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Highlights: The ACI 10th Annual Airport Economics & Finance Conference & Exhibition

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ACI’s Regional Offices

ACI North America
Washington, DC
USA

ACI Latin America and Caribbean
Panama City
Republic of Panama

ACI Africa
Casablanca
Morocco

ACI Europe
Brussels
Belgium

ACI Asia-Pacific
Hong Kong
China
Although ACI does not promote any particular form of airport ownership and management structure, the recent attacks on one form, privatization, prompts some elucidation.

Until relatively recently, nearly all major commercial airports around the world were government-owned and government-operated, primarily on a cost-recovery basis. Deregulation in the aviation sector was initially focused on airlines, although a number of countries also divested their airports and air traffic control services. Most recently, this deregulation in many parts of the world was followed by a dramatic shift in the way airports were operated such that, airports no longer operate as a homogeneous group of public utilities but as a heterogeneous group with ownership structures ranging from being government-owned to being partially or fully privatized. More than that, even government-owned-and-operated are increasingly required to have a commercial focus.

In an economic climate where states are increasingly cutting government expenditure to reduce growing debt, continued government financing and full ownership of airports are not always viable and sustainable options. By the same token, many national governments find themselves in a predicament where a surge in air transport demand is outstripping the infrastructure available to accommodate growing markets in their jurisdictions. In addition, the liberalization of air transport presents airports with new challenges for their operation, planning and development, and financing.

The need for airports to have both the flexibility and financial resources to meet those challenges should therefore be recognized and actions must be taken today. The fundamental motive for airport privatizations or public private partnerships (PPPs) is to finance what states are no longer able or willing to finance. Private sector stakeholders bring commercially-driven management and the flexibility to adapt to a fast-changing world. Furthermore, private investment and entrepreneurship often go hand-in-hand. Entrepreneurs generate innovations and value for customers, but they also expect a return for the risk that investors must bear in doing so.

While the airport industry is characterized as having high barriers to entry, which include significant capital and infrastructure costs, airports also face increasing competition from other airports and
modes of transportation. Many airports compete for connecting traffic, be it domestic or international. In some regions, airports not only compete with one another for connecting traffic but also with airports in other world regions. Over the last 30 years, airport privatization has become an important investment vehicle for the development of infrastructure to accommodate air service demand; to contribute to community and national economic vitality; and to enhance the customer passenger experience. It has been applied globally in important aviation markets, including Europe, Australia, Brazil, China and India.

Airports with private sector participation account for an estimated 14% of airports worldwide, handling over 40% of global traffic and investing 44% of global capital expenditure to develop both the aeronautical and non-aeronautical side of the business.

There is strong evidence that private investment in airports generates an improved passenger experience. ACI's Airport Service Quality (ASQ) programme – the well-established global benchmarking programme measuring passengers’ satisfaction while they are travelling through an airport – shows that airports that had some form of private sector involvement experienced an increase in passenger satisfaction scores over the last decade.

Contrary to the assertion that the appropriate regulatory framework has not been found for privatized airports, the flow of private capital to the airport industry is enabled by well-crafted economic incentives, together with general consistency in regulatory frameworks. Liberalized approaches and national policies that lean away from the “single till” accounting method toward “dual” and “hybrid till” frameworks are more attractive to private investors. This is consistent with market-based principles that create efficiency gains that generate value throughout the air transport value chain.

Statements made by some that airport privatization has, over time, increased costs for users is unfounded. The ACI 2018 Airport Economics Report reveals that, worldwide, unit airport charges have been broadly flat over the past years.

Privatization has normalized the way airport infrastructure is financed allowing airports to move from a dependence on tax payer funding towards a greater reliance on the ‘user pays’ principle espoused by the International Civil Aviation Organization (ICAO).

ACI World continues to advance the development of an effective aviation system by enhancing regulators and public awareness of the economic and social importance of airport development. For that reason and to better inform policymakers, ACI World is publishing a third Policy Brief on “Best Practices for Airport Privatization: How can Governments create fertile grounds for private investment airports” that will showcase best practices for airport privatization.

I look forward to sharing with you the informative and engaging sessions and the opportunities to network with peers from around the globe.

Angela Gittens
Director General
Later this month, a compelling lineup of top airport and aviation industry CEOs will assemble to headline the ACI EUROPE/World General Assembly, Congress & Exhibition, to be hosted by Brussels Airport, from 18 to 20 June 2018.

This year’s conference theme is “Airports as Brands and Businesses” and aims to address the consequences of the ongoing evolution of the airport industry into companies building brand relationships with air travellers.
Before the conference opens with welcome and keynote addresses, delegates will have the opportunity to participate in a series of pre-conference forums, on Monday, 18 June, addressing some of the industry’s key focus areas:

- safety and operations;
- security and facilitation;
- cargo; and
- human resources.

The Airport Leaders’ Symposium features a panel of leading CEOs from across the globe, including Airport Company South Africa, Brussels Airport, Hong Kong International Airport, Munich Airport and Corporación América. Delegates will hear from both the CEO of Lufthansa and Norwegian and will be treated to a special briefing from EUROCONTROL on the challenges of growth.

Furthermore, in an era when consumers might “ask Alexa” where they should go on holiday, how can an airport stand out as a brand? Skyscanner’s Senior Director, Hugh Aitken, will attempt to answer this question, as well as present the top 10 travel trends airports should be thinking about. The conference programme will also feature a session entitled Creating Fertile Grounds for Investment, which is sure to generate lively discussion on assessing risk when investing in the airport sector, how regulatory models capture the risk, how private capital can be a viable solution for States, and much more.

The second day of the event will begin with the ACI EUROPE and ACI World Annual General Assemblies, the latter followed by the AMPAP graduation. The sessions will take a different turn, focusing first on Sustainability and Corporate Social Responsibility (CSR) Values and how airports can successfully define and incorporate CSR values that are in line with their community’s expectations into their branding and overall business strategy. The panel will be moderated by Mike Boonen, Partner, KPMG Belgium and will feature input from the CEOs of Abidjan Airport, Quito Airport, Geneva Airport, Athens Airport and Basel Aero.

The last session of the day will highlight the Airport Brand and Digital Transformation: Where does the passenger journey begin and end? Moderated by Anne-Marie Pellerin, Managing Partner, Lam-Lha, the panelists will discuss key actions to enhance the airport brand with digital transformation. A special briefing on Chinese aviation market developments will be given by Dr Zheng Lei, President of the Institute for Aviation Research.

Finally, Angela Gittens, Director General, ACI World will join Alexandre de Juniac, Director General and CEO, International Air Transport Association (IATA) to close the event with a moderated discussion about the key subjects raised during the conference while also canvassing the major issues confronting the industry.

We welcome all airport professionals to join the conversation in Brussels on airports as brands and businesses.
Feature airport

Calling all future airport experts: London Gatwick’s vision to inform, inspire and invest in young people.

By Paula Aldridge, Community Engagement Manager
Airports offer a world of opportunity for more than just passengers. They are also fantastic places to work. London Gatwick is passionate about showcasing the wide range of careers at the airport and providing inspiration using real life examples.

Around 24,000 people work at Gatwick in a wide variety of companies and diverse roles, and the airport is keen to provide motivation to the next generation. It is an exciting place to be and, as the airport continues to grow, it is critical to build a pipeline of talent.

An important part of this outreach is Gatwick’s education programme which aims to inform, inspire and invest in young people. It is all about bringing to life the diverse range of roles on offer and helping students develop the right skills to get their dream job.

Much of Gatwick’s work with young people focuses on inspiring students around the importance of “STEM” subjects – science, technology, engineering and mathematics – and how these skills are used in a real working environment such as an airport. The fact that Gatwick operates the most efficient runway in the world, with up to 950 aircraft movements a day, makes this an exciting place to learn!

By getting schoolchildren and students interested early on, Gatwick is investing in its future workforce and creating employment opportunities and routes into some of the UK’s most unique and inspiring jobs.

Learn Live – coming to you live from Gatwick

Gatwick’s Learn Live programme brings airport life directly to classrooms all across the UK in real time and for free. Including videos and live interaction sessions with Gatwick employees, students can take a unique look at what it is like to work at the UK’s second biggest airport.

Working with its airport partners – known as the “Gatwick Family”; past sessions range from talking to the air traffic control team live from the tower, a Q&A with an easyJet airline captain and a “look at what the Met Office – the UK’s national weather service – does at Gatwick.” Schoolchildren have even had a chance to explore Gatwick’s IT and baggage systems and ask questions to the airport’s team of ecologists and biodiversity specialists.

To date, Gatwick is the only UK airport to offer this type of programme to schools. In 2017, the airport broadcast Learn Live to over 50 schools and had 20,000 student and teacher views all across the UK – and plenty more are planned.

Engineering and Construction is cool for kids

Engineering and construction skills are critical to many roles at airports, and Gatwick wants to be at the forefront of inspiring young people to join the team and be part of its continued growth and success. The airport is actively involved in many partnerships, and events in the local area are designed to encourage youngsters to get involved in these compelling subjects and spark a passion from a young age.

In the past few years, Gatwick has enthusiastically hosted regional FIRST® LEGO® League tournaments where students compete to build robots and has been a headline sponsor in the
“Big Bang” Fair South East. Part of a wider, national STEM festival, which gives 20,000 local young people the chance to learn about STEM career paths, the “Big Bang” final event gives students a chance to experience careers at the airport through activities, shows and workshops. This year is particularly exciting as Gatwick supports the **UK Government’s national “Year of Engineering 2018”** campaign, which celebrates engineering and helps to raise its status as an aspirational career path among young people, their parents and teachers.

**Competitive spirit**

Following the airport’s active role in promoting STEM subjects to young people, this spring, Gatwick launched a nationwide competition for schools. Students have been invited to submit their best energy saving ideas with the opportunity to win an award and an exclusive behind-the-scenes tour of the airport.

The competition, which is run through Gatwick’s Learn Live broadcast portal, challenges students to develop an effective energy saving idea which could be implemented at the airport. Aiming to encourage interest in STEM subjects, Gatwick has teamed up with the [British Science Association’s CREST Awards](https://www.britsci.org.uk/crest) scheme. This is the only nationally recognised accreditation scheme for STEM project work and encourages students to learn by solving a problem or answering a question, rather than simply following instructions or being presented with information.

True to Gatwick’s own innovative way of working, students working on ideas for the competition can use the Learn Live sessions to ask questions directly from their classrooms to Gatwick’s engineering and technical employees, and receive immediate expert feedback as they develop their entries. Ideas can be anything from using a new low energy technology to how Gatwick could carry out a process in a more energy efficient way.

**A helping hand for teachers**

**Gatwick produces resource packs for teachers** that contain interesting and useful facts about careers at the airport. The idea is to introduce young students to the variety of diverse careers on offer, providing inspiration, key facts and information about each role, alongside the skills and qualifications required. There are also questions related to the roles for students to think about and discuss. From terminal operations to airfield engineering, security to retail, these packs complement Gatwick’s Learn Live broadcasts and support student discussion on the video topics.
Welcome to London Gatwick

• World’s most efficient single-runway airport
• Busiest day to date saw 950 aircraft movements (1 September 2017)
• Serves more than 228 destinations across 74 countries
• Network of over 60 long haul routes
• Welcomes 45 million passengers a year
• 30 minutes by direct rail into central London
• 129 direct rail connections across the UK

Learn more about London Gatwick

The airport’s community and educational work

Find us on Twitter, Instagram, Facebook, LinkedIn and YouTube
The Global ACI-ICAO Airport Management Professional Accreditation Programme (AMPAP) is an executive development programme for airport executives worldwide. The primary focus is to develop airport managers through a six-course curriculum that covers all functional areas of the airport business in key areas. AMPAP encourages participants to share best managerial practices in an interactive, cross-cultural environment while establishing a global network of contacts.

Look out for 2018 Gateway course venues

www.IAP.aero
ASQ interview feature: Adelaide Airport

By Sevda Fevzi, Manager, ASQ Strategic Marketing, ACI World
ACI’s Airport Service Quality (ASQ) programme is now in its 12th successful year and, as we celebrate this milestone, we are focusing on how airports are increasingly putting the passenger at the forefront of the airport experience.

In 2018, we will be evaluating how the ASQ programme and its series of optional tools helps our airport members by guiding high-level decision making, optimizing and prioritizing initiatives and closely monitoring customer experience service levels.

In this edition, I speak with Alicia Mackay, Acting Customer Experience Manager at Adelaide Airport.

1. What is the mission / vision of Adelaide Airport?

Adelaide Airport’s Vision is to be a top tier Airport Business Centre in the Asia Pacific, recognized for delivering exceptional outcomes for our customers, partners, shareholders and community.

To realize our vision, we will consistently:

• nurture strong relationships with our stakeholders;
• offer a great customer experience;
• develop the expertise of our talented team;
• deliver high-quality facilities and services that are regarded as the best in class, safe, secure and sustainable;
• strive for innovative solutions and continuous improvement; and
• partner responsibly with our community.

2. What does customer experience mean to Adelaide Airport?

At its heart, our customer commitment is simple: make the customer experience easy, seamless and connected.

That commitment is underpinned by our understanding of what drives customer satisfaction and customer perception at our airport – knowledge achieved through ongoing research and feedback.

We also know that our customers will judge us on the collective performance of the entire airport community so we strongly promote a culture which supports consistently high-quality customer experiences for our external and internal customers at every “touch point” – extending to the way we think, look and act.
3. Why is this important to your airport?

We are committed to continuously developing and enhancing the experience for all of our customers. Our customers are many and varied, ranging from travellers, visitors, airlines, tenants/concessionaires, contractors, border agencies and other government departments.

Airports are complex ecosystems that are made up of many companies all working together to provide the overall customer experience. Working in this environment can be challenging and the development of strong relationships with all of the key stakeholders is crucial to the success of our business.

4. Adelaide Airport currently subscribes to the ASQ Departures and the new Arrivals Survey.

A. How is each survey being used to guide decision making?

The survey findings help us determine the key drivers of customer satisfaction. From this information, we establish key performance indicators and implement customized standards and action plans to address them in collaboration with our airport partners.

B. How are the survey findings used for strategic or tactical reasons and for actionable plans?

ASQ results are used as Key Performance Indicators for some of our key contracts, including security screening and terminal cleaning. Our ASQ monitoring results are used in the justification of many business cases for new projects.

We regularly gain insights into our customers through our analysis of survey feedback – it can be surprising to learn what our customers feel about a particular airport service.

C. How does the ASQ programme help to achieve Adelaide Airport’s objectives?

We monitor our overall Airport Service Quality and welcome and listen to feedback with the aim of consistently delivering our service promise. What our customers say and feel about our services and facilities is integral to our management of the Airport. Gaining a complete picture of our customer’s journey, expectations and satisfaction drivers, support prioritizing and improvements to our customers’ experience.

Benchmarking also assists us identify improved processes, and new ideas and trends, and helps us enhance customer satisfaction.

5. Adelaide airport subscribes to the additional optional reports of ASQ Comprehensive Insight Report and the Comments Analysis, which are two of the many enhanced services derived from the ASQ Departures programme. Why were the Comprehensive Insight Report and Comments Analysis chosen amongst all the optional reports?

Our desire to obtain a deeper understanding of our customer is supported by these additional reports to get the most out of our data.

The analysis of derived importance and stated importance assists identification of elements that have the most impact on our customer’s satisfaction.
**Airport code:** ADL

**What year your ADL airport opened:**

Adelaide Airport Limited purchased the operating leases for Adelaide and Parafield Airports in May 1998 to operate both airports for the next 50 years with an option for a further 49 years.

Construction of our multi-user integrated terminal started in November 2003 and the terminal opened in October 2005. The project cost $260 million and, at the time, was one of South Australia’s largest and most significant privately funded civil infrastructure projects.

**Annual passenger numbers in 2017:**

Adelaide Airport is currently the fifth-largest domestic airport and sixth-largest international airport in Australia. It is the aviation gateway to South Australia, and we process more than 8 million passengers annually.

**Number of employees:**

Adelaide Airport Limited (the management company that operates the airport business) has 171 employees and the terminal has in excess of 3,000 employees. Adelaide Airport is the single largest employer base in South Australia, directly employing more than 8,700 people “on-airport” and contributing to the employment of an additional 9,000 people off site – a total of more than 17,700 people.
Did you know? Fun fact of Adelaide Airport:

We have been successfully operating a Volunteer Ambassador Program since the opening of the new terminal in October 2005. We currently have a total of 40 volunteers generously giving their time to provide exceptional customer service to passengers and visitors to the Terminal. The program operates seven days a week from 5:00-22:00 hours (ACST), and has been developed and operated within the Customer Service business unit.

The Ambassador Program is a key part of the overall customer experience at Adelaide Airport. In essence, the Ambassador’s role is to assist visitors with information, directional assistance and general “meet and greet” services. The presence of Ambassadors helps visitors through our terminal, while also promoting South Australia as a premium tourist destination.

Based on the success of the existing Ambassador Program, we introduced the International Ambassador Program in November 2016. This initiative was in response to the increase in Chinese visitors to the State, driven primarily by the commencement of China Southern Airways flights to Adelaide. The 14 International Ambassadors all have Chinese and English language skills and, while they specifically cater to the cultural and language needs of Chinese visitors, they also provide excellent customer service support to the millions of other visitors to our terminal.

Follow Adelaide Airport on social media:

Twitter: @AdelaideAirport
Facebook: www.facebook.com/AdelaideAirport/
Instagram: @adelaideairport

KEY BENEFITS OF USING ACI’S ECE

EMPLOYEE ENGAGEMENT
CUSTOMER SATISFACTION
REVENUES
HIGH MORE INCREASED
+1 514 373 1200
aciasq@aci.aero
aci.aero/Airport-Service-Quality/ASQ-Home
BE CUSTOMER READY WITH ACI’S EMPLOYEE SURVEY FOR CUSTOMER EXPERIENCE (ECE)

- A tool specifically designed to help airports be “customer ready”
- A survey that can be used year after year
- A measure of employee performance and engagement to strive higher
- An ideal complementary tool for existing ASQ airport members

KEY BENEFITS OF USING ACI’S ECE

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<td>Feeling of valued contribution and belonging to the airport community</td>
<td>Growth of revenues, improved productivity and employee retention</td>
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+1 514 373 1200  
aci.aero/Airport-Service-Quality/ASQ-Home
The Boeing 777X Airport Compatibility Group (BACG) meets to finalize a Common Agreement Document

*By David Gamper, Director, Safety, Technical and Legal Affairs, ACI World*
As the culmination of nearly two years of work by airlines, airports, civil aviation authorities and the Boeing Company, a Common Agreement Document was agreed at a meeting at the Boeing assembly plant in Everett, Washington on 24 April 2018. This relates to the new 777-9 aircraft that is to enter airline service in 2020, and describes how it can be accommodated at airports that have substantially Code E infrastructure. This will avoid the cost to airport operators of upgrading to Code F standards which is largely unnecessary because the aircraft is to be equipped with folding wingtips that when folded are within the Code E wingspan of 65 metres, but when unfolded have a 72 metre span, still short of the A380’s 80 metre span. Boeing predicts that over time, some 200 airports will be called on to accommodate the folding wingtip aircraft.

The aircraft is expected to be certificated to operate on a 45 metre wide Code E runway with shoulders. It will begin to fold its wingtips on the runway, triggered automatically when its speed drops below 50 knots and will terminate folding on the exit taxiway before entering the parallel taxiway system as a Code E aircraft. On departure, it will be able to taxi as a Code E aircraft and unfold its wingtips at the runway holding point, or if that would cause too much loss of runway capacity, start to unfold while taxiing; in this case, the part of the taxiway onwards from the start of unfolding must be able to accept the full 72 metre wingspan with adequate clearance, based on a safety study. The CAD contains the appropriate generic risk assessments.

The document also describes mitigations for non-normal operations, when a wingtip is not able to be folded normally or does not unfold at the right time – these are expected to be very rare events.

The document is available upon request to dgamper@aci.aero. The next step is to arrange for its endorsement by as many CAAs as possible, and as a priority by CAAs having airports under their jurisdiction where the seven announced 777-9 airline customers (ANA, Cathay Pacific, Emirates, Etihad Airways, Lufthansa, Qatar, Singapore Airlines) are based. Including firm orders and options, the 777x programme, which will also include the smaller but longer-range 777-8, has achieved over 300 orders.
Is there a doctor on board?

By Klaus Hoerschlaeger, Regional Vice President Sales and Sales Region Africa and France, Rosenbauer International AG

How many frequent flyers have not heard this appeal? It marks the beginning of a medical emergency at an altitude of 10,000 metres, which may even lead to the flight being interrupted. The fire service at the airport being used for a stopover must be in position immediately in order to evacuate sick or injured passengers from the aircraft as quickly as possible for subsequent transport to the nearest hospital. For this task, they use special rescue staircase vehicles.

According to a study published in the New England Journal of Medicine, during 2013, a medical incident occurs on average once in 604 flights. The authors estimate that worldwide there are at least 44,000 emergencies on aircraft every year. The most frequent causes are circulatory and respiratory problems, nausea and vomiting. The aircraft cabin atmosphere alone, with its lower air pressure and reduced oxygen saturation as compared to the ground, has a negative impact on many people.
In almost half of the emergency situations studied, a physician was found, but in 7% of cases the pilot had to head for the nearest airport. The data from five US airlines for the period from January 2008 to October 2010 was evaluated and showed that 11,920 emergencies occurred in the course of seven million flights with over 700 million passengers.

**Rapid assistance on the runway**

If owing to the seriousness of an emergency, an aircraft is forced to make a stopover, the airport fire service swings into action. It deploys special escape stairs for the evacuation of the passengers. Firefighters can attain rapid access to the cabin interior via the stairs and are therefore able to evacuate injured or indisposed persons out of the aircraft extremely quickly.

**Barrier-free exit**

Rescue staircases allow people to leave the aircraft three abreast, even if a stretcher is involved. The entire step body has a width of 1,500 mm and is shaped to exactly match the human anatomy. In addition, at the bottom of the stairs, a hydraulically folding ramp ensures simple and safe access both to and from the staircase.

**Early adopter**

The first rescue staircase (5m Version) was delivered to Geneva Airport, which is certainly one of the early adopters of innovative fire industry technology. In 1992, this airport put the very first Rosenbauer PANTHER into operation.

**Happy landings**

Rescue staircases are special vehicles that provide emergency services with very quick access to the interior of an aircraft and thus allow the quick and safe transport of anyone who is sick or injured out of the plane. They can also be used for evacuations of entire airliners. The Rosenbauer portfolio contains a complete range of rescue staircases.

**Examples of usage for Escape Stair**

The Escape Stair is used in case of medical issues once the aircraft has already left the parking position and for emergency landings for any evacuation without blocking the runway for hours or having the aircraft grounded to bring the slides back and certify them again. In addition, it could be used as a lifting platform for maintenance on airport lighting or the terminal. Even in a criminal event (e.g. hijacking), the police can access the aircraft as well.

Caption Needed.
APEX in Safety review in Africa with a sustainable growth

By Ermenando Silva, Manager, APEX in Safety, ACI World

The demand for Airport Excellence (APEX) in Safety reviews is growing, with requests from airports in the Africa region being no exception. The APEX in Safety Programme has proven to be an efficient tool for airports to identify safety gaps and appropriate mitigating measures. The programme is based on ICAO Standards and Recommended Practices together with ACI and worldwide best practices, and is carried out through capacity building in developed and developing countries.

During the first quarter of 2018, the APEX in Safety team conducted five airport reviews in Africa, starting with two in Mauritania (Société des Aéroports de Mauritanie), one in Namibia (Namibia Airports Company) and two in Nigeria (Federal Airports Authority of Nigeria (FAAN)).

The programme’s success and growth led to the launch of the APEX in Security Programme which applies a similar methodology to analyze airport security management procedures. Members are increasingly showing interest in undergoing both evaluations. This was the case with the Windhoek, Namibia Airport, which immediately requested an APEX in Safety review after hosting an APEX in Security review in December 2017.

The Federal Airport Authority of Nigeria (FAAN) also called upon the services of the APEX team on another occasion this year. After achieving national certification of the airports in Abuja and Lagos, and hosting APEX in Safety reviews, they reciprocated by hosting the first quarter reviews in Port Harcourt and Kano, and scheduled two more for the second semester at Enugu and Kaduna airports.

The APEX in Safety Reviews are carried out by a dedicated team of experts who provide an in-depth analysis, over the course of five days, of airport operational management and training needs. In conjunction with ACI Africa, we are able to call for tenders for the delivery of customized or standard training and support for all technical matters.

As airports improve safety through the APEX Programmes’ recommendations, the community of airports benefits from progressively building a safer network worldwide.

The APEX Team in Port Harcourt.
WORKING TOGETHER TO ENHANCE AIRPORT OPERATIONAL SAFETY

APEX in Safety is the industry leading peer review process to help drive improvements at your airport

website: www.aci.aero/apex • email: apexsafety@aci.aero
ACI and IATA’s NEXTT - Creating a common vision for the future of air travel

Q & A with Nina Brooks, Director, Security, Facilitation and IT, ACI World

WEBINAR INVITE
6 June 2018 - 2PM BST

What does the journey of the future look like? ACI and IATA’s NEXTT Vision brings together concepts and ideas that will transform the passenger and cargo journey over the next 20 years. This webinar is your first opportunity to contribute to that vision and help shape the future of air travel.

Register today: Building the journey of the future
Q: What is New Experience Travel Technologies (NEXTT) all about, and why was it created?

A: NEXTT will investigate how passengers, cargo, baggage and aircraft move through the complete travel journey with a focus on change in three areas: off-airport activities, advanced processing technology and interactive decision-making.

It came about after many conversations with IATA about how we could bring the industry together to scope out a vision to enhance the on-the-ground experience, inform industry investment and help governments improve regulatory framework – all in the effort to build the “journey of the future” in a sustainable and collaborative way.

Without industry players on board, helping to inform and inspire the programme, this initiative will not work. IATA and ACI decided to come together to encourage a collaborative approach to tackle challenges such as significant growth, evolving customer expectations and optimizing emerging technologies, processes and design developments.

Throughout 2018, we will host regular forums and workshops, and invite detailed feedback from airports, airlines and their partners, including a webinar hosted by the International Airport Review on 6 June 2018 and a face-to-face event to be held later this year.

Q: What technology advances would best support the needs of future airports and how far along are they in the development cycle?

A: We are considering the four main elements of a journey - the passenger, baggage, cargo and the aircraft turnaround.

Advanced processing and the digital transformation of airports involves both the implementation of new technologies and the integration of existing technologies, processes and services to deliver a better experience to all stakeholders.

Q: What recommendations are you making to member airports for implementation of NEXTT strategies, are NEXTT initiatives best implemented in phases, and what might those phases be?

A: Many of the concepts in the NEXTT vision are already being implemented or developed through ACI and IATA working groups and projects, such as Smart Security and One Identity. ACI’s initiatives such as our Digital Transformation best practice, SeamlessTravel using ACRIS standards and Airport Terminal Beacons are also part of the NEXTT vision. We are encouraging member airports to get involved in these initiatives and are also looking for airports’ feedback on future developments and innovative practices.

We will be hosting a session at our Annual General Assembly Congress and Exhibition in Brussels to discuss digital identity, and are looking forward to hearing about some case studies from airports leading in this field.

However, since no one airport is the same, different parts of the vision being more applicable in some parts of the world, we encourage airports to adopt initiatives and practices that best suit their operations. In addition, some of the components of the vision are using developing technologies that would be implemented later than those available now.
In terms of off-airport activities, we already see airports and airlines offering options for remote bag drop, and independent companies providing services such as baggage pick up and delivery. Many travel formalities are now completed remotely, online or through apps. This change does not necessarily require technology advances, but rather process innovation coupled with regulatory support.

Digital transformation is about business transformation - leveraging new technologies such as indoor geolocation, robotics, Artificial Intelligence, identity management, flow management, data mining and the Internet of Things (IoT) to support business needs. It is also about making these digital technologies secure in the cyber world to ensure that every system works as intended and data is protected.

**Q: Are there any technologies that you would like to see evolve faster before member airports would deploy them?**

**A:** A contactless process for the passenger is vital for an efficient airport operation and seamless journey. Digital identity is a key enabler of self-service and biometrics will play an important role in tomorrow’s journey. Biometrics have come a long way in a short space of time, and the technology continues to improve. Coupled with mobile technologies, this will be a powerful driver towards the NEXTT vision, but it will be critical to have interoperability between stakeholders and globally agreed standards.
TAKE YOUR PASSENGER SERVICE TO NEW HEIGHTS

PASSENGER PERSONAS

Every passenger is different, and airports that know who their passengers are can better cater to their wants and needs. Through extensive study and data analysis of ASQ Survey data, ACI has created an ASQ add-on based around six passenger typologies that will help you to:

- know what current and prospective customers are thinking and doing;
- highlight the passenger types that are most inclined to spend at your airport;
- help you understand the specific attitudes, needs, expectations and concerns of your passengers;
- address gaps in service and,
- benchmark your results with other participating airports.

ARRIVALS SURVEY

Participating ASQ airports can now take part in the add-on ASQ Arrivals Survey that offers vital learnings related to arriving passengers’ satisfaction levels. The ASQ Arrivals Survey takes place on the day of travel as passengers are in the airport, ensuring that impressions are fresh and opinions are accurate. The ASQ Arrivals Survey will:

- help you understand arriving passengers’ moods and impressions of the airport, from walking distances and washroom cleanliness to wayfinding, immigration, baggage claim and much more;
- help differentiate the key drivers of satisfaction among arrivals passengers, which can be distinct from the needs of departures passengers; and,
- give you the actionable intelligence to enhance your service offering to arriving passengers, and gauge the effectiveness of these enhancements.

Do not wait to take the next step in improving the customer experience journey at your airport.

Contact ACI’s ASQ team for more information by emailing aciasq@aci.aero.
Ensuring the security of the travelling public is a top priority for Airports Council International (ACI) and its member airports, and a prerequisite for a sustainable worldwide aviation system. The terrorist attacks in the landside areas of Brussels Airport and Atatürk Airport in Istanbul in 2016, and the shooting in the Fort Lauderdale–Hollywood International Airport in 2017, brought the security of the public areas of airports sharply into focus again for all aviation stakeholders, governments and the travelling public.

In 2017, ICAO introduced a new set of standards for landside security, as well as accompanying guidance material for States in the ICAO Aviation Security Manual (Doc 8973 – Restricted). To complement this guidance material and the guidelines developed by ACI EUROPE for airports, ACI World has drawn from best practices and examples globally in order to provide a comprehensive Landside Security Handbook for airports addressing this issue.

The handbook was launched at the Asia-Pacific Regional Conference in Narita, Japan, and includes best practices on issues such as assessing the security risk, preventing and deterring landside attacks, setting responsibilities, being prepared for and responding to incidents, recovery and communications, and the importance of leveraging the workforce to create a strong security culture. It also draws from the guidance recognized industry leaders and regulatory authorities on building and roadway design to deter, prevent and mitigate the impact of attacks.
Antoine Rostworowski, Deputy Director General, Programmes and Services launches the Landside Security Handbook at the ACI Asia-Pacific Regional Assembly and Conference.

The handbook is intended to help airports benefit from the experiences of others in ensuring that all aspects of prevention, deterrence and incident management have been considered in their own security programmes. It updates and brings together the best elements of managing security from current experience of those involved in this important task from airports around the world. Understanding that all airports face different threats and have distinct models of service delivery and the need for compliance with local regulation, each chapter suggests options and solutions that might be applicable.

The handbook was developed with generous input from experts from ACI’s members, Arup, ICAO, the UK Department for Transport, IATA, Lam Lha Consulting, BIRDe technologies LLC, Andrew McClumpha Associates, TH Airport Consulting, and the Centre for the Protection of National Infrastructure (CPNI).

All ACI member airports have received a free copy. Additional copies can be purchased at the ACI store.
The bigger get bigger while smaller airports suffer greatest loss

By Patrick Lucas, Head, Airport Business Analytics, ACI World

After years of consolidation and capacity discipline on the part of US-based airlines, North America has experienced an important resurgence in air transport demand, particularly at many of its large hubs. Much of this growth is indicative of greater airline market concentration and reduced competition symptomatic of the wave of airline mergers since the economic downturn in 2008-2009. In the US, four airlines handle a significant majority of domestic capacity—American, United, Delta and Southwest.

The widespread entry and expansion of point-to-point low-cost carriers in certain markets has heightened competition, offering affordable options to stimulate air transport demand. This is especially evident in Europe where their hubs continue to achieve growth well above what is expected for mature markets. Amsterdam (AMS), Frankfurt (FRA) and Paris (CDG) experienced growth of 7.7%, 6.1% and 5.4%, respectively, in 2017. From 2006 to 2016, compounded annual growth for European passenger traffic was 3.7% per annum.

The mega-hub markets

Urbanization and rising per capita income among large populations are also drivers of traffic growth, particularly at hubs in emerging markets. The Asia-Pacific region, which is home to many emerging markets, has the largest share of traffic for hub airports with 18 airports of more than 40 mppa, followed closely by North America with 16 mega-hubs (see Chart 1). In 2016, the 16 North American airports with over 40 mppa provided 34.7% of total traffic within the large hub category worldwide. Asia-Pacific’s large hubs have a 39.2% share of global traffic. Thus, 73.9% of large hub traffic is handled in North America and Asia-Pacific, rising to 95.2% if Europe is included. In 2016, Mexico City (MEX) surpassed 40 mppa, the first time an airport from the Latin America-Caribbean region has achieved this milestone.

While there were 18 airports with over 40 million passengers per annum (mppa) in 2006, this number had risen to a total of 46 airports by 2016. Collectively, these airports achieved passenger traffic growth of 5.5% year over year in 2016. This level of growth is unprecedented, particularly since a majority of the airports in this category are from the mature markets of North America and Europe.
In 2017, preliminary figures show that an additional 4 airports graduated to the 40 mppa category. These are Manila (MNL), Moscow (SVO), Tokyo (NRT) and XiAn (XIY).

**Chart 1:**
Number of airports with >40 mppa by region (2006–2016)

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**Smaller airports suffer greatest loss**

Despite the net gains that have been achieved in both traffic volumes and operational efficiency, especially at main hubs in major city markets across the globe, the downside of airline capacity shifts to these hubs is that some smaller regional airports have either stagnated or experienced a reduction in nonstop destinations between cities.

For example, the consolidation of operations by American carriers with a focus on more profitable routes and a strengthening of load factors has translated into gains in traffic at the largest hubs while smaller community airports have lost their share of traffic. A similar trend is observed in Europe where airlines have streamlined operations towards airports serving intercontinental routes within their established airline alliance model. It is important to highlight that the reason smaller airports remain in operation hinges on the fact that they contribute to the social and economic development of their surrounding communities. Strategies to ensure their sustainability are equally important in guaranteeing a well-rounded aviation system.

Based on a sample of 1,185 airports with available data across all throughput size categories, Chart 2 shows that a high proportion of smaller airports with fewer than 1 million passengers in 2006 experienced a decline in passenger traffic by 2016 compared with other size categories. By 2016, 27.4% of airports that had fewer than 1 million passengers per annum in 2006 experienced a loss in traffic. Chart 3 shows the corresponding breakdown by region, which reveals that a higher proportion of smaller airports lost traffic in Europe and North America (as a proportion of the number of airports in their size category in 2006).

**Chart 2:**
Proportion of airports that experienced a loss in passenger traffic volume by size category (2006–2016)
ACI’s recent **Policy Brief: Airport networks and the sustainability of small airports** presents business models and policy recommendations that facilitate the sustainability of smaller airports as part of a broader network of airports under the umbrella of a single airport operator.

The above article is an adapted excerpt from last year’s 2017 edition of the **World Airport Traffic Report**. For more detailed analysis and insights on air transport demand, please peruse ACI’s suite of products. With comprehensive data coverage for over 2,400 airports in 175 countries worldwide, ACI’s **World Airport Traffic Report** remains the authoritative source and industry reference for the latest airport traffic trends, rankings and data rankings on air transport demand. Boasting traffic forecasts for over 100 country markets, the **World Airport Traffic Forecasts (WATF)** dataset presents detailed metrics which include total number of passengers (broken down into international and domestic traffic), total air cargo and total aircraft movements. Absolute figures, compounded annual growth rates (CAGR), market shares and global growth contributions are presented over three time horizons: short-, medium- and long-term over the 2017–2040 period.
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Highlights from the 2nd meeting of the ICAO Technical Advisory Group on Traveller Identification Programme (TAG/TRIP/2)

By Jean-Sébastien Pard, Manager Facilitation and IT, ACI World

The Second Meeting of the Technical Advisory Group on the Traveller Identification Programme (TAG/TRIP/2) was held at ICAO headquarters in Montréal, from 24 to 26 April 2018. The TAG/TRIP is a technical group of qualified experts brought together to advance on the best means of implementation to build secure and efficient processes in border clearance operations.
These meetings bring together the best available experts to examine specialized problems and challenges, find technically feasible solutions and provide recommendations on guidance to reducing aviation security risk while improving efficiency at borders, thus building on one of the five key elements related to ICAO Traveller Identification Programme (TRIP) Strategy.

TAG/TRIP, through its New Technologies Working Group, focuses on technologies, including machine-based authentication such as e-gates and digital identity. The development of authentication systems has allowed for automated document authentication to become an integral part of border control infrastructures and processes, bringing efficiency and security to border control processes. Recognizing that technology has evolved rapidly, the group has issued a Request for Information (RFI) to keep abreast of new and improving technologies.

Another exciting development is the commencement of work on a purely digital token that would be used as a complement to ePassports. A hybrid model has been chosen as it provides States, travellers, border authorities and industry with several options in how they issue and authenticate identity. Security and interoperability are prime considerations. The group plans to have a globally agreed definition completed by 2020. Digital travel credentials in general were a hot topic during the meeting, highlighting the fact that despite the large number of ePassports issued worldwide (with chip validation and biometric verification), the document is still largely treated as a “traditional passport.” As a result, international passengers are often required to present their passport and/or boarding pass to the authorities up to five times at the airport before boarding an aircraft. Various initiatives and trials are underway, including One ID and the Known Traveller Digital Identity, which aim to streamline the passenger journey, creating a seamless, efficient and secure process and offering the passengers a frictionless airport process.
TAG/TRIP’s Implementation and Capacity Building Working Group focuses on building compliance with international standards for travel documents. The group completed work on the Guide for Assessing Security of Handling and Issuance of Travel, which has been published on the ICAO website, and a new ICAO TRIP guide on Evidence of Identity is in progress.

The ongoing need to develop biometrics guidance material related to the scope of the ICAO TRIP Strategy was also recognized. This will provide a high-level source of reference on the use of biometric technologies in all TRIP Strategy elements for the reference of ICAO Member States, to ensure complementarity and prevent any duplication of work.

ACI is looking forward to attending the next TAG/TRIP meeting in 2020 and to report on the latest evolution of technology in these fields.
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- Managerial or supervisory position in airport security
- Minimum of 1 year experience in the field of airport security

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Airport Security Operations

ACI-ICAO Management of Airport Security

Quality Management in Airport Security
The 13th ACI Asia-Pacific Regional Assembly, Conference & Exhibition was held from 23 to 25 April 2018 in Narita, Japan. The event, hosted by the Narita International Airport Corporation (NAA) and organized by ACI Asia-Pacific, welcomed over 500 delegates from over 40 countries. The event featured 50 speakers from around the world, covering a wide range of topics on airport business and operations.

The official opening on 24 April 2018 was attended by Kazuo Yana, Parliamentary Vice-Minister, Land, Infrastructure, Transport and Tourism of Japan; Wataru Takahashi, Vice-Governor, Chiba Prefectura; Makoto Natsume, President and CEO, Narita International Airport Corporation; and Seow Hiang Lee, President, ACI Asia-Pacific.

From left to right: Takashi Niino, President and CEO (Representative Director), NEC Corporation; Seow Hiang Lee, President, ACI Asia-Pacific; Wataru Takahashi, Vice-Governor, Chiba Prefectural; Kazuo Yana, Parliamentary Vice-Minister, Land, Infrastructure, Transport and Tourism of Japan; and Makoto Natsume, President and CEO, Narita International Airport Corporation.
Natsume thanked the distinguished guests and expressed NAA’s great privilege for the opportunity to host the assembly and extended their hearty welcome to the participants, as a prelude to Narita Airport’s 40th anniversary in May.

In wishing the participants a pleasant and fruitful assembly, Natsume invited them to experience the four pillar concepts of their airport: applying cutting-edge technology; preparing to host the 2020 Tokyo Olympics and Paralympics Games; supporting the promotion of inbound tourism; and strengthening Narita Airport’s competitive advantage and role.

He closed his welcome speech by stressing that the NAA will continue to place importance on the rapport with the various stakeholders and strive to offer an airport that is safe and convenient and chosen by its customer.

Also speaking at the official opening, Seow Hiang Lee, President, ACI Asia-Pacific, thanked the host, Narita International Airport, for their gracious hospitality and support. He also thanked delegates for their support in establishing the event as one of the signature events in the region, which brought together airports, airlines, regulators and industry associations from around the world. He anticipated that the two days of discussions and networking opportunities would generate innovative prospects for ACI members and business partners.
He also commented on the outlook of the industry and how Asia-Pacific, including the Middle East, is one of the fastest growing regions, characterized by its diverse economies and geography. He reiterated that ACI remained committed to maintaining and enhancing aviation safety and security, and would work closely with ICAO, regulators and industry stakeholders to address the challenges that lay ahead.

Kazuo Yama and Wataru Takahashi also warmly welcomed the delegates from around the world to attend this important aviation event in Chiba Prefecture.

A welcome reception held on 23 April 2018 also ushered in the official opening of the exhibition, which drew a record-breaking number of exhibitors, ranging from world-class airports to leading service providers and suppliers, and featured the latest products, services and technologies offered in the airport industry.

The next ACI Asia-Pacific Regional Assembly will coincide with the ACI World Annual General Assembly and will be held in Hong Kong from 2 to 4 April 2019, hosted by the Airport Authority Hong Kong.
Airport Council International Latin America-Caribbean (ACI-LAC) has developed a positive and collaborative relationship with the airline associations in the region.

Working with our sister organization, the Latin American and Caribbean Air Transport Association (ALTA), and the Miami-based regional office of the International Air Transport Association (IATA), will ensure that our priorities for the region, including security, taxes and Airport Collaborative Decision Making, are addressed.

Last year, at our board meeting, we entered into a Memorandum of Understanding (MoU) to work together on projects of mutual interest. At the board meeting held in April 2018, during IATA’s Wings of Change conference in Santiago, Chile, the parties, including the Director General of ACI World, met to discuss the priority areas to focus on for the coming year.

In the forthcoming weeks, staff for each organization will work on identifying specific projects within our priority areas. This will follow the successful model of MoUs and Annexes between ACI World and IATA headquarters in Montréal. While we all recognize that areas with the potential for differences of opinion will always exist, there are more areas of commonality between us. Working in concert, we can have an impact that will benefit our members as well as the travelling public.

During the board meeting, the main aspects agreed in the MoU were reviewed. This agreement established joint efforts to:

- improve aviation safety to achieve safety targets established by the Regional Aviation Safety Group – Pan America (RASG-PA);
- implement cost-effective security and facilitation measures, including new technologies designed to simplify business procedures and transactional processes;
- continue efforts to improve airport infrastructure and air traffic management initiatives for safe, efficient and sustainable operations;
- collaborate and share best practices on fuel supply and storage; and
- place aviation on government agendas to highlight the value of aviation as an engine of economic and social development.
In addition, Martín Eurnekián, President of ACI-LAC and ACI World Vice Chair, reiterated the need to maintain a permanent dialogue between stakeholders, regardless of the issues on airport charges and airport concession models, in which institutional differences of perspectives will remain.

He echoed ACI-LAC’s continuous commitment to seek opportunities for collaboration among key players in the aviation industry.

“The challenges imposed by the projected growth in passenger and cargo traffic, in the next 20 years in the region, demand a collaborative effort from the airlines to ensure the safe and sustainable development of the air transport system in the region,” he said.
ICAO Council Lunches

By Michael Rossell, Deputy Director General, External Affairs, ACI World

On the 2, 3 and 4 May 2018, ACI World was delighted to host a series of lunches for the International Civil Aviation Organization (ICAO) Council members, other ICAO State representatives and senior ICAO Secretariat. They represented countries from every corner of the globe: Algeria, Argentina, Australia, Brazil, Cabo Verde, Canada, Chile, China, Colombia, Cyprus, Ecuador, Egypt, India, Ireland, Italy, Japan, Kenya, Malaysia, Nigeria, Paraguay, Peru, Republic of Korea, Singapore, South Africa, Spain, Sweden, Turkey, Tanzania, United States, Ukraine and Uruguay.

Lunch came with a comprehensive briefing by the ACI World Director General, Angela Gittens, on ACI’s membership and function, which highlighted the vital role of the regional offices and the work carried out in terms of advocacy for the interests of airports and promoting airport excellence. She also emphasized the importance that airports attach to their relationship with the surrounding communities. As a final remark, Ms. Gittens underscored ACI’s role as the only global trade organization to represent the interests of airports, and its work to promote excellence through a wide range of tools, to collaborate
with other stakeholders and to advocate for the development of sound regulatory policy driven by data and objective analysis.

ICAO Council members are essential contact points between their States and the ICAO Secretariat—they set the policy for the organization through both regular meetings of the Council and the Air Navigation Commission, and also through informal discussions in the corridors of the building. By holding these briefings in an informal setting, we are able to cover a lot of ground in terms of ACI and airport’s priorities so that when it comes to lobbying, we are working with people we already know, and who know us.

For their part, it was evident that some Council members were already aware of ACI’s work and wanted to know more; others were completely new to ACI. All of them were engaged and asked intelligent questions, in particular about our certification of airports and how APEX could help; the role of ACI in developing SARPs; what might be done to improve wildlife management; how to address security issues such as inside threat; and the economics of small airports.

This initiative paves the way for the State of the Industry briefing to the ICAO Council on 12 June 2018 in which Ms. Gittens will present ACI’s views for the future of aviation. The briefing will focus on the need for efficient use of existing infrastructure, including having airports fully engaged in the slot allocation process, maximising the opportunities from the development of new infrastructure and the importance of land use planning, how to fairly distribute the costs of development and, not least, how to ensure that the industry works together to be a sustainable partner and neighbour.
# ACI Events calendar

June—November 2018

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<td><strong>ACI-NA BUSINESS OF AIRPORTS CONFERENCE</strong></td>
<td>11—13 June 2018</td>
<td>Portland, OR</td>
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<td><strong>28TH ACI WORLD ANNUAL GENERAL ASSEMBLY AND 28TH ACI EUROPE GENERAL ASSEMBLY, CONGRESS AND EXHIBITION</strong></td>
<td>18—20 June 2018</td>
<td>Brussels, Belgium</td>
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<td><strong>ACI CUSTOMER EXCELLENCE GLOBAL SUMMIT</strong></td>
<td>10—13 September 2018</td>
<td>Halifax, NS, Canada</td>
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<td><strong>ACI-NA ANNUAL CONFERENCE &amp; EXHIBITION</strong></td>
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<td><strong>THE TRINITY FORUM</strong></td>
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For a full listing of ACI events, please visit [www.aci.aero/events](http://www.aci.aero/events).
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ACI Events

Highlights: The ACI 10th Annual Airport Economics & Finance Conference & Exhibition

By Ilia Lioutov, Manager, Economic Policy, ACI World

This year marked the fourth joint Airports Council International (ACI)-World Bank Annual Aviation Symposium, which was held on 9 April 2018, preceding the ACI 10th Annual Airport Economics & Finance Conference & Exhibition.

The symposium highlighted the joint efforts of ACI and the World Bank to support the air transport industry and provided a forum to exchange knowledge and discuss developments in the sector. Prominence was given to the topic of Public Private Partnerships (PPPs) and, more precisely, how privatization processes are affected by the global economy, air transport trends and geopolitical instability.

The future of airports

One key element that was shared by all experts during the discussions is that private investors take significant risk associated with developing airports. The involvement of governments was also considered indispensable for successful airport privatizations in the form of robust project preparation from technical, legal, financial, environmental and social standpoints. Since privatization is a two-way process, several relevant topics were discussed, namely airport charges determination mechanisms, overall bankability and financial sustainability of a project and risk sharing mechanisms.

Airport traffic forecasting under uncertain conditions was another topic of discussion. As stated in the ACI World Airport Traffic Forecasts (WATF), global passenger traffic volumes are expected to grow at an average rate of 4.5% in the next 24 years, whereas emerging markets will be growing twice as fast as their developed counterparts. Several experts/speakers agreed that although a sound methodology, such as times-series and econometric analysis, was imperative, other approaches were needed to address a number of emerging trends that interfere with the conventional analytical frameworks. It was concluded that conflicting developments should be synthesized, operational and strategic forecasts should be reconciled, and projections should be regularly updated and amended.

Conference summary and key messages

The Airport Economics and Finance Conference opened on 10 April 2018 with keynote messages on the current state of affairs, potential business disruptors and the future of the airport sector.

The conference then focused on airport business from the perspectives of pure finance and economics. It also addressed airport competition dynamics, considering the increasing degree of airport competition across the globe. A session dedicated to the economic value of a slot elicited discussion on the effective management of the
Angela Gittens, Director General, ACI World

Celebrating the ACI 10th Annual Airport Economics & Finance Conference & Exhibition
current slot allocation system and the need to better utilize existing capacity and accommodate expansionary plans.

**ACI World partners with experts**

In light of the ongoing debate on the concept of airport networks, a full session, on the second day of the conference, was dedicated to this issue in relation to the economic sustainability of small airports, the mechanism of cross-subsidization and management synergies occurring within the airport networks in various parts of the world. Speaking from their own experience of managing large airport networks, the CEO of AENA (Spanish airport authority), the President of Aeropuertos Argentina 2000 (Argentinean airport operator) as well as the Director of Airports Authority of India (AAI), concluded that the network model is a viable and competitive option in the airport sector, generating value for its users and end-users. In addition, the discussion of airport networks has been strengthened by a case study on the recent privatization of fourteen regional airports in Greece and the subsequent developments in terms of capital expenditure and the evolution of user charges.

The ACI-World Bank Annual Aviation Symposium and the ACI Airport Economics and Finance Conference provided meaningful forums for discussion among top industry experts. In addition to drawing important conclusions, the need for a clear and consistent regulatory framework as well as sound government objectives in relation to the airport sector was highlighted.

ACI World and its longstanding partners – World Bank Group, ACI Europe and ACI Asia-Pacific - look forward to seeing you in London in March 2019 for the Symposium and Conference, and promise even more robust content as well as a more diversified cohort of speakers and experts.
Olivier Jankovec, Director General, ACI EUROPE and Patti Chau, Regional Director, ACI Asia-Pacific

From left to right: Olivier Jankovec, Director General, ACI EUROPE; Angela Gittens, Director General, ACI World; Charles Schlumberger, Lead Air Transport Specialist, The World Bank; Patti Chau, Regional Director, ACI Asia-Pacific; and Javier Martinez, Director General, ACI LAC

ACI World team during the Conference gala dinner
Key events and courses

Highlighted events and training
June—November 2018

ACI-NA Business of Airports Conference
11—13 June 2018
Portland, OR

ACI-LAC Annual Assembly & Conference
12—14 November 2018
Miami, FL

RUNWAY INCURSION AWARENESS & PREVENTION
23—25 July 2018
Montego Bay, Jamaica

28th ACI World Annual General Assembly and 28th ACI Europe General Assembly, Congress and Exhibition
18—20 June 2018
Brussels, Belgium

ACI-ICAO AERODROME CERTIFICATION*
16—20 July 2018
Montreal, Canada

*Can be taken as an elective for the Airport Management Professional Accreditation Programme (AMPAP)

For additional information please contact us at training@aci.aero
AIRPORT FINANCIAL MANAGEMENT
9—13 July 2018
Munich, Germany

AIRPORT SECURITY OPERATIONS
16—20 July 2018
Johannesburg, South Africa

AIRPORT MASTER PLANNING
23—27 July 2018
Incheon, South Korea

The Trinity Forum
31 October—1 November 2018
Shanghai, China

ACI Asia-Pacific Small and Emerging Airports Seminar 2018
10—12 October 2018
Training calendar

**Safety**

**GSN 4 - WORKING WITH ANNEX 14**
9—13 July 2018  Kuala Lumpur, Malaysia

**ACI-ICAO AERODROME CERTIFICATION***
6—10 August 2018  Montreal, Canada

**RUNWAY INCURSION AWARENESS & PREVENTION**
23—25 July 2018  Montego Bay, Jamaica

**GSN 3 - EMERGENCY PLANNING AND CRISIS MANAGEMENT**
6—10 August 2018  Kuala Lumpur, Malaysia

**APRON MANAGEMENT**
13—17 August 2018  Montego Bay, Jamaica

**FOREIGN OBJECT DEBRIS (FOD) PREVENTION**
Online

**Security**

**AIRPORT SECURITY OPERATIONS**
16—20 July 2018  Johannesburg, South Africa

**ACI-ICAO MANAGEMENT OF AIRPORT SECURITY***
23—27 July 2018  Montreal, Canada

**QUALITY MANAGEMENT IN AIRPORT SECURITY**
5—9 August 2018  Abu Dahbi, United Arab Emirates

**Customer Experience**

**PASSENGERS WITH REDUCED MOBILITY WORKSHOP**
17—19 September 2018  Kuala Lumpur, Malaysia

**DEVELOPING A CUSTOMER SERVICE CULTURE AT AIRPORTS***
1—5 October 2018  Bucharest, Romania

**MANAGING SERVICE QUALITY AT AIRPORTS**
8—10 October 2018  Montego Bay, Jamaica

**Economics**

**AIRPORT FINANCIAL MANAGEMENT**
9—13 July 2018  Munich, Germany

**ACI-ICAO USER CHARGES***
10—14 September 2018  Port of Spain, Trinidad and Tobago

**AIRPORT BUSINESS DEVELOPMENT AND PLANNING**
30 September—2 October 2018  Abu Dahbi, United Arab Emirates
Environment

**AIRPORT ENVIRONMENTAL MANAGEMENT***
17—21 September 2018  Panama City, Panama

**CERTIFICATE IN AIRPORT ENVIRONMENTAL MANAGEMENT***
Online

Leadership and Management:

**AIRPORT MASTER PLANNING**
23—27 July 2018  Incheon, South Korea

**AIRPORT HR MANAGEMENT**
23—27 September 2018  Abu Dhabi, United Arab Emirates

**AIRPORT COMMUNICATIONS & PUBLIC RELATIONS***
14—18 October 2018  Abu Dhabi, United Arab Emirates

**DIPLOMA IN LEADERSHIP ESSENTIALS**
Online

**CERTIFICATE IN PROJECT MANAGEMENT**
Online

Operational & Technical

**AIRPORT COLLABORATIVE DECISION MAKING (A-CDM)**
18—22 June 2018  Gimpo, South Korea

**AIRPORT COLLABORATIVE DECISION MAKING (A-CDM)**
12—16 August 2018  Abu Dhabi, United Arab Emirates

**AIRPORT COLLABORATIVE DECISION MAKING (A-CDM)**
1—5 October 2018  Port of Spain, Trinidad and Tobago

**AIRPORT OPERATIONS DIPLOMA PROGRAM**
Online

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*Can be taken as an elective for the Airport Management Professional Accreditation Programme (AMPAP)*

For additional information please contact us at training@aci.aero
Global Training

Photo Gallery

April 2018 Courses


Accident and Incident Investigation, 10-12 April 2018, Belgrade, Serbia
Wildlife Hazard Management and Prevention, 16-18 April 2018, Port of Spain, Trinidad and Tobago

Advanced Airport Operations, 16-20 April 2018, Kuala Lumpur, Malaysia
Global Training

Airport Human Resources Management, 16-20 April 2018, Bucharest, Romania

Aeronautical Studies and Risk Analysis, 16-20 April 2018, Munich, Germany

Airport Safety Management Systems Implementation, 23-27 April 2018, Kahului, Hawaii, USA
Behavioural Analysis: Passenger Screening and Insider Threat, 23-27 April 2018, Nairobi, Kenya

GSN 3: Emergency Planning and Crisis Management, 23-27 April 2018, Bucharest, Romania
Swissport International Ltd., on behalf of more than 850 client-companies, provides best-in-class airport ground services for some 265 million passengers annually, and handles approximately 4.7 million tonnes of air cargo at 133 warehouses world-wide. With a workforce of 68,000, the world’s leading provider of ground and air cargo services is active at 315 airports in 50 countries across all five continents. In 2017, the group generated consolidated operating revenue of EUR 2.8 billion.

AVIA have a widespread experience in the field of designing, executing, integration and maintenance of mega projects.

We serve our customers with highly skilled delivery teams and professional project management experts aided by established Quality Assurance (QA) and Quality Management Systems (QMS) to ensure the quality of the deliverable work. The QA/QC team consists of experienced engineers with QMS certification and conforms to ISO 9001:2008 international standards for the execution and implementation of the projects.
As a worldwide leader in global security services, GardaWorld’s highly trained and qualified personnel protect your business, your people and your assets when and where you need us most. Whether in a high risk conflict zone or ordinary day-to-day operations, GardaWorld’s security services are there to keep you safe. We work on behalf of our clients to manage reputation, enhance customer service, secure a safe workspace and allow employees and leaders to focus on improving daily operations.

BALE CONSULTING GMBH
Region: Africa
Level: Silver
Address: Scherbaumstrabe 33, 81737, munchen, Germany
Website: [www.i-sec.com](http://www.i-sec.com)
Contact: Fabian M Delfs, CEO
Email: f.delfs@bale-consulting.com
Phone: 0049 171 99 88 916

Bale specializes in aviation and railway consulting also in management for logistic and infrastructure projects. As a global player Bale has highly skilled consultants from different countries and projects around the world. We are customer oriented and have the best possible solution for our clients.

GW CONSULTING ME LTD
Region: Africa
Level: Gold
Address: Dubai International Financial Centre, Unit No. 2502, level 25, Currency House-Tower 2
Dubai, 482069
United Arab Emirates
Website: [www.garda.com/ips](http://www.garda.com/ips)
Contact: Caroline Passey, General Manager, Middle East and Africa
Email: caroline.passey@garda.com
Phone: +971 50 452 9285
TravelSky Technology Limited (the “Company,” or together with its subsidiaries, the “Group”) is the dominant provider of information technology solutions for China’s aviation and travel industry. The Group has been devoted to developing leading products and services that satisfy the needs of all the industry participants – ranging from commercial airlines, airports, air travel products and services suppliers to travel agencies, corporate clients, travelers and cargo shippers – to conduct electronic transactions and manage travel-related information. The core businesses of the Company include aviation information technology service, distribution information technology service, clearing and accounting and settlement service for aviation industry, etc.
**SUBWAY**

**Region:** Europe  
**Level:** Airport Related Business

**Address:** 325 Subway  
Milford, CT 06461  
USA

**Website:** [www.subway.com](http://www.subway.com)  
**Contact:** Wendy Barry, Global Account Manager  
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Daifuku Airport Technologies (ATEc) provides a broad range of solutions for airports and airlines, including baggage handling systems, self-service software and hardware solutions, baggage screening systems, specialized sortation control, ULD handling, software and controls and operational intelligence solutions. The business spans globally in collaboration with its group affiliates in Japan, the U.S., U.K., Malaysia, Australia and New Zealand.

**DAIFUKU CO., LTD. (JAPAN)**

**Region:** Asia Pacific  
**Level:** WBP Regular (Large)

**Address:** 1-2-3 Kaigan  
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Tokyo 105022  
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**Website:** [www.daifuku.com/jp](http://www.daifuku.com/jp)  
**Contact:** Adam Matheson, Executive General Manager  
**Email:** adam.matheson@daifukubcs.com  
**Phone:** +81 3 6721 3568
SOWAER SA - SOCIÉTÉ WALLONNE DES AÉROPORTS SA
Region: Europe
Level: Gold Member

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Contact: Peter Kohl, CEO
Email: lvu@sowaer.be

SOWAER oversees the development of Walloon airports. It manages interests held in the management companies. It invests in airport infrastructure and implements the environmental program.

TRANSINFRA PARTNERS LTD.
Region: Europe
Level: Silver Small Business

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Contact: Stuart Condie, Director
Email: stuart.condie@transinfra.uk

Transinfra Partners provide high value services for transport infrastructure assets to a wide range of customers including infrastructure or pension funds, transport owners and operators, potential purchasers or vendors of assets, and other multinational consulting practices. Transfinra has been advising global clients for the last ten years.
Founded in 2004, Gesnaer is a Spanish engineering and consultancy company specialized in civil aviation, airport, air navigation and aeronautical fields. With the ambition and professionality acquired, we are focused on maintaining quality standards that makes us one of the leading companies in the industry.

For decades, Vitra has dedicated itself to the topic of sitting. This naturally includes time spent in public spaces – illustrated quite clearly by the fact that Vitra has had the waiting area seating system Eames Tandem Seating as a part of its product portfolio since 1962. Thanks to the broad spectrum of products, visitors to waiting zones as well as users of other areas can benefit from the ergonomic and design quality of Vitra’s products: from the airport gate to customs, security clearance and luggage check-in, and from restaurants, lounges and shopping areas to back offices and control centre areas.
**SUBWAY**
Region: Latin America-Caribbean
Level: Affiliated

Address: 325 Subway
Milford, CT 06461
USA

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The SUBWAY restaurant chain has global recognition with over 44,000 restaurants in over 110 countries. The SUBWAY restaurant chain also offers upscale decor, flexible floor plans and can provide airport passengers and employees a full menu of sandwiches, soups, salads, breakfast, cafe items and snacks with 24-hour operations.

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**XSIGHT SYSTEMS INC.**
Region: North America
Level: Silver

Address: 1400 Racetrack Road
Alexandria, KY
41001

Website: [www.xsightsys.com](http://www.xsightsys.com)
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Xsight Systems is the provider of advanced runway sensor solutions chosen by leading airports worldwide and fully compliant with FAA regulation. For the first time in aviation history, our runway solutions present a new paradigm in Runway Management and allow constant command over airport runways and their surroundings.
The Grove has grown from “Just Nuts” to include products that serve more customers. Menus are tailored to meet the needs of the airport and consumer base by offering a wide variety of premium food and beverage choices. The Grove is a certified DBE with award-winning customer service, first class operations, outstanding partnerships and exceptional designs. The Grove currently operates at thirteen U.S. airports, including Atlanta, Chicago, Dallas/Fort Worth, Boston and JFK.

Nieuport Aviation owns and operates the passenger terminal at the award-winning Billy Bishop Toronto City Airport. We are a consortium of long-term infrastructure owners and operators with a deep local presence, significant international expertise in managing aviation infrastructure, and a commitment to world-class customer service. Our partners include InstarAGF Asset Management, Partners Group, institutional investors advised by J.P. Morgan Asset Management, and Kilmer Van Nostrand Co. In addition to managing the terminal, Nieuport Aviation offers passengers a free bus shuttle service between the airport and downtown Toronto, helping to provide a seamless travel experience. Nieuport Aviation works closely with PortsToronto, the owner and operator of Billy Bishop Toronto City Airport, and the airport’s other stakeholders to deliver an exceptional passenger experience.
237 accredited airports

- 34 in North America
- 133 in Europe
- 44 in Asia-Pacific
- 16 in Latin America & Caribbean
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