

General Assembly July 12th, 2022



Welcome on board !

The meeting will start at 11:00

Today's Agenda

- 1. INTRODUCTION OF GUESTS & NEW MEMBERS**
- 2. APPROVAL OF PREVIOUS ASSEMBLY MINUTES**
- 3. INDUSTRY ROUND-UP**
- 4. MOT : NATIONAL AIRPORT PLAN, DELAYS/CANCELLATIONS/INDUSTRIAL ACTIONS, CARGO**
- 5. PHARMACOM ITALIA**
- 6. HILTON PARTNERSHIP**
- 7. EXECUTIVE BOARD CANDIDACY**
- 8. NEW ART MODEL**
- 9. ENAC VIDEO**
- 10. 2021 ACCOUNTS**
- 11. AIR TRANSPORT SUSTAINABILITY**
- 12. JOBS PAGE ?**
- 13. AOB**



Industry Statistics

Financial Results

June 2022

System-wide global commercial airlines	EBIT margin, % revenues				Net profit, \$ billion			
	2019	2020	2021E	2022F	2019	2020	2021E	2022F
Global	5.2%	-29.0%	-8.9%	-1.8%	26.4	-137.7	-42.1	-9.7
Regions								
North America	9.6%	-27.3%	-5.9%	1.9%	17.4	-35.1	-2.2	8.8
Europe	4.8%	-27.1%	-8.8%	-2.6%	6.5	-34.5	-11.9	-3.9
Asia-Pacific	3.7%	-34.3%	-13.5%	-5.9%	4.9	-45.0	-15.2	-8.9
Middle East	-5.2%	-24.3%	-11.4%	-3.0%	-1.5	-9.4	-4.7	-1.9
Latin America	2.9%	-28.5%	-9.0%	-2.8%	-0.7	-11.9	-6.9	-3.2
Africa	1.0%	-16.9%	-6.8%	-2.8%	-0.3	-1.8	-1.1	-0.7

Traffic Results

June 2022

Air Passenger Market Analysis May 2022

System-wide
global
commercial
airlines

Passenger traffic (RPK)

	% change vs previous year		% change vs 2019	
	2019	2020	2021E	2022F
	Global	4.1%	-65.8%	-58.3%
Regions				
North America	4.0%	-65.1%	-39.7%	-5.0%
Europe	4.2%	-69.5%	-61.2%	-17.3%
Asia-Pacific	4.7%	-62.0%	-66.8%	-26.3%
Middle East	2.3%	-72.1%	-68.8%	-20.9%
Latin America	4.2%	-62.5%	-47.4%	-5.8%
Africa	4.7%	-68.2%	-62.9%	-28.0%

- ❑ Global RPKs grew 10,7% over April 2022
- ❑ International bookings exceeded domestic bookings, confirming the high willingness to travel abroad
- ❑ International traffic continued to soar in all markets
- ❑ **Within Europe** RPKs were 16,7% above pre-pandemic levels
- ❑ **Europe – Central America : + 8,6%**
- ❑ **Middle East – North America : + 31,8%**
- ❑ International traffic recovery is accelerating in **Asia**, where a swift rebound is expected as travel conditions are being gradually eased.

CORRIERE DELLA SERA

Voli aerei cancellati, ritardi, scioperi: a rischio le vacanze di 7 milioni di persone

Rai News

Caos aeroporti : Voli cancellati e ritardi: luglio, un mese di passione

I disagi già si stanno notando in alcuni aeroporti, europei e non solo, a causa degli scioperi del personale di diverse compagnie.

URGENT MEETING ! 6.7.2022

IBAR position :

- ❑ **In general, Italy –thanks to the large scale adoption of welfare measures– has tackled the restart in a better position than other EU Countries;**
- ❑ **This has not protected the national echosystem from reactionary delays and negative repercussions generated by other factors (congestion and understaffing at several EU airports, ATC industrial actions, COVID reinsurance);**
- ❑ **261/04 remains an unfair regulation placing the burdens of assistance and compensation solely on the Carriers;**

Ministry's PRESS RELEASE :

Trasporto aereo: il sistema italiano ha retto, disagi indotti legati a difficoltà di alcuni scali europei



6 luglio 2022 – Thanks to the welfare measures introduced by the Government during the pandemic crisis the Italian air transport system has withstood the traffic recovery of the last few months. **The current inconveniences experienced by the passengers are caused primarily by the repercussions imposed on our system by inefficiencies and delays of other European systems**, as confirmed by the Eurocontrol data.

This is the outcome of the meeting convened with the employers' Associations (Assaeroporti, Aeroporti 2030, Assaereo, Aicalf, Assohandler, **Ibar**, Fairo), Enac and Enav to analyse the reasons behind the difficulties at our Airports and study the possible solutions.

ENAC will evaluate the introduction of further recommendations aimed at mitigating the inconveniences. The Airports will be required to ensure that **food & beverage outlets**, as well as **public transport** services remain serviceable even in case of delays beyond the normal operating hours.

The passengers will be invited to travel, as far as possible, with their **hand baggage only** to avoid long waiting times upon arrival.

NATIONAL AIRPORTS' PLAN OUR RECOMMENDATIONS

- 1. Allocate funds where they are effectively needed**
(eg : MXP vs smaller airports in Southern Italy for CARGO)
- 1. AIRPORT NETWORKS allow cross-subsidies between commercially viable and loss-making airports**
- 2. Approach based on market demand instead of politically driven local ambitions.**
- 3. High speed train services at main airports (no cost for airport users)**

Technical workgroup on air transport c/o Italian MIT #1

Timeframe : **APRIL – DECEMBER 2021**

Participants : **Associations representing Airports, Logistics sector, Ports, ANSPs, Ground Handlers, Air Cargo Forwarders, ENAC, ENAV, Unions, Consumers, Confindustria (Employers) and Carriers**



IATA IBAR
AICAI
AICALF
ASSAEREO
FAIRO

Topics :

- 1. Strategies (National Airport Plan)**
- 2. Traffic attraction**
- 3. Sustainable aviation**
- 4. Digitization**
- 5. Cargo**

CARGO PROGRESS

ITALY

2017 : MOT publishes the «White paper on AIR CARGO» drafted in cooperation with the industry stakeholders.

APR2021 : MOT summons a new working group on air transport, including CARGO.

APR2021-DEC2022 : MOT receives from IATA/IBAR/ASSAEREO/AICAI all the requested recommendations with examples of the best practices already in place elsewhere in EU;

JUN22 : MOT requests more information on «sustainability, e-commerce , night flights etc.»

JUN22 : Political agreement is reached on the Cargo Area expansion plans at MXP (first project presented by SEA in 2009)

EU

AMS : Air Cargo Netherlands

This community, always taken as example, has developed a digital environment (e-link) connecting all actors at the airport and enabling a digital flow of data. Paper is almost of no use
<https://acn.nl/>

FRA : digital test field air cargo

A project sponsored by the german govtrment involving all actors (Universities, airlines, forwarders, airport managers and trucking companies) to develop and implement a digital air cargo environment, based on the IATA ONE Record standards, to be applied in all german airports.

[Konsortium - DTAC \(digitales-testfeld-air-cargo.de\)](https://www.konsortium-dtac.de/)

BRU : Air Cargo Belgium.

Strong (young) air cargo community that has recently developed the digitization especially for pharma handling

<https://aircargobelgium.be/steering-groups/3/digitisation>

MAD/BCN : Air Cargo Communities

Politically very strong Aircargo communities

Memorandum of understanding



July 5°, 2022

BAR PARTNERSHIPS



BARIN Preferred Partners



Associate Member List

- Aviareps UK Ltd
- Bird&Bird
- Business Travel Association
- Clyde & Co
- Collyer Bristow LLP
- Heathrow Express
- Heathrow Southern Railway
- Holman Fenwick Willan
- Ince
- JM Associates
- Kennedys
- Stephenson Harwood
- Themis Advisory



BARIG business partners



Meet IBAR first Partner !



Executive Board candidacy

Fatih Atacan TEMEL | General Manager , Milano
Turkish Airlines Inc.



Aviation day celebrations at the Vatican

May 13° : Air Transport meets His Holiness Pope Francis



<https://www.youtube.com/watch?v=qL2wyNoSUXQ>



ENAC 25° anniversary



Equipaggio volo inaugurale a Roma 1950 (DC-6)



NEW ART MODEL FOR AIRPORT CHARGES

TIMELINE :

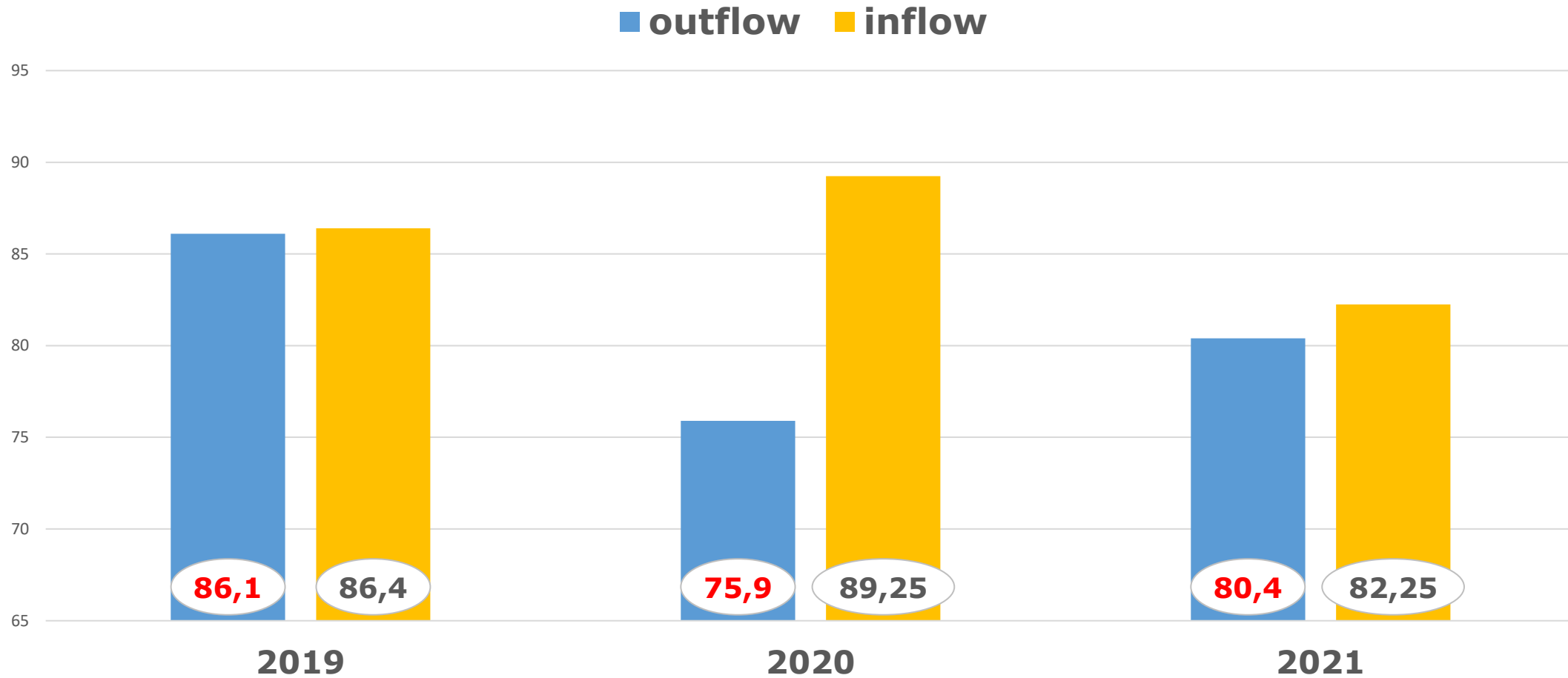
- ❑ **July 15th : deadline for the submission of observations (draft)**
- ❑ **July 28th : public consultation meeting (draft)**
- ❑ **September : expected publication by the Authority (final)**
- ❑ **60 days from publication : the new Model may be impugned before the Turin Administrative Tribunal**

IATA – A4E – IBAR are actively participating in the consultation and will analyze its prospective impact on the future airport charges

NEW ART MODEL FOR AIRPORT CHARGES

- ❑ **STRICTER TRANSPARENCY REQUIREMENTS IN THE REGULATORY ACCOUNTING**
- ❑ **SLIGHT IMPROVEMENTS IN THE CONSULTATION PROCEDURES**
- ❑ **ADDITIONAL REVENUES DERIVING FROM SURPLUS TRAFFIC WILL BE FULLY SHARED IN THE CHARGES (previously only 50% towards new investments)**
- ❑ **DUAL TILL (with full accounting separation and obligation to pay incentives only from commercial revenues)**
- ❑ **EXCESSIVE CAPITAL REMUNERATION**
- ❑ **CARRIER PUNCTUALITY PERFORMANCE INCLUDED IN THE SLA**
- ❑ **REGULATORY PREROGATIVES FOR ROME , MILAN AND VENICE AIRPORTS REMAIN UNCLEAR**

IBAR financial outlook



SUSTAINABILITY OF AIR TRANSPORT

- ❑ Air transport is responsible for 2% of the CO2 emissions.
- ❑ Taxation is the wrong approach , incentives for the best practices work better.
- ❑ SAF should become gradually available at all airports at no extra cost
- ❑ In the short term , the most effective measure by far to reduce CO2 (up to 10%) emissions is the ATC OPTIMIZATION (SINGLE EUROPEAN SKY)

- ❑ IATA & IBAR are active participants in the
 «NATIONAL FORUM FOR THE DECARBONIZATION OF AIR TRANSPORT»
- ❑ High Level Event on 21SEP22

Airline Jobs

BAR UK promotes airline career and aviation job vacancies on behalf of its membership.

Please apply directly to the airline.

Jobs & Internships

Career opportunities - take off with BARIG members: Our online job market offers job vacancies and internships in many challenging aviation areas.



BARIG
Board of Airline
Representatives
in Germany

**Any questions, remarks ,
complaints ?**

Have a lovely summer



We look forward to seeing you all in December !