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Editor's NOTES



Edward Robertson
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Whisper it quietly, but it feels like there is a sense of optimism in the air.

The vaccination programmes rolling out across the world may be doing so at an uneven rate, but where they are being successfully administered people in the aviation industry appear to be a little more positive.

In the US, President Joe Biden has committed to a \$2 trillion package to upgrade the country's infrastructure, with some of it already allocated to airports (page 17).

Meanwhile, on page 22 you can read about how conversations are already taking place in the Caribbean as to how to make inter-island travel easier as the region's aviation industry begins to find its feet again.

Dubai International Airport is preparing to meet new demands from airlines as travellers return to the skies, but with different priorities thanks to Covid-19 (page 26).

Interlining also has an important role in driving the return of passengers and is set to evolve further, again in response to changing demands from consumers (page 12).

Meanwhile, staff at Cape Town International Airport (page 30) are confident that both the airport and South Africa could benefit from being one of the few southern hemisphere countries that has both a successful vaccination programme and is keen to reopen borders to tourists as soon as possible.

Ground handlers like Menzies Aviation are also adapting (page 42), with an increased focus on cargo being used to fill the gap in ground services business as airlines kept most aircraft grounded.

Of course, this being the world of aviation problems remain. On page 34 Heathrow's John Holland-Kaye has renewed calls for increased capacity at the airport in the wake of Brexit.

Meanwhile, IATA's new director general Willie Walsh discusses how governments' reactions to the Covid-19 pandemic around the world meant airlines' best-laid emergency plans were largely rendered useless (page 4).

Despite this, it does feel like some positivity is out there as the aviation industry does what it does best in the event of any crisis: adapt, move on and hope for a speedy return to profitable operations as eager travellers are once again permitted to fly.

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04 Airlines

IATA's new director general Willie Walsh considers life under the Covid-19 lockdown and lessons for the future

08 Airlines

Canadian North president and CEO Chris Avery opens up about running an airline in the Arctic Circle

12 Airlines

Interlining is about to undergo a revolution as the world returns to the skies in the wake of the pandemic, argues Air Black Box's Patrick Redmond

16 Route development

How much will US airports benefit from President Joe Biden's \$2 trillion economic stimulation and infrastructure package

22 Route development

Can the Caribbean's aviation sector build back better in the wake of Covid-19

26 Airports

Dubai Airports CEO Paul Griffiths is refining his strategy to keep the top sport for handling the most international passengers



34

30 Airports

Wesgro's David King believes Cape Town International Airport can lead a southern hemisphere revival as Covid-19 restrictions lift

34 Airports

Heathrow boss John Holland-Kaye is keeping the pressure on for a third runway in a post-Brexit UK

38 Technology

Open architecture could revolutionise the security experience at airports, says Smiths Detection global director aviation Richard Thompson



38

42 Ground handlers

Menzies Aviation EVP Middle East, Africa and Asia Charles Wyley on how new cargo stations should help expand ground handling operations

44 Ground handlers

Dnata is deepening business ties and striking new deals with Singapore-based businesses

47 Ground handlers

Worldwide Flight Services has expanded operations in the US with a dozen new deals



47

Learning the lessons of Covid-19

New IATA director general Willie Walsh says airlines will be updating plans for the next pandemic, even as they struggle to resume operations this time round thanks to governments' failures



Willie Walsh

It's hard to know where we stand in the Covid-19 pandemic at the moment.

On the one side the vaccination programme is rolling out in many parts of the world and giving hope that a sense of normality and, importantly for readers of *ARGS – Airline Routes and*

Ground Services, that international travel is beginning to return.

However, we need only look at the heartbreaking scenes in India, where Covid-19 has been so recently out of control and a new, possibly even more dangerous variant has emerged, to

know that the pandemic is far from over and could yet force new restrictions globally.

Whatever the case, IATA director general Willie Walsh argues that a post mortem into the crisis is inevitable as we seek to understand how the world could have handled the pandemic better.

Speaking at the online CAPA Live event in May, he says: "Anybody who believes that we've handled this in the best way possible is incredibly naive because there's no question that wrong decisions were made at different times.

"Going forward, I'd like to think that we all learned from it because we can see something like this (happening) again."

And already airlines will be rethinking their pandemic planning in the wake of events Walsh adds, as he brings 15 years of experience of being IAG CEO to his new role as the head of IATA which he started in April 2021.

In particular, he believes there is one future consideration that not a single airline had previously anticipated but will need to be addressed.

Walsh says: "The one thing that I don't think we factored in was that governments globally would shut down.

"People felt that there would be some regional restrictions, but the idea that everybody just said: 'no, you can't travel', I certainly didn't see that.

"We've got to learn from this and clearly I'd like to think that we, when faced with a similar event in the future, will be able to handle it much better."

In the meantime, he is hoping that international travel will soon return and is keen to ensure that when it does, it will not be restricted to those members of the human race that have already been vaccinated.

Walsh says: "We've been very clear that reopening borders shouldn't depend solely on vaccination because there isn't going to be an even rollout of vaccines. It would be terribly unfair at every level."



There are still lessons to be learnt from Covid-19

Instead, Walsh advocates a twofold system where either proof of vaccination or effective testing systems are used to allow the return of significant international travel.

However, he urges countries to focus on introducing an efficient and cost-effective testing system, and cites the example of Malaysia which offers the cheapest PCR test IATA could find at \$27, while Japan offers exactly the same test - but for \$278.

If they do not introduce cheaper tests, he believes families will be left unable to afford even a short-haul trip as the cost of tests far outweighs the cost of the flights.

Walsh says: “That’s a disgrace and we shouldn’t allow it to happen because aviation has been a key to freedom all around the world. Back in the late 1970s, it still was really the preserve of rich people and not everybody could afford to fly. That has changed and that’s been

a fantastic advance.”

He also argues that given it is governments that are insisting on the tests to allow the resumption of travel, they should certainly not be seen to be profiting from them and should even consider picking up the bill themselves.

Walsh says: “I find it really infuriating that they’re mandating this test, that they are ignoring the fact that there’s clear

evidence of people being ripped off by high prices, and then they're happy to charge on top of that as well.

“So we (IATA) have got to keep a very clear focus on this issue and do everything we can to ensure that we can drive down these prices to a much more effective and cost-efficient level and enable people to travel.”

As much as Walsh would like to see global standards agreed and implemented to restart international travel, he adds it is unlikely to be introduced until 2022 at the earliest.

In the meantime, he expects the world's airlines to adapt to whatever is required by each country in order to restart operations in any meaningful sense, just as they always have done.

Walsh says: “Our industry can work at a much faster pace than governments can, but on the other side of that, we're used to having to deal with a multitude of restrictions and the industry is good at being able to adapt.

“You get differences in requirements as to what you have to do when you're going through security at an airport. We cope.

“We would prefer it if it was a single, simple system applied globally and we see some evidence that it's moving in that direction, but if it doesn't, we'll still be able to cope. The critical issue is that we get international travel up and running again.”

And when airlines are given the green light to commence operations again, Walsh is confident that the demand will be there, even if it is initially the leisure market that drives the return to the skies.

He says: “Consumers have a lot of money available to spend and I think one of the things that they're going to be prepared to spend it on is travel again.

“The industry will be impacted by a reduction in business travel, but I think the industry can cope with that and will be rebuilt in a cautious way to ensure that the network that airlines have in place will support the recovery of their financial positions.”



The closure of the EU's internal borders was a major mistake

Brexit and the EU cause concern

➔ As the former CEO of the Anglo-Spanish IAG and as an Irishman, IATA director general Willie Walsh is well acquainted with the politics of the EU and the most recent major event to have affected it – Brexit.

Explaining that he voted to remain in the 2016 referendum, he adds: “I'm disappointed that the UK left, but it has and the world moves on; so things will settle down and adapt.”

However, what is more interesting is his belief that a key failing of the UK in its relationship with the EU was its inability to recognise the power it could have wielded had it more fully engaged with the group of 27 other countries.

Speaking at the online CAPA Live event in May, Walsh says: “The UK could have exercised a lot more influence within the EU if it wanted to. It's disappointing from a political point of view that the UK had effectively disengaged from the EU many years before it actually formally left; because the UK could have been a very influential voice and an effective voice in

setting the agenda in many areas.”

Nor does this mean he is blind to the EU's failings, and in particular to its response to the Covid-19 pandemic which saw the Schengen Convention, which guarantees free movement among member states, effectively ripped up by those same states as they closed their borders to all international travel.

Walsh says: “To be honest, I thought that in a post-Brexit environment, the EU would want to clearly demonstrate the value of the single market and freedom of movement.

“It was very disappointing to see that freedom of movement, in effect, suspended through this crisis because I think it's been one of the fantastic achievements of the EU.

“The EU needs to look at itself and really ask itself whether it has operated effectively since this crisis broke out.

“Has it secured the fundamental freedoms that people have enjoyed that the EU has built? I don't think it has, it should have done a better job. The EU should have been working much more closely together internally, so it will be interesting to see how that debate continues in the EU.”

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Northern flights

Canadian North provides a vital lifeline for remote settlements but, in doing so, is regularly confronted by the impact of climate change

Given the amount of arguments surrounding the role aviation has to play in both connecting people but also causing global warming, it is astonishing to find a single airline that perfectly encapsulates the dilemma.

But listening to Canadian North President

and CEO Chris Avery speaking online at the CAPA Live event in May is to be reminded of both the importance and the impact that aviation has on the modern world.

On the positive side, the airline is completely owned by the Inuit population who are indigenous to

Canada's Arctic north and who view the airline, which covers 40 per cent of the country's landmass but serves just 1 per cent of its population, as a vital lifeline.

However, with aircraft emissions believed to be a significant contributor to global warming Avery says he is

regularly confronted by the changes to the world's climate and the unknown damage aviation does to it.

Avery says: "As I travel up north with my board chairman and other board members who live in the north, they will point to a bay and say, 'in the middle of winter ... when I was a kid, we walked across this bay to the other side and that's where we would hunt'.

"Now, you can look across but you can't walk across anymore, the water is still there and it hasn't frozen over, despite it being at the peak of winter. We see firsthand through the communities we serve, our customers and our ownership group, the impact of global warming. We feel a strong responsibility for that."

Vital connections

However, despite the regular reminder of the harm global warming is doing to the planet, Avery maintains Canadian North is needed to operate the services required to maintain the communities as they live

and work in their traditional homelands.

And these services are highly varied, just as life is in that extreme an environment. At its most basic the airline delivers essential groceries including bread and milk but is also on hand to supply medical transport in emergencies.

Avery says: "We are the highways and the roads for most of the communities because most of the communities we serve are not accessible by roads, not accessible by rail but maybe accessible by sea, for about two months of the year. So we provide an essential service."

Following a merger with rival Canadian airline First Air in November 2019, the services are operated by a fleet of 31 aircraft, including four combi aircraft, and revenues are raised through three streams: cargo, scheduled passengers and charter. However, operating that far north Avery says the weather can have far more of an impact on operations than it does in much of the rest of the world.

"We see firsthand ... the impact of global warming. We feel a strong responsibility for that."

Chris Avery
CEO, Canadian North

CAC calls for public/private sector coordination



The Canadian Airports Council (CAC) has called for greater coordination between the public and private sectors as commercial air services gradually resume in the wake of the Covid-19 pandemic.

The council is a division of Airports Council International-North America and represents more than 100 airports in the country.

Now, with air travel at an all-time low the council has called on the Canadian government to work with the country's airports, which it claims have already led the way in introducing Covid-19 safe practices not only to maintain the sector in the downturn, but also in the hope eventually of a much greater resumption of travel.

A statement released by the CAC said: "From the start of the pandemic,

Canada's airports have worked to mitigate the spread of Covid-19, repatriate Canadians, and deliver medical equipment, professionals and vaccines to fight this disease.

"Today, air travel nationally is reduced by 90 per cent. Only the most essential travel remains and must be protected to keep this essential flow of goods and people.

"While this is our situation today, industry together with governments need to follow public health advice and good scientific data.

"We are proud of our record and the role that the aviation industry has played. Airports and industry partners have demonstrated leadership to implement enhanced cleaning and sanitisation protocols and reduce

passenger touchpoints.

"(Canada's chief public health officer) Dr Theresa Tam continues to indicate that there is no evidence of transmission in air travel.

"Further, airports worked with government leaders to implement strong health testing and screening measures for passengers, including pre-departure PCR tests, arrivals testing, and 14-day quarantines. We remain at the ready to ensure Canada has a plan that's founded in science to safely resume travel.

"We look forward to continuing to work side by side with government leaders on a risk-based plan for the safe resumption of travel, founded in good science when the time is right, and begin the process of economic recovery."

The effects of climate change are clearly visible in the region



He adds: “It’s a harsh environment. In our airports there are times when the temperature gets to a certain degree low enough that it’s below the operational capabilities of the aircraft.”

Avery says the airline’s cargo business has been boosted by its working relationship with Amazon, which has been one of the

winners of the Covid-19 pandemic as ecommerce boomed. The airline opened a new Amazon pickup facility at Iqaluit Airport in December 2020 to cope with the additional demand generated by consumers shopping from home.

Which is just as well as, like airlines around the world, the carrier’s

passenger figures fell off a cliff in March 2020 as the Covid-19 pandemic spread out across the world.

Avery says: “Essentially 80 per cent, 90 per cent of our bookings disappeared; it hit us just as hard as everyone else and then we saw the territories we serve close off their borders.”

Even now, he adds many of the restrictions, such as a two-week quarantine period, still in place in Canada continue to damage the business badly.

Avery says: “You can imagine what that does for passenger traffic for us. We support the measures because it’s a small population, a tight-knit population, and the prospects of Covid-19 are challenging for the north.

“It doesn’t have the infrastructure of the south so we support these closures, but it’s devastating for the business, as you can imagine.”

Delayed recovery

Despite the hard work by the community to protect itself, Avery says Covid-19 has made it to Canada’s northernmost regions with the territory of Nunavut having the highest level of Covid-19 recorded in the 14 months since the pandemic began.

This has resulted in the area still undergoing quarantine, with some even

tighter restrictions, meaning the airline is not feeling the optimism parts of the rest of the world are beginning to experience.

Avery adds: “We aren’t seeing the positive booking trends yet, having said that... we’re optimistic about it. There will be a recovery and we believe it will be a strong recovery.

“It’s a matter of when and, maybe in the north, that might be a little later or it might be faster because it’s more essential.”

When the recovery does come, Avery is also confident that it will be in part driven by the interline agreements Canadian North shares with both Air Canada and WestJet.

“That allows us to provide an extended network to our customers and it allows both our national airlines to expand their network,” he adds.

“I would say people in the north travel a fair bit, probably more so per capita ... and out of necessity than most people in Canada and maybe in North America.”

“There will be a recovery and we believe it will be a strong recovery.”

Chris Avery
President and CEO,
Canadian North

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Time to work together again?

As Covid-19 vaccinations roll out across the world, so airlines are keen to get back into the skies and start operating as many services as possible. Air Black Box chief commercial officer Patrick Edmond argues now is the best time for airlines to rethink their attitudes to interlining as new technology makes the practice easier

As the aviation industry emerges from Covid-19, airlines are looking at all possibilities to regain their traffic, rebuild their networks, and recover from the nightmare that the last couple of years has represented.

It has been bad enough for airlines to miss out on one summer of activity, as summer is when most airlines make their profits for the entire year. Now,

many airlines face their second summer of either no, or very restricted, revenue across many parts of the world.

While it is unclear when those revenue restrictions will lift, it is obvious that the post-Covid-19 aviation world will look very different from the old one.

Many airlines have already received bailouts, some running into billions

of dollars, from their respective governments while other airlines have shut down. And there will be further casualties well into 2022.

The airlines that remain face a different network landscape. Network carriers, who have had to retrench their networks to weather the crisis, are now finding that their alliance partners have also cut back their networks and can no longer provide the same kind of connecting feed they could previously enjoy.

On the other hand, LCCs, which are typically more resilient in an economic downturn, see opportunities to further expand their market share. As a result, legacy airlines are looking for new cooperation opportunities and LCCs must realise how they can provide feed traffic to those legacy carriers.

The fundamental problem is that legacy interlining is not fit for purpose. Yes, it works for network carriers, but network carriers represent a diminishing share of global air passengers.

Moreover, legacy interlining relies

on complex and resource-intensive processes that were defined perhaps 50 years ago in an era of regulated fares and state-owned flag carriers protected from competition.

LCCs, on the other hand, do not have interline departments. They do not prorate connecting tickets. They do not use the IATA Clearing House to settle interline payments.

In short, they are not set up for old-style interlining. But there is a new emerging option in terms of interlining, which we could call third-generation interlining.

Out with the old

The old legacy approach was the first generation. Early self-connecting itinerary providers represent the second generation.

Now, third-generation interlining combines the benefits of legacy interlining with the reach of LCCs and legacy carriers, and even multimodal travel providers including train operators, bus operators or ferry companies.

Third-generation interline solution providers like Air Black Box connect these different providers and allow them to offer a new global network.

With third-generation interlining, LCCs can partner with network airlines. They can offer seamless itineraries booked in a single transaction, sell (and collect commission for) ancillaries on the other airline and enable travellers to check their bags through to their final destination - a long-standing pain point for self-connecting passengers.

And the best thing of all? There is no extra complexity for the LCC. The solution provider installs all of the plumbing to join the individual passenger name records (PNRs). The solution provider takes care of the payment and settlement. And the solution provider handles the disruption recovery in case of irregular operations (IROPS) or schedule changes.

What about full-service carriers? Third-generation interlining opens up a whole new world of partnership opportunities for them. As I like to say to network airlines:

“Imagine you could interline with anyone. Well, now you can.” Network carriers who want to offer a high standard of customer service with through-checked bags and aligned ancillaries can now do so. Suddenly, they have a new option for rebuilding their networks, and indeed for building new networks.

This approach can work anywhere globally, although there are some regions where we see particular opportunities. For example, in Europe and Asia, LCCs have taken a very high market share and provide potentially interesting feed opportunities for long-haul airlines serving those regions.

Of course, this is not just about LCCs connecting to network carriers; third-generation interlining also enables them to connect with other LCCs. For ultra-low-cost carriers (or ULCCs) who do not even offer connecting flights on their own networks, third-generation interlining gives them a straightforward way to do so.

Stripping out tech complexities

Which airlines stand to gain the most from adopting third-generation interlining? As real estate agents are fond of saying, it is ‘location, location, location.’

In this context, that means carriers with solid networks in a particular region or which provide feed at major hub airports.

So what does that mean for alliances? Even before the pandemic, we witnessed a reevaluation of partnerships and alliance membership. More and more airlines were forming partnerships outside their alliances.

Indeed, it may well be that we have already passed peak alliance and now alliances will progressively become less important as airlines adopt new ways of working together.

If third-generation interlining offers network carriers and LCCs a new way to work together, what are the challenges?

First, the two types of airlines have different DNA and work in very different ways. One of the core strengths of the latest third-generation interlining solutions is the ability to join these two worlds



Patrick Edmond

Key features of third-generation interline solutions

→ There are a number of bonuses airlines signing up to third generation interlining services can expect to benefit from:

- Multimodal: seamlessly supports air, rail, bus, and ferry transport, as well as other travel services such as hotel accommodation and insurance
- Baggage: enables through-checked baggage, with no restrictions as to airline systems and no changes to existing processes
- Disruption recovery: looks after the passenger in case of disruption or schedule change, ensuring they can get to their destination while eliminating customer service complexity and overheads for the airline
- Versatile: able to offer itineraries through the airline’s website or mobile site or via online travel agents (OTAs) and distribution partners using modern interfaces such as new distribution capability (NDC)
- Flexible: available as a white label site or a software development kit for easy integration into an airline’s booking engine, with a range of payment and settlement options



Air Black Box intends to make baggage issues a thing of the past

together with a minimum of complexity, allowing each airline to continue using its normal processes.

For example, an LCC does not have to join the IATA Clearing House or set up an interline revenue accounting function. And a network carrier does not have to change its processes to deal with ticketless airlines - the interlining solution takes care of that.

A big challenge, of course, comes in the shape of disruption recovery. One of the core principles of LCCs is process simplicity; most do not offer connecting flights because connecting flights bring the complexities of delays, missed connections and re-accommodation costs.

But, again, this is one of the significant advantages of third-generation interlining - the interlining provider takes care of all that complexity, facilitating the airlines to

focus on their core business.

Uninterrupted baggage journeys

In the past, checked baggage was a major issue for self-connecting passengers. Passengers had to collect it off the carousel in the transit airport, check it in again for the next flight, and go back through security.

In the case of international passengers, that meant going through customs and immigration too - stressful at the best of times, and even more so when they are trying to make a connecting flight with no protection if they miss it.

Solutions including Air Black Box's uninterrupted baggage transfer service ThruBag make this a thing of the past. Self-connecting passengers can check their bags to their final destination airport and spend their time in the transit airport relaxing, shopping and

using the airport facilities.

In addition, LCCs can sell the ThruBag service as a lucrative ancillary, while full-service carriers can bundle it in with the ticket and offer the same level of convenience as a network airline connection.

We know the post-Covid-19 world will be very different. Airlines already faced no shortage of challenges, and now they are facing an even more challenging environment.

But it is not all bad, as technology is opening the way for new airline partnerships, bringing more choice and convenience for passengers and a new way to grow networks, partnerships, and revenue for airlines.

So amid all the clouds, that is a silver lining worth celebrating.



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Building the American way

US airports could see an infrastructure boost thanks to a new government \$2 trillion investment package, but some have already been using the reduced passenger numbers seen during the Covid-19 pandemic to push ahead with their own projects



At the time of writing at the beginning of June, the vaccination programme in the US continues to perform strongly, with 139 million, 42.3 per cent, of the population having received two jabs.

The successful roll-out has largely been achieved under President Joe Biden's watch after he made it a key focus following his inauguration in January this year.

Now, following his announcement that the US government is making available about \$2 trillion for improving the country's infrastructure and shifting towards greener energy over the next eight years, it seems Biden is also looking to give the US economy another shot in the arm.

The plan was announced in March and must

have caught the attention of everyone working in the aviation sector and who are keen to see US airports receive a boost.

But what does such a large sum mean and how will it be shared out? Of the \$2 trillion on offer, a total of \$621 billion will be spent on roads, bridges, public transit, rail, ports, waterways, airports and electric vehicles.



Allocated sums include \$115 billion to modernise 20,000 miles of road with another \$20 billion set aside for road safety improvements. A further \$80 billion has been allocated to address the repair backlog which has built up at rail operator Amtrak, as well as modernise the Northeast Corridor train line running north from the capital Washington DC to Boston.

When these sums are taken into consideration, it suddenly makes the \$25 billion allocated to US airports seem a lot less generous, especially since that is only \$8 billion more than has been allocated to inland waterways, ports and ferries.

Regardless of how the money compares to that allocated to other sectors, it has been welcomed by Airports Council International-North America

(ACI-NA) which has long been calling for more support for airports which have been hit hard by the pandemic.

President and CEO Kevin M Burke says: “We support President Biden’s infrastructure plan and the \$25 billion he would devote to modernising America’s airport infrastructure.

“We are encouraged the president and his administration are following through on his campaign pledge to improve infrastructure funding for airports. This plan would help the industry continue to focus on safe and efficient air travel by supporting terminal renovations and multimodal connections that would provide affordable access for passengers and workers.

“Investments in aviation infrastructure are more vital than ever before. The Covid-19 pandemic decimated airport finances around the country as passenger traffic dropped dramatically. On top of that, airport infrastructure has long been underfunded, creating a backlog of \$115 billion worth of necessary projects.

“As we taxi towards brighter days ahead America’s airports are ready to take off. These much-needed funds will help US airports build back and create jobs that will support a vibrant 21st century economy.”

Burke says the extent of the damage Covid-19 has wrought on the aviation industry, which supports \$1.4 trillion in annual US economic output and 11.5 million jobs annually, has been profound.

He adds a report recently released by ACI-NA addressing the country’s urgent need for investment in the aviation sector shows that airport finances have been devastated as passenger numbers fell by up to 96 per cent in 2020 compared to 2019.

Worse yet, passenger traffic numbers aren’t projected to return to pre-pandemic levels until 2023 at the earliest, meaning airports face at least another two years of pain with billions of dollars more in lost revenues.

However, the report adds even before Covid-19 closed the skies airports were suffering from chronic underfunding, meaning any money available was spent on immediate needs like maintenance of the current systems and structures rather than on long-term plans.

This has led to the creation of a \$115 billion



US airports have been emptied by the pandemic

backlog in planned and much-needed larger projects to fully modernise facilities as well as create extra capacity.

“There are also tens of billions of dollars in additional projects that have been delayed or cancelled due to the pandemic and economic recession,” the report says.

Long-term funding failure

However, the report states while the pandemic may have caused the most immediate pain, it adds problems date back to 20 years ago and the failure by the US government to modernise a key funding mechanism for airports.

It says the Passenger Facility Charge (PFC), which is a fee levied on passenger tickets with the money raised supposed to be invested in

airports, was last raised 20 years ago from \$3 to \$4.50.

During the same period, the report adds, construction and other related costs have continued to rise; meaning the value of the PFC has fallen by 40 per cent.

And it is this discrepancy that must be put right as the report argues that the PFC is the best way to fund infrastructure, as it responds to both local circumstances and the travelling trends at different airports.

It adds that airports should be able to set the charges according to local demand while it is also the fairest way to pay for any improvements as it is the passengers using the airports that pay directly for them.

The report also argues that making the PFC more flexible could even drive down ticket prices, as extra capacity fuels competition between airlines while much of the money raised would go back into the local community thanks to the ensuing employment of the local workforce.

“Airports are a community’s gateway to the world, and they can be its gateway to growth as well,” the report says. “Funding infrastructure the right way will inject money into local economies and help all of America keep up with our constantly changing, increasingly interconnected world.”

Airports continue to build

Regardless of when the money arrives or where it comes from, airports in the US

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have been pushing ahead with their own developments, with some saying they have benefitted from the reduced passenger numbers seen during the pandemic by speeding up their own projects.

One such facility is New York's LaGuardia Airport, where work on Delta Air Lines' new terminal has progressed so quickly that the new arrivals and departures hall, the new road network and the second concourse will now open to customers next spring.

A further half of the third concourse is expected to open in the summer while the entire four-concourse terminal is expected to be fully complete by the end of 2024, eighteen months earlier than originally planned.

NY Corporate Real Estate managing director Ryan Marzullo says: "We have been able to take advantage of the downturn in passenger volume and flight activity to capture additional

real estate and advance our LGA construction more quickly, as we have at most of our hub airport projects across the country.

"Our priority when we're constructing these new terminal facilities is to protect our operation, our customers and our employees, while building as efficiently and quickly as possible."

John F Kennedy International Airport is also set for expansion after Delta recently agreed to revised plans with the Port Authority of New York & New Jersey and JFK International Air Terminal, the operator of JFK Terminal 4, to expand it and consolidate Delta's operations there.

Further south, Tampa International Airport has also been taking advantage of the downturn in passengers and last year announced it was making quicker headway than planned on four projects, including eight new express curbside

"We are starting to see a significant uptick in passengers as people feel more comfortable travelling."

Balram B Bheodari

Interim airport general manager,
Hartsfield-Jackson Atlanta
International Airport



Island strife?

The Caribbean has been largely closed down as Covid-19 spread across the world. Now, as the region opens up to both domestic and international travellers an opportunity has emerged to resume services with far fewer boundaries

About 18 months after Covid-19 first hit the global headlines and shut down the world, it feels odd to think back to that time when the pandemic was first gathering pace.

And perhaps what is most astonishing is how quickly the event went from being a distant problem in China for most people to a serious threat to everyone, forcing governments into a series of tough responses as they sought to contain this global pandemic..



Indeed, interCaribbean Airways CEO Trevor Sandler puts it very well when discussing the issue on a Caribbean islands panel as part of the online CAPA Live event which was held in May.

“We’re a little over a year now since Covid-19 took over our lives and in the space of roughly one week, almost every country in the Caribbean was quickly closed down,” he says.

“It almost seems comical that we considered that everyone will close down for two weeks

and this great virus was going to go away. Of course, we quickly learned that it’s not going away, anywhere or anytime soon.”

Sandler adds as the Caribbean went into lockdown so, like the rest of the world, each country adopted various measures and rules concerning international arrivals unique to their own situations.

While this wasn’t necessarily a huge problem at the peak of the pandemic, he adds it is

now that the differences are becoming deeply problematic as the world reopens and airlines find themselves being forced to adapt to an entirely different, and ever-changing, landscape.

Sandler says: “Across the Caribbean we have seen a completely different mixture of requirements, from Covid-19 tests (required by the welcoming country) before you come in, tests when you arrive or a test so many days later.



The Caribbean depends on airlift to bring international visitors to the region

“At one point there was even (a requirement for) a test for you to leave one of the countries we serve.”

And it is the cost of the testing, without even considering quarantine regulations, that Sandler argues has deeply impacted the Caribbean’s aviation market, adding: “It meant the bottom (of the market) basically fell out. So while we have countries that opened, we quickly rolled back into some form of semi-closure.”

This is a considerable problem for a region where air travel is critical for inter-island connections as well as bringing in tourists. CAPA’s own figures show that tourism accounts for \$36 billion in GDP contribution and 1.6 million jobs.

Similarly, in 2019 CAPA data shows the Caribbean had as many as 540 city pairs across the world and while 423 were lost at the peak of the pandemic, there are now about 315 in place – less than 60 per cent of the pre-Covid-19 era.

Changing strategies

The impact on the region’s airlines was similarly stark Bahamasair CEO Tracy Cooper

adds, especially since it was so unexpected in an industry that seemed set only for growth.

He says: “As with most airlines during 2020, Bahamasair had to take a serious look at its operations because before 2020 we were always concentrating on revenue concerns; we always thought we could outgrow and outpace – just simply put on more seats and everything will be fine.”

Instead, Cooper adds 2020 saw the airline refocus on costs and lose two aircraft, reducing its fleet to 10 aircraft.

Having weathered the storm he says the airline is beginning to see a return to growth, albeit off 2020’s heavily depressed figures, and he expects more thanks to the Bahamian government’s implementation of new rules and testing procedures for both international and domestic travellers.

Cooper says: “At the end of 2020 we were at about 30 per cent of our frequency rotations in relation to pre-Covid-19. Right now, going into summer we’re going to be around 65 per cent. “We’re not going to be 100 per cent but the

growth is encouraging. We’re in line with what the aviation industry is projecting”

InterCaribbean’s Sandler is also predicting growth for 2021 as he focuses on restoring many of the airline’s 343 city pairs that were being operated before the pandemic struck.

However, both argue that in order to facilitate a proper recovery, the Caribbean needs to operate as one when it comes to dealing with Covid-19 in order to resume direct services between the different islands.

Sandler says: “It’s very much about enabling the Caribbean traveller to get around the Caribbean without having to come to Miami or go to Panama.

“Throughout this Covid-19 window of restoration we’ve seen enormous amounts of people who were literally connecting via five, six or seven airlines in order to get to a point in the Caribbean.”

Cooper adds: “Intra-Caribbean travel is becoming much more important than it was in the past and this is because we are finding



synergies between ourselves in the Caribbean.”

Coordination failure

Caribbean Tourism Organisation chairman and Barbados minister for tourism and international transport senator Lisa Cummings agrees that the Caribbean suffers from a lack of coordination in fighting Covid-19.

While she admits this is then causing problems in a proper restart of the region’s aviation sector, she argues the Caribbean is no different to the rest of the world as each island deals independently with the threat.

Cummings adds: “I’m not necessarily saying that the Caribbean countries could not or should not have better coordination mechanisms, but we’re not dissimilar from any other region of the world, where each country has had to make an individual decision based on their own unique circumstances.”

She adds beyond dealing with the Covid-19 recovery and the reopening of borders to one another, there are a number of conversations that need to be held over taxation and state support for both airlines and airports to

ensure a strong recovery across the Caribbean.

More importantly, she believes a solution is already available for easing up intra-island travel for international visitors coming to the region.

Cricket solution

Cummings says during the Caribbean’s hosting of the Cricket World Cup in 2007, legislation was introduced across the region for the hosting period allowing for simplified travel for international visitors throughout the Caribbean having entered via one country.

She adds the spirit of the past legislation is already being revisited as she has begun working with tourism ministers from across the Caribbean to allow cruise ships greater freedom of movement once they are in the Caribbean.

Cummings says: “Cruise ships function on visiting multiple destinations already by definition and so it made it easier for us to start there and then move ultimately into air travel. That absolutely has to be a critical part of our conversation in order to enable movement throughout the region.”

And it is this idea of working together that attracts the agreement of both interCaribbean’s Sandler and Bahamasair’s Cooper in regards to ensuring the Caribbean’s exit from the Covid-19 pandemic is not only unilateral but also profitable.

Sandler says: “We need to actually sit at the same table and discuss the views we’re speaking of today. What is it that we can do collectively to move any obstacles that get in our way of increasing connectivity and what are the obstacles to increasing airlift?”

Cooper agrees, adding: “You have to have a good relationship wherever you fly to make this work. Each country is unique in their approach as to what they consider to be normalcy.”

If the Caribbean’s countries are able to sit down and come to an agreement over future airlift between the islands that leaves everyone happy, that would indeed be a miracle that no-one sees coming.

But given at the beginning of 2020 no-one really saw the global pandemic that was just beginning to spread across the world, perhaps now is the time to implement serious change to help the tropical paradise build back better.

“You have to have a good relationship wherever you fly to make this work. Each country is unique in their approach as to what they consider to be normalcy.”

Trevor Sandler
CEO, interCaribbean Airways



Staying in control

Dubai Airports boss Paul Griffiths is proud the facility has stayed number one for international traffic but admits the airport will need to change to retain its place

It's hard to know whether the ongoing Covid-19 pandemic is the cause behind changes in the aviation sector, or simply an accelerant for trends that have already taken root.

Whichever it is, many airports and airlines have used the downtime caused by the suspension of operations to not just rethink them but also their entire business models as consumers prepare to return to the skies with new demands.

This has definitely been the case at Dubai International Airport, which has held

the top spot for handling international passengers since 2014 when it first overtook Heathrow Airport.

While it has suffered as much as other airports around the world, the CEO of Dubai Airports, which is responsible for operating the facility, Paul Griffiths is proud it has maintained the top spot when it comes to international travellers.

Speaking at the online CAPA Live event in May, he says the airport witnessed a 67 per cent fall in Q1 in passenger numbers with between 1.5 million and 2 million passengers

per month using the facility.

This equated to 5.8 million movements in the first quarter, compared to more than 20 million in a normal period.

As a result, Griffiths says Dubai is operating to 63 per cent of total destinations in 89 per cent of the countries normally served, while three quarters of its total pre-Covid-19 airlines are currently using the facility.

While he admits the impact has been hard, it is no worse, and in some cases considerably better, than the circumstances



other airports find themselves facing.

He says: “We are still on greatly reduced numbers, but our numbers aren’t going south quite as quickly as some of the other airports. So we’re still number one (in handling the most international travellers), something that we intend to keep through thick and thin.”

Changing consumers

But in order to do that, Griffiths admits he needs to be sensitive to the changing mindset of consumers, who he believes are already changing their travel habits as a result of the Covid-19 pandemic.

He says: “One thing we’ve seen, obviously driven by the pandemic, is a huge shift towards the origin and destination traffic. Dubai’s now seen as quite a desirable destination and people are coming here to stay for the long term.”

Griffiths adds when they do come, it is less likely to be for a holiday, but more often as remote workers who simply need a good internet connection in order to live and work in another country.

While he is pleased to see the emirate being considered as a destination in its own right, he is also keen to maintain the airport’s other key market of transfer traffic which he believes remains core to the airport’s future, albeit with a slightly different flavour than what has been seen before.

Griffiths says: “The transfer hub will be stronger than it was before, when the pandemic starts to recede, that’s definitely the case.

“What will happen over time is that there’ll be more secondary markets served by smaller aircraft feeding the hub and, as we emerge from this, you’ll probably find a lot more than the 200 unique destinations that are served by EK (Emirates) and FZ (flydubai) pre-pandemic emerging.”

He argues this trend will be further driven by the return of the Boeing 737 Max, which will bring many long-haul destinations into the range of the single-aisle aircraft and so force the airport to pivot in order to meet the new demand.

Griffiths says: “This is an immense opportunity actually for us to solidify the close collaboration between Emirates, flydubai, and Dubai International to really rebuild an incredibly strong connecting hub.”

He adds flydubai has a strong future at the airport as, while it currently operates 14 of the 737 Max aircraft, it has a further 237 on order making it the second-largest customer for the aircraft in the world.

Slot availability

He also argues that while the airport’s key connection periods, which take part in three distinct waves, 6am-9am, 12pm-3pm and 10pm-2am, remain mostly full, there is plenty of time to slot in further connecting flights.

Griffiths says: “In those gaps in between, that’s an ideal time for the higher frequency, shorter haul routes to come in because of course, they can depart between those waves and still feed

those waves and operate a very high-frequency point-to-point network.

“We’ve got huge capacity here because we’ve worked on wringing out every single last drop of capacity from every element of our supply chain to be able to feed that enormous operation.”

To this end, he says on the north side of the airport there are many smaller capacity stands although the airport has the capacity to accommodate a wide range of aircraft.

Griffiths adds: “Because we are 24/7, we’re working very hard on getting our runway movement rates up and we’ve covered every single square inch with concrete and stands, to be able to park all these aircraft.

“But actually, as the hub grows, ground time will decrease. So the ability to put more flights on, to compress the ground times, and to offer higher frequency, is by getting aircraft in and out more quickly; that will provide us with an increase in capacity.

“Before the pandemic, we had a master plan signed off to take Dubai with its two close parallel runways to 120 million passengers per annum, which is a hugely productive number.”

While handling 120 million passengers a year in the current circumstances appears to be optimistic, Griffiths argues the first steps back to normality in the aviation sector will be through bilateral agreements like Australia’s and



Paul Griffiths

The Airbus A380 will become a rarer sight at Dubai International Airport



New Zealand's, which allow for unhindered travel between the two countries.

However, like many others in the aviation world he believes the process of reopening international barriers and allowing the resumption of flights is not going fast enough.

He says: "Understandably governments are being very hesitant about that and only take those steps once it's safe for them to do so. You can't say that's the wrong thing because protecting one's domestic population has to take precedence over global mobility.

"But there becomes a point where risk avoidance has to turn into sensible risk management and, in a lot of countries, we must be at that inflection point pretty soon."

Which might be the case, but whether or not governments are as capable of rapid change as the aviation sector has proved to be in the last 14 months remains to be seen.

Injecting success

→ Vaccinations will be the key to unlocking the world and allowing travellers to take to the skies again.

Speaking at the online CAPA Live event in May Dubai Airports CEO Paul Griffiths describes the successful vaccination of the world's population as the "long-term goal", adding countries with the most advanced vaccination programmes are now the least impacted by Covid-19.

However, with just 13 per cent of the world's population vaccinated at the time of speaking, he believes any return to normality is some way off, although some countries are set to open quicker.

Griffiths says: "I can see the next step in risk management of this will be only to allow

people to enter certain countries that have had the double shot of particular vaccines authorised in that country.

"Effectively, what we need to make sure of is that the aviation industry is presenting arrivals in a country that present no more risk than the people who are already living in the country."

Griffiths also believes the best way of ensuring this happens is through better data management, a process he believes to be well under way despite many people's concerns over both the security and misuse of their data.

He adds: "I'm convinced now it is impossible to escape the global commoditisation of personal data."

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Cape of Good Hope

Despite having suffered as much as any during the pandemic, Cape Town International Airport has a number of advantages that could drive a strong recovery



If 2020 was the year that the world closed down in the face of the Covid-19 pandemic, then we must hope that 2021 shows a return to normality as vaccination programmes roll out globally.

However, with different levels of success occurring thanks to varied levels of vaccine availability and effectiveness, as well as new variants of Covid-19 potentially undermining programmes, imbalances are inevitably occurring between countries in fighting the virus.

And this is continuing to have an impact on governments around the world as they slowly reopen their international borders, so

allowing airlines to fly again.

This has led to some optimism in South Africa, where Wesgro's Cape Town Air Access project manager David King believes the country is on track to fully reopen its borders to travellers by the winter 2021/22 season - sooner than many other rival southern hemisphere destinations.

Speaking to an OAG webinar in May on how airports are continuing to deal with Covid-19, he says: "If we continue on this train (of recovery) then South Africa remains open and we will have an inch on most of the southern hemisphere, as Australia is still



David King



closed and Brazil is still struggling. “Then we’ve got a great opportunity to capitalise on the traffic once people travel south during the winter.”

King says one example of this is ongoing discussions with TAP Air Portugal over the introduction of a new route connecting Lisbon to Cape Town by November, and adds other new routes could be announced soon as a result.

He says: “We’ve seen a lot of interest from airlines that flew (from Cape Town) before this and we also have some interesting opportunities where we’ve been approached

by some other airlines.”

The growth in international routes would undoubtedly be welcome as OAG’s own figures show how Cape Town’s air network was, in May 2021, effectively half the size that it was in the same month in 2019 before the pandemic.

The total number of seats fell from 18,085 to 9,980 as flight numbers dropped from 115 to 70, with seven fewer airlines operating from the airport than the 17 it had on its books in May two years previously.

The number of countries served by Cape Town International Airport is now at eight, five less



John Grant

than in 2019 while the number of routes has fallen from 27 to 17.

Domestic boost

Like any other airport, King adds the domestic routes have come back quicker due to fewer restrictions on domestic flying, with the airport hoping to have 13 up and running again by June this year.

He says the domestic sector has also received a considerable boost from the launch of another route connecting Cape Town with Johannesburg by start-up, domestic LCC Lift Airlines in December.

King believes the airline has proved to be popular thanks to its new ticket-pricing structure which has been created in response to the uncertainty of travel during the pandemic and allows passengers to cancel or change flights with limited extra charges.

He says: “They are trying to be flexible, they call themselves the Google of airlines in South Africa and I think the innovation is really working and they’re doing very well.”

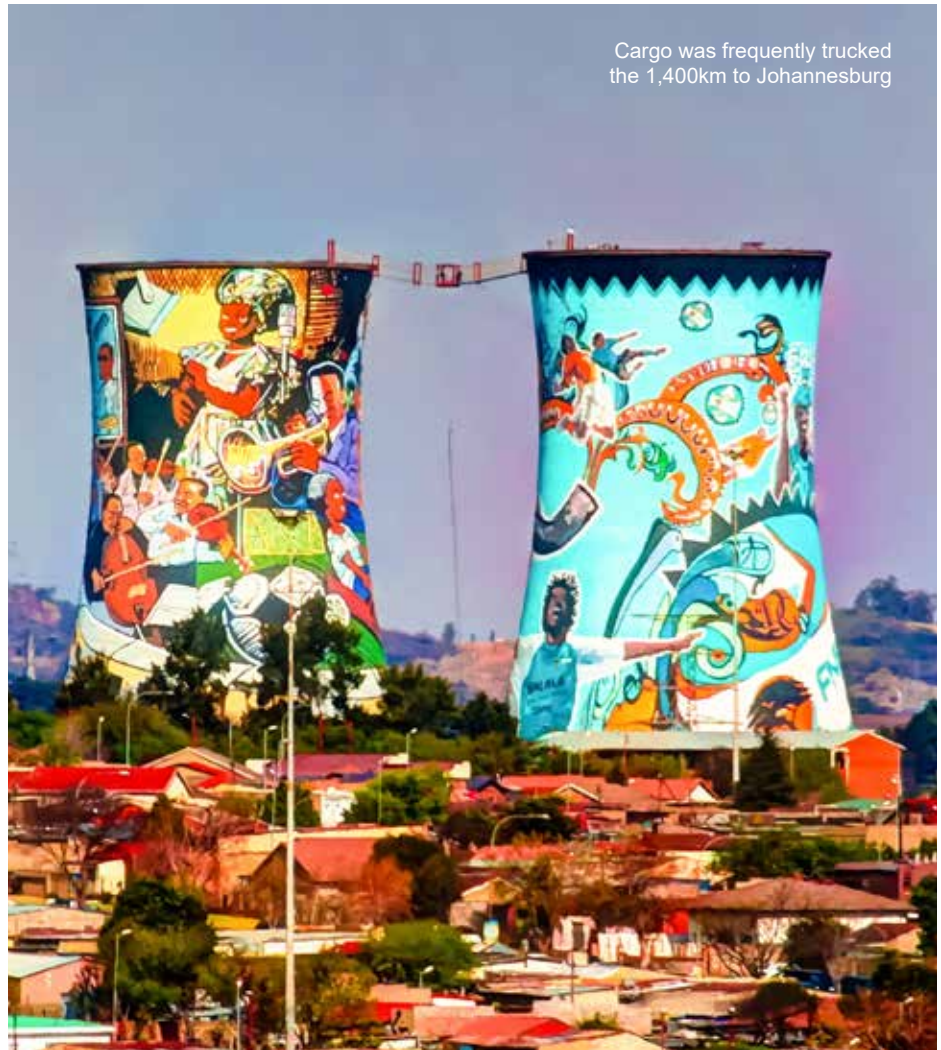
King adds the recovery in domestic flights ahead of international travel is equally visible in the passenger numbers, with the first two weeks of May 2021 showing domestic numbers were at 66 per cent of pre-Covid-19 levels, compared to just 18 per cent on the international side.

However, any anticipated growth will need to be balanced against policies undertaken by Airports Company South Africa (ACSA), which regulates fees across the country’s airports and which King says has begun increasing charges having frozen them during the pandemic.

He adds ACSA has also been forced to delay plans to upgrade Cape Town airport with a new runway, realignment of the current runway, improvements in the international terminal and the doubling of capacity at the domestic terminal for the next “four to five years”.

King says: “They are reliant on the income and revenue they receive so it’s a bit of a catch-22. I would have loved it if I could have gone ahead and done these upgrades during this off time to be ready when things pick up again.

“But I understand that it has to do with how much money you can generate and



not putting yourself in a position where you become financially unsustainable.”

Cargo lifeline

Like the rest of the world during the pandemic, King adds one bright spot has been the growing importance of cargo which has allowed airlines to continue operating in situations where passenger numbers alone were no longer holding up.

“With a 30 or 40 per cent load factor, you’re not making any money,” he says. “But airlines are actually covering some of their expenses with the cargo they’re carrying and a lot of them have told us it is giving them some hope in this time.”

King says for the last five years the airport has been working on growing cargo capacity, adding: “It’s all about creating the environment where people are aware of what’s going on.

“The exporters and shippers usually had

to truck everything 1,400 kilometres up to Jo’burg to get it exported but we now have this opportunity in Cape Town to really work on our cargo capacity, but there’s still a way to go.”

Of course, King admits the plan has been hit by Covid-19 and the ensuing decrease in overall belly capacity which has seen the airport’s cargo revenues fall, but he remains optimistic that new opportunities can be found.

“Cape Town is huge on seafood exports, on flowers and on fruit that needs to get to the market quickly,” King says. “So we’re working closely within Wesgro as well as with our export promotion team to push this to the forefront.”

So again, while the old ways of doing things have been heavily disrupted by the Covid-19 pandemic, there are new opportunities emerging, and it is King’s optimism in exploiting them that we must hope drives a recovery in commercial aviation that the whole world can ultimately benefit from.

LCC Lift Airlines commenced operations in December 2020



2021 perfect time for new airline launch

→ Now is the optimum time to set up a new airline despite the ongoing Covid-19 pandemic, which laid waste to the world's commercial aviation sector and could yet cause more airlines to fail.

Speaking on the OAG webinar recorded in May and which addressed how airports are continuing to cope with the crisis, OAG senior analyst John Grant admits the sector faces many challenges, from the second wave hitting India to the collapse in the North Atlantic routes which has forced Norwegian to reincarnate itself as a short-haul airline.

However, he argues this has created the best possible conditions for anyone considering setting up a new airline.

Grant says: "This really is a strange industry, isn't it? For all of the trials and tribulations in the last 18 months, as we've said from early on there has never been a better time to start an airline.

"There are plenty of aircraft, trained employees, crews and some airport slots available, even if they're only on an ad hoc basis."

Despite his optimism for anyone new planning to enter the sector, Grant remains concerned about the future of many established airlines as they are left in the dark about what will happen in the next month, let alone beyond the forthcoming summer season.

He says: "Airlines have as much visibility over the future as you and I, they're getting no guidance from the regulators and there's no consistent policy being projected from global organisations."

This means that scheduled capacities are only operating at 58 per cent of 2019 levels (this year) until September 2021. However, while this may be double last year's levels, Grant is not convinced that the predictions will come true.

He says: "We don't think those current capacity levels for July are likely to be realised unless there is a significant movement in the relaxation of quarantines and travel protocols."



New dawn for third runway at Heathrow?

Heathrow Airport's CEO John Holland-Kaye is again calling for capacity growth as Brexit becomes the latest issue to highlight the need for more space

The boss of Heathrow Airport is again calling for an increase in capacity, inevitably with the construction of a third runway, at the facility in order to help the UK achieve its post-Brexit aims.

The saga of Heathrow's potential growth

is a long-running one, with arguments for the construction of the runway both loud and dating back to the 1990s. Most recently in December 2020, the UK's Supreme Court overturned a previous ruling by the Court of Appeal blocking the third runway, meaning the

arguments over the project can resume.

Speaking at an online CAPA Live event in June, Heathrow CEO John Holland-Kaye again argues that without the additional capacity afforded by the new runway, the UK's post-Brexit future



would be an uncertain one.

He says: “The UK has left the EU. We’re trying to carve a role as a global trading nation independently, and we need to have a leading hub airport here in the UK to provide the trade links and supply lines that the country will need for the future.

“We need to be as well connected to China and India as we are to the US; in fact, we need more connections to US if we are to play a role right at the heart of the global economy, and we can only do that with more capacity here at Heathrow.”

Holland-Kaye adds there is demand for the extra capacity from both airlines

and travellers and it would be best for the work required to start as soon as possible in preparation for when passengers return in any volume.

And the airport needs a lot of passengers to return. As a result of the UK-government lockdown, which essentially put the brakes on all but the most essential travel and even banned travel to some countries, so Heathrow’s traffic numbers have fallen through the floor.

The airport has gone from handling about 1,400 flights a day to 400, while passenger numbers have dropped by about 90 per cent from 225,000 on a daily basis to 20,000.

Juggling slots

In the meantime, Holland-Kaye believes the best way to manage Heathrow’s capacity is through the better use of the slots that are already available and allocated to airlines.

He admits that the current slot waiver programme, which has meant airlines aren’t forced to use their allocation or hand them back as they would be in normal times, has been a helpful tool for airlines during the Covid-19 pandemic and is likely to be extended into the forthcoming winter season.

But he adds airlines could be quicker to return slots they no longer want to the airport to help it deal with the ongoing capacity constraints.



John Holland-Kaye

Holland-Kaye says: “I would like to see airlines handing back slots earlier so that we can use them and make the most of the capacity we have here, because there is demand for people to be able to fly to markets that aren’t currently served.”

Should airlines start giving up their slots in serious numbers, Holland-Kaye adds it could free enough capacity to tempt a sizeable LCC like easyJet to start operating out of Heathrow.

He says: “The fact that LCCs want to come into Heathrow as it is says a lot about the value that we bring to airlines.”

Nor does he believe it would be too difficult a job to change how Heathrow operates to accommodate LCCs, saying the airport has just spent 20 years accommodating the giant Airbus A380 on behalf of various airlines.

Holland-Kaye says: “If airlines are looking for more remote-served services, rather than the pier service which historically airlines have wanted to have at Heathrow, then there are ways we can meet that demand, but we don’t have enough demand yet to significantly change the model.”

Carrying cargo

Finally, like all airport bosses operating in the Covid-19 pandemic, Holland-



Heathrow boss defends latest passenger charge

→ Heathrow Airport boss John Holland-Kaye has defended charges levied on travellers in the wake of Covid-19 which has left it handling about a 10th of normal passenger numbers.

Speaking at the online CAPA Live event in June, the CEO says the long-running argument over Heathrow’s operating costs for airlines and travellers was most recently reignited by the introduction of an £8.90 fee levied on all departing passengers from April.

However, he argues airlines get a very good deal from the airport which has privately invested £16 billion in the facility but has been forced to rethink the way it is financed having seen daily passenger numbers drop from 225,000 a day to 20,000 thanks to the pandemic.

He adds: “We provide tremendous value for the airlines, but all of our income depends on passengers coming through and while there are no passengers, then we have no income and no way of paying for that long-term infrastructure investment.”

Holland-Kaye says the decision to levy the new charge on passengers was also made following advice from airline customers.

He says: “We had proposed to them (the airlines) to deal with things in a different way that wouldn’t directly go to passengers. This is what they chose for us to do.

“So we’ve gone along with that because, of course, we always like to come to an agreement with our airline customers about the best way to deal with these things and that is working very well.”

Holland-Kaye also argues that anyone choosing to travel at the moment will find the £8.90 cost minimal compared to other additional, Covid-19-related expenses.

He says: “It sounds like a lot of money in the normal world, but at the moment only people who are desperate to travel, can afford to travel and afford the hundreds of pounds that they have to pay for testing are travelling anywhere.

“So it’s a relatively small part of our journey, but it makes a small contribution to keeping the airport going at a time when we have almost no revenue.”

Holland-Kaye says the airport normally costs £1.2 billion a year to run and while cost reductions have been made during the pandemic, bills still need to be paid.

And he also points out that airlines have been quick to rise prices for the customer when given the opportunity, most recently when the UK government allowed leisure travel to Portugal for a brief window.

Holland-Kaye says: “Bear in mind that when Portugal was opened up, airlines were able to double their charges because of so much demand for people to get into Portugal.

“As a regulated business ourselves, we can’t do that. Our prices have actually come down this year to airlines in spite of everything else that is going on. So that is just the way that the market works.

“Airlines have more opportunity to make more money in the good times than we do, but we do need to be able to fund this enormous investment we’ve made in a world-class asset here at Heathrow.”

Kaye has been very grateful for the continuing lifeline that cargo has offered, albeit not as much as at some other European airports.

He says following the reduction in belly space after airlines pulled their flights, the amount of cargo handled by Heathrow fell by a quarter compared to 2019 levels.

Despite this, he adds: “Heathrow is the UK’s biggest port by value of any kind of port, not just of aviation.”

However, a drop of a quarter in cargo volumes at the airport is considerable and causes Holland-Kaye to worry that in the wake of Brexit, the UK’s economy is again being held back at a deeply unhelpful time.

He says: “This is a real issue for the UK economy. That cargo represents UK exports getting around the world and imports coming in here to feed our supply chain.

“Until we see those cargo routes re-established and the passenger routes in particular that support them, then the UK economy is going to be held back.” Of course it’s fair to say these routes



Cargo has been a lifeline for the airport

could come back even more strongly with the addition of a third runway which takes us full circle back to the airport’s biggest issue before 2020 began.

But how nice to think back to a time before the Covid-19 pandemic struck and visited so much tragedy upon humans in every corner of the globe.

Heathrow calls for global agreement on SAF

→ Heathrow Airport is urging governments around the world to commit to a global agreement on greater use of sustainable aviation fuel (SAF) in order to make aviation greener.

Speaking at the online CAPA Live event in June, the airport’s CEO John Holland-Kaye says only global backing of the alternative fuel source will lead to the investments required to make it readily available around the world.

He believes this will allow the aviation industry to ensure 10 per cent of all fuel used is made up of SAFs blended with kerosene by 2030, before hitting the target of 50 per cent by 2050.

Holland Kaye says: “Climate change is a real issue that all of us in aviation need to tackle. And if we don’t, then we’re not going to have an aviation sector in 30 years’ time.

“Fortunately, many of us are now getting behind this and getting on with a plan to make it work and the answer, particularly for long-haul flights, will be to commit to net-zero.”

“We’re pushing for ... a global agreement on this and a common mandate across governments for meeting those targets for SAF use, because that will unlock the investment that’s going to be needed of hundreds of billions of dollars to supply the sustainable aviation fuel we will all need.”

He adds Heathrow has already had its “first major shipment” of SAF and while the whole process has gone smoothly, he believes further scaled-up production will make it even easier.

Holland-Kaye says: “I should give credit here to British Airways and IAG, Virgin Atlantic and the US airlines, which have really taken the lead in committing to net zero and to these targets of 10% by 2030.

“Now we need to see other airlines around the world making similar commitments to make it easier for their governments to sign up to a global agreement next year.”



Securing future connections

The implementation of open architecture in airport security has a number of challenges to overcome but will ultimately play a significant role in future operations, argues Smiths Detection's global director aviation Richard Thompson

The open architecture (OA) approach is gathering momentum in the aviation industry and is set to disrupt the status quo for airport security systems design, installation, operation and maintenance.

OA, also known as 'open platform', is a design principle which enables the interoperability and interfacing of security screening hardware, software and algorithms from different suppliers

within one solution. Open architecture can be applied to checkpoint systems and hold-baggage solutions as well as cargo scanning equipment.

Typically, airports partner with one or two security screening suppliers on a checkpoint or hold-baggage system, but by allowing hardware to talk to new software, OA essentially creates more choice for airports by allowing new

components to be incorporated into their screening systems.

Although still in its early days, OA interest is growing because of the significant benefits it has the potential to deliver to airports and regulators.

Those benefits range from quicker adoption of advanced technology capabilities to the possibility of increased

knowledge sharing between airport and security authorities around the world.

A new approach

While it is already standard practice to integrate lanes and scanners from different suppliers, the integration of software is a new concept. The idea of OA has emerged against a backdrop of increasingly complex security threats and greater availability of technologies like artificial intelligence (AI).

Airports are looking to enhance their systems to ensure that they can adapt to meet these new threats as fully and as quickly as possible while creating competitive advantage.

As outlined in a paper prepared by Heathrow Airport and Avinor AS called *Open Architecture for Airport Security Systems*, OA provides “new entry paths for collaborators”, which is essential for ensuring the best technologies from “tomorrow’s software developers” can be integrated into airport security systems.

By opening up existing hardware solutions, security systems can be easily and cost-effectively upgraded with the latest detection algorithms and software on the market, not only improving the security outcome but operational efficiency, passenger experience and overall agility to be able to meet new operational requirements and regulation.

OA platforms can also increase data sharing and collaboration between airports to tackle threats more effectively on an industry-wide and global scale.

Systems that are more open and compatible can better utilise Digital Image and Communication in Security (DICOS), a standard that supports the sharing of X-ray images and related data.

Sharing screening results between departure, transit and arrival airports not only boosts safety around the aviation network but significantly increases operational efficiency by potentially removing the need for rescreening at each airport.

While airports are heavily focused on how

this new approach can be best leveraged, there is still no agreed industry best practice for how OA should be adopted for security screening.

Responsible deployment

The performance and compliance of a screening system and all its components, from the hardware to the algorithms to the networks, can never be compromised.

Screening and image sharing are regulated and often classified functions, so an industry standard for the responsible deployment of OA is critical.

A responsible approach is one that mitigates risk while achieving the desired result of increased flexibility and associated benefits.

Industry stakeholders are therefore currently exploring how the benefits of OA can be unlocked in a way that does not compromise the effectiveness, operational availability or the integrity of screening data.

The issue is that there are several challenges to deploying OA while at the same time ensuring peak performance of a screening solution.

These challenges range from the technical to the regulatory to the commercial and while there is steady progress, there are currently as many questions as there are answers.

Introducing risk

Perhaps two of the greatest concerns with OA are around cybersecurity and intellectual property (IP) loss.

Configuration changes can create network vulnerabilities and increase the risk of cybersecurity attacks, while open interfaces with third parties may weaken cyber-hardened components of a security screening system.

As a rule, the more open a system becomes the greater the cybersecurity risk. Added to this are suppliers’ concerns about potential IP loss.

The process of adapting hardware to be compatible with multiple third-party products requires close collaboration



Richard Thompson

and the sharing of commercially sensitive information.

This and related issues are being addressed by an industry working group – a potential result being a model framework of agreements or contracts.

Achieving interoperability

While the integration of hardware from different suppliers is not uncommon, there still needs to be a standard solution for how lanes and scanners are interfaced so that hardware interoperability is easily achieved and the system operates reliably.

Screening system manufacturers understand the complexities and ramifications of interoperability which can often make them best placed to bring together airports and third parties to develop algorithms, but when it comes to the transfer of images and data between hardware and new software there are still a lot of unknowns.

For example, some software developers have produced detection algorithms which require access to image data in a standard format.

To solve these issues standard specifications must be agreed across the industry. In this instance, adoption of the DICOS standard is one approach to solving this issue.

Ultimately, interoperability is contingent on robust software. This means that technically there need to be assurances on the quality of the software, to ensure that there is no latency related to providing analysis results.



Effective open architecture seeks to minimise queues at security

Removing regulatory barriers

OA also presents complexities for regulatory approval. The issue is around certifying combinations of screening systems with third-party detection algorithms, given that unauthorised connections and interfaces with certified equipment are not guaranteed to be compliant.

In this scenario the regulatory process would be a likely bottleneck, with each new algorithm requiring certification in combination with different pieces of the relevant equipment.

The requirement for regulatory approval would therefore remove the benefit of OA in enabling the speedy adoption of new detection algorithms, and it would be extremely difficult to ensure regulatory compliance throughout the lifetime of a system, during which there are likely to be many configuration changes.

For OA to be viable, more flexible certification processes would need to be considered. For example, certification of a system in its entirety could be granted, as opposed to certifying each individual interface.

Taking responsibility

With multiple supplier components incorporated into a singular system, it is

not clear who would be accountable for the overall performance of the system and oversee maintenance, support and repair.

Currently original equipment manufacturers are responsible for the supply and maintenance of certified screening equipment, providing classified data protection and ensuring electrical and mechanical safety as well as electromagnetic compatibility (EMC).

Contractual obligations include equipment 'up-time', system availability and lifetime management of the products.

With OA there is a risk of software upgrades to individual components causing other components to malfunction. In that scenario, it is hard to say who would be responsible for rectifying the malfunction.

The most practical approach is for the role and responsibility of each party to be agreed – with overall accountability being given to one organisation, whether that be the OEM or the airport itself.

There also needs to be an appointed responsible authority for vetting third-party algorithm developers, as technically there need to be assurances on the quality and robustness of the software.

The way forward

The rewards of OA are clear: greater flexibility to integrate the latest technologies into one screening solution to tackle threats and meet new operational requirements more effectively.

However, the risks of implementing OA in practice are also evident. To address these risks, it is essential to establish a common set of standards to ensure open architecture platforms operate securely, safely and compliantly.

The good news is that the European Organisation for Security is actively involved alongside the air transport industry and regulators in establishing an agreed approach to OA.

At Smiths Detection, we are increasingly playing a co-ordinating role between stakeholders, utilising our system interfacing experience to advise on best practice.

It is only through working closely together to agree an industry-wide set of standards that the risks can be mitigated and the benefits of OA fully realised.

Ultimately, OA can pave the way to a more integrated and secure airport network, but only when delivered responsibly.



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Emerging from the pandemic

Menzies Aviation is focusing on cargo and emerging markets as the world begins a slow return to normality in the wake of Covid-19

The increase in cargo operations Menzies Aviation is seeing all over the world could be instrumental in driving the growth of its ground handler services.

Executive vice president Middle East, Africa and Asia Charles Wyley says the ground handler has now broken the 50 station mark for cargo operations, having grown from 36 to 53 in the last year.

While the growth has meant Menzies has been able to penetrate new markets, including Pakistan and Iraq, he is also confident that the company can use the stations as a showcase for its operations,

with the aim of then signing contracts to provide other complementary ground-handling services.

Wyley says: "If we can look at cargo going into the airport first and then those aircraft that come in, they need a ground-handling aspect. The aircraft needs fuelling and the aircraft needs to be serviced from the ground from a safe, secure operation."

But he also admits the strategy of growing the number of cargo stations Menzies operates is serving the company well, particularly during the Covid-19 pandemic when most passenger aircraft

have been grounded but the demand for air freight has grown heavily.

Wyley adds: "We have been increasingly focused on growing our cargo business worldwide through different avenues such as acquisition, organic growth and partnerships, so this achievement was a major milestone for us.

"Our cargo team has not only expanded the cargo network, but has grown key relationships and secured contract wins with the likes of Qatar Airways Cargo in the UK, the US, Australia and New Zealand, and United Airlines Cargo in Sydney and

Melbourne while facing the unpredictability and challenges of the past 15 months.

“This milestone has highlighted the success of our strategy for cargo growth and only reaffirms its presence as part of our core long-term strategy.”

Wyley adds Menzies is also deliberately targeting emerging markets like Iraq, where operations began in April following the launch of its joint venture MASIL with Iraqi Airways, and Pakistan as it allows them to bring in best practices from around the world to the benefit of the new customer.

It also allows Menzies to develop existing relationships with cargo carriers by working together in the developing markets Wyley says, citing the example of the work being undertaken together with Qatar Airways Cargo in the new Pakistan venture, where Menzies acquired a 51 per cent stake in aviation services business Royal Airport Services.



Charles Wyley

He adds emerging markets are very much on the map for further stations, thanks to the growth rates and higher yield returns they offer.

“The potential for further growth in some of these markets based on all the analysis available to us and despite the impact of Covid-19, is high,” Wyley says.

“The Middle East, the Far East, Indonesia and Latin America have all featured in



MASIL was formed following a joint venture with Iraqi Airways

our recent business development efforts and will only become more important pieces of our global portfolio.”

And he admits that working in such markets can also provide unique challenges beyond simply understanding the governmental, political and regulatory frameworks.

For instance much of Iraq is still suffering from the ongoing impact of the US invasion and occupation of the country.

However, Wyley says none of the ongoing issues are particularly prevalent at Baghdad International Airport where Menzies has its new operations.

“This is one of the securest places within Iraq,” he says. “So you know, we brief our teams, we provide them support and also we expect the government of the country to be able to secure the airport zone to allow it to have continuous operations.”

However, he is quick to add the new business will not be at the expense of Menzies’ current operations, which are also being targeted for growth too.

Wyley says: “We still see the potential for targeted growth in our existing markets, particularly in cargo and fuels.

“For example winning the Avianca Cargo contract in Miami as the gateway to Latin America, or seeking out

opportunities in Oceania to enter the fuels market there alongside our well-established and successful cargo and ground handling businesses.”

Wyley adds the emerging-market growth strategy was also in place long before Covid-19 struck, although he admits the success of the plan is expected to be reinforced by the pandemic.

He says: “The recovery rate is forecast to be considerably stronger and there is potential for Menzies to enhance standards and processes for customers. Expanding our network into these markets with strong growth dynamics will be a key part of our growth, utilising all of our product categories.

“Within the ground handling market, we will target high volume, high value contracts in key locations making better use of resources and enabling increased customer service and engagement. Where market dynamics are favourable, we will also seek to selectively expand our ancillary product portfolio.”

Of course, with vaccination programmes rolling out across the world we can all be grateful that the world is emerging from Covid-19. In which case, it will be interesting to see if Menzies’ focus on emerging markets for cargo and other services pays off as well as hoped.



Fishing for new revenue streams

Dnata has been strengthening ties with partners and signing new deals as it seeks to grow not just its revenues but also its sustainability

Dnata has been growing connections and strengthening operations in Singapore with a number of its partners.

The Dubai-based ground handler is capitalising on long-term relations with partners from the city-state and has most recently expanded its partnership with Singapore Airlines.

At the end of May, the two parties signed a new agreement which will help the airline grow its presence in the UAE.

This will be done via dnata Representation Services which will provide marketing, sales and operational assistance for the airline as it seeks to enhance its market presence in the Emirates, including Ras al-Khaimah, Sharjah, Ajman, Fujairah and Umm al-Quwain.

The new arrangement will further strengthen relationships between the two companies as dnata already provides ramp and cargo handling services at Dubai International Airport

for Singapore Airlines. The airline also resumed services to Dubai in January after they were suspended in the wake of the Covid-19 pandemic.

Rashid Al Awadhi, vice president, dnata Travel Group - regional, says: "We are proud to be the representation services partner of choice for Singapore Airlines in the UAE.

"The expansion of our partnership is a testament to our excellent cooperation and outstanding results in Dubai over

the past four decades. Our experienced team will work hard to ensure that Singapore Airlines achieves its business objectives and delivers on its growth plans in the country.”

The new arrangement is just one example of how dnata is working more closely with companies based in Singapore after it signed a memorandum of understanding with aquaculture consultant Blue Aqua.

Following the deal, the company will upcycle leftover organic waste from dnata’s catering and ground handling operation by feeding it to insects, which are then turned into fish food.

The benefits of the process include greater sustainability through the lower use of land, water and carbon while also giving Singapore’s fish farmers a domestic source of high-quality feed.

Adding Blue Aqua to dnata’s list of suppliers of locally farmed seafood for its catering operations further completes the virtuous circle.

Dnata regional CEO for Asia Pacific Dirk Goovaerts says: “We are delighted to partner with Blue Aqua to further decrease food waste and support the local food production supply chain.

“This initiative will help us minimise our environmental footprint whilst delivering the highest value for our customers and the communities around us.”

The deal comes following recognition from IATA over the quality of service dnata offers when it comes to the temperature-controlled handling of perishable products, including fresh fruits, meat, fish, dairy and flowers at Singapore Changi Airport.

The ground handler has been awarded IATA’s Centre of Excellence for Perishable Logistics (‘CEIV Fresh’) certification having met the exacting requirements based on the IATA Perishable Cargo Regulations (PCR), which combines professional regulatory and operational input from industry and government experts.



dnata is making its food chain more sustainable

Dnata operates a modern, 1,400 metres squared pharma and perishable handling centre at Changi, which is capable of processing 75,000 tonnes of temperature-sensitive goods annually.

Sam Gould, dnata Singapore’s head of cargo, says: “There is an increasing demand for safe air transportation of temperature-sensitive goods.

“We constantly invest in infrastructure, training and process improvement to ensure that these delicate products reach the end-customer in perfect condition.

“IATA’s CEIV Fresh certification demonstrates the quality and reliability of our services, and supports Changi Airport’s positioning as the preferred cargo hub for time and temperature-sensitive shipments.”

Meanwhile closer to home, dnata is planning on giving improved line maintenance to its airline partners in Dubai following a deal with Global Jet Technic (GJT) which was also signed in May.

The new partnership will make the aircraft maintenance organisation’s services available to dnata customers at Dubai International Airport and Sharjah International Airport, as well as Dubai World Central Airport once operations launch there in the near future.

Dnata already provides ground handling and cargo services at Dubai International and Dubai World and, in the past 12 months, handled more than 77,000 flights and moved 570,000 tonnes of cargo in the country.

Dnata executive vice president Steve Allen says: “We are delighted to join forces with a reputable partner to expand our portfolio and provide a broader range of services to our airline customers in Dubai.

“Dnata and GJT share a passion for service excellence, safety and innovation. Our expert teams will ensure smooth delivery of tailor-made, quality line maintenance services across all aircraft types. We look forward to a long-standing, successful partnership with GJT.”

GJT chairman Captain Khamis Al Kaabi adds: “We value this partnership with dnata, a world-renowned air services provider, very highly and together we are very confident of making a great impact in line maintenance services delivery to the esteemed customers operating to these airports.

“This strategic partnership will play a key role in tapping into potential business at Dubai International and Dubai World Central airports.”

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Worldwide Flight Services signs 12 US deals

The ground handler believes the new deals show a recovery is on the way in the American market

Worldwide Flight Services (WFS) is reporting a pickup in the US market having signed 12 deals with airlines across the country.

Each of the contracts, which have been awarded since spring, are for a three-year period and will mean the company is handling an additional 14,000 aircraft turns a year.

The deals include handling Emirates' 250 flights a year from Dallas/Fort Worth International Airport to Dubai and Qatar Airways' 520 annual flights from the same airport to Doha.

VivaAerobus has also signed up WFS at Dallas Fort Worth for full handling

operations as the airline has a fivefold increase in flight turns at the facility.

Elsewhere, WFS has new deals with Frontier Airlines, JetBlue and new Houston-based LCC Avelo Airlines.

Southwest Airlines, Sun Country Airlines and Air France-KLM have all signed up for additional services with the ground handler while Air France and KLM have each also signed separate new deals at Denver and Los Angeles respectively.

New Italian airline Neos and Volaris are the last two airlines to sign up for WFS services in the US.

WFS executive vice president Mike Simpson says: "I want to congratulate our senior vice president ground, Terry Trainor, and our entire ground handling team in North America for helping us gain these new contracts.

"Clearly, the airline industry and its suppliers have all suffered severe disruption over the past year, but these significant contract awards show positive signs of recovery, and we are ready to provide these airlines and their passengers with the highest standards of service, safety and security at each of these locations across our network.

"During the spring break in March, we handled more than 12,000 flights – almost on a par with the pre-Covid-19 level. We are optimistic for a sustained recovery of the US aviation industry."

The latest contracts now mean WFS' North American ground handling network includes 45 airports and serves about 140,000 flights a year for more than 40 airlines.

WFS also has cause for celebration at Hartsfield-Jackson Atlanta International Airport where it has won the tender for a 20-year lease to operate the new 100,000 square feet Cargo Building C, the first new cargo terminal at the airport in 30 years.

Simpson adds: "Atlanta is a major cargo hub in North America and, through this long-term commitment and investment, WFS is demonstrating its ability to offer airlines using this great airport the



WFS will operate Hartsfield-Jackson's newest cargo terminal

highest international standards of safety, security and service."

The new building provides full cargo and freighter handling capabilities and has 11 dock doors, drive-up ramp access and a container bypass system, while services are also available for temperature-sensitive shipments.

Nor is the US the only place WFS has been expanding services, as the ground handler has also grown its relationship with Singapore Airlines having been awarded a new contract in April to take care of its Brussels operations.

The new three-year arrangement will see the company support Singapore Airlines' five Boeing 747 cargo flights a week and comes following its decision to invest in a new 250,000 tonne

capacity freight facility less than two years after opening its 9,000 square metre terminal in Brucargo West.

The new, additional terminal is designed to support WFS' customers' premium products and uses new technologies to improve operational efficiency and customer experience. It also has a dedicated pharma zone.

WFS group chief commercial officer Barry Nassberg says: "This is a significant strengthening of our relationship with Singapore Airlines and represents big gains for our operations in Belgium, France and the UK because of the airline's size and importance in the market.

"We understand this responsibility and greatly value Singapore Airlines' confidence in WFS."



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