

IBAR GENERAL ASSEMBLY

THANKS FOR JOINING and WELCOME !



**The meeting will start at 11:00
Please stay tuned**

- ❑ Quorum check , welcome new attendees
- ❑ ELECTIONS - President , Executive Board , Secretary General
- ❑ 11:30 - 11:50 IATA - Robert Chad : the latest figures, trends and priorities within the industry
- ❑ 12:00 - 12:20 UNIVERSITA' MILANO BICOCCA - Andrea Giuricin : LCC us LEGACY , more similarities than differences
- ❑ IBAR LEGAL COUNSEL - Handling limitations , Alternative Dispute Resolutions
- ❑ AIRPORT CHARGES - Luciano Neri : the big battle of 2023
- ❑ CARGO : Eduino Corradi : update on digitalization
- ❑ AOB
- ❑ CLOSING REMARKS - Flavio Ghiringhelli
- ❑ MEET OUR NEW BUSINESS PARTNER : Thrust Aviation HR

ELECTION TIME !



PRESIDENT

Flavio Ghiringhelli

BOARD MEMBERS

Alberto Nanni (Cathay Pacific)

Gianluigi Lo Giudice (Alitalia)

Benito Negrini (Luxair)

Lorenzo Lagorio (Easyjet)

Stefano Pontiggia (DHL)

Eduino Corradi (LH Cargo)

Ramzi Zawaideh (Royal Jordanian)

Gabriella Galantis (Lufthansa Group)

Cemil Ciloglu (Turkish Airlines)

Rita Gaglione (ITA Airways)

Renato Scaffidi (Air Europa)

SECRETARY GENERAL Luciano Neri



ITALIAN BOARD AIRLINE REPRESENTATIVES

LEGAL UPDATE

☐ HANDLING LIMITATIONS (MXP and FCO)

- Advocacy of FREE MARKETS is enshrined in the IBAR mission :(IBAR STATUTE art.3)
« ... by presenting reports and complaints and actively participating in the administration proceedings and inquests on such matters as :
... **u) total liberalization of ground handling services;**
- POAs needed , the forms to be signed will be circulated soon
- NO legal costs for the carriers

☐ ALTERNATIVE DISPUTE RESOLUTION – ADR (law 5AUG22, n. 118)

- ART has just opened a consultation on the draft ADR Regulation (for all transport modalities)
- Deadline for the submission of observations:
9JAN23

Presentations by :

Dr. Robert Chad

IATA

**Area Manager for France, Belgium, the Netherlands,
and Southern Europe**

Prof. Andrea Giuricin

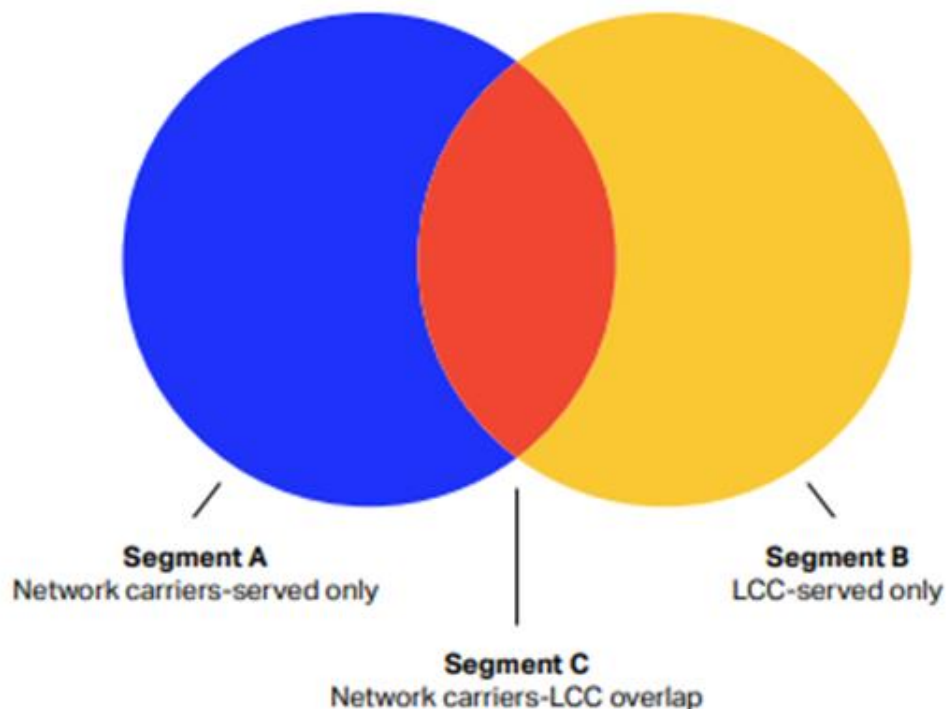
Milano Bicocca University

Istituto Bruno Leoni
















IATA Economics : One Size does not Fit All. A Study of how Airline Business Models have evolved to meet Demand in Europe

Fundamentally different,
but complementary,
Models and Networks

Chart 7: Business models serve distinct market segments in the European aviation sector





Airline/ Airline Group (January-September 2022)	Avg. daily flight (2022)	% of operated flights in Europe (2022)	% change vs. 2019
 Ryanair Group	2,584	10.1%	+9%
 easyJet Group	1,367	5.3%	-21%
 Turkish Airlines	1,253	4.9%	-8%
 Lufthansa Airlines	1,046	4.1%	-31%
 Air France Group	945	3.7%	-22%
 KLM Group	716	2.8%	-18%
 Wizz Air Group	660	2.6%	+12%
 British Airways Group	626	2.4%	-32%
 Vueling	547	2.1%	-12%
 SAS Group	520	2.0%	-37%
 Eurowings Group	430	1.7%	-37%
 Pegasus	423	1.7%	-11%
 TUI Group	383	1.5%	-15%
 Norwegian Group	341	1.3%	-46%
 SWISS Group	332	1.3%	-29%

*Low Cost Carriers are highlighted in blue

CARGO UPDATE

E-Freight

MXP : the new regolamento di scalo will make the “SEA digital platform for cargo” mandatory for the customer. This is a first step, however there is need of a realistic “data - sharing” model (possible via the IATA ONE Record)

Waiting for the new developments within the MIMS to restart discussions on Aircargo topics (including digitalization)

eAWB.

Still too many cases where airlines declaring eAWB compliance are requesting paper copies to freight forwarders

Dangerous goods

New training approach from IATA (CBTA) will change the vision of training from the “CAT” to the “tailor made” . This will affect all personnel, from shipper to operators and suppliers, not only in cargo

ENAC registration changing into certification

Currently ENAC is registering the companies supplying DG training only for those categories not under the responsibility of operators. In future, ENAC will change from registration to certification. Still for those trainings not under the operator's responsibility

KEEP UP THE GOOD WORK !



2023 : vast amounts of money at stake - 1

In 2021 and 2022 the italian AIRPORT CHARGES HAVE BEEN LARGELY FROZEN for various reasons :

- ❑ The recovery of the COVID losses/revenue shortfalls would have been commercially unviable
- ❑ Regulatory uncertainty in connection with the publication of the new models for the definition of airport charges
- ❑ Legal standstill on the transition from ENAC to ART of the regulatory powers covering ROM, MIL and VCE Airports

❑ ON 23DEC, ART WILL PUBLISH THEIR LONG-AWAITED NEW MODEL :

In 2023 (barring more legal hurdles) most italian airports will start presenting their new multi-year proposals incorporating the recovery losses/revenue shortfalls of the preceding years.

❑ Overall Size of the amounts to be recovered (press statements) :

1,1bln for 2020 (ENAC) , 2bln for 2020, 3bln for 2020-2021 (ASSAEROPORTI)

On top of which :

1,1bln of «green» and «digital» projects to be implemented at the airports

Offsets :

650mln public funds' compensation

2 years' extension of all concession agreements

2023 : vast amounts of money at stake - 2

- ❑ Two small examples :

FCO – PRM 2023 : 2m € (airl. Attendance 59%)

BLQ – charges 2023-2026 € 1,8m (2023 only) (airl. Attendance 69%)

- ❑ In Europe airport costs typically represent 15% of the airlines' operating costs (IATA)

- ❑ Total journey cost is the n. 2 priority for the passengers (IATA GPS 2022)

- ❑ Even within a rigid regulatory framework , SAVINGS ARE ALWAYS WITHIN REACH DURING THE CONSULTATION PROCEDURE

on condition that :

- the majority of the votes (WLUs) are participating

- the carriers' actions are coordinated

If you or your colleagues cannot attend the consultation meetings , remember that proxies are important !

MEMBERS : A GREAT COMEBACK !



**BUSINESS PARTNERS : DIGITAL SOLUTIONS
FOR AIR CARGO**



**ASSOCIATIONS : ANOTHER MOU COMING
SOON**





DECARBONIZING THE AVIATION SECTOR:
an Italian best practice

PATTO PER LA
DECARBONIZZAZIONE
DEL TRASPORTO **AEREO**



January 24, 2023
15H00-17H30

EUROPEAN PARLIAMENT, BRUSSELS



ITALIAN BOARD AIRLINE REPRESENTATIVES

THANK YOU FOR YOUR TIME

**BEST WISHES FOR A RELAXING FESTIVE SEASON,
AND A HAPPY AND PROSPEROUS NEW YEAR
and**

SEE YOU ALL SOON IN



MILAN

!!!