

ASIA-PACIFIC & MIDDLE EAST AIRPORTS

THE OFFICIAL MAGAZINE OF ACI ASIA-PACIFIC & MIDDLE EAST



IN THE SPOTLIGHT: SUSTAINABILITY

Issue 3, 2024

- Airport profile: Mactan Cebu
- Special Report: Western Sydney Airport
- Plus: Airport Art, Customer Service & Regional News



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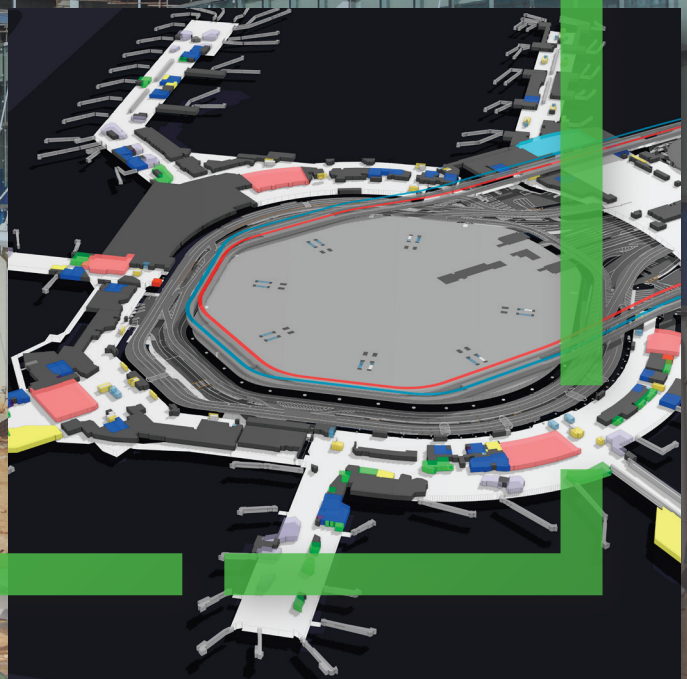
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ACI Asia-Pacific & Middle East (ACI APAC & MID) serves as the voice of 126 airport members, operating 624 airports across 46 countries/territories in Asia-Pacific and Middle East. ACI Asia-Pacific & Middle East is head-quartered in Hong Kong and has a Middle East office in Riyadh (Kingdom of Saudi Arabia). ACI Asia-Pacific & Middle East represents the collective interests of airport members to promote professional excellence in airport management and operations. ACI Asia-Pacific & Middle East's mission is to advocate for policies and provide services that strengthen its members' ability to serve their passengers, employees and stakeholders.

ACI Asia-Pacific & Middle East key facts:



126
AIRPORT MEMBERS



5
AFFILIATE AIRPORT MEMBERS



624
OPERATED AIRPORTS



9
ASSOCIATE MEMBERS



46
COUNTRIES/ TERRITORIES



104
BUSINESS PARTNERS

In 2023, ACI Asia-Pacific & Middle East airports handled 3.43 billion passengers and 51 million tonnes of cargo.



51
MILLION TONNES OF CARGO



3.43
BILLION PASSENGERS



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VIEW FROM THE TOP

Director general, Stefano Baronci, reflects on the advocacy efforts of ACI Asia-Pacific & Middle East to raise awareness of the social and economic importance of the region’s airports and the huge infrastructure challenges ahead.

While we may think about bustling terminals filled with people heading to far-off places, the significance of these hubs extends far beyond that. Airports attract a variety of businesses and, in doing so, generate a multitude of job opportunities for local communities.

Looking forward, the Asia-Pacific region is poised for extraordinary growth, with forecasts predicting 8.7 billion passengers by 2042, while Middle East is estimated to reach one billion passengers in two decades.

This swelling demand establishes an urgent need for airport infrastructure, necessitating an investment of around \$1.3 trillion in capital expenditure in Asia-Pacific and \$151 billion in the Middle East over 20 years.

With the top ten fastest-growing aviation markets from these regions, addressing infrastructure needs is vital to avoid inefficiencies and ensure sustainable growth. Failure to address infrastructure needs could have significant socio-economic consequences, potentially leading to inefficiencies and stunted growth.

To emphasise the urgency of these infrastructure needs and advocate for sustainable growth, we engaged media to drive home the point that airports are critical to economic growth at all levels.

We continue to advocate for investment in airport infrastructure to accommodate this surge in air passenger traffic, dispelling the misconception that airport charges directly impact airfares.

Indeed, we reiterated our message at the recent ICAO Asia-Pacific Ministerial Conference, where we highlighted the need for infrastructure development in the presence of regulators and ministers from the APAC region.

We also made a strong case for enhancing aerodrome safety through APEX reviews, the adoption of One-Stop Security measures, and the implementation of Airport Collaborative Decision Making (A-CDM) for operational efficiency.

Our advocacy extended to the 9th Beijing Global Friend Airport CEO Forum, where we highlighted the industry’s need to address connectivity, climate change, and infrastructure development as critical components of aviation’s transformation.

SUSTAINABILITY AND SECURITY AT THE FOREFRONT

The aviation industry’s challenge today lies in balancing rapid growth with a strong commitment to environmental sustainability.



As air travel expands in regions like Asia-Pacific and the Middle East, adopting greener practices has become essential. At ACI APAC & MID, we are driving efforts to reduce the environmental impact of airports through innovative collaborations.

At the ACI APAC & MID Regional Environment Committee in Bangkok, we discussed the benefits of partnering with airlines to adopt more sustainable practices, ranging from cabin waste management to the use of Sustainable Aviation Fuel (SAF) and renewable energy.

We also approved a climate adaptation study, preparing airports for the inevitable impacts of climate change, while promoting eco-friendly firefighting foams as a significant step towards reducing environmental contamination.

However, these efforts extend far beyond committee meetings. At the ICAO 8th Meeting of the Aerodromes Operations and Planning Sub-Group (AOP/SG/8), held in Bangkok, and at a Sustainable Aviation webinar hosted in collaboration with the Singapore Aviation Academy and the Civil Aviation Authority of Singapore, ACI APAC & MID reaffirmed its commitment to driving sustainability in aviation.

These events have created platforms for industry experts to share data-driven insights, helping airports implement meaningful changes in their operations. Through webinars and workshops, ACI APAC & MID is fostering an industry-wide dialogue on sustainability, driving the adoption of eco-friendly technologies and practices.

The challenges are significant, but the commitment to change is growing stronger every day, pushing the aviation industry toward a greener, more sustainable path forward.

GREATER EMPHASIS ON SECURITY

Security is another key priority as airports face challenges ranging from manpower shortages to emerging threats.

At the recent ICN Global Aviation Security Seminar in Incheon, Republic of Korea, we addressed the urgent need for addressing manpower shortages, evolving security threats, and the adoption of smart security technologies to enhance airport safety.

As airports confront these challenges, the need for innovative security solutions has become more urgent than ever. ACI APAC & MID also highlighted the importance of security-by-design – a concept that ensures security measures are integrated into the planning and design of new airport infrastructure for long-term resilience and safety.

MONKEY POX THREAT

In the wake of emerging threat from Monkey Pox, a survey was conducted amongst our members to assess the preparedness of the industry.

The survey revealed that many airports have already taken steps to enhance safety protocols. These measures include increased cleaning, passenger communications, temperature checks, and health declarations upon arrival.

However, challenges persist, particularly around the co-ordination with stakeholders and the timely sharing of information.

RECOGNISING EXCELLENCE IN AVIATION

At ACI APAC & MID, we believe in recognising the commitment of airport operators that strive towards building and enhancing their safety culture. That's why we're excited to introduce the ACI APAC & MID Safety Recognition Award 2025, a chance to spotlight the airports that are leading the way in aerodrome safety. By sharing best practices, we can continue to raise the bar and ensure a safer future for all.

We are also thrilled to open applications for the ACI APAC & MID Young Executive Award 2025. This year's theme, 'How Artificial Intelligence will Transform Airports and Customer Experience', gives young professionals the platform to showcase their creativity and fresh perspectives.

These awards reflect our commitment to celebrating safety, innovation, and the bright minds driving change in aviation. We encourage our airport members to embrace the awards and show the world your examples of excellence in terms of airfield safety and using AI to enhance the customer experience.

INDUSTRY NEWS

We provide a snapshot of some of the latest news stories from across Asia-Pacific and the Middle East.



CONSTRUCTION OF CHANGI'S TERMINAL 5 TO START NEXT YEAR

The construction of Changi Airport's highly anticipated Terminal 5 will start in the first half of 2025, according to Singapore's Prime Minister and Minister of Finance, Lawrence Wong.

Wong, who made the announcement during the 40th anniversary celebrations of the Aviation Authority of Singapore (CAAS), said the timescale means that the new terminal will be operational by the mid-2030s.

Wong said: "IATA projects that post-COVID, air passenger volumes will double by 2040. And Asia-Pacific, our region, will be a key engine of this increase.

"Countries in our region and beyond are making significant investments to expand and improve their airport infrastructure, to capture more of this traffic. Some have announced plans for mega airports that can handle more than 100 million passengers a year. So, they are narrowing the gap with Singapore.

"Many airlines are also rapidly expanding their fleets and networks, including to serve more direct routes. Increasingly, flights that would have passed through Changi may no longer be needed. So, we must continue to sharpen our competitive edge and develop new advantages to set us apart.

"We are already doing a few things for the next leg of our aviation journey. The most important thing we are doing is to invest in Terminal 5.

"We will break ground for the construction of T5 in the first half of next year.

"It will add capacity for another 50 million passengers each year, on top of Changi's current capacity of

90 million. So, it will support more connectivity, transform the passenger experience, and create more jobs.

"Besides additional capacity, the government is also working closely with our international partners to further liberalise our air services agreements, so that airlines can mount more flights, and expand Changi's network.

"We are already well connected, with almost 150 city links today. But we aim to grow this further, to over 200 links in the mid-2030s."

GMR TO ACQUIRE FRAPORT'S STAKE IN DELHI AIRPORT OPERATOR

Global airport operator Fraport AG is selling its 10% stake in Delhi's Indira's Gandhi International Airport (DEL).

Under the agreement signed on September 9, Fraport is selling its entire stake in DEL operator, Delhi International Airport Limited (DIAL), to its majority owner, GMR Airports Infrastructure Limited (GIL), for \$126 million.

Fraport CEO, Dr Stefan Schulte, said: "After a successful 18-year partnership driving impressive growth in Delhi, it's time to start a new chapter.

"We look back with pride on the various milestones we've achieved together with GIL. We jointly upgraded and expanded Delhi Airport into one of Asia's leading air transportation hubs."

When the deal is formally ratified, GMR Airports Infra will have a 74% stake in DIAL with the remaining 26% held by the Airports Authority of India (AAI).



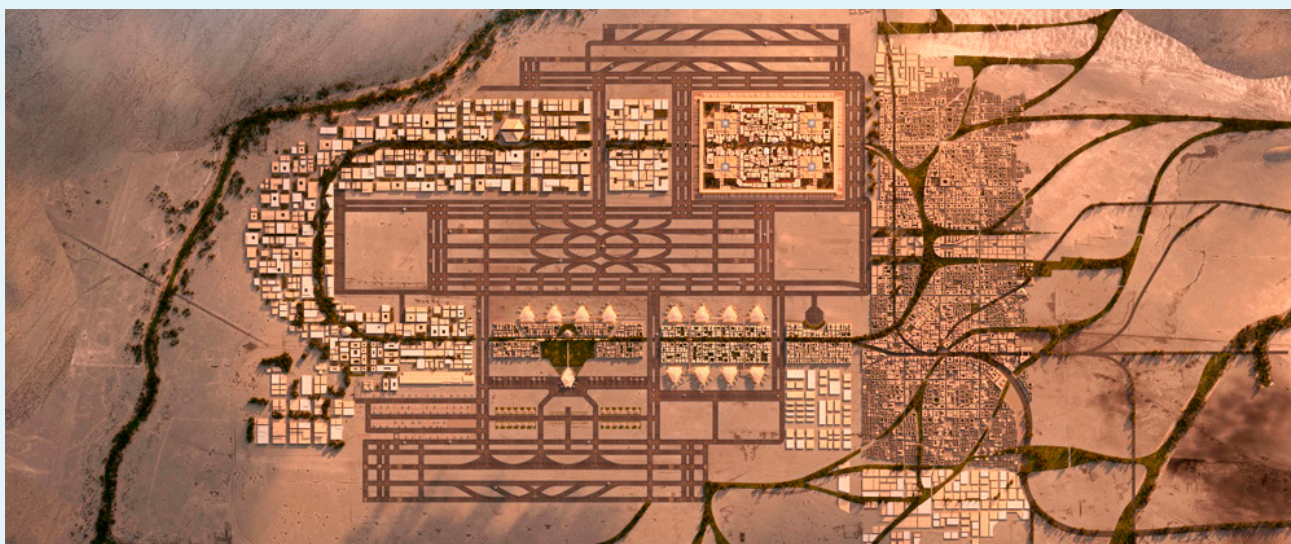
BUSIEST EVER MONTH AT HAMAD INTERNATIONAL AIRPORT

Building on the dynamic growth experienced in the first half of the year, Hamad International Airport (DOH) has revealed that 4.73 million passengers passed through its facilities in July, making it the busiest month in its history.

The Qatari hub attributes the surge in passenger numbers to its growing network and increased

frequencies to existing destinations to cater to the heightened demand to travel during the traditionally busy summer months.

The top destinations in July were London, Bangkok, Dubai, Riyadh and Jeddah; whereas the top countries for travel to were India, USA, UK, Saudi Arabia and the UAE.



NEW DELIVERY PARTNER FOR RIYADH'S KING SALMAN INTERNATIONAL AIRPORT

King Salman International Airport Development Company (KSIADC) has appointed Mace to oversee the planning and construction for its airport development programme in Riyadh, Saudi Arabia.

Saudi Public Investment Fund (PIF) owned KSIADC expects Mace to provide the full range of delivery partner services for the six-runway airport.

The major new aviation hub is set to be ready in time for Riyadh Expo 2030 and the FIFA World Cup in 2034 and is expected to play key role in Saudi Arabia's economic diversification under Vision 2030.

Davendra Dabasia, CEO of Mace Consult, said: "King Salman International Airport is a game-changing infrastructure programme. The scale of ambition for the programme's physical build, as well as its commitment to sustainability, innovation and economic development, is unmatched.

"Our consultancy experience developing some of the world's most famous infrastructure projects, construction expertise and rich heritage in the aviation sector means we are perfectly placed to deploy our full service offering and help KSIADC successfully deliver one of the largest airports in the world."



BRISBANE AIRPORT UNVEILS BOLD PLANS FOR TERMINAL 5

Brisbane Airport (BNE) believes that the revamp of its Terminal 5 will revolutionise the passenger experience at the gateway.

The upgrade is part of the Australia airport's A\$5 billion Future BNE transformation plan and will include the most significant changes to the terminal since it opened 29 years ago.

Driven by the need to upgrade security screening equipment to meet Australian government standards by the end of 2025, Brisbane Airport is undertaking major works across the terminal.

"Our International Terminal is Queensland's gateway to the world. After three decades of service, it's well and truly time for a transformation, ensuring it's ready to welcome the world for years to come," enthuses airport CEO, Gert-Jan de Graaff. "This building is worth billions of dollars to Queensland's tourism economy and jobs every year."

In addition to the T5 revamp, Future BNE will deliver upgrades to the Domestic Terminal, construction of Terminal 3, and extensive commercial, retail, and industrial projects across the precinct over the next decade.

The upgrade of Terminal 5 will see security screening switch floors to Level 4, providing passengers with a brighter, naturally-lit space and the installation of next generation Computed Tomography (CT) security screening equipment supplied by Rapiscan Systems.

Amadeus will provide its advanced self-service technology check-in and bag drop kiosks in the upgraded International Terminal, which will also undergo a retail/F&B transformation to house 31 new outlets and a bigger duty free area operated by Lotte Duty Free.

The enhancement of T5 will also extend outside to the apron where new charging infrastructure will be introduced to support ground support equipment (GSE) such as pushback tugs, belt loaders, cargo loaders, and baggage tugs.

"Not only will this convert vehicles from fossil fuels to sustainable sources, but it will also make the apron a quieter workplace for the hundreds of people who work loading and dispatching aircraft every day, as well as passengers," adds de Graaff.

VIETNAM EXPANSION FOR ADANI GROUP?

India's Adani Group is considering investing in two airports in Vietnam, according to a Reuters report.

The news agency is reporting that the Vietnamese government is open to them bidding for the concessions to operate and develop the currently under construction Long Thanh International Airport and existing Chu Lai Airport in Vietnam's south and central regions respectively.

The news follows Adani's recent disclosure of its authorisation to build a seaport in the country.

Reuters quotes the government as stating: "Adani is planning to strengthen co-operation with Vietnamese partners in the fields of aviation and logistics, via the construction of Long Thanh and Chu Lai airports."

The statement did not mention the time frame of the investment or the amount of money involved.

Last year, Karan Adani, the elder son of Gautam Adani, announced a plan to invest up to \$3 billion in seaport and renewable energy projects in Vietnam.

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REGIONAL UPDATE

ACI Asia-Pacific & Middle East’s manager for communications and brand marketing, Yuman Lau, provides a comprehensive round-up of the latest developments and insights from the airport industry.



FIRST-EVER ACI APEX REVIEW IN MALAYSIA FOR SECURITY ENHANCEMENT

Kota Kinabalu International Airport (KKIA) has successfully undergone an ACI Airport Excellence (APEX) in Security review.

With the support of Malaysia Airports Holdings Berhad (MAHB), it was the first ever APEX review conducted in the

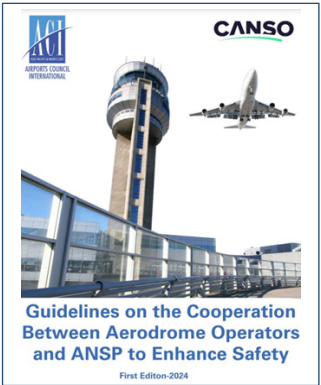
south east Asian country. Gary Leung, ACI Asia-Pacific & Middle East’s senior manager for security and facilitation was part of the review team, which shared insights and offered recommendations to help Malaysia’s second busiest airport enhance security compliance and efficiency.

NEW SAFETY GUIDELINES

One of our publications is the newly published ‘Guidelines on the Cooperation Between Aerodrome Operators and ANSP to Enhance Safety’.

The document is the first jointly published by ACI Asia-Pacific & Middle East and CANSO as a result of the agreement that the two associations reached at their first in-person meeting held in May 2023 in Kobe, Japan.

It features a number of projects to have taken place at airports across our region that include Hong Kong, Kansai, Mactan-Cebu and Queenstown. The publication is available for members only. Access full publication <https://www.aci-asiapac.aero/media-centre/library>



REGIONAL OPERATIONAL SAFETY COMMITTEE MEETS IN DUBAI

The ACI Asia-Pacific & Middle East Regional Operational Safety Committee met in Dubai in October, reinforcing its commitment to advancing aviation safety across the region.

The committee reaffirmed that the use of alphanumeric call signs is a proven way of reducing the risk of miscommunication amongst pilots, ATC and airports.

The committee strongly encouraged airports across the region to collaborate with key stakeholders to ensure its smooth implementation and adoption.

As part of our commitment mission to build a more resilient safety framework at airports, ACI Asia-Pacific & Middle East will undertake a safety culture survey to gather insights from airports and identify opportunities for improvement.

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Stefano Baronci
Director-General, ACI, APAC & ME
NEWS

MEDIA ENGAGEMENT

ACI APAC & MID director general, Stefano Baronci, emphasised the importance of airports as vital economic engines for not only the regions and countries they serve but the entire world, driving both economic growth and job creation, during meetings with local and global media outlets during a recent visit to Singapore.

He also took the opportunity to underscore the growing infrastructure demands in the Asia-Pacific region, which is on track to dominate global air passenger traffic, with projections reaching 8.7 billion passengers by 2042.

Nine of the ten fastest-growing markets are in the Asia-Pacific region, and this presents substantial opportunities for APAC. Importantly, it was an opportunity to clear the misconception that an increase in airport charges inevitably resulted in rising airfares, as there is no direct correlation between the two.

REGISTER NOW FOR THE TRINITY FORUM

Co-organised by The Moodie Davitt Report, ACI Asia-Pacific & Middle East and ACI World, and jointly hosted by Airports Corporation of Vietnam (ACV) and Imex Pan Pacific Group (IPPG), The Trinity Forum 2024 will be held on November 5-6, in Ho Chi Minh City, Vietnam.



The Trinity Forum is the world's leading airport commercial revenue conference. The event brings together the world's airports, brands, and concessionaires, alongside their business partners in the travel retail sector for provocative and stimulating conversations.

Register now. Special offer entitled to ACI members. More details: [The Trinity Forum 2024 | EventX](https://eventxapp.com/events/9f439b7e-0067-48c2-9a28-d1c1ea8e4fb4?regForm=4c6f6c1b-e673-4c5b-a5e1-9421c4effd1d)
Website: <https://eventxapp.com/events/9f439b7e-0067-48c2-9a28-d1c1ea8e4fb4?regForm=4c6f6c1b-e673-4c5b-a5e1-9421c4effd1d>



ICAO APAC MINISTERIAL CONFERENCE

At the International Civil Aviation Organisation 2nd Asia-Pacific Ministerial Conference in New Delhi, ACI APAC & MID delivered a strong statement about the critical importance of aerodrome safety and what ACI is doing to help airports achieve their safety goals.

These include APEX reviews, the implementation of One-Stop Security and A-CDM for operational

efficiency. We also highlighted the urgent need for innovation and the development of new airport infrastructure to ensure that airports are more resilient going forward and equipped to meet future demand.

We believe that all are key as we work towards a safer, more secure, and future-ready aviation sector.



COLLABORATION WITH AIRLINES ON SUSTAINABLE PRACTICES

Key outcomes of the 19th Meeting of the ACI Asia-Pacific & Middle East Regional Environment Committee (REC), which took place in Bangkok in September, include the commitment to continued collaboration with airlines in areas such as cabin waste management, Sustainable Aviation Fuel (SAF), and renewable energy for aircraft.

The committee also approved the work plan and progress of the climate adaptation study for the APAC & MID regions and emphasised the importance of sharing best practices in firefighting foam usage and avoiding greenwashing claims.

AIRPORT INDUSTRY OUTLOOK Q1 2024

This latest edition of Airport Industry Outlook presents a positive trend in traffic recovery trend in the Q1 2024. The Outlook also has a special focus on Saudi Arabia's

Aviation Vision 2030. The report is available for members only. Access full publication: <https://www.aci-asiapac.aero/media-centre/library>

ONLINE SURVEY ON MPOX

ACI APAC & MID conducted a survey with airports about the measures implemented to contain MPOX.

In preparation for the potential spread of MPOX, many airports have enhanced their safety measures, including increased cleaning protocols, passenger communications, temperature checks, and mandatory health declarations for arrivals.

However, several challenges persist, including the need for better co-ordination with stakeholders, timely information sharing, and budget constraints. The establishment of onsite testing facilities for MPOX is also crucial, as currently, only a limited number of airports are equipped with such facilities.



ADVOCATING FOR DEVELOPMENT OF ADVANCED AIR MOBILITY

ACI Asia-Pacific & Middle East shared its position on AAM at the 12th International Smart Airport Development Forum 2024 in Shanghai, China, this summer.

Representing ACI APAC & MID, our senior manager for economics, Philip Kwok, spoke about the enormous opportunities for airports to integrate AAM into their master plans and business models.

In addition, he told delegates more about China's active and progressive steps taken to develop its low-altitude economy and how it is a fine example for many markets to reference.

ACI APAC & MID continues to lead the way in advocating for AAM and supporting the growth of the low-altitude economy across Asia-Pacific and Middle East by engaging in dialogue with airports, regulators, industry associations and institutions.



SECURITY CHALLENGES AND PRIORITIES FOR AIRPORTS

ACI Asia-Pacific & Middle East highlighted the need to address common security challenges and priorities at the ICN Global Aviation Security Seminar in Incheon, Republic of Korea.

Representing ACI Asia-Pacific & Middle East, Gary Leung, senior manager for security, addressed the pressing issues such as manpower shortages, emerging

security threats, and the implementation of smart security technologies at airports.

The seminar, hosted by Incheon International Airport Corporation (IIAC), saw participation from over 150 aviation security experts and officials, including key representatives from local government agencies, academic institutions, and airlines.

ACI APEX REVIEW FOR SECURITY ENHANCEMENT IN MANADO, INDONESIA

An Airport Excellence Programme (APEX) in Security review was successfully conducted at Sam Ratulangi International Airport (MDC) in Manado, Indonesia, in September.

Hosted by Indonesian airport operator, PT Angkasa Pura I, the review aimed to enhance airport security at the airport by assessing current practices and compliance with global standards.

The review team comprised security experts from Incheon Airport in South Korea, Queen Alia International Airport in Amman, Jordan, Edinburgh Airport in the UK, Changi Airport in Singapore, Velana International Airport in the Maldives, and Hong Kong International Airport.

We are pleased to report that their expertise contributed to a comprehensive evaluation of security measures at Sam Ratulangi International Airport.



EMPHASIS ON SECURITY-BY-DESIGN FOR AIRPORTS

ACI Asia-Pacific & Middle East delivered a presentation at the 12th ICAO Asia & Pacific Regional Aviation Security Coordination Forum (RASCFC-APAC/12) that stressed the importance of the concept of security-by-design, which refers to the integration of security considerations into the design and development phase of new airport infrastructure.

It is important to note that new infrastructure applies to the modernisation and refurbishment of existing facilities and not just new terminals, concourses and other buildings. Over 80 aviation security experts from state regulators and industry associations across Asia-Pacific attended the ICAO annual regional security forum, which was held in Manila, in the Philippines.

SAVE THE DATE FOR OUR 2025 REGIONAL CONFERENCE



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REGIONAL ASSEMBLY, CONFERENCE AND EXHIBITION

15 - 17 April 2025

We are thrilled to announce that our next ACI Asia-Pacific & Middle East Regional Assembly, Conference and Exhibition will take place in New Delhi, India, on April 15-17, 2025.

Hosted by Delhi's Indira Gandhi International Airport, the event would be a great opportunity for you to meet the global aviation leaders, experts, and stakeholders.

Save the date for our flagship event in 2025, and stay tuned for more details.

AVIATION ENVIRONMENTAL SUSTAINABILITY

ACI Asia-Pacific & Middle East (ACI APAC & MID) once again reaffirmed its commitment to promoting aviation environmental sustainability during a Sustainable Aviation webinar, jointly organised by ACI, Singapore Aviation Academy (SAA) and Civil Aviation Authority of Singapore (CAAS).

Ken Lau, our head of sustainability, highlighted the Regional Environment Committee's dedication to advancing sustainability priorities through data-driven analysis and member airport surveys.

He also discussed key programmes such as Green Airports Recognition and Airport Carbon Accreditation, and touched on a number of potential future initiatives that could help airports develop net-zero roadmaps and climate resilience planning.

DRIVING THE ADOPTION OF ECO-FRIENDLY FIREFIGHTING FOAMS

A recent webinar hosted by ACI Asia-Pacific & Middle East addressed the issue of water contamination caused by the foams traditionally used by fire tenders at airports across the globe.

The event built upon discussions held at the joint ACI Operational Safety and Environment committees in Kobe, Japan, where it was agreed that there was a need for exploring and sharing best practices for eco-friendly firefighting foams.

Despite the challenges associated with adopting new firefighting foams, such as modifications to fire tenders and training personnel, the webinar demonstrated that airports can successfully transition to more environmentally friendly practices while maintaining safety standards.

SAVE THE DATE



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HOST





ONBOARD FOR GROWTH

With soaring traffic figures, an ambitious new investor and plans to become the first transfer hub in the Philippines, these are exciting times for Mactan Cebu International Airport, writes Joe Bates.

Air traffic is on a huge growth trajectory in the Philippines and Mactan Cebu International Airport (CEB) is no exception to the rule, with passenger numbers soaring by an incredible 81% last year to just over 10 million.

The impressive numbers ensure that CEB is already the second busiest airport in the country, and it will cement that status this year with traffic expected to rise by 20% to return to pre-pandemic levels of around 12 million passengers per annum.

Domestic travel accounted for 75% of all passengers handled at the airport last year, while the South Korean market fuelled international traffic, making up 40% of 2.5 million passengers that arrived or departed on international services in 2023.

There are, of course, a number of reasons for the healthy upturn in traffic at CEB, but arguably among the most important are the impetus given to it by new shareholder Aboitiz InfraCapital, and its flourishing partnership with homebased carrier Cebu Pacific.

The airport's route development team must also take a lot of credit for its current success as the country's main gateway to the Central Visayas is currently served by 20 airlines, which between them operate flights to 26 domestic and 12 international destinations from CEB.

These currently include 66 weekly flights to Seoul-Incheon and more than 20 services per week to Hong Kong, Tokyo, Busan, Singapore and Chinese Taipei.

With South Korea being one of its key markets, it is perhaps not surprising to find that South Korean carriers have a strong presence at CEB. They include Asiana, Jeju Air, Jin Air, Korean Air and T'way Air.

Emirates and Eva Air also serve Mactan Cebu International Airport, as do regional low-cost carriers Scoot and Tigerair Taiwan.

The impressive number of airlines and destinations served from CEB – located on an 800-hectare site in Lapu-Lapu City – led to the gateway winning a prestigious award at Routes Asia earlier this year for its “exceptional contributions to airport and destinations marketing in the Asia-Pacific region”.

Speaking at the recent ACI Asia-Pacific & Middle East Regional Assembly in Riyadh, airport CEO, Athanasios Titonis, said: “We are delivering something new in the Philippines. We [Mactan Cebu] will be the first transfer hub in the Philippines, a development we hope will provide the catalyst for growth in both international and domestic air travel.

“Domestic tourism has huge potential for us. We currently handle around eight million domestic passengers a year,



of which 2.5 to 3 million are tourists. The plan is to work closely together with Cebu Pacific to develop our D to D [domestic to domestic] activity based on minimum connection times of around 35 minutes.

“We also aim to work with Cebu Pacific and the other airlines to reduce our minimum connection times for international services with onward connections to the other [Philippine] islands to 45 minutes.”

Regarding future route development, Titonis reveals that his airport is actively exploring opportunities beyond Asia.

In fact plans are underway to develop routes in markets such as India, Russia, Australia, and the United States, among others.

OWNERSHIP AND NEW SHAREHOLDER

The airport is operated by the Aboitiz InfraCapital GMR Cebu Airport Corporation (AGMCAC) on behalf of Mactan-Cebu International Airport Authority.

It replaced predecessor, GMR–Megawide Cebu Airport Corporation (GMCAC) – a joint venture between Indian global airport operator, GMR Airports Limited, and local company Megawide Construction Corporation – in September 2022, when the Philippine infrastructure investment group, Aboitiz InfraCapital (AIC), acquired a 33.3% stake in the former operator with a clause to purchase the remaining shares in the company on October 30, 2024.

At this point it is worth noting that GMCAC, which took over the responsibility for operating and developing Mactan Cebu in 2014, has arguably been one of the most successful concessions in the region based on its transformation of the airport.

It has, for example, invested hundreds of millions of dollars on enhancing and modernising the airport, with upgrades including the renovation and expansion of Terminal 1, the 2018 opening of CEB’s impressive new Terminal 2, and early 2024 completion of a second runway.

At the time of the AIC deal in September, 2022, BDO Capital and Investment Corp president, Eduardo Francisco, was quoted by Inquirer.net as stating that the equity infusion would bode well for GMCAC as it “provides it with more financial muscle, with a higher capitalisation, bigger balance sheet and an improved gearing ratio.”

He added that it also paved the way for the entry of another experienced and strong industry player as Aboitiz’s airport portfolio includes Bohol-Panglao and Laguindingan in the Philippines.

While a statement from Aboitiz InfraCapital declared that the deal would “propel Mactan Cebu International Airport to the next level and establish its status as the Philippines’ premier international airport.”

Indeed, AIC’s president and CEO, Cosette Canilao, remarked: “We look forward to working side by side with our partners in further developing the Mactan-Cebu International Airport into a world class airport.

“The goal is to propel MCIA to the next level and establish its status as one of the Philippines’ premier international airports.”

While Rafael Aboitiz, AIC’s vice president – head of airports business, noted: “Mactan Cebu International Airport is more than just an airport, it’s a vital gateway to Cebu and



the Philippines. Every passenger who travels through our doors drives economic growth, fosters closer cultural connections, and enriches themselves with the beauty and wonder of the Philippines.”

A potential example of what the future might hold for the airport under AIC was revealed earlier this summer when he shared plans for a study to investigate the potential development of a new mall and hotel at CEB as part of their long-term ambitions for the gateway.

Titonis certainly has no doubt that Aboitiz InfraCapital's investment and involvement in Mactan Cebu will help the airport achieve new levels of success over the coming years.

He says: “We have ambitious goals that drive us toward our vision of becoming the world-class tourism and transfer gateway to the Philippines, with Cebu’s strategic central location giving us a unique advantage.

“To achieve this, we aim to tap into new and emerging markets through our diverse offerings. Our exceptional staff, the heart of our operations, combined with advancements in technology, will allow us to enhance efficiency and continue raising the bar for an outstanding passenger experience.”

CUSTOMER EXPERIENCE

Providing top quality customer service at the airport is important to Titonis and his management team, which is one the reasons he is so delighted at Mactan-Cebu International Airport achieving Level 2 in ACI’s Airport Customer Experience Accreditation programme.

The new milestone, achieved this summer, follows last year’s historic achievement when CEB became the first airport in the Philippines to receive Level 1 accreditation, setting a new benchmark for excellence.

The Level 2 accreditation, of course, acknowledges CEB’s effective customer experience strategy in managing daily operations and maintaining high customer satisfaction.

“Year after year, we refine our customer experience strategies by leveraging innovation and engaging in consultations with passengers and other stakeholders,” says AGMCAC’s customer experience head, Ricia Montejo.

“Apart from the warm and inviting culture that the airport practices towards its passengers, we gather representatives from different age groups to seek their ideas and understand their sentiments, which are relevant in enhancing the overall airport experience.”

Speaking about CEB’s customer service philosophy, Mactan-Cebu Airport Authority’s general manager, Julius Neri, enthuses: “A clear and proven strategy that meets global standards is at the core of our operations.

“We ensure smooth movements are facilitated daily in the airport and create and manage long-term plans that put our customers first.”

This accolade was followed by the August 2024 award of a 4-Star Skytrax rating for Terminal 2, which judged the facility for the overall efficiency of its staff, hospitality, service consistency, and language proficiency.

Skytrax itself said that the rating is testament to CEB’s commitment to delivering a top-tier passenger experience, underpinned by exceptional service and product quality.

Reflecting on the award, Titonis says: “The dedication of our airport staff plays a crucial role in our operations. Kudos to our team for their outstanding performance.

“We are committed to going the extra mile to ensure the comfort and safety of our passengers.”



Montejo simply notes that “providing friendly and efficient service is at the core of our commitment to passengers”. She adds: “We achieve this by conducting training programmes that meet global customer service standards.”

SUSTAINABILITY

The airport operator is equally committed to protecting the planet and supporting its neighbouring communities by ensuring CEB’s sustainable and responsible development. This dedication is reflected in the recent achievement of gaining Level 1 ‘Mapping’ status in ACI’s Airport Carbon Accreditation programme.

Titonis enthuses: “Achieving Carbon Neutrality is a long journey that requires time, dedication, and innovation in our approach to reducing carbon emissions.”

He notes that Mactan Cebu is fully onboard with embracing electrical vehicles as aviation transitions away from using fossil fuels to power ground vehicles and equipment at airports in line with the industry’s net zero CO2 emissions target.

The CEO is also quick to point out that solar panels across the airport site will supply 12% of CEB’s energy by the end of the year, and dangles the carrot that the gateway might host a “lighthouse project” in the future, possibly involving the use of hydrogen.

Its ‘coastal clean-up’ initiative recently won the top Platinum Award in ACI Asia-Pacific and Middle East’s Green Recognition 2024 programme for airports handling between 8-15mppa.

The airport is also pioneering the use of aircraft on-the-ground power solutions such as the Fixed Power Unit (FPU) and Pre-conditioned Air (PCA) services to reduce carbon emissions and offset fuel costs upon boarding and the arrival of passengers.

The FPU is an eco-friendly ground power system that enables aircraft to connect directly to a stationary, electricity-powered energy source while parked at a contact stand. Additionally, PCA is an external device used for cooling and dehumidifying, delivering fresh, preconditioned air to the aircraft and jet bridges between flights.

Crucially, home carrier Cebu Pacific supports the initiative, its president and CEO, Xander Lao, noting: “Cebu Pacific fully supports Mactan Cebu International Airport’s ground equipment solutions initiative.

“This represents a crucial step forward in creating a sustainable future for Philippine aviation. By being the first airline to use this technology at Mactan Cebu, we are not only reducing our carbon emissions but also setting a benchmark for the industry.”

The airport began this particular sustainability initiative in 2020 with the initiation of FPU and PCA services through Bridge Mounted Equipment (BME). Despite pandemic-related delays, it obtained in principle approval from airline partners for the initiative in the fourth quarter of 2019 and is now moving forward with implementation.

As a result, the airport installed FPU and PCA units under passenger boarding bridges, ensuring easy access for aircraft. This shift is expected to reduce fluctuating fuel costs, APU maintenance costs, CO2 and NOx emissions, airport noise levels, and improve operational safety.

“Airlines could potentially see a cost reduction of 40% to 60% by transitioning to BME services at Mactan Cebu International Airport,” enthuses Titonis.

“With the multiple benefits of BME services, we are confident in the support of our airline partners to implement these sustainable solutions at MCIA. Together, we can reduce our environmental impact and pave the way for a greener future in aviation.”



GOING GREEN

Airports across Asia-Pacific and the Middle East continue to raise the sustainability bar and reduce their carbon footprint, writes Joe Bates.

BENGALURU AND DELHI GATEWAYS LEAD THE WAY

Two of India's busiest airports, Bengaluru-Kempegowda and Delhi-Indira Gandhi have joined an elite group of 16 leading airports worldwide by achieving the highest Level 5 status in ACI's Airport Carbon Accreditation programme.

This accomplishment underscores the growing momentum of the programme in the region and highlights the crucial role that airports play in driving decarbonisation efforts in the aviation sector.

Bengaluru's Kempegowda International Airport (BLR) has adopted a science-based approach to reducing carbon emissions across its operations.

The airport is committed to achieving 100% renewable electricity consumption, implementing afforestation initiatives, and promoting the adoption of electric vehicles.

With a robust renewable electricity infrastructure in place, including onsite solar power generation through a Power Purchase Agreement (PPA) model and an offsite PPA arrangement for solar and wind power, the airport has made substantial progress in reducing its carbon footprint.

Indeed, in 2023, Kempegowda achieved a remarkable 95.6% reduction in Scope 1 and 2 emissions. Looking ahead, the airport is committed to achieving net zero emissions for Scope 3 by 2050, demonstrating its long-term dedication to sustainability.

Hari Marar, managing director and CEO of Kempegowda operator, Bangalore International Airport Limited

(BIAL) enthused: "We are delighted to be one of the first airports in Asia to attain ACI's Level 5 accreditation and to lead the way with the highest emission elimination by an Indian airport.

"Achieving Net Zero Greenhouse Gas Emissions seven years ahead of our target is a testament to BLR Airport's unwavering commitment to sustainability. This accomplishment not only sets a new benchmark for us but also reinforces our dedication to creating a greener future for all."

Delhi's Indira Gandhi International Airport (DEL) has also implemented a series of strategic initiatives to reach net zero for the emissions under its direct control.

Key measures include transitioning to renewable energy, promoting the use of electric vehicles within airport operations, and upgrading infrastructure to support environmentally friendly practices.

The airport has installed a 7.84 MW solar power plant on airside land that has significantly reduced its reliance on conventional energy sources.

Additionally, the airport has expanded its fleet of electric vehicles and taxibots, further decreasing emissions and fuel consumption in line with its ambitious target to achieve net zero Scope 3 emissions by 2050.

Christchurch is the only other gateway in the ACI Asia-Pacific & Middle East region to achieve Level 5 in the Airport Carbon Accreditation programme.



GOOD YEAR FOR SUSTAINABILITY IN HONG KONG

Hong Kong International Airport (HKG) provides a comprehensive round up of its sustainability achievements over the last year in its Sustainability Report 2023/24.

The report – covering Airport Authority Hong Kong's fiscal year ending March 31, 2024 – reveals that its newly introduced strategic framework, Ascend, focused on 24 strategic goals across the sustainability pillars of Environmental Excellence, Operational Excellence, Thriving Economies and Societies, and Thriving People.

Highlights of the report are said to include AAHK being recognised as a '2024 Top-Rated ESG Performer' by Sustainalytics, a well-established rating company; HKG becoming the first airport in the world to deploy the award-winning Digital Apron together with Tower Management System (DATMS) for airport operations; and AAHK launching a Renewable Diesel (RD) pilot programme, making HKIA the first Asian airport to use RD in ground services equipment.

Other successes worthy of note, says AAHK, include two of HKG's aviation fuel facilities obtaining the International Sustainability and Carbon Certification: Carbon Offsetting and Reduction Scheme for International Aviation (ISCC CORSIA) certification for Sustainable Aviation Fuels handling.

In his introduction to the report, AAHK chairman and former CEO, Fred Lam, says: "Sustainability at AAHK is not just about what we do in good times – it's also about what we do in difficult times. With this in mind, and despite the challenges of the pandemic period, we continued investing in projects across numerous aspects of sustainability.

"As we look ahead, climate change remains a significant challenge for our industry. We are pioneering efforts in this area, including by supporting the adoption of lower-carbon fuels."

ANOTHER MILESTONE FOR QUEENSTOWN AIRPORT

Queenstown Airport has achieved Level 4+ 'Transition' status in ACI's Airport Carbon Accreditation programme.

The New Zealand gateway says that the achievement acknowledges its commitment to sustainability and progress towards decarbonisation.

Only 46 of the more than 40,000 airports worldwide have been accredited at Level 4+ or 5.

The airport's chief executive, Glen Sowry, enthused: "Aviation is a challenging industry to decarbonise. We've set ambitious sustainability targets and invested heavily to reduce our carbon footprint as quickly as possible. It's pleasing to see that recognised, although there is a lot more work to be done."

Since its initial carbon audit in 2019, Queenstown Airport has reduced its operational absolute emissions by 71% and is targeting an 85% reduction in absolute emissions by 2028.

That progress is based on a commitment to electrification, transition to a certified renewable electricity supply, upgrading of assets and infrastructure to increase efficiency, and a decision to stop using a diesel generator for supplementary power during periods of peak demand.

SIHANOUK SUCCESS STORY

Sihanouk International Airport in Cambodia has been recognised for its continued efforts to reduce its carbon footprint, recently upgrading to Level 3 Optimisation status in the Airport Carbon Accreditation programme.

The achievement underscores the airport's dedication to expanding its carbon management efforts by including Scope 3 emissions, which involves working closely with third-party operators to reduce their environmental impact.



To achieve the Level 3 milestone, the airport has invested heavily and deployed multi-pronged initiatives, which include commissioning more efficient chiller systems for its central air conditioning.

In addition it has replaced all lighting sources with more energy efficient LED technology; installed automatic systems to reduce and optimise the energy consumptions in the main buildings; and conducted awareness campaigns across the airport campus to promote more sustainable behaviour and carbon reduction initiatives.

Cyril Girot, CEO of Cambodia Airports, said: “We are continuing our commitment onward with respect to fighting climate change, intensifying our efforts in every possible way to substantiate our vision for Positive Mobility.


“Having our partners join concrete actions that we have implemented bodes well for our next accomplishments. I want to express my appreciation to them and to our personnel for their crucial contribution.”

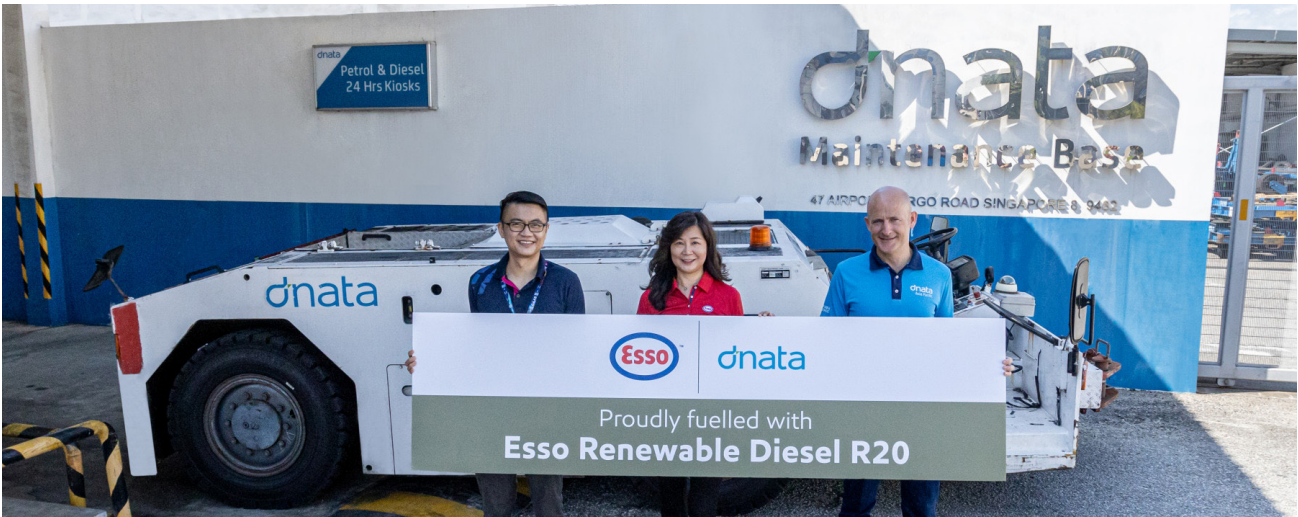
CLEANER GROUND HANDLING VEHICLES AT SINGAPORE CHANGI

Dnata and ExxonMobil have started a six-month trial to fuel 12 of dnata's airside vehicles and generator sets with renewable diesel at Singapore Changi Airport.

The trial uses Esso Renewable Diesel R20 (R20), which is a high-quality fuel with an estimated 15.4% lower lifecycle greenhouse gas (GHG) emissions compared to conventional diesel.

It is the first ground handler at Changi Airport to use renewable diesel, with partial funding provided by the Civil Aviation Authority of Singapore (CAAS) as part of its Aviation Sustainability Programme.

If successful, the trial could be rolled out to 200 airside vehicles and generator sets across dnata's ground handling and cargo operations. This would mark a further step towards the dnata Group's goal of reducing its carbon footprint by 50% by 2030 as part of its eight-year strategy. 



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GREEN MACHINE!

Its achievements, ambitions and commitment to protecting the environment quite simply make Christchurch Airport one of the greenest and sustainably run gateways on the planet, writes Joe Bates.

An ever growing list of accolades for its sustainability initiatives ensure that New Zealand's Christchurch International Airport is a world leader when it comes to its efforts to mitigate its impact on the environment.

These include becoming the first airport in the Southern Hemisphere to achieve the top Level 5 status in ACI's Airport Carbon Accreditation programme and being a regular winner in ACI Asia-Pacific & Middle East's annual Green Airports Recognition programme.

In 2023, for example, its new approach to minimising waste, and its work mentoring other airports to become more sustainable, earned it two Green Recognition awards from ACI Asia-Pacific & Middle East.

It is a member of both the Climate Leaders Coalition – a CEO led community of close to 90 organisations in New Zealand leading the response to climate change through collective, transparent and meaningful action on mitigation and adaptation – and the Sustainable Business Council, which “exists to mobilise the country's most ambitious businesses to build a thriving and sustainable future for all”.

Not surprisingly, its growing reputation as a green pioneer means that its sustainability transition leader, Claire Waghorn, is often in demand at industry events to talk about aviation's climate impact and Christchurch International Airport Limited's (CIAL) sustainability strategy, and this year's joint ACI Asia-Pacific & Middle

East/ACI World Annual General Assembly, Conference and Exhibition in Riyadh was no exception.

Indeed, in a one-on-one interview with PA Consulting's Kata Cserep, Waghorn revealed that the New Zealand gateway began measuring its carbon emissions back in 2006, joined ACI's Airport Carbon Accreditation programme in 2017, and became one of the first gateways in the world to achieve the new Level 5 status in the programme in late 2023.

In response to why the airport is so committed to the Airport Carbon Accreditation programme and sustainable development, Waghorn said: “There are many answers to that, not least environmental, but from an airport perspective, it's also good business.

“New Zealand is geographically a long way from everyone and, as such, we rely heavily on aviation. We are a market based economy, and for New Zealand, trade [effectively] means aviation. If we aren't front footing this, the carbon border adjustment for business and trade will really start to affect New Zealand. So, from a trade, environmental and next generation perspective, we have to do our bit. This is also what people increasingly expect from a modern business.”

She noted that the airport's sustainability goals had also allowed it access more financially favourable loans for key infrastructure development projects.

On the topic of renewable energy, Waghorn said: “The airlines can't get to net zero without the



infrastructure to support them, which is one of the key reasons why we are building our renewable energy precinct [Kōwhai Park].

“We are trying to replace jet fuel with renewable energy, so going forwards, airports really need to turn their minds to clean energy and expand to become clean energy hubs.”

In Christchurch’s case, it is undertaking the solar power venture in partnership with joint venture partners Lightsource bp and Contact Energy.

Waghorn admitted that working with JV partners better suited the airport’s balance sheet, and noted that she believes that airports with large landholdings should be considering future clean energy revenue streams, which would be game changing.

KŌWHAI PARK

In August, Christchurch Airport’s proposed clean energy hub took a huge step closer to becoming reality when development partners Contact Energy and Lightsource bp confirmed their investment to build the Kōwhai Park solar farm.

With around 300,000 panels spanning 230 hectares, Kōwhai Park will help meet the growing demand for renewable energy, its initial 170MW solar farm expected to generate 290GWh of electricity per year – equivalent to the consumption of around 36,000 homes.

“Kōwhai Park highlights our commitment to support decarbonisation through creating a clean energy hub that will fuel the region’s economic prosperity,” noted Christchurch Airport’s chief executive, Justin Watson.

“This array will be the same size as around 220 rugby fields – it will be an impressive sight for everyone flying to or from Ōtautahi Christchurch.

“It’s great to see our partners Contact Energy and Lightsource bp ready to develop Stage 1 of Kōwhai Park. These two organisations have all the expertise to make this a project that Canterbury can be proud of and we’re grateful to have them onboard.

“We’re also grateful to Orion, Environment Canterbury and Airways for helping us reach this milestone.”

Watson, who described the news as an exciting first phase for Kōwhai Park, continued: “We’re focused on getting other renewable energy projects located there so we can become a clean energy hub that will enable our city and region to decarbonise and help New Zealand reach its net goals.

“The announcement paves the way for Lightsource bp and Contact Energy to begin construction in the coming weeks. We look forward to celebrating more then.”

AIRPORT CARBON ACCREDITATION LEADER

As mentioned above, Christchurch was among the first airports in the world to achieve Level 5 status in ACI’s Airport Carbon Accreditation programme.

When the news was announced, ACI Asia-Pacific & Middle East’s director general, Stefano Baronci, stated: “Christchurch Airport has been a pioneer of airport sustainability in Asia-Pacific and Middle East, being the first airport operator in the world to reach level 4 in the ACA programme. It has confirmed its leading role in decarbonisation by being among the few airports in the world, and first in Asia-Pacific to achieve Level 5 in the Airport Carbon Accreditation Programme.

“This means having reached and maintained a net zero carbon balance for emissions under its control. This success has been based on the long-term vision of the company, a clear roadmap towards net zero and the commitment of its team and industry partners.



“We hope this milestone will encourage other airports to strive towards sustainability goals and pursue initiatives that lead to more environmentally responsible aviation industry.

“To support our airport members, ACI APAC & MID will also play its part by assisting airports to develop roadmaps to achieve their net-zero goals.”

The other nine airports are Amsterdam Schiphol, Eindhoven and Rotterdam-The Hague in the Netherlands; Beja, Madeira and Ponta Delgada in Portugal; Göteborg Landvetter and Malmö in Sweden and Toulon-Hyères in France.

- To achieve this level of accreditation an airport must:
- Submit a verified carbon footprint for Scope 1 and 2 emissions and all relevant categories of Scope 3 emissions as per requirements of the GHG Protocol Scope 3 Guidance.
 - Reach and maintain up to 90% absolute CO2 emissions reductions in Scope 1 and 2, and commit to Net Zero in Scope 3 by 2050 or sooner.
 - Apply credible carbon removals for the residual emissions.
 - Develop a Carbon Management Plan (CMP) outlining the steps to achieve emissions targets.
 - Develop a Stakeholder Partnership Plan to achieve Net Zero for Scope 3 emissions by engaging with the value chain, and actively drive third parties at the airport towards delivering emissions reductions themselves with regular milestones in line with their sectors’ net zero frameworks and commitments.

“Christchurch Airport’s been working hard at this for more than 15 years. A dedicated team of people have gone above and beyond to get us here,” enthused Watson.

“I’d also like to acknowledge the assessors who independently verify our work, the ACA Asia Pacific team, and those who have challenged us to lift the bar even higher. We thank them for their support and challenge.”

Reflecting on the achievement, Waghorn said: “This is a great moment for our team. This is a challenging sector to abate and no one is under any illusion – we have a whole lot more work to do to decouple carbon from aviation and make the zero aviation dream a reality.

“We recognise however the critical role that aviation plays, especially for isolated nations, and therefore are committed to being part of the solution. That’s why 90% of the work we do now focuses on how we can help other businesses, including our airline partners decarbonise.

“As a business we are working hard. We’re part of a consortium to enable hydrogen aviation to take off in New Zealand and we’re helping lead Sustainable Aviation Aotearoa.”

Airport Carbon Accreditation is the only institutionally-endorsed, global carbon management certification programme for airports.

It independently assesses and recognises the efforts of airports to manage and reduce their carbon emissions through its levels of certification: ‘Mapping’, ‘Reduction’, ‘Optimisation’, ‘Neutrality’, ‘Transformation’, ‘Transition’ and ‘Level 5’.



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FUEL FOR THOUGHT

Andrew Caughey, head of sustainable aviation at AtkinsRéalis, offers advice to airports seeking to become future fuels ready.

Airports will be a critical enabler for the transition to zero emission flight. While future flight aircraft are progressing swiftly through their development cycle, they won't be able to deliver on their promise of cleaner aviation and improved connectivity without appropriate infrastructure 'on the ground' to support their operation.

Sitting at the heart of the aviation ecosystem, airports will need to adapt to ensure they can support multiple fuels through the transition, at pace.

But designing for the future is about more than predicting what it will look like – it's about turning predictions into projects that deliver results to meet ever-changing aviation needs.

This presents airports with significant challenges: they need to consider and accommodate multiple changes to their infrastructure, against the context of existing master plans and capital programmes.

They will need to move from providing a single primary fuel type, to supporting multiple fuel types, to service novel aircraft and new operational concepts.

But as technology is evolving at different paces the fuel mix will change over time, based on technology developments and future operational needs. Managing this transition will also be a major challenge.

And with the majority of aviation emissions coming from fuel burn in aircraft, classified as Scope 3 (indirect) emissions for an airport, they face the further challenge of tracking, controlling and managing emissions from their supply chain, as opposed to from their own direct emissions.

With these challenges, however, come numerous possibilities to capture the disruptive new opportunities arising from the advanced air mobility market, to operate as energy hubs, or even to future-proof existing planned developments.

Add to this the contribution future fuels readiness makes to emissions' reduction and social value, and overcoming these challenges could offer airports a competitive edge.

DEMAND, SUPPLY AND IMPLEMENTATION

No two airports are the same, so global technology roadmaps – whilst useful for illustration – need to be adapted to consider each airport's specific context and requirements.

A systematic approach is required, to assess what the transition to future fuels means for individual airports, recognising their varying operations and constraints. The drivers for change, and the pace of transition will be different for each airport, but we believe the approach needed can be broken down into three fundamental blocks of analysis – demand, supply and implementation.

Demand analysis delivers understanding of the scale of storage required for future fuel flight operations. First evaluating airports' planned movements, growth, routes and existing fleet, it then uses aerospace insights and experience to enable assessment of how new propulsion technologies will directly impact aircraft operating from these airports. This converts abstract technology roadmaps into useful planning intelligence for airport teams.

Supply assessment explores how to secure the energy required to power the fleet – considering existing resources, and what is available across the full range of future fuels – either local to the airport or by import – to meet the projected demand.

This can include assessing the potential of the airport acting as an energy hub, by generating 'behind the meter' or by securing a supply of Sustainable Aviation Fuels (SAF).

Implementation planning draws on master planning and infrastructure expertise to identify the critical challenges and opportunities future fuels offer to each individual airport.

With airports potentially considering their fuelling strategy and partnerships, policies and incentives, or planning and spatial constraints linked to infrastructure developments, this enables sequencing of developments – allowing airports to prioritise specific interventions as they integrate emerging fuel and power generation technologies into their aviation ecosystem.

ACCELERATING SUSTAINABLE FLIGHT

We've delivered this approach at airports such as Keflavik in Iceland, where we worked alongside global consultancy and construction firm, Mace, to help the airport assess its future fuels technical requirements ahead of master planning and development activities.

STEP 1 – BASELINE

- Forecasts and flight data
- Fleet replacement
- Development plans

STEP 2 – DEMAND

- Traditional fuels
- Total energy
- Future fuel allocation

STEP 3 – SUPPLY

- Supply
- Storage
- Distribution

STEP 4 – INFRASTRUCTURE

- Off airport
- On airport
- Operations

STEP 5 – PLANNING

- Master plan overlay
- Road map
- Future focus areas

Using a five-step process, moving from baselining, through demand, supply, infrastructure and planning

tailored to each airport's operation, input from key airport stakeholders is essential to each stage.

For example, understanding how future fuel contributes to total energy demand would be aerospace engineer-led, while process engineers would lead on fuel source and supply, and airport planning on infrastructure requirements.

Time-based scenarios help inform future fuel uptake testing sensitivity. This process can help underpin development planning – ensuring, for example, space is reserved for fuel storage, or providing input into infrastructure plans such as electrical supply upgrades – and can offer a timeline for decision making and future investment.

Supporting Keflavik in this way, we helped it to quantify and rationalise its requirements, enabled its impactful interactions with airlines, and regional and local government stakeholders, and empowered the development of its plans to implement future fuels.

ENABLING RESILIENCE AND COMPLIANCE

If you are involved in helping airports face similar challenges, it's also important to consider the resilience aspect of properly assessing your organisation's future fuels readiness. This may be in the context of energy security, ensuring continuity of fuel supply from a diverse future supply chain to avoid future service disruptions and understand the necessary reserves of each fuel type.

Alternatively, you may be focused on enabling compliance with sectoral obligations on the adoption of SAF and alternative fuels such as RefuelEU, or the UK SAF mandate.

Irrespective of your strategic driver, it is crucial to act from a position of knowledge, bringing supporting data to quantify the size and timescales of the disruptive impact to your airport arising from this transition.

Whether the decision is to act immediately, or to leave space for future activity, a data-driven approach helps align the myriad of stakeholders who drive change at airports and direct capital spend.

Our goal is to help airports efficiently accelerate their decarbonisation, enabling them to take advantage of the benefits of emerging technologies such as electric and hydrogen aviation, to capitalise on disruptive new transportation modes such as Advanced Air Mobility, and to secure the required supply of SAF, all whilst improving connectivity and customer experience.

In an era where the future of aviation is being reimaged at the crossroads of traditional sectors, by becoming future fuel ready airports can help to accelerate the realisation of low carbon, sustainable flight.



GAME CHANGER

Abu Dhabi Airports CEO, Elena Sorlini, tells Joe Bates more about the transformational benefits of Zayed International Airport's new Terminal A and the company's customer service strategy.

WHAT DOES GOOD SERVICE MEAN TO YOU?

In an airport sense, to me great customer service is about transforming the airport experience into an exciting and memorable part of the journey for our visitors. It's about ensuring that airport processes are seamless, quick, and enjoyable, but just as importantly it is about delivering a stress-free overall experience that leaves passengers feeling relaxed and valued. From the moment they arrive at the terminal to the time they board their flight, every interaction should be designed to exceed expectations and create a sense of anticipation for their next visit.

By providing exceptional service, we aim to make Abu Dhabi a destination that passengers look forward to returning to, time and time again. Whether it's through personalised assistance, world-class amenities, or innovative services, our goal is to make every journey through our airport a wonderful adventure in its own right.

HOW IMPORTANT IS NEW INFRASTRUCTURE WHEN IT COMES TO ENHANCING THE AIRPORT EXPERIENCE?

Passengers today expect more from airports than they used to. In our case, the new Zayed International was needed to meet the exponential growth in demand from both visitors and airlines and to unlock the full potential of Abu Dhabi Tourism and Trade.

It has doubled the capacity of the old terminals, managing up to 45 million passengers annually, both visiting and in transit. It is no exaggeration to say that the terminal was designed to provide the most innovative, safe, and

seamless airport experience, meeting the highest standards of quality and service required by the aviation industry and passengers. Its X shape optimises operational efficiencies and reduces walking times.

HOW BIG A ROLE DOES 'SENSE OF PLACE' AND 'ART' PLAY IN YOUR CUSTOMER EXCELLENCE STRATEGY?

Zayed International Airport's new branding encapsulates the spirit of the new airport beyond its physical structure of steel and glass. We were inspired by the design of this iconic terminal, with each pier representing and pointing to either the city, desert, oasis, or sea – landscapes synonymous with Abu Dhabi.

Using this for creative inspiration, we've linked each of those piers to a key landmark, immortalised in the brand logo we've recently unveiled. From the Great Hall of Terminal A to the historic walls of Qasr Al Hosn, the legacy of Emirati navigators embodied by the dhow boat, to the enduring properties of date palm trees and the desert sun, these unique features create a sense of place for passengers, providing an unforgettable experience.

This is not just about the infrastructure. We have been working hard to ensure that the level of service we offer matches the beauty of the terminal, creating a consistently superior end-to-end passenger experience.

From a seamless journey powered by the latest smart scanning technology to intuitive systems that prioritise ease of movement and passenger rest, Zayed International Airport is built with our passengers and partners at its very heart.



The airport encompasses elements of rich Emirati culture and a strong foundation of Arabian heritage, fostered by the vision of the UAE's founding father, to whom the new airport pays due homage.

We wanted to showcase the late Sheikh Zayed's legacy to the visitors of Abu Dhabi due to his significant contributions to the emirate, which he helped develop into a centre for business, tourism, and culture.

Last, but not least, Zayed International Airport is home to one of the largest environmental art installations in the Middle East, the Sana Al Nour, a Barjeel structure inspired by the wind towers of the Gulf region. It weighs approximately 100 tons and incorporates 1,632 curved glass panels. It stands 22 metres tall and 17 metre wide.

The traditional Barjeel design facilitates an energy-saving airflow for the entire terminal building; it allows natural light and cool air to pass through the front and top of the structure while heat rises through the middle.

HAS THE NEW AIRPORT EMBRACED THE VERY LATEST TECHNOLOGY?

Absolutely. I would even go as far to say that we have set a new standard in airport technology as Zayed International Airport stands out as the first and only airport worldwide to utilise a nine-touch-point facial recognition journey.

This technology is deployed at various stages of the airport experience, including the self-bag drop area and counters. As a result, passengers enjoy significantly reduced queueing times for a hassle-free and seamless journey through the airport. Furthermore, there is no longer a need for physical documents to navigate through immigration and boarding processes, enhancing convenience and ensuring the highest levels of safety and security.

Finding your way through the airport has also been made easier thanks to the augmented reality Wayfinder, which enables real-time navigation throughout the terminal to support airport guests. Route selections are personalised with animated 3D themes for Desert, Oasis, City, and Sea, offering interactive and convenient navigation for an enhanced and entertaining experience. Finally,

passengers can expect a rapid journey, as they can go from kerb to gate in just 12 minutes, minimising wait times and maximising efficiency.

IS IT POSSIBLE TO HIGHLIGHT THE MAIN CUSTOMER SERVICE GOALS YOU STRIVE TO ACHIEVE?

Just one word should suffice to answer this question, 'Excellence'. Indeed, excellence in all aspects of customer service.

CAN YOU GIVE US SOME EXAMPLES OF CUSTOMER SERVICE EXCELLENCE AT ZAYED INTERNATIONAL AIRPORT THAT YOU BELIEVED HELPED IT DO SO WELL IN ACI'S ASQ SURVEY?

At Zayed International Airport, customer service excellence is ingrained in our company culture. This commitment is reflected in our airport design, products, services, and operations, particularly in passenger-facing touchpoints.

We have replaced traditional information desks with customer service agents who roam the airport looking for people to assist. They engage with passengers, assist with inquiries, and provide recommendations for food and beverage outlets available at our airport. In a large passenger terminal building, walking distances to gates can be challenging for some passengers. To address this, we offer complimentary roaming buggies throughout the terminal, prioritising passengers with reduced mobility, the elderly, families, and others in need.

In this day-and-age, connectivity is essential. Zayed International Airport offers complimentary Wi-Fi and mobile charging services to ensure passengers stay connected with their loved ones. Mobile charging services are available at seating areas airside and at charging stations near the gates. We also offer power bank charging services.

We are also proud of the airport's ambience. Zayed International Airport provides a state-of-the-art environment where passengers can relax while travelling. The terminal features plants and floor-to-ceiling glass windows, bringing the natural beauty of Abu Dhabi into the airport experience.



LOOKING GOOD!

With 80% of the project now complete and its first international airline secured, Western Sydney Airport is on track to open in late 2026.

Western Sydney Airport (WSI) is one step closer to reality following the completion of its roof, paving the way for the acceleration of its internal fit out.

According to a new statement, more than 80% of the new Western Sydney International (Nancy-Bird Walton) Airport is now complete, with domestic, international and air cargo services expected to commence from the gateway from late 2026.

Located at Badgerys Creek, 50 kilometres west of Sydney's CBD, WSI will initially be equipped to handle up to 10 million passengers per annum, but could become Sydney's biggest gateway in the long-term, potentially welcoming more than 80 million annually.

"Completion of the roof represents important progress for the project as it weather-proofs the building, allowing for the acceleration of internal works like the feature ceiling, departure areas, lounges and retail space," said a statement issued on behalf of Australia's Infrastructure, Transport, Regional Development and Local Government Minister, Catherine King, the country's Minister of Finance, Katy Gallagher, and Werriwa MP, Anne Stanley.

"More than 100 workers, including many Western Sydney locals, helped build the roof over the past 18 months – part of a broader workforce of around 3,500 people bringing WSI [Western Sydney International] to life each day.

"WSI also continues to support domestic manufacturers, with the new roof structure bolstered by more than 40 kilometres of Australian-made steel purlins and more than 3,500 tonnes of steelwork, primarily fabricated between Adelaide, Whyalla, Tamworth and Orange.

"More than 6,000 solar panels will be affixed to the roof to help power terminal operations and the broader airport.

"WSI is a transformational infrastructure project that will generate economic activity, provide employment opportunities for people in the Western Sydney region, and meet Sydney's growing aviation needs."

King personally added: "The countdown is well and truly on – it won't be long until the people of Western Sydney will be flying out of their brand new 24-hour international airport.

"I'm excited to witness the latest construction progress, especially the completion of the terminal roof, which is the culmination of about 18 months hard work by more than 100 tradespeople, many of whom are Western Sydney locals.

"The project has also shown strong support for domestic manufacturers – with steel for the roof sourced here in Australia. The airport has also invested more than half a billion dollars with hundreds of western Sydney businesses since construction began in 2017."

SINGAPORE AIRLINES TO SERVE SYDNEY GATEWAY

Singapore Airlines has become the first international carrier to announce that it will fly to Sydney's new 24-hour airport.

The new A\$5.3 billion Western Sydney Airport (WSA) secured the major overseas carrier following discussions about the airport's future functionality, customer experience, sustainability, operational efficiency, and mutual commercial opportunities.

WSI CEO, Simon Hickey, said at the heart of this arrangement – the first with an international airline for WSI – was recognition



of the airport's unique scheduling opportunities that airlines, like SIA, will be able to harness in the future.

"This inaugural international airline arrangement is a fantastic milestone for Western Sydney International Airport and reflects the positive response we've had from airlines, especially in regard to the unprecedented opportunities our 24-hour capability unlocks," noted Hickey.

Hickey said Western Sydney International Airport was focused on delivering a smooth and simple experience for its customers, underpinned by the latest technology, which was another major drawcard for Singapore Airlines.

"Our combined international and domestic terminal will give Singapore Airlines customers a seamless transfer experience, while our state-of-the-art baggage system and efficient design, including five-minute taxi times on the tarmac, means passengers will be able to get on their flight faster and relax and enjoy the award-winning service on board," added Hickey.

Singapore Airlines will join Qantas and Jetstar at WSI following their commitment to operating domestic services from the new airport. Indeed, the Qantas Group plans to operate up to 15 narrowbody aircraft from WSI within a year of its 2026 opening.

GOAL TO BE WORLD CLASS SHOPPING VENUE

The airport recently invited retailers who had successfully completed in an extensive registration of interest process to tender to become WSI's duty-free retail partner.

Hickey said: "We're excited to be building an airport in Sydney's cultural heartland that can be a destination in its own right, and we want to collaborate with retailers that champion customer engagement and provide a distinctive experience that reflects the region in which we'll be operating.

"While construction of the airport has been forging ahead, this announcement also shows we are building up momentum in important commercial offerings as we move closer to opening our doors from late 2026."

WSI's general manager for retail, Glyn Williams, is leading the planning and design of what will soon become a premier shopping and dining experience for Western Sydney.

"The tender is a rare opportunity for a duty-free retailer to join a spectacular new shopping destination that will put Western Sydney on the map," remarked Williams.

"We are focused on delivering a premium experience, providing access to world renown brands whilst incorporating a localised flavour."

WSI will have around 7,000 square metres of leasable retail space for customers to enjoy. This includes 40+ retail stores, and more than 2,200 square metres of duty-free space within the international terminal.

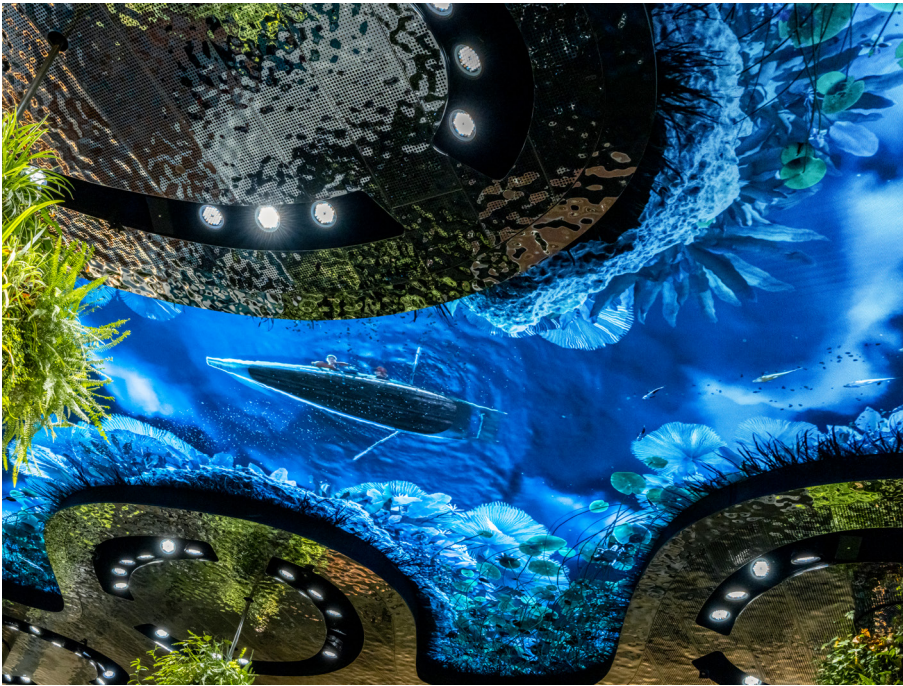
Tenders for other categories including foreign exchange, travel essentials, general retail, food and beverage and vending are among those that will be undertaken in the next 12 months.

WORLD BUSINESS PARTNERS PLAY KEY ROLE IN DEVELOPMENT OF AIRPORT

The initial design concepts for WSI were by Zaha Hadid Architects (London, UK) and Cox Architecture (NSW, Australia) with final design and construction by Multiplex (Australia).

However, a host of ACI World Business Partners (WBPs) from the ACI Asia-Pacific and Middle East region and around the globe are involved in the design and development of Western Sydney International Airport.

They include ADB SAFEGATE (turnkey airfield lighting solution); Airbiz (designated airport planner on the project, led by Multiplex and supported by Arup and Woods Bagot); Amadeus (strategic systems technology partner to co-create the digital passenger experience); Bechtel (project delivery partner); and Vanderlande (baggage handling system).



WORKS OF ART

Joe Bates takes a closer look at the introduction of innovative new artworks at Singapore Changi and Hong Kong airports.

Embracing art in terminal buildings might not be the newest fad in the world, but it appears to be one that airports across the globe are taking more seriously than ever before as they strive to create unique experiences for passengers and boost customer satisfaction levels.

Arguably, the most famous art installation of all is the Rijksmuseum at Amsterdam's Schiphol Airport, which has been showcasing world famous paintings at the Dutch hub for more than 22 years.

And in more recent times new airports such as Incheon International Airport in South Korea and Hamad International Airport in Qatar have embraced art and culture from the get go, between them boasting a series of impressive sculptures, paintings and museums.

Indeed, such is the desire to make an impression that art is being factored into the design of many new terminals being built today, and increasingly across the entire airport campus, to capture the attention of and excite travellers from the moment they arrive at the airport.

MULTIMEDIA ARCHITECTURE AND SUNFLOWERS AT CHANGI'S TERMINAL 2

Moment Factory in collaboration with design studio BOIFFILS has created two signature multimedia installations aimed at bringing the Garden City's natural beauty into Changi Airport's newly renovated Terminal 2.

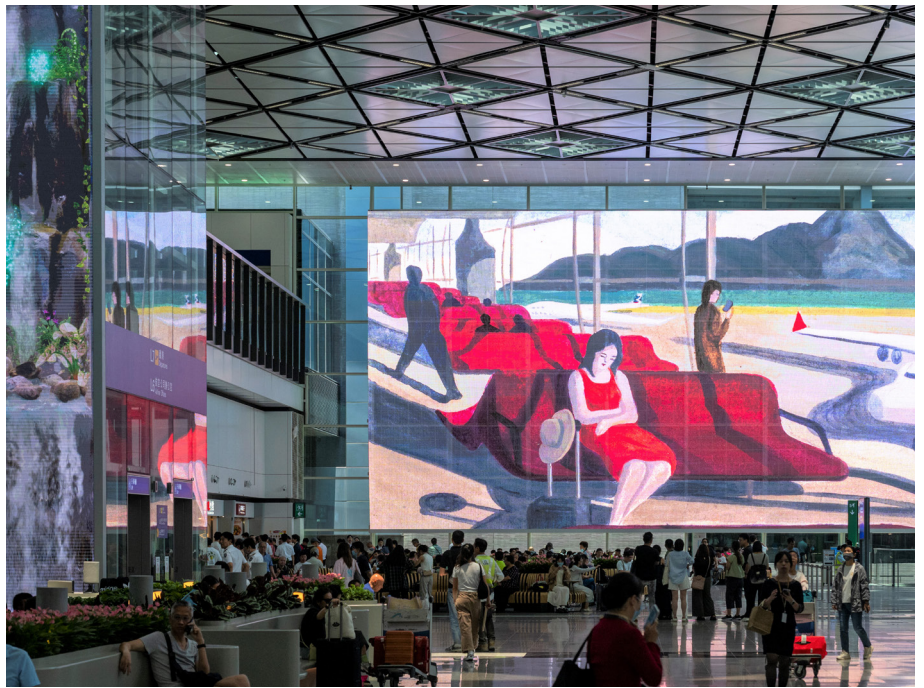
The features support the airport's goal to be a destination in its own right — a vision that's repeatedly earned it awards in ACI's Airport Service Quality (ASQ) customer excellence programme and numerous other accolades.

The Wonderwall is described as a breathtaking four-story digital waterfall nestled between vertical gardens, which utilises a curved LED screen that showcases a mesmerising cascade of water and rock formations. Multiple times an hour, a surreal choreography takes place as the flow dramatically reverses course for a three-and-a-half show set to a bespoke composition by pianist Jean-Michel Blais.

While The Digital Sky is a dreamscape that offers transit passengers a chance to unwind beneath a sprawling digital sky. Mirroring real-time daylight and meteorological conditions via integration with the airport's weather system, the overhead installation offers an unexpected view of the outside world.

At intervals, the sky transforms into a captivating underwater scene. Embedded within the greenery, an ever-evolving soundscape draws from nearly 100 recordings of local wildlife, spatialised to create an immersive nature experience.

"Our third collaboration with Changi Airport Group allowed us to really push the envelope, both creatively and technically," says Fady Atallah, creative director at Moment Factory.



“With these installations, travellers will get to immerse themselves in Singapore’s nature with two unique experiences in their journey: an awe-inspiring moment at the Wonderfall and a surprising pause under the digital sky in the dreamscape.”

In another pioneering initiative, in September, Singapore Changi unveiled the world’s largest ever display of sunflowers at an airport, with some larger than life sculptures being eight metres tall.

‘A Sunflower Sojourn’ features over 5,000 sunflowers of more than 10 exquisite varieties, beautifully arranged at over 20 locations across all four terminals.

Sunflowers have been synonymous with Changi Airport since the opening of the Sunflower Garden at Terminal 2 departure transit area in 2002.

It is among the many other gardens at the airport, which provide serene havens for travellers on the go to soak in the nature before their flight.

“Our lush gardens at Changi Airport have always been more than just a feature – they are an experience that embodies the warmth and hospitality of our airport,” enthuses CAG’s senior vice president of airport operations development, Ang Siew Min.

ARTS AND CULTURE FESTIVAL AT HONG KONG INTERNATIONAL AIRPORT

Doing things a little more traditionally this summer is Hong Kong International Airport, which recently launched its HKIA Arts and Culture Festival 2024.

The event, which lasts until October 31, feature a series of art exhibitions showcasing the talent and creativity of

Hong Kong artists while promoting Hong Kong’s unique culture to travellers from around the globe.

Airport Authority Hong Kong (AAHK) has partnered with M+, MobArt Gallery, Art Promotion Office of the Leisure and Cultural Services Department, and Hong Kong Arts Centre to present art exhibitions that highlight the diversity of the local arts scene.

The festival will include four exhibitions spanning diverse themes, from traditional crafts to digital arts. Visitors can personalise their own postcards of Hong Kong street scenes by using stamps made with ‘Lee Hon Kong Kai’ fonts, a signature calligraphy that commonly used in Hong Kong’s signs since 1970s. Visitors can also receive limited-edition luggage stickers designed by local artists.

Elsewhere, there is a series of gongbi paintings, traditional Chinese paintings delicately and exquisitely outlining natural beauties, which have been transformed via multimedia digital technology into dynamic visuals and interactive artworks at the Ground Transportation Centre.

While the airport’s giant digital screen will feature four animated paintings created by local artists and 260 secondary school students

“As the gateway to Hong Kong, HKIA stands as an ideal venue to showcase the diverse cultural landscape of our vibrant city,” said AAHK’s acting CEO, Vivian Cheung.

“The airport has been providing a valuable platform for both established and emerging local artists to share their work with a global audience since 2015. The Arts and Culture Festival will enrich the journey of every traveller passing through the airport.”

WBP NEWS

The latest news and views from World Business Partners across Asia-Pacific and the Middle East.



MACAU OPENING FOR PLAZA PREMIUM GROUP

Plaza Premium Group (PPG) has opened its highly anticipated Plaza Premium First lounge at Macau International Airport.

“Ten years ago, we opened our first lounge at Macau International Airport,” said PPG’s founder and

CEO, Song Hoi-See. “Over the past decade, we have witnessed the growth and evolution of the tourism industry in the city. Through the new lounge, we aim to enhance the journeys for travellers who value curated experiences.”



TAKING SHANGHAI PUDONG TO THE NEXT LEVEL

SITA will be installing its state-of-the-art passenger verification and check-in solutions at Shanghai Pudong International Airport to greatly enhance the experience of travellers through the airport.

It will deploy common-use self-service bag drops (SBD) and kiosks for Pudong Airport’s foreign airlines and their passengers, making the journey through the terminal much easier and efficient.

With the need for faster and easier operations at the airport, SITA has deployed 52 kiosks and 14 SBDs across the airport, allowing international passengers to independently check in early before counters open.

As the next step, SITA will work together with Pudong Airport to help the airport enhance the end-to-end self-services through a low-touch, safe environment, which is also in line with the airport’s digital transformation strategy.

WBP PROFILES



ARCONAS

Location: Canada

Type of business: Equipment

W: www.arconas.com

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SURBANA JURONG CONSULTANTS

Location: Singapore

Type of business: Planning & Construction

W: www.surbana.com

Surbana International Consultants is a leading sustainable urban solutions and infrastructure consultancy. Our expertise is backed by over 50 years’ experience shaping the urban landscape in Singapore – one of the world’s top 10 best cities recognised for urban sustainability.

EMMA

Location: Qatar

Type of business: IT and Communications

W: www.emma.aero

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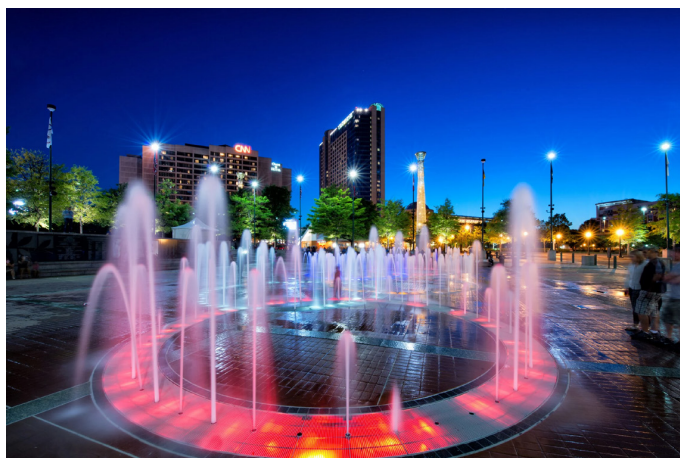
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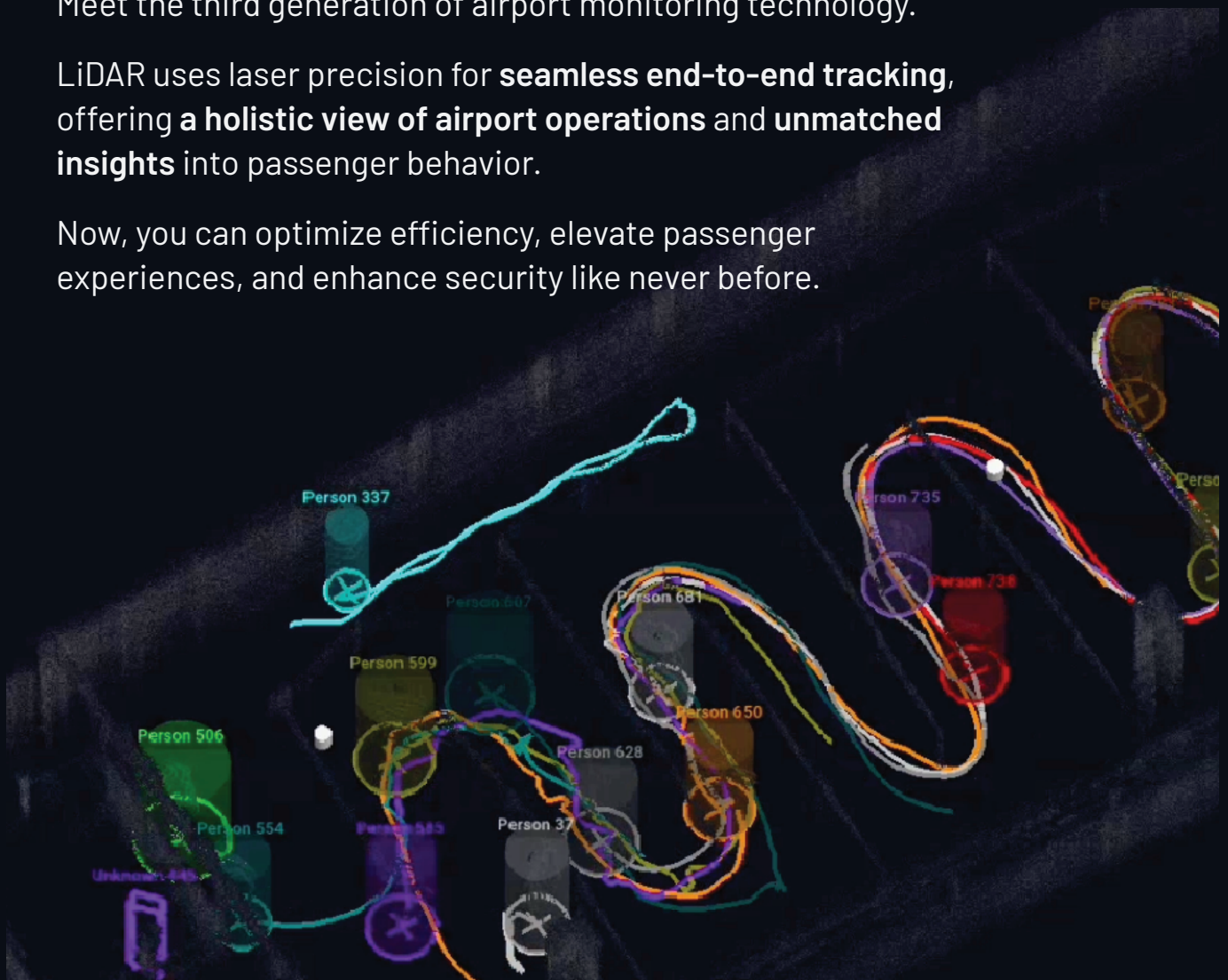
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