



ANNUAL REPORT 2016

the voice of the world's airports

Airports Council International (ACI) advances the collective interests of, and acts as the voice of, the world's airports and the communities they serve. ACI promotes professional excellence in airport management and operations and, as of January 2017, accounts for 623 members operating 1,940 airports in 176 countries.

Table of contents

Message from the Chair	04
Message from the Director General	06
ACI World Governing Board	10
State of the airport industry	16
ACI at the 39th triennial ICAO Assembly	22
Putting airport safety and technical advocacy into effect	24
Airport security: Striving for innovation, excellence and efficiency	30
The community of airports at work	36
Toward improved and simplified airport operations	40
Taking ACI's Environmental Protection initiatives to the next level	44
Improving the passenger experience	48
Expanding services to our members and building knowledge	52
Promoting airport excellence one student at a time	56
The voice of the world's airports heard loud and clear	60
ACI Africa	66
ACI Asia-Pacific	74
ACI EUROPE	84
ACI Latin America-Caribbean	94
ACI North America	98
ACI World senior staff	104
ACI worldwide offices	105

Message from the Chair

My first year as ACI's Chair coincided with the 25th Anniversary of the organization. A quarter century of serving airports has proven to be a hefty task and our success as the voice of the world's airports can be attributed to the hard work of ACI's staff at World and Regional levels and to the collaboration of the worldwide community of airports.

Much like an airport community, the organization is a living body made from interdependent elements, that to function successfully and sustainably must work together. ACI is organized, structured and governed in a federal manner to encourage cooperation and the optimization of resources. The ACI World Governing Board is made up of 29 members appointed by the Regional Boards, plus the Immediate Past Chair.

ACI World and Regional committees consist of airport and industry members with expertise across a wide range of aviation specific topics. They both respond to, and advise on, the priorities for the organization based on



Declan Collier, Chair, ACI World

what our members need now, and what they will need to succeed in the future given the challenges before them. The work that takes place at these committees translates into ACI best practices and becomes ACI's official position on industry matters, ranging from economics to operations.

The organization's role as the voice of the world's airports is manifested in yearly by-airport-for airports events, training initiatives, the Airport Excellence (APEX) programme, a suite of best-practice and statistical publications, the Airport Service Quality (ASQ) programme and working closely with the International Civil Aviation Organization to represent members at the policy development stage.

Simply put, ACI is its members. Each corner of the globe is represented to ensure that no voice goes unheard. It is because of this collaboration toward the industry's sustainable future that ACI is stronger each year.

I would like to express my gratitude to Angela Gittens, Director General, ACI World and her talented staff; Fredrick Piccolo, the Immediate Past Chair; the ACI Regions; the ACI World Governing Board; and all of our members for their dedication to the industry. It is with great pleasure that I look forward to my second year as Chair.



Declan Collier

Chair

ACI World

Message from the Director General

Looking back, moving forward: 2016 in review

Dear Colleagues,

2016 was an active and successful year for Airports Council International (ACI) in providing service to our members. We were proud to celebrate the organization's 25th Anniversary and have been engaged in delivering high quality services to our members, strengthening partnerships with industry stakeholders and representing airport interests.

In our first quarter we kicked-off the fifth year of the [ACI Airport Excellence \(APEX\)](#) in Safety programme with the first review of 2016 in Tunis, Tunisia. APEX in Safety is firmly established in the industry as a valuable tool for airport continuous improvement in safety. In view of that success, in February, ACI and the International Civil Aviation Organization (ICAO) announced their enhanced cooperation on airport security with the pilot phase of the [ACI APEX in Security programme](#). Later in March, ACI launched the APEX Safety Assessor Training programme for the Africa region, attracting further



Angela Gittens, Director General, ACI World

collaborations with the World Bank, the European Aviation Safety Agency and the African Development Bank.

We witnessed the celebration of another anniversary—the tenth birthday of the [Airport Service Quality](#)

programme (ASQ), the world's leading airport customer service measurement and benchmarking tool. Given the growth of the programme which stretches across some 80 countries and 40 languages, the annual [ASQ Awards](#) event, held in Gold Coast, Australia this year, was larger than ever. In recognition of the ever increasing level of high quality customer service among airports, the Award programme was expanded to include a new category (Best Airport by Size and Region) and an acknowledgement of statistically tied scores.

The increased focus and performance on the quality of the customer experience is reflective of a larger progression of airports becoming businesses in their own right that compete for air service and connectivity for their communities. Fittingly, we ended the first quarter with the release of the [2015 ACI Airport Economics Report](#) and the [2015 ACI Key Performance Indicators](#), two key publications providing unique industry data. Along with the wealth of information and insights at the 8th Annual ACI Airport Economics and

Finance Conference and Exhibition, we assure that our members are well equipped able to make intelligent, evidence-based decisions for their businesses.

By the second quarter of the year, the [ACI Global Training](#) programme was already on track to deliver a record number of high-quality courses in the subject matter areas most valuable to our membership. Dublin International Aviation Training Academy became the first [ACI Accredited Training Institute](#) and new partnerships were forged, including one with L'École Nationale de l'Aviation Civile to offer an Advanced Master's Degree in Airport Management and another with Green Light Limited to offer a new course on behavioural analysis for passenger screening and insider threat management.

Indeed security proved to be one of the major challenges in aviation over the course of 2016 with attacks taking place both on the ground and in the air. To address terrorism at airports, ACI strongly advocated for [common-sense approach to landside security](#), garnering

support within the industry and at ICAO. As well, to help members protect themselves against the growing, pervasive threat to cybersecurity, ACI launched the [IT Security Benchmarking tool](#).

The ACI-North America/World Annual General Assembly, Conference and Exhibition held at the end of the third quarter was a rousing success with an attendance of over 2,300 delegates from 60 countries, and 263 exhibitor booths. In addition to top quality conference programming and enjoyable networking and social events, we celebrated the 2016 [Airport Management Accreditation Programme](#) (AMPAP) graduates; milestone achievement in the [Airport Carbon Accreditation](#) programme, now in its seventh year; and, the release of the [ACI World Airport Traffic Forecasts](#) which followed the [ACI Annual World Airport Traffic Report](#) issued earlier in September.

Montreal truly became the center of civil aviation in late third quarter/early

fourth quarter with the scheduling of the 39th triennial ICAO Assembly. ACI and members were highly active in forwarding the interests of the airport sector and in collaborating with other segments of the industry on a series of proposals, including a change in aerodrome design standards that will save airports significant capital investment over time and extend the life of their infrastructure, and agreement on a global market-based measure for purpose of meeting aircraft carbon emissions targets. For the airport sector, ACI and ICAO agreed a Memorandum of Understanding for enhanced cooperation on environmental initiatives, allowing more sharing of information and projects to further airport progress on reducing adverse environmental impacts.

It was also a busy third quarter for social responsibility as ACI members made a commitment to join the fight against [human trafficking \(Resolution 2\)](#) and to stop the [transportation of illegal wildlife products \(Resolution 3\)](#).

And finally, ACI closed the last quarter of the year with ACI's second [Investing in Airports conference](#), where we brought together airports, investors and policy-makers to review the range of ownership structures and regulatory frameworks with a view to formulating best practices for sustainable development to meet the air service demands of global communities, airports and airport stakeholders.

Throughout the year we cooperated and collaborated within ICAO and with other policy-makers. ACI subject-matter experts working with the membership on six [Standing Committees](#) continued to develop policy positions and technical guidance, and staff the many ICAO working groups, panels and committees that develop the international technical standards and policies with which airports must comply.

We at World and Regional level depend on our members, our Boards and our staffs to achieve the mission objectives of representing the interests of airports

and the communities they serve and promoting the excellence of airport operations and management. We are grateful to receive the engagement and expertise we need to continue to be the voice of the world's airports. We look forward to another successful year.



Angela Gittens
Director General
ACI World

2016 ACI World Governing Board Directors



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CHAIR
London City Airport, UK



BONGANI MASEKO
VICE CHAIR
**Airports Company South
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Société Aéroportuaire de
Lomé Tokoin, Togo



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Airports Company South
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2016 ACI World Governing Board Asia-Pacific



EMMANUEL MENANTEAU
Kansai Airports, Japan



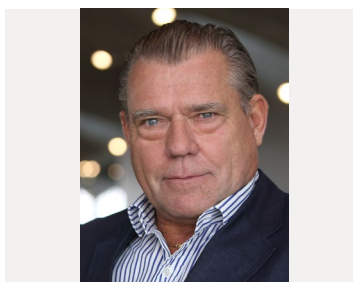
FRED LAM
Airport Authority
Hong Kong, Hong Kong



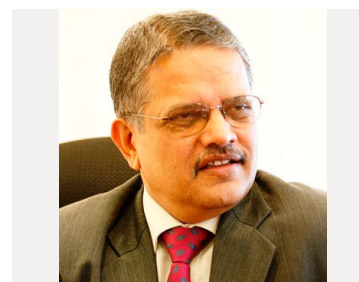
KENICHI FUKAYA
Narita International Airport
Corporation, Japan



KERRIE MATHER
Sydney Airport, Australia



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Airport International Group,
Jordan



P.S. Nair
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2015 ACI World Governing Board Europe



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Brussels Airport Company,
Belgium



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Aéroports de Paris, France



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FERNANDO BOSQUE
Grupo Aeropuerto del
Pacífico, México



**HÉCTOR NAVARRETE
MUÑOZ**
Aeropuertos del Sureste,
México



MARTIN EURNEKIAN
Aeropuertos Argentina 2000,
Argentina

2016 ACI World Governing Board North America



DEBORAH ALE FLINT
Los Angeles World Airports,
United States



HOWARD ENG
Greater Toronto Airports
Authority, Canada



MAUREEN RILEY
Salt Lake City International
Airport, United States



TOM RUTH
Edmonton Regional Airports
Authority, Canada



THELLA BOWENS
San Diego County Regional
Airport Authority,
United States



WILLIAM VANECEK
Buffalo Niagara International
Airport, United States

The state of the airport industry

Air transport through the rear-view mirror

Liberalization of the air transport industry has generated significant benefits to the traveling public with a wide-ranging choice of flights and destinations now available at competitive prices. Liberalization has also benefitted airports. Serving as gateways to centres of commerce, tourist destinations and local communities, airports along with their airline partners have welcomed higher levels of traffic. The resulting multiplier effect from liberalization on the air transport value chain and global economy is evident from increased tourism activity and cross-border investment and trade.

Despite the widespread gains achieved as a result of liberalization, geo-political threats and economic risks hang over the industry. In 2016, whether it was Brexit, the American presidential election or the Syrian Civil War, the spectre of economic uncertainty has permeated the global economy and the aviation sector in particular. In

terms of security, the industry has experienced direct terrorist attacks including those at Istanbul Atatürk and Brussels airports. Yet the industry is characterized by its ability to adapt and bounce back from adversity irrespective of the event or circumstance. This best describes air transport demand in 2016.

Looking beyond the horizon

Air transport is expected to double to over 14 billion by 2029 based on ACI's forecast annualized growth rate of 4.9%. Erring on the side of cautious optimism, there are several impediments that could potentially encumber growth prospects in air transport demand over the short- and medium-terms. Specifically, these relate to political unrest and ongoing threats to security; and, protectionist policies that retreat from further economic integration and air transport liberalization.

Finally, with ACI's global medium-term passenger forecast showing 33% growth from 2015 to 2020, many

national governments face a surge in air transport demand which is outstripping available airport infrastructure.

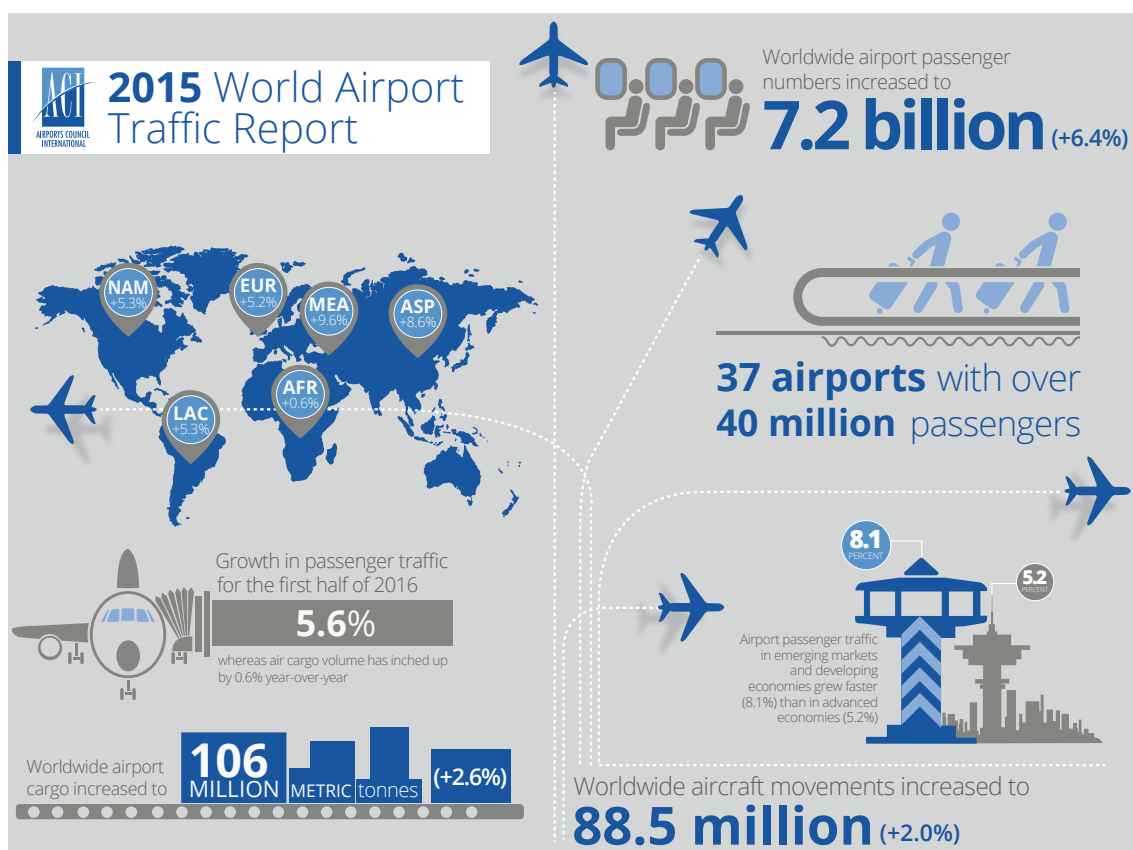
Investment is needed to address this challenge over the long-term, and many governments have tapped the private sector for the necessary resources. Along with consistency in regulatory frameworks on the pricing of airport services, a move toward well-crafted economic incentives enables private equity to flow to the airport industry. This approach attracts investment and helps manage the overall level of risk of such a long-term, capital intensive outlay.

Similarly, a key area that ACI will continue to address is in the optimum management of scarce capacity at airports. In particular, a move toward enhanced efficiency in the allocation of slots represents a key priority for the industry. ACI will continue to advocate that airport operators should be more involved in the process of modernizing the Worldwide Slot Guidelines. A recent milestone was achieved at the 39th triennial International Civil Aviation Organization (ICAO) Assembly where

both ACI and the International Air Transport Association formally agreed to work collaboratively with States in the development of more efficient and effective slot allocation processes, especially at capacity constrained airports.

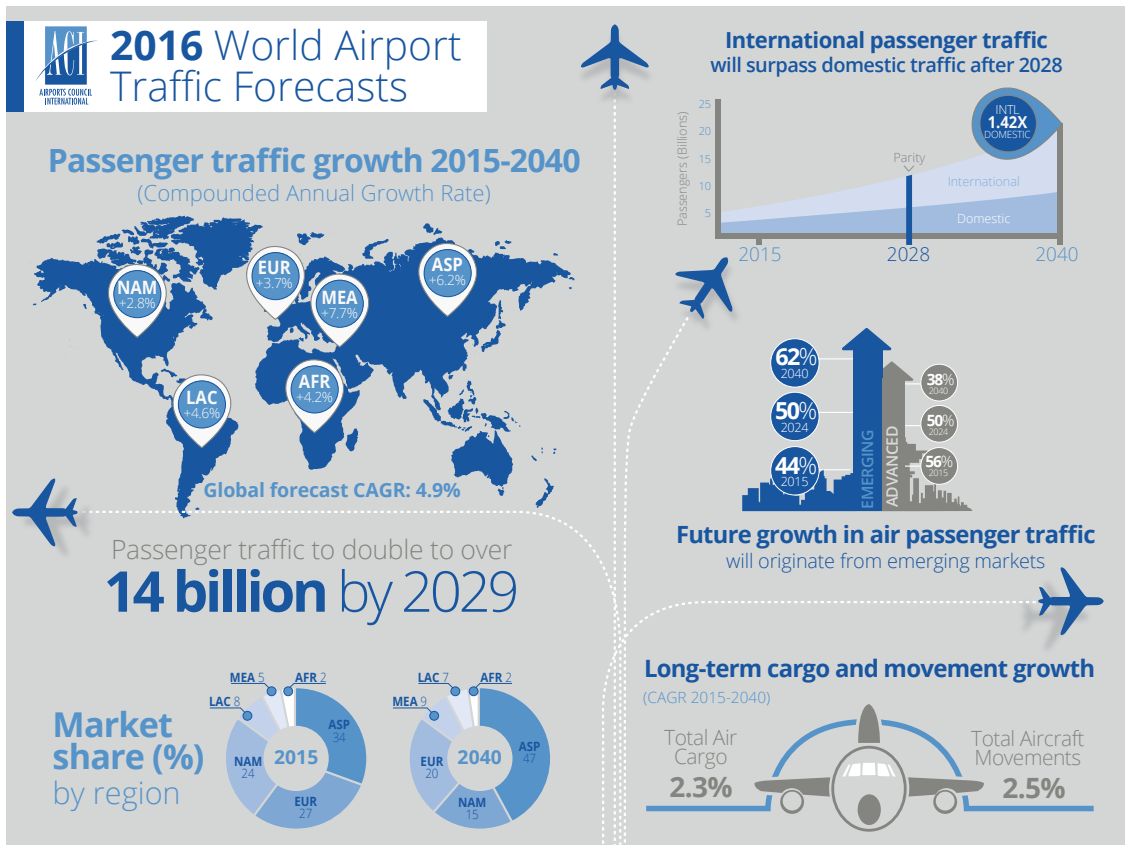
Keeping our finger on the pulse of the industry

Thanks to the engagement of members, ACI's Economics and Statistics Department is the world leader in the collection, analysis and dissemination of information on the airport industry. With a vast battery of indicators and data on the economic and financial aspects of the industry, one of the department's key missions is to facilitate evidence-based policymaking across the aviation industry and beyond. Our continuously expanding portfolio of statistics and industry analyses are relied upon by ACI Regional Offices, partner organizations, ACI Members and many other industry stakeholders.



ACI's airport traffic statistics and indicators are used to create insightful industry analyses and reports on air transport demand, and are also available as unrivaled datasets for public purchase. In September 2016, the latest version of ACI's flagship publication, the *ACI Annual World Airport Traffic Report*, was released with comprehensive data coverage from over 2,300 airports throughout the world. The publication remains the authoritative source and industry reference for data, analyses of trends, indicators and rankings on airport traffic.

The *ACI World Airport Traffic Forecasts (WATF)* was also released at the ACI-North America/World Annual Assembly, Conference and Exhibition held in Montreal, Canada, in September 2016. Forecasts are a crucial ingredient in airport planning to determine future capacity requirements. Since infrastructure projects are costly and involve many resources, a data-driven understanding of future demand, such as the expected number of aircraft movements, passenger traffic throughput and air cargo volumes, give airport planners and investors



the necessary lens for effective decision-making.

The *ACI Airport Economics Report* provides an invaluable measure of the airport industry's financial and economic performance based on an annual data survey of the world's airports. Its companion, the *ACI Airport Key Performance Indicators*, which was released at the ACI 8th Annual Airport Economics and Finance Conference and Exhibition held in London, United Kingdom, in March 2016, provides insight into areas ranging from

financial and employee performance to fixed-asset productivity and airport operations. The complete package of indicators presents quantifiable barometers of industry activity for airport managers, analysts, investors and other aviation stakeholders.

We also developed two Policy Briefs that analyze airport ownership, regulation and financial performance, as well as the economics and business dynamics of airport networks at a global level. They are expected to be published in 2017.



Policy Brief

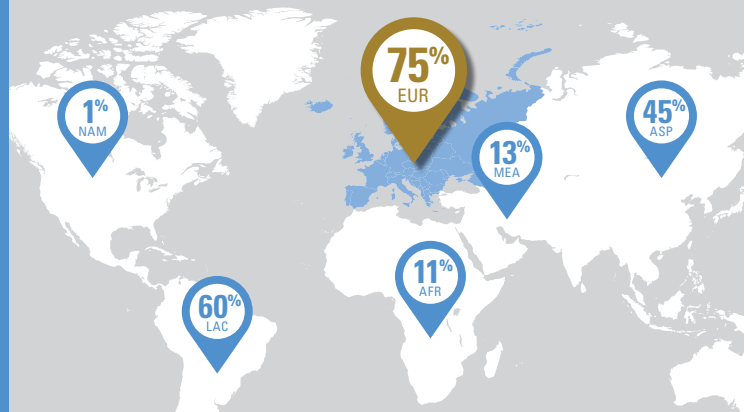
Airport ownership, economic regulation and financial performance

41% PAX TRAFFIC AT PRIVATE AIRPORTS

59% PAX TRAFFIC AT PUBLIC AIRPORTS



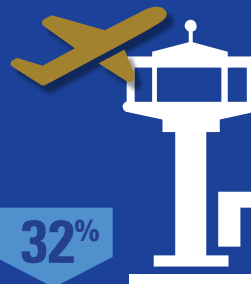
Proportion of pax traffic handled by airports with private sector participation by region



Of the world's 100 busiest airports for pax,

46

have some form of private sector participation.



68% PAX TRAFFIC HANDLED UNDER DUAL/HYBRID TILL (FOR MAJOR PRIVATIZED AIRPORTS)

32%

SINGLE TILL

DUAL TILL

HYBRID TILL

DUAL AND HYBRID TILL REGIMES INCENTIVIZE PRIVATE INVESTMENT AT AIRPORTS.

2016 | 01



World Economics Standing Committee meeting hosted by Munich Airport in October 2016



Airport Traffic Think Tank – Statistics and Forecasting Subcommittee meeting hosted by Brussels Airport in May 2016

Member focus: Our core value

Beyond ACI events and conferences on economic, financial and regulatory matters that bring together airport operators and experts, ACI Members are also directly engaged through the World Economics Standing Committees and the Statistics and Forecasting Sub-Committee. With periodic meetings throughout the year coupled with active exchanges among members through expert working groups and projects, these committees provided strategic guidance on future activities.

Looking ahead

Bringing ACI's mission to stakeholders, partners and sister organizations will continue to be at the top of our agenda. Supporting and engaging members on economic matters is a crucial component in this process. Reinforcing these initiatives with accurate and reliable data will cement ACI's credibility as a key stakeholder in the formulation of evidence-based policy making. Through upcoming Panel meetings at ICAO, industry conferences in different regions and expert symposiums, the ACI Economics and Statistics Department will continue to increase its influence by being an active player in all these forums on behalf of airport operators across the globe.

ACI at the 39th triennial ICAO Assembly

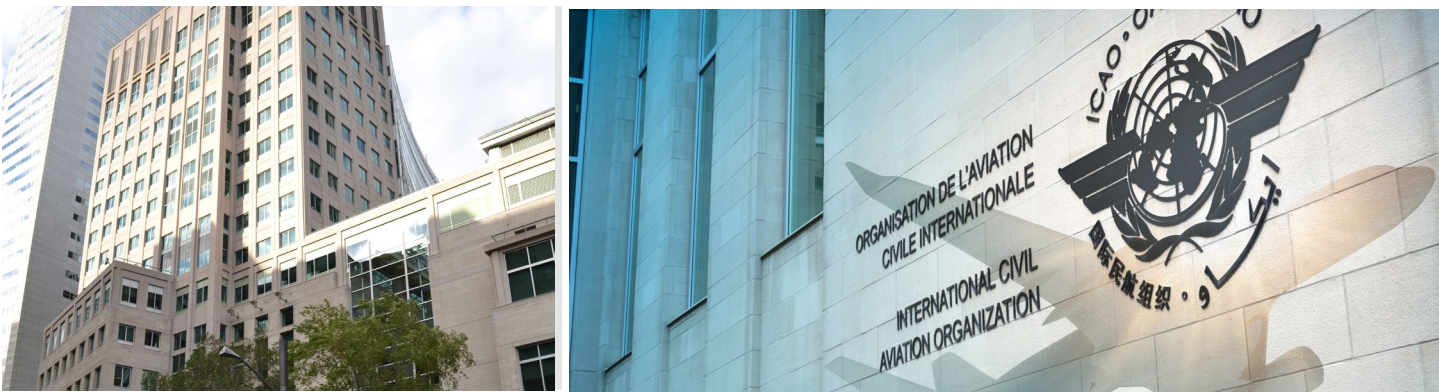
ACI has a mission to represent the interests of the world's airports. It does this through continuous engagement with decision makers in national authorities, international government organizations and other industry representative bodies. Most of this engagement is in bilateral meetings or through specialized groups.

However, every three years the International Civil Aviation Organization (ICAO) brings together over 2,000 delegates from up to 191 countries and international observer organizations to review the work of the past triennium and to set the policy agenda for the next. In 2016 the 39th triennial ICAO Assembly was held at its headquarters in Montreal, Canada, from 27 September to 6 October. It elected a new 36 member Council, the permanent governing body of ICAO and agreed its budget of around CAD\$100 million for each of the coming three years.

This was an important period for engagement with ICAO as ACI worked

directly with the ICAO Secretariat and the national regulators attending the Assembly to promote airports' interests. In consultation with the ACI World Standing Committees, and under the approval of the World Governing Board, ACI submitted papers on:

- **Landside security**, advocating a common sense approach for key strategies, including reduced crowds and queues, patrolling and intelligence sharing;
- **the need to optimize the use of scarce capacity**, particularly at capacity constrained airports. This will see ACI working more closely with other stakeholders to develop a more efficient and effective slot allocation process;
- **the review of aerodrome design specifications**, which could eventually form the basis for amendment to ICAO Annex 14, providing additional efficiency and capacity;



The 39th triennial ICAO Assembly was held in Montreal, Canada, from 27 September to 6 October 2016.

- **on unmanned aerial vehicle operations**, presented with industry partners, which will see the development of Standards to support a harmonized approach.

All of these proposals were widely supported and adopted by the Assembly. ACI also worked closely with industry colleagues through the Air Transport Action Group (ATAG) to promote a single global market based measure to account for aviation's growth from 2020. This would be fully consistent with ACI's [Airport Carbon Accreditation](#) programme that is widely used in all parts of the world. The Assembly agreed to adopt a broad basket of measures to address aviation's contribution to climate change and ACI will support its implementation

in the coming years. ACI also welcomed ICAO's increasing interest in promoting the sustainable development of aviation and green airports as outlined in the ATAG Aviation Benefits Beyond Borders initiative.

The coming year is expected to see continued engagement in the many study groups, committees and panels that prepare the technical work before the outcomes are presented for adoption. ACI is in the unique position of being able to bring together airport practitioners from around the world, and using this knowledge-base to make credible proposals for changes to the international regulatory framework that benefit the traveling public and the communities they serve.

Putting airport safety and technical advocacy into effect

Since ACI was formed 25 years ago, it has advocated for the interests of airport operators on airfield design and operational safety issues; and, for the last five years has strongly promoted [Airport Excellence APEX in Safety programme](#). The year 2016 was one of consolidating engagement with the International Civil Aviation Organization (ICAO) on safety and technical affairs, including working directly with the Air Navigation Commission (ANC).

Engagement with ICAO

We are particularly proud of the adoption of the latest amendment to *ICAO Annex 14 Volume 1 - Aerodromes* in 2016. We have championed and followed this amendment as it has worked its way through the ICAO process, and made constructive proposals for change to meet airports' concerns in the ANC reviews.

The amendment contains revised technical standards for the design of

aerodromes according to aerodrome reference codes that included reduced separations between parallel taxiways and with objects—effective in November 2016. ACI presented evidence supporting the reduction of taxiway separations, based on safety data from studies of deviations from the centre line during taxiing. These changes (up to 6.5 metres reduction) are expected to reduce the cost of new construction by hundreds of millions of dollars and give airports additional flexibility to accommodate larger aircraft on more taxi routes giving operating efficiencies.

Other changes included a timetable for the phase out of outdated and now rare Visual Approach Slope Indicator Systems in favour of Precision Approach Path Indicators, larger markings for Runway Holding Positions, provision for open drains in runway and taxiway strips and a recommended lighting pattern for Autonomous Runway Incursion Warning Systems—also known as Runway Status Lights.

The amendment also introduced a new method of assessing aircraft braking action on contaminated runways—the Global Runway Condition reporting format, which was based on the type and depth of contamination and augmented by pilot reports. Operational reporting would no longer be based on friction measurements, which can change rapidly. ACI plans to help with training and guidance material to ensure a smooth roll-out of the new method, effective in November 2020. The next phase of ACI’s work with

ICAO covering other airfield dimensions such as runway width, taxiway width and runway-taxiway separation as well as obstacle clearance began in 2016. These dimensions could also be reduced, based on safety data which organizations, regulators and manufacturers have collected, as well as the capabilities of modern aircraft. A complete proposal was approved by the ICAO Aerodrome Design and Operations Panel in late 2016, for submission to the ANC in early 2017.



ACI took part in the 64th meeting of the International Industry Working Group held in Doha, Qatar, in March 2016.



ACI accepted IATA's invitation to lead and present a session at the 29th IATA Ground Handling Conference for airlines and ground handlers, held in Toronto, Canada, in May 2016.

ACI also suggested a template for the restructuring of *Annex 14* to make its provisions for aerodrome design more comprehensible.

Considering the importance that ACI gives to assisting airport excellence, we were very willing to participate in the development of a new ICAO publication aimed at improving the safety of airport operations - *Procedures for air navigation services – Aerodromes (PANS-Aerodromes)*. Its creation was motivated by the ANC's observation that *Annex 14 Volume 1 - Aerodromes* is primarily a design document and that

States and airport operators needed guidance on how to address specific operational issues.

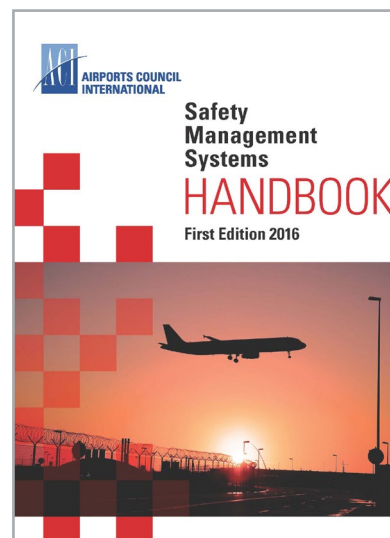
The first edition of PANS-Aerodromes was published as ICAO Doc 9981 and became applicable in November 2016. It focuses on critical areas identified during ICAO audits such as the certification of aerodromes, safety assessment and airport compatibility. The PANS-Aerodromes Sub-Group has also begun working on a second part of the document, *Part 2- Operations on the Airfield*, which will focus on operations. Eleven chapters have been

completed or are in progress and more chapters are anticipated in the future. The document is expected to be published in 2017 for applicability in 2018.

Another important area of work in 2016 was on ICAO guidance on pavement strength, including switching to a new design method for flexible pavement, based on a multi-layer elastic model—a more accurate way of modelling the behaviour of asphalt pavement. This is a major change and its adoption would necessitate training for airport design staff. ACI was able to provide evidence based advice in the revision of the *ICAO Aerodrome Design Manual part 3 – Pavements*.

ACI Safety Handbooks

ACI added the *ACI Safety Management Systems Handbook* in 2016 to its series of best practices in safety publications for airport operators. This should help many airports comply with national regulations that mandate Safety Management Systems. The other handbooks in the safety series are



the *ACI Apron Safety Handbook*; *ACI Runway Safety Handbook*; *Emergency Preparedness and Contingency Planning Handbook*; *ACI Wildlife Hazard Management Handbook*; and, *Apron Markings and Signs Handbook*.

Reviewing the reports of APEX in Safety reviews highlighted some major areas where there was a need for more guidance from ACI, and where many airports have had difficulties. Three new handbooks will be prepared to support airports in the areas of management of operations during construction work, management of rescue and firefighting services and airfield maintenance planning and asset management.

Aircraft compatibility

ACI best practice and advice have helped smooth the introduction of new aircraft types at airports and also made aerodrome certification an easier process for States and aerodrome operators. ACI has worked with regulators to produce guidance documents on how to accommodate specific types such as the Airbus A380 and the Boeing 747-8; and, is currently working on the Boeing 777X (which features folding wingtips).

The Safety Forum at the ACI-North America/World Annual General Assembly Conference and Exhibition

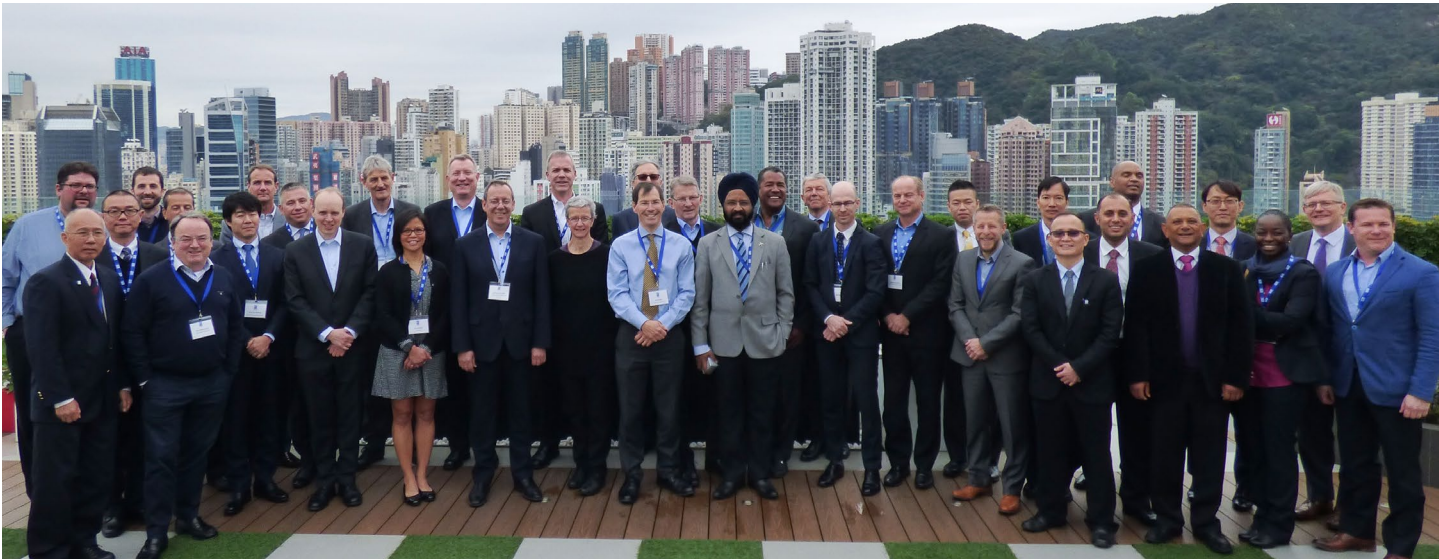
Together with ACI North America (NA), we presented a Safety Forum at the ACI-NA/World Annual Assembly, Conference and Exhibition in Montreal, Canada, where we informed participants on the range of ACI World safety initiatives and the APEX in Safety programme.

Ground handling

An ACI policy paper on ground handling activities on airports consisting of three general concepts for ground handlers—certification, licencing and oversight—was approved by the World Governing Board at its Montreal meeting and published in October. This responded to concerns about accidents on aprons related to ground handling and a lack of regulation, as well as the reality that airport operators may have difficulty imposing safety regulations on ground handlers.

The most important recommendation was that airport operators should give a licence to each ground handler that allows it to operate on the airport's property. The licence would give the airport operator more power to oversee safety standards. The committee would further develop the outline of the proposed licence into a complete template that could be adapted according to local needs.

ACI also supported the ICAO Ground Handling Task Force which is preparing an ICAO guidance manual for which



The World Safety and Technical Standing Committee at the STSC/34 Committee Meeting held in Hong Kong, in January 2016.

ACI provided material on how aerodrome operators might regulate, provide safety oversight and license ground handling service providers. Concurrently ACI began developing a strategy for cooperation with the International Air Transport Association (IATA) and has provided comments on the *IATA Ground Operations Manual*.

Committee work

None of this would be possible without the engagement of the members of the ACI World Safety and Technical Standing Committee, representing all regions of the world. We would particularly like to thank the members who help represent ACI at ICAO and IATA meetings. Without them, and their organizations' support, ACI could not represent its members' interests adequately. It is thanks to their dedication that great things happen.

Airport security: Striving for innovation, excellence and efficiency

The threat from terrorism is undoubtedly one of the biggest challenges that the aviation system faces. This was underscored in 2016 by attacks in the public areas of Brussels-National and Istanbul Atatürk airports. Not only is aviation a high profile target from an operational and economic impact perspective, it is also an attractive target due to the different stakeholders it brings together in one place, including airlines, retailers, ground handlers, security staff and of course, millions of passengers from all corners of the globe.

Maintaining the safety and [security](#) of the traveling public is the top priority for airports. Security involves multiple layers of integrated processes and technologies to detect threats and/or mitigate risks. Within the current security climate, it is more important than ever that the most appropriate measures to the risk environment are implemented, and that help and support is provided to countries or airports that need assistance to meet global standards. For airports, key

challenges are protecting the landside of airports, addressing insider risks and implementing efficient and effective processes to safely manage increasing passenger numbers with limited resources.

APEX in Security

With these goals in mind, ACI piloted the Airport Excellence (APEX) in Security in 2016, to assist airports in their efforts to improve their security measures—that is, to identify areas where efficiency and effectiveness gains can be made; to increase the level of compliance with applicable standards, recommended practices and national requirements; and, to foster the sharing of best practices in security among the airport community.

The first review was held in Plain Magnien, Mauritius, in March 2016, with further pilots in Indonesia later in the year. All of the reviews were well received by the host airports and the security partners taking part. Some



The ACI World Security Standing Committee in Tampa, Florida, in March 2016.

lessons learnt included the need for greater engagement prior to a review to understand the airport's regulatory and risk environment and some flexibility to account for different delivery models for security measures.

Smart Security

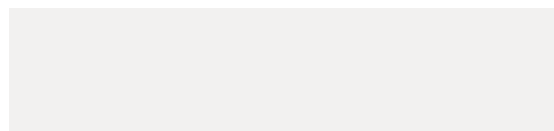
The joint International Air Transport Association(IATA)-ACI [Smart Security programme](#) provided an example of how a more sustainable, efficient and effective passenger screening process can be implemented to strengthen security, increase operational efficiency and improve the passenger experience.

2016 saw the successful deployment of Smart Security components at many airports, as well as ongoing trials of technology such as Computed Tomography for hand baggage, which enables liquids and electronic items to remain in bags,

and automated algorithms to recognize potential threat objects. The project also strengthened relationships with TSA through engagement with the Innovation Task Force, and a Memorandum of Understanding with Atlanta Hartsfield Jackson Airport that will see the exchange of information on ongoing trials and implementation.

delivered two regional workshops, one in Montreal, targeted at airports in Latin America, and one in Geneva for European airports. By moving away from individual airport assessments to a regional workshop model, the programme aimed to broaden its outreach to a greater number of airports.

2016 also saw the development of the next iteration of detailed guidance material for each of the Smart Security components. Topics included differentiation techniques and initial findings from advanced screening equipment trials. The programme also



The APEX in Security team with executives from Airports of Mauritius Co. Ltd. during the first ACI APEX in Security pilot security review held in Plain Magnien, Mauritius, in March 2016.



(From left) Nick Careen, Senior Vice President, Airports, Passenger, Cargo and Security, IATA; Roosevelt Council Jr., Deputy General Manager and Chief Financial Officer, Hartsfield-Jackson Atlanta International Airport; and, Angela Gittens, Director General, ACI World signed a Memorandum of Understanding for collaboration on Smart Security at Atlanta Airport.

Events and conferences

ACI and its members participated in many global security events to represent airports interests and promote airport excellence in security. These included jointly hosting 2016's Aviation Security (AVSEC) World Conference in Kuala Lumpur, Malaysia and engagement with the Travel and Tourism industry through participation in the Global Travel Association Coalition working groups, which include the World Tourism Organization and World Travel and Tourism Council. This culminated in the development of positions on security and facilitation to promote



Angela Gittens, Director General, ACI World at AVSEC World held in Kuala Lumpur, Malaysia, in October 2016.

best practices to support tourism, and participation in a Ministerial panel at the World Travel Market Conference in November in London, United Kingdom, in November 2016.

Engagement with ICAO

Engagement with ICAO is particularly critical in the security field, as regulation is moving rapidly due to the changing nature of threats. As such, ACI participated in the ICAO AVSEC Panel, ICAO working groups on guidance material, *Annex 17* and innovation, an ICAO Cyber Security group and the Africa Security and Facilitation Plan Steering Committee to promote improvements in security and facilitation in African States.

The 39th ICAO Assembly was also a key event, where we successfully advocated airports' positions with regard to a common sense approach to landside security and helped to develop a new resolution on cyber security.

Handbooks and guidance material

Recognizing a need for detailed guidance on many aspects around attacks in public areas of airports, the ACI World Security Standing Committee



The ACI World Security Standing Committee

created a working group to develop a handbook which will include best practices for physical measures, building and process design and crisis management. We expect to deliver the first iteration of the handbook in 2017.

Looking forward

In 2017, as we continue to face a challenging security environment, ACI will continue to work with its members, industry partners and regulators worldwide with a view toward a stronger and more efficient security system. Areas of focus will be capacity building and assistance, training, guidance material and innovation through our existing programmes and the development of new capability. We plan to fully launch APEX in Security, provide a new handbook on landside security, work with our partners such as IATA on capacity building and best practices and launch new training courses.

[The community of airports at work]

ACI's Airport Excellence (APEX) in Safety programme is an established part of ACI's mission of promoting airport excellence. The programme provides assistance for ACI Members airports around the world, and helps them improve their level of safety and compliance with the International Civil Aviation Organization (ICAO) Standards and Recommended Practices.

The core of the programme is the on-site safety review by the ACI Safety Review Team, comprised of a carefully selected team of active airport professionals. The team identifies safety gaps and develops an action/implementation plan to address these gaps, helping the host airport achieve certification if needed.

Since the programme's launch in 2011, APEX teams have reviewed more than 50 airports worldwide and have built a pool of over 130 safety assessors from over 60 different airports and international organizations. ACI is grateful for the support of the assessors from all regions and from airports ranging in size from 100,000 to over 90 million passenger a year. The APEX assessors guarantee the success of the programme by sharing their knowledge and promoting airport safety management excellence.

APEX's 50th safety review

The first review of 2016 took place at Tunis-Carthage International Airport in Tunis, Tunisia.



The first review of the year took place at Tunis-Carthage International Airport in Tunis, Tunisia, in February 2016.

APEX Safety Assessor Training programme

March 2016 also saw the launch of the APEX Safety Assessor Training programme for the African region, where participants were trained to become accredited APEX assessors. The first session, in Casablanca, Morocco, enabled the new assessors to join the APEX team on missions to selected airports. A second course in Africa is expected to take place in early 2017 and to extend to other regions throughout the year.

Strengthening new and existing partnerships

As APEX continued to grow, ACI strengthened existing partnerships and built new relationships with other likeminded organizations. For instance the World Bank, which fully financed the APEX review in Cairo, Egypt in May 2015, also sponsored the progress review of the action plan created in April 2016. This collaboration resulted in many good opportunities for our membership and we look forward to continuing this important cooperation.

A partnership agreement was also signed with the European Aviation Safety Agency (EASA) which would provide funding assistance in Central and West Africa to support airports in developing countries that would not otherwise be able to cover the costs of the reviews. In 2016, Maya-Maya Airport in Brazzaville, Congo; and Douala International Airport and Yaoundé Nsimalen International Airport in Cameroon were the first to benefit from this initiative. Airports in Libreville, Gabon, and Pointe Noire, Congo, are scheduled for 2017.

APEX in Security

ACI also held a pilot APEX in Security review in Mauritius and two in Indonesia. The Australian Office of Transport Security participated as an observer and provided positive feedback. This APEX in Security pilot demonstrated the demand for the reviews but ACI plans to conduct further pilots of airports in other parts of the world before launching the programme.



Apex in Safety review in Brazzaville, Congo



APEX in Security pilot review in Bali, Indonesia

APEX workshops

At ICAO's request, ACI participated in two Aerodrome Certification workshops in Kingston, Jamaica, and in Lima, Peru, in May and October 2016 respectively. For the first time since the creation of the programme, five airports that had previously hosted reviews requested follow-up reviews to assess the progress of their action plan.

The road ahead

APEX will continue to be first and foremost a service to ACI Members. However, in order to help all our members, ACI will also collect and use aggregated data (maintaining individual airport confidentiality) to help identify safety gaps and areas of improvement in each of the regions. ACI will be able to better identify the needs for assistance, training programmes and the ACI Safety and Technical Standing Committee as it evaluates the need for guidance.

Toward improved and simplified airport operations

ACI helps the community of airports use Information Technologies (IT) to improve operations, the effectiveness of security and other systems and processes and to increase revenues. The common objective is to facilitate all processes for airports and improve the passenger experience.

The ACI World Airport IT Standing Committee and the ACI World Airport Facilitation and Services Standing Committee drive and prioritize such projects and initiatives. Through these Committees, that include experts from member airports, ACI is able to identify, influence, adapt and develop best practice guidance material for the benefit of all of our members.

In 2016, the Committees focused on:

Beacons: ACI and the International Air Transport Association (IATA) published the Airport Terminal Beacons Recommended Practice. The document provides technical and process guidance for the deployment and use of airport terminal beacons at airports.

Cybersecurity: A cybersecurity task force was created to engage and educate airports on the issues of cybersecurity; to define a strategy to help protect airports against cyber-attack; and, in the event of such an attack, to assist in mitigation, resilience and quickly recovering.



AIRPORT IT
SECURITY BENCHMARKING TOOL
Stronger IT security for a stronger airport community



The ACI World Airport IT Standing Committee and the ACI World Airport Facilitation and Services Standing Committee in Gold Coast, Australia, in April 2016.

To support this process, ACI has deployed the [Airport IT Security Benchmarking tool](#) which provides best practices on information security management to those responsible for initiating, implementing or maintaining information security management systems.

ACRIS: The [Airport Community Recommended Information Services \(ACRIS\)](#) Subcommittee developed guidance material and technical

standards to encourage and facilitate data exchange through the web between aviation industry entities. Several initiatives based on this standard were developed and deployed, including:

- **Seamless Travel:** The digital connectivity of several apps that allow access to the functionalities (e.g., travel bookings, commercial promotions, wayfinding, etc.);

- Airport Collaborative Decision Making: A service that enhances the overall efficiency of airport operations by improving the predictability of take-off times;
- Asset Management: A monitoring system that manages assets and their associated performance, risks and expenditures over their life-cycle; and,
- Application Programming Interface (API) Shop: A combination of technology and services that promote an open data strategy to help automate and document API development.

End-to-end processes: Passengers and baggage

ACI worked with IATA and governments to simplify the way that passengers and their baggage travel from point to point. Shared information can help offer a seamless journey through all stages within the airport without requiring them to keep producing documentation such as passports, tickets or boarding passes.

Along similar lines, ACI worked on end-to-end baggage tracking processes. Airport check-in baggage systems have greatly improved over the years and the integration of various technologies can offer the possibility to track checked baggage from baggage check-in to collection at the baggage carousel.

Passenger assistance handbooks

ACI recognizes that airport passengers have all types of special needs and assistance requirements related to disabilities, age or any other special circumstances. The ACI Passenger Assistance Task Force has developed the upcoming handbook on Airports and Passengers Requiring Assistance. The

release is scheduled for 2017 and is expected to include best practices at airports around the world and examples on how new technologies can help improve the journey for passengers needing assistance.

Key performance indicators and Airport Service Level Agreements

With the increased use of technologies in airport operations, maintenance and services, a large amount of data is now available to airport operators. ACI continued to work with its members to provide guidance on ways to use such data as key performance indicators and monitor Airport Service Level Agreements between airport operators and service providers.

Collaboration and engagement

ACI's IT and Facilitation initiatives depend on engagement with the members through the Standing Committees and respective task forces and working groups. Their time is valuable and is greatly appreciated. Through constant exchanges with our members, ACI Regional offices and respective committees, ACI receives vital feedback that helps prioritize and customize initiatives accordingly. And, with ICAO and IATA, collaboration and engagement are the greatest tools to facilitate and improve the overall airport travel journey.

Taking ACI's Environmental Protection initiatives to the next level

Responsible environmental stewardship has been one of ACI's cornerstones since it was established in 1991 and our efforts continued to evolve to support airports as they operate in ever more environmentally sustainable ways.

ACI and the Committee on Aviation Environmental Protection

As an accredited Observer, ACI promotes the interests of airports and the communities they serve at the International Civil Aviation Organization's (ICAO) Committee on Aviation Environmental Protection (CAEP). In 2016 ACI supported the development of two new standards for international aviation emissions: the first for carbon dioxide emissions from aircraft; and the second for non-volatile particulate matter, which is related to local air quality at and around airports. These standards were both adopted by CAEP in February 2016.

Reducing carbon emissions

ACI is proud to report that the *Airport Carbon Accreditation* programme, which completed its seventh year, now includes 180 accredited airports in more than 50 countries around the world. Under the programme, more than 200,000 tonnes of CO₂ were reduced in the year ending June 2016, enough to power over 86,000 households. Initiated by ACI-Europe, *Airport Carbon Accreditation* is in every Region of the world.

In September, version 4.0 of the *Airport Carbon Emissions Reporting Tool (ACERT)* was launched at the ACI-North America/World Annual General Assembly, Conference and Exhibition. The tool helps airports progress rapidly toward *Airport Carbon Accreditation*. One of the additional features of the new version is the development of specific data that can be used on the *Airport Carbon Accreditation Online Application*. As well, an ACERT tutorial was developed.



ICAO's Committee on Aviation Environmental Protection

In October, ACERT training sessions were given at [ACI Developing Nations Assistance Programme](#) courses on Environment, one held in Maputo, Mozambique, and the other at the 3rd ICAO Capacity Building Seminar in Libreville, Gabon.

Carbon Offsetting and Reductions Scheme for International Aviation

ACI, with other aviation industry stakeholders working through the Air Transport Action Group (ATAG),



ACI DNA Environment course held in Maputo, Mozambique, in October 2016



ACI World Director General Angela Gittens (right) and ICAO Secretary General Dr. Fang Liu (left) signed a new MoU to enhance cooperation on environmental related initiatives.

supported the implementation of a global market-based measure for international aviation at the 39th triennial ICAO Assembly. The ACI World General Assembly had approved a [Resolution](#) in support of Carbon Offsetting and Reduction Scheme for International Aviation instructing the ACI Delegation to formally express its agreement. The historic ICAO outcome was reached on 6 October 2016.

Also during the ICAO Assembly, the Director General of ACI and the Secretary General of ICAO signed a Memorandum of Understanding (MoU)

for providing a framework for [enhanced cooperation on environmental related initiatives](#). The MoU will see ACI and ICAO working closely to implement new and improved programmes for greener airports worldwide with more information exchange; guidance on airport best practices; joint environmental workshops and training; and collaboration for the development of an ACI Airport Excellence (APEX) in Environment programme figuring prominently in the intended outcomes.

United against wildlife trafficking

2016 also brought [wildlife trafficking](#) into the ambit of our sustainability interests. In March, ACI signed the [United for Wildlife Transportation Taskforce Buckingham Palace Declaration](#), joining transportation and other stakeholders in the fight against wildlife trafficking. The support from ACI Members was reinforced at the General Assembly, where a [Resolution](#) expressing support of the “United for Wildlife Transport Task Force” was unanimously adopted. By the end of



The Duke of Cambridge (front row, centre right) and Lord Hague (front row, centre left), along with over 30 signatories (Angela Gittens, Director General, ACI World, is pictured back row, eighth from left), signed the United for Wildlife Transport Taskforce Declaration at Buckingham Palace in March 2016.

the year, ACI also joined the Reducing Opportunities for Unlawful Transportation of Endangered Species (ROUTES) partnership which will support ACI in fulfilling its commitments under the aforementioned Buckingham Palace Declaration and Resolution.

Looking forward

ACI looks forward to continuing to face the industry's environmental challenges head on and collaboratively, toward an environmentally sustainable future.

Improving the passenger experience

The [Airport Service Quality \(ASQ\) programme](#) is the world's leading airport customer service measurement and benchmarking tool and the only programme measuring passengers' experience while they are traveling through the airport. The programme also identifies and disseminates best practice methodology from the top-performing airports around the world and provides input to airports in all regions that seek more effective and profitable ways of serving the flying public.

ASQ is thus a widespread community of airports sharing the same interest in improving the passenger experience and sharing best practices on a continual basis.

ASQ mechanics and benefits

The ASQ survey provides airports with research and management tools to better understand passengers' perception of airport services.

Once this research is broken down, the findings help airports optimize investments and initiatives, monitor performance of suppliers and negotiate service level agreements. ASQ findings are also used to guide management and staff and to enhance the customer experience. Furthermore, ASQ is increasingly used by regulators as an objective method of measuring customer satisfaction at airports of different sizes and capabilities.

In addition to the benchmark programme and the long list of standard reporting deliverables, ACI also offers a suite of optional add-on products and services for participating airports including executive presentations; a Comprehensive Insight Report; and, access to on-going ACI research.

For airports wishing more individualized guidance, ACI offers help at different levels in enhancing the customer experience; performing customer experience management diagnoses; and, providing recommendations and action plans.



ASQ reaches out to various stakeholders that influence the decision-making processes at airports.

ASQ's 10th Anniversary

In 2016, ASQ celebrated its 10th Anniversary. As we blew out our birthday candles, we featured monthly articles from ASQ Member airports. Through firsthand interviews published in the [ACI World Report](#), we highlighted what ASQ means to each airport, and how the programme has contributed to customer service excellence and satisfaction among travelers.

In terms of numbers, ASQ reached new heights; at the close of the year 318 airports were registered in one of our three ASQ survey programmes, and ASQ research was present in

84 countries and in 41 languages—representing more than half of the world's 7.2 billion annual passengers.

ASQ Events

The world's top-performing airports in the realm of customer service met in April for the [ASQ Awards Ceremony](#), held in Gold Coast, Australia, during the ACI Asia-Pacific Regional Assembly, Conference and Exhibition. Given the growth of the ASQ programme, the 2015 results were expanded to include a new category, "Best Airport by Size," and an acknowledgement of statistically tied scores.

More events were held. ASQ hosted three [Forums](#) organized around the theme “The people behind the numbers.” The purpose of each Forum was to help airports get the best from the ASQ survey and results to effectively manage passenger satisfaction, improve the quality of their airport services and exchange examples of best practice in airport customer experience. The first Forum took place in Brisbane, Australia in April, and the second and third took place in Guayaquil, Ecuador, and Naples, Italy, in November.

New guidance material

In 2016, ACI published two leading publications:

- *Does passenger satisfaction increase airport non-aeronautical revenue? A comprehensive assessment research report*: A research paper that helps airports in their efforts to analyze, target and raise non-aeronautical revenue through customer service; and,



Airports celebrated their commitment to customer service at the ASQ Awards Ceremony, held in Gold Coast, Australia, in April 2016.



ASQ Forum participants in Naples, Italy, in November 2016.

- *ACI Passenger Personas*: A publication aimed to support airports in developing a deeper understanding of the needs of the traveler.

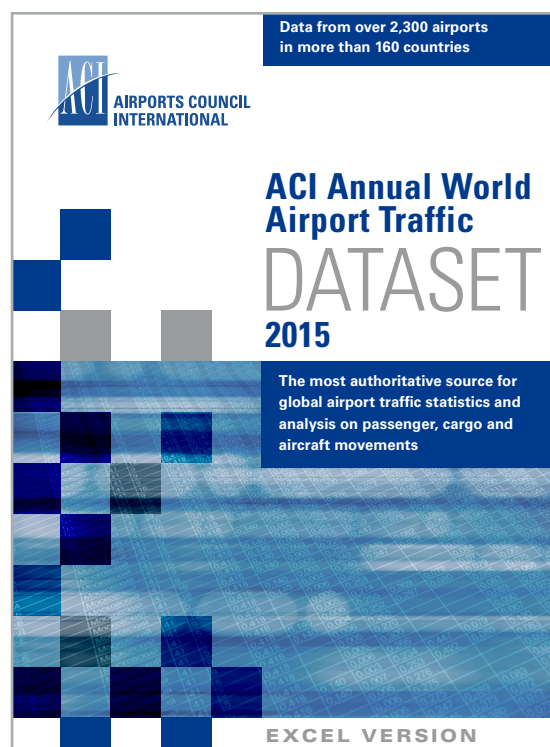
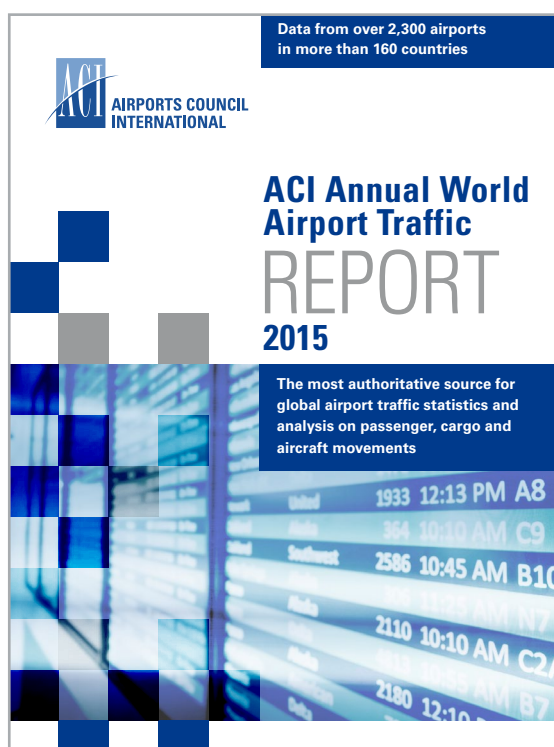
that all ASQ rules and criteria during the data collection process have been implemented. We concluded 2016 with more than 130 remote and seven on-site airport audits.

Improving ASQ's quality control process

ACI continued to work with its service provider TNS Canada and its ASQ Subcommittee participants to improve the overall programme. This fruitful collaboration brought improvements to the reporting tools and quality control process. The latter integrates increased number of tools to verify

Together with our members, ASQ helped shape a deeper understanding of what drives passenger satisfaction worldwide. While the core programme remained relatively unchanged, the tools available to help airports analyze their data greatly improved. With these enhanced tools came the opportunity to draw more profound conclusions to inform strategic decisions and ultimately lead to a better customer experience.

Expanding services to our members and building knowledge



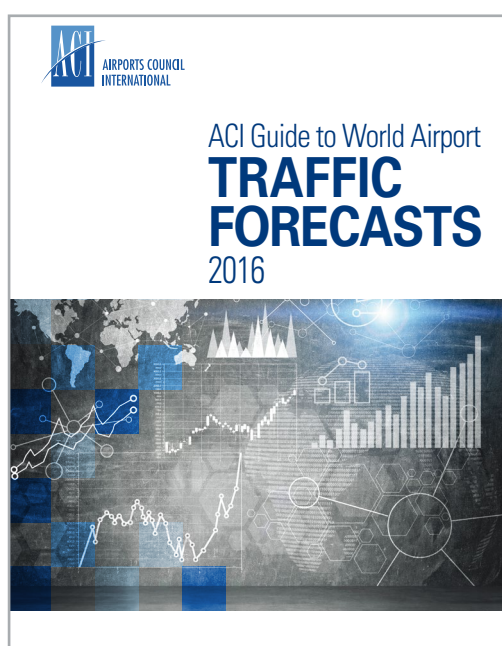
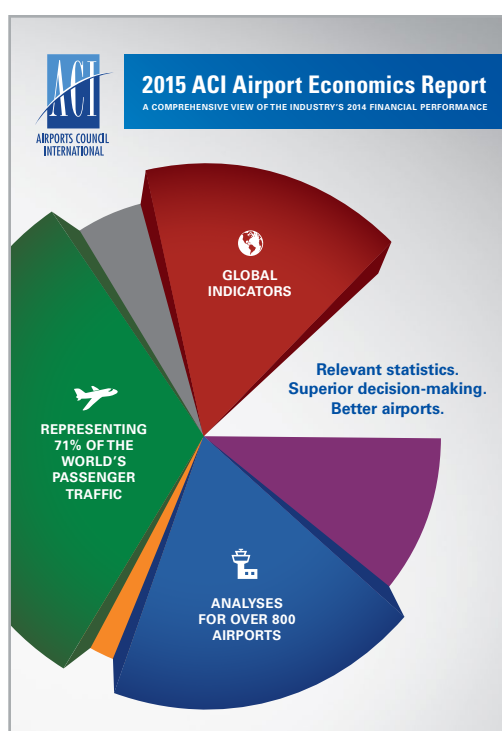
Economics and statistics

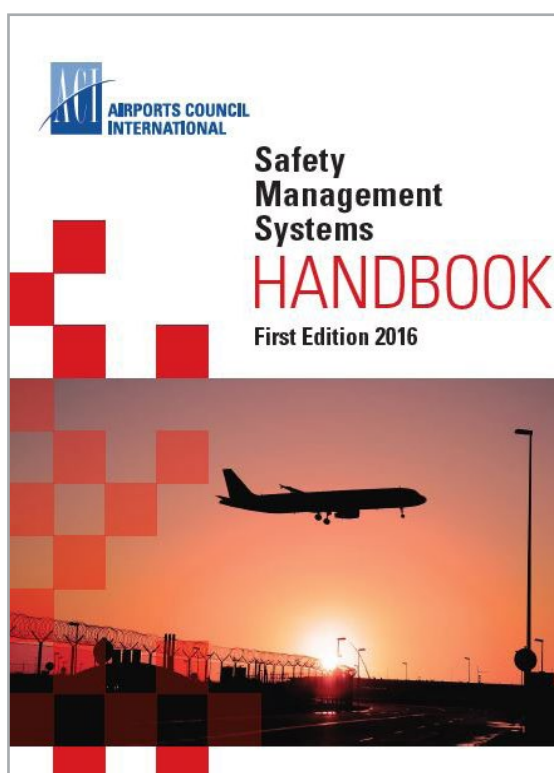
In 2016, ACI continued its commitment to providing an annual comprehensive analysis of airport traffic and detailed economic information. The release of the *2015 ACI World Airport Traffic Report*, as well as its companion, the *2015 ACI World Airport Traffic Dataset*, provided

trends, rankings and traffic statistics for a record high of over 2,300 airports in more than 160 countries. Both outputs covered domestic and international passenger, cargo (freight and mail) and aircraft movement.

The *2015 ACI Airport Economics Report* provided an invaluable measure of the airport industry's 2014/2015 financial and economic performance based on an annual data survey of the world's airports. Its companion, the *ACI Airport Key Performance Indicators* provided insight into areas ranging from financial and employee performance to fixed-asset productivity and airport operations. The complete package of indicators presented quantifiable barometers of industry activity for airport managers, analysts, investors and other aviation stakeholders.

The *ACI World Airport Traffic Forecasts 2016–2040* provided aggregate airport traffic figures for total passengers, air cargo volumes and aircraft movements. Both absolute figures and compounded annual growth rates were presented over three time horizons which include short-, medium- and long-term over the 2016–2040 period. Its companion, the *2015 ACI Annual World Airport Traffic Dataset (Excel)* covered airport traffic statistics for the 2015/2014 calendar year for over 2,300 airports in 160 countries.





Guidance material

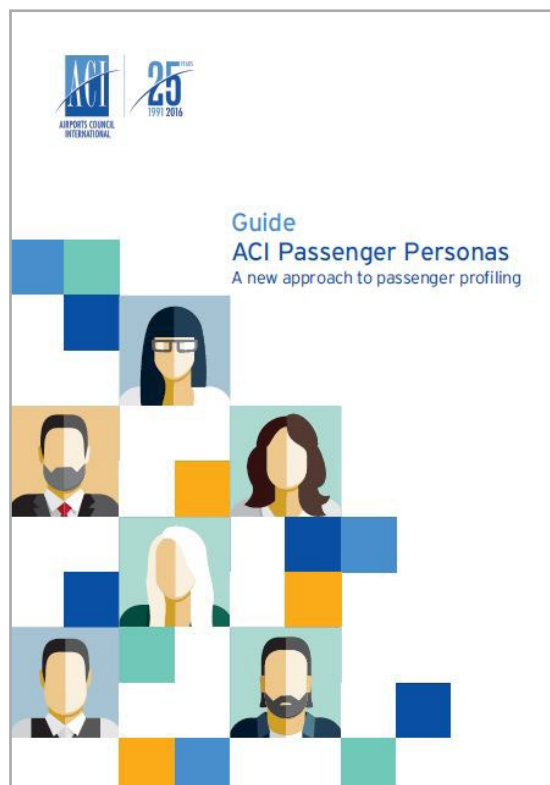
In 2016, ACI once again published guidance material and reference documents that were essential sources of information for airports. The *ACI Apron Safety Handbook*, presented by the ACI World Safety and

Technical Standing Committee brought together best practices, knowledge and experience from aerodromes around the world. It provided assistance to aerodrome operators in creating a robust Safety Management

System using the Plan, Do, Check, Act method.

Does passenger satisfaction increase airport non-aeronautical revenue? A comprehensive assessment research report became a vital tool for airports in their efforts to analyze, target and raise non-aeronautical revenue. The in-depth analysis placed a unique focus on the impact of customer service provision on commercial revenue performance, charting new paths to growth in both service performance and revenue delivery.

ACI's Airport Service Quality (ASQ) launched an innovative guide, [ACI Passenger Personas](#). Through six key personas based on ASQ 2015 passenger data gathered from over 550,000 travelers and 300 airports worldwide, the publication provides support to airports in developing a deeper understanding of the needs of the traveler.



Promoting airport excellence one student at a time

In keeping with ACI's mission of promoting professional excellence in airport management and operations, a major focus is on continuing education. For ACI, keeping abreast of current and emerging issues has been key to providing a diverse range of high quality, accessible and relevant academic courses and diplomas in the areas of safety, security, leadership and management, economics, environment, facilitation and customer service.

In 2016 the [ACI Global Training \(GT\)](#) team surpassed the 150 mark for the number of classroom courses delivered and celebrated the 10th Anniversary of the [ACI-International Civil Aviation Organization \(ICAO\) Airport](#)

[Management Profession Accreditation Programme \(AMAPA\)](#).

ACI's training initiatives are driven by the importance of building quality-driven capacity to help airport professionals in their pursuit of expertise, and provide a safe and secure environment for all aviation stakeholders and the communities they serve. Despite our continued growth, ACI has kept a strong focus on maintaining the quality of its courses which are measured in three areas: knowledge and teaching skills of faculty; quality of the course content; and, logistics.

2016 Results:

- 154 classroom courses and 2,920 classroom students
 - 23,571 online learning centre hours and 2,691 online students
- 3 language offerings:
 - English
 - French
 - Spanish



ACI-ICAO Aerodrome Certification course held in Johannesburg, South Africa, in June 2016



AMPAP graduates at the ACI-North America/World Annual General Assembly, Conference and Exhibition held in Montreal, Canada, in September 2016.

- 51 Faculty members
- 28 ACI-Concordia University Airport Executive Leadership Programme graduates
- 116 ACI-ICAO Global AMPAP International Airport Professionals and 2 Associate graduates
- 61 Global Safety Network (GSN) Initial Diploma graduates
- 13 GSN Advanced Diploma graduates;
- 189 graduates enrolled in the Airport Operations Diploma Programme
- Launch of the APEX in Safety Assessor Training Programme

2016 ACI Global Training Centres

ACI is indebted to the following members who are accredited as ACI Global Training Centres and enabled airport professionals worldwide to attend ACI courses.

Africa

Johannesburg, South Africa; Nairobi, Kenya

Asia-Pacific

Abu Dhabi, UAE; Incheon, South Korea; Hyderabad, India; Kuala Lumpur, Malaysia

Europe

Athens, Greece; Bucharest, Romania; Dublin, Ireland; Istanbul, Turkey

North America

San Francisco, USA

Latin America-Caribbean

Panama City, Panama; Port of Spain, Trinidad & Tobago; Montego Bay, Jamaica

ACI Global Training Venues

In order to meet our members' needs, specialized courses have also been offered in: Brussels, Belgium; Montreal, Canada; Beijing, China; Munich, Germany; New Delhi, India; Riga, Latvia; Seoul, South Korea; and, Vilnius, Lithuania

ACI Developing Nations Airport Assistance and ACI Fund

The [ACI Developing Nations Airport \(DNA\) Assistance programme](#) is complemented by the [ACI Fund](#). The role of the DNA programme is to provide assistance to member airports in developing countries.

2016 marked ACI DNA's fourth year, made possible through close cooperation with ACI's Regional Offices in Africa, Asia-Pacific and Latin America-Caribbean, along with the CIFAL Atlanta United Nations Institute for Training and Research.



ACI DNA Seminar on Non-Aeronautical Revenues held in Cairo, Egypt, in April 2016

Additionally, ACI is grateful to Hartsfield-Jackson Atlanta International Airport, which continued to provide administrative support to the programme.

Financial donors

- ACI Africa
- ACI North America
- Hartsfield-Jackson Atlanta International Airport

DNA: 2016 in review

- 17 DNA/ACI Fund seminars
- 3 language offerings
 - English
 - French
 - Spanish
- 411 students
- 51 participating countries
- US\$20,000 in ACI Online Learning Centre scholarships
- 14 course scholarships
- Creation of the APEX Safety Assessor Training Programme

The voice of the world's airports heard loud and clear

Communications

For 25 years, ACI has taken great pride in its growing reputation as the “voice of the world’s airports.” ACI understands that with this comes a responsibility to provide our members, industry stakeholders and the traveling public with the highest quality service. ACI aims to increase awareness of ACI’s advocacy, initiatives and information, all of which help airports as world leaders in economic development, environmental stewardship and the movement of people and goods by air.

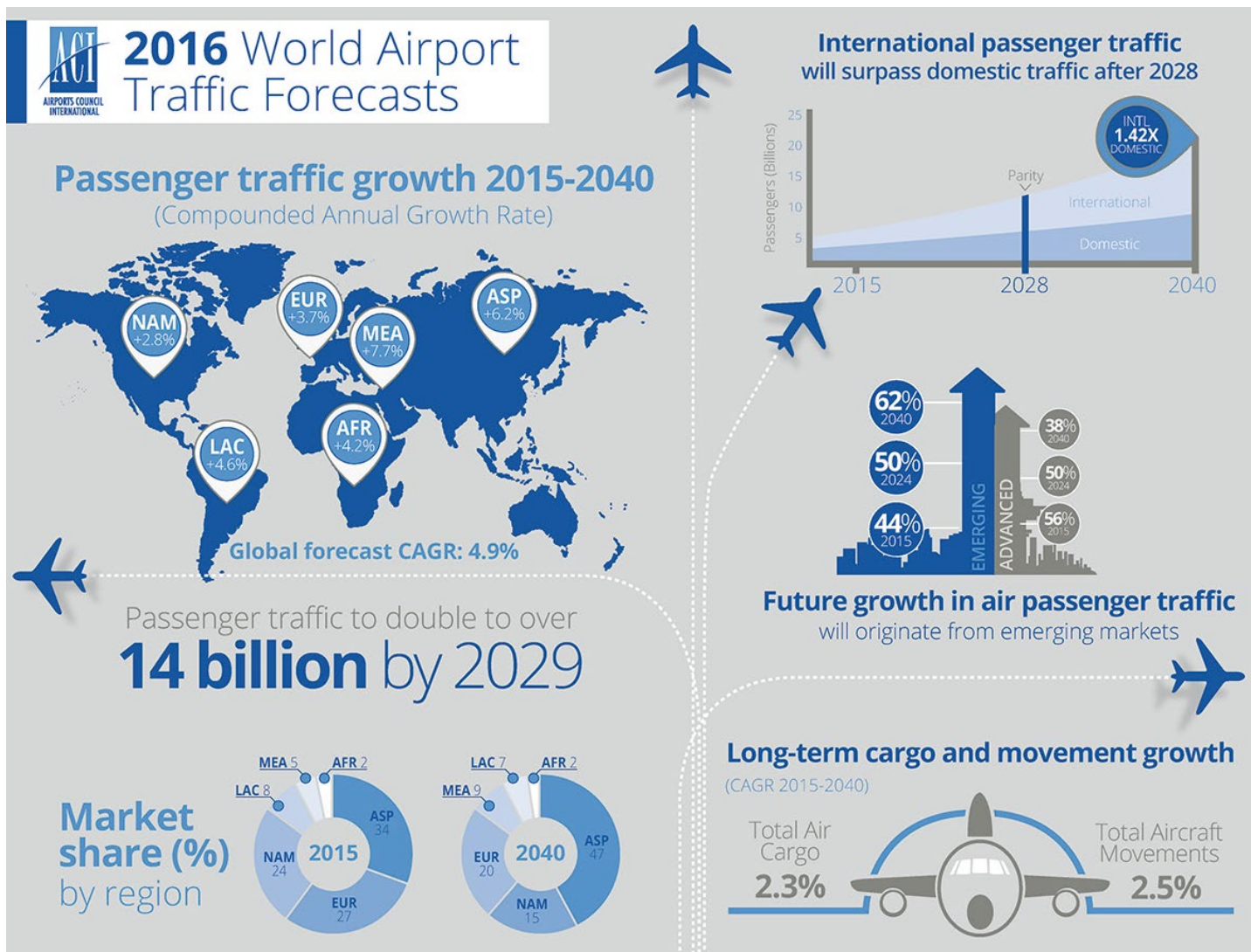
Started in 1991, the [ACI World Report](#) has evolved from a simple membership newsletter to a full-fledged monthly digital magazine read by aviation professionals, journalists and devotees around the globe. The growing readership of the publication throughout 2016 can be attributed to a fresh new design, which has highlighted cover stories from ACI Member airports. These articles

described the airport’s history, current and upcoming projects and how their relationship with ACI has affected their continued success.

In 2016, ACI created a series of informative videos to help communicate the organization’s important messages. This included a video celebrating ACI’s 25th Anniversary, featuring messages from Angela Gittens, Director General, ACI World and all five ACI Regional Directors. Other videos focused on the [ACI Airport Excellence in Safety Programme](#) and [ACI Airports Service Quality](#).

With the goal of raising awareness of ACI and its initiatives, ACI has increased the number of media releases: 55 [media releases](#) were distributed in 2016, a 35 per cent increase from 2015. Take-up has also increased, with the press monitoring service showing publication throughout the world.

ACI understands the importance of data and statistics to the airport industry,



and has designed infographics to present figures and analyses in a digestible and visually engaging way. The infographics were used at ACI conferences, in the ACI World Report and on ACI World's website and social media channels.



(From left) Angela Gittens, Director General, ACI World; Patti Chau, Regional Director, ACI Asia-Pacific; and, Olivier Jankovec, Director General, ACI Europe at the 8th Annual ACI Airport Economics and Finance Conference and Exhibition held in London, United Kingdom, in March 2016.

Events

Members also need to meet and exchange ideas on new and developing issues, and to hear from subject-matters experts from across the globe. ACI World's conferences provide the perfect platform for this exchange with over 5,000 delegates attending our events in 2016.

The 8th Annual ACI Airport Economics and Finance Conference and Exhibition, was held in March, in London, United Kingdom, and attracted over 225 delegates from 50 countries. For the second year running, the event was organized in cooperation with the World Bank, who ran the Aviation Symposium immediately before the conference. With aviation security issues leading the agenda, the conference also covered topics such as airport competition; economic regulation;



Opening session of the ACI-NA/World Annual General Assembly, Conference and Exhibition held in Montreal, Canada, in September 2016



The ACI World Economics and Statistics team and ACI World Events team at the 8th Annual ACI Airport Economics and Finance Conference and Exhibition held in London, United Kingdom, in March 2016.

infrastructure and capital expenditure; emerging markets; and, airport network development trends.

In April, the 11th ACI Asia-Pacific Regional Assembly, Conference and Exhibition hosted the 2015 Airport Service Quality (ASQ) Awards Ceremony in Gold Coast, Australia. The ceremony celebrated the world's top-performing airports for customer service. More than 40 airport representatives traveled to Gold Coast to receive their ASQ Awards.

In September, more than 2,300 delegates and 263 exhibitors from 60 countries attended the ACI-North America/World Annual General Assembly, Conference and Exhibition, in Montreal, Canada. Keynote speakers included the Canadian Transport Minister, Marc Garneau and the world renowned security expert Peter Bergen.



Kevin Burke, President and CEO, ACI North America and Angela Gittens, Director General, ACI World at the ACI-North America/World Annual General Assembly, Conference and Exhibition held in Montreal, Canada, in September 2016.

In the same month, The Trinity Forum, a tri-partite collaboration between ACI World, ACI Asia-Pacific and The Moodie Davitt Report, was held in Mumbai, India, and generously hosted by GVK and Mumbai Airports International Limited. The conference was organized under the theme “Adding value to the consumer journey in an onmi-channel age,” and saw airport executives,

retailers and brand experts participate in lively discussions.

Aviation Security (AvSec) World, a joint event with the International Air Transport Association (IATA) and International Civil Aviation Organization (ICAO), held in Kuala Lumpur, Malaysia, in October was well attended. The event brought together key industry and regulatory stakeholders to discuss challenges such as those highlighted by recent terrorist attacks on landside security.

Throughout 2016, ACI World worked closely with industry partners to support events such as the Global Sustainable Aviation Forum, the ICAO Air Transport Symposium and the ICAO World Aviation Forum.

In the same vein, ACI joined forces with industry colleagues to host a networking reception on the occasion of the 39th ICAO General Assembly in October. Close to 200 senior representatives from the 191 member States of ICAO attended. This gave ACI the opportunity to discuss issues of interest to airports directly with high level regulators opening the door to continued dialogue through the coming years.



ACI World and Regional staff at AvSec World held in Kuala Lumpur, Malaysia, in October 2016.

ACI closed the year with the second annual Investing in Airports conference, organized in cooperation with ICAO and the International Transport Forum at the Organization for Economic Co-operation and Development. Aviation stakeholders, including airports, airlines, regulators and investors, met in Goa, India, to deliberate what constitutes a sustainable environment for airport investment under the theme “Creating the conditions to meet future demand.”

ACI is preparing the 2017 conference programme which will continue to anticipate our member’s expectations in providing platforms for the airport community to meet and discuss emerging issues and solutions.

[ACI Africa]

In the past 25 years, [ACI Africa](#) has rapidly evolved to become the most recognized and influential airport representative body for the African region. ACI Africa has recorded commendable growth in its membership, conference participation, member engagement and support from regional staff. ACI Africa has continued to advance despite the fragile economic climate.

[ACI Africa membership](#)

ACI Africa has experienced broad based growth in membership, resulting in a total of 62 regular members from 48 countries managing 250 airports with 28 World Business Partners by the year's close.

[The African economy](#)

Despite the fragile economic climate, African growth remained healthy, and several African countries such as Côte d'Ivoire, Djibouti, Ethiopia,



Ali Tounsi, Secretary General, ACI Africa

Mozambique, Rwanda and Tanzania were found at the top of the charts, with growth rates between 6 and 10 per cent.



DNA course on air routes development security held in Maputo, Mozambique, in October 2016



DNA course on non-aeronautical revenue generation held in Cairo, Egypt, in April 2016

Air transport in Africa

African air transport continued to face many challenges, which limited its potential to greatly expand air passenger traffic due to limitations on routes and service areas. To promote growth and allow private initiatives to develop, significant reforms must be made at the regional level. Only the effective liberalization of air transport would lead to increased traffic, improved air safety and a reduction in air transport prices. The emergence of an African sky that is more open and less fragmented is essential to Africa's overall development.

2016 training

As part of our strategy to improve qualifications of member airport personnel, ACI Africa placed great emphasis on offering training seminars and scholarships to our members. ACI Africa, in coordination with the [ACI Fund](#) and the [Developing](#)



Safety course held in Lome, Togo, in April 2016

[Nations Assistance \(DNA\) programme](#), established free training programmes for member airports. These programmes offered training to over 200 participants in different airport management fields throughout 2016.

Specifically, DNA courses on non-aeronautical revenues and airport security were offered in Cairo, Egypt, in April 2016; and air routes' development, and environmental sustainability courses were held in Maputo, Mozambique, in October 2016.

APEX in Africa

The Africa region has hosted more [APEX in Safety](#) reviews than any other region in the world—a clear indication that safety is a fundamental precursor to the industry's sustainable growth. In order to ensure the development and continuity



APEX Safety Auditors training course held in Casablanca, Morocco

of the programme, in March 2016 ACI World launched the APEX Safety Assessor Training programme for the African region, where participants were trained to become accredited APEX assessors. The first training session in Casablanca, Morocco, in November 2016, enabled the new assessors to join experienced colleagues in APEX teams on missions to selected airports. Further training sessions were planned to increase participation and contribute to creating much-needed expertise in the region.

ACI Africa is also pleased to report that it is not just airports that see the value of APEX; the World Bank funded a review of Cairo International Airport, and a multi-year partnership agreement was signed with the European Aviation Safety Agency (EASA). EASA has agreed to provide funding assistance in Central and West Africa so that airports in least developed countries can benefit from the programme. In 2016, Maya-Maya Airport in Brazzaville, Congo; and Douala International Airport and Yaoundé Nsimalen International Airport in Cameroon, were supported by EASA funding.



The 2016 Award for Best Airport in Africa went to Sir Seewoosagur Ramgoolam International Airport.

ACI Africa Airport Safety Excellence Awards

ACI Africa held the inaugural Safety Awards during the Gala Dinner of the 25th ACI Africa Annual General Assembly, Conference and Exhibition held in Maputo, Mozambique, in October 2016. The awards recognized excellence and professionalism in the management of aerodrome safety.

The award for Best Improvement in Safety went to Félix-Houphouët-Boigny International Airport; for Best Improvement Following an APEX Review to Gnassingbé Eyadéma

International Airport; for Best Airport in Africa to Sir Seewoosagur Ramgoolam International Airport; and, the runner up



The 2016 Award for Best Improvement Following an APEX Review went to Gnassingbé Eyadéma International Airport.

for Best Airport in Africa went to Cape Town International Airport.

Airport Carbon Accreditation Award

Communications programme and newsletter

As part of ACI Africa's communication strategy, a newsletter was developed to inform members of current happenings in the industry. This information is disseminated to more than 6,000 ACI Africa recipients daily, and the response has been overwhelmingly positive.

This past year several ACI Africa Members have achieved or retained their status of carbon accreditation through the *ACI Airport Carbon Accreditation programme*. ACI Africa presented these member airports with awards to acknowledge their achievements and encourage greater participation across the board. They included:



The 2016 Award for Best Improvement in Safety went to Félix-Houphouët-Boigny International Airport.

- *Airport Carbon Accreditation* at Level 1 Mapping: Marrakesh Menara Airport and Casablanca Mohammed V International Airport
- Upgrade to Level 2 - Reduction of the *Airport Carbon Accreditation*: Félix-Houphouët-Boigny International Airport and Libreville International Airport

2016 ACI Africa Events

ACI Africa organized two successful conferences in 2016:

- ACI Africa Regional Conference and Exhibition held in Cairo, Egypt in April 2016—generously hosted by the Egyptian Holding Company for Airports and



Safety course held in Ndjamena, Chad, in May 2016

Air Navigation. The theme of the conference was “Economic sustainability of African airports: Challenges and opportunities.”

- The 25th ACI Africa Annual General Assembly, Regional Conference and Exhibition, held in Maputo, Mozambique, in October 2016—kindly hosted by Aeroportos de Mocambique. The theme of the conference was “Air connectivity in Africa, the role of airports.”

ACI Africa will continue to contribute tirelessly to the sustainable development of a safe and secure air transport for the region. We thank all our members and staff for their support and numerous contributions. We look forward to an even more successful year in 2017 where we will aim to achieve the effective liberalization of air transport in Africa.



ACI Africa Regional Conference and Exhibition held in Cairo, Egypt, in April 2016

[ACI Asia-Pacific]

2016 was a productive year for ACI Asia-Pacific as we continued to provide enhanced services, new industry reports and networking opportunities to our growing membership; strengthen our engagement with the International Civil Aviation Organization (ICAO) regional offices and industry partners; and, reinforce our role as one of the most reputable and influential aviation organizations in the region.

New leadership

The Regional Assembly held in Gold Coast, Australia, in April 2016 elected Kerrie Mather, the Managing Director and Chief Executive Officer of Sydney Airport, as the new ACI Asia-Pacific President for a two-year term. Mather took over the reins from Dennis Chant who had retired from Queensland Airports Limited.



Patti Chau, Regional Director, ACI Asia-Pacific

Engagement with ICAO

The Asia-Pacific region continued to represent the interests of Asia-Pacific airports at the 53rd Conference of Directors General of Civil Aviation, Asia and the Pacific Region (DGCA) conference held in Colombo, Sri Lanka, in August 2016. The DGCA conference, with the theme “Fostering safe, secure and efficient aviation system in an eco-friendly environment with No Country Left Behind,” was hosted by the Civil Aviation Authority of Sri Lanka. Over 300 delegates from States in Asia and the Pacific as well as representatives from industry partners including the International Air Transport Association (IATA) and the Civil Air Navigation Services Organisation (CANSO).

The discussions focused on the five ICAO strategic objectives, namely safety; security and facilitation; navigation capacity efficiency; environmental protection; and, air transport economics. Three Information Papers were submitted by ACI covering APEX in Safety, APEX in Security and *Airport Carbon Accreditation* to provide updates and solicit support from Civil Aviation regulatory bodies.

ACI Asia-Pacific was involved in supporting the ACI Working Paper on airport slots presented at the 39th triennial ICAO Assembly in Montreal in September 2016. The Regional Office solicited support and encouraged our regional members to actively engage with their respective national authorities on the airport slots issue and to gather relevant slot use data to back ACI’s position.

To support the ICAO Working Group on cross-subsidization within airport networks, the region (in collaboration with ACI World) visited Beijing, China, in December 2016. The ACI delegation met with relevant stakeholders to discuss the definition of networks; availability of data; benchmarking methodology; and, relevant performance indicators.

Building connections and members engagement

The region recorded another year of growing membership. At the close of the year, the region had 104 airport members and 79 World Business Partners (WBPs) from 48 countries. The region has steadily enhanced its reputation as the key association representing Asia-Pacific airports' interests and providing improved services to better meet members' needs.

During the year, the region reached out to a number of members to foster closer connections and partnership:

- Together with Angela Gittens, Director General of ACI World, the Regional Office met with the newly formed Malaysia Aviation Commission (MAVCOM) in Kuala Lumpur in October 2016. The visit allowed the two organizations to exchange their missions and initiatives. MAVCOM subsequently sent a delegation to the ACI conference on Investing in Airports held in Goa, India, in December 2016 and has agreed to attend the ACI Economics and Finance Conference in London, United Kingdom, in March 2017.
- During the same month, the Regional Office visited Tehran, Iran and met with the management team from Iran Airports Company (IAC) and Imam Khomeini International Airport (IKIA). With the sanctions lifted earlier in 2016, IAC and IKIA are poised to modernize their facilities and make their airports the best and safest in the Middle East. Through the Global Training and Airport Excellence (APEX) programmes, ACI plans to support IAC and IKIA achieve their ambitions.
- The annual WBP Airport Tour, a unique service available in the Asia-Pacific region, was held in November 2016. For the first time, invitations were extended to ACI EUROPE's WBPs. The tour provided an opportunity for representatives from 10 WBPs to explore business opportunities available at Muscat International Airport, Hamad International Airport, and airports managed by Iran Airports Company.



2016 WBP Airport Tour participants in front of the Lamp Bear, a 23-foot bronze sculpture at Doha International Airport.

Regional Assembly resolutions

The 11th ACI Asia-Pacific Regional Assembly, Conference and Exhibition held in Gold Coast, Australia in April 2016 saw a record breaking attendance. Hosted by Queensland Airports Limited, the event attracted over 550 delegates, representing over 230 organizations from 52 countries.

At the Assembly, members unanimously approved resolutions to support ACI Initiatives on airport safety and security, including urging airports to set up Runway Safety Teams; promote a safety culture; and, participate in APEX in Security reviews.



(From left) Patti Chau, Regional Director, ACI Asia-Pacific; Angela Gittens, Director General, ACI World; Declan Collier, Chair, ACI World and CEO, London City Airport; Dennis Chant, Outgoing President, ACI Asia-Pacific; and, Chris Mills, CEO, Queensland Airports Limited at the ribbon cutting ceremony of the 11th ACI Asia-Pacific Regional Assembly, Conference and Exhibition held in Gold Coast, Australia, in April 2016.

Aviation security

In November 2016, ACI Asia-Pacific participated in the APEX in Security Pilot Review in Indonesia with assessors from North American, European and African airports. The new APEX in Security programme was well received by the aviation community when the Regional Office presented an Information Paper during the 4th ICAO

Regional Aviation Security Forum in Colombo, Sri Lanka, in August.

ACI's engagement with regulators came to fruition after years of participating in ICAO regional security events and collaborative projects with individual governments. One example is the joint effort between ACI Asia-

Pacific, the Australian government and other agencies in producing *A guide to developing and implementing a Suspicious Activity Identification Program at airports*.

The region also participated in Smart Security Opportunity Assessments at several airports in Japan and Thailand over the course of the year.

Economics

One of our key projects in airport economics was the release of the inaugural *ACI Asia-Pacific 2015 Economic Review* in July 2016 - produced under the guidance of the Regional Economics Committee. The review provided high-level insights from the ACI Annual Economic survey from the region's perspective and gave pointers for future development.

In addition, the region worked closely with ACI World and stepped up its advocacy efforts in India by adopting a multi-pronged approach. To increase public awareness of airports' perspective on the issue of airport charges, ACI published a press release in June 2016 in response to India's National Civil Aviation Policy (NCAP) voicing its support for hybrid tills and welcoming a number of initiatives stipulated in the NCAP.

To support our members in regulatory hearings before the Airports Economic Regulatory Authority of India (AERA), ACI prepared written submissions throughout 2016 that addressed various concerns including Mumbai International Airport's tariff review in May; AERA's regulatory approach on capital cost regulation in August; and, AERA's consultation regarding the implementation of hybrid tills under NCAP in October.



(From left) Patti Chau, Regional Director, ACI Asia-Pacific; Douglas Webster, COO, DIAL; Angela Gittens, Director General, ACI World; and, Indana Prabhakara Rao, CEO, DIAL at the *Airport Carbon Accreditation* ceremony at the ACI-North America/World Annual General Assembly, Conference and Exhibition held in Montreal, Canada, in September 2016.

Environment

The region continued to promote sustainability and recorded encouraging results in 2016. ACI Asia-Pacific proudly welcomed the region's first two carbon neutral airports through the *Airport Carbon Accreditation* programme: Indira Gandhi International Airport and Rajiv Gandhi International Airport.

Significant progress was also made in China and Japan as ACI Asia-

Pacific welcomed the first accredited airports from these countries: Beijing Capital International Airport, Kansai International Airport and Osaka International Airport.

The region continued to promote the *Airport Carbon Accreditation* programme and other environmental initiatives through ICAO meetings such as the 53rd DGCA Conference and the

Eco-Airport Workshop in Indonesia. The region also sent promotional letters to the regional Ministries of Transport and Environment to provide programme updates and highlight cooperation with the United Nations Framework Convention on Climate Change.

The Regional Environment Committee published the *ACI Asia-Pacific Environmental Survey 2015 Report*. The report helped airports assess their environmental situation; design and implement environmental initiatives; and, improve environmental management.

Cabin waste disposal was a substantive problem for airports and airlines, and the Regional Environment Committee worked with IATA and ACI World to publish guidance in November 2016 to help airports and airlines address this issue together.

Safety

Asia-Pacific initiated a project to share aerodrome safety performance data among Regional Safety Committee



Asia-Pacific airports gathered in Gold Coast, Australia, to celebrate *Airport Carbon Accreditation's* fifth year in the Asia-Pacific region.

members to help improve safety in the mid- to long-term. The Regional Safety Committee began drafting guidance materials on safety promotion and change management, both important elements of Safety Management Systems.

APEX in Safety Reviews were conducted in Bahrain, China, Indonesia and Qatar during the year. Asia-Pacific airport representatives also participated as safety assessors at reviews in other airports.

During the year, the Regional Office has represented airports at various ICAO Asia-Pacific and ICAO Middle East safety meetings to ensure that the views of airports were adequately reflected in new policies and regulations related to aerodrome operations.

Training and development

ACI Asia Pacific would like to congratulate Sunil Kumar Munnangi of GMR Hyderabad International Airport Limited who was named the “Young Executive of the Year 2016.” And, Adelaide Airport achieved the ACI Asia-Pacific Human Resources Excellence Recognition, an accolade that recognized outstanding achievements in Human Resources management.

Three airports from Cambodia, Iraq and Mongolia benefited from Financial Assistance for Training, enabling their staff to attend ACI training courses and airport study tours. Three ACI Developing Nations Airport Assistance (DNA) courses were delivered in Australia, Cambodia and India, for a total of 46 participants.

Events

Opportunities for members to network with the aviation community in 2016 were abundant as the region successfully organized a series of key industry events including:

- ACI 8th Annual Airport Economics and Finance Symposium and Conference held in London, United Kingdom, in March 2016 (with ACI World and ACI EUROPE);



(From left) Eric Delobel, CEO, Cambodia Airports; Patti Chau, Regional Director, ACI Asia-Pacific; H.E. Mao Havannall, Secretary of State and Secretariat of Civil Aviation, Cambodia Government; and, Arun Mishra, Regional Director, ICAO Asia and Pacific Office at the opening ceremony of the ACI Asia-Pacific Small and Emerging Airports Seminar held in Siem Reap, Cambodia, in October 2016.

- 11th ACI Asia-Pacific Regional Assembly, Conference and Exhibition held in Gold Coast, Australia, in April 2016;
- The Trinity Forum held in Mumbai, India, in September 2016 (with ACI World and The Moodie Davitt Report);
- ACI Asia-Pacific Small and Emerging Airports Seminar held in Siem Reap, Cambodia, in October 2016; and,
- Security and Crisis Management Special Summit held in Brussels, Belgium, in November 2016 (with ACI EUROPE).

[ACI EUROPE]

To describe last year as eventful would be an understatement. This would be true in almost any region of the world, but none more so than in Europe. With the terrorist attacks at Brussels and Istanbul airports, Brexit, the ratification of the Paris Climate Change Agreement and COP22, **ACI EUROPE** had a particularly active year in 2016.

The year began with an intense debate between the European Commission and aviation industry stakeholders at the EU Aviation Summit. Europe's airports urged European Union (EU) Member States to move forward with the Aviation Strategy adopted by the European Commission (EC) in December 2015. In particular, they stressed the need for the EU bloc to start negotiations of aviation agreements with the ASEAN countries, the Gulf and Turkey without delay. They also called on the EU to address the airport capacity crunch facing Europe and tackle the regulatory obstacles that hamper competition.

ACI EUROPE organized events in Brussels to provide insights into the



Olivier Jankovec, Director General, ACI EUROPE

most relevant EU policy and legislative matters for its members. The first was the 2nd EU Policy workshop, attended by representatives of EU institutions, advocacy experts and European airports. And the second was a visit to Brussels Airport, for assistants and political

advisors of the European Parliament's Committee on Transport and Tourism and its Committee on Civil Liberties, Justice and Home Affairs.

Airport security: Safeguarding airports against threats

As a result of the terrorist attacks in the public areas of Brussels and Istanbul airports, landside security returned to the top of the EU agenda. ACI EUROPE steered the regulators response to these attacks by working closely with the EC and engaging with the relevant transport authorities to promote a common sense approach to landside security.

Our advice on the prospective additional risks of screening passengers outside airport terminals led the EC to endorse our Position Paper on Airport Landside Security, thus refraining from imposing additional EU-wide landside security measures. This paper was also used to restate the validity of this approach to the Belgian authorities, who subsequently lifted their additional checks.

ACI EUROPE with the Association of European Airlines and Hilde Vautmans (Member of the European Parliament), co-hosted a debate on airport security and post-attack management by airlines and travel authorities. The ACI EUROPE Aviation Security Committee also produced Landside Security Best Practice Guidelines.

At the ACI-North America (NA)/World Annual General Assembly, Conference and Exhibition held in Montreal, Canada in September 2016, the ACI EUROPE and ACI-NA Boards met with the then US Transportation Security Administration to discuss the vulnerabilities of landside security and on how the EU and the US

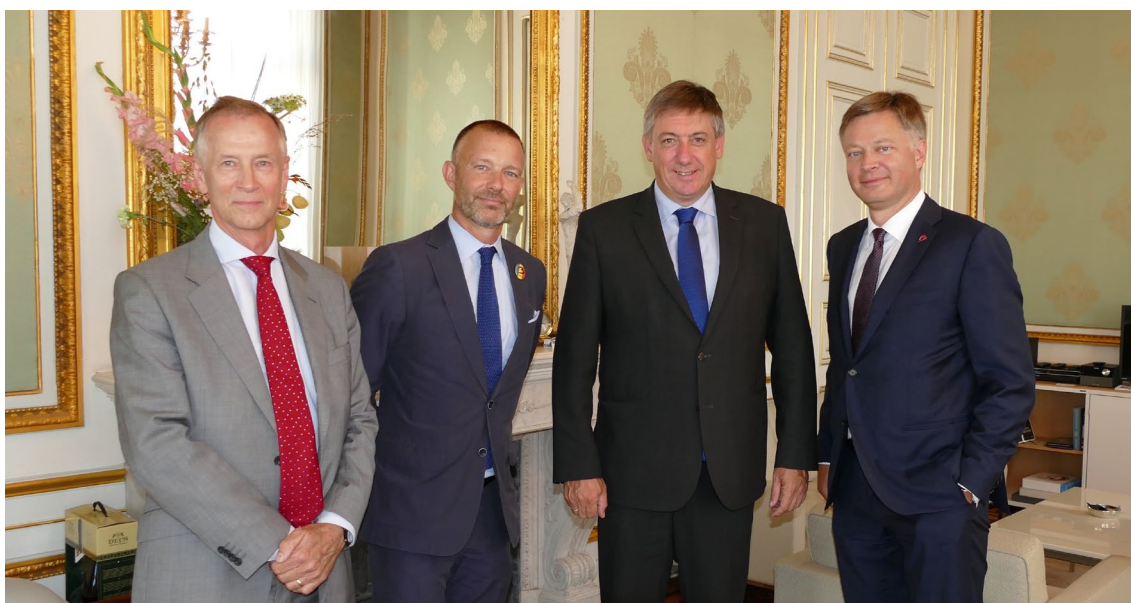
could continue to cooperate to address the terrorist threat. ACI EUROPE also met with the Russian transport authorities to encourage them to remove the current systematic landside security checks at Russian airports.

coordinated responses to threats affecting aviation; ways to deepen cooperation between technology providers and airport stakeholders; and, solutions to identify and cope with radicalized employees.

And finally, ACI EUROPE with ACI Asia-Pacific, organized a special ACI Security and Crisis Management Summit in Brussels (hosted by Brussels Airport) in November 2016. Top aviation security experts and policy makers debated



ACI EUROPE organized a visit to Brussels Airport offered to assistants and political group advisors of the European Parliament's Committee on Transport and Tourism and, Committee on Civil Liberties, Justice and Home Affairs.



(From left) David Ryder, Head of Aviation Security, ACI EUROPE; Olivier Jankovec, Director General, ACI EUROPE; Jan Jambon, Vice-Prime Minister of Belgium and Minister of Interior and Security; and, Arnaud Feist, CEO, Brussels Airport, discussed security measures at Belgian airports.

Cyber security: On the radar

With the growing awareness of the potency of cyber-attacks, the ACI EUROPE Aviation Security Committee updated an information paper on cyber security. This paper raises awareness and provides airports' best practices.

Putting the focus on airport investment

ACI EUROPE released *Leveraging Airport Investment to Drive the EU's Aviation Strategy* in June 2016. The paper keeps analysing the link between airport charges and investment in capacity and service quality and clearly demonstrated

how more intrusive regulation, as requested by the airlines, would be counterproductive to the industry as a whole.

To promote ACI's position on airport charges, ACI EUROPE organized an Airport Investment Symposium in Brussels, Belgium, in November 2016. Attendees were top institutional and industry stakeholders, including the EU Transport Commissioner; Vice President of the European Investment Bank; airlines; and, European airport CEOs and private investors.

Airport ownership: The rise of private investment

ACI EUROPE published an all-new 2016 edition of *The Ownership of Europe's Airports* which showed that private involvement in Europe's airports had almost doubled since 2010. This had been driven by a mix of deliberate policy choices, State budgetary constraints and the need to promote air connectivity by investing adequately in the development of airport infrastructure.

New airport connectivity trends

ACI EUROPE published the 3rd edition of the *Airport Industry Connectivity Report*. This Report found that while it had been a good year for direct connectivity growth, indirect connectivity (which included flights via a transfer airport) did not increase accordingly. This development was unusual and probably reflected shifts in the airline market.

BREXIT

One of the key developments in Europe during the year was the United Kingdom's (UK) decision to leave the EU after 43 years. When the result of the referendum was announced in June 2016, ACI EUROPE was the first air transport stakeholder to call for the EU and UK aviation markets to remain integrated. In addition, ACI EUROPE in collaboration with the UK's Airport Operators' Association, hosted a special workshop titled *Post-Brexit & Airports – Possible scenarios for EU-UK aviation relations*.



In line with our Recommended Practice, over 100 airports in Europe made drinking water more available after security checkpoints in 2016.

Focusing on consumers: Making drinking water more available

Keeping the focus on consumers, ACI EUROPE promoted its Recommended Practice on the provision of good quality drinking water to mitigate the effects of the continuing regulatory ban on passengers taking bottled water through security checkpoints. As a result, over 100 airports in Europe made water available after security checkpoints by installing water fountains or low cost water initiatives. The EU Transport Commissioner has repeatedly expressed her appreciation for the proactive approach of airports in this regard.

Cooperating for passenger accessibility

To mark the 10th Anniversary of the adoption of Regulation (EC) 1107/2006 concerning the rights of disabled persons and persons with reduced mobility when traveling by air, ACI EUROPE and the European Disability Forum signed a Memorandum of Understanding at the 26th ACI EUROPE Annual Congress, General Assembly and Exhibition in Athens, Greece, in June 2016.

This partnership would guarantee a seamless traveling experience to people with reduced mobility and people with disabilities by accessible, comfortable and high-quality service and assistance on a non-discriminatory basis. As its first initiative, the Accessible Airport Award was launched at the 12th Annual ACI EUROPE Best Airports Awards in Athens, Greece, in June 2016.

Sharing the benefits of Collaborative Environmental Management

ACI EUROPE and EUROCONTROL co-organized the 2nd Collaborative Environmental Management (CEM) workshop held in Budapest, Hungary, in September 2016, kindly hosted by Budapest Airport. This workshop focused on how to get started with CEM and gained interest from both airports and Air Navigation Service Providers.

Performance-Based Navigation and noise management

In collaboration with the SESAR Joint Undertaking, ACI EUROPE organized a one-day workshop on the implementation of Performance-Based Navigation and

noise management in November 2016. This workshop provided insights from several SESAR experts in this area, such as on Augmented Approaches to Land and RNP Implementation Synchronization in Europe.

Airport Carbon Accreditation

In 2016, airports took further steps toward reducing their carbon footprint through the *Airport Carbon Accreditation* programme. By the end of the year, 28 airports worldwide were recognized as carbon neutral, and 180 airports were certified, the latter representing 37% of global air passenger traffic. The increased momentum of the programme in North America was seen in the accreditation of 11 new airports. Africa moved ahead with the accreditation of Marrakesh-Menara Airport and Mohammed V International Airport in Morocco.

Airport Carbon Accreditation also featured as one of the top 15 transport-related climate action initiatives at the 22nd Conference of the Parties (COP22) in Marrakesh. A session about the programme, “Les aéroports se mettent au vert,” was run by the French Civil Aviation Authority, and there was also

a special *Airport Carbon Accreditation* certification ceremony for the two Moroccan airports.

In September, ACI EUROPE released the *Airport Carbon Accreditation Annual Report*. The key figures were also published on www.airportCO2.org.



The *Airport Carbon Accreditation* Ceremony celebrated certified airports in North America during the 2016 ACI-North America/World Annual General Assembly, Conference and Exhibition held in Montreal, Canada, in September 2016.

Integrating airports in the future ATM system

In 2016, ACI EUROPE established a new four-year partnership with the EU's Single European Sky ATM Research (SESAR) programme. It would offer a variety of workshops, studies and publications aimed at raising awareness of the advantages in modernizing ATMs. At the same time, ACI EUROPE and its dedicated SESAR-related Deployment Airport Operators Grouping platform facilitated the award of €46 million in European Union funding to ATM-related airport projects.

Review of the EU's Aviation Safety Regulation

ACI EUROPE engaged closely in legislative discussions about the future of the EU's Aviation Safety Agency (EASA) and the review of the Aviation Safety Regulation in 2016. The review is expected to be completed in early 2017 and to lay the ground for European rules on new areas like drones and cybersecurity, and provide

EASA the remit to draft rules on ground handling safety. ACI EUROPE argued for a performance-based approach that reduced the compliance burden while improving safety.

EU safety certification for European airports

By the end of 2017, the majority of European airports would undergo a certification process in line with new EU aerodrome safety rules introduced in 2014. ACI EUROPE has worked with its members to enable a seamless transition to the new framework, partly through a platform that has brought together airport safety experts to exchange information about ways to comply with EASA rules.

Single European Sky ATM Research workshops

As part of ACI EUROPE's ongoing cooperation with SESAR, 2016 saw two workshops hosted by Riga International Airport and Bratislava Airport. These



Celebrating ACI's 25th Anniversary at the Gala Dinner of the 26th ACI EUROPE Annual Congress, General Assembly and Exhibition held in Athens, Greece, in June 2016.

aimed at raising awareness of the solutions that SESAR is delivering to the airport community in areas such as ground surface management, collaborative decision-making, safety nets, remote tower technology and enhanced approach and landing procedures.

Marking 25 years of service

ACI EUROPE marked ACI's 25th Anniversary in ways that took stock of how far the airport industry has come and the progress we had made together, by being proactive and engaging in the exchange of knowledge.

ACI Latin America-Caribbean

2016 was a very active year for the [ACI Latin-America Caribbean \(LAC\)](#), made all the more memorable with the celebration of ACI's 25th Anniversary. We continued to increase the relevance of our voice throughout the region by providing members with a variety of high-quality services and activities.

ACI-LAC initiatives

In 2016 ACI-LAC promoted several initiatives and programmes in collaboration with ACI World. At the close of the year the [Airport Service Quality \(ASQ\) programme](#) was deployed in 33 airports throughout the region. We also made a good start in the *Airport Carbon Accreditation* programme, with four airports that achieved carbon accreditation. We congratulate Galapagos Airport, the world's first 100% environmentally sustainable airport, that achieved an upgrade to Level 2 in the *Airport Carbon Accreditation* Programme.

Training was another priority established by the ACI-LAC Board in 2016. Notably, 150 airport employees



Javier Martínez Botacio, Director General, ACI-LAC



The 4th ACI-LAC Airport Leadership and Human Capital Forum held in San Juan, Puerto Rico, in June/July 2016.

from 20 different airports throughout the region completed the third phase of the Airport Management Diploma in partnership with ITAérea Aeronautical Business School and 85 participants completed the first edition of the online course for ARFF Chiefs.

In addition, 14 ACI Global Training courses, six Global Safety Network courses and six ACI-LAC courses were conducted throughout the year. Furthermore, the fourth edition of the ACI-LAC Leadership and Human Capital

Forum was kindly hosted by Aerostar in Puerto Rico.

Regional Committees reactivation

In August 2016, ACI-LAC convened the Technical Committees in Miami, USA. More than 35 participants from 16 airport operators met for four days to discuss regional subject matters pertaining to airport economics;

regulatory and legal affairs; safety; and, environmental protection.

World Business Partners airport tour

The first ACI-LAC World Business Partners (WBPs) airport tour took place in June 2016. More than 15 executives representing 11 companies and accompanied by Javier Martinez Botacio, Director General, ACI-LAC, toured El Dorado International Airport in Bogotá, Colombia and Tocumen International Airport in Panama City, Panama.

ACI-LAC Annual Assembly, Conference and Exhibition

Finally in November 2016, the ACI-LAC Annual Assembly, Conference and Exhibition took place in Brasilia, Brazil, bringing together more than 340 delegates from 35 countries under the theme “25 years of airport management: Innovation and change, the challenge for the future.”

The two day conference provided delegates with the opportunity to deliberate on the future challenges and opportunities of the aviation



ACI-LAC held the Technical Committee meetings in Miami, USA, in August 2016.



ACI-LAC World Business Partners at the construction site of the future Terminal 2 of Tocumen International Airport in Panama City, Panama.



Exhibition opening at the ACI-LAC Annual Conference and Exhibition, Brasilia, Brazil, in November 2016

industry in Brazil including collaboration and integration among industry organizations; and, concessions contracts and airport infrastructure financing. The conference also held sessions on enhancing capacity beyond infrastructure; facilitation challenges; facing security threats; and, airport commercial trends.

Airport product and service providers participated in the exhibition portion of the event, and for the first time at an ACI-LAC Annual Assembly, Conference and Exhibition, a WBP breakfast was held with more than 60 representatives. We would like to

extend our appreciation to Inframercia for their kind support.

The General Assembly elected the new ACI-LAC President, Martin Eurnekian from Aeropuertos Argentina 2000 and thanked Hector Navarrete for his dedication and commitment to the organization during his term.

ACI-LAC is proud of its achievements over the course of 2016 and thanks its members for their collaboration and continued support throughout a very successful year. We look forward to our 2017 successes.

ACI North America

More and more, our industry issues are not confined to one airport, one country, or one continent. Our ability to bring airports together is enhanced by [ACI North America's](#) (NA) global connection through ACI World and its partner regions that work cooperatively to advance airports' priorities on a global scale. These connections are becoming ever more important as we continue to look outside our borders to develop best practices and policy solutions in challenging areas such as environmental protection, security and passenger facilitation.

In 2016, the ACI-NA team in Washington and Ottawa continued to provide the highest quality service to our members with forward-thinking advocacy and intelligence for the benefit of our members, communities and passengers who travel through airports every day.

As one of the biggest challenges facing airports around the world, modernizing airport infrastructure remained a top priority for ACI-NA.



Kevin M. Burke, President and CEO, ACI-NA

In Canada, the Canadian Airports Council (CAC) continued to work diligently to educate policymakers and the public about the importance of Canada's airports to the country's



Airports@Work Conference held in Austin, USA, in April 2016

economy and the benefits of new investment in airport infrastructure for all airports, large and small. CAC has been working to educate the Canadian ministers and key policy makers on airport priorities and policy concerns arising from the recommendations of the Canada Transportation Act review.

In the United States, ACI-NA made tremendous progress in 2016 in providing airports with the tools

they need to fund essential airport infrastructure needs, like modernizing the Passenger Facility Charge user fee as part of Federal Aviation Administration reauthorization. While we have much more work ahead of us, ACI-NA remained fully committed to seeking a long-term, self-sustaining solution to airport infrastructure needs.

Collaboration was another top priority for North American airports. ACI-NA's



(From left) Kevin M. Burke, President and CEO ACI-NA and Peter V. Neffenger, Administrator, Transportation Security Administration

leadership and knowledge is driven by engaged members who seek a robust forum for dynamic cooperation and the development of industry excellence. Over the last few years, we have created new tools and resources to keep our members ahead of the curve. Examples include our guidance resources on unmanned aircraft systems; concessions management; and, ride-booking apps. We strengthened our industry

benchmarking surveys covering finance, concessions and environmental protection, and are expected to collect data for our re-imagined Guest Experience Management and Passenger Amenities Survey. Through these resources, ACI-NA is able to provide members with intelligence to make informed decisions to better develop their businesses.

Mobile Passport Control is another way ACI NA has worked to enhance the passenger experience. Launched two years ago through our partnership with Airside Mobile and US Customs and Border Protection, our [Mobile Passport Control](#) app was designed to facilitate fast and efficient entry into the United States while maintaining the highest security standards. With more than one million downloads, passengers are taking advantage of this time saving technology to get through customs faster at 20 airports. This success exemplifies the value of ACI-NA and the role we play in building partnerships. Through the work on Mobile Passport, ACI-NA's relationship with CBP has never been stronger, and has expanded to other government agencies that look to ACI-NA as a solutions provider. This



Mobile app engagement at the Business of Airports Conference held in Orlando, USA, in April 2016

in turn supports the members who look to ACI-NA to solve the significant passenger facilitation issues they face each day.

When security checkpoints at airports faced long wait times during the 2016 summer travel season, ACI-NA worked closely with the Transportation Security Administration (TSA) and key political figures on Capitol Hill. ACI-NA led the charge in Washington to seek long-term relief for airports and passengers alike

by offering industry recommendations to TSA to improve efficiency at airport security checkpoints. Many of ACI-NA's recommendations were adopted and we continue to work with TSA to advance the remaining recommendations to prevent long lines, queues and crowds in the future.

At our Business of Airports Conference, ACI-NA launched another innovative tool to help our members understand the complex financial landscape in



Kevin M. Burke, President and CEO; ACI-NA at the Business of Airports Conference held in Orlando, USA in April 2016.

which they operate. In partnership with Dallas-Fort Worth International Airport, we launched [Centerlines Finance](#), an app that provides airports with key financial indicators that can be benchmarked with their peer airports. The app also provides users with the ability to manipulate and share data to help make sound financial planning decisions.

For many years, North American airports have undertaken important work to implement environmental best practices and enhance their communities. In 2016, airports in the ACI-NA region went one step further to address their impact on climate change by managing their carbon emissions through the, now global, [Airport Carbon Accreditation programme](#). During the 2016 ACI-NA/World Annual General Assembly, Conference and Exhibition, twenty North American airports achieved carbon accreditation. Dallas-Fort Worth International Airport was recognized as the first North American airport to achieve carbon neutral status through the programme.

The active participation of our members drives our team's effectiveness in Washington and Ottawa and our ability to deliver quality intelligence to help position North American airports to stay ahead of tomorrow's challenges.

In February 2016, ACI-NA started the Challenge 2025 Initiative as a way to better understand the issues airports expected to face over the coming decade. Through member-driven task forces, each group focused on one of



Kevin M. Burke, President and CEO, ACI-NA, interviewed by CNN

five challenges: Air service development; workforce planning; the evolving airport business model; security and facilitation; and, airport infrastructure. These groups made progress in identifying a path forward that would guide ACI-NA's mission over the next decade.

These core challenges are not limited to US or Canadian airports. Every airport around the world is preparing to face these same challenges in the years ahead. Working together and taking advantage of global connections, we can ensure a competitive and progressive airport industry that serves to benefit its passengers and communities.

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