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Airports Council International
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Republic of Panama

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Morocco

ACI Europe
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Belgium

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China
Overall satisfaction

Passengers' overall satisfaction level remains stable since the beginning of 2018 and is higher compared to Q3 2017.

In 2017, the third quarter showed the lowest level of overall satisfaction in comparison with other quarters of that year. In 2018, airports have been able to maintain the level of satisfaction and a significant increase compared to Q3 2017 is observed. Scores have improved for most regions and airport sizes, especially in Middle-East region and amongst middle-sized airports (15-40mppa).

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<th>Region</th>
<th>Q3 2017</th>
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<td>NORTH AMERICA</td>
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Results are means on a 5-point scale. Indicates that the segment’s performance is higher or lower compared to the Q3 2017 result on a statistically significant level (95%).

Source: ACI Airport Service Quality Departures Programme 2017-2018
With the continued increase in global traffic and the need to accommodate new and larger aircraft, it has been a challenge for airports to maintain efficiency while at the same time ensuring that they continue to meet the highest safety standards. This year, the ACI World Safety and Technical Standing Committee continued its efforts to respond to this challenge through contributions and interactions with ICAO on airport matters.

Today, airports are part of a global network within which the safety and sustainable performance of one airport may affect the safety and performance of other airports. Airports benefit their customers and their communities when they exercise best practice in operational management. Our members have traditionally been willing to assist other airport operators and this engagement is not diminished by the increased competition among airports.

In an important step forward, the ICAO Air Navigation Commission approved a set of amendments to the aerodrome design standards in Annex 14, which would change the international standards and recommended practices for runway width, taxiway width, and runway to taxiway separation. This will take effect in a few days, on November 8, 2018. These amendments enable Code F aircraft to be used at existing Code E airports with few changes to infrastructure. This will have an enormous effect, saving construction costs, reducing operating restrictions and increasing operational efficiency. Other airports
will benefit too, for example, from reduction of the minimum runway strip width for all aircraft with a main landing gear span of over 9 metres.

ACI has been aggressively advocating for these amendments and thanks its members for their support. These efforts will pay off as ICAO member states implement them in their regulations.

To date during 2018, member airports and ACI World staff represented airport interests in ICAO symposiums, notably the Thirteenth Air Navigation Conference which took place in Montreal from October 9 to 19 and covered the theme “From Development to Implementation”. It included discussions about the implementation of operational improvements, such as technology, operational concepts and roadmaps, from the conceptual phase until deployment. ACI presented five working papers and all of them were accepted for debate and their recommendations were adopted. These recommendations are addressed to ICAO and its member states and cover subjects from aerodrome safety and efficiency to ground and airspace capacity, as well as emerging issues such as cyber resilience, traffic management for drones (UTM), regulations for remotely piloted aircraft systems, new generation supersonic transports and commercial space transport, which will affect airports. ACI also obtained clear and welcoming endorsements of the APEX in Safety programme and the joint ACI-IATA NEXTT initiative (new experience travel technologies).

Members have also recently discussed current and emerging airport issues and ACI World has recently released a number of guidance document:

The ACI Template for **Ground Handling Service Provider Agreements**: From 2013 ACI’s World Governing Board and ACI regions have taken up the issue of a policy framework to help members address the complex issues involved in ground handling, to resolve safety and regulatory challenges to airports without neglecting the efficiency and commercial viewpoints of airlines. The majority of ground handling activity worldwide is now carried out by independent ground handlers under contract to airlines, and these ground handlers are largely unregulated. As the industry becomes more receptive to reviewing traditional silos and holistic approaches to safety, and as airport operators have become more attentive to performance in the entire airport platform, it is timely to discuss the boundaries of airport management attention over third party performance in ground handling.

The **Drone Policy Paper**: aiming to help airports respond to the rapid growth of the drone and Remotely Piloted Aircraft Systems (RPAS) market worldwide. Drone operations are expected to soon surpass the number of manned aircraft operations and airport operators have a vested interest in the development of regulations and standards that determine how drones will be integrated into the aviation system. This policy document aims to ensure that useful drone operations are facilitated without negative impact to the safety, security, efficiency or capacity of airport operations.

The World Governing Board has also agreed on a Resolution urging members to submit safety data to ACI. Appreciating the importance of safety data for airport operators in the context of the requirement for airport operators to have a Safety Management System under ICAO Annex 14 (Aerodromes) and 19 (Safety Management), this will allow us to support
a strong focus on safety data and information that should lead to improvements in airport safety.

Through our training curriculum and the Global Safety Network (GSN) Diploma Programme, we will continue to provide members with specialized courses on airport safety specifically designed to meet the needs of airside operations and safety managers, including developing, implementing and operating effective Safety Management Systems (SMS) at their airports.

Finally, 18 safety reviews have been conducted to date in 2018 – eight in Africa, six in North America, and four in Asia-Pacific. We will pursue our efforts in promoting safer airport operations and cooperation between through the programme in order to achieve our planned objective of 20 reviews by the end of the year.

Clearly, all this would not have been possible without the engagement of the members of the WSTSC, representing all regions of the world. ACI World cannot rest on its laurels as 2019 promises to be another challenging year with ICAO adopting a series of amendments to the Annexes to the Chicago Convention which have significant benefits to airports and ACI will strongly support their implementation.

Looking forward, ACI affirms its commitment to its members and will continue to participate in activities that serve to promote the overall operational safety and managerial excellence of airports worldwide, and those activities to include board and committee work, peer reviews, knowledge sharing through conferences and seminars. We are committed to contribute resources and expertise to “leave no airport behind” through such programmes as the Developing Nations Assistance Programme and the Airport Excellence (APEX) Programmes.

To this end, ACI will continue to strengthen its ability to facilitate knowledge sharing and to broaden the community of airports worldwide in order to ensure the safety of air travel.
SAVE THE DATE

2019 ACI Asia-Pacific/World Annual General Assembly, Conference & Exhibition

2 - 4 April 2019

HONG KONG
Changi Airport Singapore: Imagineering passenger experience
More than 62.2 million passengers passed through Changi Airport in 2017, and many have come to appreciate the care and attention that the airport has taken to design its terminals, as well as to curate its leisure and entertainment facilities.

With a wide array of facilities such as a rooftop swimming pool, cinemas, at least one garden in every terminal, the world’s tallest airport slide, complimentary internet access and even a Free SingaporeTour, passengers are provided with plenty of options to spend their time during long layovers. Family-friendly amenities are also available for those travelling with children and infants.

The airport understands that the key to creating good passenger experience, or what it has termed as the “Changi Experience,” is by
placing passengers and customers at the heart of everything it does. By understanding and anticipating passengers’ needs and wants, Changi is able to deliver them, even before passengers asked for them.

While the airport admits that keeping the “Changi Experience” fresh is an ongoing challenge, it is determined to innovate and ensure that a visit to Changi Airport will never be boring.

**Terminal 4**

Changi’s new Terminal 4 (T4), which started operations on 31 October 2017, is in many ways, a good illustration of Changi’s determination to innovate and strive for the better.
T4 is fitted out with the entire suite of Fast and Seamless Travel (FAST) self-service options, from self-service check-in and bag-drop, through to immigration, and on to self-boarding gates. Together with facial recognition technology, which eliminates the need for manual identity verification by staff throughout a passenger’s departure journey, T4 has been designed to be one of the most modern and high-tech facilities in the Asia-Pacific region.

Introducing self-service options does not mean that the airport is doing away with customer service. In fact, self-service options will enable Changi Airport and its ground handling companies to optimise manpower resources required for traditionally labour intensive processes, and free up time for staff to continue to deliver a first-class
Changi Experience, to assist passengers who may be in need of help.

In addition to self-service options, Changi believes in rethinking travel. T4 is designed to deliver a new level of theatrical experience with its immersive walls. The first immersive wall at the centralised security screening area is designed to provide a stress-free security screening space, while the second wall at the Heritage zone displays Changi’s first digital theatre production, to showcase Singapore’s local culture.

These special design elements of T4 enable it to handle two thirds of Terminal 3’s passenger capacity, while only being half the size. This capacity is needed to accommodate traffic growth at Changi, to ensure that the airport has sufficient capacity to meet the expected passenger growth projections, until Terminal 5 is completed in the 2030s.

With Terminal 4 having started operations smoothly, the airport’s focus is now getting Jewel Changi Airport to meet the world in 2019, as well as developing Terminal 5.
Jewel Changi Airport

Jewel Changi Airport - a mixed-use complex featuring attractions, retail offerings, a hotel and facilities for airport operations, is taking shape in front of Terminal 1. Strategically located in the heart of Changi Airport, Jewel is envisaged to be a world-class lifestyle destination that will enable the Singapore air hub to capture passenger mindshare, and strongly boost Singapore’s appeal as a stopover point for travellers.

Built on a 3.5-hectare site, Jewel will boast a plethora of shops, restaurants, gardens and a 130-room hotel centred around the world's largest indoor waterfall at 40 metres. Created to be a world-class attraction, Jewel Changi Airport is a game-changing project for Changi, in today’s highly competitive landscape, as the airport continues to strive to create a Changi Experience that touches the heart of every passenger.
Maintaining the passenger experience at airports under increased landside security requirements

By Torsten Hentschel, Managing Director, TH Airport Consulting

Figure 1. Passengers Queue at an Airport’s Landside Source: TH Airport Consulting
Sparked by Ever-Growing Landside Security Needs, Airports Tend to Neglect the Passenger Experience:

Time for Airports to Rethink how to Secure their Publicly Accessible Areas while Maintaining the Passenger Experience

It seems that airport visitors increasingly tempt their fate as international terrorism targets the airports’ vulnerable public spaces. International organizations, with the International Civil Aviation Organization (ICAO) leading the way, have painfully visualized the ever-growing landside threat. In order to mitigate the identified risk and to prevent possible acts of unlawful interference, all ICAO Member States are obliged to ensure the thorough definition of any vulnerable landside area and likewise the establishment and coordination of suitable security measures. Security measures may, however, impinge on the privacy, flexibility or dignity of passengers. The major question then is how to achieve both, the sought-after increase in overall security and the maintenance of the passenger experience at the same time. A research study conducted with TH Airport Consulting reveals the necessity to implement landside security initiatives with due regard to psychological effects on passengers.

Security comprises both objective parameters and subjective security feelings of passengers. Suitable measures on enhanced landside security were defined on the basis of interviews conducted with 10 international airport security experts. Those measures had been subject to evaluation by 300 participants of a comprehensive online survey.

Security is a basic passenger need. Perceived security correlates with gender, age, type of measure and the number of persons present in a particular situation. Police patrols and general camera surveillance tend to make people feel more secure. Intrusions with regard to standard observation measures are accepted most. Security initiatives resulting in losses of flexibility, anonymity and dignity of passengers are accepted least. People are risk-averse. An approach to win customers’ confidence is the provision of uniformed visible
Security patrols, the installation of not-too-obscure technical solutions and the allocation of information on benefits and meaningfulness of particular measures. Pre-terminal checks or veracity testing are perceived negatively while initiatives revolving around behaviour detection are welcomed.

To maintain the passenger experience under increased landside security requirements, the implementation responsibility should be shared within a joint approach led by the airport’s security and operation departments. Optimized layouts should be planned so that they provide space to avoid congestions and to facilitate passenger flows. Processes should commonly follow non-intrusive concepts, leaving passengers in the awareness that somebody is constantly watching and prepared to interfere.

In conclusion, the more a security measure is accepted, the better it maintains the passenger experience. Passengers and their perceptions ought to be in the heart of the airport business rather than being left in the dark about the existence and purpose of the security measures.
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APEX is going green

By Danny Boutin, Senior Manager, APEX Programmes, ACI World
Since its inception in 2012, ACI’s Airport Excellence (APEX) Programme in Safety has been recognized in the industry as a successful peer-review initiative which promotes airport excellence in operational safety management. The success of APEX in Safety allowed the expansion of the programme to APEX in Security, which was officially launched last year in Mauritius during the ACI World Annual General Assembly, Conference and Exhibition.

This year, the APEX Programmes stepped further in endeavouring to support member airports’ pursuit of operational excellence by commencing a pilot programme on airport environment management. Detailed assessment criteria and manual were developed in line with ACI guidance material, ICAO documents, ISO standards and others. In addition, lessons learned from an internal exercise last year between Zurich Airport (ZRH) and Bogota El Dorado International Airport (BOG) on an environment management assessment, which ACI had the opportunity to observe, were also used to support the development of the pilots. The ACI World Environment Standing Committee (WEnSC) created a task force to develop and further shape the programme with the leadership of current and past committee chairs, Kristi McKinley (Oakland, US) and Emanuel Fleuti (Zurich, Switzerland).

The first pilot review was hosted last July at the Mariscal Sucre International Airport (UIO) in Quito, Ecuador. With strong support from the UIO executive team, environmental and social management practices were reviewed by industry leaders from across three continents, laying strong groundwork for the official launch of the programme.

Only a month later, the second pilot review was conducted at Indonesia’s Adisumarmo International Airport (SOC). With a proven track record of eight successful APEX reviews over the past two years, the airport operator, Angkasa Pura 1 (AP1), showed keen interest in shaping a new programme. Officials from SOC demonstrated great creativity and openness in taking the recommendations from the review team to further optimize their process.

It was evident from the first two pilots that the APEX environment management review not only encouraged the host airports to assess their practices and address potential gaps, but also the industry reviewers – who themselves are industry peers – to share the insights, reevaluate their approach, and learn from the creativity and solidarity of the host airports. The two pilot reviews benefitted from the support of experts from Zurich, Port of Oakland, Hong Kong and Brisbane international airports. The pilot programme will now be evaluated by the WEnSC to enrich the content and scope of the review. More pilots are expected throughout 2019 to further enhance the programme.
Highlights of the 10th Meeting of the ICAO Facilitation Panel

Jean-Sebastien Pard, Manager Facilitation and IT, ACI World
The tenth meeting of the Facilitation Panel (FALP) meeting was held at the International Civil Aviation Organization (ICAO) headquarters in Montréal from 10 to 13 September 2018. The panel, established in 1995, plays a critical role in the accomplishment of the Facilitation Programme’s priorities, as it ensures that Annex 9 to the Chicago Convention is kept current. The FALP, which is currently composed of experts nominated by thirty-two Member States, as well as ACI and IATA as permanent observers, provides expertise in the development of new or revised Standards and Recommended Practices (SARPs), complemented by guidance material.

This meeting was an opportunity for ACI to advocate for regulatory support for best practices in border controls, customs and health-related matters, taking into account the needs of airports, especially in light of growing passenger numbers and pressure on current and future airport infrastructures.

ACI submitted, co-signed and/or supported papers that presented a series of recommendations and the need for greater collaboration on subjects such as aviation sustainable growth, combating human trafficking, integrated identity management solutions and greater accessibility in the air transport industry.

The panel considered two new Recommended Practices for Annex 9 that supported the efforts of ACI along with the air travel industry in the fight against human trafficking. These new Recommended Practices, including provisions related to awareness raising and a real-time reporting mechanism, have been included in the report submitted to the Chairperson of the ICAO Air Transport Committee.

Finally, there was also broad support on the proposal to improve training, through the development of guidance material — particularly *The Facilitation Manual* (Doc 9957) — and training programmes in the field of facilitation. ACI expressed interest to participate in the complete review of Doc 9957 that will be led by the Working Group on Guidance Material (WGGM). This review shall be completed for the next Facilitation Panel meeting scheduled for May 2021.
ACI World Airport Traffic Forecasts (WATF) 2018-2040: A toolkit to navigate the future

Air transport forecasts are crucial for airport planning and the determination of future capacity requirements. Because infrastructure projects are costly and often disruptive, a data-driven understanding of future demand — such as the expected number of aircraft movements, passenger traffic throughput and air cargo volumes — gives airport planners and investors the necessary information for effective decision making. While short- and medium-term forecasts are typically used for operational and budget reasons, long-term forecasts feed into strategic planning and investment decisions. Thus, irrespective of the element of uncertainty with future outcomes and events, forecasts are still required to understand various scenarios, all other things being equal. The ACI World Airport Traffic Forecasts 2018-2040 is thus an indispensable resource in this regard.

Boasting traffic forecasts for over 110 country markets, the WATF dataset presents detailed metrics which include total passengers (broken down into international and domestic traffic), total air cargo and total aircraft movements. Absolute figures, compound annual growth rates (CAGRs), market shares and global growth contributions are presented over three time horizons which include short-, medium- and long-term forecasts over the 2018–2040 period. Long-term forecasts factor in both demographic and economic variables. In addition to global forecasts, regional estimates have been developed for Africa, Asia-Pacific, Europe, Latin America-Caribbean, Middle East and North America.

Airport traffic projections are also presented for major economic groupings such as emerging versus advanced economies, BRICS (Brazil, Russia, India, China and South Africa), G7 (Canada, France, Germany, Italy, Japan, the UK and the US), MINT (Mexico, Indonesia, Nigeria and Turkey) and more. The WATF is distributed in a standard EXCEL format and includes analyses, summary tables, predicted rankings and charts as well as the full dataset of forecasts. For a detailed understanding of the methodologies used to produce the forecasts, please refer to the ACI Guide to World Airport Traffic Forecasts.

The ACI World Airport Traffic Forecasts 2018-2040 will be released in November and will feature all the above and more. Visit our store page to pre-order your copy today.
Europe’s air transport industry – Eastern Europe emerging as major contributor to growth in the last decade

By Patrick Lucas, Head, Airport Business Analytics, ACI World; Aram Karagueuzian, Manager, Airport Traffic and Forecasts, ACI World; and, Michaël Simard, Data Analyst, Economic Statistics, ACI World

Europe passenger traffic growth: 2016–2017 % change
After years of lacklustre performance caused by a series of debt and currency crises, Europe became a major contributor to the global economic resurgence in 2017. The region achieved a broad-based economic recovery with GDP growth of over 2.0%, among its highest GDP growth rates in a decade. Hastened by strong business and consumer confidence, many industries prospered in 2017, further supporting the multiplier effect in trade and industrial production. In particular, the aviation sector posted one of its strongest year-over-year gains ever.

Expansion in international traffic on long-haul segments between Europe and other regions such as Asia and the Middle East was also apparent in 2017. Growing impetus for the long-haul low-cost business model, especially on transatlantic segments, represented an important industry evolution. The blurring or hybridization of business models between traditional full-service carriers and low-cost carriers continues to be an important development in the industry, especially in European markets. As a symptom of this new, game-changing environment, 2017 saw a significant number of airline bankruptcies and a wave of consolidation. At the same time, continued inroads by incumbent low-cost carriers in the intra-European market such as Ryanair, easyJet, Wizz Air and Jet2, among others, show the resilience of this business model in certain market segments. Within Europe, routes linking London Gatwick (LGW) and Paris Orly (ORY) with Spanish destinations such as Barcelona (BCN) demonstrated both high traffic volume and significant year-over-year growth. The long-haul


Source: ACI World Airport Traffic Database, 2018
route between London Heathrow (LHR) and Hong Kong (HKG) continues to experience robust traffic.

Despite the reassurance provided by strong macro-economic fundamentals, uncertainty and downside risks for the European single aviation market remain a major concern leading into 2019. The UK’s exit from the EU begs the question of what impact changes in that large aviation market will have on the European market and aviation in general. Irrespective of these downside risks, the UK achieved 5.9% air passenger traffic growth in 2017, well above its average annual growth over the last decade. In fact, an analysis of Europe’s top 20 country markets shows that median growth in 2017 was 8.2%, which is above the compounded annual growth rate of 4% for Europe as a whole. After weak traffic numbers in 2016, Turkey (+11.2%) and Russia (+16.7%), respectively the fourth- and fifth-largest European markets in 2017, recorded notable rebounds.

**Eastern Europe’s record-breaking growth**

Airports located in Western and Southern Europe continue to handle a significant proportion of European passenger traffic. These sub-regions accounted for 64% of the continent’s traffic; their average growth rates since 2000 have been 2.8% and 4.8% per annum respectively.

Eastern Europe is turning into a major player in the region, however. Although the sub-region only represented slightly more than 14% of Europe’s total traffic in 2017, record growth in its air transport industry is gradually increasing its

![Chart 2: Evolution of passenger traffic in Europe’s regions (2000–2017)](chart2.png)
countries’ importance in the continental market. Eastern Europe’s airports have achieved the highest average annual passenger traffic growth in Europe this century. From 2000 to 2017, airports in Eastern Europe achieved average growth rates of over 10.1% per annum, as noted in Chart 2. This is largely attributable to the fast growth of major commercial airports in Russia, but other burgeoning markets – such as Poland, Romania and Ukraine – have become contributors to this growth. Passenger traffic growth between 2016 and 2017 reached double-digit for every single country in the sub-region.

Revival in European air cargo

Before 2016, the region’s air cargo market had experienced very little change in overall volume since 2010, which coincided with the rebound after the Great Recession. While 2016 was considered a recovery year, 2017 saw an 8.6% increase, one of the largest volume growth rates of all regions. Many of Europe’s major air cargo hubs saw significant volume gains in 2017, well above their average annual growth rates for the past 20 years. Certainly, a weakened Euro against the U.S. dollar and Chinese Yuan helped bolster external demand for cargo shipped from the monetary union.

Germany, Europe’s largest economy and manufacturing centre, handled the highest proportion of the region’s air cargo. Volume handled by the country’s airports grew 6.7% to 4.9 million tonnes of air cargo. Even cargo volume from the UK, which continues to be spooked by the uncertainty surrounding Brexit, leapt 9.1%.

![Chart 3: Evolution of air cargo traffic in Europe (2000–2017)](chart_3.png)

Source: ACI World Airport Traffic Database, 2018
Air cargo grew 2.1% on an annual basis from 2000 to 2017, as seen in Chart 3. Turkish airports in particular saw the greatest gains and in 2017 achieved 20.4% growth, one of Turkey’s largest year-over-year increases. In 2016, Turkish airports saw overall volume rise 14.7%, which indicates that throughout the period air cargo flows were less sensitive to geopolitical and security concerns than was passenger traffic. Other major air cargo countries which achieved double-digit-percentage gains were Spain (+14.1%), Luxembourg (+12.0%), Russia (13.2%) and Switzerland (+10.7%).

**Europe Outlook 2018 – Robust growth in 2018’s first half amidst downside risks**

Europe maintained its robust growth trend through the first half of 2018, achieving 6.7% growth for the six months. Although the current trend points toward a slowdown in the second half of the year, overall growth for the year should be above 5%. A developing trend in the region for 2018 is the emergence of peripheral countries (in Eastern and Southern Europe, as well as the Baltic States) as major growth centres for European aviation. The increasing prevalence of low-cost carriers in those markets, together with improving economic conditions, have propelled the European market significantly in the recent year. Even though a backdrop of uncertainty is hanging over the aviation market, brought on by the prospective withdrawal of the UK from the European Union, aviation in Europe should remain unfettered in the short term.

The UK, Europe’s largest aviation market, experienced subdued growth in the first half of 2018. Although the UK market grew by a robust 5.9% in 2017, its growth slowed to 2.2% in this year’s first six months. UK GDP is projected to grow 1.6% by the end of the year, below France and Germany’s respective 2.1% and 2.5% projected rates. As difficult negotiations on the details of the UK’s exit from the EU continue, the country is still facing a high degree of economic uncertainty.

Spain’s passenger market grew 6.8% in the first half of 2018. The country’s domestic segment, which represents about a third of its total market, drove much of the increase, growing 11.8%. The international segment also grew during the period, but at a more moderate 4%. Madrid Airport (MAD) had a particularly good run up to June, its traffic growing 8.2% in the year’s first six months.

German airports’ passenger traffic grew at the same 2.2% pace as did the UK airports in the first half of 2018. The country’s domestic segment saw traffic decline during the period, following a particularly strong year in 2017. The collapse of Air Berlin was responsible for the domestic passenger traffic decline. Dusseldorf Airport (DUS) typified the trend, its domestic traffic falling 13.2% over the six months, contributing to an 8% decline in its total passenger traffic for the period. Frankfurt Airport (FRA) escaped the domestic traffic downturn unscathed, thanks to the continued strength of its inter-European traffic, and posted a 9.1% traffic increase for the period.

Turkey’s passenger market suffered major setbacks in 2016 but managed to start recovering momentum in early 2017. The country’s major airports saw their combined passenger traffic grow 16% in the first half of 2018. Turkey’s three largest airports, located in Istanbul and Antalya,
surged during the period, growing 12.9% (IST), 12.4% (SAW) and 25.2% (AYT) respectively. Recent news regarding the national economy leave the second half of the year under a cloak of uncertainty, however. The Turkish lira has tumbled in international markets as inflationary pressure remains on the rise.

The Russian Federation’s GDP growth is set to rebound this year after a two-year contraction. The country’s passenger market had already begun recovering in 2017, growing 16.7% for the year, and grew another 11.1% in the first half of 2018. Given the current passenger traffic growth trend in Eastern Europe, against a backdrop of a macroeconomic recovery and slowly rising commodity prices, there is a good chance the Russian Federation’s traffic growth for the full year of 2018 will remain in the double digits.

France gained more ground in the first half of 2018 than its regional peers Germany and the U.K., posting 4.1% traffic growth for the period. Among the major European markets, Italy performed relatively well in the first half of 2018, its traffic growing 6.1%. Milan’s Malpensa Airport (MXP) provided a significant portion of this growth, achieving 11.1% growth for the first half of the year.

For more detailed analysis and insights on air transport demand, please peruse ACI’s suite of products. With comprehensive data coverage for over 2,500 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.
ACI holds the inaugural Customer Excellence Global Summit in Halifax, Nova Scotia

By Ajayi Ibukunle, Administrative Coordinator, ASQ, ACI World

ACI World had its combined international ASQ Forum and inaugural Customer Excellence Global Summit, which is dedicated to sharing and exploring industry best practices in delivering the best airport experiences for passengers.

The Summit, which was hosted by Halifax Stanfield International Airport, took place from 10-13 September 2018 and was organized around the theme of “delivering the best experience.” Halifax Stanfield International Airport was selected to host the inaugural Summit based on the numerous ASQ Award accomplishments, being one of the top airports in delivering high level of passenger satisfaction.

The Summit welcomed over 450 delegates from 157 airports in 59 countries and featured guest keynote speakers, Shashank Nigam, Founder and CEO, SimpliFlying and Brian Shapiro, President, Shapiro Communications. The programme also featured discussion panels moderated by international subject matter experts.

The Summit was home to the annual ASQ Awards ceremony. The awards recognize the top performers in customer service across the world, and it is a true celebration of the airport industry’s commitment to enhancing customer experience. The ASQ programme is the world-renowned and only globally-established benchmarking programme measuring passengers’ satisfaction who are travelling through airports.

“The ASQ Awards ceremony celebrates our industry’s commitment to delivering exceptional customer service to passenger service,” said Angela Gittens, Director General of ACI World. “The awards ceremony and the Global Summit are special opportunities for the airport community to network, exchange best practices and celebrate the devotion to our customers. I congratulate all the winners for their accomplishment and for serving as role models in pursuing customer service excellence.”

The awards honoured the achievements of airports in 2017 and included 15 first-time winner airports. These results confirm that competition is now a fixed feature of the industry, and that airports, regardless of their size, operate in an increasingly commercial and competitive business environment encouraging them to make the passenger experience a top priority.

Announcement to follow on the date and location for the 2019 ASQ Forum and Customer Experience Summit.
Highlights during the international ASQ Forum and Inguaral ACI Customer Excellence Global Summit. For the full album, visit the [online event album](#).

**ASQ AWARDS**

European ASQ member airports celebrating
Airport Service Quality

Representatives from Indore and Lucknow Airports with Angela Gittens, Director General, ACI World

Shanghai Pudong International Airport representatives with their ASQ Award
Representatives of the Mik'maq, African Nova Scotian and Celtic communities in a cultural showcase

Halifax Stanfield International Airport staff
International delegates during the ASQ Awards cocktail party

Portland International Jetport display their ASQ Award with Angela Gittens, Director General, ACI World
Joyce Carter, President and Chief Executive Officer, Halifax International Airport Authority delivers a speech during the ASQ Awards Gala
Delhi International Airport team members with Angela Gittens, Director General, ACI World
ASQ FORUM

ASQ Forum delegates interacting with presentations
Airport Service Quality

ACI ASQ Team during the Forum

ASQ Forum delegates interacting with presentations
Marie-Eve Lacombe, Market Research Manager, ASQ provides guidance during the interactive workshop session during the ASQ training day.

ASQ training day attendees working on real life applications of the ASQ programme through gamification.
New to ASQ – training through gamification: AEROPOLY, following the passenger’s journey from one terminal to the next to solve situations relating to the ASQ Programme

Natasha Burazerovic, Market Research Analyst, ASQ with a team of delegates during the ASQ training workshop.
Angela Gittens, Director General, ACI World and Joyce Carter, President and Chief Executive Officer, Halifax International Airport Authority
Delegates arriving at the Welcome Reception hosted at the Canadian Museum of Immigration, Pier 21.

John Webster, Senior Manager, Global Training and Antoine Rostworowski, Deputy Director General, Programmes and Services, ACI World
Joyce Carter, President and Chief Executive Officer, Halifax International Airport Authority delivers opening remarks during the Customer Excellence Global Summit

Delegates during Day 1 of the Global Summit
Airport Service Quality

Lisa Williams, Manager, Programmes and Services, ACI World and John Webster, Senior Manager, Global Training, ACI World at the ACI World booth

Delegates during Day 1 of the Global Summit
The very helpful event volunteer team from Halifax International Airport

Delegates from Delhi International airport, during the Welcome Reception
Airport Service Quality

Shashank Nigam, President and Chief Executive Officer, Simpliflying – Day 1 Keynote Speaker
Brian Shapiro, President, Shapiro Communications, Day 2 Keynote Speaker during his dynamic performance titled “Open Airport: A ground's-eye view”.
As airport executives, one of our key objectives is to provide the right learning and development offerings which provide knowledge to our teams and contribute to improved performance and competitive advantage. But the true value for airports and aviation as a whole is when knowledge is managed via a strategy that supports the organizational strategy, and not the other way around.

Knowledge in the airport business is based on an individual’s capacity to understand and apply skills that lead to action that adds value for the airport, such as increasing safety in operations or improving strategic planning. As a professional, the knowledge we gain is derived from thinking and is a combination of information, experience and insight. To make learning activities successful, we need to provide the right development activity, be it via a course, mentoring, on the job or exchange programme, at the right time to the right individual in the right way in order for them to make an informed decision allowing them to do the right thing.

The goal of knowledge management is to direct the airport’s learning and development (knowledge) resources and processes with the objective of creating value that will give competitive advantages to the airport. When we want to develop knowledge, we need to start with a performance management question: what drives business performance at our airport and how does the team drive it? If knowledge does not add value, it is a waste of time, money and effort.
ACI’s Knowledge Pathways

In order to better assist members with the development of their knowledge management, ACI has begun to develop airport knowledge pathways with an aim of categorizing our course offerings and assisting learning and development professionals when they develop their education plans. We have approached this by creating three pathways:

**Foundation Level - “More Effective and Efficient”**

This level provides courses that teach best practice knowledge and regulatory elements of each operational domain to ensure that staff will become increasingly effective and efficient at their jobs. This can be delivered by online courses or short classroom courses designed to enhance the above-mentioned understanding, whether new to the industry or in need of eliminating gaps in understanding and concepts within organizational staff.

**Advanced - “How to Best Implement”**

Focus on how to “best apply” all of key elements at the airport based on industry best practices. This level is not only about understanding there are regulations or best practices, but also how the professional can apply and implement them in their day-to-day environment.

**Expert –“The Experienced Professional”**

This level develops knowledge-based learning that enables people to create more effective, efficient and better ways of doing things leading to new industry best practices such as developing the airport’s long-term strategic plan.

We are proud to offer the newly imagined knowledge pathways, a set of three educational offerings which provide comprehensive continuing education for any level of airport professional, in any management or technical setting with the end goal of promoting airport excellence!
Photo Gallery
September 2018 Courses

GSN 2 - Airside Safety and Operations, 03-07 September, Munich, Germany
ACI AFR Development Programme: Emergency Planning and Crisis Management, 03-07 September, Lomé, Togo

ACI DNA Seminar: Airport Environmental Management, 05-06 September, Miami, USA
Global Training

ACI AFR Development Programme: Emergency Planning and Crisis Management, 10-14 September, Bamako, Mali

ACHCAO User Charges, 10-14 September, Port of Spain, Trinidad and Tobago
Quality Management in Airport Security, 10-14 September, Bucharest, Romania
The Exceptional Human Airport Experience, 14 September, Halifax, Canada
GSN 5 - Advanced Safety Management Systems, 16–20 September, Abu Dhabi, UAE

Understanding Annex 14, 17-19 September, Cape Town, South Africa
Global Training

ACI-ICAO Aerodrome Certification, 17-21 September, Port of Spain, Trinidad and Tobago

Aeronautical Studies and Risk Analysis, 17-21 September, Riga, Latvia
Airport Human Resources Management, 23-27 September, Abu Dhabi, UAE

Airport SMS Implementation, 24-28 September, Tunis, Tunisia
Global Training

GSN 3 - Emergency Planning and Crisis Management, 24-28 September, Kingston, Jamaica
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OR

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- Certificate in Airport Business Operations (part of the Airport Operations Diploma)

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Contact enrolments@olc.aero for more information on group training.
ACI Events calendar

October—November 2018

THE TRINITY FORUM
31 October—1 November 2018  Shanghai, China

2018 ACI-LAC ANNUAL ASSEMBLY CONFERENCE & EXHIBITION
12—14 November 2018  Miami, FL

ACI EUROPE / ACI ASIA-PACIFIC AIRPORT EXCHANGE
27—29 November 2018  Oslo, Norway

For a full listing of ACI events, please visit www.aci.aero/events.
Training calendar

Safety

**ACI-ICAO AERODROME CERTIFICATION***

**19—23 November**  Bangkok, Thailand

Security

**ACI-ICAO MANAGEMENT OF AIRPORT SECURITY***

**9—13 December**  Abu Dhabi, UAE

Customer Experience

**PASSENGER EXPERIENCE MANAGEMENT**

**3—7 December**  Munich, Germany

Environment

**AIRPORT ENVIRONMENTAL MANAGEMENT***

**26—30 November**  Kuala Lumpur, Malaysia

Leadership and Management:

**AIRPORT COMMUNICATIONS AND PUBLIC RELATIONS***

**3—7 December**  Bucharest, Romania

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**Online Courses**

- CERTIFICATE IN AIRPORT SECURITY
- CERTIFICATE IN PROJECT MANAGEMENT
- AIRPORT OPERATIONS DIPLOMA PROGRAM
- DIPLOMA IN LEADERSHIP ESSENTIALS
- FOREIGN OBJECT DEBRIS (FOD) PREVENTION

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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
Key events and courses

Highlighted events and training
September—December 2018

- **2018 Marketing & Communications Conference**
  14—16 November 2018
  Ottawa, ON

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

- **PASSENGER EXPERIENCE MANAGEMENT**
  3—7 December 2018
  Munich, Germany

- **INTRODUCTION TO AIRPORT ECONOMICS**
  21—23 November 2018
  Montego Bay, Jamaica

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

For additional information please contact us at **training@aci.aero**
CEO Oliver Dlouhý together with Jozef Képesi set up Kiwi.com in 2012 to provide users with the cheapest flight itineraries and combinations. Kiwi.com serves customers across the world with 24/7 support. Today, the company sees more than 75 million flight searches every day and employs over 2000 people worldwide. The site makes travel affordable and easy, by allowing consumers to book everything from individual flights to complete flight itineraries across multiple airlines (both low cost and full-service) in a straightforward and cost-effective way. Kiwi.com has newly incorporated trains and busses into the web search getting closer to its goal of creating a one-stop-shop for travelers. In 2017, Kiwi.com entered the Deloitte Technology Fast 500 EMEA list in 7th place, becoming the highest ever ranked Czech company.
ICF offers nearly 100 aviation experts dedicated to strategic and operations consulting for the aviation industry. We provide objective, independent commercial, financial, technical and regulatory guidance to aviation clients, including airports, airlines, lessors, financial institutions, manufacturers, governments and VIPs. Our four specialized aviation practice areas—airports, airlines, aircraft and aerospace/MRO—collaborate with each other and with our clients to do what it takes to address any business challenge, however complex or difficult it may be. We help airport operators, investors and governments in countries throughout North America, Europe, the Middle East, Asia and emerging regions make key strategic planning decisions, as well as policy, route development, capital investment and concessions planning. Our airport services also include business planning/transaction due diligence, traffic forecasting, master planning, strategic planning and organizational reviews, pricing strategies, commercial planning, air service development and passenger experience.
Tabacarcen SA Logistic Center is the logistic center of Quito’s airport. It is responsible for receiving and consolidating all the air import cargo that gets to the city. We offer the service of renting spacious and modern warehouses for temporal storage of cargo and rental of heated warehouses that allow storing and processing perishables.

We are an Ecuadorian organization with the mission to create great connections.

We believe that any adventure or business trips should not be far from the ones you care about. For that reason, we are here to offer you the best voice and mega packages with more than 50 destinations.

Since 2015 we have been able to connect to more than 140,000 people and more than 14,000 packages have been delivered to travelers.
CGH Technologies Inc. is an information engineering and management support company headquartered in Washington, D.C. with satellite offices in VA, NC, FL, and a workforce spanning 50 states. We have over 25 years of experience with federal and international government agencies, as well as commercial and private sector organizations.