



FAST FORWARD

STREAMLINING TRANS-TASMAN AIR TRAVEL

September 2017

In partnership with



ABOUT TTF

The Tourism & Transport Forum (TTF) is the peak industry group for the Australian tourism, transport, aviation and investment sectors. A national, member-funded CEO forum, TTF advocates the public policy interests of the leading corporations and institutions in these sectors.

TTF uses its experience and networks to influence public policy outcomes and business practices and to assist the delivery of major tourism, aviation and transport-related infrastructure projects.

With the slowing of the resources sector and the decline of many traditional manufacturing industries, the visitor economy has become the new hero industry for economic growth.

A key driver for our future prosperity is international tourism, powered largely by the Asia Pacific region, which now accounts for seven of our 10 top source markets.



ABOUT AIRBIZ

Airbiz specialises in international aviation consultancy. Our clients include airport owners, operators, investors, airlines, government agencies and other aviation stakeholders. The Airbiz team consists of airport and terminal planners, business analysts, aviation marketing specialists, project facilitators, simulation experts and creative strategists.

Team members are renowned for their lateral thinking resulting in innovative and cost effective outcomes. The Airbiz team has accumulated over 30 years' experience in the aviation industry and has successfully completed over 2000 projects in 50 countries, on five continents.

Airbiz is an active contributor and World Business Partner of Airports Council International (ACI). Airbiz is recognised globally as a specialist aviation industry advisor that delivers tailored solutions for aviation clients.



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MESSAGE FROM THE CEO

With the end of Australia's mining boom and the decline of many traditional manufacturing sectors, the visitor economy has become the new hero industry on which we are pinning our hopes for growth.

A key driver of our future is international tourism, powered largely by the Asia Pacific region, which now accounts for seven of our top 10 source markets.

But as we continue to enjoy, and increasingly rely upon, record visitor arrivals, we are quickly discovering there are also costs associated with success.

The visitors we hoped for are now arriving in ever-larger numbers, but this is resulting in lengthening queues and waiting times in our international airport terminals, adversely influencing the first and last impressions which visitors have of our country.

It is impractical and frankly unaffordable to continually build or extend infrastructure to absorb the growth.

We need to find other ways of reducing the queues, improving asset productivity and continually enhancing the visitor experience, without compromising and preferably improving security.

One way to do this is to remove from lines the vast majority of travellers who don't need further checks, in order to focus on the very few who do, by leveraging the latest screening technology.

To this end, we have asked the global aviation consultancy Airbiz to explore scenarios to streamline border processing in our airports.

The most obvious market in which to test such reforms is the trans-Tasman, as New Zealand and Australia are not only geographically and culturally close, but also deliver more visitors to each other than any other market.

An earlier TTF report produced by Airbiz identified the bottlenecks at Australia's international airports, and highlighted global best practice in dealing with such issues.

This discussion paper takes the next step, specifically and independently exploring opportunities to streamline border processing on both sides of the Tasman.

It also examines the challenges and presents scenarios which, if successful on the Tasman, potentially could be adapted, in whole or in part, for other trusted, large-volume markets such as China, in order to improve the customer experience in Australasian airports.

But most importantly, this paper serves to stimulate discussion of the scenarios for border reform, technological and regulatory opportunities and challenges, and lateral solutions for the future.

Margy Osmond

Chief Executive Officer,
Tourism & Transport Forum (TTF)



PURPOSE OF THIS REPORT

Trade and travel between Australia and New Zealand are critically important. The two countries are intrinsically linked and increasingly integrated socially, economically and legislatively benefiting not only their own citizens and economies, but also their interactions with the global community.

Governance and regulatory environments in both countries are increasingly aligned and provide the basis for close collaboration between their governments and agencies across a range of industries and issues.

In August 2014, TTF published a paper “Bringing our Neighbour Closer”, which recommended a range of reforms to border and immigration procedures, with a view to unlocking latent travel demand between Australia and New Zealand.

A key aim of the report was to facilitate a more domestic-like travel experience for trans-Tasman journeys through increased automation of border controls and the introduction of self-declarant green channels on arrival, to help cut overall travel times and speed passenger movement through major airports.

TTF is working closely with aviation planning specialist Airbiz, a key industry thought-leader, to further develop the rationale for reform by exploring specific options for streamlining the trans-Tasman air travel experience.

This report is focused on how best to deliver a smarter, better experience for passengers flying between Australia and New Zealand, while also improving the efficiency of airports, airlines and border management authorities. It offers three scenarios which are intended to drive discussion.

Although the report is also likely to spark debate on a range of related topics, it is deliberately focused only on identifying and describing technology and different thinking on infrastructure use, which will enable change, examining global best practice, and proposing for consideration scenarios for reform. It specifically does not address the regulatory, political or commercial issues associated with change.

ACKNOWLEDGEMENT

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- Adelaide Airport
- Air New Zealand
- Auckland Airport
- Australian Department of Immigration and Border Protection
- Australian Department of Infrastructure and Regional Development, Office of Transport Security
- Brisbane Airport
- Christchurch Airport
- Gold Coast Airport
- Melbourne Airport
- New Zealand Aviation Security Service
- New Zealand Civil Aviation Authority
- New Zealand Customs Service
- New Zealand Ministry of Primary Industries
- New Zealand Ministry of Transport
- Perth Airport
- Qantas Airways
- Queenstown Airport
- Sydney Airport
- Virgin Australia Airlines
- Wellington Airport



CONTEXT

With the notable exception of our sports rivalry, few nations enjoy relationships as close as Australia and New Zealand. Beyond our common heritage and the military ties which spawned the ANZAC partnership, we have developed and continually evolved a sophisticated commercial and social alliance, beginning in 1922 with a formal agreement to trade with each other.

That agreement gained an unanticipated but significant boost just six years later when two pioneering Australian aviators, Charles Kingsford Smith and Charles Ulm – fresh from achieving the historic first flight across the Pacific Ocean – undertook the first flight across the Tasman Sea, journeying from Richmond, north of Sydney, to Wigram Airfield near Christchurch in a time of 14 hours, 25 minutes – five minutes longer than it now takes to fly nonstop from Melbourne to Los Angeles.

In doing so, not only did Kingsford Smith and Ulm make aviation history for the second time in a year. They also cleared the way for scheduled flights between Australia and New Zealand, which started just over a decade later in 1940, when Tasman Empire Airways Limited, the predecessor to Air New Zealand, commenced flying boat services between Auckland and Sydney, initially once a week.

In its first year TEAL completed 130 trans-Tasman flights. Now, an average of 128 aircraft cross the Tasman every day, linking nine airports in Australia and five in New Zealand across 23 city pairs.

By frequency of flights, nine of New Zealand's top 10 international routes are to Australian airports, while three of Australia's top 10 routes are to New Zealand. The volume of seat capacity between the countries ranks 33rd globally, more than Singapore-Malaysia or even USA-China.

Not surprisingly, Australia and New Zealand are each other's top source markets for international visitors, though this year China is expected to overtake New Zealand as Australia's biggest market.

In the year to April 2017, 1.35 million visitors arrived in Australia from New Zealand, equating to almost 30 per cent of New Zealand's population, or the population of Auckland, while Australia and Norfolk Island delivered 1.43 million visitors to New Zealand, just over the population of Adelaide.

Trade in merchandise and services between Australia and New Zealand was valued at AUD\$24.5 billion in FY2016, and today Australia is New Zealand's second-largest trading partner, while New Zealand is Australia's sixth largest partner, and commerce continues to grow.

In 1983, the two governments signed the groundbreaking Closer Economic Relations Trade Agreement (CER), one of the world's most liberal and mutually-beneficial bilateral deals, and the foundation for even more cooperative reforms.

By 1990, tariffs and quotas were eliminated from trans-Tasman trade, and since then agreements have been reached on other complex issues including food standards, professional qualifications, superannuation portability, social security and taxation.



*The market for two-way air travel between Australia and New Zealand is **significant, mature, diverse and low risk**. It facilitates business and leisure travel and unites families and friends. It enables international visitors to the Australasian region to visit both countries with ease. It supports tourism, economic development and social cohesion for both populations.*

*Two-way trade between Australia and New Zealand is significant. In FY16 Australia valued the market at **\$24.5 billion**, split evenly between imports and exports.*

Continued investment in streamlining the trans-Tasman passenger experience is critical to the efficient operation and smooth growth of the social and economic partnership of Australia and New Zealand.

Australians and New Zealanders are also able to live and work in either country, and in 1996 a Single Aviation Market was created, enabling airlines of both nations to operate across the Tasman without capacity or frequency restrictions, and to access each other's domestic markets as if they were one.

But despite these world-leading reforms and concessions, every traveller between Australia and New Zealand still needs to be processed at the border at both ends of their journey.

Data produced by Australia's Bureau of Infrastructure and Transport Economics shows that in the year to November 1996, when the Single Aviation Market was activated, there were 2.58 million air passenger journeys between Australia and New Zealand. By the end of November 2016 – 20 years later – that number had increased to almost 6.97 million journeys, up 170 per cent. Most of these passengers were Australian or New Zealand citizens.

The number of flights operated across the Tasman increased by an even greater rate, from 14,102 in the year to November 1996, to 45,440 in the year ended November 2016, up by over 220 per cent. In 2017 there will be approximately 47,000 flight movements.

In so many ways, the relationship between Australia and New Zealand is economically and socially seamless and advanced.

The next step is to address, as a matter of urgency, trans-Tasman border management, as the scale and rate of growth in travel and trade continues to seriously impact airports, border protection agencies, airlines and, most importantly, travellers.

This report explores opportunities offered by the power of technology to evolve a smarter, better way to streamline air travel across the Tasman, and potentially using this experience as a template for improving other markets.



Air New Zealand

128 flights a day, 47,000 aircraft movements per year and 23 city pairs link five airports in New Zealand to nine airports in Australia, served by 10 airlines.

Air New Zealand is the largest single carrier with **40 flights per day**, Virgin Australia has 24, Qantas Group (Qantas and Jetstar) have 48 combined and Emirates has 4 roundtrip Airbus A380s.

New Zealand is Australia's **#6 trading partner**.

Australia is New Zealand's **#2 trading partner**.

THE FIRST SCHEDULED FLIGHT

The first scheduled flight across the Tasman departed Auckland at 6am on Tuesday 30 April, 1940, bound for Rose Bay on Sydney Harbour. It was operated by Tasman Empire Airways Limited (TEAL), the predecessor to Air New Zealand, using the Shorts S30 Empire flying boat 'Aoteroa' (land of the long white cloud).

The aircraft carried nine passengers, plus cargo and mail, and the low-altitude journey reportedly took nine hours, at a cruise speed of just 164 miles per hour.

The return flight departed Sydney Harbour two days later, leaving at 4am.

For the first four months flights operated weekly, before increasing to three per fortnight, and by the end of its first year TEAL had made 130 trans-Tasman flights, and carried 1,461 passengers.

Today, there are 128 flights per day on 23 routes across the Tasman, with the average New Zealand-eastern Australia service taking three hours 45 minutes.

OUR VISION

Our research and analysis, supported by insights gained from stakeholder discussion, have formed the basis for our vision of what could be achieved as outcomes of concerted “whole of industry” collaboration and efforts. These include:

For passengers:

- Simplified airport experiences
- Shorter journey times across the Tasman
- Easier onward connections between trans-Tasman and domestic flights
- Potentially lower cost of travel

For governments and border agencies:

- Enhanced protection of borders through improved decision-making, as a result of receiving better-quality passenger declarations pre-departure
- More productive use of border resources, to focus on intelligence and border protection
- Opportunities for collaboration through trans-Tasman resource sharing

For airlines:

- Time and cost efficiencies at some airports by eliminating the need to tow aircraft between domestic and international terminals
- Better utilisation of aircraft with reduced turnaround times potentially enabling more flown sectors per day, contributing to lower fleet ownership and operating costs
- Potential for some airlines to switch aircraft between trans-Tasman and domestic sectors from the same integrated domestic and international terminal
- Potential improvements in aircrew productivity for some airlines through shorter trans-Tasman turnaround times, or ability to create rosters which enable aircrews to fly both domestic and trans-Tasman sectors in a single shift

For airports and airlines:

- Enhanced competitiveness of airports and airlines due to improved hubbing and connectivity, resulting in reduced minimum connection times
- Improved efficiency and reduced costs for provision and operation of terminals as more traffic potentially, is able to operate through simpler integrated common terminals catering for domestic and pre-cleared operations that are lower cost than full scale international terminals
- Less congestion in current international terminals
- More gate availability in international terminals due to faster turnaround of trans-Tasman flights or transfer of some flights to integrated domestic and international terminals

For national economies:

- Economic benefits through increased mobility between our two countries and more efficient utilisation of resources.



***Streamlined, simplified journey
enabled for the priority benefit
of travellers.***

Enhanced protection of borders.

Fewer touchpoints.

No queues.

No duplication of processes.

*Improved utilisation of aircraft with
reduced turnaround times and
ability to swing between Tasman
and domestic sectors, contributing
to **lower fleet ownership** and
operating costs.*

PREVIOUS INITIATIVES

1973 TRANS-TASMAN TRAVEL ARRANGEMENT

The Trans-Tasman Travel Agreement was implemented in 1973, granting permission for Australians and New Zealanders to work and indefinitely reside in either country.* Since 1994, and subject to health and character considerations, both nations have automatically granted electronic visas to each other's citizens, without further administrative requirements, enabling their continued free movement across the Tasman.

1992 AVIATION REFORM PROPOSAL

In 1992, Australian Prime Minister Paul Keating promoted an aviation reform package which included the concepts of a Single Aviation Market and a common border for Australia and New Zealand, to be achieved by 1994. An underpinning goal of the reforms was to permit each country's airlines to enter into the domestic markets of the other.

The common border concept also envisaged eventual removal of border processing requirements between the two countries.

Task Forces examining the proposals specifically noted the desirability of common inter-connected border control systems to facilitate immigration pre-clearance at departure airports and concluded that the objectives were generally feasible. However, it was identified that crucial policy decisions would be required in respect of common visas, biosecurity and the movement of endangered species and there would be infrastructure challenges to segregate cleared and un-cleared passengers.

The governments of both countries were unequivocal in stating that political union was not under consideration.

While the Single Aviation Market aspects progressed, the common border proposals foundered on issues of sovereignty, common visas and the complexity of biosecurity requirements.

1996 SINGLE AVIATION MARKET

This ground breaking decision enabled airlines of Australia and New Zealand to fly as often as they wished, without capacity or route restrictions, between and within the two countries, as if they were one market. Subject to their own nations' agreements with Australia and New Zealand, other airlines were also able to fly trans-Tasman, providing significant competition and options for air travellers. But while restrictions on airline operations were eased, there was no parallel streamlining of passenger travel between the two countries, even for their citizens.

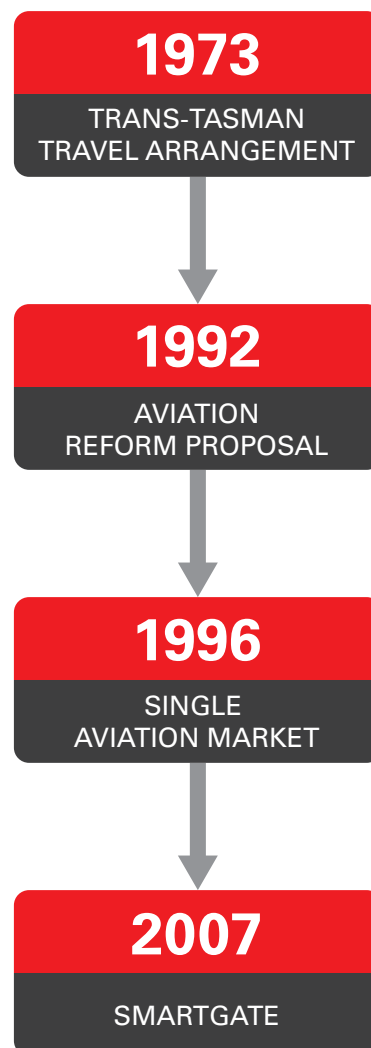
2007 AUTOMATED BIOMETRIC BORDER CONTROLS (SMARTGATE)

SmartGate is an electronic border control system progressively introduced in Australian airports from 2007, and in New Zealand airports from 2009. The system is applied to both departure and arrival border processing.

SmartGate is an e-gate device that reads biometric information on a microchip in a passenger's passport, checks for alerts in border agency databases, confirms the passenger's identity through facial recognition and clears the passenger to enter or exit.

A significant factor in the successful implementation of SmartGate has been the close collaboration between the then Australian Customs and Border Protection Service (now the Australian Border Force) and New Zealand Customs Service.

This close working relationship augurs well for future initiatives to streamline border processing, including possible pre-clearance.



*Providing the individual is a citizen of Australia or New Zealand (or permanent resident of Australia), with valid travel documentation; and Meets specific character and health requirements

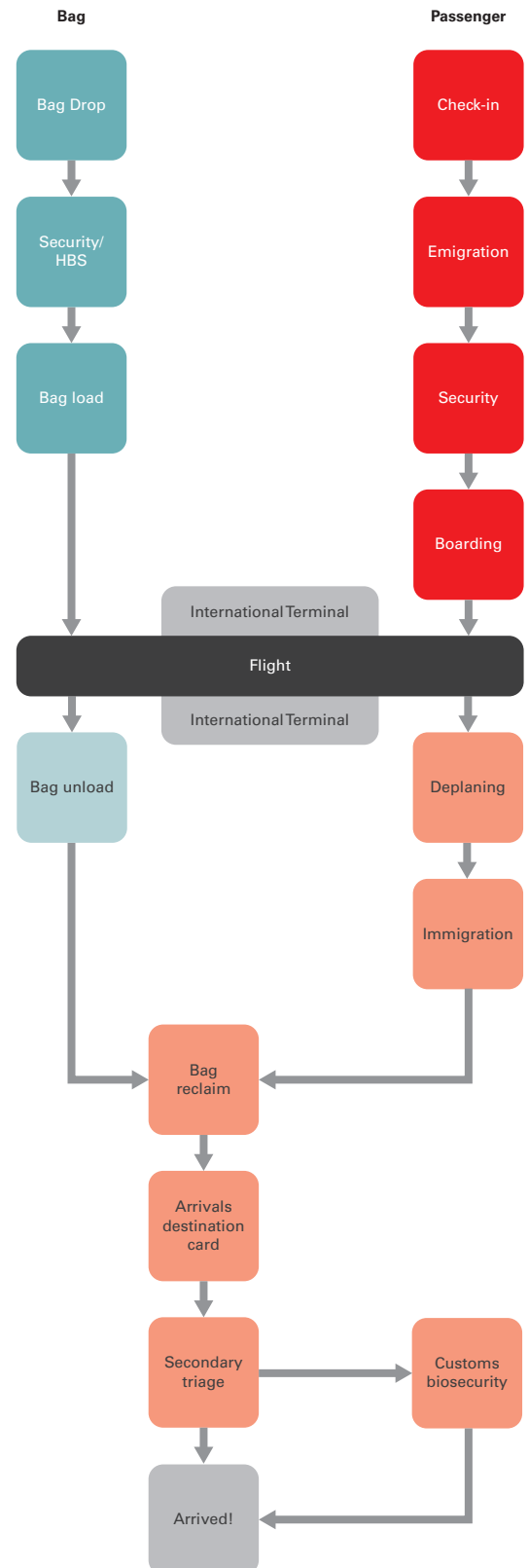
CURRENT TASMAN JOURNEY

Previous initiatives undertaken in improving trans-Tasman travel have incrementally shortened the journey for most of today's passengers as they fly between Australia and New Zealand. These initiatives, including online and mobile check-in, self-service bag tagging kiosks, automated bag drops and SmartGates, have provided passengers automation for a number of the steps in the journey through airports.

However, this automation has simply reduced the processing time of steps within the journey, rather than removing steps altogether and expediting the overall journey. Even when passengers check-in online and use an automated bag drop at the airport, the current process still requires them to obtain a paper boarding pass, to present their passport and booking information to an airline check-in agent to confirm identification, or to duplicate the check-in at a kiosk.

In July 2017, Australia removed the requirement for passengers to manually complete departure cards, though this process remains in New Zealand.

Security screening processes are also cumbersome, requiring passengers to remove liquids and gels (LAGs) and specific electronic devices from their carry-on luggage.



CURRENT TASMAN JOURNEY

Upon reaching emigration, passengers can proceed through an SmartGate, present their passport and be reconciled with a photograph taken at the SmartGate. Passengers are yet again required to present their passport and boarding pass as they board the aircraft to cross the Tasman. Then, during their journey, they must complete an arrival card which includes customs declarations.

In Australia, passengers who wish to recover either GST or Wine Equalisation Tax they have paid on goods purchased for export must also queue up for their refund to be processed manually by Border Force officers.

On arrival at their destination, pre-qualified passengers can present to a SmartGate for immigration (primary passport control) where they are again required to present their passport which is yet again reconciled through a photograph taken at the SmartGate.

Passengers then collect their bags from reclaim and present to secondary triage where a Customs official collects the Passenger Arrival Card and makes a judgement as to whether the passenger can exit through the green 'nothing to declare' channel or is required to go through the red channel for further clearance by Customs and/or Biosecurity.



OPPORTUNITIES

- Opportunities for departure cards in New Zealand and arrival cards in Australia and New Zealand, reducing hassles for passengers
- Enhanced Advance Passenger Information (API) from airlines to border agencies, providing earlier and better quality passenger declaration information for customs and biosecurity agencies to assess and preclear most passengers and baggage
- Integration of emigration and immigration processes with airline check-in and API processes, reducing touchpoints in the passenger journey
- Validation of emigration at combined border and security, providing identification and profiling of passengers prior to screening
- Full digitalisation of Australia's Tourist Refund Scheme (TRS) to avoid further queueing, and privatisation of TRS processing, enabling digitisation of the tax refund process and redeployment of Australian Border Force officers to more pressing border protection duties
- Utilisation of departure security screening bag x-ray images to facilitate arrival clearance
- "Face on the fly" biometric identification of passengers while walking, reducing touchpoints in the passenger journey, building on trials by Brisbane Airport, Air New Zealand and SITA
- Expediting security screening through deployment of enhanced screening technologies to avoid restrictions on liquids and gels and need to remove electronic devices
- Expansion of the Streamlined Travel border processing being trialled in New Zealand at time of writing, including pilots for other models of 'trusted traveller' programs



KEY ISSUE

PASSENGER DECLARATIONS

A critical enabler of streamlined facilitation is the timeliness and quality of information that border agencies obtain about passengers and the contents of their baggage, in order to be able to make informed decisions including the level of inspection to perform. Currently, a major source of such information is obtained in the customs, border cash, biosecurity and health declarations that travellers provide in their departure and arrival cards.

Passports and biometric confirmation have become the universal and most effective means of passenger identification and obtaining transaction data. Arguably, passenger cards are a poor means for passenger identification, being manually completed and inconsistently retrieved and examined. The cards add little to achieving effective outcomes for these requirements and are also inconsistent with government goals to switch transactions from paper to digital channels.

The Australian Government has removed the need for the Australian Departure Card from July 2017 and the Australian Bureau of Statistics has revised the scope of statistical data that will be available from that time. The New Zealand Government is also reviewing the feasibility of ceasing departure cards.

OPPORTUNITY: PASSENGER DECLARATIONS VIA ADVANCE PASSENGER INFORMATION

It is fundamental that the countries retain strong capabilities to protect their respective borders while managing the movement of people and goods across the borders. This includes having the opportunities and facilities to intervene and inspect travellers and their luggage as they pass through airports. This requirement is not in question in this report; rather it is seen as desirable that future streamlined processes should strengthen border protection including, where necessary, intervention. In this respect, there is an opportunity to enhance the information that border agencies receive via customs, biosecurity and health declarations on arrival cards by changing the process to be digital rather than hand written. Options include mobile apps completed before departure or on arrival, apps integrated into inflight entertainment systems (transmitted via inflight WiFi), kiosks on arrival or incorporating information into airline check-in and Advance Passenger Information processes (API).

We see considerable merit in the airline API option as it would facilitate pre-clearance decisions being made for most passengers at the time of, or soon after completion of check-in, enabling full pre-clearance to be implemented prior to departure. Airlines already provide API to border agencies for departure and arrival including information relating to identification and recording of a person's entry and departure.

Airline check-in is increasingly conducted by passengers using mobile devices or kiosks, with airline check-in apps already including questions requiring Yes/No answers (e.g. safety and security declarations).

Enhanced API incorporating customs, biosecurity and health declarations would provide border agencies with earlier advice, giving more time for assessment, leading to better quality decisions on clearance or intervention, than is presently possible with the passenger card process. Any 'Yes' response would trigger a 'red flag' to agencies and an instruction for passengers to select the Red channel on departure or arrival (including a flag on a paper or digital boarding pass).

CUSTOMS DECLARATION

- Prohibited goods
- Goods of value in excess of allowances and concessions
- Goods for commercial, business or trade purposes

BIOSECURITY DECLARATION

- Phytosanitary and animal sanitary risk items
- Food products
- Plant or soil products
- Animal products

HEALTH DECLARATION

Have you or a family member been in [list risk countries] in the last 6 days?

BORDER CASH REPORT

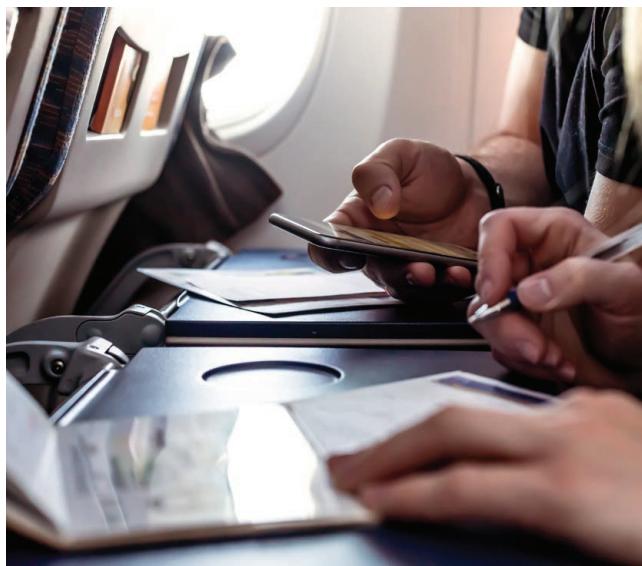
Passengers are required to report whether they are carrying more than \$10,000 in cash when they enter or leave either Australia or New Zealand.

STATISTICS

Information provided on departure cards is used for immigration statistics, including:

- Duration and purpose of travel
- Primary destination

These are linked to traveller's occupation and residence.



KEY ISSUE

MULTIPLE TOUCHPOINTS AND DUPLICATED PROCESSES

The current trans-Tasman journey involves multiple identity checks and touchpoints for passengers from the time they book their flights through to boarding the aircraft.

Passengers are required to present their passports and other documentation (such as visas and residency permits) at check-in, emigration, boarding, immigration and secondary triage.

Processing of departing passengers commonly involves queueing, even for SmartGates. Despite increased use of SmartGates, the emigration function still requires security staff resource time and occupies significant and costly space at airports.

SmartGate processing is often unable to be completed, even for qualifying passengers, requiring a further personalised transaction.

Emigration occurs just after security screening, commonly requiring queueing for a second time in close succession.

Immigration transactions, once these passengers arrive, effectively duplicate the earlier emigration transactions. Both transactions involve advance screening by agencies utilising Advance Passenger Information provided by airlines, then identity confirmation and passenger movement recording.

AUTOMATED BOARDING CONTROL

There are further opportunities to simplify touchpoints through increased use of automated aircraft boarding control with biometric passenger identification and matching of correct flight details, using a SmartGate triggered by a digital token, such as a boarding pass on a mobile device, or a passport).

The use of automated border controls provides the highest possible reliability in identifying passengers as they board. This high level of reliability allows for the mixing of domestic and international passengers in an integrated or common departure lounge.

OPPORTUNITIES: DIGITAL TOKENS; INTEGRATED EMIGRATION AND IMMIGRATION CLEARANCES

There are significant opportunities to streamline emigration and immigration processes and to reduce the multiple touchpoints and queuing situations for passengers through:

- Earlier provision of API to border agencies.
- Use of a single digital token to biometrically identify passengers as they enter security processing, in order to provide real-time access to their profiles, and enabling passenger screening to be targeted based on potential risk and need, and to complete the emigration transaction.
- Completion of the immigration transaction concurrently with the earlier emigration transaction, utilising early API provided at check-in, enabling the destination agency to have 'Approval to Enter' advice ready for when passengers present for emigration at the origin destination.



FACE ON THE FLY IDENTIFICATION

We recommend further investigation of Face on the Fly facial recognition technologies, aimed at achieving passenger identification without them needing to be stopped. This is particularly applicable as passengers enter into departure security screening as part of crossing the border and to assist the automation of the aircraft boarding process.

Case study 1

In March, 2017, Brisbane Airport, Air New Zealand and the aviation technology provider SITA joined forces to conduct the first trial of facial recognition technology in an Australian international airport. Known as the SITA SmartPath, the technology uses biometric data which enables passengers to provide their travel details at a self-serve kiosk when they check in, then proceed to an automated boarding gate, which uses facial recognition to provide access to the aircraft. As the system is refined, the opportunity exists to integrate with other systems in order to also provide immigration and border checks.

Case study 2

Border sector agencies in New Zealand are exploring initiatives to streamline border processing for low-risk travellers. One of these focuses on trialling an expedited process for frequent trans-Tasman business travellers who are New Zealand citizens with nothing to declare. Information and insights gathered from the trials will help inform the value and design of any proposals for the future. Maintaining border and biosecurity standards is key to any future proposals.

KEY ISSUE

AVIATION SECURITY SCREENING

Governments, airlines and airports share the responsibility of ensuring the safety and security of civil aviation, protecting them from the risks and threats posed by prohibited items, dangerous goods or persons with intent to cause unlawful interference. This includes monitoring and screening passengers, baggage and cargo.

We believe unequivocally that aviation security must not be compromised for the sake of facilitation through the passenger journey at airports.

Instead we consider that it should be feasible to enhance processes and outcomes for aviation security screening in conjunction with improvements to passenger journeys.

OPPORTUNITIES

- The provision of Advance Passenger Information (API) to aviation security service providers at the time of, or soon after check-in, in conjunction with the use of agreed digital tokens to identify and authorise passengers to enter and pass through border and security processing, will provide real-time access to passenger profiles, enabling streaming and screening by targeted risk and need.
- Collaboration between regulatory authorities to recognise equivalence in security screening between countries can enable streamlined transfer connections for passengers, avoiding rescreening at transfer points (one stop security).
- Alignment of international and domestic screening procedures, facilitated with enhanced screening technologies can pave the way for integrated departure terminals where domestic and international passengers can share the same dwell and departure areas, a key beneficial outcome from achieving pre-clearance.

*Aviation **Security must not be compromised** for the sake of facilitation through the passenger journey.*

*Shared **API and access control** at the outbound border will enhance security screening processes and outcomes by enabling advance identification of passengers.*

***One Stop Security** for enhanced transfer connections.*

***Integrated Terminals** for shared international and domestic processes and dwell spaces.*



KEY ISSUE

DUTY FREE

The ability to purchase duty free goods when undertaking international travel is an important benefit for travellers, retailers, airports and to some extent airlines. Initiatives for streamlining trans-Tasman travel must consider the retention of duty free retailing, and demonstrate procedures that enable this to continue to operate and comply with regulations.

OPPORTUNITIES

There are opportunities to retain and enhance duty free sales to travellers in pre-clearance environments through:

- Online orders, both pre-flight and in-flight (with airline partners) for arrival duty free with controlled pick-up on arrival in either international, or integrated domestic and international terminals.
- Sales for departure duty free in airports with dual pricing in integrated international and domestic environments.

*Duty Free shopping forms a **fundamental** component of the **airport retail offer** for departing and arriving passengers.*

***Online** orders pre-flight and in-flight.*

***Dual pricing** in integrated domestic and international environments.*



KEY ISSUE

TERMINALS

For optimal benefits of full pre-clearance to be experienced by travellers, their arrival at the destination airport should be the same as for a domestic traveller – unimpeded, with no apparent border check and baggage reclaimed in a domestic-like environment.

This would open the way for trans-Tasman flights with a majority of pre-cleared passengers to operate in either international or integrated domestic and international terminals at the destination airport. Integrated terminals would be a significant benefit for airlines operating purely trans-Tasman services, enabling more efficient utilisation of aircraft, reduced duplication of ground handling activities between terminals, and potential improvements in aircrew productivity.

For flight arrivals into pure international terminals, there would need to be an acceptance of co-mingling of pre-cleared and non-pre-cleared arriving passengers, or a means of segregating arriving pre-cleared passengers from non-cleared arrivals coming off other flights, in a pathway from gate to baggage reclaim.

For flight arrivals into an integrated domestic and international terminal, there would need to be procedures and facilities for the identification and separation of:

- Any non-cleared passengers and baggage for secondary screening; and
- Passengers connecting to onwards international flights.

In a scenario where all arriving passengers were pre-cleared before departure, arrivals into a domestic-like environment would be very simple with only international connecting passengers to manage.

Furthermore, if a trans-Tasman flight were to be arriving into an integrated domestic and international facility, it is highly desirable for airlines that the aircraft's next departure should be from that same gate even if the flight is a return trans-Tasman journey.

This would require procedures and facilities to enable international (trans-Tasman) passengers to depart via that gate, similar to integrated domestic-international terminals that operate this way in the UK. The advent of biometric identification has laid the basis for domestic and international passengers to share terminal dwell spaces and processing facilities, while enabling accurate confirmation that passengers are boarding the correct flights.

CONNECTING PASSENGERS

Initiatives that would enable most trans-Tasman passengers to arrive at their destination airports essentially with the status of a domestic traveller would facilitate simplified connections to onward domestic flights, including avoiding the need for the transferring passenger to reclaim and recheck baggage.

For flight arrivals into integrated international-domestic terminals, there would need to be procedures and facilities for the identification and separation of passengers connecting to onwards international flights, who would only be transiting and would not need to be pre-cleared.

We consider that this would be straightforward through the provision of a connecting international transfer corridor linking the arrival gates.



TERMINAL CONFIGURATION

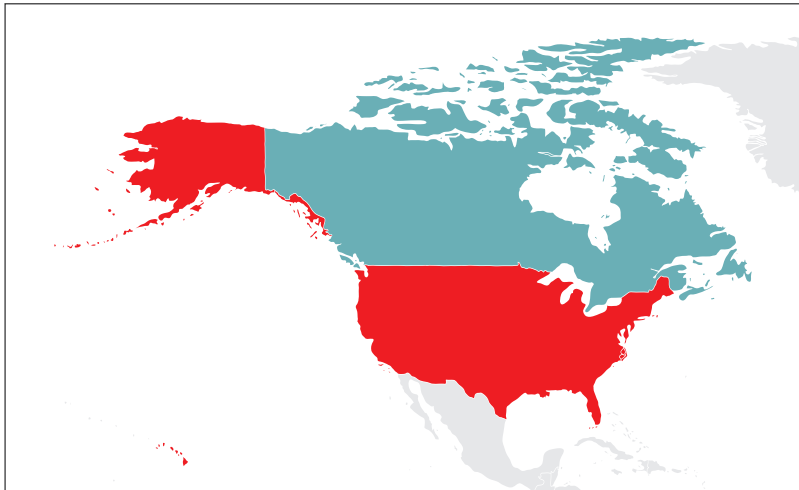
Major gateway airports in Australia and New Zealand are already anticipating opportunities for closer integration of international and domestic operations, including potential pre-cleared arrivals, and are at various stages of planning for the development of integrated "single roof" terminals.

However, historical legacy configurations of terminals at some airports could pose significant challenges for accommodating pre-cleared operations in the near to medium term, particularly where international and domestic terminals are separated.

Accordingly, the opportunities, potential benefits and costs and timeframe for any infrastructure changes may vary substantially between airports in both countries.

TRENDS AND CASE STUDIES

U.S. CUSTOMS AND BORDER PROTECTION (USCBP) PRE-CLEARANCE AGREEMENTS



These pre-clearance arrangements operate from a number of airports in Canada (known as Transborder operations), Ireland, Aruba, Bahamas, Bermuda and United Arab Emirates. Pre-cleared flights operate from international terminals in origin countries into domestic terminals at US destination airports, without the need for further processing on arrival in the USA.

Pre-clearance of passengers and baggage is carried out in full by USCBP personnel who are physically stationed in the departure airports. This process occurs in the same terminal after departing passengers have completed outbound border processing from the origin country.

Procedures for remote processing and clearing checked baggage, including accurate identification and retrieval provide strong precedents for the feasibility of trans-Tasman pre-clearance.

BENEFITS

- **Passengers** – avoid long arrival queues in the USA.
- **Border** – Enhanced aviation security - risks are assessed prior to departure and before landing in the USA.
- **Airline** – Airlines can fly to USA domestic airports, potentially expanding their route network.
- **Airport** – Relieves pressure in immigration and baggage reclaim zones of USA airports.

RISKS

Because the origin airport is required to pay for the cost of terminal space and facilities, as well as for stationing USCBP personnel, there are risks that the business case for entering into and retaining USCBP pre-clearance may not be sustainable in the long term. However, by transferring screening to departure points, space and cost burdens are shifted to departure airports.



U.S. Customs and Border Protection (USCBP) pre-clearance agreements represent one method of pre-clearance at airports. However, this method does not eliminate any duplication of the passenger journey; it only shifts the responsibility of arrivals immigration to the departure port. Although USCBP allows the departure port access to new markets within the USA that were previously not available, it comes at a significant cost by transferring screening, space, resourcing and infrastructure burdens onto departure airports.

LESSONS FOR TRANS-TASMAN PRE-CLEARANCE

- Process implemented must have reciprocal benefits for both Australia and New Zealand
- Responsibilities for implementation, operation and funding must be shared amongst all stakeholders rather than being left to one party
- USCBP pre-clearance is a positive benchmark for remote clearance of checked baggage, and for methods of baggage retrieval for re-uniting with passengers for closer clearance inspections

TRENDS AND CASE STUDIES

COMMON TRAVEL AREA



The Common Travel Area (CTA) is a special travel zone between the United Kingdom (UK), the Republic of Ireland, the Isle of Man and the Channel Islands. Nationals of CTA jurisdictions can travel freely within the area without being subject to passport controls. Photo ID is required for Irish or British citizens travelling by air at the minimum. There are minimal immigration checks for journeys started within the CTA, however non-CTA nationals must have relevant immigration permission for the country they are seeking to enter as both countries still maintain their own visa and immigration policies.

Unlike the Schengen Agreement, the CTA currently provides no mechanism for the mutual recognition of leave to enter and remain, and the UK and Ireland operate separate visa systems with distinct entry requirements.

BENEFITS

- Easier movement between countries for passengers.
- Less monitoring of borders for states (less resource; more cost effective).
- The UK and Ireland maintain their own visa and immigration policies and maintain different approaches to conducting controls within the CTA.
- Faster passenger processing at airports results in a more streamlined journey and potentially fewer facility provisions.
- Simplified terminal facilities at many airports (with possible exception at Port-of-Entry airports).

RISKS

There is uncertainty about the impact on CTA of the withdrawal of the UK from the European Union (Brexit). Since the referendum result, the Irish and UK Governments have confirmed a shared intention to maintain the benefits of the CTA.

There is a risk of CTA border arrangements being abused by people seeking to evade the usual controls on entry to Ireland or the UK.

The need for some airports to operate as Port-of-Entry airports into and out of the CTA adds complexity to facilitation and terminal facilities.



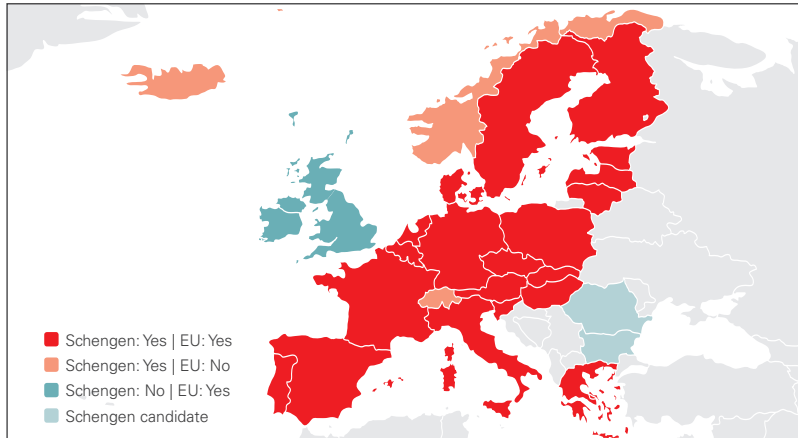
Easier movement between countries for passengers.

Improved airline efficiency through fewer visa checks for airlines.



TRENDS AND CASE STUDIES

EU SCHENGEN AGREEMENT



The Schengen area guarantees unrestricted travel within the European Union (EU) by removing internal borders within a territory of 26 countries, home to more than 400 million citizens. Europeans make 1.25 billion journeys within the Schengen area every year. Both EU citizens and non-EU nationals may freely travel within the Schengen area and are checked only when crossing the external border. Schengen nations do not carry out checks at their internal borders.

External borders have harmonised controls. EU nationals undergo minimum checks to verify their identities. Non-EU nationals must present valid travel documentation including visa or residence permits if required.

BENEFITS

- **Passengers** are free to travel wherever they wish within the Schengen Area without having to worry about passports, visas or queues at control points. The common visa policy across Europe streamlines travel.
- **Border** – Reduced cost of border control as internal borders within the Schengen Area no longer have to be patrolled. All members share in the cost of maintaining external border controls, so small countries on the edge of the Schengen Area don't shoulder a disproportionate cost. There is enhanced police cooperation and information exchange in the Schengen area through the SIS.
- **Airlines** – Fewer visa checks for Schengen to Schengen travel, and fewer risks of costly fines if they don't perform these checks. There is also greater flexibility in the use of aircraft within the zone.
- **Airports** – Faster processing of passengers resulting in more streamlined journeys and potentially fewer facility provisions.

RISKS

- Requires huge amount of co-operation, trust and standardisation of processes and policies between member states. Once a visa expires, the traveller must leave the entire Schengen Area.
- Potentially higher risks of cross-border terrorism and health issues.
- Unknown implications if countries leave the Schengen Zone (e.g. Brexit).

The following pages describe and compare three options for how trans-Tasman journeys could be streamlined to achieve much of the Vision that we have set out at the start of this report.

EURO TUNNEL

Belgium, France and the United Kingdom have agreements where immigration entry checks into the Schengen Area on certain cross-Channel routes take place before boarding the train or ferry, rather than upon arrival after disembarkation. These are known as juxtaposed controls. With the exception of the Eurotunnel route, customs checks remain unaffected by immigration controls and continue to take place upon arrival after disembarkation. The reason for juxtaposed controls is a wish to prevent illegal immigration before reaching Belgium, French, or British soil.

Benefits

- **Passengers** – Does not remove the check but shifts it so that passengers only need to queue before departure. This simplifies the process for passengers and does not add time to the journey.
- **Border** – Passengers without adequate documentation or wishing to claim asylum on arrival can be stopped prior boarding the train.

Faster processing of passengers at airports.

Cost effective and more secure border controls with fewer checks required.



FAST FORWARD

SCENARIO 1: COMMON BORDER

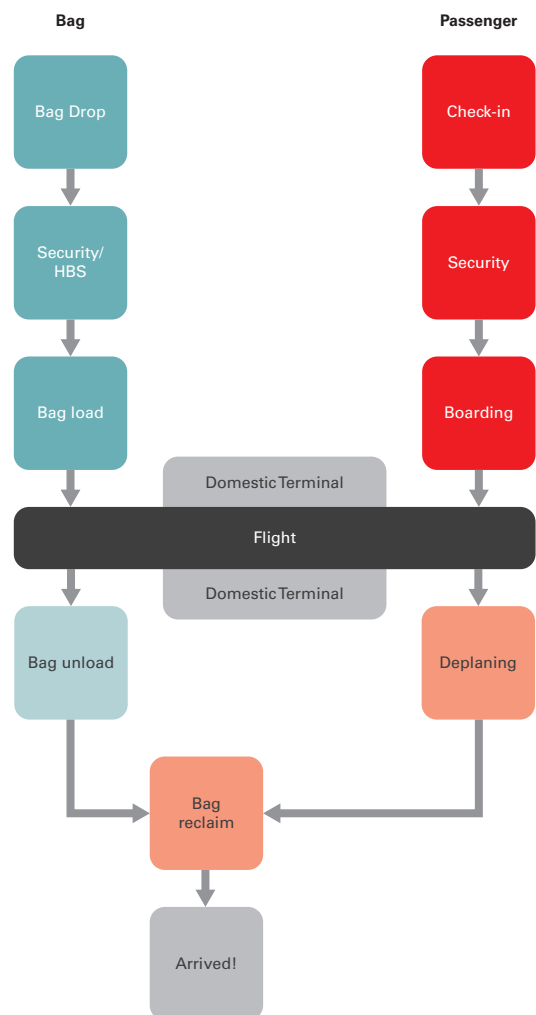
An option for the simplification of the Trans-Tasman journey is a scenario known as **“common border”** under which a single border would be created around Australia and New Zealand. Features of this scenario would likely include:

- Common visa, entry permit and customs arrangements and procedures for the two countries – passport, visa and customs control only at the points of entry to and exit from the common border region.
- **Trans-Tasman flights being effectively domestic without border controls** in respect of immigration and customs – essentially the same as air services across state borders in Australia.
- Greater mobility of people leading to greater employment, social and economic integration between the two countries.
- Potential reduction or loss of sovereignty over many aspects of policy, regulation and enforcement for each country and implications for bilateral relations with other countries – air service agreements, free trade agreements, etc.

A common border would produce the simplest, most streamlined outcomes for trans-Tasman passenger journeys. But it also would be complex to plan, agree and achieve. It would require exceptional bipartisan political desire and will in both countries, with implications much broader than satisfying the objective of streamlining trans-Tasman journeys, and for these reasons is considered to be highly unlikely.

In 1992, despite being promoted at the highest political level, the proposed reform to create a common border regime foundered on issues of sovereignty, common visas and the complexity of biosecurity requirements.

If there should, in future, be a broadly based desire for reforms to deliver increased political, economic and social union between the two countries, a Common Border providing for domestic trans-Tasman flights would be a highly desirable outcome.



SCENARIO 2: FULL PRE-CLEARANCE (BY FLIGHT)

Features of this scenario would likely include:

- Under this scenario, it is highly desirable that the aircraft's next departure should be from that the same gate at which it arrives, whether it operates a domestic sector or a trans-Tasman journey. This would require procedures and facilities to enable international (trans-Tasman) passengers to depart via that gate, effectively necessitating an integrated or common domestic-international terminal, similar to many that operate in this way in the UK.

```

graph TD
    subgraph Bag
        BD[Bag Drop] --> S[Security/CBS/HBS]
        S --> CR[Cleared bags released]
        S --> UBH[Uncleared bags held]
        CR --> BL[Bag load]
        BL --> F[Flight]
        F --> BU[Bag unload]
        UBH --> BR[Bags recalled if required]
        BR --> CB[Customs biosecurity]
        CB --> BRCL[Bag reclaim]
    end

    subgraph Passenger
        CI[Check-in] --> DAD[Departure & Arrival Declarations via check-in API]
        DAD --> EIS[Emigration/Immigration with integrated security]
        EIS --> NCP[Non pre-cleared passengers]
        EIS --> PCP[Pre-cleared passengers]
        NCP --> ST[Secondary triage]
        ST --> CB
        PCP --> B[Boarding]
        B --> F
        F --> DP[Deplaning]
        DP --> BRCL
    end

    BU --> BRCL
    BRCL --> A[Arrived!]

```

FAST FORWARD

SCENARIO 3: PRE-CLEARANCE (BY PASSENGER)

A third scenario, “**pre-clearance by Passenger**”, would preserve the current border between Australia and New Zealand but enable the **majority of travellers** to be **pre-cleared at their departure port**. Features of this scenario would likely include:

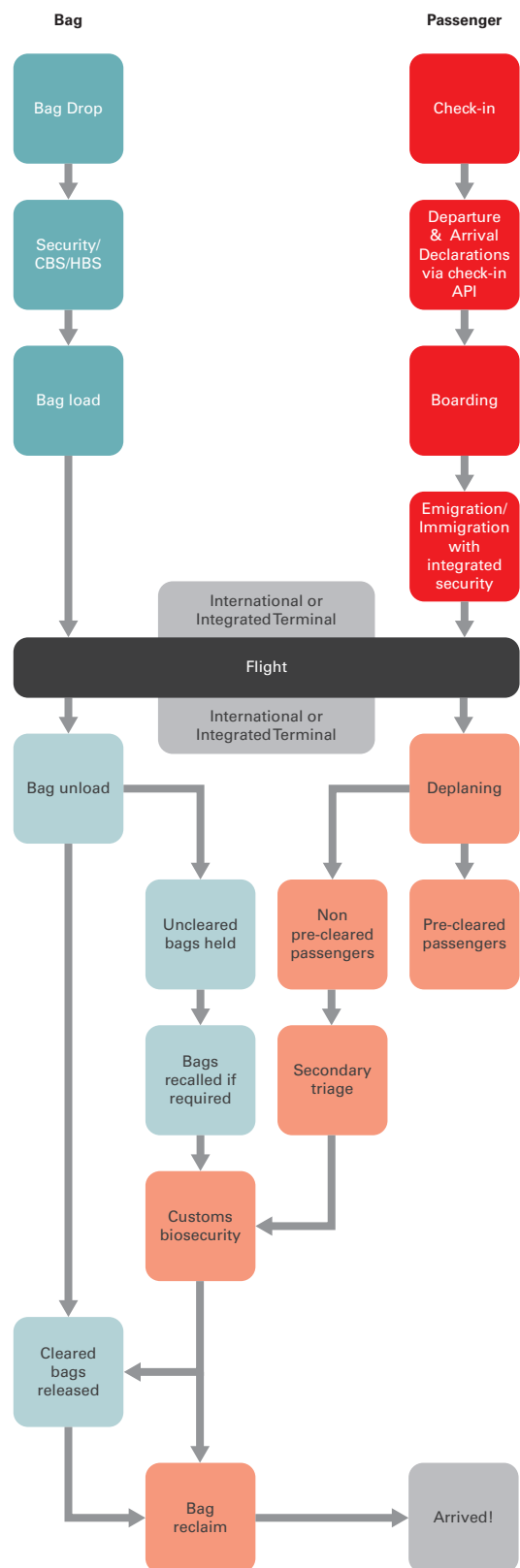
- Each country’s visa, entry permit and customs arrangements would remain.
- Enhanced Advance Passenger Information (API) provision to border and security screening agencies in both countries, prior to departure, will provide for better security screening processes and outcomes, and would facilitate clearance decisions to be made for the majority of (but not necessarily all) travellers, prior to or during the trans-Tasman flight.
- Pre-cleared passengers arriving at destination airports in Australia and New Zealand with the status of domestic travellers, with no additional formalities.
- An acceptance that pre-cleared and non-cleared passengers could co-mingle inflight.

For flight arrivals into international terminals, there may need to be a means of segregating arriving pre-cleared passengers from non-cleared arrivals coming off another flight, in a pathway between the arrival gate and baggage reclaim.

For flight arrivals into integrated domestic-international terminal, there would need to be procedures and facilities for the identification and separation of:

- Non-cleared passengers and baggage for secondary screening; and
- Passengers connecting to onward international flights.

The pre-clearance (by Passenger) scenario should be readily achievable, without requiring the complex political and non-aviation policy changes for common border, while still delivering a significantly streamlined journey and travel experience for the majority of passengers, and improved outcomes for customs and biosecurity from improved advance screening of passengers and their luggage.



FAST FORWARD

COMPARING THE SCENARIOS

The purpose of this report is to explore opportunities and potential options for streamlining the trans-Tasman passenger journey and experience. The range of issues is extensive and the challenges are varied and complex, and can only be resolved through a collaborative approach between industry participants and regulators on both sides of the Tasman, as well as relevant outside parties. Here, we have provided a side-by-side comparison of how the three options described previously respond to the main considerations.

Considerations	Scenario 1: common border	Scenario 2: full pre-clearance (by Flight)	Scenario 3: pre-clearance (by Passenger)
Border agencies (border integrity and protection)	Involves removal of the border and unrestricted movement of persons in a domestic environment.	Should be significantly enhanced due to earlier (e.g. at time of check-in) and better quality API. Risky persons considered unlikely to be admitted into arrival port would not travel. Requires significant collaboration and potential intra-national agency relationships for all border agencies and airlines to achieve full pre-clearance prior to departure.	Should be significantly enhanced due to earlier (e.g. at time of check-in) and better quality API. Requires collaboration particularly between immigration and customs agencies, and airlines.
Passengers (fewer touchpoints, simplified journey experience)	Significantly streamlines trans-Tasman journey to be 'more domestic-like'.	Significantly enhanced and streamlined journeys for all passengers enabling arrivals with 'domestic-like' experience without agency interventions.	Significantly enhanced and streamlined for most passengers.
Airlines (business growth and improved efficiency)	'Domestication' likely to significantly stimulate travel and improve efficiency, particularly by enabling more flexible use of fleet and potentially aircrews where flights are purely point-to-point trans-Tasman.	Streamlining should reduce minimum connection times, increasing the competitiveness of airlines and stimulating travel. Opportunities for greater fleet versatility and efficiency of operations by Australian and New Zealand airlines. Requires willingness to incorporate passenger declarations into check-in and API processes.	Streamlining should reduce minimum connection times, increasing the competitiveness of airlines and stimulating travel. Opportunities for greater fleet versatility and efficiency of operations by Australian and New Zealand airlines. Requires willingness to incorporate passenger declarations into check-in and API processes.
Airports (business growth and improved efficiency)	Significant shift in operational demand to domestic or multi-purpose terminals.	Streamlining should reduce minimum connection times, increasing the competitiveness of airports as hubs and stimulating travel. Investment required to modify terminal facilities includes: - On departure for security/border processing and baggage handling - On arrival for international terminals These initiatives open opportunities for integrated domestic/international terminals.	Streamlining should reduce minimum connection times, increasing the competitiveness of airports as hubs and stimulating travel. Investment required to modify terminal facilities includes on arrival for international or integrated international/domestic terminals. This opens opportunities for integrated departure terminals.
Fundamental success factor	Political and social desire for integration or union of nations.	Shared vision and collaboration among industry stakeholders.	Shared vision and collaboration among industry stakeholders.
Duty Free sales within airports	Likely to have significant effect.	Should have minimal impact. Opportunities for online sales (including inflight) with arrival collections.	Should have minimal impact. Opportunities for online sales (including inflight) with arrival collections.

WHAT STAKEHOLDERS SAY

In the course of preparing this report, Airbiz consulted with a broad range of industry stakeholders, with their expert contributions providing valuable insights to how a streamlined trans-Tasman journey would be beneficial to themselves and the industry, as well as other factors that must be considered in implementing these initiatives.

Various stakeholders have already collaborated to achieve a relatively seamless trans-Tasman experience. However, there is a consensus that the trans-Tasman journey can and should be further improved.

Without exception, stakeholders did not consider that a common border scenario was warranted or achievable, but did indicate that streamlining the journey through other pre-clearance options and initiatives would be positive steps towards a domestic-like travel experience.

Stakeholders shared common views that to establish a successful streamlined trans-Tasman journey and recognise the full benefits this initiative has to offer, there must be “give and take” between all stakeholders. Even deeper collaboration must occur for all stakeholders to see the full benefits of a streamlined journey; all stakeholders must share the challenges and responsibilities to change.

A major contributing factor to the success of stakeholder collaboration and improved clearance decision-making was identified as being the utilisation of digital technologies for earlier (e.g. at time of check-in) and more comprehensive Advance Passenger Information (API) and data sharing (with alignment of methods and standards).

A further area that was identified as requiring very close collaboration was in respect of customs and biosecurity screening and clearance methods and standards, as these lie at the heart of achieving pre-clearance for most or all passengers and their luggage prior to departure.

Stakeholders noted that legacy configurations of terminals at some airports could pose significant challenges for accommodating pre-cleared operations in the near to medium term, particularly where international and domestic terminals are separated. Accordingly, the opportunities and potential benefits and costs will vary substantially between airports in both countries, affecting uniformity of solutions and timing of implementation.

BENEFITS

The principal reason stakeholders believe this initiative to be important is for the improvement of passenger experience.

However, this objective was closely tied to maintaining and improving the integrity of national borders and aviation security, with stakeholders unequivocal that any enhancements to passenger journeys could only be made if they did not compromise the safety of our nations’ borders.

Stakeholders noted that benefits would not only apply to trans-Tasman point-to-point passengers, but would provide significant benefits to connecting passengers as well.

***Improved** passenger experience.*

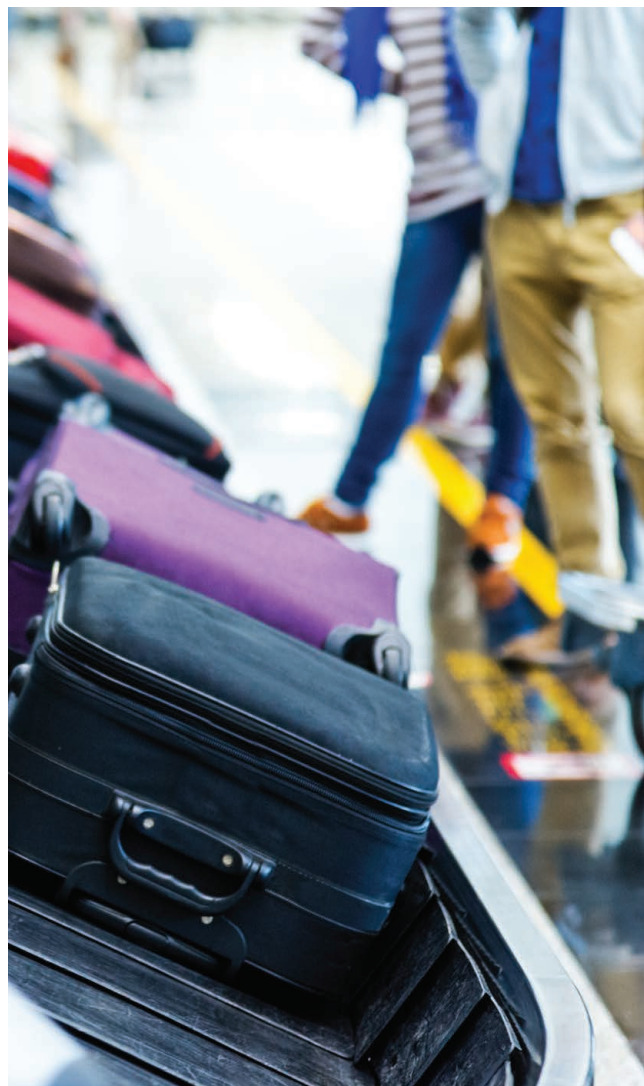
***Improved** border security.*

***Advance** Passenger Information.*

***Collaboration** and data sharing.*

***Reduced** costs.*

***Flexibility** for constrained airports.*



RECOMMENDATIONS

In this report we have described opportunities and high level options for streamlining the trans-Tasman passenger journey and experience, in particular considering the primary requirements and benefits to achieve passenger pre-clearance at a departure airport and to simplify touchpoints at an arrival airport.

The range of issues is extensive and the challenges are varied and complex, and can only be resolved through a feasibility study via a “whole of industry” collaborative approach. It is therefore premature to recommend a specific option in this report.

However, we are able to make a number of specific recommendations for initiatives that can be independently studied and implemented incrementally. These, individually and collectively, will contribute to progressively streamlining the trans-Tasman journey and eventually achieving highly effective and efficient pre-clearance for most or all passengers.

We recommend that:

Border agencies should:

- Require that Advance Passenger Information includes declarations, and be provided progressively and earlier to facilitate more time for assessment and improved clearance decisions.
- Provide passenger and baggage clearance decisions in respect of immigration, customs and biosecurity as early as possible in the departure process, ideally immediately on the completion of check-in for most passengers.
- Work with airlines to integrate the linkage of passenger identity, airline, trip and border agency information into a single digital biometric token.
- Recognise the use of agreed digital tokens to identify and authorise passengers to enter and pass through border and security processing in order to provide real-time access to passenger profiles, enabling streaming and screening by targeted risk and need.
- Deploy enhanced screening technologies to avoid restrictions on liquids, aerosols and gels (LAGs) and the need to remove electronic devices, streamlining security screening, and leading to standardisation of screening procedures for international and domestic facilities which underpins integrated terminals.
- Improve design and operation of screening stations to provide more efficient processing, particularly in the preparation and additional screening steps.
- Collaborate with other regulatory agencies to institute One Stop Security (and Recognition of Equivalence) screening for enhanced transfer connections.
- Undertake further investigation of Face on the Fly technologies, aimed at passenger identification without needing to be stopped.



RECOMMENDATIONS

Airlines should:

- Prioritise development and enablement of mobile check-in off-airport with mobile boarding passes to be recognised in airport border processes in order to reduce or minimise wasteful space, resources and time for traditional airport check-in.
- Extend check-in and Advance Passenger Information (API) content to include customs, biosecurity and health declarations integrated into check-in, to remove the need for manual passenger cards and to provide border agencies with earlier passenger declarations.
- Provide API progressively and earlier to border agencies to facilitate more time for assessment of declarations and improved clearance decisions, ideally at or soon after the completion of check-in, so that pre-clearance decisions can be made prior to departing passengers entering security screening.
- Expedite the development of digital bag tags enabling off-airport registration of baggage so that passengers can arrive at airports “ready to travel”.
- Increasingly use automated boarding control with biometric passenger identification and matching of correct flight details, using a SmartGate triggered by the digital token (boarding pass on mobile device, or passport) to streamline passenger processing, achieve highest possible reliability in identification of correct boarding, and to facilitate mixing of domestic and international passengers in integrated/ common departure lounges.

Airports should:

- Investigate the terminal facilitation requirements to implement the Full pre-clearance (Flight) and pre-clearance (Passenger) options, particularly facilities and procedures for retrieval of bags (either on departure or arrival) for closer clearance inspections where required.
- Initiate a strategic working group with border agencies and airlines to co-ordinate and progress the various work streams.
- Establish a pilot program with two airports (one each in Australia and New Zealand) and an airline to trial a pre-clearance option.

Airports, airlines and border agencies (“whole of industry”) should:

- Collaborate to determine the optimum means of implementing trans-Tasman pre-clearance with consideration of broader options and issues such as how, when and where to clear passengers and baggage for which declarations and profiling trigger a requirement for additional screening, inspection or intervention.

NEXT STEPS

Substantial enhancement and streamlining of trans-Tasman journeys and facilitation is highly beneficial and possible, aimed at providing full pre-clearance to all or a majority of travellers.

A “whole of industry” working group should be convened to investigate the feasibility of the vision expressed in this report, as well as other possible options.

The working group needs to have clearly articulated political support and mandate from the highest levels of both countries and its leadership should be a “champion” of change for better security, resource efficiency and customer experience outcomes.



ABOUT THE AUTHORS



Greg Fordham is Managing Director of Airbiz and an internationally sought advisor, visionary and thought leader in air transport issues and opportunities, airport planning and development concepts, trends and futures. He was a Board Member of the ACI Asia-Pacific Region for 8 years and is the former Chairman of the ACI World Business Partners Advisory Board. Greg was included in Australia's Top 100 Most Influential Engineers 2009.

In addition to 30 years international aviation and airport planning consulting experience, he has lectured at Loughborough University, Monash University and the University of New South Wales and is a member of the Advisory Board for the aviation courses at Swinburne University.

Greg is a global evangelist and facilitator of conceptual planning and implementation strategies for 'Airports of the Future' and 'Fast Travel' initiatives.



Iain Munro leads the Aviation Business consulting team at Airbiz, undertaking airport traffic forecasts, financial and business case analysis, airline pricing advice, air service development strategies and transaction advice. He has over 30 years' experience in aviation business, infrastructure planning and airline operations, specialising in master planning for airports and terminals, strategic and business planning for airline and airport operations, and the introduction of new technology Fast Travel

airline and airport processes and systems. Iain has been involved in many future-technology focused advisory assignments for Airbiz, including lead or major roles on projects for Air New Zealand, Jetstar, Singapore Changi, Melbourne, Adelaide, Brisbane and Gold Coast Airports.



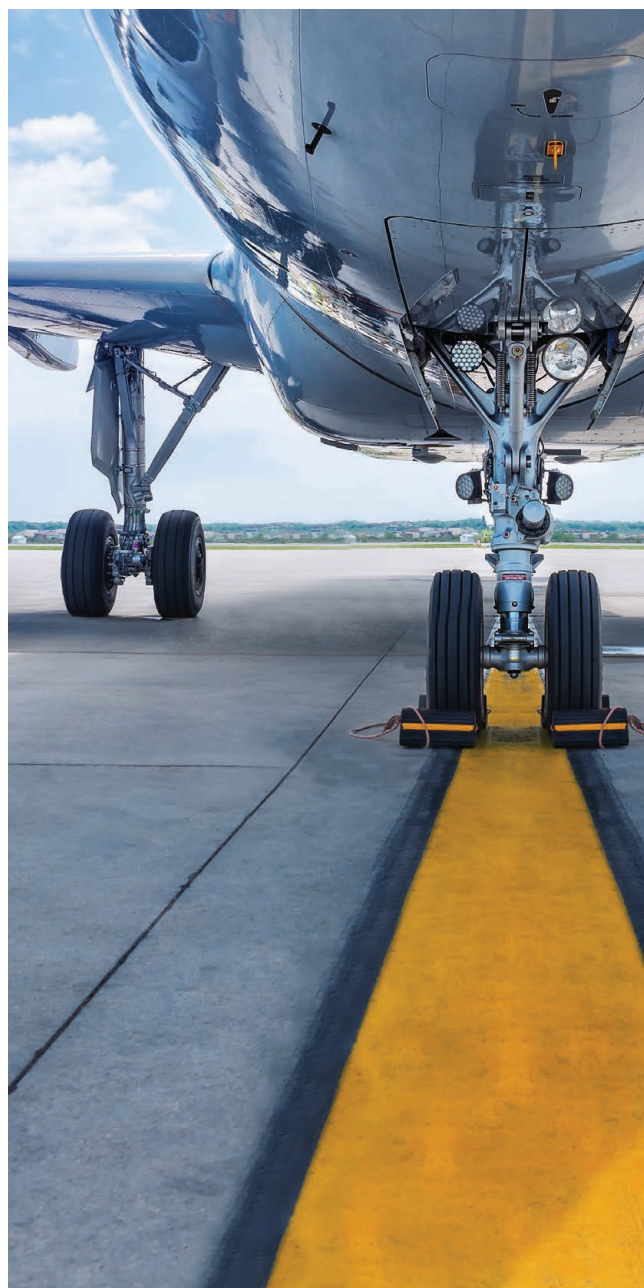
Alice Brightwell is an aviation consultant with Airbiz, involved in a range of activities internationally across disciplines including terminal planning, fast air transport forecasting, demand analysis and aviation business. As a project manager, Alice has led numerous projects including Transaction Advisory services, Fast Travel strategies and Airport Business Plans. She has been involved in multiple studies focused on the implementation of latest innovative technologies to enhance passenger

experience through optimising processes and improved design layouts, and was a key member in the development of the Cathay Pacific 2020 Vision completing field observation, research and the creation of a blueprint document for the vision implementation.

MESSAGE FROM THE AUTHORS

It has been a privilege for Airbiz to participate with TTF in the preparation of this report, having the opportunity to consult broadly with stakeholders, research global trends and express our informed views about how air travel of the future can be enhanced, to be more enjoyable for passengers and more effective and efficient for border agencies, airlines and airports.

Greg Fordham
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