

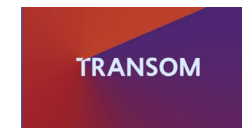


Sustainability Webinar
April 29, 2021 - 2pm CET

People ... Planet ... Prosperity



In collaboration with sustainability partners



Agenda

1. TIACA's 1st Sustainability Industry Survey Report
2. Spotlight on:
 - #People
 - #Planet
 - #Prosperity
3. Conclusions and the path forward



Scope of TIACA's Sustainability program

- People
- Planet
- Prosperity

Enabled by

- Innovation
- Partnerships



TIACA's 1st Sustainability Industry Survey

Celine Hourcade

Founder and Managing Director
Change Horizon



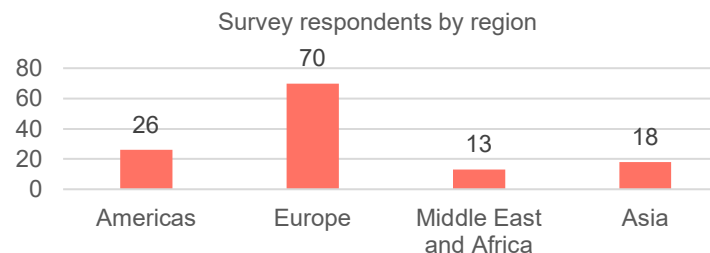
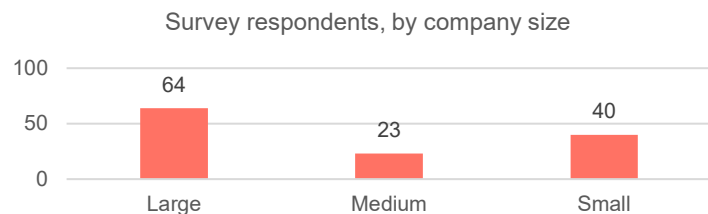
Accelerating sustainable transformation of air cargo – from talks to actions

Doing it right for people, planet and prosperity

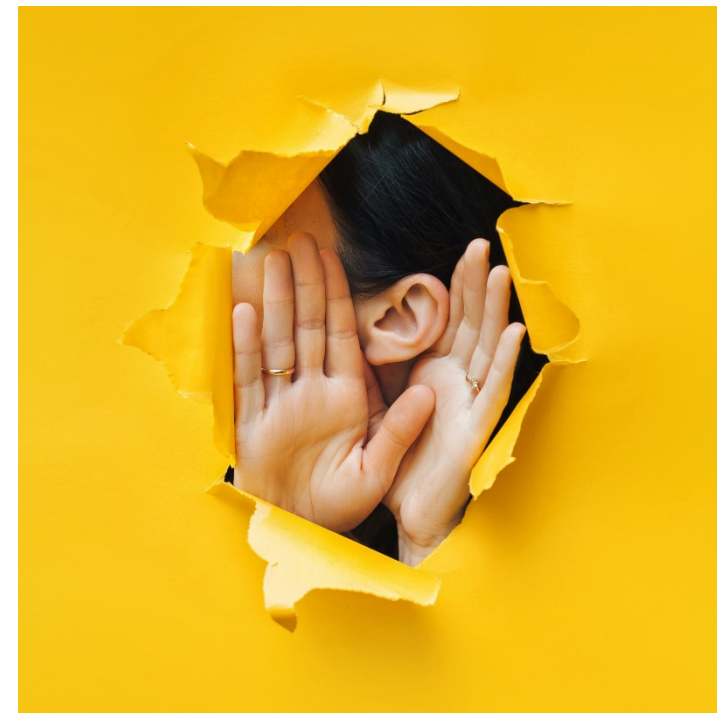
Celine Hourcade, Change Horizon – TIACA Sustainability4Cargo webinar, 29 April 2021

1st Air Cargo Industry Sustainability Survey

- **127 answers** received from 19 October to 1 December 2020 from airlines, airports, ground handlers, forwarders, shippers, solution providers, consultants, associations, media



- We set the baseline and will monitor progress annually



There is no common definition of sustainability, and it is OK

- Across the air cargo industry, the concept of sustainability varies considerably



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon
Most used words in definitions given by respondents, answering the question "Please indicate the definition of Sustainability in use within your company if any"

- TIACA's sustainability vision : doing good for the planet, the people and the business, enabled by innovation and partnerships

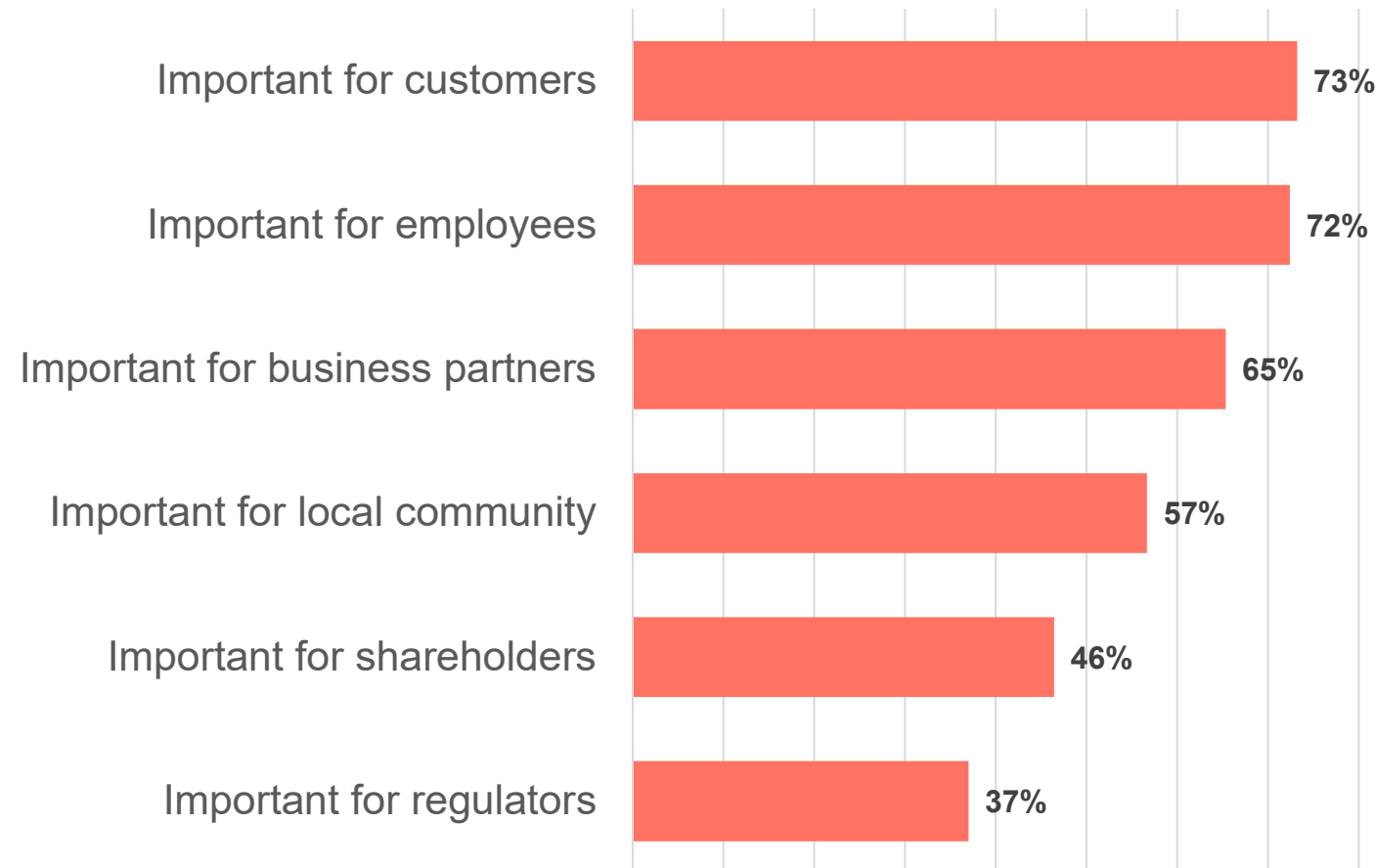


Sustainability is good for business

- 79% of respondents believe making tangible progress in sustainability matters will or would impact positively their company's **reputation**
- 62% think their organization will be more **attractive**
- 39% believe progressing sustainability agenda will positively impact their **bottom-line**
- In their comments, survey participants mentioned regularly the positive impact on their **credibility**

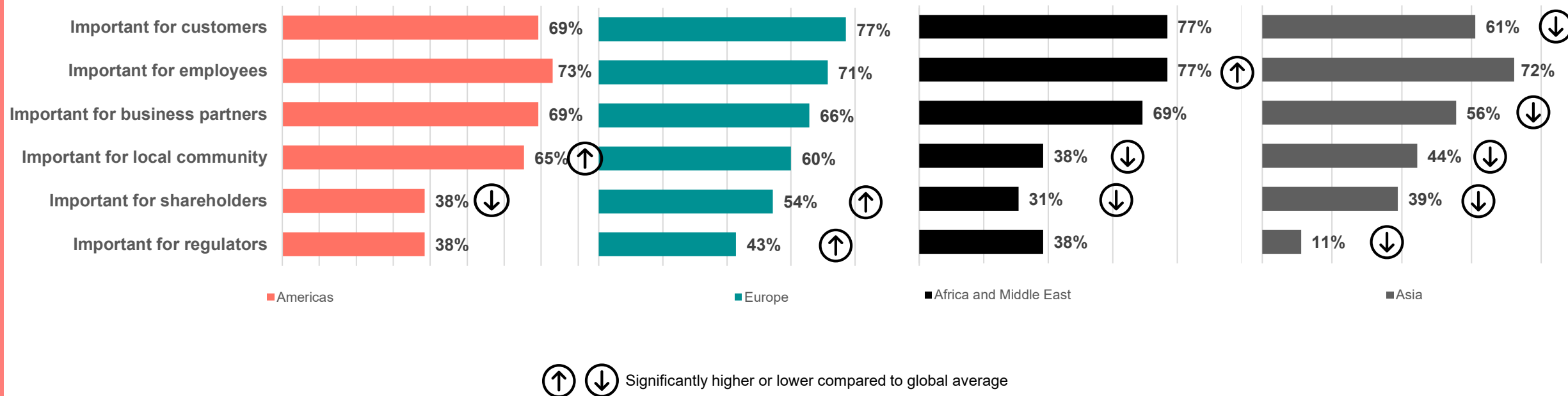


Sustainability is important for customers and employees



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question "Why does or should sustainability matter to your company?"

Sustainability matters, but drivers differ from one region to another



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question "Why does or should sustainability matter to your company?", analyzed by region

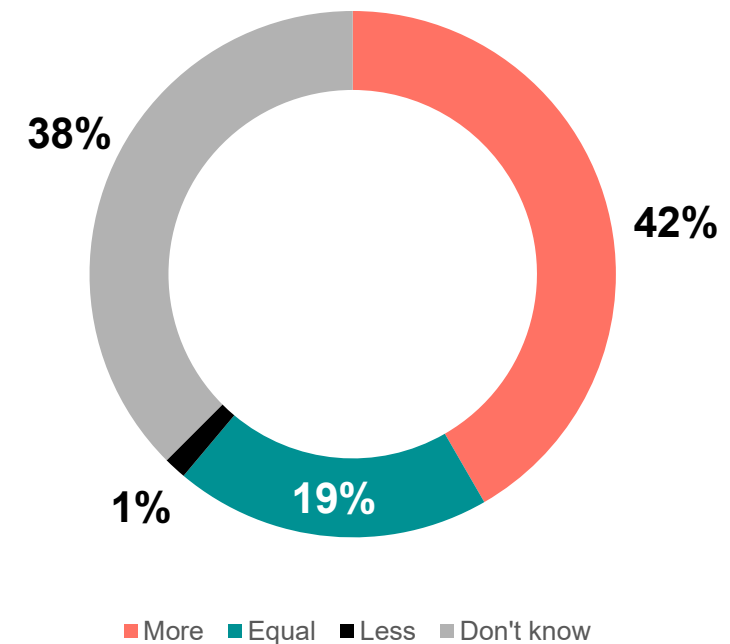
Sustainability matters more than ever before

- 63% say sustainability was even more important in 2020 than it was in 2019
- 42% indicate their company's sustainability budget has increased in 2020 compared to 2019
- 37% declare COVID-19 crisis had a positive impact on their corporate sustainability strategy

” It took away the focus briefly, but is coming back more important than before – a large European forwarder

” It forced us to focus on survival – an airline in Asia Pacific

How is your company's sustainability budget compared to previous year?



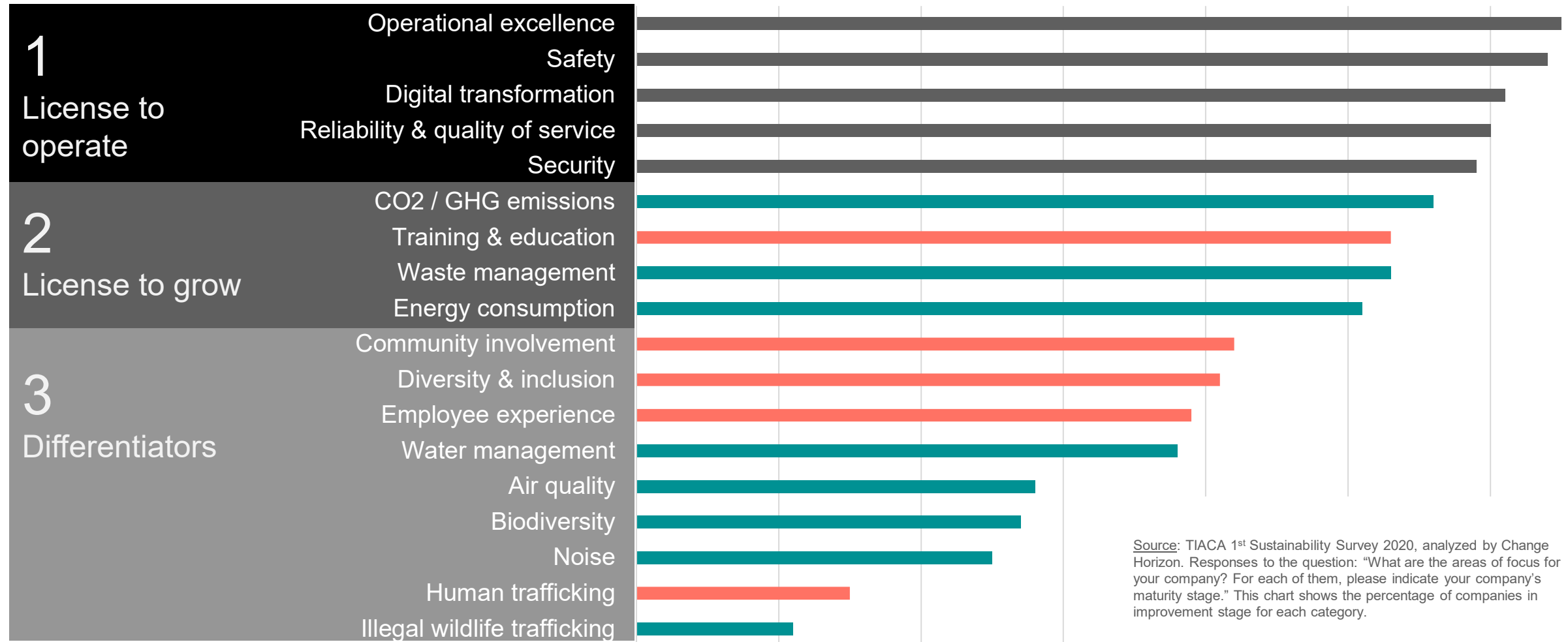
Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon.

CHANGEHORIZON



Top areas of focus

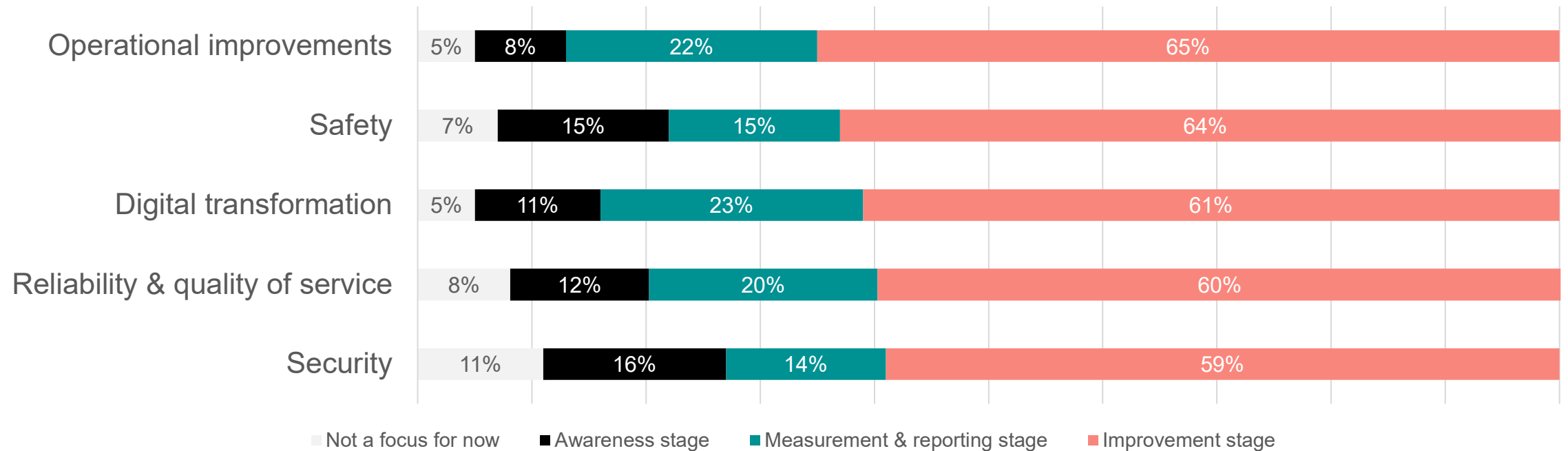
0 10 20 30 40 50 60



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "What are the areas of focus for your company? For each of them, please indicate your company's maturity stage." This chart shows the percentage of companies in improvement stage for each category.

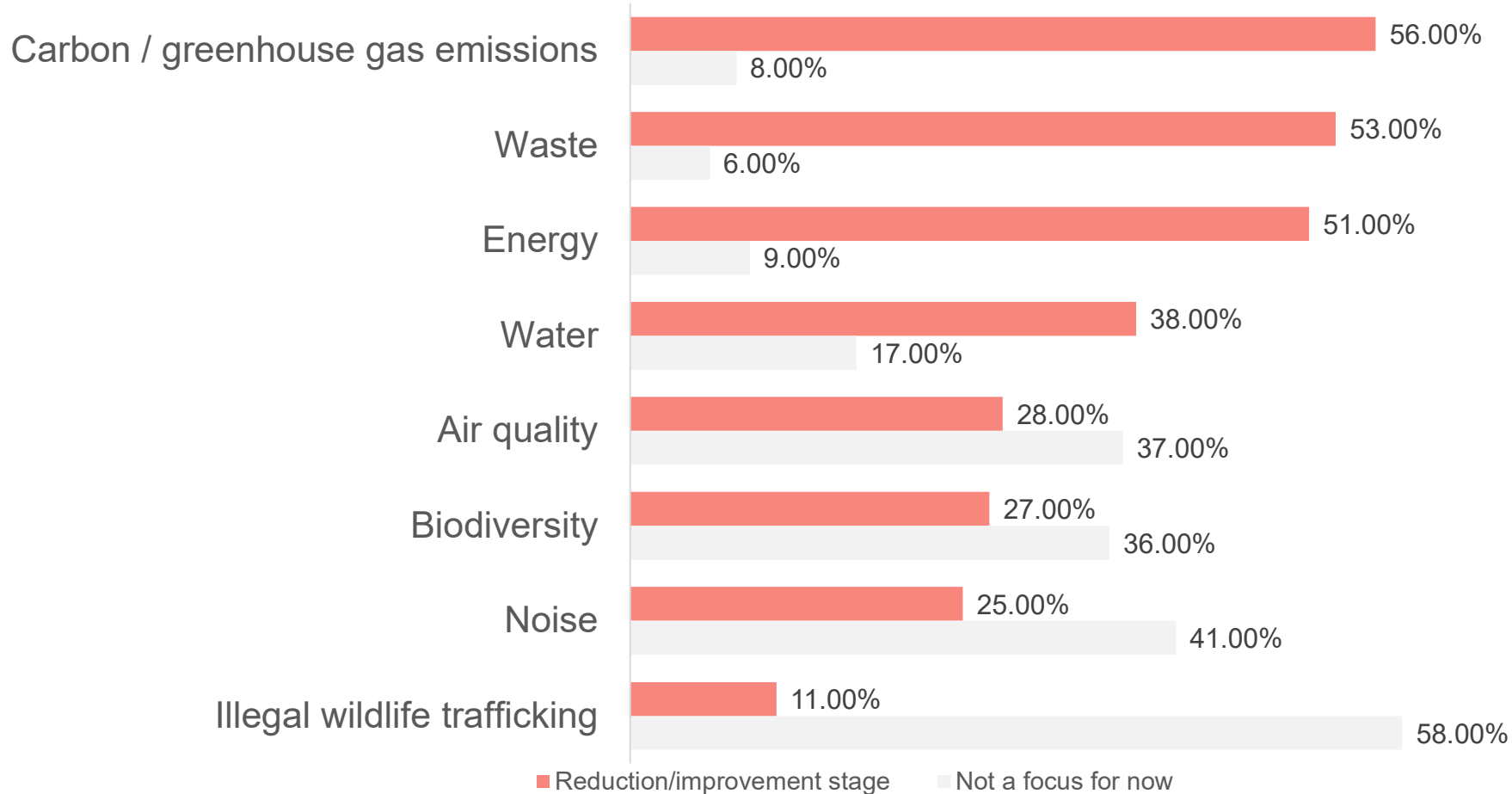
#Prosperity: to be efficient and profitable, the air cargo industry needs to be fully digital

- 61% saying they have a digital transformation plan in place. It is time for the other 39% to accelerate the pace!



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "What are the areas of focus for your company? For each of them, please indicate your company's maturity stage."

#Planet: the air cargo industry is committed to reduce its environmental footprint



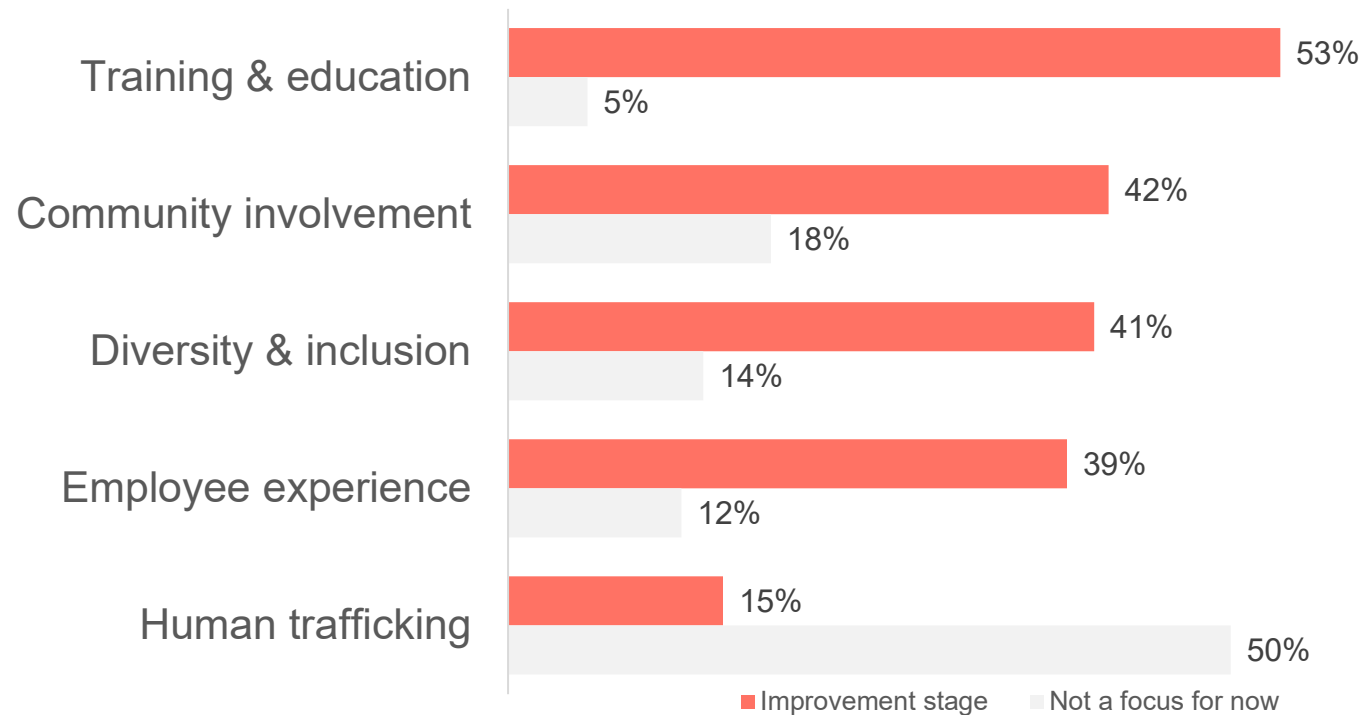
Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "What are the areas of focus for your company? For each of them, please indicate your company's maturity stage."

A lot of industry initiatives help the air cargo industry to improve their environmental footprint



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "Which initiative(s) does your company participate in?"

#People: only 53% of the air cargo industry have training and education programs in place



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "What are the areas of focus for your company? For each of them, please indicate your company's maturity stage."



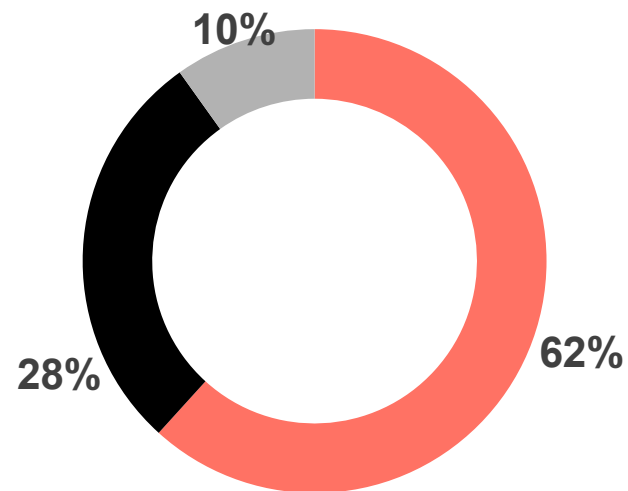
Sustainability matters: from talks to actions

- Direct support from the CEO: 91%
- Corporate strategic priority with concrete actions: 81%
- Embedded in company's DNA: 78%
- Strategy in place: 75%
- Part of the procurement process: 69%
- Dedicated team in place: 61%
- Dedicated budget: 43%

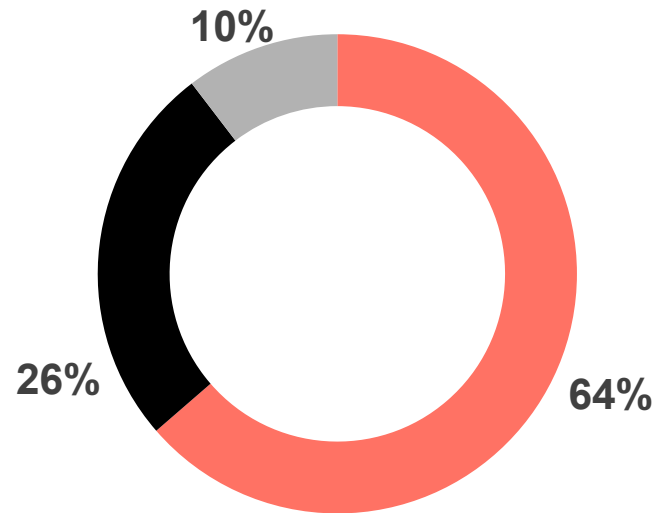


Targets setting, measurement, reporting

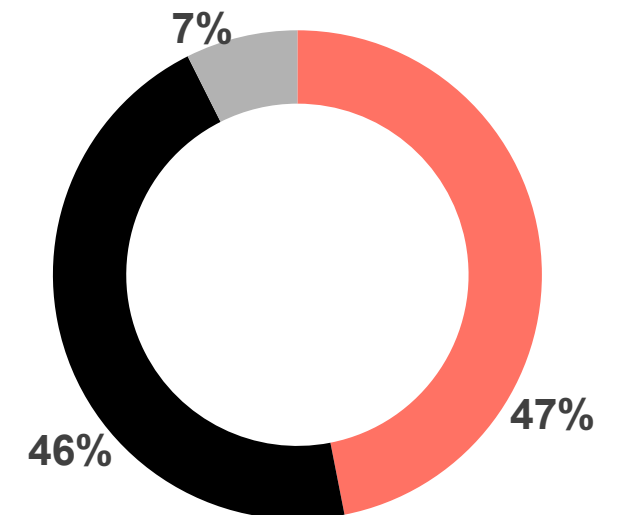
Companies with **targets** set



Companies **measuring** progress



Companies producing sustainability **reports**



■ Yes ■ No ■ I don't know

Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon.

TIACA as a role to play to accelerate the sustainable transformation of the air cargo industry

Launching or supporting industry initiatives

1

Developing of a global industry commitment with a roadmap towards long-term and short-term goals

2

Promoting the value of air cargo and its contribution to SDGs

3

Raise awareness on the importance of sustainable transformation of air cargo

Supporting companies

1

Identifying business partners to work with (Independent validation program, Networking)

2

Help promoting own initiatives, innovative ideas and best practices (Events & outreach, Awards)

3

Identifying sustainability initiatives to join (Knowledge platform, Industry partnerships)

Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon.



CHANGEHORIZON

Independent consulting company helping organizations in the **aviation and logistics** industries:

- Established companies
- Start-ups
- Industry associations
- International organizations

We are focused on **generating added value, success and capability development** for our customers:

- Strategy & business development
- Stakeholder engagement & outreach
- Change management
- Sustainability vision & projects
- Transformation & innovation

Our services are **flexible and tailored** to achieve agreed and specific goals, working closely with client teams:

- Sparring partnership to executives
- Consultancy and advisory services
- Research and insights
- Interim management
- Hands-on support
- Mentorship



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2. Spotlight on: #People #Planet #Prosperity

Presenters



Liana Coyne
Coyne Aviation



Glyn Hughes
TIACA



Stephane Noll
Champ
Cargosystems

2. Spotlight on: #People

Presenter



Liana Coyne
Coyne Aviation



#People: the case for prioritization

- TIACA 2020 Sustainability Survey: 14% of respondents said diversity & inclusion 'not a focus' & only 53% have training & education programs
- “Diversity is being invited to the party. Inclusion is being asked to dance.”¹
- Social justice aside, diversity & inclusion pay dividends:²
 - Greater diversity in the workforce results in greater profitability and value creation
 - There is a statistically significant correlation between diverse leadership and better financial performance
- Every business is a people business: we need to invest in people

1. Verna Myers, www.vernamyers.com; 2. <https://www.mckinsey.com/business-functions/organization/our-insights/delivering-through-diversity#>

#People: the research

Teams that are gender, age and ethnically diverse make better decisions up to 87% of the time¹

Diverse companies enjoy 2.3 times higher cash flow per employee²

Organizations with inclusive leaders are 70% more likely to have captured a new market in the past 12 months.³

Inclusive companies are 1.7 times more likely to be innovation leaders in their market.⁴

Employees that have worked with an inclusive leader demonstrate 81% greater engagement and loyalty.⁵

#People: be
the change
you want to
see

Engagement, connection: respect &
value each individual

Sponsorship & mentoring: formal
and informal

Training: on-the-job, in the
classroom and online

Fair access to opportunities: hiring,
while working and for promotion

Best practice: what can you apply in
your organization?

#People: every
journey begins
with a single
step

- Ideas & inspiration:
 - <https://hbr.org/2020/05/diversity-and-inclusion-efforts-that-really-work>
 - <https://www.aperianglobal.com/leaders-diversity-inclusion-5-lessons-top-global-companies/>
 - <https://www.shrm.org/hr-today/news/hr-magazine/0418/pages/6-steps-for-building-an-inclusive-workplace.aspx>
 - <https://www.forbes.com/sites/forbeshumanresourcescolumnist/2019/02/04/what-an-inclusive-workplace-actually-looks-like-and-seven-ways-to-achieve-it/>
- Women in Aviation and Logistics Pledge

Liana Coyne, COO, Coyne Airways
liana@coyneair.com

2. Spotlight on: #Planet

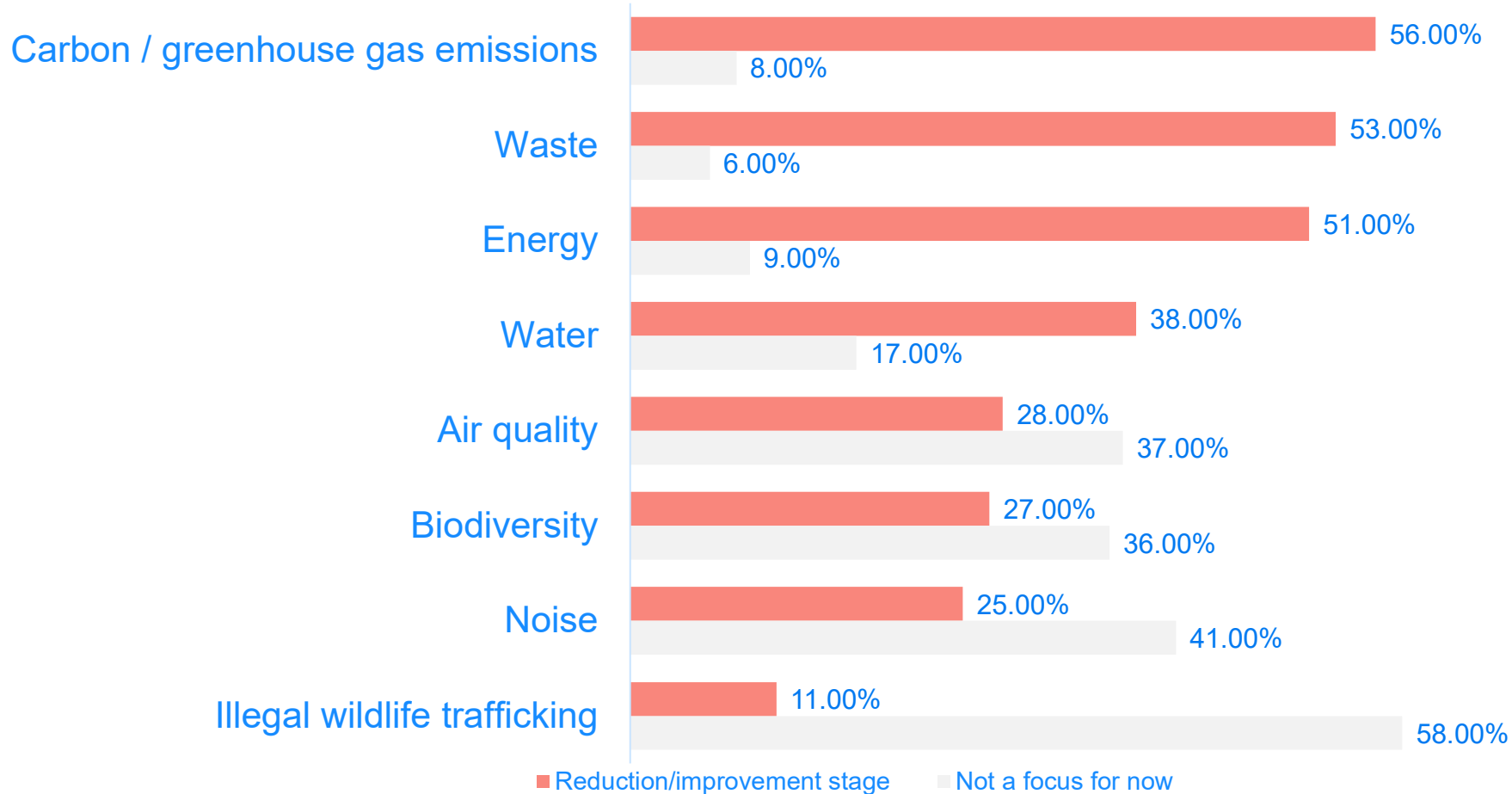
Presenter



Glyn Hughes
TIACA



#Planet: the air cargo industry is committed to reduce its environmental footprint



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "What are the areas of focus for your company? For each of them, please indicate your company's maturity stage."

A lot of industry initiatives help the air cargo industry to improve their environmental footprint



Source: TIACA 1st Sustainability Survey 2020, analyzed by Change Horizon. Responses to the question: "Which initiative(s) does your company participate in?"



2. Spotlight on: #Prosperity

Presenter



Stephane Noll
Champ
Cargosystems



The business opportunity

Sustainability is an opportunity to improve your business performance.
Through digitalization you can optimize your processes.



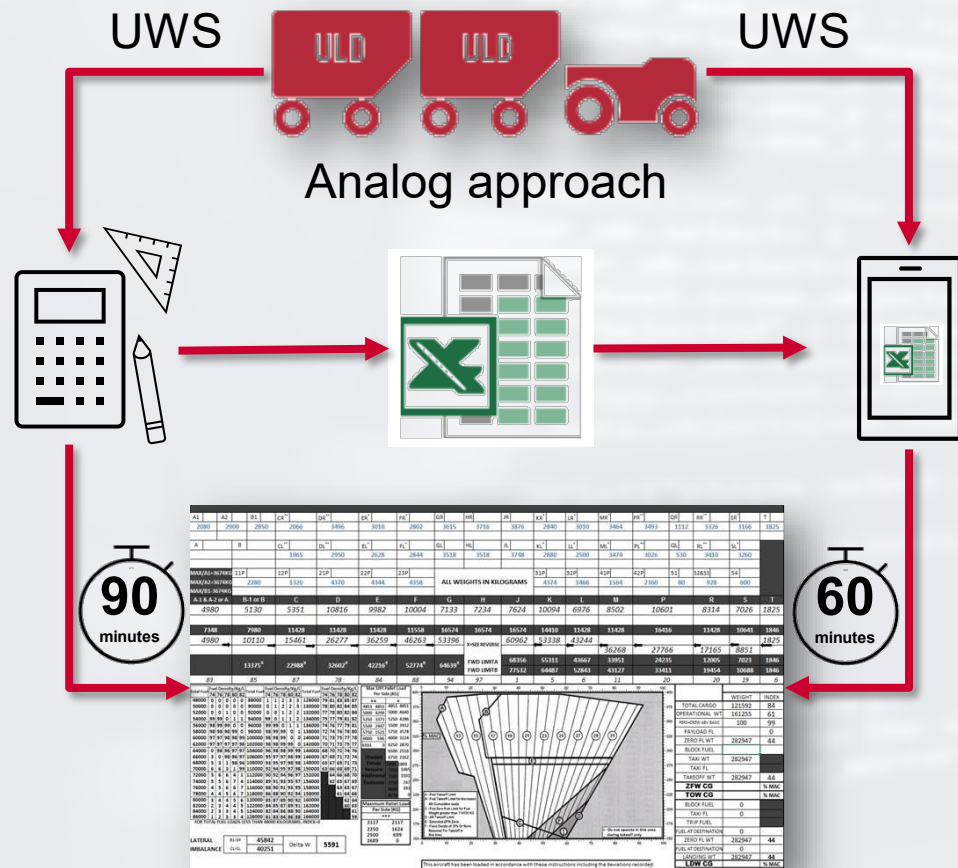
Challenge status quo



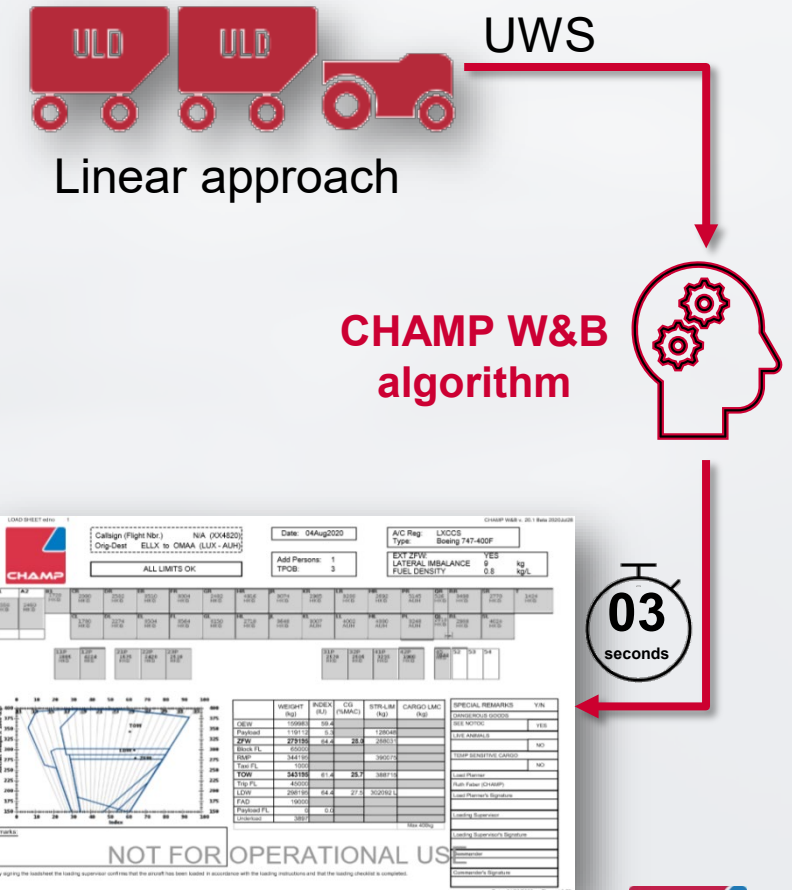
Improve performance

The business opportunity

Digitalizing Weight & Balance for greater efficiency.



Analog
VS.
Digital





3. Conclusions and the Path Forward

Presenter



Steven Polmans
Chair, TIACA

Executive Summit 2021

Co-located with transport logistics Americas

- Joint plenary sessions
- Joint networking opportunities

Means more reach to industry players

Focus on innovation and the future

100% refund for cancellation due to COVID-19



Messe München

transport
logistic
AMERICAS

supply chain forum



Executive
Summit



On Course for the Future
The 2+2 on Innovation in Logistics

September 21–24, 2021
San Francisco, USA



2021 Call for Hall of Fame Nominations

We are looking for exceptional individuals that:

- go **above** and beyond **everyday**;
- **demonstrate** an **innovative** spirit;
- **show** outstanding **leadership**; and
- **contribute** greatly to the **development** of the **air cargo** industry

Nomination Deadline: July 15th





2021 Sustainability Awards



Suggested applicants support:

- social welfare
- economic development
- environmental impact
- innovation
- partnership

Exclusive Award Sponsor



Application Deadline: August 15, 2021



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SECRETARIAT@TIACA.ORG

Coming soon!

- ICAO Safe Supply Chain Virtual Training Courses 2021
 - June 14-18 (EST)
 - June 22 – 25 (EST)
 - August 17-20 (CET)
 - October 12-15 (EST)
 - December 7-10 (CET)
- TIACA Executive Summit – September 21-24

