deployment. For instance, if an airline is purchasing an electric airplane, it will only be able to fly it once it can be charged at the airport and benefit from associated maintenance and handling services. The “deeper” we get into the decarbonisation of air transport, the more important the role of airports will be as nodes of climate action, accelerating and removing roadblocks for new technologies and operations, in cooperation with industry partners.

Speaking about a sustainable recovery from an airport perspective, we should also not forget about its more local components, for instance mitigation of noise and air pollution or resources management. In these areas as well, we can use the recovery from COVID-19 as an opportunity to explore new, innovative approaches.

Did airports continue to unroll initiatives aimed at reducing CO₂ during the pandemic?

It is great to see that in spite of the COVID-19 crisis, airports have indeed been introducing new environmental initiatives in the past months. For instance, Schiphol Airport launched a trial of Taxibot, an electric tow vehicle that allows aircraft not to burn fuel while taxiing – reducing not only CO₂ but also local air pollutant emissions. Copenhagen Airport partnered with several other Danish companies to develop green hydrogen and synthetic fuels. 10 airports, amongst them 6 in Europe, have entered Airport Carbon Accreditation since 11 March, when the WHO declared...
COVID-19 a pandemic. In fact it’s actually in this difficult period that the programme hit the milestone of 300 accredited airports worldwide, as we have 309 of them now.

**How can ACI EUROPE influence the situation positively? Has there been any adjustment in its position triggered by the crisis?**

I see several roles for ACI EUROPE in this situation. Firstly, we have to facilitate the continuity of airport climate action. This involves awareness-raising within the membership, advocacy and practical steps to ensure the supporting tools we provide remain fit-for purpose in a new environment.

Awareness-raising is one of the areas we have worked on under the Off the Ground project, concluding that in addition to being a moral obligation, climate action will be key to rebuild public trust in aviation, achieve operational efficiencies, and also secure access to public and private investment. We also see an increasing number of policy but also investor initiatives to better understand how sustainable different assets are and direct investments accordingly. In spite of the massive shake up of our industry and the uncertainty about what the landscape will look like one year from now, continued climate action does thus make business sense.

As regards advocacy, ACI EUROPE plays an important role in exploring opportunities for public funding to support airport decarbonisation during the recovery. It is essential that the implementation of the European Green Deal and related national policies are pursued as per initial plan, so as to provide airports and other stakeholders with a stable reference in which to develop their climate action. Furthermore, it is critical to ensure that there is consistency between climate policy and other policy areas. For instance, the process of economic regulation of airports should take into account the need for airports to be permitted and encouraged to make timely investment in decarbonisation.

In terms of supporting tools, we have implemented temporary adjustments to the rules of Airport Carbon Accreditation to help our members maintain their participation in the programme. Amongst others, these changes allow airports to benefit from a one year extension of their certification, a streamlined verification process and thus reduced overall costs of accreditation.

More broadly, we are also going to analyse how far COVID-19 requires us to rethink airport sustainability across its three dimensions. Aviation has proven to be an indispensable connector in the present crisis, ensuring the flow of essential goods, medical equipment and facilitating rescue missions. More than ever aviation’s positive contribution to the regions it serves has come to the fore. We believe this is an opportunity to explore how we can build on this experience to foster our relationship with local communities during the recovery and beyond.

**In your opinion, what is the most important measure in addressing emissions from aviation operations?**

There is currently no silver-bullet solution to the CO₂ emissions from air transport, so a combination of different measures need to be implemented. We usually refer to these as the ICAO “Basket of Measures”, consisting of technology improvements, more efficient operations, SAF and market-based measures, such as the EU Emissions Trading System (ETS) or the ICAO Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA). Various studies are currently being carried out to assess the potential of each of these pillars, and to inform policy-making accordingly. From our perspective, we see that SAF is clearly one of the most significant. The advantage of SAF is that their use does not require changes to existing aircraft engines, nor significant modifications of airport infrastructure. Their operational roll-out can thus be achieved in a much shorter timeframe than, for instance, the entry into service of electric aircraft. The major obstacle to a wide deployment of SAF has so far been a limited production capacity, with a several times higher cost of SAF compared to fossil jet fuel. As such, ACI EUROPE welcomes the decision of the European Commission to develop a dedicated policy framework for SAF through its ReFuelEU Aviation initiative, aiming to scale up production and market uptake of SAF in Europe. We believe that in the context of an economic crisis, this work will be even more important; in addition to decarbonisation benefits, it will also help create jobs.

**And what would be the gamechanger for airports in this regard?**

Emissions under the airport operator control typically refer to heating and cooling of buildings, ground vehicles and support equipment, on-site processes such as waste processing and most importantly, electricity. The latter on average accounts for roughly 60% of the airport operators’ emissions. From that perspective, access to clean electricity is absolutely key for airport decarbonisation, and is all the more important as it can be used to replace the use of fossil fuel in vehicles or buildings. To access clean electricity, airports can either procure it, or generate it on-site. On-site generation is particularly relevant, as it is 100% additional, i.e. creating new green electricity generation capacity and thus substituting conventional electricity.

Furthermore, from a business resilience perspective, it is also interesting as it helps make an airport operator less vulnerable to disruptions in supply chains which can affect the national electricity grid. Of course, there are also challenges, for instance at the technical level where energy storage needs to be further developed if an airport wishes to produce large volumes of electricity which are not immediately consumed or fed into the grid. We therefore welcome the plans of the European Commission to accelerate the clean energy transition across Europe in the context of a sustainable recovery, as it will be an important enabler for continued airport decarbonisation.

1. https://www.smithschool.ox.ac.uk/publications/wpapers/workingpaper20-02.pdf, p. 4
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Good and bad drones: is your airport ready?

Drones increasingly fly over our skies, posing risks and challenges to the aviation sector. Airports are learning how they can best manage drones in the airport environment while keeping the required levels of safety and security. Recognising the need to provide airports with recommendations and guidelines on drone operations, ACI EUROPE has published Drones in the Airport Environment – Concept of Operations & Industry Guidance. Report by Eugene Leeman

The ACI EUROPE Drone Task Force, made up of our representatives alongside airport experts drawn from a variety of backgrounds, first met in April 2019. Our primary goal was to exchange information and to see how ACI EUROPE could provide guidance on how drone operations could be facilitated, whilst ensuring the necessary safety and security levels at airports.

It was agreed that one area of focus should be the development of a Concept of Operations (ConOps) and Industry Guidance to inform ACI EUROPE’s member airports, based on today’s insights.

Since drones encompass various domains, ACI EUROPE actively looked for collaboration with some key aviation partners, like EUROCONTROL, EASA and EUROCAE.

The key objective of the ACI EUROPE ConOps, entitled Drones in the Airport Environment – Concept of Operations & Industry Guidance, is to provide information and guidance to the airport community (airport operators, air traffic control, surveillance units, drone operators etc.) on how they can best manage good and bad (unauthorised) drones. It also gives more clarity and advice to regulation and standardisation bodies like the European Commission, EASA, civil aviation authorities (CAAs) and EUROCAE. The recommendations that ACI EUROPE gives are both for regulators and for the airport community.

Although the ACI EUROPE ConOps is a first version and work is already in place to prepare another edition, special attention was given to the structure of the document so as to make it easy to understand and use. The document is divided in two parts: the main content and the annexes. In the main body of the text, airports can find information about the roles and responsibilities, airport environment, operational concept, safety and security as well as coordination and communication arrangements. The annexes contain reference material about regulations, operational characteristics, approval...
process, risk assessment, workflow/checklist examples and a list of standardised Use Cases. Also included is a glossary and list of abbreviations alongside reference documents and useful links.

If your airport wants to get quick information, looking at the ‘recommendation boxes’ is a good start. Some tips to follow:

• Get the Roles & Responsibilities sorted out as early as possible. Actors need to know who does what and the dos and don’ts - for good and bad drones
• Ensure that your airport develops a clear picture of how the airport environment needs to be protected against unauthorised drones and to facilitate the good drones if you have such plans
• Keep a holistic view on safety and security and ensure that drones are fully integrated in the safety and security programmes
• Perform risk and threat assessments and develop “what if” scenarios. Don’t forget to look at business continuity and reputation risks too
• Ensure that your airport gets the incident reporting well organised in order to maintain a realistic perspective of safety and security risks and to improve the system – the lessons learned. Start collecting data.
• Set up a training programme for your staff and act accordingly
• Give special attention to coordination and communication arrangements. This is crucial in normal and abnormal situations and should be a priority in the training programme
• Develop and provide clear checklists/flowcharts for operational managers. Quick reaction procedures need to be developed to allow key players to respond in the most appropriate manner. Wrong decisions or wasting time may have a serious negative impact and must be avoided where possible.

Our goal is for the ConOps to become the recognised reference material for drone operations in the airport environment and that multiple stakeholders will make the best use of it. ACI EUROPE also hopes that the principles of operating with drones in the airport environment described in the ConOps will inspire Regulators and Competent Authorities to embrace the ideas and recommendations and to work together with all stakeholders, including standardisation bodies, to develop technical and operational standards across Europe. This is the first step in developing a concept of how to handle good and bad drones at and around Europe’s airports. ACI EUROPE recognises that we’re all still in a learning phase; more work will be done not only to continue to support airports, and to keep abreast of the rapidly evolving drone market.

ACI EUROPE invites airports that have already held trials or workshops on using drones for aircraft inspections, inspections of buildings, airport construction works or wildlife management and alike to share information and best practices. We also intend to launch a survey to improve understanding of drones in the near future.

If your airport wants to provide input and share experience on drone operations, please contact eugene.leeman@aci-europe.org

ACI EUROPE’s Drones in the Airport Environment – Concept of Operations & Industry Guidance is available in electronic format from this download link: https://www.aci-europe.org/component/attachments/attachments.html?id=964

Eugene Leeman is ACI EUROPE’s Liaison Officer to EUROCONTROL.
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Operational breakage, technical failures, growing legislative demands, human error, as the list of challenges facing the operational rigor of airports across the globe grows larger, what does this mean for the future of core airport functions that drive the daily routines?

The Future of Airport Productivity

At this very moment in time, airports around the world are facing excruciating challenges in highly intense times for the aviation and logistics sectors.

Population growth across the globe as well as the enhanced diversity of consumer trends has resulted in more people travelling internationally than ever before, with a further 35% increase expected by 2025. These behavioural changes create new challenges, adding to the demand on aviation operators.

Examples of consumer driven change include the likes of Airbnb, contributing to a more attractive and accessible travel solution for those on a budget, and with an increased population looking to fly quicker and cheaper, airport operators are being squeezed with reduced profits and demand for a better, quicker and a more secure service.

With the evolution of technology, solutions to these problems; from threatened profits, increase in demand and the need for additional investment in operational infrastructure, are key to future-proofing operational rigor and the subsequent consumer experience. Alleviating these challenges could be the answer to not only sustaining, but enhancing airport performance, accelerating efficiency, safety and productivity.

Today, the need to implement and align technological advances into operational infrastructure to maximise airport output is greater than ever before. Technology has sat at the heart of, and revolutionised consumer experiences for the past 30 years, however, as airlines and the infrastructure that serve them become increasingly reliant on technology, vulnerabilities become clearer and minor technical failures can cause catastrophic outcomes.

Insufficient investment in technology infrastructure over the past decade has resulted in a spate of technical outages that have crippled an airline’s operations for days on end. Over the past couple of years, airlines have experienced major disruptions caused by anything from electrical fires to security breaches, faulty equipment and more.

What can be done to help future-proof airport productivity?

Create a smarter airport. Picture this; every single piece of mechanical hardware monitored for faults before they become faulty. Every room monitored for the slightest temperature changes to report real-time fire risks. Every electrical and mechanical item fixed before they become broken. All without a single wire in sight.

Advancements in technology now means that airports can retrieve second by second data through the application of Cyber Physical Systems. The advent of such technology has begun to revolutionise airports and distribution facilities, with the addition of a new product innovation in the form of remote wireless monitoring.

The remote wireless monitoring of electromechanical equipment across the airport engineering infrastructure and associated facilities can be used to monitor any part of an airport, including shops, passenger flows and enable early warning signs of failures to processes and equipment.

With real-time reporting and the ability to centralise data on cloud-based servers, information can be accessed, assets monitored, and issues raised from anywhere at any time, avoiding lengthy delays in solving infrastructure failures, and most importantly, highlighting these issues ahead of breakage.

With over 70 different types of sensors on the market, the monitoring possibilities are endless. Live monitoring will help airports reduce maintenance cycles with real-time data feeds to custom built dashboards informing risk managers, engineers and senior team members of any impending failures.

Furthermore, Artificial Intelligence (AI) now allows systems to pick up trends within specific assets, learning from past data to understand estimated breakage points and peak fluctuation times, providing a greater window of opportunity for corrective action.

Importantly, technologies such as these provide transparency from the ground-up, supplying the relevant information to the right people, across any device, as and when needed. This means that engineers receive immediate data on concerned assets ultimately leading to greater efficiencies and up-time of any and all monitored hardware.

What next?

The implementation of intelligent technologies has for a long time been the differentiator between failure and success for large operations, and as artificial intelligence technologies grow smarter with the rate of technological advancement, the next decade will prove to be the most exciting yet.

The future of aviation, logistics and all supporting operations is well and truly in the hands of those open to change, open to implementing smart technologies and subsequently creating a data driven, technologically focused, intelligent business of the future.

Think about the changes you can implement today to enhance the way you work tomorrow. Maintain that mindset, implement change and today’s operation will be tomorrow’s success.

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The new mandatory ATM investments for Europe’s airspace modernisation in the wake of COVID-19

The European Commission (EC) wants to take ATM modernisation forward with a new package of mandatory investment in ATM that also targets airports. The current EC thinking is that this new mandatory investment needs very stringent investment timelines, reduced public funding and an enforcement system based on penalties. Luc Laveyne and Barbora Smolikova report.

The pace of aviation and Air Traffic Management (ATM) modernisation will not immediately match pre COVID-19 levels. Airport operators and airlines, which have to earn their own revenues, will have huge difficulties in restoring investment capability, both in terms of finances and human resources. After the SARS crisis in 2003, airports needed up to 4 years to recover.

The COVID-19 pandemic has had an unprecedented impact on the global economy, including one of its key industries: aviation. From very few aircraft flying over the skies to nearly entire fleets grounded, the aviation operational stakeholders found themselves incurring high fixed costs and very limited or no revenue at all. Over time it has become clearer that the magnitude of the COVID-19 impact will be devastating for the entire aviation sector with much uncertainty ahead. If only a few months ago the focus was on the necessary investments in ATM modernisation, today it is more about “surviving” and being able to deliver daily operations linked to core businesses.

The question here is no longer about how or when, but more about whether or not airport operators will be able to restore their respective investment capabilities, to comply with the mandatory investment needs (European Commission Regulation, Pilot Common Project implementation which aims at Single European Sky modernisation).

The recent announcements of cost cutting and reduced fleet size by major airlines will undoubtedly have an additional impact on the investment possibilities of nearly all airports. Today, experts foresee a long U-shaped recovery, perhaps even followed by a longer than expected period of very low activity. Airports are fully dependent on their infrastructures. The fixed costs and the loans associated with very long-term investments remain, even when revenues are non-existent. The business response to this unprecedented situation is similar to that of airlines: put all investments on hold, try to control staff costs as much as possible through temporary unemployment schemes or laying off personnel to keep the business afloat.

In this complex context, ACI EUROPE’s SESAR Related Deployment Airport Grouping (SDAG) stands by airport operators to provide the necessary support to preserve what has been already invested (since 2014 nearly 85% of deployment implementation has been either completed or was in progress before the COVID-19 pandemic) and to make sure that airport operators are compliant with the EU Regulation to keep bringing added value to their passengers.

ATM investments by airport operators, certainly on the mainland, is mainly investment which benefits either airlines or the entire network. Conversely the business case for airport operators is mostly very negative and direct benefits, which are translated in concrete revenue, are difficult to demonstrate. It is mostly about indirect benefits through less disfunction in the ATM system.

Airport operators in Europe have always stressed the need for ATM modernisation – an ATM system to serve the passenger. Photo: Fraport AG
SDAG works closely with airport operators to make sure that a realistic post-crisis SESAR deployment recovery plan is developed. In this respect and based on the willingness to contribute to Europe’s ATM modernisation that has to be aligned with the current situation, SDAG has produced a Position Paper on the new Common Project 1 (CP1) requirements, which identify a set of SESAR mature solutions that are mandatory to be deployed in a synchronised way. SDAG’s position is built on the following three main pillars:

- breathing space during the recovery period to find the necessary money and staff to complete the implementation projects
- legal certainty that the timeframes offered in CP1 are realistic, the technology is mature enough, the procurement can be done in a non-monopolistic market and that any potential financial enforcement mechanism is workable and proportionate
- for the sake of further take-up of SESAR procedures and technology, solid financial support can be provided in form of:
  - ad hoc aid to inject a relief to the airports that could speed up their restart plans and that want to hire back staff with relevant know-how
  - public funding for investments where the investor has no sufficient direct return on investment.

A novelty in the new EC package of mandatory requirements is the proposed enforcement scheme based on penalties. Currently, SDAG cannot agree with the proposed concept of enforcement due to a combination of factors that have to be considered. These include the COVID-19 recovery period, the lack of legal certainty that a non-monopolistic market will be available at the industrialisation target date, the fact that an important part of the investment will have to be done in cooperation with the local ATC and the fact that the enforcement mechanism is built on a nearly pure air navigation service provider (ANSP) concept.

SDAG advocates that the enforcement mechanism, if any, should not create any legal uncertainty and should be limited to those areas where there is no obligation to jointly invest. Member States should designate the most appropriate organisation according to the roles and responsibilities and, concerning airport operators, they could use existing frameworks to ensure timely compliance with the Regulation. Another possibility to mitigate non-compliance at the end date is the use of the legal settlement between the airport operator and the national regulator. Any enforcement mechanism should also contain a link with the monitoring exercise as well as an appeal procedure. SDAG noted that the EC decoupled the Implementing Regulation from the financial support. However, it is important to underline that airport operators would have never been able to enter the SESAR deployment so massively without the financial support from the Connecting Europe Facility (CEF) Transport Calls. As long as there is mandatory deployment for stakeholders with less concrete outcomes, the logic is that the EC financially provides support with public funding. This is the case for AOP and SWIM investments by airport operators.

Without local investment in AOP, there is no benefit possible for the network. All communications between the Airport Operations Centre (AOC) and the Network Manager Operations Centre (NMOC) or between APOCs should in principle be considered as cross-border investment projects. The same understanding applies to SWIM: there is no benefit possible for the network without local investment in SWIM. This is in line with what the Innovation and Networks Executive Agency (INEA) promotes as priority actions.

In order to make sure that the aviation industry can continue delivering the SESAR technology through automation, digitalisation, enhanced throughput and safety, SDAG believes that two key elements have to be considered while designing and implementing relevant mitigation measures. More specifically, aviation needs financial support with a twofold aim: restarting the SESAR Deployment Programme as soon as possible and bringing back the valuable human resources that are currently either on furlough or even unemployed. The second key element is the need for the European Commission Implementing Regulation (IR) 716/2014 to provide a stable and realistic legal basis. It is crucial that the ongoing PCP revision takes the COVID-19 impact into account and that the deadlines of all PCP ATM areas are postponed by at least 24 months. In addition, the revised PCP Regulation should also envisage the postponement of end date of new functionalities.

Even though there are many uncertainties about the magnitude of the COVID-19 crisis and about the mitigation measures that will be put in place, SDAG will keep cooperating closely both with the stakeholders and the European Commission in order to identify the most appropriate measures that will facilitate the continuity of investments in ATM modernisation.

Europe’s ATM modernisation is perceived as an essential step to achieve the Single European Sky goals. You can visit the SDAG website: https://www.aci-europe.org/aci-europe-airport-grouping.html

Luc Laveyne is Managing Director, ACI EUROPE’s SESAR Related Deployment Airport Grouping (SDAG).

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How can innovation help airports in a post-COVID world? That is the question that members and partners in the SESAR Joint Undertaking (SESAR JU) are investigating. They are looking at solutions in the SESAR research and innovation pipeline that could help airports adapt their operations to the new normal, as well as technologies that could build resilience, especially among hard hit small to medium airports. Florian Guillermet, Executive Director of the SESAR JU, has the story.

From medical screening and checks to physical distancing requirements, airports are already putting in place a whole host of measures to ensure the health and safety of passengers and staff in what is expected to become the new norm in air travel for the foreseeable future. These requirements will have a massive impact on passenger flow, terminal capacity, transfer times and the overall duration of a journey. They will therefore demand even greater collaboration between the different airport stakeholders, from the airlines, ground handlers and air traffic control to security, emergency services and airport management.

Rather than reinventing the wheel, there are already solutions out there that can help with this adaptation and ensure that these new requirements are integrated into the overall management of airport operations. As part of its Total Airport Management project, the SESAR JU has developed a series of tools to better integrate airside and landside performance monitoring processes, which can be adapted to any airport setting.

Some airports have already set up operations centres or APOCs to manage these processes collaboratively. In them, stakeholders are offered a shared view of flight prioritisation, runway traffic loads and turn-around times of aircraft, as well as baggage and passenger operations and more generally the status of the overall airport operations. Through real-time monitoring and with the help of automation and decision support tools, the airport can anticipate disruptions allowing airports’ stakeholders to take corrective actions, enabling better synchronisation between these operations and improved predictability.

With our airport partners, we are looking at how APOCs and their performance monitoring and management could be extended to sanitary and physical distancing measures in order to manage their impact on passenger, security, stand allocation and turnaround processes, as well as the predicted time in which all the ground-handling activities will be completed. It would also lead to the development of indicators and alerts within the airport operations plan and APOCs to deal with the status of sanitary checks, providing airports with predictability and the required agility to regularly adapt their measures and processes to changing constraints (such as a second wave of outbreaks). Some possible adaptations could also include the installation of cameras on the ground, as well as the use of video analytics and artificial intelligence to handle all the data generated by the checks.

With COVID, there is clearly an increasing need for airports to monitor and manage the impact of landside activities on airside operations. That is especially true for smaller airports, whose landside or terminal capacity will be significantly impacted as a result of the sanitary and physical distancing measures that will be put in place. In this context, SESAR members are looking at how the services delivered by the APOC can be made more affordable for regional airports in Europe, by
moving from cost-intensive databases to services delivered through the cloud. Another cost saving could be made through the simplification of collaborative decision making for these airports, focusing only on essential milestones. Big data and artificial intelligence could also help, for example by allowing the automation of target-off block and target start-up time calculations.

Smaller airports are particularly vulnerable now and will need to build their resilience at an affordable price in the long term. Given the social and economic importance of these smaller airports for their surrounding communities, it will be critical to have strategies to ensure their sustainability. Innovation has a role to play, which we are demonstrating with our research portfolio of solutions, many of which are already available for implementation, providing airports with the means to improve accessibility and increase their resilience at a fraction of the cost.

Take satellite-based navigation technologies such as the GBAS Category II/III solution, which enables enhanced arrival procedures at much lower maintenance costs compared to traditional navigation means. Meanwhile, enhanced terminal operations with required navigation performance (RNP) transitions are particularly relevant for airports with geographical constraints to ensure accessibility. We are also developing low-cost advanced surface surveillance solutions based on cameras and ADS-B, as well as surface safety nets for airports that do not have an A-SMGCS installation. Added to that are the advances that we have made on enhanced vision systems for aircraft, which require minimum changes to the existing air traffic control procedures and no investment in new ground systems. Remote tower service provision is also a proven means to increase cost efficiency of smaller aerodromes that are often connecting the most remote parts of Europe, providing them with an economic timeline.

Understandably, the focus of airports is on the here and now; as States look at lifting travel restrictions so that air connectivity can be gradually restored, airports are putting in place measures to ensure the safest and healthiest passenger experience possible. Technology and innovation will be key in this process since it will help airports adapt to the new travel etiquette, building confidence among the travelling public, while preserving capacity and maintaining efficient operations.

Remote tower service provision is also a proven means to increase cost efficiency of smaller aerodromes that are often connecting the most remote parts of Europe, providing them with an economic timeline.

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EASA’s initiatives and guidelines play an instrumental role in restoring health-safe air travel in Europe after the COVID-19 lockdown

As I live close to Cologne-Bonn Airport (CGN), my “home office” window offers a good view on the approach path to RWY25, and from time to time I see the silhouettes of transport aeroplanes. Several times a day I hear the reassuring sound of jet engines as the “heavies” climb out in a left hand turn, bound for transatlantic destinations. For the casual observer, aviation is still in business: but only because CGN is home to several express companies, perhaps the only sector to emerge relatively unscathed from this crisis. For most, the situation is dire, with some 25,000 flights missing from the European skies every day in April and May 2020. “Unprecedented crisis” is a fitting description.

EASA was quick to identify the threat posed by COVID-19 and issue a Safety Information Bulletin (SIB) with measures to protect passengers and front-line personnel. As the outbreak intensified, mandatory actions were specified, requiring enhanced aircraft disinfection and carriage of protective equipment. EASA issued detailed guidance on crew management. As Europe and other parts of the world started to shut down, EASA focused on ensuring business continuity and enabling aviation to fight the pandemic.

EASA published guidance on the safe transport of cargo in passenger aeroplanes and on the issuance of exemptions from fatigue regulations, so that flights could serve states where crew accommodation was no longer available due to quarantine measures. Many other similar actions were taken, addressing training and checking of personnel, aircraft storage, installation of isolating partitions and helicopter medical services. Even in these extenuating circumstances aviation played its part, bringing in vital medical supplies or repatriating Europeans stranded in other parts of the world.

Whilst the pandemic is still far from over, the situation in Europe shows signs of normalisation, and commercial aviation is taking off again. In preparation, EASA launched Project RNO (Return to Normal Operations), bringing together representatives from most prominent industry associations including ACI EUROPE, personnel associations and Member States. The most pressing need was the lifting of travel restrictions. Aviation is the business of connectivity and is intrinsically cross-border. A coordinated approach for public health measures in aviation was seen as the catalyst of a swift recovery, as a disharmonised situation would create difficulties for passengers and airlines and undermine public trust. EASA therefore partnered with its sister Agency, ECDC (European Centre for Disease Prevention and Control) to develop the COVID-19 Aviation Health Safety Protocol, a set of Guidelines for the management of air passengers and aviation personnel, both in the airport and on board of the aircraft. The focus now is to ensure their proper implementation both within Europe and beyond.

Getting aviation back in business requires a joint and coordinated effort from the entire sector. The recovery will not succeed if safety needs are neglected, and this is the underlying leitmotiv of Project RNO. EASA will focus on ensuring that aviation personnel are trained to the highest competence standards and that aircraft are airworthy (with special emphasis on their storage and subsequent return to service).

Aviation built its safety record by excelling at identifying and managing risk. This competence will need to be reinforced, so that SMSs across the sector will be robust, resilient and particularly adept at identifying emerging risks generated by the COVID-19 crisis. This particular topic is a specific focus area within Project RNO. EASA is also designing tools and models that should help the sector to better control epidemiological risk. We should indeed not let a good crisis go to waste but rather make use of it, to make sure we will be better prepared in future.

This crisis is shared by everybody (in aviation) and EASA is committed to doing its part to resolve it.

Report by Eduard Ciofu

Eduard Ciofu is Air Operations Standards Section Manager, EASA.

During the COVID-19 crisis, EASA has worked to address aviation stakeholders’ needs as efficiently as possible. It has provided the aviation industry with guidance on the measures necessary to implement the safe resumption of operations. The COVID-19 Aviation Health Safety Protocol, jointly developed by EASA and the European Centre for Disease Prevention and Control (ECDC), has become the industry reference for a coordinated approach to restoring air travel.

Report by Eduard Ciofu
Join 400 representatives from airports, travel retail operators, brands and other business partners focused on non-aeronautical revenues in the capital of the Netherlands.

The ACI EUROPE Airport Commercial & Retail Conference & Exhibition is established as the meeting place for all who are focused on delivering non-aeronautical revenue success. Each year, the event is attended by senior airport commercial executives, operators and brands, as well as their business partners from retail, food & beverage, travel services, media and other enterprises from around the world.

The event will consist of a two-day working agenda, as well as bringing together 400+ airports, travel retail operators, brands and solution providers for an exhibition and networking social programme. The ACI EUROPE Commercial Forum, the internal working group focusing on the development of non-aeronautical revenue, will meet within the framework of this flagship event.

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What the future for airport economic regulation should look like

The impact of COVID-19 on airport pricing makes it imperative for EU regulators to adapt the regulatory framework in order to enable the recovery of airports and the entire aviation sector. Jonathan Sandbach reports.

The economic regulation of airports, already under review by the European Commission prior to the COVID-19 pandemic, has taken on a new urgency and focus. As aviation emerges from the pandemic the competitive landscape in which airports operate will have changed dramatically. Airport capacity is likely to be underutilised for some time and airports will need to compete to attract the return of airline fleets and routes. As industry bodies have recognised, the way airport charge controls (where applied) are set will be critical to the industry’s ability to recover.

The existing approach of matching costs and revenues for regulated airports is not capable of responding to the catastrophic loss of passenger traffic and revenue generation suffered by airports, airlines and service providers alike. This article considers how airport charge controls, if still necessary, will need to evolve alongside the myriad of other operational challenges faced by airports in order to promote recovery of traffic and to provide incentives for investors to support the ongoing use and development of the infrastructure.

Flexibility

The first principle which should be considered is flexibility. Airports should develop charging strategies that will incentivise airlines to utilise airport capacity. This will help to bring back lost traffic and bring down average costs per passenger across all airlines. Applying the same charges to all airlines will not achieve this objective.

By historical consensus, leisure is the most price-sensitive form of aviation traffic, followed by visiting friends and family, with business the most insensitive despite being possibly the slowest to return after the pandemic. Assuming this continues to hold as lockdown measures begin to be eased, lower airport charges for leisure passengers will benefit both airports and airlines by allowing growth in the most price-sensitive segment of the market. Whilst it is not feasible to directly vary airport charges by these segments, these segments do correlate with different airline types (e.g. more leisure travel is on low cost carriers, and more business travel is on full service carriers). Allowing airports flexibility to negotiate individual airline deals, albeit within a framework of an overall cap on average charges per passenger, enables these passenger attributes to be reflected in airport charges, as well as taking account of the ability of the airline to bring back routes and passengers to the airport.

Flexible pricing across airlines will benefit consumers by allowing airlines to reach price-sensitive segments of the market for whom otherwise air travel would be unaffordable.

Profiling airport charges

There is no question that airlines face a major cashflow challenge in the face of the pandemic. Government financial support in many countries and lower fuel charges will help in some cases. Lower
airport charges, at least for a period, may also have a role to play.

One challenge will be to reduce the impact of airport charges on airlines without damaging the ability of airports to cover costs and finance investment. Figure 1 (above) shows how this can be done by deferring aeronautical revenues:

- Whilst average costs per passenger will inevitably rise given reduced volumes, airport charges could potentially be deferred in the immediate years after the crisis, potentially allowing prices to be held below cost-recovery levels in the short to medium term;
- Deferred revenues can be recovered over a period of years and at an interest rate to be determined or negotiated. This could be done through the Regulated Asset Base (or RAB) where airports are regulated in this way.

This deferral mechanism has some positive features - lower airport charges will encourage airlines to re-enter the market quickly where routes are permitted. Investors, through the RAB mechanism, will retain confidence to invest. A particular case of revenue deferral occurs if the method used to calculate depreciation changes from a fixed proportion of an asset’s cost (e.g. traditional straight-line depreciation) to one based on a per passenger unit. This will have the effect of deferring depreciation, and hence revenue recovery, from the period of low passenger volumes to when passenger volumes return. Similar approaches have been applied in other industries, such as telecoms.

Understanding future traffic risk

Passenger forecasts are one of the most important inputs for airport charge regulation, and uncertainties around passenger volumes are the greatest source of risk for an airport. Passenger forecast contingency margins can be built into forecasts based on the “average shock” over a 10-15 year period (as in Heathrow’s Q6 2014-2019 charge control). The COVID-19 pandemic will have a very material impact on these risks. A view will need to be taken on the likelihood of an analogous incident in future regulatory cycles.

Understanding future investment risk

The impact of the COVID-19 pandemic is that many airports will have spare capacity for a period of time. Where airports compete to win routes, the resulting charges may fail to provide a full return on sunk investment even under the RAB framework proposed above unless an appropriate cost of capital is applied. It is inevitable that the cost of capital will rise as investors perceive a greater risk of asset write-down and under-recovery of costs in future. This may already be apparent from the movement in stock prices for Europe’s largest airports. Figure 2 (below) shows the “Beta” (a measure of non-diversifiable risk) of three major European airport groups, indicating how risk perceived by equity investors has risen since February 2020.

Regulators will need to consider how the current pandemic will affect expected investor returns for future airport investment (the cost of capital) whenever they assess the level of airport charges and costs in future regulatory cycles.

Final comment

Adapting the regulatory framework to the post COVID-19 aviation market will be important for the recovery of the aviation sector. This article has identified several elements which airports, regulators and airlines need to explore.
The annual meeting for air transport chief executives and industry leaders

Hosted by Genève Aéroport on the year of their 100th anniversary the ACI EUROPE Annual Assembly & Congress will once again gather senior leaders of the aviation industry. The new later date in October will allow the airport community, including C-suite airport leaders, business partners and Institutional stakeholders to gather as one and unite, to take stock and address the new reality as we shape our industry moving forwards.

Hear from airport leaders and CEO-level speakers, discussing the critical political and market issues in the aviation industry as well as panel discussions and case studies covering key airport issues.

“"We are currently facing unexpected dramatic conditions, and I know that we are all struggling to keep our industry alive. My first thoughts go to the staff which continue to operate our platform on a day to day basis, as well as to the teams that work for the success of aviation on the ground. It will take time before our industry will be able to recover properly. Together we are stronger and therefore I would like to invite you to meet in October to exchange experiences related to the current situation, to pave the road towards a recovery from this crisis and the long-term sustainable development of airports.”

André Schneider, CEO, Genève Aéroport

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At the end of June, Angela Gittens steps down after 12 years as Director General of ACI World. Here, she shares some thoughts about her time in the role and the evolution of the airports industry with Ross Falconer.

A farewell interview with ACI World Director General Angela Gittens

At the end of June, Angela Gittens steps down after 12 years as Director General of ACI World. Here, she shares some thoughts about her time in the role and the evolution of the airports industry with Ross Falconer.
international corporations and the coming 1996 Olympic Games. “So, in addition to its historical role of a connecting domestic airport for Eastern and Delta Airlines, the airport now needed to be configured for origin-and-destination traffic and for international traffic,” Gittens explains.

Then Miami, which had long been a major international hub, had to contend with competition from other airports for origin-and-destination traffic in South Florida and for international connecting traffic, particularly the Latin American market, from other airports in the US.

“As well, I was in Miami on 9/11 which of course upended the industry in many ways, with Miami Airport being heavily impacted due to its international market which constituted about half of its traffic.”

These experiences, naturally, informed Gittens’ approach to her role as ACI World Director General. As the airport industry’s trade association, ACI needs to anticipate the drivers of change and help airport management prepare for those changes. “Obviously, the situation we now have calls upon ACI to assist its members more than ever, to survive through the immediate crisis and to anticipate the changes that will come in the post-COVID-19 era.”

As airports and the entire aviation ecosystem face the challenges of COVID-19, ACI continues to be led by its members’ needs. “World and Regions are advocating for relief for airports, developing guidance to help airports survive and recover from the global crisis, and participating with regional and global industry partners and policy-makers to gain coordinated measures for restart and recovery of operations,” Gittens explains.

**ACI World and Regions working complementarily**

Gittens notes that a real highlight of her tenure has been the way ACI’s World and Regional Offices have worked complementarily to advance the interests of their members and help them raise the performance levels of their operations. “We all have engaged Boards, members, and highly talented and motivated staff, which is really showing as they are working effectively and managing to exceed their traditional missions during the very difficult circumstances in which we find ourselves today.”

She identifies two key milestones for ACI World. Firstly, the relocation to Montréal in 2011. “The physical proximity with ICAO helped them learn more about the needs of airports and helped ACI learn more about the needs of regulators,” says Gittens. “The result has been more policy decisions that have increased the benefit of aviation to the world’s communities, while allowing airports to be more efficient, customer-centric and sustainable.”

The second milestone was the launch of the Airport Excellence (APEX) in Safety programme, which solidified ACI’s status as a respected solution provider and the airports sector as one that promotes high standards of performance. “Not only did the programme help our members, but it also helped ICAO and regulators achieve their goals of raising safety performance worldwide,” Gittens explains. “This was followed by APEX in Security, which was developed at the request of both members and regulators and will likely reach into other important airport disciplines. APEX in Environment was being piloted before the shutdowns in reaction to the COVID-19 pandemic.”

**Strong leadership and engaged membership**

Discussing her experiences as a female airport leader, Gittens says the modern airport is well-suited for what may be considered female traits, including interpersonal management, finding the common denominator, and the ability to understand where someone is coming from. “We cannot continue to ignore half of the world’s population as we compete with other industries for the talent we will need to continue to play our role as an economic driver,” Gittens comments. “We need to attract more women into the business, support their professional development and ensure they get the promotional opportunities to gain leadership positions. Young women are not going to be attracted to careers where they don’t see other women getting opportunities.”

Gittens’ successor as ACI World Director General is Luis Felipe de Oliveira, who was previously Executive Director and CEO of the Latin American and Caribbean Air Transport Association (ALTA).

“What I told him is that you really need to pay attention to the fact that this is a federated organisation,” she says. “World is the headquarters – it is one of six ACI entities and each Region has different characteristics and business models, based on the nature of the policy structure within their region. We are blessed to have strong leadership and an engaged membership in each Region.”

As Gittens approaches her retirement from ACI World, she is looking forward to staying in the industry in a part-time and low-profile capacity. “After the immediate public health crisis has passed, I look forward to saying a proper farewell to my colleagues. This has been such a rewarding and enjoyable experience for me. I just regret to leave it at such a sad and difficult time.”
The new European Entry-Exit System is the cornerstone of the protection of Europe’s borders and will meet the identification needs of Schengen Member States when implemented by 2022.

“It aims at fighting against irregular immigration and trans-border crime,” begins Emmanuel Wang, VP Border and Passenger Flow Facilitation, IDEMIA. “The new system notably includes the biometric verification and identification of third-country nationals, based on facial image and four fingerprints, at all kinds of border crossing points – air, land and sea – through a shared Biometric Matching System (sBMS).”

The sBMS is a central system hosted by the European agency, eu-LISA, and IDEMIA was recently chosen to implement it with its partner Sopra Steria. The sBMS will be one of the largest biometric systems in the world, integrating a database of over 400 million third-country nationals with their fingerprints and facial images.

“As a contributor to the Smart Borders Initiative from the first discussions with the European Commission, we are very excited to shape the outcome of this major project,” says Wang. “IDEMIA has a comprehensive understanding of the current European systems and will bring best-in-class biometric technology to contribute to one of the most challenging large-scale biometric databases in the world in terms of accuracy and response time.”

The new sBMS will be used for the future Entry-Exit System and by all the systems already in use in the European Union: the Schengen Information System (SIS), the Visa Information System (VIS), Eurodac for asylum seekers, and the future ECRIS-TCN for criminals.

“The first time a third-country national will come into Europe, they will be registered and searched in the shared BMS,” Wang explains. “The authorities will then be able to check whether they are the person they claim to be through biometric verification, and make sure they do not overstay.”

A set of alphanumeric data, as well as biometric data, will be collected, checked and stored for three years. The biometric data remains in Europe.

Entry-Exit System to enter operation in 2022

IDEMIA and Sopra Steria enjoy a long-term, historic relationship and partnership with major European Institutions, including the European Commission and eu-LISA. “Together, we have served the Agency on numerous successful, high profile programmes requiring excellence in biometric technology and IT security systems, including VIS, SIS and Eurodac for more than 15 years,” Wang comments.

Both IDEMIA and Sopra Steria have experience of working with the national and local administrations of EU Member States and private sector partners to manage the flow of people across air, land and sea borders. “Additionally, IDEMIA’s biometric technology is recognised as best-in-class and we have been improving and preparing it for this very project for years,” says Wang.

IDEMIA is present in Strasbourg since the foundation of eu-LISA with a local team that is now being upsized for the purpose of the Entry-Exit System and the shared BMS. The entry into operation of the Entry-Exit System is planned in February 2022.

The Entry-Exit System will mean a more complex process for third-country nationals entering the Schengen Area, and Member States will need to properly manage passenger flow at the different border crossing points. “As saving time at borders is key, we can provide airports and border authorities accompaniment to adapt their travel infrastructure with gates for fast processing, specific lanes, and above all self-service multi-biometric kiosks compliant with the EU Entry-Exit System’s regulations,” Wang adds. “Europe will manage one of the largest biometric systems in the world. More than ever before, technology can make the world a safer place. At IDEMIA, we are definitely proud to be part of it.”

IDEMIA is an active member of the ACI EUROPE Facilitation & Customer Services Committee.
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When designing the eezeetags® product, the main functionality was to speed up the end-to-end self-service bag drop process, while enhancing the passenger experience.

IATA forecasts were around a doubling of global passenger numbers by 2035, and Borry Vrieling, founder and Managing Director of Dutch-based company eezeetags b.v. explains that this set huge challenges for the air transport industry in terms of how to cope with these growth numbers.

Installing self-service technologies across the passenger journey, from curb to gate, showed spectacular results. Mobile app check-in, digital boarding passes, automated boarding gates, self-service check-in and bag drop, and biometrics, are all among the technologies that have streamlined the passenger process.

“The results were staggering,” says Vrieling. “Limiting human contact points in these processes resulted in bringing down the overall end-to-end process time and reduced queuing to an absolute minimum. A sure challenge is to do this in a passenger-friendly way which can be related to a positive airline experience – extremely important in these days where brands can be made or broken on social media almost overnight.”

The passenger experience element of self-service is at the heart of the eezeetags development – a unique adhesive that only sticks to itself, allowing a one-picture, language-neutral instruction of simply joining two dots. Indeed, eezeetags are now used at over 50 airports worldwide, in either a dedicated or common use offering.

“Used by 50 million passengers over the course of 2019 at both major hubs and regional airports, and by legacy and low-cost airlines, the growth outlook for the years to follow was both challenging and appealing,” Vrieling comments.

He notes that the first two months of 2020 showed over 60% growth in eezeetags usage. “Then all of a sudden life as we knew it came to an end, with coronavirus impacting every individual on the planet and the travel industry being among the most severely hit sectors globally.”

“The experience gained in recent years has demonstrated to me that the spectacular results of self-service and digitalisation will contribute to facing the new normal.”

He adds that eezeetags have a part to play as a proven initiative, alongside new passenger routings, virtual queue management, smart terminal layout, and off-terminal check-in and bag drop initiatives at hotels, train stations and car parks.

“Mass adoption of market-ready technologies to restore confidence and overcome travel-reluctance will become paramount,” says Vrieling. “The biggest challenge will be CAPEX. On the other hand, the lack of passengers and a non-agile OPEX structure can easily become a life-threatening challenge for airports and airlines alike. OPEX has always been at the heart of our offering and we have huge confidence in the eezeetags product. Although the term ‘social distancing’ was not even invented when eezeetags was born, it appears that now, more than ever, it has become a synonym for ‘self-service to the max’.”

“Self-service to the max”

IATA figures for April 2020 show that 95% of worldwide scheduled flights were cancelled, and pre-COVID-19 passenger levels are not expected until the end of 2021.

Nevertheless, Vrieling believes that the capacity challenge for airports remains, with new rules on social distancing in place. “The experience gained in recent years has demonstrated to me that the spectacular results of self-service and digitalisation will contribute to facing the new normal.”

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“eezeetags are described as ‘easy’, ‘fast’ and importantly ‘clean’. As they are self-adhesive there is no waste, meaning no members of staff need to clean or discard liner paper that has been touched by travellers. Meanwhile, the adhesive used sticks only to itself, so it can be handled while wearing protective gloves, which many passengers may do.”

“eezeetags have always been a small but very important part of the passenger’s self-service journey and will be even more so in the near future,” Vrieling concludes.
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Third independent runway strengthens Istanbul Airport’s status as an international hub

An interview with Kadri Samsunlu, Chief Executive Officer and General Manager, İGA Airport Operation. By Ross Falconer

On 6 April 2020, Istanbul Airport marked one year since the “Great Move”. In its first full year, the airport has hosted 74 airlines and welcomed more than 64 million passengers.

“We are most proud of having built the world’s biggest airport in a record time of just 42 months,” says Kadri Samsunlu, Chief Executive Officer and General Manager, İGA Airport Operation. “We are also very proud of the unprecedented airport transfer process in April 2019, when Atatürk Airport was closed and materials and equipment weighing 47,300 tonnes were moved overnight to Istanbul Airport seamlessly and without any disruption for passengers.”

In June 2020, Istanbul Airport inaugurated its third independent runway, further strengthening its status as an international hub. It is the airport’s fifth fully operational runway and increases airside capacity by 50%. “It also makes Istanbul Airport the first in Turkey, and only the second in Europe, to operate three independent parallel runways,” Samsunlu explains. “Along with the new runway, the second ‘End-Around Taxiway’ to reduce congestion when air traffic is high will also enter service. The airport will be able to accommodate around 2,800 movements each day.”

A healthy and safe travel experience

Similar to other airports around the world, Istanbul Airport suspended scheduled passenger flights due to the COVID-19 outbreak. It used the shutdown to undertake regular maintenance and repair works. Domestic services have since resumed at an ever-increasing frequency from 1 June, while a gradual resumption of international flights to 40 countries began on 10 June.

“Our first priority is to offer passengers a healthy and safe travel experience,” Samsunlu emphasises. “First and foremost, only passengers with a flight, and only working personnel, will be granted access to the airport. We have abundant space to maintain social distance in all areas. By virtue of this advantage, we describe our terminal as having the ‘highest social distance’.

A dedicated İGA Hygiene Team has been formed, which ensures compliance with COVID-19-related measures. Passengers are required to wear a face mask at all
tine rooms equipped with state-of-the-art sanitiser stations placed at relevant locations. For high-risk health testing will be applied in isolated thermal cameras and, if necessary, rapid testing will be used in isolated areas. Hygiene kit vending machines will be set up within the terminal, with hand sanitiser mat at all terminal access points, times, are instructed to walk over a special sanitiser mat at all terminal access points, and baggage is taken inside after disinfection. Trays at the security checkpoints are regularly disinfected, while plans are in place to introduce additional special sanitising systems for tray cleaning.

“All passengers will be screened by thermal cameras and have a body temperature check with contact-free thermometers,” says Samsunlu. “Likewise, all international arriving passengers will be screened with thermal cameras and, if necessary, rapid health testing will be applied in isolated areas. Hygiene kit vending machines will be set up within the terminal, with hand sanitiser stations placed at relevant locations for use by passengers. For high-risk cases, our airport is provided with quarantine rooms equipped with state-of-the-art medical equipment.”

A vibrant social and cultural space

Istanbul Airport is conceived as more than just transport infrastructure – it is a vibrant social and cultural space. There is both landside and airside access to the airport’s Yotel, while the IGA Sleepods provide a private place to get some rest at the airport.

“We aim to bring art exhibitions to Istanbul Airport, the first of which has already been displayed,” Samsunlu explains. “On top of that Istanbul Airport hosts social events. For instance, Usturlab has designed an installation at Istanbul Airport inspired by Islamic Heritage and Science. It is a social initiative that specialises in the production of educational materials for young people. The exhibition will run throughout summer 2020.”

Istanbul Airport also hosted many musical events performed by students from the Faculty of Fine Arts in 2019.

Highlighting market potential of Istanbul and Turkey

Istanbul Airport’s geographical location means it can connect with 141 destinations in Europe, Asia and Africa in less than three hours. It currently has a capacity of 90 million passengers per year, which will be further increased when the next building phases are completed.

“This yields unparalleled growth potential for airlines and offers slot flexibility found at hardly any other airport, so airlines can expand their frequencies to and from Istanbul easily,” says Samsunlu. “We have had close dialogue with our airline partners to highlight the market potential of Istanbul as a city and Turkey as a nation. The Istanbul market is underserved, as the focus from airlines during the last decade has been on commencing new services to other mega-hubs around Europe.”

Istanbul Airport has established a new international route development team. There are no direct services to Australia at present, and the airport is also targeting many underserved destinations in Asia and Africa. “Despite 54 direct routes from our hub, our market share of transfer traffic between Asia and Africa is less than 5%,” Samsunlu explains. “This is a big focus area for us. Furthermore, Africa is a continent with large opportunities and we will be targeting more direct routes from our hub.”

He adds: “Asia-Europe is a large volume market of over 100 million passengers annually, while half of the traffic is still at least one-stop. Our market share is around 11%. Therefore, we will be working on new routes with our home carrier and foreign carriers.”

Cutting-edge technology to enhance passenger experience

Istanbul Airport has a total retail space of over 47,000sqm, and a total food & beverage area of over 33,000sqm. “We were very pleased to welcome internationally-renowned luxury brands like Bulgari and Louis Vuitton with unique and impressive new stores, as well as the new ‘Luxury Square’ by Unifree and Gebr. Heinemann that was unveiled earlier this year,” Samsunlu notes.

Further new brands will be added, such as Nusret, Shake Shack, Subway, HD Döner/Iskender, House Cafe and TRT World Cafe.

Innovative technologies in the retail environment include ‘virtual mirrors’, which allow customers to ‘try-on’ items without physically putting them on.

“Thanks to cutting-edge technology like Big Data, biometrics and the Internet of Things, airlines, airports and technology providers are integrating and collaborating around the passenger experience, which requires a more open exchange of data between aviation stakeholders,” says Samsunlu.

Istanbul Airport’s passenger processing systems will soon be empowered by biometrics with facial recognition technology. Smart cameras will capture the passenger’s biometric data at the conventional check-in desks and self-service kiosks, and use that throughout all passenger touchpoints. “Once the unique ID is created by combining the biometric data, flight information, and passport or ID card, passengers will no longer be asked to present any document during their airport journey from check-in to boarding,” Samsunlu explains.

While the current focus is, naturally, on the extraordinary challenge of the COVID-19 pandemic, looking ahead Samsunlu adds that Istanbul Airport is working hard to achieve the goals set before COVID-19. “Our first target is to reach 2019 figures again as quickly as possible and we feel we will reach these at the end of 2021. Afterwards, our target will be to reach 100 million annual passengers in the coming 5-6 years. We will carry on setting a worldwide example of excellent airport operation by promoting Turkey to the top league of the airport sector.”
The catastrophic damage caused when a drone collides with an airplane presents a clear security threat to airports. At the same time, the risk of a drone incident occurring is increasing because the number of remote-controlled drones for private use, including video-equipped aerial vehicles, is now at an all-time high.

You might ask yourself, who then is responsible when there is a drone incident at the airport? The safety manager would be the obvious answer. But the issue is actually far more complex.

**Determining responsibility**

A drone incident sets off a chain reaction at an airport. Safety managers take jurisdiction when an intruding drone near the runway would put the safety of passengers and crew in starting, landing, and flying planes at risk. Operational managers would take charge in cases of cancelled flights to prevent lost revenue for airlines. Stranded passengers in the terminal become a security issue for the security manager because they are a soft target for terrorism. But such a complex situation requires that all airport stakeholders are informed and have protocols in place.

Rather than working separately, a cross-department joint discussion about how to proactively deal with drones would be much better. Considering the massive operational disruption, reputational damage, passenger dissatisfaction and security risks caused by drone incidents, airports need to mount a strategic response to this growing threat, which affects all stakeholders.

**Technology spotlight: Drone detection meets the perimeter security system**

The positive news: there is already drone detection technology on the market. But by just using radar technology to detect drones, safety managers are missing a critical viewpoint. A visual perspective is also needed for operators to make a threat assessment, to determine whether a drone may be carrying foreign objects, classify the drone and observe its behaviour.

By creating collaborative safety and security measures, airports can better detect and react to drones. Cameras installed along the airport perimeter fence can be integrated with the drone detection system. When the drone detection system is triggered, the system relays the three-dimensional coordinates to the closest camera mounted on the perimeter fence to confirm that the object is a drone, and if so, keep tracking its course.

The system integration of radar based drone detection system with high-definition cameras is already in practice. And critically, integrating airside safety solutions with perimeter security is not only more effective for airports, but also more cost-efficient.

The pressure is on airports to prepare for every scenario. Because when a drone breaches a perimeter, there are two types of airports: those with real-time intrusion detection and cross-departmental response protocols in place, and those caught completely by surprise.

**Who leads the drone discussion? Operations, airside safety or the security department?**

By Maarten Wings, Global Vertical Manager Airports, Bosch Security Systems
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Passenger-centric innovations are increasingly streamlining the airport experience, with biometric, artificial intelligence and big data among the technologies having a growing impact.

Rome-Fiumicino is among the progressive airports embracing a seamless, end-to-end traveller experience. In January it was announced that the airport has launched a Seamless Flow One-ID pilot in partnership with Vision-Box. The aim is to establish the practical foundations of IATA One-ID in Italy by transforming Rome-Fiumicino into a full Seamless Travel ecosystem that offers premium passenger-centric experiences. During the six-month trial, passengers flying from Rome to Amsterdam can participate in testing facial biometric recognition, which is designed to deliver a quicker, easier and more secure journey.

"The pilot is performing well," says Miguel Leitmann, CEO Vision-Box. "Our Seamless Flow solution provides enrolled travellers with an end-to-end self-service experience from check-in, through security and boarding. Passengers who choose to opt-in identify themselves using their facial biometric characteristics which are automatically checked against their official travel documents. Vision-Box's Orchestra identity management platform then manages the entire passenger flow process and always in compliance with EU Data Privacy regulations."

Importantly, no photos are saved, and the temporary biometric and biographic information used for seamless clearance is deleted once the passenger has boarded. "Travellers are indicating that they are very pleased with the faster and easier Seamless Flow passenger experience," Leitmann comments. "They especially like the availability of dedicated lanes for a simplified and faster process, and that they no longer have to show travel documents or boarding passes at multiple points."

Seamless Flow's passenger-centric premium lies in its ability to offer contactless traveller identification, allowing passengers to go through the airport faster by enabling a non-stop passage throughout the entire airport journey. "By providing a frictionless passenger flow operation through all checkpoints, Seamless Flow eases congestion throughout the airport and allows for effective infrastructure usage, while offering a contemporary and modern travel environment for happier passengers," says Leitmann. "Vision-Box also ensures passengers' data protection through a unique Privacy-by-Design (PbD) certification, which covers both the company and our Orchestra platform. It utilises the latest security protocols, data hardening techniques and operates using the strictest privacy standards as per European Union GDPR and ICAO regulations, and the seven foundational principles of the PbD framework."

Seamless Flow also offers airports and airlines reliable biometric passenger identification, real-time information on passenger progress through checkpoints, and flow monitoring throughout the entire system. "This results in a higher level of trust in the integrated security and identity services provided by Seamless Flow, enabling immediate economic benefits on costs optimisation and growth of non-aeronautical revenue," Leitmann notes. "According to the latest ACI research on the impact of happy passengers on non-aeronautical revenue, a 1% increase in passenger satisfaction generates an additional 1.5% in revenue."

"A frictionless traveller experience" Vision-Box was also recently awarded a new five-year Framework Agreement by London Gatwick Airport to deliver end-to-end passenger processing.

"We have been directly supporting Gatwick, and VINCI Airports as a group, for many years in their ambitious plan to transform the airport's passenger flow system into an end-to-end solution," Leitmann explains. "The Orchestra Services Platform is the backbone of future expansion of the Seamless Flow ecosystem using a range of our latest technology and biometric recognition advances."

Initially, Vision-Box will replace some of Gatwick's legacy systems with Orchestra, facilitating Advanced Boarding Pass validation, passenger flow measurement and biometric reconciliation between security and pre-boarding.

"Introducing Orchestra into the airport's passenger flow and identity management system will simplify and automate the passenger journey at various touchpoints across the airport, specifically check-in, security, bag drop and auto-boarding," says Leitmann. "It will support increasing terminal traffic within a limited infrastructure estate and help optimise flow management with the benefit of a frictionless traveller experience."

Looking ahead, Leitmann explains that Vision-Box will continue to expand its partnerships with major airports, airlines and governments in Seamless Flow programmes. "We will be announcing new Seamless Flow projects very shortly with major air transport players that have the potential to be game changers for the entire industry. We are definitely very excited about the challenges ahead."
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COVID-19 has presented an unprecedented global challenge, threatening lives, and the world’s economies. It has raised concern among world leaders, with aviation being one of the most impacted sectors. The pandemic has driven governments to restrict travel, while closing borders to contain the spread of the virus, resulting in challenges airlines have had to address, as they work to shield grounded fleets.

“Although nobody could have predicted the pandemic, global aviation hubs have been known to work ahead of time to develop strategic measures to combat emergencies,” says Engr. Badr Mohammed Al Meer, Chief Operating Officer, Hamad International Airport (HIA). “HIA and its home carrier Qatar Airways were no exception, and have emerged as prime examples during COVID-19. Both entities were faced with the challenges of maintaining partial operations under new health and safety regulations, and constantly evolving flight restrictions and border closures, while paring operations to the proper scale to meet a collapse in passenger demand and steep increase in cargo operations.”

HIA’s efforts were focused on rapidly identifying adaptable solutions, while mobilising all plans from curbside to gate. Meanwhile, Qatar’s airport concurrently kept all stakeholders consulted and informed, while ensuring that employees were properly trained and were provided with a safe environment. “HIA soldiered on to continue providing uninterrupted operations, to respond to the need of the hour,” Al Meer comments. “One of HIA’s key concerns was the rising number of grounded aircraft. As the situation was fluid with countries closing borders gradually and enforcing restrictions, the number of grounded fleets continued to increase, reaching as many as 131 parked aircraft at one time. The grounded fleet consisted of various Qatar Airways operated aircraft types.”

Continuing to accelerate key projects

It is important to note that HIA is also undergoing expansion work amid this crisis. Capitalising on the lull in operations, HIA continued to accelerate all its key projects, despite the hindrances it faced during the process. The current phase of the airport’s expansion is set to increase the terminal’s passenger capacity to more than 53 million passengers annually by 2022, in the build-up to FIFA World Cup Qatar 2022.

“The massive scale of work led to the closure of one of two runways at the airport, as significant parts of the apron were handed over to various contractors, thereby further limiting HIA’s capacity for the grounded fleet,” Al Meer explains. “Fortunately, since the beginning of the impact, Qatar Slot Coordination encouraged airlines to cancel unused slots to have a clear picture of the expected reduction in demand. The airport further conducted a demand/capacity analysis to identify the number of aircraft that would be allocated long-term parking at Doha International Airport (DIA), Qatar’s older airport, and at HIA, to minimise the negative impact on the day-to-day operations.”

Furthermore, to address the duration
teams worked together to meet the enormous amount of towing of aircraft, the "Despite the challenges, and a considerable amount of towing of aircraft, the teams worked together to meet the necessary standards," says Al Meer. "HIA's Airside Department's exercise to come up with a combination of standard parking positions, as well as taxiways that could be used for aircraft parking, proved to be useful as well."

HIA was also responsible for the safe parking of aircraft while ensuring there was no space wastage. The airport had to park the aircraft at unmarked positions, to simultaneously allow maintenance activities to be performed. Furthermore, Qatar Airways' thorough and strict maintenance plans posed an additional challenge for HIA to consider. "Despite the challenges, and a considerable amount of towing of aircraft, the teams worked together to meet the necessary standards," says Al Meer.

As the number of grounded aircraft at HIA kept increasing, DIA, Qatar's older airport, was able to facilitate a large part of the demand in parking space. Due to DIA's limited commercial operations, more than seven taxiways were closed at the old airport, while maintaining the necessary space for military and general aviation use.

"HIA's journey amid the crisis became more challenging as requests for charter flights and excessive cargo demand increased," Al Meer explains. "This complicated matters further, as a number of aircraft had to remain on standby conditions. With Qatar Airways continuing its operations during this crisis to fly over 1.8 million people home and transport over 200,000 tonnes of essential supplies to impacted regions, an effective and quick solution had to be found."

HIA produced a timely contingency parking plan that included parts of concrete taxiways and a complicated configuration in specific apron areas. Through a collaborative and painstaking effort, HIA was able to follow through successfully. "The airport's Airport Operations Control Centre (AOCC) also developed parking plans and contingency aircraft allocation documents which included details on the configuration and the multiple restrictions and constraints that applied to each area in order for all airport stakeholders to use as a guideline," says Al Meer. "This intricate framework was implemented based on the constant flow of information provided by the Scheduling and Planning department, regarding charter and additional cargo flights that changed by the hour. Close monitoring of the capacity in relation to the demand further helped the consistent flow of information."

HIA underwent major challenges within a very short period of time. The airport's operations team quickly familiarised themselves with the new parking configurations, new allocation procedures, and changes in the airport database, while monitoring worldwide travel advisories, and implementing new procedures. "It is important to note that all these changes and adaptations were applied simultaneously at both HIA and DIA," Al Meer comments.

"Overcoming this crisis by working together"

Since Qatar's airport implemented the 'work from home' policy as part of its safety measures, the configurations and procedures had to be handled with minimal on-ground workforce. Contingency rosters were also applied to ensure availability of staff as and when needed. "HIA has proved to be one of the few global airports that have effectively implemented a complicated contingency plan with minimal resources, while its national carrier, Qatar Airways, which is currently the largest passenger airline and cargo airline in the world, has been returning people safely back to their homes and transporting essential goods," says Al Meer.

He adds that the airport's operations are now gradually progressing, while destinations and flights are being reinstated. "HIA is still working closely to facilitate a combination of live operations under reduced apron capacity, reduced staff, and a flexible contingency allocation for the fleet that remains in an operationally ready-to-fly condition. Nonetheless, Qatar's airport remains a resilient global aviation leader, that is keen on overcoming this crisis by working together."

Engr. Badr Mohammed Al Meer, Chief Operating Officer, Hamad International Airport (HIA): "HIA is still working closely to facilitate a combination of live operations under reduced apron capacity, reduced staff, and a flexible contingency allocation for the fleet that remains in an operationally ready-to-fly condition. Nonetheless, Qatar's airport remains a resilient global aviation leader, that is keen on overcoming this crisis by working together."
Finland is an intriguing mix of urban and rural – from the Northern Lights, to beautiful national parks and lakes, and the vibrant seaside city of Helsinki.

Robust air transport infrastructure is vital to the country’s economic prosperity. Its relative remoteness means international connectivity is a key factor, not only in tourism, but also in the growth of the electronics, engineering, manufacturing and biotechnology industries on which Finland’s economy thrives, as well as enabling these businesses to sustain their competitiveness in the global marketplace.

Finavia’s network of 21 airports experienced 4.2% growth in 2019, handling 26 million passengers, with its major, Helsinki Airport, serving 21.9 million (+4.9%).

This year, like all airports, Helsinki has been significantly impacted by the global COVID-19 pandemic. The latest available figures show that between January and May 2020, passenger traffic fell by -54.4% year-on-year to 3.9 million. Traffic was at an almost complete standstill in April and May – down by -98% in both months. Finavia is, nevertheless, planning for the future and recently made the decision to continue with the €1 billion Helsinki Airport Development Programme, including a new Terminal 2, which is scheduled for completion in 2023.

Leading the airport’s recovery and continued development is Ulla Lettijeff, who took the helm as Helsinki Airport Director in February 2020, while also becoming a member of Finavia’s Executive Group. She previously had a long career at Fiskars Group, a leading consumer goods company with globally recognised brands including Fiskars, Iittala, Gerber, Royal Copenhagen, Wedgwood and Waterford, most recently leading the ‘Living’ business unit. Before Fiskars Group, Lettijeff worked in several positions at Nokia, including as Director of Nokia Networks’ Espoo plant.

"The airport industry is very appealing as it is a mixture of different elements like technology, commercial aspects, safety and security, customer experience, processes, and so on,” Lettijeff begins. “It sounded like a nice combination that would inspire me professionally.”

It was certainly a challenging time to enter the industry, just as COVID-19 was starting to spread in Europe. “My initial priorities were getting familiar with the airport community and its culture. I wanted to meet and work with as many people as I can,” says Lettijeff. “To manage the crisis and survive its dramatic effects has been my first job this spring. I’ve overwhelmingly proud of the whole Helsinki Airport community and how it has shown its dedication, support and flexibility to take care of the health and safety of staff and passengers, and together cope with the crisis.”

Naturally, Lettijeff’s previous experiences are informing her current approach, and she articulates that a big part of leadership is managing people through different situations. “I feel that during my career, I have gained experience about how people act in unusual situations and how good leadership can support employees. Before starting at Finavia, I found myself enjoying things like improving customer experience and operative processes, as well as working in a constantly-changing environment. An airport, which is a multi-dimensional ecosystem, is a great collection of these things.”

COVID-19 safety: ensuring travellers have all necessary information

Restrictions on travel within the Schengen area were eased on 14 May, while since 15 June travel to Baltic and Nordic countries has been free. Remaining travel restrictions are valid until 14 July.
Finavia has worked extensively to secure the safety of passengers and staff at Helsinki Airport. “In addition to the things we do at the airport – cleaning, reorganising passenger paths, and offering ways to secure good hand hygiene – one of the most important things is to make sure that people have all the necessary information they need,” Lettijeff explains. “We have a large variety of guidance concerning good hand hygiene, how to keep a safe distance, and the latest government instructions concerning quarantine. We also advise passengers to check-in at home, use face masks at the airport, and travel with as little baggage as possible. All the instructions are collected on a passenger checklist, which is available on our website.”

Despite the current situation, a decision was made to continue the Helsinki Airport Development Programme. It is a long-term investment for the future and Finavia believes that travel will recover. “It is important to be ready when it does, as smooth traffic flow, attractive services and short transfer times are significant then,” says Lettijeff. “The work has progressed as planned on schedule and on budget. Now, about 70% of the entire development programme is completed.”

In 2020, a new parking garage will be opened with space for 1,800 vehicles and a whole floor dedicated to electric cars. The walls of the parking garage are covered with solar panels. “These sustainable achievements are important as Helsinki Airport is carbon neutral since 2017 and we want to reduce the emissions even more,” says Lettijeff.

**HELSINKI AIRPORT FACTBOX**

- **2019:** 21.9 million passengers
- **2019 passenger traffic growth:** 4.9%
- **Jan-May 2020 passenger traffic:** -54.4%
- **Key airline customers:** Finnair, Norwegian, SAS, Lufthansa, KLM
- **Number of routes:** 160+
- **Top 5 destinations:** Stockholm, Oulu, London, Copenhagen, Amsterdam

**Constantly evaluating and refining procedures**

Naturally, Finavia’s biggest and most important goal this year is to ensure that passengers continue to be safe at all of its airports. “This spring the restrictions made by the government, and the procedures we decided to take, forced us to change many processes and details inside the terminals,” says Lettijeff. “If you change one piece of the puzzle, it can have a major impact on the whole passenger process. These changes have required a lot from the staff, because new processes have sometimes been introduced overnight.”

Indeed, she adds that the current situation means constantly evaluating and refining procedures at Helsinki Airport. “A large part of this work is done to support air carriers and our commercial partners, so that they have the security to ramp-up operations which ultimately leads to a good customer experience for our passengers.”
Strengthening Munich Airport’s role as a leading European hub in the post-COVID-19 era

An interview with Jost Lammers, CEO Munich Airport, and ACI EUROPE President. By Ross Falconer

Munich Airport achieved a 10th consecutive record-setting year in 2019, with the Bavarian hub growing by 4% to 48 million passengers. Airlines substantially increased the number of destinations served, especially in the intercontinental segment, which saw a 9% increase in total passengers. Meanwhile, European traffic was up around 4%. These figures underscore Munich Airport’s growing strength as a hub, with increased traffic flows to Asia and the Americas.

This year, like all airports, Munich has been significantly impacted by the global COVID-19 pandemic. The latest available figures show that between January and May 2020, passenger traffic fell by -58.7% year-on-year to 7.5 million.

“Luckily, we have overcome this downturn,” says Lammers. “In domestic and European traffic, the number of flights is growing slowly and since the beginning of June we again have regular non-stop flights to the US. However, this is still on a very low scale compared to 2019.”

In early June, Lufthansa resumed services from Munich to Brussels, Milan, Rome, Vienna, and Zurich, while also reopening its routes to Chicago and Los Angeles. From mid-June, the airline is operating from Munich to the long-haul destinations of San Francisco, Montréal, Delhi, and Seoul, as well as 30 more European cities on a regular schedule.

Meanwhile, Lufthansa subsidiary Eurowings is operating routes from Munich to Palma de Mallorca and Pristina. Other services include Qatar Airways to Doha, AEGEAN Airlines to Athens, Luxair to Luxembourg, and airBaltic to Riga.

Finally, the schedule of existing connections operated by Alitalia to Rome, KLM to Amsterdam, Air France to Paris, Finnair to Helsinki, and Belavia to Minsk, has been partially expanded to provide greater frequency.

The number of destinations served regularly from Munich will increase to around 90 by 1 July.
Cushioning the effects of COVID-19

The airport’s COVID-19 response includes a number of measures introduced to secure liquidity, beginning with short-time work and reduced overtime, through to temporarily closing terminal areas and reviewing and cutting all expenses and investment plans.

Munich Airport is using the slowdown in air traffic caused by the coronavirus pandemic to carry out maintenance work on its runway system. In May, the southern runway was completely closed for around three weeks. All services are currently operating from Terminal 2. The check-in process and floor markings have been designed in close consultation with the competent health authorities, and extensive measures are being implemented to meet the special requirements for providing increased protection against infection in line with the EASA/European Centre for Disease Prevention and Control (ECDC) COVID-19 Aviation Health Safety Protocol. It remains mandatory to wear a face mask in all terminal areas.

Many airports are working with the same tools to cushion the effects of COVID-19,” Lammers explains. “The very good economic results that we have achieved in previous years have been a strong advantage for us. We have also established an efficient and attractive hub thanks to the dynamic development of air traffic in the last 20 years. We are working closely with our airline partners to continue the positive growth performance of earlier times in the medium-term.”

Jost Lammers Curriculum Vitae

Jost Lammers (53) became the new CEO of Munich Airport in January 2020. He has also been ACI EUROPE President since June 2019.

Previous experience:

2008-2019: CEO Budapest Airport
2004-2007: Managing Director, Flughafen Düsseldorf Ground Handling GmbH
1998-2003: Asset Manager/Director, HOCHTIEF AirPort GmbH

Jost Lammers, CEO Munich Airport:

“My experiences at Düsseldorf and Budapest airports are of central importance, since certain processes and tasks in airport management occur again and again, regardless of location. On the other hand, there are also very specific focus areas and strategic goals that ultimately give an airport its own identity. For Munich, this includes further strengthening our role as a leading European hub. This role must be re-established in the ‘post-COVID-19 era.’”

“Collaborative, sustainable, consumer-oriented development”

Alongside his role as CEO of Munich Airport, Lammers is also ACI EUROPE President, having been elected to lead the European airport association at last year’s 29th ACI EUROPE Annual Assembly & Congress in Cyprus.

“What is true for fighting the pandemic also applies to airports and aviation: the more successful we are in bundling our European interests and coming to a common understanding through intensive cooperation, the better the future opportunities will be for all of us,” he says. “ACI EUROPE is a key driver and facilitator to overcome the crisis, thereby also strengthening itself for collaborative, sustainable and consumer-oriented further development of aviation in Europe.”

Looking ahead, from a Munich Airport perspective, Lammers adds that it is still too early to predict when pre-crisis traffic levels will be reached again, but his priority is clear: “To take Munich Airport through the crisis in good shape and get air traffic up again as soon as possible. I have no doubt that the global need for mobility will increase in the medium-term and that air travel will therefore return to growth once more.”

Munich Airport Fact Box

2019: 48 million passengers

2019 passenger traffic growth: 4%

Jan-May 2020 passenger traffic: -58.7%

Key airline customers: Lufthansa, Eurowings, Air Dolomiti, easyJet, Condor

Number of routes: 250+

Top 5 domestic destinations: Berlin, Düsseldorf, Hamburg, Frankfurt, Cologne

Top 5 international destinations: London, Paris, Amsterdam, Madrid, Barcelona

Summer 2020 Airport Business
Could this be the end of a ‘one size fits all’ approach to passenger handling?

HOW AIRPORTS ARE REIMAGINING THE PASSENGER JOURNEY FOR A NEW DECADE

By Iyad Hindiyeh, Global Head of Strategy, Airport IT, Amadeus

For the most part, airports have had the same mindset when it comes to passenger handling: making the passenger journey as smooth and efficient as possible. To achieve this, airport operators have embraced automation, introducing technologies such as self-service kiosks and automated bag drop units. But automation alone cannot completely address the changing needs of travellers, particularly if those automated devices are siloed. Today, travellers have become accustomed to the tailored experiences offered by digital service providers, like Netflix and Amazon, and they expect the same level of personalisation at the airport. As such, airports need to embrace a flexible and holistic approach, so they can tailor the airport experience to meet the unique needs of every passenger.

Imagine a solo business flyer. She checks into her flight from her smartphone, drops off her luggage using an automated bag drop unit, and values the speed and convenience of biometrics. But this traveller’s ‘low-touch’ experience doesn’t necessarily work for everyone. Imagine instead a retired couple that travels once a year for their summer vacation. They value the personal touch that comes from check-in agents and prefer having their passports and boarding passes to hand. With a flexible passenger handling platform, hybrid automated devices, and the right mix of self and full service technology, airports can have the adaptability to meet the needs of both passenger types, servicing them as per their requirements.

Underlying this move to a new more flexible approach is the reality that many airports must accommodate rising traveller numbers, while in many cases not being able to expand physical infrastructure. Automation and optimisation are assisting airports in meeting this challenge, but, as explained above, it can’t be a one size fits all approach. Thankfully, as we enter a new decade, we are seeing the arrival of the key elements needed to create and deliver a truly tailored end-to-end passenger experience.

At Amadeus, our biometric solutions draw on our unique position as a technology provider to the entire travel industry. We can offer travellers the ability to enrol once, use everywhere, and soon we expect passengers to authenticate themselves using biometrics at every touchpoint: check-in, bag drop, security, boarding, even the airport lounge. But why does this matter? Well, if an airport has already done the groundwork of delivering a flexible foundation of self-service and traditional agent-service, then biometrics can be one of the final elements in creating a fully automated experience across the airport. The travellers who choose to use such a solution would be liberated to move through the airport seamlessly, their face automatically recognised as they approach the various touchpoints.

But then, what use is a fully automated biometric journey if the traveller needs to enrol and reenrol with each travel provider and at each destination? That’s why at Amadeus we are bringing our unique SaaS experience and role as a globally trusted IT integration partner to solutions that work across the entire industry: airlines, airports, rail, hotels, hire cars and more.

Airports can no longer rely on the one size fits all approach to passenger service. Instead, they need to leverage new technologies to deliver a tailored, streamlined approach. At Amadeus, we’re proud to be putting in place the building blocks, which enables just this to happen.
Edinburgh Airport is normally Scotland’s busiest. It experienced a record year in 2019, with 3.1% growth to 14.7 million passengers. Typically, around 35,000-50,000 passengers per day would be travelling through the airport in the summer months, but right now that figure is only anywhere between 200-300, so demand is down by around 99%.

“It’s incredible,” says Gordon Dewar, CEO Edinburgh Airport. “COVID-19 has had a huge impact and I think that will be the same for any other airport across the UK, Europe and the rest of the world. I think the numbers are so big that it’s difficult for people to really quantify the impact. The analogy I’ve been using is that this will be like a time machine when it comes to passenger numbers. We’re probably going back to levels not seen for around 30 years, but it will rebound much quicker. It’s how quick that is the question at the moment, and no-one quite knows what that recovery will look like.”

Edinburgh Airport has announced a new campaign – ‘let’s all flysafe’ – as well as a range of measures to help passengers and staff prepare for the return of travel.

“Quite simply it’s to provide passengers with confidence and reassurance as they return to aviation,” explains Dewar. “We know that COVID-19 has had a huge impact on many ways of life, but it’s also impacted on how we live our life, so we wanted to do something that demonstrates to passengers that we’ve thought about them and made improvements to our operation to alleviate any concerns they may have. Aviation has become a focal point during this pandemic and I think some of the focus has been overly concentrated on international travel, but the reality is all industries have faced and will face challenges. But we’ve responded to those challenges and are ready for aviation’s return.”

The airport is also acutely aware of the need to future-proof these changes and has identified a set of measures with the flexibility to adapt to increased demand or changes in health guidance.

When identifying the vital messages to convey in the ‘let’s all flysafe’ campaign, Edinburgh Airport looked at the feedback it had received from passengers through email, social media and face-to-face conversations. “We spoke to a wide range of stakeholders, including travel trade, airlines, other companies and government, to understand their feelings and

Edinburgh Airport launches ‘let’s all flysafe’ campaign to help passengers return to travel

An interview with Gordon Dewar, CEO Edinburgh Airport. By Ross Falconer

Passengers arriving at all points of the airport will have to follow a sky-blue line to take them into the check-in hall and, on this route, they’ll have to sanitise their hands before they enter the building.
perceptions,” says Dewar. “We also looked at the extensive media coverage locally, nationally and internationally to get as good an understanding as possible of the current and future issues.”

Quite quickly, the airport knew there were key areas to focus on, such as the importance of hand cleansing, self-responsibility for our own health, and the need to work together to ensure we are all safe. “We wanted a campaign that made clear we all had a part to play, which is why we went with ‘let’s all flysafe’ as it is our social contract with passengers – we’ll look after you as much as we can if you do your part too,” Dewar explains. “We’re aware of the international profile that Edinburgh has, and we have a number of international passengers passing through the airport, so we knew we had to make the campaign as pictorial as possible to get over that language barrier and make it easy to understand.”

Three different colours have been specifically selected for the campaign – all are outwith the airport’s traditional brand colours. The sky-blue lines will lead all passengers into the terminal, while the maroon-red lines will lead passengers out of the terminal. The third colour is lime green and is used on behavioural messaging.

“The colours used enable people who are colour-blind to differentiate between the different messaging, so where people are asked to clean their hands, be patient, and get ready for check-in and security. ‘The colours used enable people who are colour-blind to differentiate between the different messaging, so where people are asked to clean their hands, be patient, and get ready for check-in and security.’

“An airport that’s always embraced technology”

Edinburgh Airport has introduced the same important safety measures that other airports and sectors have, such as protective screens at check-in, security and arrivals, encouraging the use of face coverings, and enhanced cleaning schedules.

“But we’ve gone over and above that too,” Dewar emphasises. “The biggest change we’ve made is the introduction of one-way colour-coded systems in and out of the airport. Passengers arriving at all points of the airport will have to sanitise their hands before they enter the building. “The inclusive nature of the campaign builds that social contract between us – we’ll do all that we can do, you do all that you can do and together we’ll all ‘flysafe.’ Ultimately, I think we can all learn from each other and I think as an industry we’re already really good at that. Of course, we are competitors but we’re also working to help aviation improve and excel, and that knowledge-sharing piece is crucial to that.”
Discover the essence of Milan in Malpensa.

All the beauty you want with the benefits of Tax Free shopping.
Volotea is a fast-growing airline that recently announced another 41 routes for this summer. It is highly summer-seasonal, which has interesting implications for airports, and with a rapidly-evolving fleet and more direct competition than ever, the carrier is one to watch. Analysis by James Pearson

Volotea fills key niche, but evolution means direct competition is increasing

Volotea is a leisure-focused airline that seeks out unserved routes on a low-frequency basis, with its routes averaging 3.4 weekly flights last year. With 13 bases and 322 routes, Volotea’s route network had a net increase of 64 routes last year.

The airline revolves around Italy, France, Spain, and Greece, which is reflected in its top 10 routes and cities in 2019.

### TOP 10 CITIES IN 2019

<table>
<thead>
<tr>
<th>CITY</th>
<th>TWO-WAY SEATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nantes</td>
<td>1,152,000</td>
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<tr>
<td>Verona</td>
<td>947,000</td>
</tr>
<tr>
<td>Naples</td>
<td>910,000</td>
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<tr>
<td>Venice</td>
<td>810,000</td>
</tr>
<tr>
<td>Catania</td>
<td>795,000</td>
</tr>
<tr>
<td>Palermo</td>
<td>770,000</td>
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<tr>
<td>Bordeaux</td>
<td>724,000</td>
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<tr>
<td>Strasbourg</td>
<td>577,000</td>
</tr>
<tr>
<td>Toulouse</td>
<td>558,000</td>
</tr>
<tr>
<td>Athens</td>
<td>519,000</td>
</tr>
</tbody>
</table>

### TOP 10 ROUTES IN 2019

<table>
<thead>
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<th>ROUTE</th>
<th>TWO-WAY SEATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verona - Catania</td>
<td>302,000</td>
</tr>
<tr>
<td>Nantes – Montpellier</td>
<td>182,000</td>
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<tr>
<td>Athens – Santorini</td>
<td>172,000</td>
</tr>
<tr>
<td>Naples – Palermo</td>
<td>165,000</td>
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<tr>
<td>Athens – Mykonos</td>
<td>151,100</td>
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<tr>
<td>Bordeaux – Strasbourg</td>
<td>133,000</td>
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<tr>
<td>Venice – Catania</td>
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<td>Naples – Genoa</td>
<td>116,000</td>
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<tr>
<td>Naples – Catania</td>
<td>116,000</td>
</tr>
<tr>
<td>Verona – Bari</td>
<td>110,000</td>
</tr>
</tbody>
</table>

Source: OAG Schedules Analyser

Operations resumed after three-month COVID-19 shutdown

Volotea restarted its operations on 16 June, following a three-month shutdown due to COVID-19, with a first flight of the Airbus shuttle connection between Hamburg and Toulouse. In June, the airline also resumed its operations in France, Italy, Greece and Spain. In all of its markets, Volotea has deployed a new network, strongly increasing its domestic offer and reinforcing connections between the continent and the islands. “We are now witnessing many positive signals that encourage travel and will allow people to fly on holidays safely this summer,” says Carlos Muñoz, Founder and CEO, Volotea. “At the same time, we have adapted fast to the new demands in terms of safety, offer and flexibility, and are seeing how bookings are quickly growing every week. We are offering a completely new set of domestic routes, more frequencies and plenty of connections with holiday destinations, especially to the islands. Europeans have been in lockdown for a long period, and now the strong desire to take a safe, well-merited holiday is motivating lots of people to move ahead with life and temporarily-postponed plans.”

Volotea’s total seats up 133% since 2015

Volotea grew strongly between 2015 and 2019: capacity was up 133% with 4.6 million additional seats (CAGR: 18%). While domestic seats doubled and were responsible for most of these 4.6 million, international seats increased by over 200% (CAGR: 25%), albeit from a low base. In 2019, domestic seats represented 65% of Volotea’s total, down from a high of 84% in 2016.
Volotea’s summer seasonality significantly higher than others, but it is falling

Volotea is a highly seasonal airline. It focuses on when people want to travel. This is partly the result of its leisure-focused routes and its large emphasis on Southern Europe.

In 2019, the seat capacity difference between Volotea’s peak month (August) and its lowest (February) was 4.7. This is considerable. By comparison, key competitors were significantly lower: Vueling (1.8), Ryanair (1.7) and easyJet (1.5). Yet Volotea has gradually become less seasonal, with its peak-to-trough month difference down from a high of 8.3 in 2014. This is inevitable as it grows.

Seasonality aided by older aircraft – yet fleet mix greatly changed

Volotea’s significant seasonality is made possible by its comparatively inexpensive and older aircraft with reasonably low fixed costs. It trades higher variable costs for lower fixed costs. In 2015, its fleet fully comprised the Boeing 717 with 125 seats; a good-size aircraft for exploiting thin, unserved routes without too many seats to fill. It started to add A319s – with 156 seats – for both higher capacity and longer range.

By 2019, B717s comprised 46% of its fleet and A319s 54%. Volotea expects only A319s in its fleet for the simplification and economic benefits these will bring.

In Q1 2016, Volotea said its B717s will be gone in the next two-to-three years. Nearly four years later, they produced 3.7 million seats, down only 7% over 2016.

Its A319s have played a crucial role in growing its seats per sector from 125 in 2015 to 140 in 2019, lowering unit costs and growing ancillary opportunities from greater passenger volume.

The balance between the number of seats to fill, aircraft size, market size, and cost reduction and revenue opportunities is forever appealing.

Direct competition inevitably heats up

As Volotea grows, it inevitably faces more direct competition. This is from both remaining unserved or underserved routes that may be within the sights of others, and from its served routes growing and appealing to larger airlines.

Volotea has direct competition with multiple airlines, but let’s look at easyJet, Ryanair and Vueling.

In 2015, 530,000 of Volotea’s seats – or 15% of its total – had direct competition with these three carriers across a total of 23 routes. Come 2019, this had increased to 3.3 million seats – 41% of its total – across 97 routes.

Since 2017, the number of routes with direct competition has almost doubled from 52 to 97. Vueling used to be the number 1 competitor, but since 2018 easyJet took over. Now, easyJet has 51 routes that compete directly with Volotea. Three-quarters of these are because of easyJet’s growing focus on France.

41 new routes recently announced despite COVID-19

Volotea has recently announced 41 new routes across its four key countries: France, Italy, Spain, and Greece. All but one are domestic. France sees 16 new routes, Spain 15, Italy six, and Greece four.

There is a big focus on islands: Corsica to mainland France; the Balearic Islands to mainland Spain; and Greek islands to Athens and Thessaloniki.

In keeping with Volotea’s strategy, most are summer-seasonal, but some, especially involving Corsica, such as Bastia-Paris Beauvais, will be year-round, just reduced in frequency.

“Now that flying protocols are becoming clearer, and that clients will regain the confidence in safe and healthy travel for this summer, we know most of our clients will want to travel more, especially in domestic markets,” says Muñoz. “Therefore, we’ve adapted our network by strongly strengthening all of our domestic connections in Spain, France, Italy and Greece.”

In all, 27 of these 41 routes will face direct competition. Palma-Valencia will have the most competitors: four. They will collectively have 69 weekly frequencies against Volotea’s two.

This intensity of direct competition will inevitably continue as Volotea matures and expands further.
Munich Airport turns to AeroParker to drive improved car parking and ancillary pre-booking

AeroParker, the ecommerce platform for airports, has been contracted to future-proof the online car parking and ancillary pre-booking at Munich Airport. As AeroParker rolls out at Munich throughout 2020 and beyond, Munich Airport will benefit from AeroParker’s dynamic demand-based pricing, subscription parking, the selling of ancillar- ies such as lounges, e-charging, car wash and a valet service in the same single basket, a configurable loyalty programme, customer account management with cancellation and refund, BI with extensible dashboard reporting and REST API integration with third parties – all for an enhanced cus- tomer experience.

At Munich Airport, AeroParker will be inte- grated with SKIDATA’s sweb interface to the latest version of Parking. logic and the most up-to-date version of Wirecard as a Payment Service Provider. AeroParker will also integrate with Park.Aero, an initiative of German, Swiss and Austrian airports to provide pre-book pricing and availability for Munich Airport that enables passengers to pre-book parking via the Park. Aero website.

“We are very pleased to welcome Munich Airport as an AeroParker customer,” says Jon Keefe, CEO AeroParker. “It shows that long-time advocates of pre-booking such as MUC can also benefit from the many innovative AeroParker features.”

Peter Bayer, Head of Services and Parking, Munich Airport, comments: “We are very pleased to have signed the contract with AeroParker. To be able to offer the improved, world-class car parking and ancillary pre-book- ing experience that AeroParker brings is great news for our customers.”

INNOVATION SHOWCASE
Automated Border Control, enhanced COVID-19 protective measures, smart technology, and a contactless airport experience are among the innovations being implemented by airports. Report by Ross Falconer

Now mainstream: Automated Border Control

Today, over 350 secunet easygates are already in use at major international airports, including in Germany, Austria, the Czech Republic and Iceland. The latest to be installed are in Lithuania, Poland and Hungary. Automated Border Control systems can help to avoid increased workloads and waiting times resulting from further increasing passenger numbers and the introduction of the European Entry/Exit System. In combination with electronic identity documents, eGates, Automated Border Control systems like the secunet easy- gate, enable border control to be largely automated. The major- ity of passengers who previously had to stand in queues at the border con- trol counter can now, therefore, undertake the border crossing by themselves.

The automated process is extremely simple and has now been promulgated worldwide. Passengers are, therefore, increasingly familiar with it: the secunet easygate checks the authenticity of the electronic identity document presented both optically and electronically. In addi- tion, the system reads the facial image of the traveller from the chip in the electronic identity document and compares the biom- etric data with the live image of the individual. This all takes place in a very short amount of time. Travellers have already used secu- net easygates around 100 million times. The latest systems to be installed are those at the busy international airports of Vilnius, Budapest, Debrecen, Warsaw Chopin, and Warsaw Modlin.

All parties involved benefit from automa- tion – border officials mainly monitor the process on screens and can focus on those passengers where further investigations are necessary, airports benefit from higher passenger numbers, and travellers enjoy shorter waiting times.
Gatwick Airport introduces COVID-19 protective measures as it reopens North Terminal

London Gatwick Airport has introduced a range of measures to protect the wellbeing and safety of both passengers and staff. The airport reopened its North Terminal on 15 June, with airlines starting to scale-up their flying programmes.

The wellbeing and safety of passengers and staff remains Gatwick’s top priority online – available on Gatwick’s website and app – digital and physical signage advising passengers of the new health measures is displayed throughout the airport.

“Having remained open throughout this pandemic, the wellbeing and safety of our passengers and everyone that works at the airport remains our top priority,” says Stewart Wingate, Chief Executive, Gatwick Airport. “We have introduced a range of new social distancing and hygiene solutions to help this happen, so we can all help protect each other when travelling through the airport. We want people to understand that airports and air travel is a safe environment in this COVID-19 travelling world.”

London Gatwick Airport has introduced a range of measures to protect the wellbeing and safety of both passengers and staff. The airport reopened its North Terminal on 15 June.

Smart technology fundamental to resumption of air travel

SITA has shed new light on how technology is helping airports and airlines safely resume operations and help implement new hygiene measures to restore passenger confidence after a lengthy shutdown due to the COVID-19 pandemic.

“Our industry must transform the passenger experience to increase travel safety, while balancing economic pressures from slow customer demand,” says Sebastien Fabre, Vice-President Airline & Airport, SITA. “To successfully walk this tightrope and navigate a return to the skies for viable volumes of passengers, airports and airlines need to assimilate new information from governments and health officials, adapt operations immediately and automate processes permanently.”

SITA has introduced solutions that allow passengers to use their mobile device as a remote control for touchpoints such as self-bag drop and check-in kiosks, removing the need to touch any airport equipment. “For example, at San Francisco Airport, we have SITA Flex which in future will enable a full mobile and touchless passenger journey. This means travellers can print bag tags from their mobile phone on self-service bag points,” Fabre adds.

Bengaluru Airport introduces “parking-to-boarding” contactless airport experience

Bangalore International Airport Limited (BIAL) has introduced a parking-to-boarding contactless journey at Kempegowda International Airport, Bengaluru (BLR Airport).

With greater emphasis on minimum exposure between passengers and airport staff, BIAL aims to minimise all physical contact at the airport. The technology will enable a seamless airport journey, with greater emphasis on health and safety. As part of the new procedures, passengers are required to wear face masks and carry an e-/printed-boarding pass. Once inside the terminal, passengers scan their boarding pass at a contactless self-service kiosk and use automated self-bag-drop facilities. In addition, travellers must follow the safe distance markers placed on the floor. At the departure gates, passengers will undergo a thermal scan.
Luxottica unveils its ‘Shield Your Eyes’ initiative to better ensure the safety of its customers and employees

The recent launch of Luxottica Group’s ‘Shield Your Eyes’ Initiative shows how the group is committed to set high standards in eye protection in order to offer a safe consumer experience. This new initiative features a curated collection of products that provide greater coverage around the eyes at a time when safety has taken central stage. It was developed in response to growing consumer demand for eyewear that provides extra protection for everyday life and sport. Alessandro Pozzi reports.

Safety is a key value to Luxottica. More than ever, Luxottica is quickly adapting to changing times and behaviours to meet new consumer needs. Nowadays, the consumer mindset is very much focused on safety and protection and Luxottica is taking it seriously. Luxottica’s new collection is a clear reflection of the company’s global efforts in influencing the safe return of travellers. The company is working closely with its travel retail customers to make the Shield Your Eyes collection more easily accessible to ensure the safety of its employees and consumers.

Luxottica’s new collection consists of eight Oakley clear models, eight Oakley photochromic and Oakley Eye Safety Systems (ESS) models that come with lens prescription options and anti-fog features. Oakley lends its strength and expertise in performance eyewear to the Shield Your Eyes collection, with a mix of iconic models that feature a wider coverage area, as well as a selection of models that are certified as Personal Protective Equipment (PPE). All products are equipped with:

- High Definition Optics®, a patented technology that eliminates distortion to give the user clearer, sharper, and more accurate vision
- Plutonite® lens to block 100% UVA, UVB and harmful blue light, and
- Impact Protection that guards against high velocity and high mass impact.

In addition to their safety features, these models have an aesthetic appeal and deliver long-wearing comfort to the user. All Oakley products in this collection meet the eye protection standards of the American National Standards Institute. In addition to the frame offering, the Oakley brand is bolstering its safety apparel collection with the release of a series of masks, neck gaiters, bandanas and garments made from antibacterial fabric and featuring detachable PPE elements, available in stores from mid-June.

The ESS range has been designed and distributed for decades for military, first responder and industrial use and certified as PPE. All ESS products have met or exceeded the most stringent U.S. military standards and are made of ballistic polycarbonate lenses equipped with 100% UVA/UVB protection. The lenses also deliver distortion-free optical clarity and have anti-fog (ClearZone™ FlowCoat) and anti-scratch (ToughZone™) treatments.

Alessandro Pozzi, Global Channels Director, Luxottica Group, commented: “Safety remains a top priority for all our consumers, and the ‘Shield Your Eyes’ collection is a reflection of our rapid and effective response to these demands. In this ever-changing landscape, we really must adapt and evolve and, at Luxottica, we remain steadfast in our commitment to ensuring our consumers are equipped with the best eye protection – there is no company better equipped to help consumers shield their eyes than us. With innovation playing a key role in everything that we do, we will continue to develop and offer state-of-the-art products for all.”

Alessandro Pozzi is Global Channels Director, Luxottica Group.

1. PPE with certification is only available for USA and EU markets.
2. American National Standards Institute (ANSII) is an organisation that develops guidelines for personal protection equipment and devices. These devices undergo intensive testing to ensure they will protect eyes as expected, and ANSI is a baseline standard for eye protection.
3. Military Combat Eye Protection System (MCEPS) was established in 2002 to acknowledge the need for higher-level eye protection for military members. The military specification, MIL-PRF-32432, outlines and implements the MCEPS, which is the warfighter’s standard for eye protection.
ACI EUROPE is pleased to bring Airport Exchange to Amsterdam following recent successes in Abu Dhabi, Oslo and Oman. Airport Exchange is Airports Council International’s biggest annual trade show and is a truly global event drawing 1,000+ attendees, 50+ exhibitors & sponsors, and 100+ expert speakers. The three day event, taking place at the Rai on the 8-10 December 2020, is considered one of the most important gatherings in the aviation industry, assembling hundreds of top executives from Europe, Asia Pacific, and the rest of the world.
Salalah Airport
Ranked 7th - In the World -

Muscat Int’l Airport
Ranked 4th - In the World -

Ranked 6th - In the World -

Ranked 8th - In the World -

Ranked 9th - In the World -

To be among the top 20 airports of the world by 2020