

BARCELONA 2014



Your association in perspective

Simon McNamara
Director General

BARCELONA 2014



Your association in perspective

Simon McNamara
Director General

Our mission

Through leadership, representation and communication to serve the interests of ERA's members and promote a healthy, safe and growing European regional airline market

Leadership

Bringing members together through ERA and speaking as the voice of our industry

Representation

Speaking for our members on industry affairs, safety, operational, maintenance, financial and security issues

Communications

Telling our members, regulators & politicians what we do, why we do it and why our business is important

Our mission

Through leadership, representation and communication to serve the interests of ERA's members and promote a healthy, safe and growing European regional airline market

Leadership

Bringing members together through
ERA and speaking as the voice of our
industry

Representation

Speaking for our members on industry affairs, safety, operational, maintenance, financial and security issues

Communications

Telling our members, regulators & politicians what we do, why we do it and why our business is important

Our mission

Through leadership, representation and communication to serve the interests of ERA's members and promote a healthy, safe and growing European regional airline market

Leadership

Bringing members together through ERA and speaking as the voice of our industry

Representation

Speaking for our members on industry affairs, safety, operational, maintenance, financial and security issues

Communications

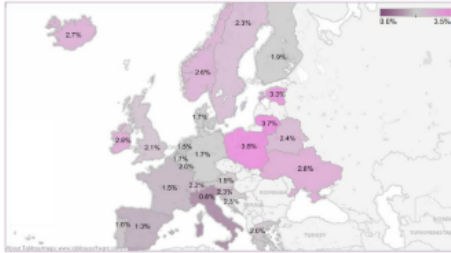
Telling our members, regulators & politicians what we do, why we do it and why our business is important



Leadership

Bringing members together through ERA and speaking as the voice of our industry

The numbers - European economy and growth

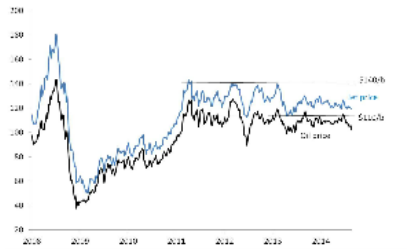


A two speed Europe

Compounded Annual GDP Growth Rate (CAGR) 2013-2022

Source: EU - Real GDP (2011 prices) / Index of 2013 = 100

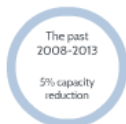
The numbers - fuel



Sustained high fuel prices

Source: Platts/IATA

The numbers - regional performance Europe



Continuing challenges but optimism for the future



Source: Ameyata, SEABURY

Speaking as the voice of the industry

Our 173 members give the association strength

- We fly **960,000 flights per year**
- transporting **45 million passengers per year**
- on **71 minute average sector times**
- between **1,200 point to point routes**
- using aircraft of, on average **67 seats**
- Our members generate **280k direct, indirect & induced jobs**
- and they contribute **€47bn to Europe's GDP**

Bringing members together

We bring members together

- CEOs summit
- General Assembly
- Regional Airline Conference
- Advisory Groups
- Partnering with RAA, IATA, ACI, Eurocontrol and the Flight Safety Foundation



Speaking as the voice of the industry

Our 173 members give the association strength

- We fly **960,000** flights per year
- transporting **45 million** passengers per year
- on **71 minute** average sector times
- between **1,200** point to point routes
- using aircraft of, on average **67 seats**
- Our members generate **280k** direct, indirect & induced jobs
- and they contribute **€47bn** to Europe's GDP

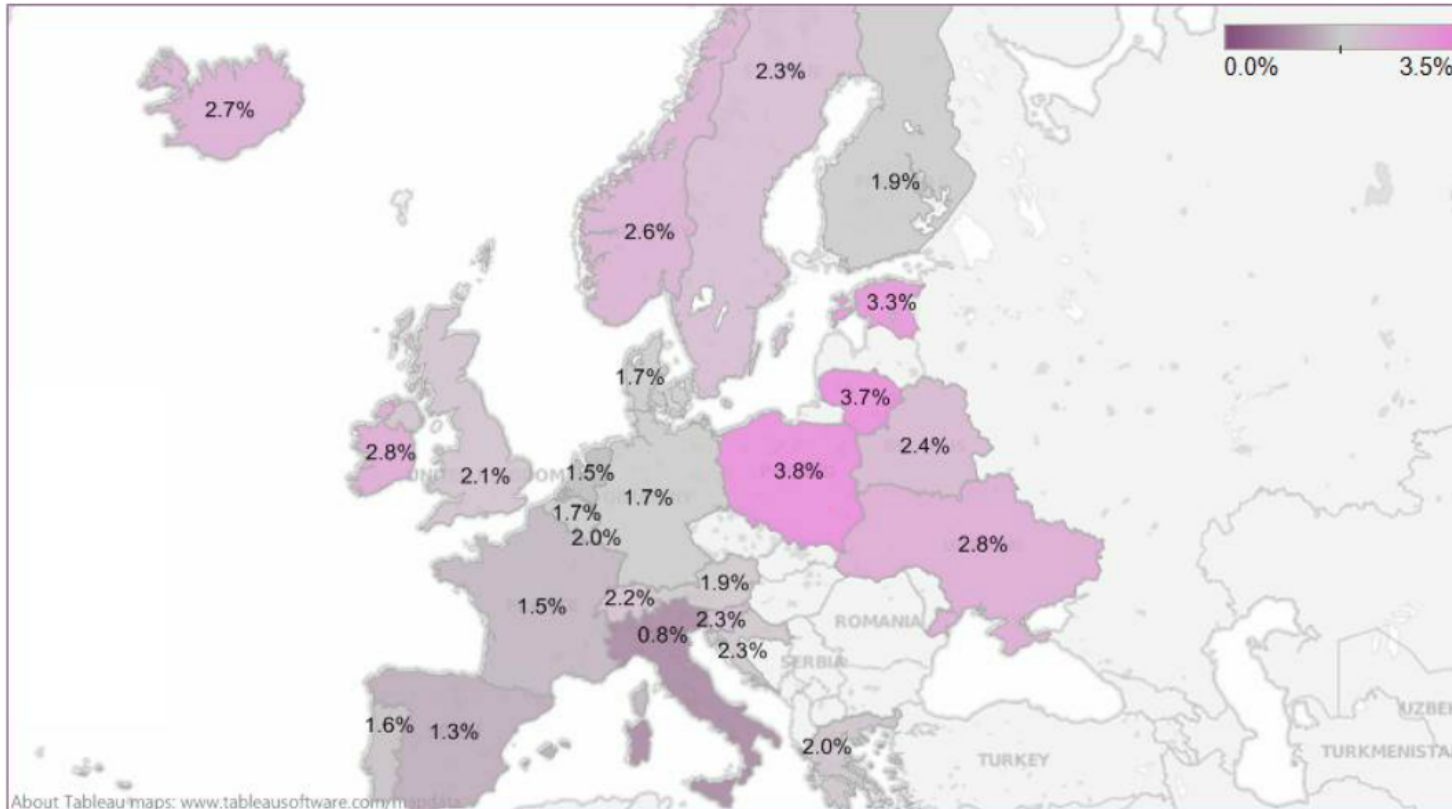
Bringing members together

We bring members together

- CEOs summit
- General Assembly
- Regional Airline Conference
- Advisory Groups
- Partnering with RAA, IATA, ACI, Eurocontrol and the Flight Safety Foundation



The numbers - European economy and growth



A two speed Europe

Compounded Annual GDP Growth Rate (CAGR) 2013-2022

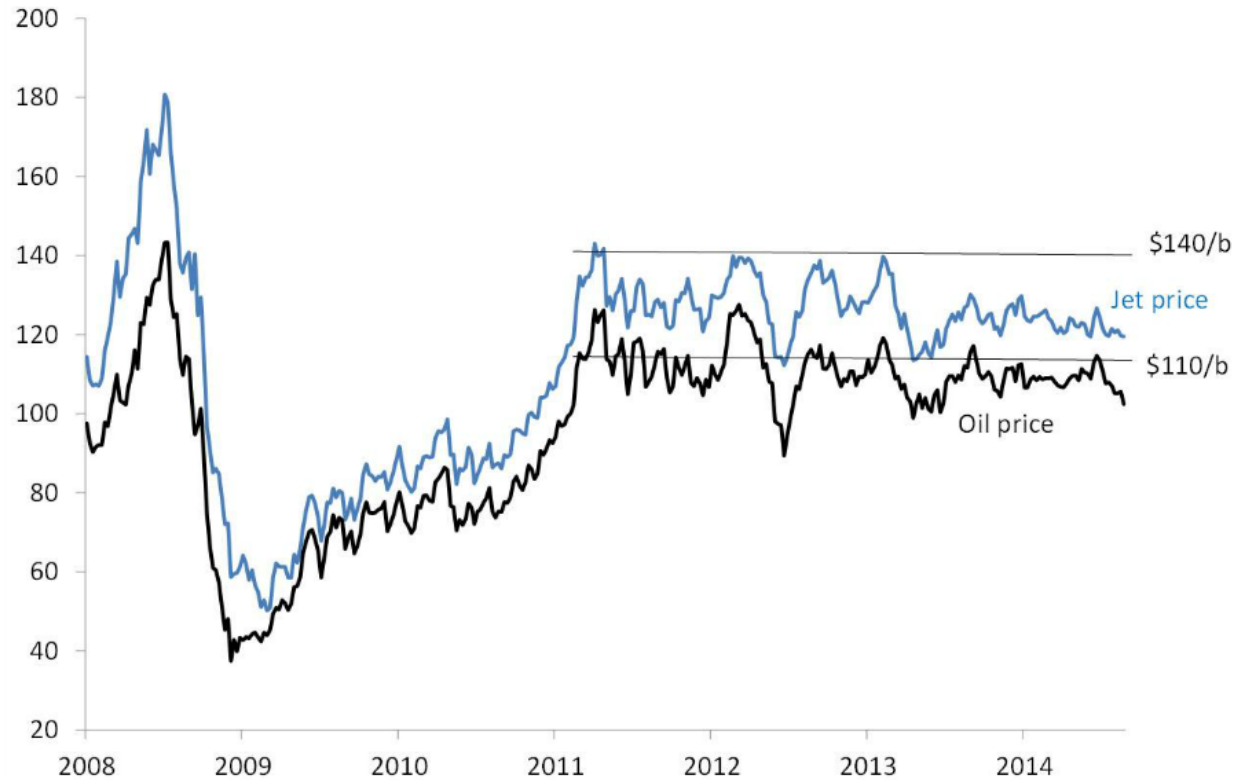
Source : EIU - Real GDP (US\$ at 2005 prices) forecast of 2013 - 2022

The numbers - fuel

Compounded Annual GDP Growth Rate (CAGR) 2013-2022

Source: EIU - Real GDP (US\$ at 2005 prices) forecast of 2013 - 2022

The numbers - fuel



*Sustained
high fuel
prices*

Source: Platts/IATA

The numbers - regional performance Europe

The past
2008-2013

5% capacity
reduction

This year
Jan-Sept 2014

3% capacity
reduction

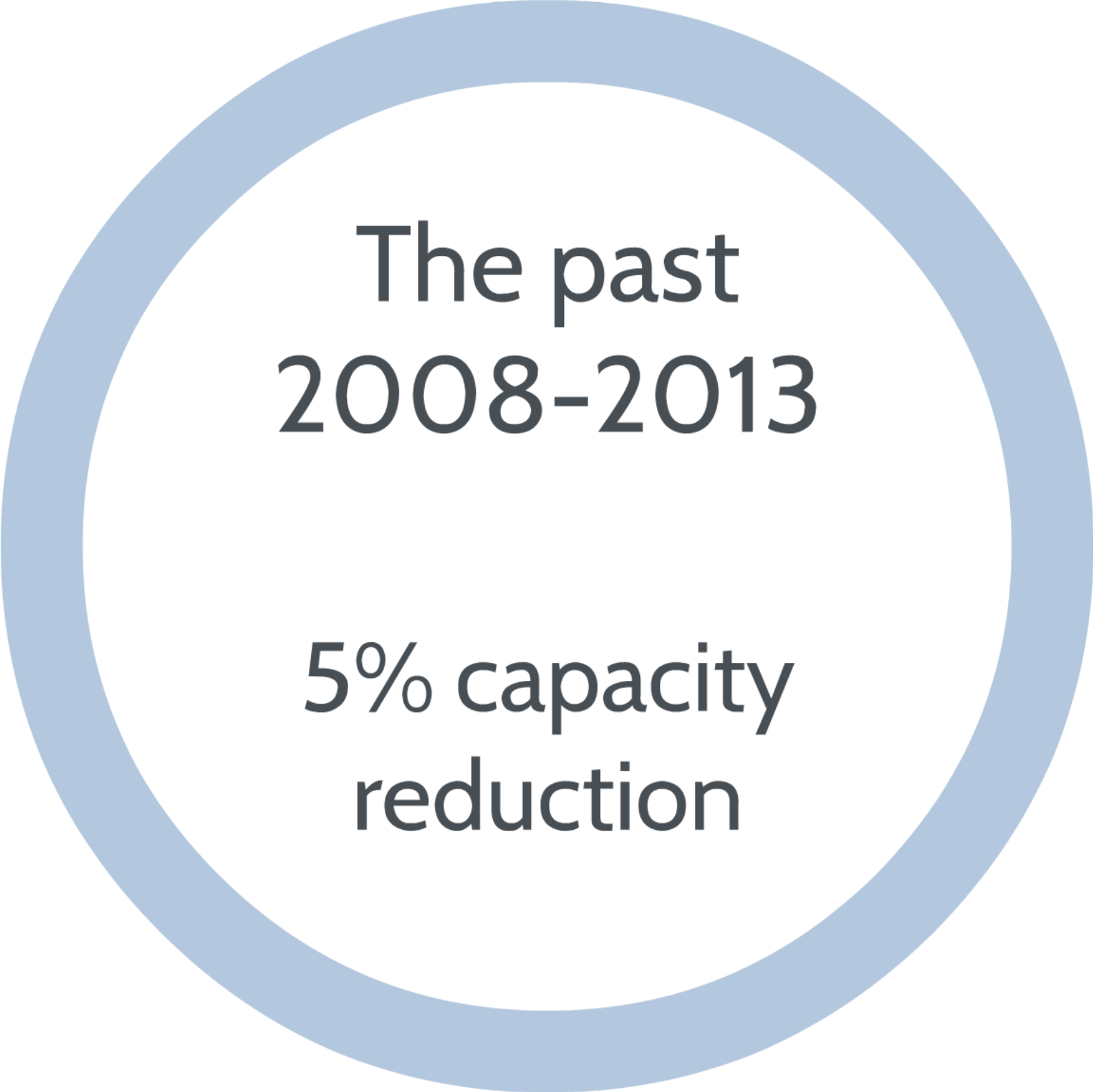
*Continuing
challenges
but optimism
for the future*

This year
Jan-Sept 2014

4% increase in
routes served

Looking ahead
Winter 2014

3% capacity
increase



The past
2008-2013

5% capacity
reduction



This year
Jan-Sept 2014

3% capacity
reduction



This year
Jan-Sept 2014

4% increase in
routes served



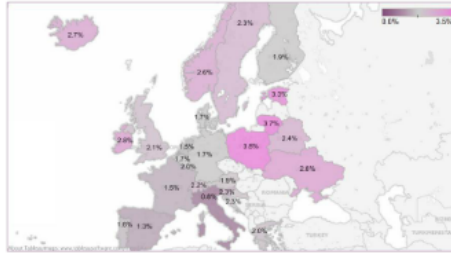
Looking ahead
Winter 2014

3% capacity
increase

Leadership

Bringing members together through ERA and speaking as the voice of our industry

The numbers - European economy and growth

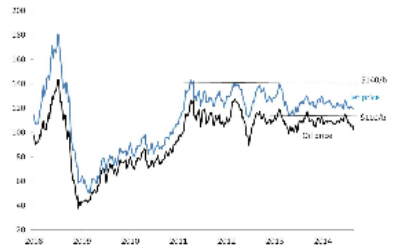


A two speed Europe

Compounded Annual GDP Growth Rate (CAGR) 2013-2022

Source: EU - Real GDP (2011 prices) (seasonally adjusted)

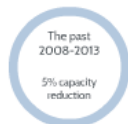
The numbers - fuel



Sustained high fuel prices

Source: Platts/IATA

The numbers - regional performance Europe



Continuing challenges but optimism for the future



Source: IATA, SEABURY

Speaking as the voice of the industry

Our 173 members give the association strength

- We fly **960,000 flights per year**
- transporting **45 million passengers per year**
- on **71 minute average sector times**
- between **1,200 point to point routes**
- using aircraft of, on average **67 seats**
- Our members generate **280k direct, indirect & induced jobs**
- and they contribute **€47bn to Europe's GDP**

Bringing members together

We bring members together

- CEOs summit
- General Assembly
- Regional Airline Conference
- Advisory Groups
- Partnering with RAA, IATA, ACI, Eurocontrol and the Flight Safety Foundation





Representation

Speaking for our members on industry affairs, safety, operational, maintenance, financial and security issues

Speaking for members

*ERA is **the** recognised body by Europe's regulators*



Speaking for members

Lobbying, representing and defended members on key strategic issues

- Lobbying and advocacy
- Contingency planning
- Security
- Future avionic equipage
- Flight time limitations
- Flight crew licencing
- Fatigue Risk management
- Crisis coordination
- Winter operations
- Air safety
- Disruptive passengers
- Passenger rights
- Ground handling
- Slot allocation
- Carriage of persons with reduced mobility
- Delivery of new airport capacity in the EU
- EU and national taxes & charges
- State aid
- EU noise regulations
- EU emissions trading scheme developments
- Ownership & control rules

Speaking for members

Our specialist groups keep us connected with our members

- Air Safety
- Industry Affairs
- Operations
- Maintenance
- Chief Financial Officers
- Legal



Speaking for members

ERA is the recognised body by Europe's regulators



Speaking for mem

Speaking for members

Our specialist groups keep us connected with our members

- Air Safety
- Industry Affairs
- Operations
- Maintenance
- Chief Financial Officers
- Legal



Speaking for members

Lobbying, representing and defended members on key strategic issues

- **Lobbying and advocacy**
- Contingency planning
- Security
- **Future avionics equipage**
- Flight time limitations
- Flight crew licencing
- Fatigue Risk management
- Crisis coordination
- Winter operations
- Air safety
- Disruptive passengers
- **Passenger rights**
- Ground handling
- Slot allocation
- Carriage of persons with reduced mobility
- Delivery of new airport capacity in the EU
- EU and national taxes & charges
- **State aid**
- EU noise regulations
- EU emissions trading scheme developments
- Ownership & control rules

Representation

Speaking for our members on industry affairs, safety, operational, maintenance, financial and security issues

Speaking for members

*ERA is **the** recognised body by Europe's regulators*



Speaking for members

Lobbying, representing and defended members on key strategic issues

- Lobbying and advocacy
- Contingency planning
- Security
- Future avionic equipage
- Flight time limitations
- Flight crew licencing
- Fatigue Risk management
- Crisis coordination
- Winter operations
- Air safety
- Disruptive passengers
- Passenger rights
- Ground handling
- Slot allocation
- Carriage of persons with reduced mobility
- Delivery of new airport capacity in the EU
- EU and national taxes & charges
- State aid
- EU noise regulations
- EU emissions trading scheme developments
- Ownership & control rules

Speaking for members

Our specialist groups keep us connected with our members

- Air Safety
- Industry Affairs
- Operations
- Maintenance
- Chief Financial Officers
- Legal





Communications

Telling our members, regulators & politicians what we do, why we do it and why our business is important

Telling you what we do

Telling members what we do on your behalf

Press releases
Members update
Director General's monthly message
Quarterly regulatory digest
Yearbook
Regional International
Social media
Corporate video



Telling the outside world what we do

Raising profile of our business

Press releases
Media features, interviews and articles
Yearbook
Regional International
Social media
Corporate Video



Telling you what we do

Telling members what we do on your behalf

Press releases

Members update

Director General's monthly message

Quarterly regulatory digest

Yearbook

Regional International

Social media

Corporate video



Telling the outside world what we do

Raising profile of our business

Press releases

Media features, interviews and articles

Yearbook

Regional International

Social media

Corporate Video



Communications

Telling our members, regulators & politicians what we do, why we do it and why our business is important

Telling you what we do

Telling members what we do on your behalf

Press releases
Members update
Director General's monthly message
Quarterly regulatory digest
Yearbook
Regional International
Social media
Corporate video



Telling the outside world what we do

Raising profile of our business

Press releases
Media features, interviews and articles
Yearbook
Regional International
Social media
Corporate Video





The future

Europe in transition - A stronger ERA

Europe in transition

Europe is at a turning point with a new European Parliament, a new European Commission & significant change in EASA

A stronger ERA

- Strengthen our membership
- Protect you, our members, from regulation
- Raise the profile of your businesses
- Focus on issues that matter to you
- Provide a B2B interface for you to use
- Make our business safer and more secure
- Look at new opportunities



Europe in transition

Europe is at a turning point with a new European Parliament, a new European Commission & significant change in EASA

A stronger ERA

- Strengthen our membership
- Protect you, our members, from regulation
- Raise the profile of your businesses
- Focus on issues that matter to you
- Provide a B2B interface for you to use
- Make our business safer and more secure
- Look at new opportunities

The future

Europe in transition - A stronger ERA

Europe in transition

Europe is at a turning point with a new European Parliament, a new European Commission & significant change in EASA

A stronger ERA

- Strengthen our membership
- Protect you, our members, from regulation
- Raise the profile of your businesses
- Focus on issues that matter to you
- Provide a B2B interface for you to use
- Make our business safer and more secure
- Look at new opportunities



BARCELONA 2014



Your association in perspective

Simon McNamara
Director General