

european regions airline association



State of the Industry Address

Andrew Kelly, President, ERA





european regions airline association



Your association; here and now Juan-les-Pins, ERA General Assembly 2019

Montserrat Barriga, Director General, ERA



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ERA airline members contribution



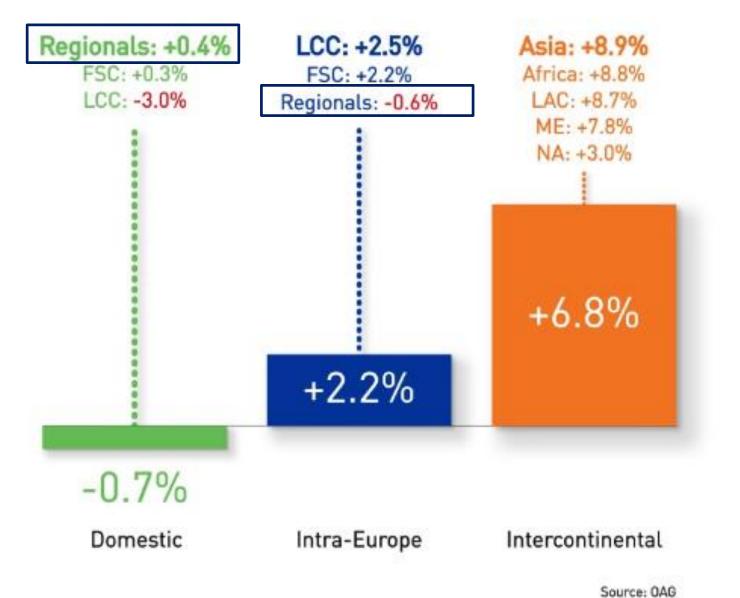
Using a fleet of 730 _ 105 80 OPtate passenger cargo outes ^{flights} per year aircraft aircraft 57% 43% jet prop aircraft aircraft ▶ 80 seats D average seating capacity 770,000 Carrying 74 A contribution of **BOARDING PASS** direct, indirect and illion induced jobs generated by the industry passengers of which 290,000 directly per year to Europe's GDP by generated by our members the regional industry



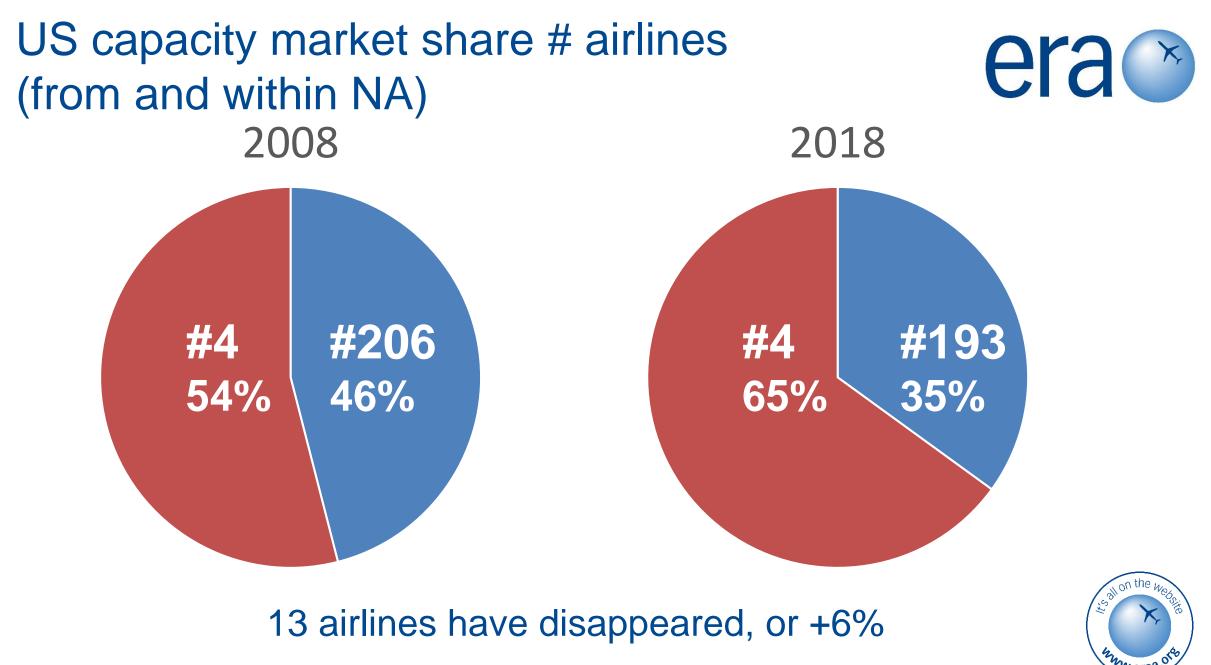


Airline seat capacity summer 2019

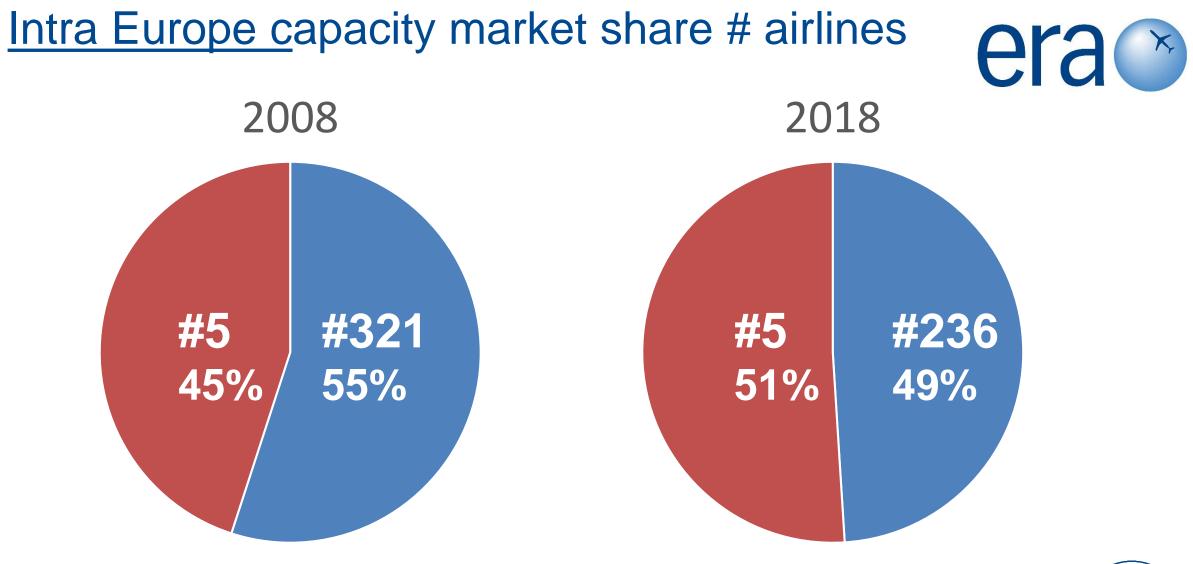








Source Citi Research, Diio Mi



85 airlines or 26% have disappeared in 10 years



Source Citi Research, Diio Mi

ERA member airlines: Lobbying for all regardless of their size



Medium/Large 500+ staff 49%

SME 1-500 staff 51%



Advocacy priorities for EU action





Airport charges & slots

Air ticket distribution

SPI IR, Crew training ATM congestion Safety matters

EU261

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D	oes it reall	y protect th	ne passenge	n		
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- 1. Reduced compensation for airlines with less than 2.5 m pax
- 2. Exoneration on **PSO routes**

EU261

- 3. Cap on the liability limited to the proportion of the airfare
- 4. Extraordinary circumstances for the **whole flight programme** for the day to acknowledge the knock-on effect.
- 5. Complete exoneration if delays or cancellations arise for any safety-related reason
- 6. Time threshold extended from 3 to 5 hours.
- Airlines may not be prevented from recovering costs and expenses by any contractual provision excluding or limiting liability.



Does it really protect the passenge



Air ticket distribution

- Key principles
 - → level playing field
 - → fair competition
 - → transparency
- Same rules must apply to all competing players (GDS, gatekeepers, airline alliances, metasearch and others)
- Airline content discriminatory initiatives erodes consumer choice



Brussels Office: ERA (European Regions Airline Association), Office 50.710, Eurocontrol, Rue de la Fusée, 96, 1130 Brussels, Belgium



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Aviation and climate change

Flight Shaming Puts a Dent in European Travel **Bloomberg**

Airlines' CO2 emissions rising up to 70% faster than predicted

Carbon dioxide emitted by commercial flights rose by 32% from 2013 to 2018, study shows



'Flying Shame' Is Now Starting to Ground Swedish Business Travel Bloomberg

TUI HALTS FLIGHTS BETWEEN NL

AND PARIS OVER EMISSIONS

Most people in the UK back limits on flying to tackle climate change NewScientist

'Worse Than Anyone Expected': Air Travel Emissions Vastly Outpace Predictions The New York Times



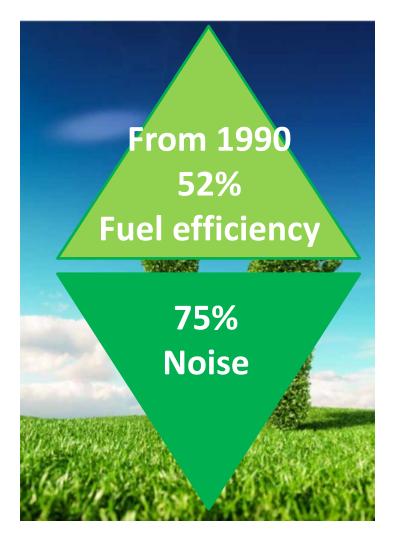
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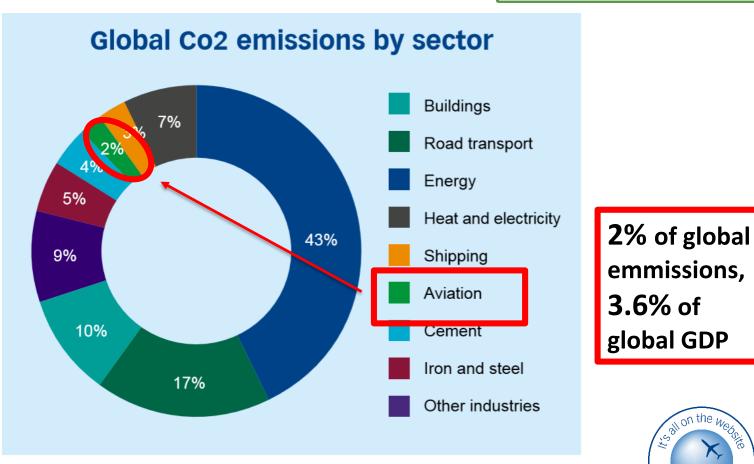


Aviation's responsibility in climate change



mw.erað





Source: ATAG, European Commission

ERA efforts: Green & Sustainable Connectivity

- ERA own study
- Communication activities
 - → ERA sustainability campaign
 - → ERA sustainable connectivity session at the European Parliament
 - → ERA Regional Airline Conference 2020 sustainability theme

wide	Bint	АТ	BRA			Air Iceland Connect	
Rolls-Royce and No airline Widerøe laur research programm emissions aviation Leading industrial tec company Rolls-Royce Widerøe, the largest r airline in Scandinavia	Binter reduces the consumption of play board Binter has taken anoth its sustainability policy reducing the use of play	Awards ATR is granted Gold Trop transport plan designed	in the world offering passengers biofuel every time	1,000,000 trees and thus neutralises more than 200	electric plane se	Air Iceland Conne passengers can their carbon foot New carbon calcu the opportunity to impact of air trave	aircraft Embraer unveiled today, on the eve of its 50th anniversary, images of its demonstrator aircraft



Industry working together on sustainability

- > ATAG industry-wide campaign
- European Sustainable Aviation Roadmap (ESAR)





- 1- Take stock of the current situation
- 2- Renew our commitments
- 3- Call for the right measures and policies to support the industry effor

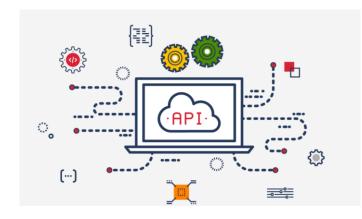


Priorities for EU action - Brexit





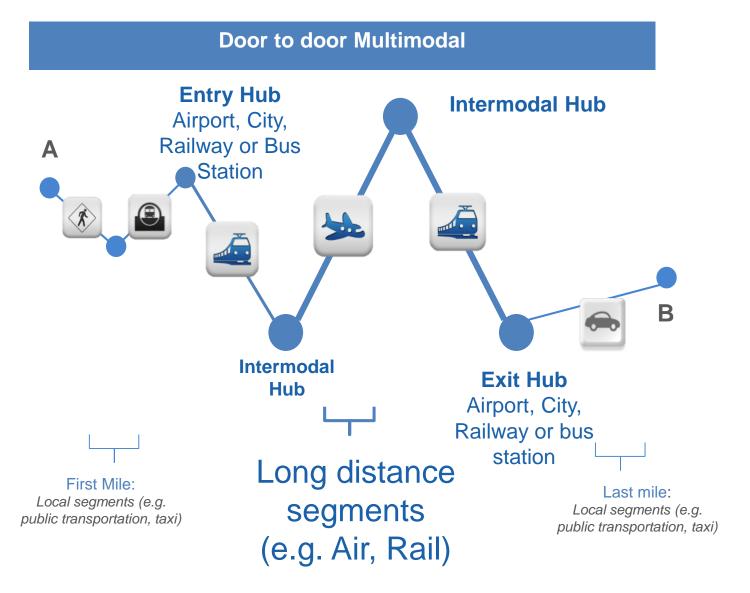
Opportunities: Technological support, digitalisation era

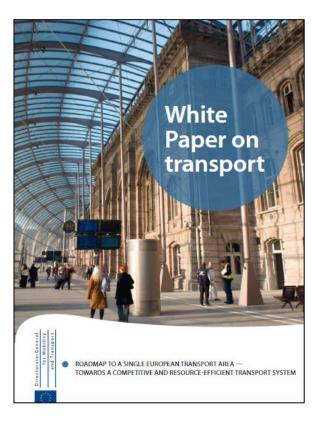


- Greater collaboration is seen across the wider travel industry
- > API, agile partnerships
- Need for aggregation, search and comparison
- > Unique experience, choice, personalization
- Technologies to offset disruption, big data, process automation
- > Intermodality



Opportunities: Multimodal transport taking traction eracion

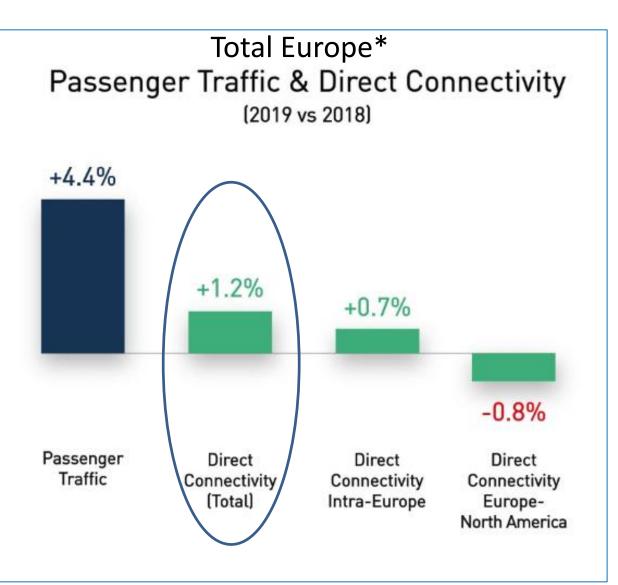






Opportunities: New routes





In 2019, ERA airlines have reduced their intra-European city pairs by nearly 2% but increased their flights by 14,000



Opportunities: Learning, best practice sharing ERA publications



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Opportunities: Networking and learning, industry cooperation

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ERA work groups, workshops & events

- Operations
 Oct & Mar
- Air Safety
 Mar, Sep & Dec
- Industry Affairs
 Feb, Jun, Nov
- EP Sustainability Nov19
- CFO Workshop
 Feb
- Airline Summit July

ERA Regional Airline Conference 2020











Thank you

