



General Assembly
July 8th , 2021

Welcome !
The meeting will start
at 11:30



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Today's Agenda

1. **INDUSTRY TRENDS**
2. **LEGAL UPDATE ON THE REGULATORY FRAMEWORK**
3. **HANDLERS' LIMITATION AT MXP**
4. **IATA ECONOMICS ANALYSIS ON THE COVID IMPACT FOR ITALY**
5. **COVID SCENARIOS (implementation of the EU COVID19 Certificate)**
6. **AIR TRANSPORT'S ENVIRONMENTAL SUSTAINABILITY BACK ON THE GOVERNMENTS' AGENDAS**
7. **CARGO UPDATE**
8. **IBAR PARTNERSHIP WITH THE MILAN POLYTECHNIC**
9. **AOB**

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Industry trends 1

Europe's performance has been worse than both other areas and world average

State of the Region – Summary Tables

Region (registration basis)	Revenue passenger-kilometres (RPKs)			
	% ch vs. the same period in 2019			
	2020	Jan-21	Feb-21	Mar-21
North America	-65.2	-66.5	-66.2	-57.2
Latin America	-62.1	-58.4	-62.7	-64.5
Europe	-69.9	-77.7	-82.9	-81.7
Asia Pacific	-62.0	-72.4	-75.0	-60.4
Middle East	-72.1	-80.5	-81.7	-80.3
Africa	-69.3	-66.9	-70.9	-71.8
World	-65.9	-72.2	-74.9	-67.2

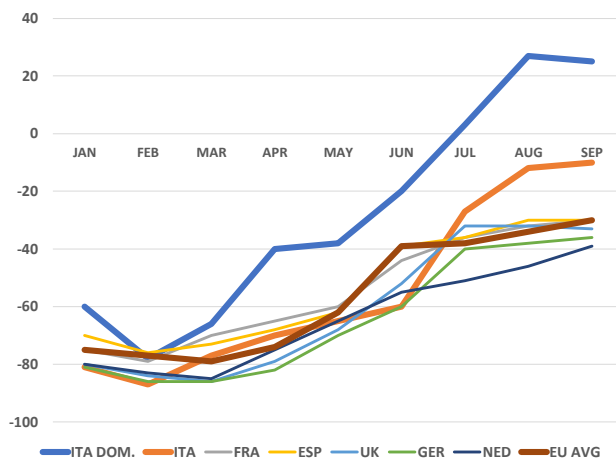
Source : IATA economics



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Industry trends 2 : capacity on offer during the Summer Peak 2021

ASK 2021 vs 2019



- Italy is expected to have the highest recovery rate amongst the main EU markets : (-27% in July, - 10% in September)
- The 2021 capacity in the Italian domestic market will be higher than in 2019 : +3% in July , +25% in August

Source : AOG/ICCSAI



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Legal update

1. ART Resolution 68/2021



Reinstatement of the 2017 Model



Airport can choose between a one/two years' freeze of the charges and the submission of a proposal

2. Handlers' limitation proposal at MXP



Current status , next steps



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IATA analysis

The COVID impact on Italy (May 2021)



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Implementation of the EU Digital COVID Certificate (DCC)

Joint letter
by
ACI Europe
IATA
ERA
A4E
To the EU
Heads of
State and
Government

June 28th,
2021

- Ensure that the DCC verification can be conducted digitally before passengers arrive at the airport, to limit operational disruptions – in line with the latest EASA-ECDC Aviation Health Safety Protocol (AHSP) guidelines⁶.
- Ensure that the remaining DCC verification taking place at airports - for holders of paper DCC, for instance – can be conducted using one single verifier app.
- Develop a state portal to facilitate DCC verification directly by national authorities and limit health data processing by airlines. This online verification – when done off-airport through the state portal – should result in a standard signal such as a QR code provided by the passenger to the airline to facilitate the issuance of the online boarding pass.
- Ensure that the state portal for DCC verification also integrates the verification of the PLF form, ideally using the EU Digital Passenger Locator Form ([dPLF](#)) allowing the seat number to be provided after check-in.
- Refrain from requesting DCC verification on arrival, as it would “serve little medical purpose, and could lead to unnecessary queuing” – as recognised in the EASA-ECDC AHSP.



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Sustainable aviation is the next industry topic



IATA AGM Resolution on sustainability :

- Airlines reconfirmed their **commitment to reduce net CO2 emissions to half of 2005 levels by 2050.**
- SAF can reduce life-cycle carbon emissions by up to 80%.
- Government support should aim at eliminating a **major cost gap** that results in SAF being up to four times more costly than traditional jet kerosene. This has limited its use to about 0.1% of total fuel uplift.
- Governments should avoid taxes and charges** which are inefficient policy instruments to promote sustainability.



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CARGO Update

Yields and loads elevated due to capacity shortage
Load factors around 10% points and yields 50% higher than normal

Source: IATA Economics using data from IATA Monthly Statistics and CargoIS

Cargo capacity shortage due to lack of passenger aircraft
Capacity still 14% down on 2019, despite strong growth of freighters

Source: IATA Economics using data from IATA Monthly Statistics

- National roundtable c/o MOT
- IATA/IBAR meetings with the Head of Customs
- IATA/IBAR meetings with SEA

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Cooperation with the Milan Polytechnic's observatory on digital innovation

1. Project : A research conducted by the *Digital Innovation in Tourism Observatory of Politecnico di Milano* in collaboration with *IBAR - Italian Board Airline Representatives* on the Italian air travel market.
2. In September : *distribution of a questionnaire on the purchasing habits of your clients*
3. In October : *presentation of the report during the TTG (to be confirmed)*

Year	Total Spending (bit €)	Transportation (%)	Facilities (%)	Packages and tours (%)
2015	10.3	28%	7%	65%
2016	11.4	29%	6%	65%
2017	13.0	29%	7%	64%
2018	14.2	31%	7%	62%
2019*	15.5	30%	8%	62%

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AOB 1



BARIN in talks with ILT/CAA for easing maintenance EU261/2004 when booked via agent

All airlines received Guidance Notices from the Inspectie Leefomgeving en Transport (ILT), the Dutch CAA concerning refund requests from passengers directly at the airline when booked via a travel agent.

The ILT states that airlines have to refund the passenger directly within 7 days. This is confronting the airlines with great difficulties such as the question whether a refund was already processed? What was the net fare received by the airline and what was the gross fare paid by the client etc.?

The ILT bases her maintenance (handhaving) on a verdict in the case 'Harm vs. Vueling' in October 2018, but BARIN is in the process of sending a letter to ILT for finding a different interpretation.



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AOB 2

ENAC's DG extraordinary deliberation dated July 7, 2021 :

«Limitation to the access of Ground Handling services' providers in the national airports with immediate effect, for a period of up to two years»



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Thank you !

We look forward
to our next
meeting

