
***RECOVERY AND REFORM IN AVIATION- IMPACT OF
COVID-19 ON AVIATION'S STRUCTURE, REGULATION
AND OWNERSHIP***

The 10th European Aviation Conference
30 November — 1 December 2022
Heilbronn, Germany

Evening Reception on Tuesday 29 Nov., 18.30 (Bildungscampus, Building 14)

Day 1 – Wednesday 30 Nov. (Bildungscampus, Building 6)

09.00 - 09.15 Opening Remarks

Raoul Zöllner, Vice Rector Research, Heilbronn University of Applied Sciences

Jens Hujer, Heilbronn University of Applied Sciences

Hans-Martin Niemeier, Bremen University of Applied Sciences

09.15 – 09:45 Welcome addresses

Thomas Strobl, Deputy Minister-President and Minister of the Interior, for Digitalization and Local Authorities, Baden-Württemberg

Translation:

Dear conference participants,

Guests and interested members of the public,

we welcome you most warmly to your 10th European Aviation Conference in the southwest of Germany.

Here, in Heilbronn and Baden-Württemberg, it is above all our rich cultural heritage and nature, from the Black Forest, across Lake Constance, to our large urban industrial and innovation centres that shape us.

For good reasons, Baden-Württemberg is the leading innovation hub within the heart of Europe. Here, world market leaders, hidden champions and strong SMEs are boosting our curiosity to connect with our technological knowledge and our high quality of life, our attitude to life with our aspiration to become a little better every day.

In Baden-Württemberg, we are unifying economy with ecology to create sustainable innovations and making the Länd climate-protection country No. 1 - together.

Whether manufacturing and digitalization, research or electronics, Baden-Württemberg has always been a key location and innovation driver for the German, European and global aviation industry.

Having this said, we wish you exciting discussions, interesting insights and shared moments with your colleagues and the aviation conference community

Yours sincerely

Thomas Strobl

09.15 – 09:45 Welcome addresses

Harry Mergel, Mayor, City of Heilbronn

09.45 - 10.15 Keynote

Alexander Laukenmann, FRAPORT, Head of Aviation

10.15 - 10.45 Coffee

10.45 - 11.45 Session 1: Setting the stage: How have the past three years impacted the aviation industry?

The past three years have been extremely challenging for the aviation sector. Before the longer-term effect of the crisis is considered, it is important to identify the extent of the damage already done.

- What is the extent of the hit taken by the industry? Is it reversible?
- What problems do companies face concerning the fast recovery of the traffic?
- What has been the role of governments in the crisis?

Chair Jody Kositsky, InterVISTAS

Brian Pearce, Visiting Professor Cranfield University, Former Chief Economist IATA

Michael Stanton-Geddes, ACI-Europe

Marc Baumgartner, International Federation of Air Traffic Controllers' Associations,

11.45 - 12.30 Session 2: How should governments rethink their aviation policy in a post-crisis world?

This session, organised by the International Transport Forum at the OECD (ITF), will gather government officials and regulators who will discuss the progress made so far in tackling aviation challenges, and what advice from the expert community would be most helpful.

The deep impact of the Covid-19 crisis on the aviation industry necessitated government support to airlines and airports. As the world emerges from the pandemic, governments need to rethink their aviation policies in light of the changes that have taken place in the sector. In particular:

- What role should governments play in the sector's recovery? Can the benefits of market liberalisation, achieved over the last 30 years, be preserved?
- Are we prepared for the next crisis?
- How can governments mitigate the negative impacts of future crises with a coordinated approach to dealing with cross-border travel?

Chair: Till Bunsen, International Transport Forum at the OECD

Maarten de Lange, Aviation Directorate of the Dutch Ministry of Infrastructure and Water Management

TBA

12.30- 13.45 Lunch

13.45 - 14.30 Session 3 Martin Kunz Lecture

Chair: Peter Forsyth, Monash University

Barry Humphreys, Aviation Consultant BKH Aviation, The Regulation of Air Transport: From Protection to Liberalisation (and Back Again?)

14.30 - 15.45 Session 4: Airlines After the Pandemic

The airline industry had relatively good financial standing at the beginning of the pandemic. However, the impact of the past three years has been devastating, with airlines able to survive enormous financial losses only with the help of governments, shareholder bail-outs, and increased borrowing. This session will aim at answering the following questions:

- Is this the end of liberalisation in air transport?
- Will there be an increase in airline consolidation? Will we see numerous start-ups?
- Will low-cost carriers maintain the market share they have gained during the pandemic?

Chair: William Morrison, Wilfrid Laurier University

Tobias Bunzel, Lufthansa, Frankfurt

Pawel Kampczyk, International Air Transport Association, Geneva

Nicole Adler, Hebrew University, Jerusalem,

Volodymyr Bilotkach, Purdue University

15.45 - 16.15 Coffee

16.15- 17.30 Session 5: Airports - capacity, charges, competition, regulation after pandemic

Airports believe the pandemic's effects will require airport charges to be higher in future. Increased uncertainty about future passenger traffic makes the choice between capacity expansion and more efficient use of existing capacity a matter of considerable importance. Session 5 poses several questions:

- How did airport charges evolve during and after the pandemic?
- Has the pandemic shifted the trajectory of airport traffic growth? What are the implications for future investment and ownership restructures by airports?
- Has the pandemic generated a stronger case for changing the EU slot allocation system?

Chair: Andreas Papatheodorou, CAA Greece, Athens

Jörg Bauer, Lufthansa, Germany

Guillaume Burghouwt, Schiphol Airport Strategist

Dan Elliott, Frontier Economics

Benny Mantin, University of Luxembourg

17.30 - 18.30 Session 6: Should airports be allowed to recover financial losses of the pandemic?

The pandemic caused the closure or near-closure of airports across Europe, and large losses. Airports provide infrastructure and argue that, as they remained available to serve customers, their loss of net

revenue in the period should be able to be recovered in the coming years. Session 6 will consider these questions:

- What has been the extent of financial losses for airports during the 2020-21 pandemic?
- What was the scale of government aid to the airport sector?
- If cost recovery is pursued, who should bear the cost? How could cost recovery be organised?

What role for regulators?

Chair: Cathal Guiomard, Dublin City University

Ernst-Jan Heuten, Authority for Consumer and Markets, The Netherlands

Fabio Soleri, Aeroporti di Roma

Andreas Schweizer, Head of Controlling and Finance, Stuttgart Airport

18.45 Drinks (Bildungscampus Building 6, Aula & Evening Dinner (Bildungscampus, Building 8, Mensa)

Day 2 – Thursday 1 Dec. (Bildungscampus, Building 6)

09.00 - 09.15 Review of Previous Day

Jody Kositsky, InterVISTAS and Hans-Martin Niemeier, Bremen City University of Applied Sciences

09.15 - 10.00 Keynotes

Chair: Cathal Guiomard, Dublin City University

Pieter Cornelisse, KLM, How to cope with Airport Capacity Shortages due to overstrained Labor Market

Henrik Hololei (Director-General for Mobility and Transport, European Commission) interviewed by

Andrew Charlton, Aviation Advocacy & Executive Director ATM Policy Institute

10.00 - 11.30 Session 7 Would Air Traffic Control Reform assist the recovery?

Air Traffic Control has a long history of poor performance. In Europe, the Single European Sky Initiative is at stake. The reform process has halted, Air Navigation Service Providers have not reduced costs significantly in the COVID 19 crisis, and now the losses are to be recovered via higher charges from the airlines. Reform proposals are being made. Some questions are:

- What role should Air Traffic Control play in aiding the recovery of the aviation sector?
- What are the links between ATC cost efficiency and airline performance?
- How can the regulation of the European ATC system be reformed to set incentives for flexibility and resilience?

Chair: Andrew Carlton

Götz Ardey, Director of Corporate and Business Development, Skyguide

Marc Baumgartner, International Federation of Air Traffic Controllers' Associations, Switzerland

Xavier Fron, formerly Eurocontrol

Peter Griffith, Aviation and Maritime, Former Chairman Performance Review Body

Alexander Holzrichter, Lufthansa Group

Hans-Martin Niemeier, Bremen University of Applied Sciences

11.30 - 12.00 Coffee

12.00 - 13.00 Session 8 Fit for 55/ What has been achieved on Decarbonizing Aviation since last year's conference

The European Commission's Fit for 55 regulatory proposals are being finalised. Will they deliver significant change, meet expectations and set the industry on track to reach net zero? What impacts can we expect to see by 2030 on emissions and growth? What happened about promises to address non CO₂ impacts? This session will debate these initiatives and proposals.

- What is the distributional impact? Are the proposals realistic, implementable and cost effective?
- What is planned about compliance, potential market distortions and carbon leakage?
- Can the nascent SAF producers deliver - and sustainably?

Chair: Simon Wright, The Economist

Bill Hemmings, Rosetta Advisory, formerly T&E, Brussels, Belgium

Michele Granatstein, Oxera, Oxford, UK

Antoine Habersetzer, Bauhaus Luftfahrt, Munich, Germany

13.00 - 13.50 Session 9 The Mike Tretheway Debate:

Be it resolved that the last three years have fundamentally, significantly and irreversibly altered air transportation

The focus will be on the impact of the last three years on the aviation industry and the implications for its future structure and regulation.

Chair: Ian Kincaid, InterVISTAS, Vancouver, Canada

Keith Mason, Cranfield University

Andrew Charlton, Aviation Advocacy & Executive Director ATM Policy Institute

Brian Pearce, Visiting Professor Cranfield University, Former Chief Economist IATA

Ian Douglas, University of New South Wales Sydney, Australia

13.50-14.00 Closing Remarks

14.00 Lunch

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