A guide to aviation industry suppliers 2017
Energising Skies
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Headline sponsor

JR Technologies
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NDC ENABLED RETAILING & PAYMENT SOLUTIONS
PASSENGER CENTRIC DISTRIBUTION SYSTEMS

Offer & Order Management
Rich Content & Merchandising
Business Intelligence & Analytics
Corporate Booking Tools
Travel Agency Portals

COST EFFICIENCY
Core airline business simplification with master data source.

AGILITY
Real time BI and omni-channel airline strategies.

VELOCITY
Rapid growth and speed to market.

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A FORCE FOR GROWTH

Aвиация is the business of freedom and that business spans a tremendous range of innovative companies and organizations who are committed to enhancing air connectivity and giving passengers the freedom to explore, trade, study, and meet loved ones around the world.

The IATA Strategic Partnerships program is a platform for industry collaboration that brings together many of these businesses. This Strategic Partners Guide has been produced to profile those organizations that see the value in working with IATA and its members to help drive industry change. For 26 years, the Strategic Partnership community has worked alongside the IATA membership to address aviation’s most pressing issues—including safety, security, improving the passenger experience, and modernizing distribution.

IATA’s Strategic Partners have played key roles in vital industry programs such as Simplifying the Business initiatives, New Distribution Capability, Fast Travel and more. These transformational projects can only be achieved if the aviation value chain is aligned.

I extend my thanks to the 420 Strategic Partners for contributing so much to our industry. Together, our work is creating more value and making aviation an ever safer, more secure, efficient and sustainable industry.

If you are not yet an IATA Strategic Partner, I invite you to join us. The thought leadership provided by our partners is an essential part of our work for a stronger aviation industry.

DELIVERING EXCELLENCE

Our industry is poised for a fundamental change in distribution technology, driven by an unprecedented requirement for agility in airline product modeling. The issue is not that airlines must adapt to change, it is rather that airlines need to predict and deliver what each passenger needs at the right time and the right place.

Here at JR Technologies, the core principle underlying all of our product development, is that in order for an airline to maintain and increase its revenues, the airline must shift its focus towards a retailing strategy giving it access to new revenue streams, brand differentiation and increased passenger loyalty.

Speed to market is also critical, agility to change system components or integrate them with other components is a must, and full supplier control over what is offered, ordered, delivered, and paid, is built into our systems.

JR Technologies does not work alone. We have partnered with several major players in our industry to deliver everything from pricing, to NDC-enabled retailing, to payment solutions. Partnering with JR Technologies will give you access to the best problem-solvers in our industry and a coordinated approach to your NDC transformation.
HELP TO SHAPE AVIATION’S FUTURE
The IATA Strategic Partnerships program helps bring suppliers’ wide-ranging expertise to the world’s airlines

LETS GROW TOGETHER
Strategic Partners are the only non-airline businesses to have the opportunity to attend the IATA AGM and network with the CEOs and top managers of our member airlines. I urge you to investigate the potential of this unique program and forge new and effective partnerships for a safer, more profitable and more sustainable aviation industry.

ALEXANDRE DE JUNIAC, IATA Director General and CEO.

IATA, the International Air Transport Association, is the trade association for the world’s airlines. IATA represents 265 airlines — this equates to 83% of total air traffic. We support many areas of aviation activity and help formulate industry policy on critical issues. We do this with a unique global approach rooted in nearly seven decades of history.

A quarter-century ago, there was little formal dialogue between the airline industry and its service providers on the issue of setting vital industry standards.

IATA recognized this untapped potential, given that suppliers represented a vast reservoir of technical knowledge.

In 1990, IATA and nine founding members joined forces to create the Strategic Partnerships (SP) program. Focused on only a few strategic areas, its objectives were to pool resources and expertise, support IATA and its initiatives, and assist in the development, implementation and promotion of industry standards.

Today, SP has grown into a community of more than 400 partners worldwide, sharing ideas and collaborating to improve aviation practices and technology.

This forward-thinking program focuses on more than 40 areas of involvement, covering a comprehensive range of industry activities.

Members contribute to the efforts of more than 100 work groups and task forces. This collaborative force has greatly enhanced the quality of IATA standards over the years. Initiatives developed in conjunction with Strategic Partners have delivered countless operational efficiencies and safety enhancements for airlines.

Strategic Partners have also benefited, receiving intelligence on key opportunities by participating in workgroup and task force discussions. Creating a forum for cooperation has been a win-win solution for all stakeholders.

IATA and its Strategic Partners continue to work together to forge a stronger future for the air transport industry.

The IATA SP program is your opportunity to have a stake in shaping the air transportation industry’s future. The program allows you to
contribute to the development of innovative solutions to industry challenges, and get an insider’s view of aviation’s strategic plans and play a role in their implementation.

As an IATA Strategic Partner expect to drive policy and effect real change. Help to lower the industry’s impact on the environment, improve the passenger experience, increase airline and airport efficiency, reduce travel-chain costs... the opportunities are as big as the challenges we face!

As an IATA Strategic Partner you will:
● Help define the industry’s roadmap for innovation
● Contribute to standards improvement and development
● Have a voice at the decision-making table
● Be an active part of new solutions development and delivery
● Share your expertise with other aviation leaders and make your mark on the industry

The IATA SP program provides an invaluable platform for members to collaborate with other aviation leaders on mutual concerns and emerging issues.

We provide unique forums where you can share ideas and information, strengthen strategic business connections and shape industry standards affecting your products and services.

Hear about the needs of airlines directly from the executives who lead them and gain a deeper understanding of how to best serve the industry.

As a Strategic Partner, you can use this feedback to develop new services and help your customers by:
● Meeting airline CEOs and other senior executives on a regular basis
● Broadening your contacts with other international thought leaders and decision-makers
● Staying abreast of industry trends
● Positioning your company as a supplier of choice

Membership in the IATA Strategic Partnerships program provides much more than taking part in various work groups, gaining first-hand insight into airline priorities and benefiting from exclusive access to important developments.

The program also provides opportunities to raise your profile with potential new clients and position your company as a supplier of choice to the aviation industry. In addition, you will be recognized as a valuable supporter of IATA and the air transport industry, giving you an edge over your competition.

Tangible benefits include:
● Use of the IATA Strategic Partnerships logo on your website, business card, etc.
● A listing in the IATA Strategic Partnerships online directory
● The posting of your press releases on the IATA Strategic Partnerships website
● The ability to publish your articles in the quarterly IATA Partner Brief
● Raising your profile in the industry
● The growth of your business

Program areas of expertise
As a member of our SP program, you will become an influential key player in your field of expertise and help bring new solutions to the world of air transport.

Whether your company’s solutions are related to fuel, safety, the passenger experience or any other aviation specialty, the SP program gives you exclusive access to subject matter experts, 265 IATA member airlines, potential clients and essential information which can drive your business forward.
AVIATION: A GLOBAL MARKET

3.8 billion
air travelers in 2016
Source: IATA

62.7 million jobs
supported worldwide in aviation and related tourism, of these 9.9 million people work directly in the aviation industry
Source: IATA

7.2 billion passengers expected to travel in 2035
Source: IATA 20-Year Air Passenger Forecast

China will displace the US as the world’s largest aviation market in about 2024. India will displace the United Kingdom for third place in 2025.
Source: IATA 20-Year Air Passenger Forecast
World scheduled passenger and freight traffic by region of airline domicile


North America 13.6%
Europe 34.2%
Asia Pacific 31.4%
Middle East 14.4%
Africa 2.7%
Latin America 3.8%

Air transport carries around 35% of world trade by value. Only 0.5% by volume

Source: Aviation: Benefits beyond borders

IATA expects the global airline industry to make net profit of $29,800,000,000 in 2017

3,883 airports
26,065 aircraft in commercial service
1,402 commercial airlines

32.8 million commercial flights worldwide
GET THE MOST OUT OF YOUR STRATEGIC PARTNERSHIP

For a collaborative relationship to work, it must be a win-win for the airline and supplier.

Relationships between airlines and their suppliers come in all shapes and sizes. At one extreme are cost-led, procurement-based, short-term relationships. At the other extreme are long-term strategic partnerships, which are much more than simply supplying goods or services, but are based on a common understanding that each side can help the other achieve its goals.

Airlines have become more sophisticated in how they choose suppliers and manage their supply chain. Many now realise that contractual relationships based on price do not meet their needs and are inherently inefficient and wasteful, and there is a growing understanding of the role strategic partnerships can play.

Here are some top tips for establishing, developing, and managing strategic partnerships.

**Work out the areas where a strategic partnership makes sense**

The first step is to identify those areas of the business where it makes sense to have a strategic relationship.

If you have 10 different suppliers competing to...
sell you the same item—where there is little or no product differentiation, or where the airline dwarves a supplier in terms of size—then commoditization is the logical outcome.

However, where the relationship between a supplier and an airline is on a more equal basis, then the prospect of a strategic partnership is more likely.

Best business practice suggests that airlines should first segment the market to identify those areas that are ripe for building this deeper, more collaborative type of relationship.

Understand what your business objectives are and how your suppliers can help you achieve them

Establishing your business goals begins in the boardroom. Once decided, these goals must be communicated to all departments responsible for building and managing the supply chain.

Business objectives where suppliers can play a key role could include improving customer service by ensuring there are always enough baggage handlers available to meet peaks in demand. It could be that they help you reduce business risk, such as the huge knock-on costs of having valuable planes grounded rather than in the air generating revenue.

For example, cost is obviously an important factor when airlines agree maintenance contracts with engine manufacturers. But this has to be weighed up against the risk that choosing on price alone can sometimes be a false economy.

Ensure the partnership is a win-win

Understanding how a supplier can help you achieve your business goals is a vital first step down the road of establishing strategic partnerships, but it is insufficient on its own. Of equal importance is ensuring your goals are in line with the supplier’s. Without that understanding you may find that once the partnership is signed, the supplier is pulling in another direction. An example would be where you outsource an HR function and choose a supplier whose forte is to provide standardized processes at low cost rather than quality of service, which is what you as an airline want. If your goals are aligned with those of your supplier then the chances of that relationship being successful in the longer term are hugely enhanced. Where this is the case, this can lead to co-investment.

For a strategic partnership to work, it has to be a win-win situation for both airline and supplier.

To make sure business goals are aligned, strategic conversations should be held with potential suppliers before any contract award, as part of the selection or tendering process.

Agree non-price performance targets

Strategic partnerships are, by their nature, long-term. But a contract signed for five years—or as long as 12 years—isn’t worth the paper it is written on unless the non-price performance requirements within the contract are agreed. These non-price performance aspects are likely to be far trickier to agree upon than those relating to price. A particularly sensitive area—and the subject of many disagreements—is the supplier’s responsibilities in getting planes away on time.
Be prepared to renegotiate
During a contract—especially a lengthy one—it is inevitable that things will change, and what started off as a win-win situation might no longer suit one side. But rather than ending the contract and making any hasty decisions, a little give and take could sustain and even strengthen the relationship.

Work towards common goals
One of the most effective ways to cement and deepen relationships with suppliers is to get them to buy in to your goals. An example would be a temporary labour provider, who as part of their contract would be set a target for reducing the cost of providing staff. To incentivize the supplier, any savings made could be shared between the airline and the supplier. Cost savings tend to come about as a result of improving processes, so sitting down regularly with your strategic supplier to look at how processes can be improved is time well spent.

Drive good behaviour by identifying what is in a supplier’s own best interests
Build in incentives that encourage suppliers to do the right thing because it is in their own best interests. This is more important when an airline’s strategic partner—rather than a non-strategic supplier—is involved. Whereas it is relatively easy to get rid of a non-strategic supplier and bring in another, with strategic partners there is always the danger that, because the relationship cannot be untangled so easily, the supplier becomes complacent.

However, suppliers will generally be very keen to play their part in driving efficiencies if they see there is something in it for them. This could be a share of cost savings, or the opportunity to become a trusted partner to whom the airline looks for advice.

Making it clear to suppliers that you have an expectation of continuous improvement will help drive the sort of behaviour you want, but ensuring this behaviour is also in their best interests is likely to prove even more effective.

Good communication
From the pre-award stage, through the contract negotiation, to managing the relationship after it has been signed, the importance of good communication with your strategic partners cannot be underestimated.

Keeping the lines of communication open is especially important when things go wrong, as they inevitably will. When a supplier’s performance begins to drop off, this can give the impression that a supplier doesn’t care, whereas the reality is that communication has broken down. Regular meetings and/or telephone calls can make all the difference to maintaining that essential trust.
Train your suppliers but make sure you focus on specific outcomes

Training suppliers’ staff is a common feature of airline-supplier relationships. Many airlines also run supplier days.

While helping your suppliers understand more about the airline has some value, any training or education should be designed with specific goals and improvements in mind.

These goals could be related to improving operations, driving innovation or reducing cost.

Educating your suppliers in the airline’s ethics—for example on sustainability in the supply chain—could be another productive area, in helping both sides work together towards common goals.

Compare and agree performance data

Another important reason for regular meetings is to compare data on supplier performance, as invariably the supplier’s data will show a rosier picture than the airline’s.

Ironing out any discrepancies will avoid any misunderstanding, and working from a common set of data will provide a solid basis for an enduring and successful strategic partnership.

That said, with business process outsourcing, the lines between airline and supplier staff and systems can be blurred.

In this type of arrangement joint performance metrics can be the norm.

Don’t forget the human resources required

Managing a sophisticated procurement and supply chain operation, where there is a focus on long-term relationships, requires having the right talent in place. A three to five-year major deal with an important supplier could take up to six months: two months to understand the needs of the airline and three to four months to agree the details with a supplier.

While outsourcing of procurement is an option, doing this in-house and then managing the contract post-award requires expertise—both in the category of supply and in relationship management.

Don’t ignore the importance of talent in making, building and maintaining strategic partnerships.

Be aware of local conditions

A global partnership agreement has undoubted benefits, such as only having to deal with one supplier as well as economies of scale.

However, a contract based on what works, for example in Europe, doesn’t necessarily work in Africa, where a station manager has established relationships with cheaper local suppliers.

Forced into a globally-negotiated contract, handling costs in Africa may go up, leading to a fall in profits in that region.

When agreeing performance metrics, one solution is to give equal weighting to the performance of suppliers in all an airline’s regions—not just those in its biggest regions.

Thanks to AT Kearney, Nyras, AJW, ICG, and Capgemini for their help with this article.
Q&A

Airline industry profitability is on the up again. What developments can airlines make and how can they innovate to sustain and build their businesses?"

We asked five of our sponsors to respond >
A lot has been written about the impact of commoditization on the airline business. Competing on schedule and price alone is not always the best option. Brand differentiation and personalization of the offers an airline makes to its passengers, regardless of distribution channel, are critical for improved customer loyalty and lower customer acquisition costs. Airlines need to be agile and acquire the technological capability to support personalization. This agility brings speed to market and the power to make the right offer at the right time to the right person.

Business intelligence needs to be dynamically processed and leveraged in real time. The systems that an airline needs to meet such goals are available today because we, at JR Technologies, have spent the last few years developing NDC-enabled retailing platforms. These include all the tools necessary to support brand differentiation, merchandizing, offer and order management. We have also developed prototypes for the future ONE Order project. We have demonstrated over time the thought leadership to help airlines through the most complex transformation in the history of travel distribution. Choosing JR Technologies as your preferred NDC partner means you will reach your ROI and you will deliver innovative, profitable, and sustainable results to your passengers and partners alike.

www.jrtechnologies.com
MAKOTO NATSUME, President & CEO, Narita International Airport

According to many institutes, including IATA, aviation demand will be continue to grow in next 20 years, especially in the Asia-Pacific region.

I believe we have to provide secure and punctual transport services in all circumstances. Airport capacity is the one of most important factors for an airline’s profitability. From an airport perspective, development of an airport is a long-term project. However, aviation demands are changing so fast that capacity shortage may cause loss of airlines’ profitability. Expansion of terminal facilities will cost millions of dollars and will take a couple of years. That will also impact on airport user charges.

I believe one of best solutions is IATA’s Fast Travel program. According to IATA’s survey, we should not underestimate the positive impact of the program on terminal capacity. We are working closely with airlines for implementation of Fast Travel initiatives at Narita airport.

We are also working on our long-term project as well. The JCAB (Japan Civil Aviation Bureau) expects aviation demand will exceed total capacity of Tokyo airports—Narita and Haneda—shortly after the Tokyo Olympic Games in 2020. We have already started discussions with local communities to find the practical options for further airport expansion, including a third runway at Narita.

We would like to work with airlines and contribute to sustainable industry growth.

www.narita-airport.jp

NICK LEONTIDIS, CAE's Group President, Civil Aviation Training Solutions

With the increase in commercial air traffic expected to double over the next 20 years, airlines are seeking opportunities to innovate in order to protect their customer base, serve the growing demand (and expectations) of passengers, while remaining profitable.

As the industry’s global pilot training partner of choice, CAE counts more than 300 airlines among its customers and trains more than 120,000 airline pilots annually at every phase of their career, from cadets to captains. Over the years, we have not only helped create the standards that are the basis of pilot training today, but have helped our customers in attracting and recruiting top talent.

The upsurge in air traffic challenges the current pilot recruitment channels and development programs of airlines, calling for new and innovative pilot career pathways and training systems to meet the demand for professional pilots. Recruiting future captains that can master critical situations and develop faster will be the focus. To address the rising demand for professional pilots and to support the future training needs of our airline customers, we plan to release next generation training systems that provide data-driven training insights, which more effectively support airline training.

As we focus on creating and training the captains of tomorrow, we wish to contribute to the long-term success of our airline partners.

www.cae.com
With profitability rising across the industry, the trends in global e-commerce are showing an increase in cross-border trade. Goods are increasingly being sent directly to the end user.

Most forecasts show a three-fold increase in cross border e-commerce by 2020. At the same time, the number of connected wearable devices per person is growing exponentially. The current global average is already at 3.65 devices per person. Mobile internet connections are also getting stronger, requiring more energy (i.e. battery power) than ever before.

Safety is the number one priority for the airlines industry—and central to its continued success—but based on these trends in mobile technology, we believe regulations banning lithium-ion-powered devices from passenger aircraft cargo bays will not be enough.

Instead, extra fire safety measures will need to be taken. The role of airfreight containers in this is crucial. Teijin Aramid, producer of the fire-resistant para-aramid fiber Twaron, works closely with container manufacturers and end-users to create containers that are lighter, stronger and, most importantly, capable of containing fire for at least four hours.

This allows aircraft pilots to find a suitable airport to safely land the aircraft in case of a fire in the cargo bay.

Aviation must stay ahead of the game when it comes to safety — retaining the trust of customers is vital if the industry is to thrive.

KOEN BOENDERMAKER, Marketing & Sales Manager Aviation, Teijin Aramid

We see our role as a strong, innovative and proactive partner assisting airlines to continue to be successful in the years to come.

For instance, we offer smart solutions for the following upcoming important trends and exigencies:

Airlines should enhance their customer service processes not only for high-yield customers but also during operational flight irregularity situations, e.g. flight cancellations or delays, challenges which are never preventable. A modern, customer-orientated service is key — it makes the difference between upsetting travelers who you might eventually lose as customers and having well-informed, insightful passengers.

We strongly recommend airlines establish new payment processes, e.g. virtual card issuing or accepting alternative payment methods. Today, it is vital to offer holidaymakers and business travelers additional convenience and more choices during the payment process for their online bookings.

Last but not least, a powerful loyalty program is crucial for obtaining a high level of customer retention.

We can assist airlines by embedding different payment tools so they can get to know their customers better — as well as offer customers individual suitable benefits, e.g. meal choices, lounge access or personalized check-in at airports.

ECKART REICHE, Head of Sales Airlines, Travel and Mobility, Wirecard

www.teijinaramid.com

www.wirecard.com
JR Technologies

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PASSENGER CENTRIC DISTRIBUTION SYSTEMS

- Offer & Order Management
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- Business Intelligence & Analytics
- Corporate Booking Tools
- Travel Agency Portals

COST EFFICIENCY
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AGILITY
Real time BI and omni-channel airline strategies.

VELOCITY
Rapid growth and speed to market.

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JR Technologies

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YEAR ESTABLISHED
2002

NUMBER OF STAFF
200

NEW BUSINESS
george@jrtechnologies.com
t.tsinonis@jrtechnologies.com

CLIENTS
IATA
Inselair
Sky Bird Travel and Tours
Major airlines

PRODUCTS AND SERVICES
- Offer management
- Order management
- Rich content & merchandising
- Corporate booking tools
- Payment solutions

- Travel agency portal
- Personalization
- Dynamic pricing

WHY WORK WITH US?
JR Technologies has been a leader in NDC from its inception and was amongst the first companies to become NDC level 3 certified. Therefore, the team has in-depth knowledge which is key in assisting airlines (no matter how large or small) in transitioning from their current distribution strategy to an NDC-enabled distribution strategy. JR Technologies’ product architecture is designed with this in mind and we use the term “serving a market segment of one” to convey the power and diversity this transformation can bring to your company.

We pride ourselves in innovation. In partnership with global leaders we offer payment solutions which will not only be secure and simple, but practical and cost-efficient. We offer airlines the capability to exert full supplier control and the ability to offer the right product to the right customer at the right time.

We offer this through real-time business intelligence that drives offer personalization.

The JRT NDC solution is interline and ONE Order capable. Choose JR Technologies as your partner on this journey.
It all started with one fuel drum.

Scorching heat. Biting cold. Wind and rain. At an airport, exposed to the elements, nothing and no one takes a break. Fuel, contained in a drum, is loaded onto a small auto-tricycle and manually pumped into an airplane’s fuel tanks. A lone man, energetically attends to the task at hand. He is 38-year-old Sadao Minami, the Mainami Group’s founder.

The time is 1952. Japan is finally emerging from the hard years following the end of World War II. It is the dawn of private airlines, and two years down the road Japanese airlines will be flying to worldwide destinations. For the Mainami Group, expansion started with one fuel drum.
MAINAMI KUKO SERVICE COMPANY

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KEY PERSONNEL
Hiro Minami, Director

YEAR ESTABLISHED
1952

NUMBER OF STAFF
300

NEW BUSINESS CONTACT
minami@mainami.co.jp

CLIENTS
Wide range of domestic and international airlines

PRODUCTS AND SERVICES
- Refuelling service
- Total aviation support service
- Sales of oil products
- Sales of aerospace equipment

WHY WORK WITH US?
There is more to refuelling than you may think. It requires considerable experience and extensive training to achieve high safety levels at all times.

In our 60 years of refuelling history we have received many awards, and for causing no delays we received the Award of Excellence.

Our safety records are proven, our refuelling staff are professionally trained, and our refuelling vehicles are state of the art.

Mainami Kuko Service can be relied on to reduce the cost of delays and risk of accidents by providing an unparalleled level of aircraft refuelling. Never content solely with our past achievements, Mainami Kuko Service eagerly seeks greater challenges.
Teijin Aramid

Strengthening the aviation industry

Human Chemistry, Human Solutions
TEIJIN ARAMID

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KEY PERSONNEL
Gert Frederiks, CEO
Jan Roos, CTO
Koen Boendermaker, Marketing & Sales Manager Aviation

YEAR ESTABLISHED
1982

NUMBER OF STAFF
13,300

NEW BUSINESS
koen.boendermaker@teijinaramid.com

CLIENTS
More than 1000+ clients

PRODUCTS AND SERVICES
- Twaron para-aramid fibers and pulp
- Enhancing heat protection, weight reduction, and durability of materials
- Composite panels for ULDs
- Tires
- Brakes
- Electrical/Optical cabling
- Containment belts
- Leading edges

AREAS OF INVOLVEMENT
- Aviation
- Automotive
- Protection & defense
- Oil & gas
- Telecom

WHY WORK WITH US?
With the number of devices containing lithium-ion batteries growing exponentially, transport and passenger carriers need to rethink how they can best mitigate the risk of self-igniting batteries. Teijin Aramid, producer of the super-strong, light and fire-resistant para-aramid fiber Twaron, works closely with container manufacturers and end-users to create containers that are lighter, stronger and, most importantly, capable of containing fire for at least four hours.

Teijin Aramid offers unique materials for the aviation sector — its para-aramid fiber Twaron is super-strong, lightweight and heat- and fire-resistant. We work closely with MACRO industries, manufacturers of freight containers (or ULDs). The ULDs with MACRO-Lite panels are built with reinforced composite materials that make the containers fire-resistant for this crucial period of more than four hours, according to recent testing.

The usage of Twaron makes the ULDs lighter and more durable than standard aluminum containers. What’s more, Twaron is five times stronger than steel at the same weight.

Freight containers with Twaron weigh less, meet higher safety standards, require fewer repairs, and they also have a lower environmental impact.

MACRO-Lite can easily be used as a replacement for aluminum panels, and allows fleet operators to easily upgrade containers.
NARITA INTERNATIONAL AIRPORT CORPORATION

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Makoto Natsume, President and CEO
Masaki Saida, Senior Executive Vice President
Futoshi Osada, Executive Vice President, Corporate Planning
Hideki Hayashida, Senior Vice President, Airport Marketing
Kenji Konda, Senior Vice President, Corporate Finance
Masakazu Kimura, Senior Vice President, Airport Development

YEAR ESTABLISHED
1966 (Established as airport authority)
1978 (airport opened)
2004 (privatized)

NUMBER OF STAFF
676 (NAA)

ANNUAL TURNOVER
JPY 218 billion (NAA Group)

NEW BUSINESS CONTACT
contents.narita-airport.jp/b2b/naa_contact_en

CLIENTS
All Nippon Airways
Japan Airlines
Delta Air Lines
United Airlines
Jetstar Japan
90 other airlines

AREAS OF INVOLVEMENT
- AGM
- Airport development
- Baggage Infrastructure Group
- Passenger experience

PRODUCTS AND SERVICES
- Development and operation of Tokyo, Narita International Airport

WHY WORK WITH US?
Narita International Airport is Japan’s premier and primary gateway, which processes almost 50% of the nation’s international traffic.

Since we have achieved expansion of airport capacity to 300,000 annual slots, new routes have been developed and new airline partners have joined. We also opened the new terminal 3 in April 2015 for low-cost carriers.

To meet the region’s vigorous demand, we have already kicked off discussions with local communities and JCAB for further expansion of the airport, including a third runway.

Under intensifying competition, partnerships between airlines and airports are becoming more and more important. We are keen to implement IATA’s Fast Travel initiatives such as the self-bag drop function and the Smart Security program.

We are working closely with airlines at Narita to find the best solutions for improving the customer experience and making operations even more efficient. Narita is always striving to build on its status as one of East Asia’s key international gateways.
AIRCRAFT PRODUCTION
2

BAGGAGE SERVICES
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Website</th>
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<tbody>
<tr>
<td>AMADEUS IT GROUP, S.A.</td>
<td><a href="http://www.amadeus.com">www.amadeus.com</a></td>
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<tr>
<td>ARINC INCORPORATED</td>
<td><a href="http://www.rockwellcollins.com">www.rockwellcollins.com</a></td>
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<td>BROCK SOLUTIONS, INC.</td>
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<td>NETTRACER, INC.</td>
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<td>QUANTUM AVIATION SOLUTIONS, INC.</td>
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<td>RIMOWA ELECTRONIC TAG GMBH SIEMENS POSTAL, PARCEL &amp; AIRPORT</td>
<td><a href="http://www.bag2go.aero">www.bag2go.aero</a></td>
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CARGO

Incorporating e-cargo, cargo standards, unit load devices, cargo XML
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<td>cargocomposites.com/</td>
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LIFECONEX LLC
www.lifeconex.com

MERCATOR
www.mercator.com

MIAMI-DADE AVIATION DEPARTMENT / MIAMI INTERNATIONAL AIRPORT
www.miami-airport.com

NORDISK AVIATION PRODUCTS
www.nordisk-aviation.com

PALNET GMBH AIR CARGO PRODUCTS
www.palnet-acp.com

PHARMSOL GMBH
www.pharm-sol.com/

QSL CONSULTORES
www.qsl.cl

SATCO, INC.
www.satco-inc.com

SENSITECH INC.
www.sensitech.com

SKYCELL AG
skycell.ch

SURE DESTINY
www.suredestiny.com/

TAIWAN FYLIN INDUSTRIAL
www.fylin.com.tw

TEIJIN ARAMID B.V.
www.teijinaramid.com/

THE CARGO FLIGHTS CO., LTD.
www.thecargoflights.com

TRAVEL TECHNOLOGY INTERACTIVE S.A.
www.tifinteractive.com/

UNISYS CORPORATION
www.unisys.com/transportation

VAN RIEMSDIJK ROTTERDAM B.V. (VRR)
www.vrr-aviation.com

VCARGO CLOUD PTE LTD
www.vcargocloud.com

WCA, LTD.
www.wcaworld.com

WISERTECH GLOBAL LIMITED
www.wiserechlobal.com/

WISSKIRCHEN HANDLING SERVICES GMBH
wilog.de

YOUREDI LTD
www.Youredi.Com

ZODIAC AIR CARGO EQUIPMENT B.V.
www.zodiacaerospace.com/en/zodiac-aircargo-equipment
Chapter 4: Engines

Incorporating engineering and maintenance
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<td>Smbc Aviation Capital</td>
<td>smbc.aero</td>
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WIRECARD
Mr Eckart Reiche, Head of Sales Airlines, Travel and Mobility

+49 89 4424 1680
+49 89 4424 2023
mailto:travel@wirecard.com

Wirecard, headquartered near Munich in Germany, is a global technology group that supports companies in accepting electronic payments. This includes payments via credit card as well as alternative payment methods.

With its global acquiring license, Wirecard can serve airlines with all their payment needs wherever they operate and want to accept payments — may it be on the ground, in the air, online or offline. With its issuing license, Wirecard provides standard or tailor-made customer loyalty programs paired with new and innovative payment functions either as prepaid or charge card programs. All payment functions are coupled with state of the art fraud prevention tools to ensure the highest levels of security. Through Wirecard’s analytic and monitoring tools, airline customers always have online access to their data in real time.

For the payment processing of the travel agency community worldwide, Wirecard connects to the Bank Settlement Plan (BSPs) and Airlines Reporting Corporation (ARC) via its multi-channel payment gateway. This allows airlines to process ticket sales in a faster and easier way, as this is the most widespread system in the world for simple processing of airline ticket sales. In order to offer travelers additional convenience and more choice during the payment process for their online booking, airlines are implementing Wirecard’s technology solutions via both channels.
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6

FLIGHT OPERATIONS

Incorporating aircraft recovery, paperless aircraft operations, meteorological
PETROLIMEX AVIATION

ops.fuelorder@petrolimex.com.vn
www.pa.petrolimex.com.vn
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Petrolimex Aviaton is an aviation fuel supplier in Vietnam airports, established by Vietnam National Petroleum Group (Petrolimex Vietnam). Petrolimex Aviation is well recognized by customers for its excellent service, competitive price, prompt responding, and complying with all requirements of fuel quality.

We comply with all regulations of the International Civil Aviation Organization (ICAO) and The Aviation Fuel Quality Requirements for Jointly Operated Systems, latest issued by The Joint Inspection Group (JIG), Def Stan 91-91.

OUR OBJECTIVES
Becoming a top-class aviation fuel supplier with excellent services and highest safety.

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Da Nang International Airport (DAD)
Noi Bai International Airport (HAN)
Cat Bi International Airport (HPH)
Phu Quoc International Airport (PQC) (under construction)
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AIR TOTAL
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ARROW PETROLEUM COMPANY
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ASSOCIATED ENERGY GROUP
www.aegfuels.com/about

ATIO GROUP
www.atiogroup.com.mx/

ATMOS INTERNATIONAL
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AURORA AVIATION SA
www.aurora-aviation.aero

AVFUEL CORPORATION
www.avfuel.com

AVIATION QUALITY SERVICES GMBH
www.aviation-quality-services.com

AVIATION SERVICES MANAGEMENT FZE
www.asm.services.aero

AXION ENERGY ARGENTINA S.R.L.
www.axionenergy.com

BALTIC GROUND SERVICES
www.bgs.aero

BASF SE
www.basf.com

BETA FUELING SYSTEMS
www.betafueling.com

BHARAT PETROLEUM CORPORATION LTD.
www.bharatpetroleum.in

BOC AVIATION LIMITED
www.bocaviation.com

CALTEX AUSTRALIA PETROLEUM PTY., LTD.
www.caltex.com.au

CASTLETON COMMODITIES INTERNATIONAL, LLC
www.cci.com

CEPS PO
www.nspa.nato.int/en/organization/ceps/ceps.html

CEPSA COMERCIAL PETRÓLEO SAU (CEPSA)
www.cepsa.com

CF PARTNERS (UK) LLP
www.cf-partners.com
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JR Technologies’ product architecture is designed with this in mind and we use the term “serving a market segment of one” to convey the power and diversity this transformation can bring to your company.

We pride ourselves in innovation. In partnership with global leaders we offer payment solutions which will not only be secure and simple, but practical and cost efficient for all clients too.

We offer airlines the capability to exert full supplier control, and the ability to offer the right product to the right customer at the right time through real-time business intelligence that drives offer personalization.

The JRT NDC solution is interline and ONE Order capable. Choose JR Technologies as your partner on this journey.
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transportation

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VIASAT, INC.
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WORLDTICKET A/S
www.worldticket.net

ZEBRA TECHNOLOGIES
www.zebra.com
DATALEX
Abram Richman, Product Architect
info@datalex.com
www.datalex.com
+1 770-255-2400
Datalex, Block U, EastPoint, Dublin D03 H704, Ireland.

Datalex is a market leader in digital commerce for travel retailers. The Datalex Commerce Platform is used by some of the world’s most innovative airline retail brands to drive revenue and customer experience. Its customers include Aer Lingus, Air China, Air Malta, Air Transat, Brussels Airlines, Copa Airlines, Hainan Group, HP Enterprise Services, IBM, JetBlue Airways, Lufthansa Group, Philippine Airlines, SITA, Swiss International Air Lines, Virgin Atlantic and Virgin Australia. The company is headquartered in Dublin, Ireland, with five office locations across Europe, the USA and China. Datalex is a publicly listed company and trades on the Irish Stock Exchange (ISE:DLE).

Airline customers use the Datalex Commerce Platform to dynamically control and optimize all air and ancillary offers to more than one billion shoppers on every device, across every digital sales channel and at every touchpoint in the travel journey, covering every corner of the globe. The platform allows airlines to realize the full retail opportunity with one common system as the basis for every offer and every order.

Datalex is certified to the highest IATA NDC standards (Level 3) and is an active member of the IATA ONE Order Taskforce.
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<thead>
<tr>
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<th>Website</th>
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<td>VIASAT, INC.</td>
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WESTMINSTER AVIATION SECURITY SERVICES LIMITED
www.wass-ltd.com/
With the number of devices containing lithium-ion batteries growing exponentially, transport and passenger carriers need to rethink how they can best mitigate the risk of self-igniting batteries. Teijin Aramid, producer of the super-strong, light and fire-resistant para-aramid fiber Twaron, works closely with container manufacturers and end-users to create containers that are lighter, stronger, and capable of containing fire for at least four hours.

Teijin Aramid offers unique materials for the aviation sector — its para-aramid fiber Twaron is super strong, lightweight and heat- and fire-resistant. In particular, we work closely with MACRO Industries, manufacturers of freight containers (or ULDs). The ULDs with MACRO-Lite panels are built with advanced reinforced composite materials that make the containers fire-resistant for that crucial period of more than four hours, according to recent testing. The usage of Twaron makes the ULDs significantly lighter and more durable than standard aluminum containers. Twaron is five times stronger than steel at the same weight, making the containers extremely durable.

Freight containers with Twaron weigh less, meet higher safety standards, require fewer repairs, and have lower environmental impact. MACRO-Lite can easily be used as a replacement for existing aluminum panels, and it allows fleet operators to easily upgrade their containers.
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