



Customer Relations Programme 2018





Thank you for taking time to meet with us today

- We would like to give you an update on IAA
- We hope to gain a better understanding of how we can improve the services we provide to your members
- We hope you find it useful

We would like to tell you about our Operations in Irish Airspace and at Dublin, Cork & Shannon Airports, particularly in the areas of:

- Safety
- Value for money
- Service Delivery
- Innovation
- Customer Service





Safety is Critical to Passenger Confidence Also, it's The Right Thing To Do

Safety is No.1 Priority for all of us at IAA

- Ireland ranked 2nd in Europe for Safety by ICAO
- IAA already meets EC's 2019 Safety Targets
- IAA ranked 1st by CANSO for Safety Maturity

But, we strive to improve - continuously



No. 1 Priority for all at IAA

- Focus on Safety of System
- Mitigate risk wherever possible
- Monitor trends on 5 Key Safety Performance Indicators
- Always with a view to Continuous Improvement

Runway
Incursions

Separation
Minima
Infringements

Level Busts

Deviation from
ATC Clearance

Unauthorised
Penetration of
Controlled
Airspace

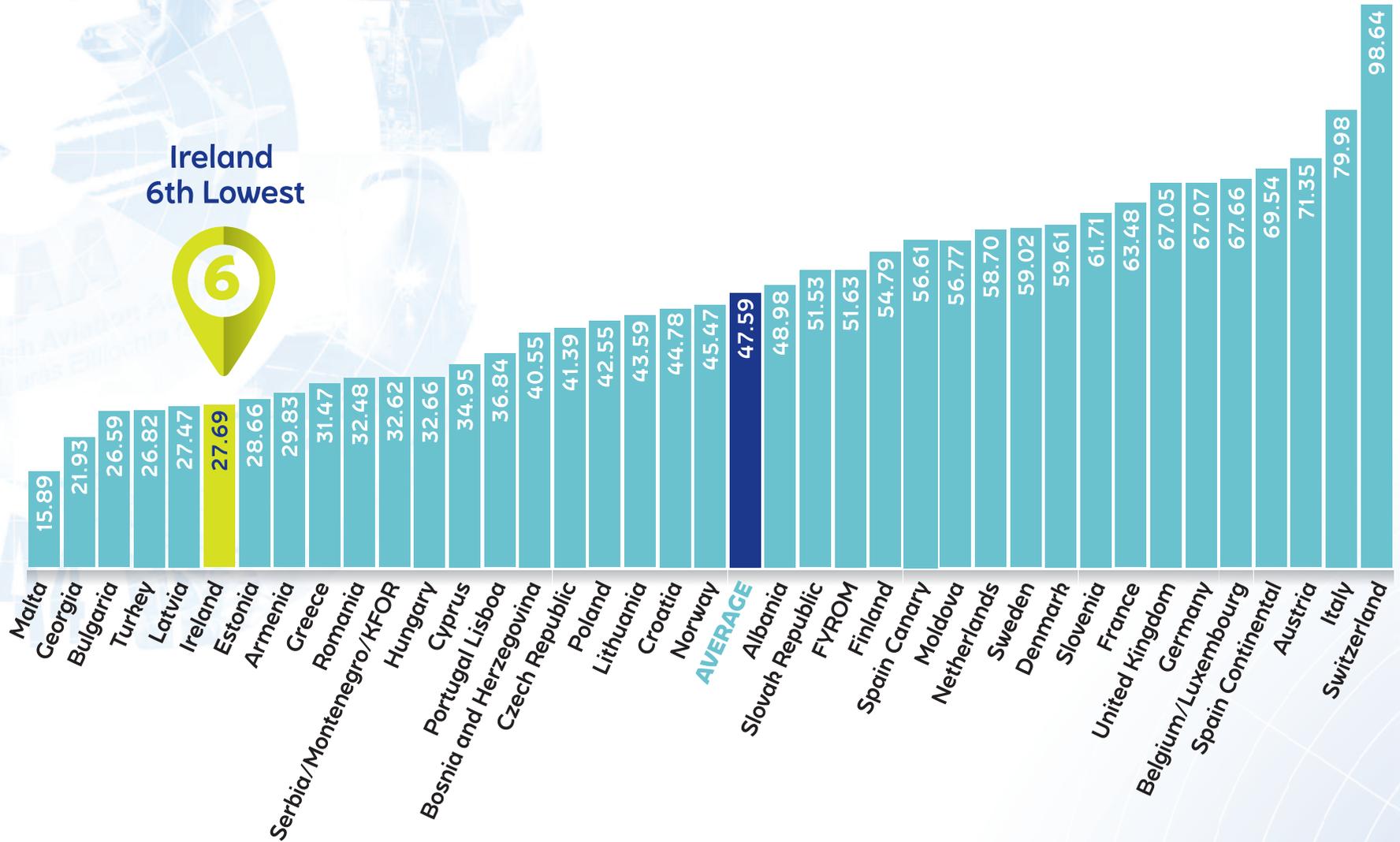
Safety Performance



IATA Members

KSPI	Number	Rate per 1,000 Movements
Runway Incursions	9	0.007
Separation Minima Infringements	1	0.004
Level Bust	40	0.034
Deviation from ATC Clearance	284	0.458
Unauthorised Penetration of Controlled Airspace	27	0.005

2018 En-Route User Charges



*Source: EUROCONTROL



User Charges



RP2 En-Route			RP2 Terminal		
Year	Forecast €	Actual €	Year	Forecast €	Actual €
2015	29.60	29.60	2015	168.17	156.92
2016	28.98	29.67	2016	172.64	180.18
2017	29.11	29.54	2017	171.02	171.69
2018	28.98	27.69	2018	168.14	151.75
2019	28.28	28.34*	2019	164.54	152.74*

North Atlantic HF Comms					
Year	2015	2016	2017	2018	2019
Actual €	45.00	45.00	45.00	45.00	45.00*

Irish User Charges

- En-Route & Terminal rates meet RP2 targets**
- Est. rates include impact of adjustments as per RP2 Performance Plan including:
 - Traffic risk sharing
 - Inflation
 - Capacity Incentive (not paid in 2018 but payable in 2019)
 - E.C. Grant repayments

*2019 rates are estimates. Updates due mid-June 2018

**North Atlantic HF Comms not governed by EC's Performance Scheme

Traffic Risk Sharing



RP2 Traffic Risk Sharing Scheme

Variance from Forecast	Impact on Revenue
2%	No Risk Sharing Applies
>2% but <10%	30% to IAA & 70% to Airlines
>10%	0% to IAA & 100% to Airlines

**> €14
Million**

IAA will return over €14 Million to Customers in 2019 through traffic risk sharing and adjustments for 2017



Customer Airline Revenue to IAA

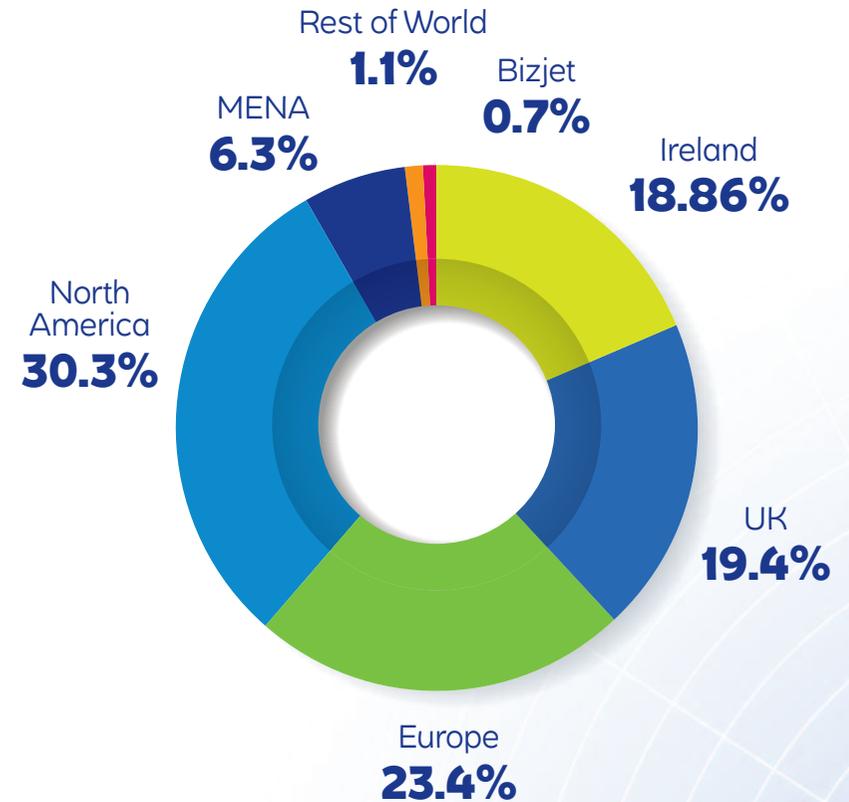
Year	2015	2016	2017
En Route	121,992,686	130,304,861	130,195,952
NAT HF Comms	19,677,418	21,095,820	22,075,470
Terminal	23,498,092	28,426,573	29,480,741
Total	165,168,196	179,827,254	181,752,163

Revenue by Region



CRM Programme Participants 86% IAA Revenue

Customer Region by Revenue	
Region	% IAA Revenue
Ireland	18.8%
UK	19.4%
Europe	23.4%
North America	30.3%
MENA	6.3%
Rest of World	1.1%
Bizjet	0.7%



2017 Top 50 Customers



Rank	Customer	2017 Revenue	% IAA Total	Rank	Customer	2017 Revenue	% IAA Total
1	British Airways	€17,126,793	10.4%	26	Easyjet	€1,113,507	0.7%
2	Aer Lingus	€15,476,827	9.4%	27	Air Canada Rouge	€1,090,076	0.7%
3	Ryanair	€14,518,408	8.8%	28	Etihad	€1,025,435	0.6%
4	Delta Air Lines	€13,550,689	8.2%	29	Ethiopian Airlines	€1,007,465	0.6%
5	United Airlines	€13,350,670	8.1%	30	UPS	€1,003,152	0.6%
6	American Airlines	€11,023,322	6.7%	31	Condor	€996,448	0.6%
7	Lufthansa	€8,600,866	5.2%	32	Austrian Airlines	€855,907	0.5%
8	Air France	€7,572,128	4.6%	33	Saudia	€811,706	0.5%
9	Virgin Atlantic	€6,944,696	4.2%	34	Atlas Air	€772,796	0.5%
10	Air Canada	€6,091,381	3.7%	35	Norwegian Air Intl	€687,524	0.4%
11	KLM	€4,830,673	2.9%	36	EIAl	€668,089	0.4%
12	TUI Airways	€2,811,902	1.7%	37	Monarch Airlines	€643,818	0.4%
13	Swiss	€2,808,997	1.7%	38	Lufthansa Cargo	€618,136	0.4%
14	Emirates	€2,564,934	1.6%	39	Brussels Airlines	€602,893	0.4%
15	Thomas Cook Airlines	€2,494,571	1.5%	40	Wow Air	€599,926	0.4%
16	Turkish Airlines	€2,091,931	1.3%	41	TUI Ned. Arkefly	€593,716	0.4%
17	Jet2.com	€2,063,860	1.3%	42	SAS	€588,369	0.4%
18	Stobart Air	€2,031,176	1.2%	43	Kuwait Airways	€585,776	0.4%
19	Air Transat	€1,935,029	1.2%	44	Eurowings	€579,884	0.4%
20	Norwegian Airshuttle	€1,855,950	1.1%	45	Singapore Airlines	€577,982	0.4%
21	Qatar Airways	€1,841,532	1.1%	46	Kalitta Air	€571,945	0.3%
22	FedEx	€1,639,544	1.0%	47	Aeromexico	€547,450	0.3%
23	Air Berlin	€1,268,274	0.8%	48	Flybe	€545,738	0.3%
24	Cargolux	€1,196,441	0.7%	49	Westjet	€525,758	0.3%
25	Alitalia	€1,144,950	0.7%	50	CityJet	€525,360	0.3%

2017 Traffic Performance



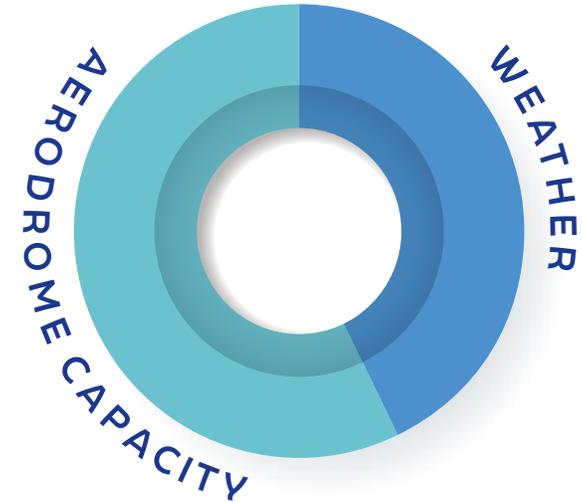
 2017 Traffic		
	Flights	% Change
En Route	343,977	+ 0.8%
NAT HF Comms	500,684	+ 5%
Terminal	255,019	+ 3.3%



Delay Performance



2017 Delay	
	Average Minutes Delay per Flight
En Route	0
Terminal	0.5



Average Taxi Times at Dublin down by 2 minutes 2017 v 2016**
But
Continuing traffic growth with no improvement of ground infrastructure means an increase is likely for S'18

2017 Terminal Delay*	
Reason	Minutes of Delay
Weather	5,220
Aerodrome Capacity	6,595
Total	11,815

**Source: Dublin Airport

*Source: EUROCONTROL



Shannon UIR / FIR (Irish Controlled Airspace)		
	2016	2017
No. Flights	608,596	619,185
Avg. Distance (KM)	356.36	349.59
Avg. Time (mins)	28.56	28.15
Avg. Delay (mins)	0	0
Avg. Cost / Flight (€)	217.89	213.07
Avg. Cost / KM (€)	0.61	0.61



North Atlantic HF Comms (SHANWICK)		
	2016	2017
No. Flights	476,731	500,684
HF Contact	841,208	851,162
Cost per Flight (€)	45	45



Flights by Type 2016

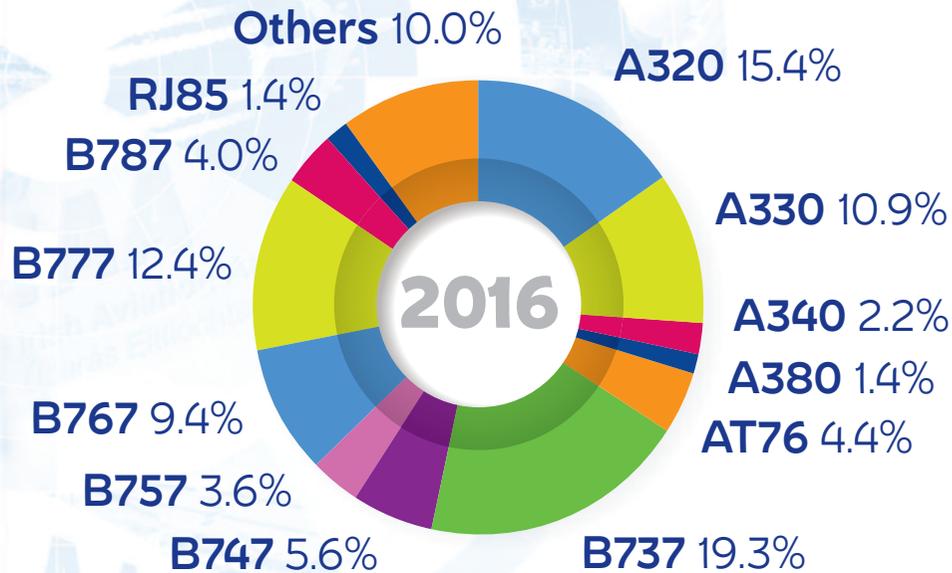
A320	93,965	15.4%
A330	66,355	10.9%
A340	13,239	2.2%
A380	8,614	1.4%
AT76	26,502	4.4%
B737	117,708	19.3%
B747	33,851	5.6%
B757	22,063	3.6%
B767	57,174	9.4%
B777	75,557	12.4%
B787	24,241	4.0%
RJ85	8,563	1.4%
Others	60,764	10.0%
	608,596	

Flights by Type 2017

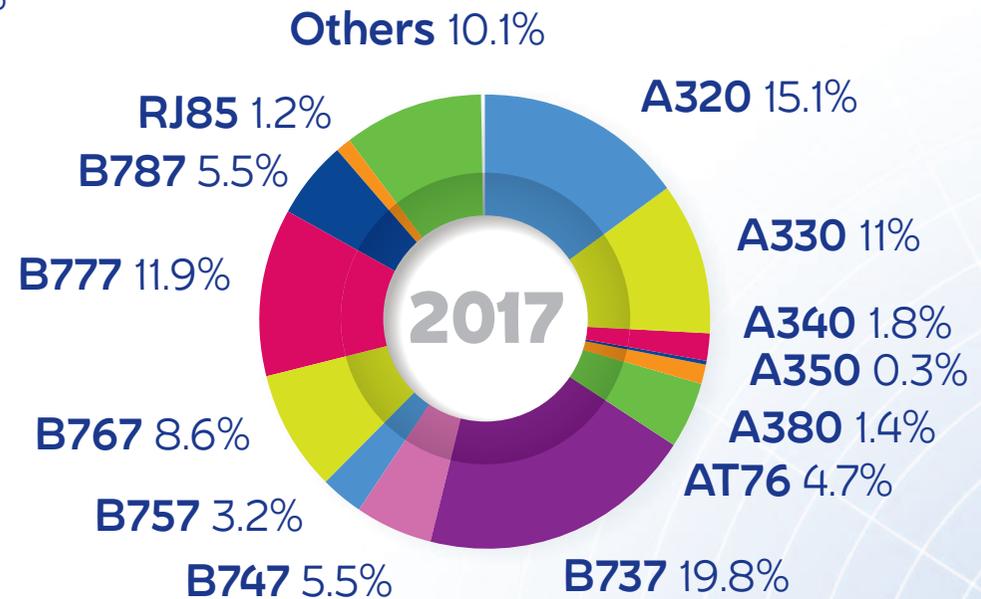
A320	93,648	15.1%
A330	68,288	11.0%
A340	10,896	1.8%
A350	1,578	0.3%
A380	8,719	1.4%
AT76	29,022	4.7%
B737	122,733	19.8%
B747	33,770	5.5%
B757	19,542	3.2%
B767	53,033	8.6%
B777	73,493	11.9%
B787	34,005	5.5%
RJ85	7,703	1.2%
Others	62,755	10.1%
	619,185	



Flights by Type 2016



Flights by Type 2017





2017 – All effort focused on Service Delivery

- Traffic far above forecast. Staffing was planned for forecast traffic levels.
- Additional pressure on staffing – retirement & more lucrative opportunities abroad. Long lead time in recruiting new Controllers / Engineers.
- New staff coming on stream 2018 & 2019.
- Some initiatives to increase capacity of Dublin's runway & improve efficiency of Shannon FIR/UIR

A-CDM at Dublin Airport

- Trials commenced April 2018. Some technical issues across all stakeholders. Working together for resolution.



Dublin Runway Initiatives for 2018/2019

- Reduced Departure / Arrival Separation – 2 extra movements per hr by Q4 2018.
- Reduced departure separation – down to 0.85NM – 2 extra movements per hr by Q2 2019.

New Dublin Tower

- Building complete Q1 2019. Operational on current RWY Q3 2020. Parallel RWY operations 2021.

Remote Towers

- Re-location of RTC to Shannon by end 2018. Shannon Tower H24 from RTC by Q4 2019.

Contingency Centre

- Operational Q2 2019. Delayed by bankruptcy of key supplier. Opportunity to upgrade to IP spec. Future proofs the Centre.



KPI	Status	Detail
Safety	Fully Compliant	<ul style="list-style-type: none"> ■ Effectiveness of safety management (EoSM) - 2019 target fully achieved by 2015 and maintained in 2016. ■ Application of Risk Assessment Tool (RAT) for incident severity classification - 100% application in 2016. ■ Just Culture - Fully Compliant
Cost Efficiency	Fully Compliant	<ul style="list-style-type: none"> ■ 2016 En-route user charge €29.67 (nominal) - Fully compliant with RP2 Performance Plan ■ 2016 Terminal user charge €180.18 (nominal) - Fully compliant with RP2 Performance Plan
Delay	Fully Compliant	<ul style="list-style-type: none"> ■ 2016 actual ATFM delay was 0 minutes per flight, substantially below the target of 0.13 minutes
Environment	Fully Compliant	<ul style="list-style-type: none"> ■ Combined target with UK of 3.27% inefficiency for en-route horizontal flight efficiency. Actual for Ireland is 0% as Free Route Airspace is as efficient as it is possible to get

*Source: PRB UK/Ireland FAB 2016 RP2 Monitoring Report. 2017 report not yet published



New Survey Format for 2017

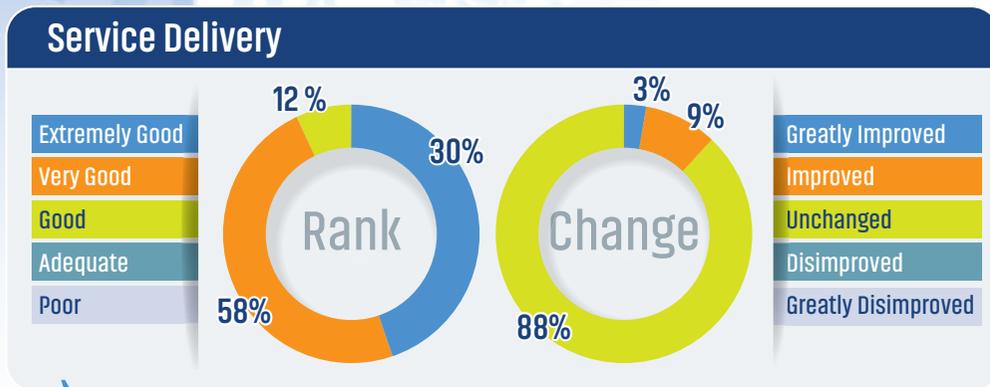
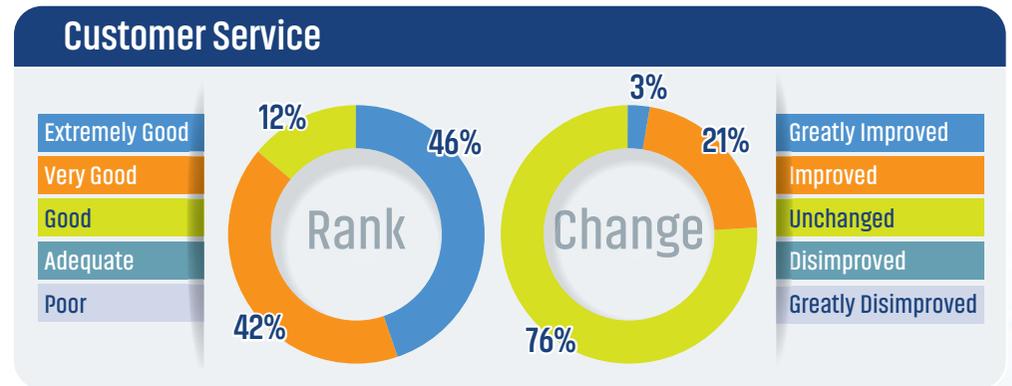
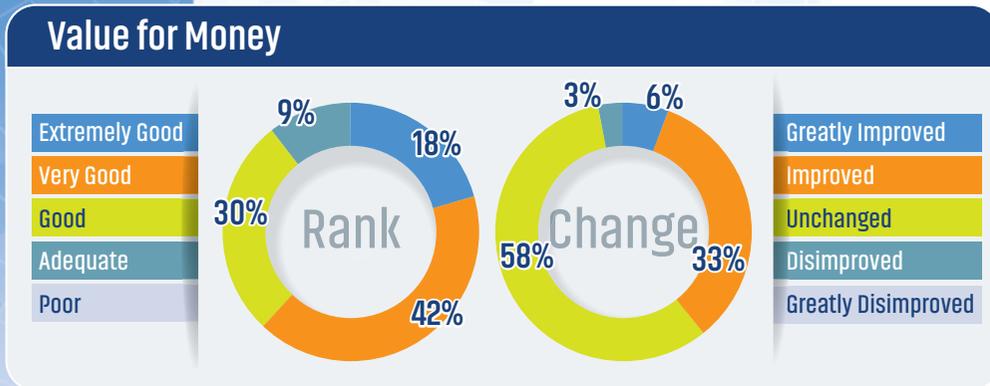
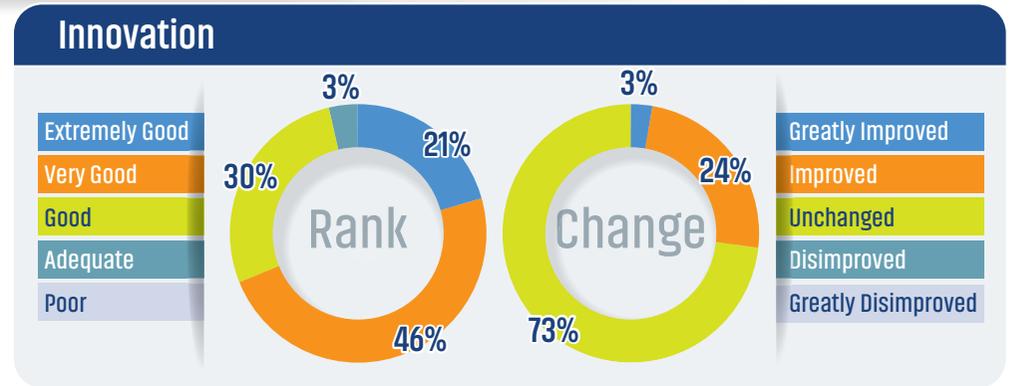
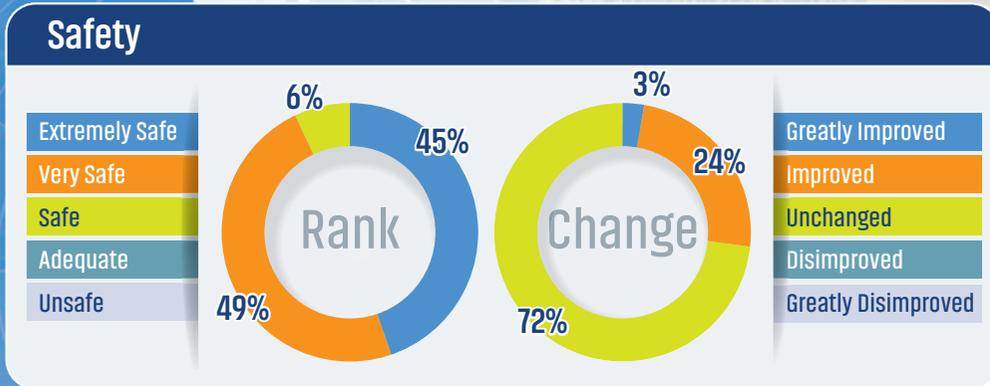
- Independent survey conducted by Schuman Associates
- Asked Customers for opinions on IAA Operation
- Measured Attitudes, Perception of Change and overall Customer Satisfaction
- Feedback published in Annual Report

Thank you for taking the time to complete the survey

Participating Airlines

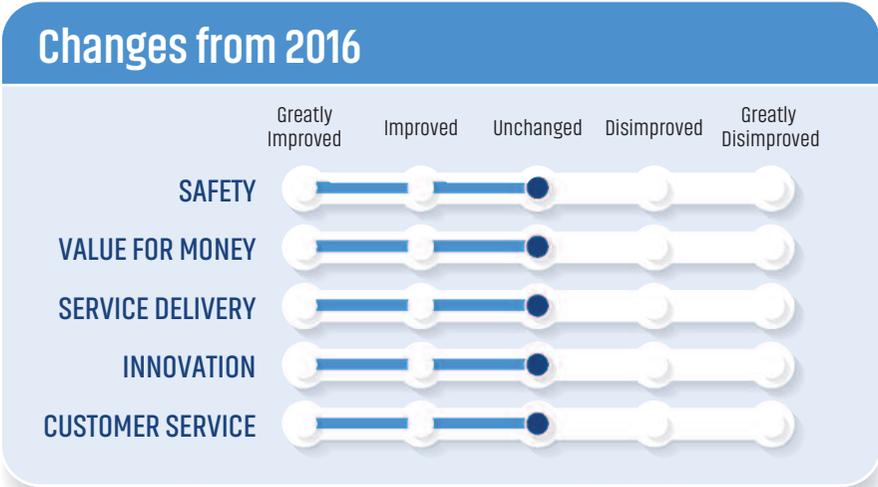
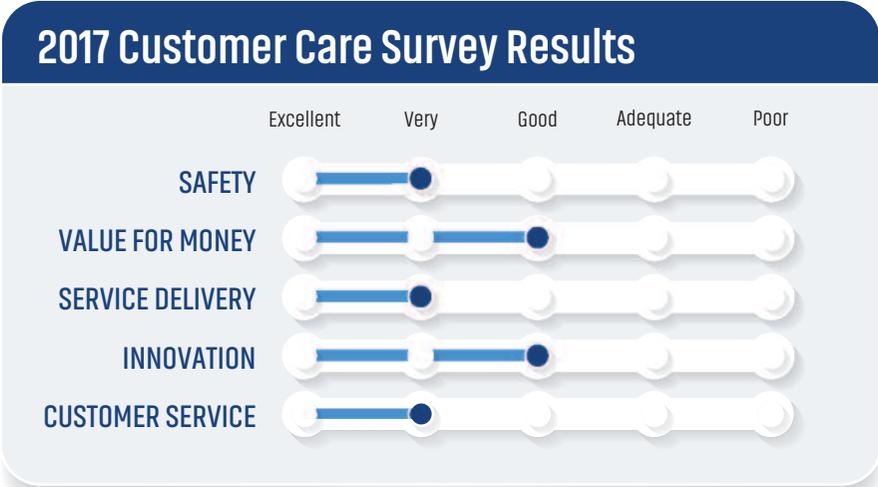
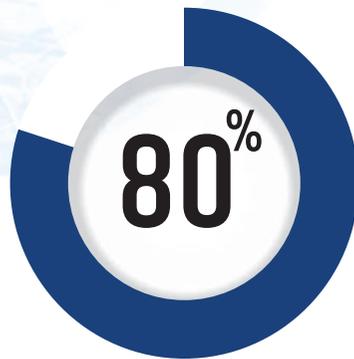


Feedback by Category





Overall Customer Satisfaction





- Safety is Number 1 Priority for All at IAA
- IAA is a Customer Driven ANSP
- IAA Delivers High Quality, Value for Money ATM Services
- > €14 Million will be returned to Customers in 2019 via Risk Sharing
- Focus on Continuous Improvement



THANK YOU
for your time
and interest

