



AIRPORTS COUNCIL
INTERNATIONAL

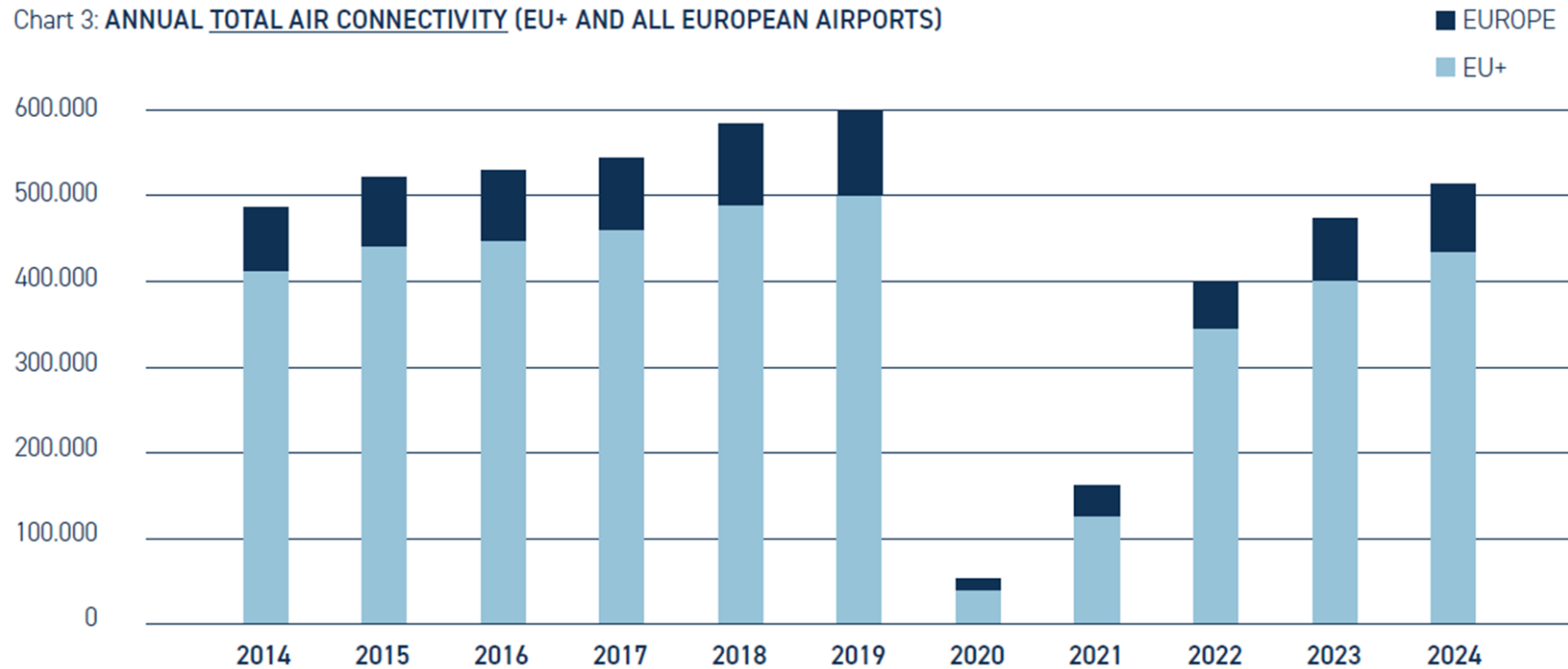
Morgan Foulkes ACI EUROPE

**Session 2: Connectivity, liberalisation and fair
competition**

ECAC/42, Strasbourg, 9 –10 July 2024

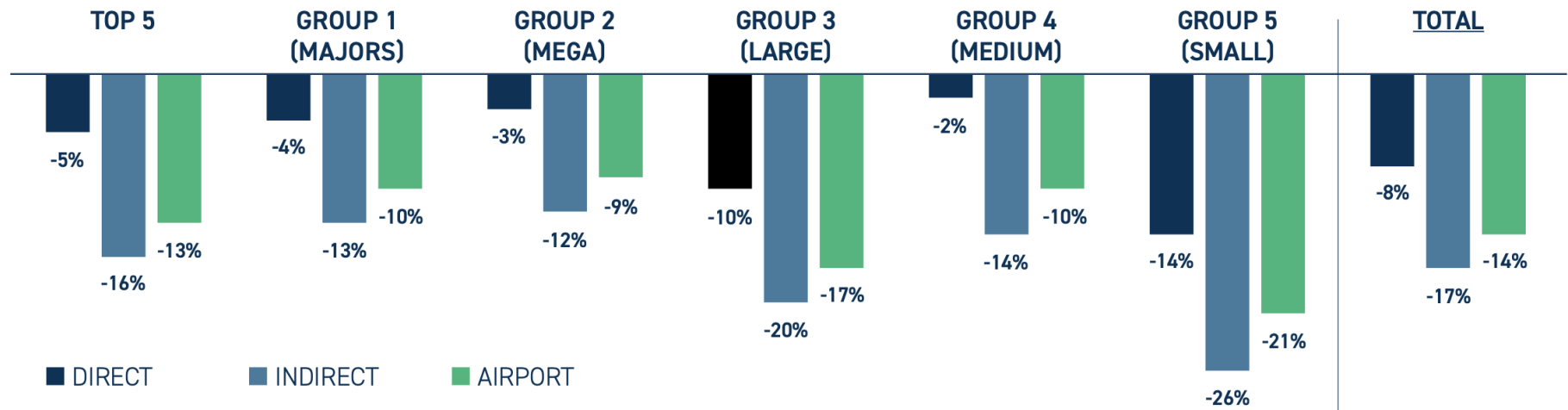
TOTAL AIR CONNECTIVITY - Ten year perspective

Chart 3: **ANNUAL TOTAL AIR CONNECTIVITY** (EU+ AND ALL EUROPEAN AIRPORTS)



DIRECT, INDIRECT & AIRPORT CONNECTIVITY - by airport groups

Chart 7: DIRECT, INDIRECT & AIRPORT CONNECTIVITY
(EUROPEAN AIRPORTS BY TRAFFIC CATEGORIES – JUNE 2024 VS. JUNE 2019)



Shifting sands, Asia Pacific not yet picking up, while Africa and North America strong

Chart 9: DIRECT CONNECTIVITY FROM EUROPEAN AIRPORTS – INTRA-EUROPE

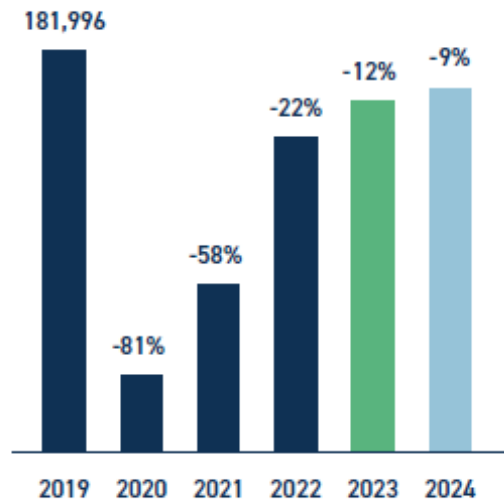
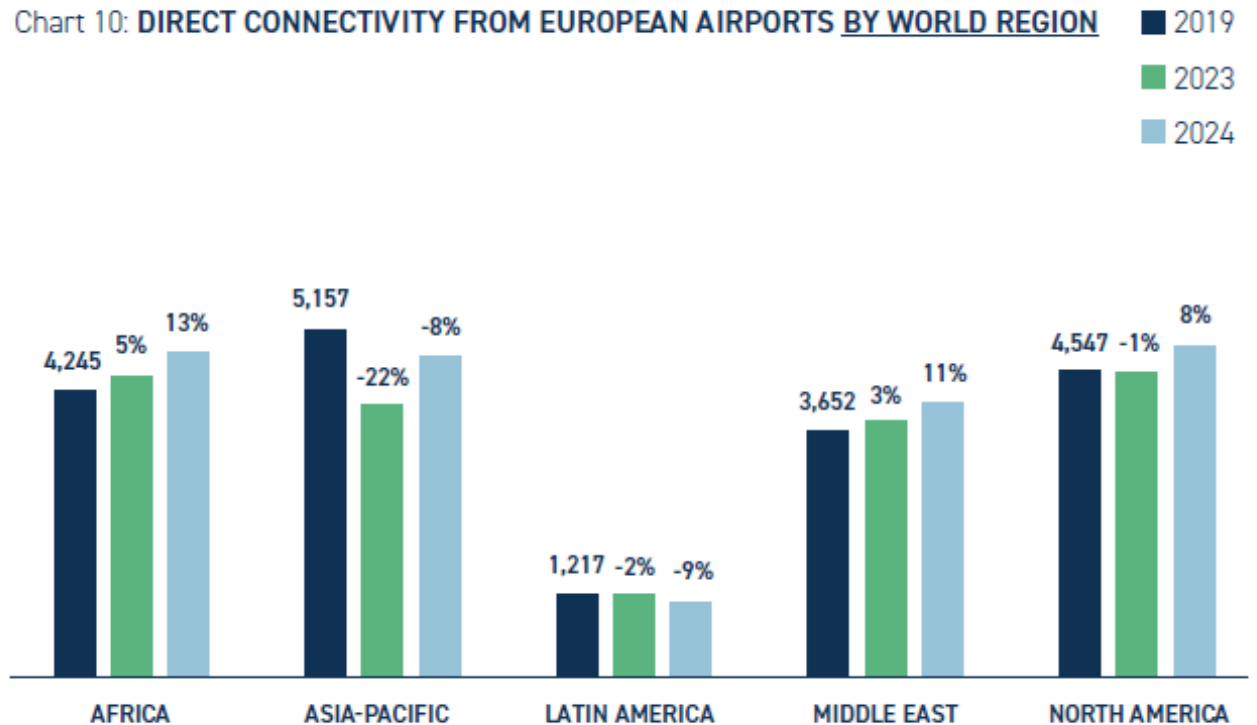
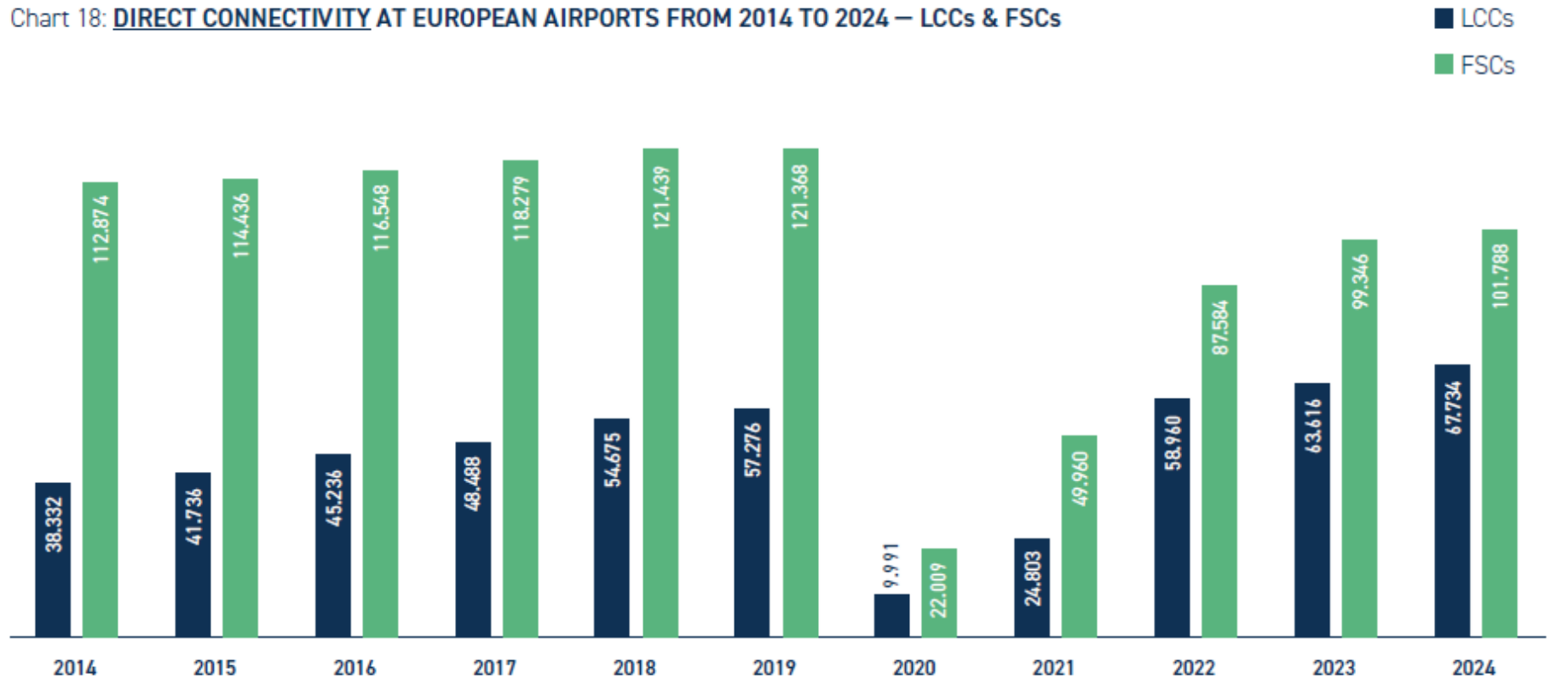


Chart 10: DIRECT CONNECTIVITY FROM EUROPEAN AIRPORTS BY WORLD REGION



Growth is driven by footloose, flexible LCCs and LCC-brands of network (legacy) carriers – showing a competitive airport market

Chart 18: DIRECT CONNECTIVITY AT EUROPEAN AIRPORTS FROM 2014 TO 2024 – LCCs & FSCs



Liberalisation & Fair competition

- Increasing the number of destinations & diversifying their airline portfolio is a core business imperative for airports & key to their societal benefits
- Fair competition vs. Level playing field
- Role of airports in international aviation negotiations
- Ambitious & robust EU external aviation policy with main trading partners
- Relaxing foreign ownership & control rules is required to avoid potential of unfair competition, maximise connectivity and maintain balance across the air transport network.

Advanced Air Mobility & Connectivity

- AAM offers considerable new possibilities for connectivity:
 - Airport – city connections (adding to existing train/bus/car etc.).
 - Airport – regional connections (linking underserved towns directly to the global aviation network).
 - Short regional flights.
- Requires:
 - Capacity – in the ground and in the air.
 - Infrastructure – vertiports, electrical charging.
 - Enabling regulation – do not force the industry into a specific business model through safety/security/planning regulations.

Thank you

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