



3rd Meeting - APAC CAAs

ACI Asia-Pacific The airports perspective

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A *PERMANENT* DIALOGUE DURING THE CRISIS BETWEEN HEALTH AND TRANSPORT AUTHORITIES AT GLOBAL, *REGIONAL* AND NATIONAL LEVEL IS KEY FOR A SAFE RECOVERY OF THE SECTOR

PROPOSAL:

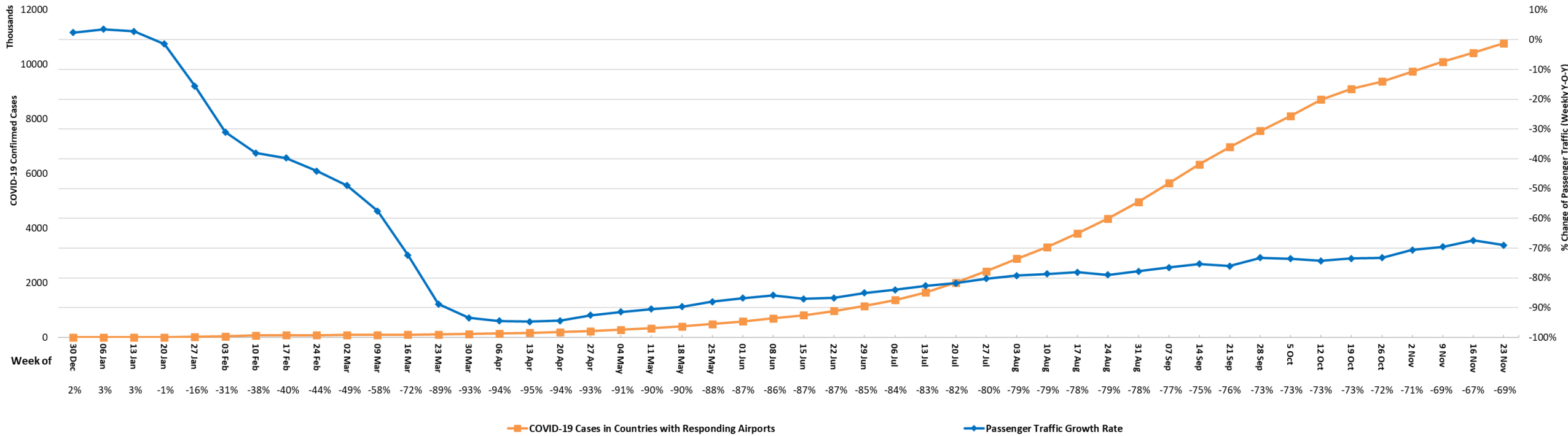
CONTINUE WITH REGULAR ROUNDTABLES CO-CHAIRLED BY ICAO AND WHO ENGAGING STATES' MOH AND MOT/CAA

2020: ACI DOWNGRADED PAX AND REVENUE OUTLOOK

- After being hit first, Asia-Pacific embarked on recovery earlier and faster than other regions and is forecasted to close the year 2020 with a decline of 59.2%, the only region recording a decline below 60%, driven mostly by large domestic markets such as China. However, this represents a loss of more than 2 billion pax lost vs. the pre-COVID-19 forecast.
- As to revenues, in relative terms, Asia-Pacific will report a fall by 59.3% in 2020 (i.e. - USD 29.5 billion) compared to the pre-COVID-19 baseline by ACI World

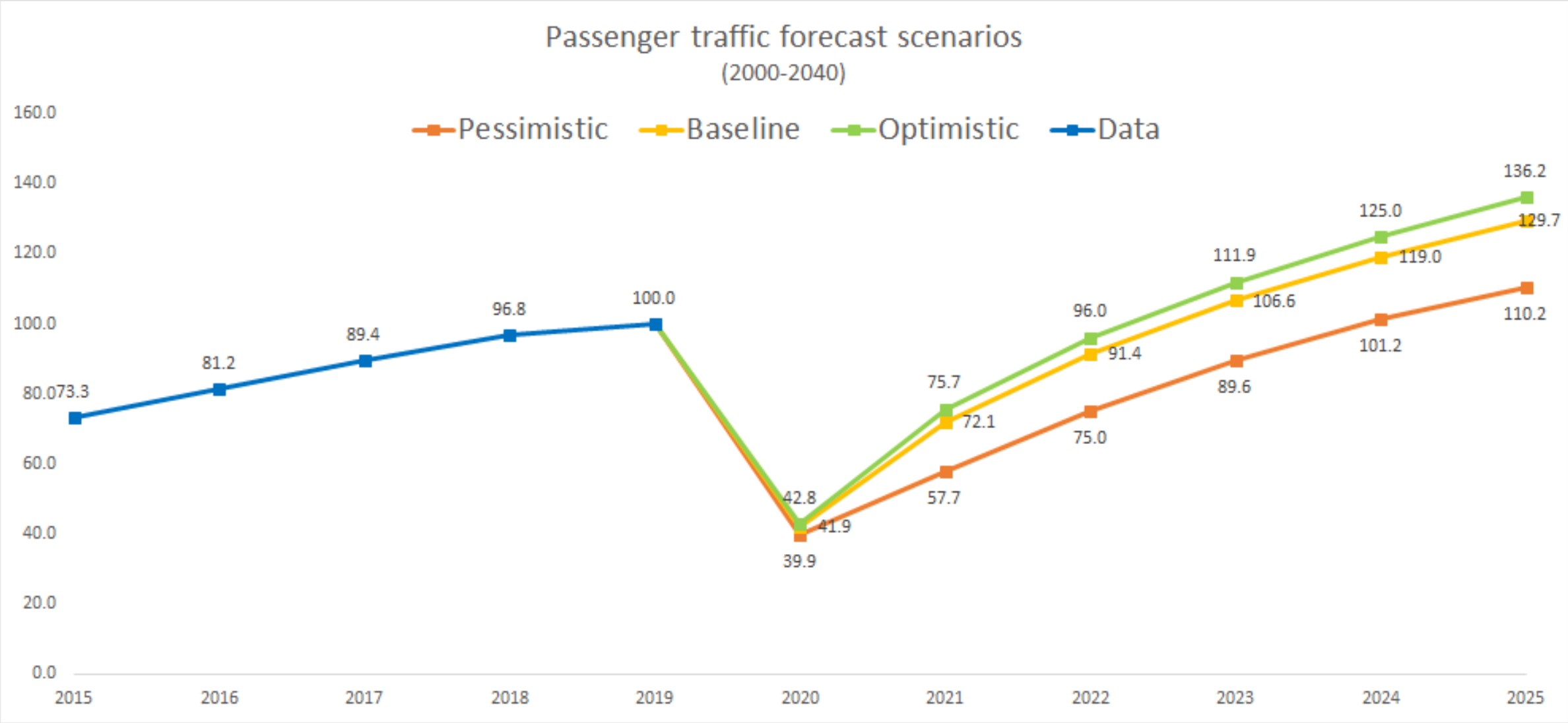
TOTAL AIRPORT PASSENGER TRAFFIC (COVID-19): SELECTED AIRPORTS IN ASIA-PACIFIC AND THE MIDDLE EAST

2020 Week 1 – 48
30 Dec 19 – 29 Nov 20



Source: ACI Asia-Pacific survey of preliminary total passenger traffic data from 31 airports in Asia-Pacific and Middle East (these airports collectively serve around 29% of passenger traffic in the region) (Note: Nov 2020 traffic only include data from 29 airports)

MEDIUM-TERM FORECAST FOR ASIA PACIFIC (PRELIMINARY)



SOURCE: ACI WORLD

Two ACI initiatives to ensure compliance by airports in the Region

2 programmes complementing each other



Both programmes are based on ICAO CART and ACI documents



- **Only ICAO supported programme**
- **Assessment** of the overall management process
- 2 to 3 weeks overall process from application to accreditation
- Accreditation valid for 12 months

- Based on BV's reputed Safeguard Hygiene Excellence and Safety Label – now co branded BV-ACI
- **Onsite audit**
- Measures the effectiveness and application of the health measures
- 6 months certification validity

AHA

	Asia-Pacific + Middle East
Contract signed	62 airports
Accreditation granted	29 airports



23 Asia-Pacific airports accredited so far

ACI Asia-Pacific survey on international passengers

- Objectives to understand:
 - International travel restrictions
 - Quarantine requirement
 - Testing practices
 - Impact of health measures on terminal ops
- 27 responses received
- Survey results: end of Nov 2020

27 respondents – testing for intl. pax and its impact on terminal operations



Quarantine still prevalent

Quarantine for ALL



All countries



Positive/Negative



Quarantine

73%

No quarantine for pax from low-risk countries only



Low risk countries



Negative



Quarantine

8%

No quarantine for ALL



All countries



Negative



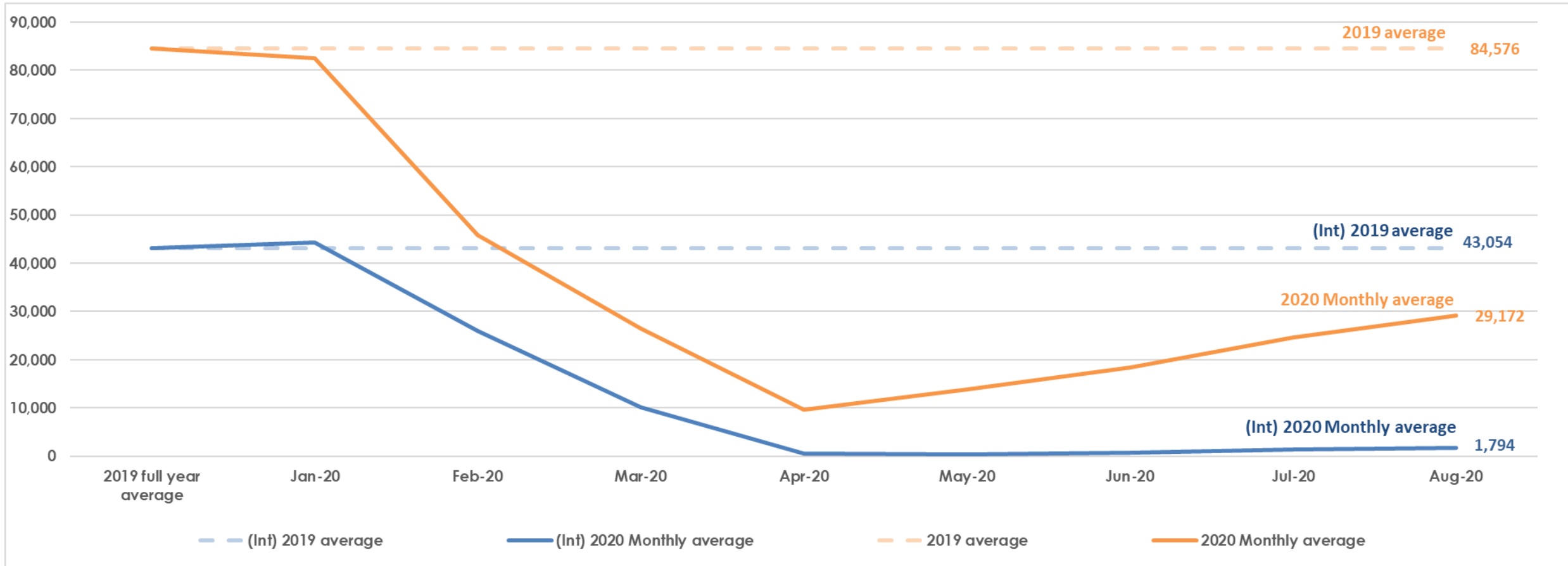
Quarantine

19%



High-level findings	Middle East (7 respondents)	Asia-Pacific (20 respondents)
Testing upon arrival is the common practice	86% Yes, all passengers (57%) Yes, some passengers (29%)	68% Yes, all passengers (42%) Yes, some passengers (26%)
Conducted mostly within the terminal area and before immigration	100% Inside Terminal building	91% Inside terminal building
	67% Before immigration	64% Before immigration
PCR test largely applied	PCR (100%) Antigen + PCR (0%) Antigen (0%)	PCR (73%) Antigen + PCR (18%) Antigen (9%)
Long waiting time but no need to wait at the airport	66% > 10 hours 2-4 hours (17%) 4-6 hours (17%) 6-8 hours (0%)	55% > hours 2-4 hours (36%) 4-6 hours (0%) 6-8 hours (9%)
	83% No need to wait at the airport	64% No need to wait at the airport
Testing capacity up only to a first phase recovery	<1,000 (0%) 1,000-3,000 (17%) 3,000-6,000 (33%) 6,000-9,000 (33%) 9,000-12,000 (0%) >12,000 (17%)	<1,000 (50%) 1,000-3,000 (25%) 3,000-6,000 (0%) 6,000-9,000 (0%) 9,000-12,000 (17%) >12,000 (8%)
Cost borne predominantly by the pax	For free (40%) USD <50 (0%) USD 51-100 (40%) USD 101-150 (0%) USD 151-200 (20%) USD >201 (0%)	For free (30%) USD <50 (10%) USD 51-100 (20%) USD 101-150 (30%) USD 151-200 (0%) USD >201 (10%)
Predeparture testing only still the exception	Arrival testing only (29%) 57% double testing Only pre-departure (14%)	Arrival testing only (6%) 63% double testing Only pre-departure (31%)
	24 hours (0%) 48 hours (40%) 72 hours (20%) 96 hours (20%) 120 hours (20%)	24 hours (7%) 72 hours (66%) 96 hours (7%) 120 hours (7%) 7 days (13%)

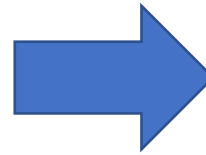
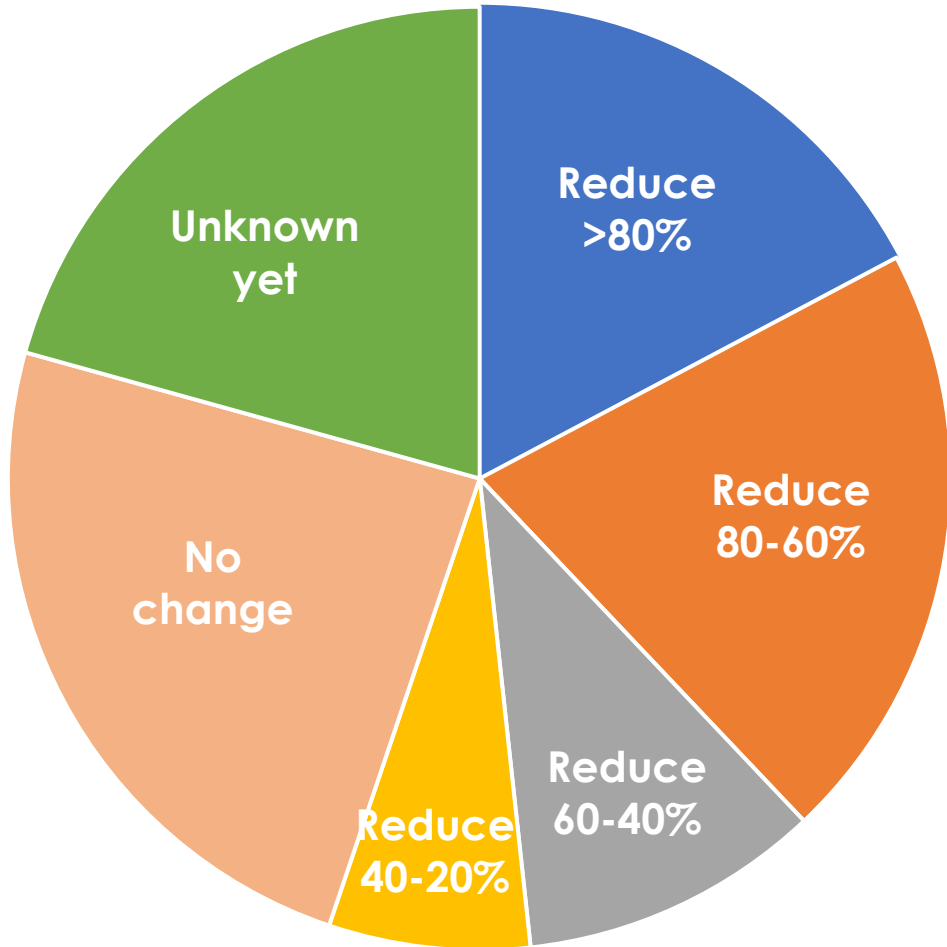
Average daily arrivals of major airports in Asia-Pacific and the Middle East



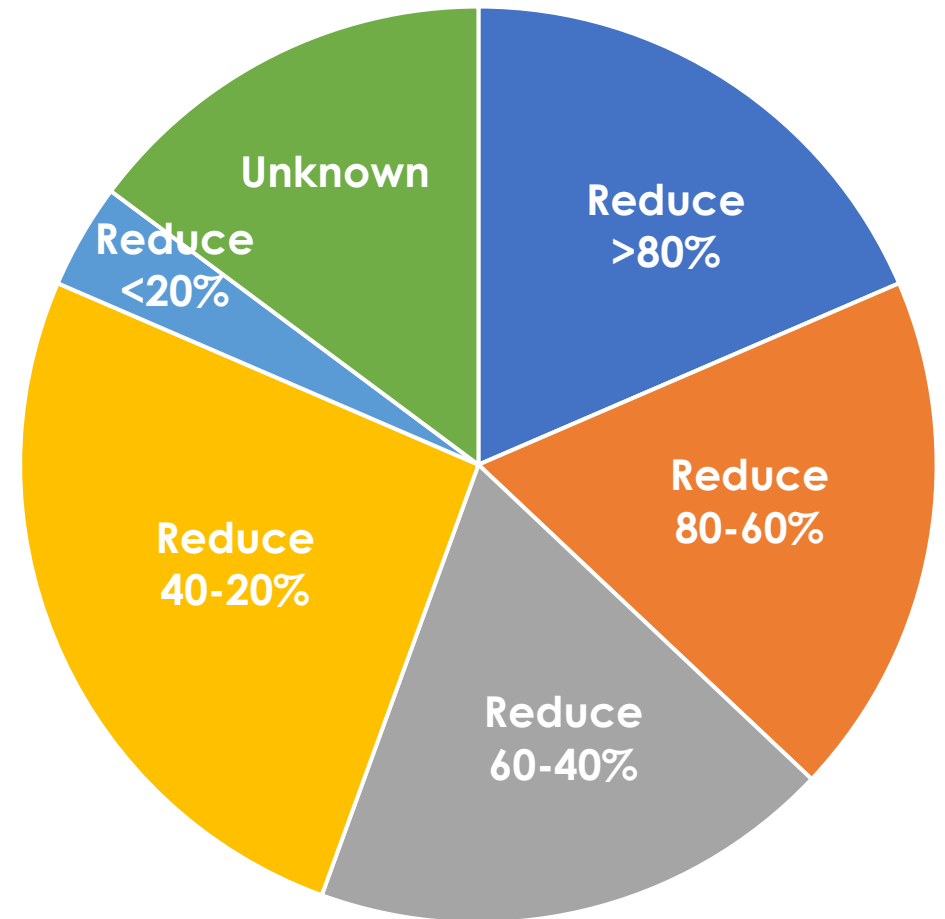
- Data of airports with over 40 million passenger traffic in 2019
- Samples include 21 airports in Asia-Pacific and the Middle East
- Arrival figures derived from total passenger traffic/ international passenger traffic divided 2

Estimated impacts on passenger handling capacity

July 2020



October 2020



Impact on Terminal Operations: Additional Space needed to maintain pre-COVID throughput

DEPARTURES

Check-in



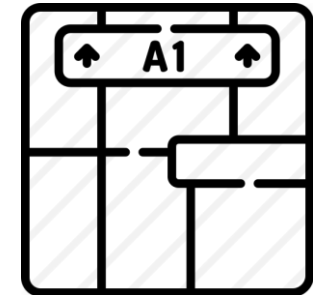
+50% more space

Security



+100% more space

Boarding



+35-50% more space

ARRIVALS

Immigration



+100% more space

Baggage claim



+30-50% more space



ICAO MANUAL ON TESTING



Quarantine may be relaxed (shorter duration) if testing is applied



Quarantine may be relaxed or avoided if testing is applied



Quarantine may be relaxed or avoided if testing is applied

In most instances, for tested passengers systematic quarantine is not justified for connections with countries with equivalent or lower risk similarly to what is applied to the population of the arriving country



COVID-19 vaccine distribution – logistical challenges

- AIRPORTS WILL PLAY A CENTRAL ROLE ACTING AS GATEWAYS FOR THE INCOMING AND OUTGOING SHIPMENTS OF VACCINES AND EQUIPMENT (OFTEN FACILITATOR AND COORDINATOR OF LOGISTICAL PROCESS TAKING PLACE IN ITS PREMISES)

OPERATIONAL CHALLENGES:

- SUDDEN INCREASES IN AIRCRAFT TRAFFIC FLOWS FOR AIRPORTS CLOSE TO PRODUCTION FACILITIES OR AIRPORTS THAT WILL BE DESIGNATED AS MAIN DISTRIBUTION HUBS → AIRPORT OPERATORS SHOULD ENSURE COORDINATION WITH THE SLOT COORDINATOR TO FACILITATE THE ALLOCATION OF AD-HOC SLOTS AND MAY ALSO WANT TO CONSIDER ANY IMPACTS ON INCREASES IN NIGHT FLIGHTS AND POTENTIAL IMPACTS ON LOCAL COMMUNITIES
- SOME AIRPORTS AT THE RECEIVING END OF THE FLIGHTS OUT OF THE HUBS, WILL HAVE TO EQUIP FOR MAINTAINING THE COLD CHAIN AT ALL TIMES

SAFETY CHALLENGES:

- USE OF LARGE VOLUMES OF DRY ICE IS NEEDED TO SUSTAIN THESE LOW TEMPERATURES AND MAY GENERATE RISKS IF NOT ADEQUATELY HANDLED IN THE CARGO LOGISTICS PROCESS. DRY ICE IS CONSIDERED TO BE A “DANGEROUS GOOD” → ICAO DOC 8294 UNDER REVISION; AIRPORT RESCUE AND FIRE FIGHTING (ARFF) RESPONSE MAY NEED TO BE ADAPTED
- SAFETY RISK ASSESSMENT OF THE OVERALL CHANGES AND IMPACTS SO AS TO IDENTIFY HAZARDS AND IMPLEMENT MITIGATION MEASURES.

SECURITY CHALLENGES:

- THE SENSITIVE NATURE OF THE VACCINES, THE HIGH LEVEL OF DEMAND THERE WILL BE FOR OBTAINING THEM AND THE INITIAL SHORT SUPPLY HAS THE POTENTIAL TO GENERATE SOME ATTENTION BY PERSONS OR GROUPS WITH MALICIOUS INTENT. CONSIDERATION SHOULD BE GIVEN TO INCREASED PROTECTION OF THESE GOODS AND/OR THE FACILITIES THAT WILL HOUSE THEM. IN MANY CASES, THIS WILL REQUIRE COORDINATION WITH LOCAL SECURITY AUTHORITIES.
- AIRPORTS THAT WILL BE AFFECTED BY VACCINE DISTRIBUTION OPERATIONS SHOULD CONDUCT A RISK AND THREAT ASSESSMENT