



GROUPE ADP

SHARING NEW HORIZONS



2025 PIONEERS

Let's create
a new airport model
together



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Augustin de Romanet.

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SHARED DYNAMICS

Innovate, support and empower.



These challenges invite us to maintain the spirit of aviation pioneers: to innovate and to dare, to face what is as much an industrial challenge as a shared human adventure.



In transforming the mobility of our society, air transport has experienced exceptional growth, going from 100 million annual passengers in 1960 to 4.5 billion passengers in 2019. Today this industry is grappling with two shocks.

The first has been the Covid-19 pandemic. The return to the level of 2019 traffic will be gradual, but I'm confident in the sector's ability to recover, as it has shown in previous crises. However, **adapting to a new long-term growth rate is a major challenge** and all players will have to adjust their models.

The second shock is climate change. Increasing the rate at which we reduce air travel's environmental impact is our principal challenge: all players in the aviation industry have been mobilised with an ambitious roadmap. **Certainly, commercial aviation has its place in a low-carbon world.**

Out of the crises, the aviation industry has created opportunities that require us to reinvent more than adapt. With Groupe ADP's 2022-2025 strategic roadmap, 2025 Pioneers, we are building an airport model focused on performance and sustainability.

Groupe ADP is capable of supporting these structural changes while creating value for its customers, neighbouring areas and our airport community.

Our model stands out for its expertise, its network, and its desire to put passenger

experience at the heart of its mission. This desire is enshrined in our purpose, which remains relevant for 2050, and which expresses three strong beliefs:

1. We are a hospitality group in the service of travellers.

We're inventing the airport of tomorrow with a seamless journey, innovative services and a unique travel experience.

2. We are a visionary group, reinventing the infrastructures of the future.

The vocation of airports is to become intermodal transport hubs; they will be modular, made of sustainable materials and will complement existing infrastructures.

3. We are a multi-local group, connected to, and in service of, neighbouring areas and their needs, whether in terms of energy, logistics or real-estate.

These challenges invite us to maintain the spirit of aviation pioneers: to innovate and to dare, to face what is as much an industrial challenge as a shared human adventure.

With 2025 Pioneers, we are building a sustainable future to aim for, whose priority projects are establishing the airport of tomorrow.

Augustin de Romanet

Chairman & Chief Executive Officer of Groupe ADP



Opportunities to share



A unique opportunity

However, Groupe ADP is convinced that air transport, capable of reinventing itself to reduce its carbon footprint, will continue to be an indispensable mode of transport, contributing to the progress and development of our societies.

Today's challenge is to reinvent a new model of sustainable and responsible growth for our group and our sector.

The considered development of our infrastructure will accompany the growth of traffic. We will offer a revitalised, value-creating service, adapted to the environmental context and the needs of travellers around the world.

A new momentum for our group

To support this transformation, our purpose remains our guiding light.

“To welcome passengers, operate and imagine airports, in a responsible way around the world.”

It embodies three strong beliefs that will lead to a new momentum for Groupe ADP.

To be a hospitality expert in the service of travellers.

The airport of the future must offer a seamless digital journey, high value-added services and offers, and a personalised experience.

To be an innovative group serving the infrastructures of tomorrow.

The airport of the future must be an efficient one thanks to sustainable construction and operating methods.

To be a multi-local group in service of local communities.

The airport of the future must be a transportation and energy hub that is integrated into overall regional planning.

A historic shift

For more than 40 years, the emergence of mass tourism, technological developments, the deregulation and consolidation of the global aviation sector, and the advent of major global hubs have all enabled the industry to enjoy a long period of growth. This growth has been exceptional, both in its rapidity and in its regularity. The COVID-19 and climate crises are now challenging Groupe ADP and the entire sector to adapt to a new context, with the sudden halt to traffic and its lasting effects on the one hand, and the necessary acceleration of the environmental transition of the aviation sector on the other.

A new strategic vision...

Profound transformation

A pioneering spirit has always been the source of our leadership – yesterday, today and tomorrow. The company’s strengths have remained intact during the crisis. Thanks to this resilience, this culture of innovation and open-mindedness, and through our strategic roadmap 2025 Pioneers, we are establishing the global and structural transformation of our activities and businesses, our client relations, our integration with the local communities, and our environmental transformation.

Hospitality always at the heart...

In this new model, the travelling customer is at the heart of our concerns, but with renewed and innovative resources. The fluidity and speed of their journey is guaranteed, in particular by cutting-edge digital tools. Above all, hospitality in the departure area aims for excellence, through its design, its service and its offer. Passengers are not simply considered users of our terminals, but customers of the entire airport ecosystem.

...of a multimodal transport hub

The airport is no longer just where you take a flight but a hub, where the travelling customers, benefiting from easier access from their departure point, can choose the optimal mode of transport, particularly in terms of the environment. In this way, the

plane becomes part of a journey which is also increasingly shared by train or other modes of transport.

Beyond traditional connections, multimodal connections represent an increasing share of the growth of Groupe ADP’s airports, notably those in the Paris region, building on an interchange module positioned at the heart of our infrastructures.

...sustainably designed and operated...

Groupe ADP has set the objective of achieving carbon neutrality by 2050 in our geographical scope extended to the cruising of all departing aircraft. To achieve this, we favour sobriety and performance of our infrastructures, and limit the new areas built in our existing surfaces. The biodiversity and carbon impact of new

infrastructure projects is progressively offset. Our choices must facilitate the reduction of the environmental footprint for both the airlines and their subcontractors as well as the airport management, and ensure the optimum flexibility of the buildings in the future.

... serving the city and the local communities...

The airport’s relationship with the city is changing. The concept of an ‘airport city’ is being replaced by the objective of connecting the airport to the neighbouring communities. The place of the car, the daily transport offer and the real estate policy adapt to better integrate the airport into comprehensive urban planning. The role of the airport in the neighbourhood is not limited to the role of job provider, but extends to the provision of a real estate offer or useful infrastructure for the communities, in terms of connectivity and mobility, structuring of low-carbon energy supply chains and preservation of biodiversity reservoirs.

... by a multi-local group to face global challenges...

Wherever Groupe ADP is in the world, we share the common ambition of our strategic project, starting with hospitality and sustainability.

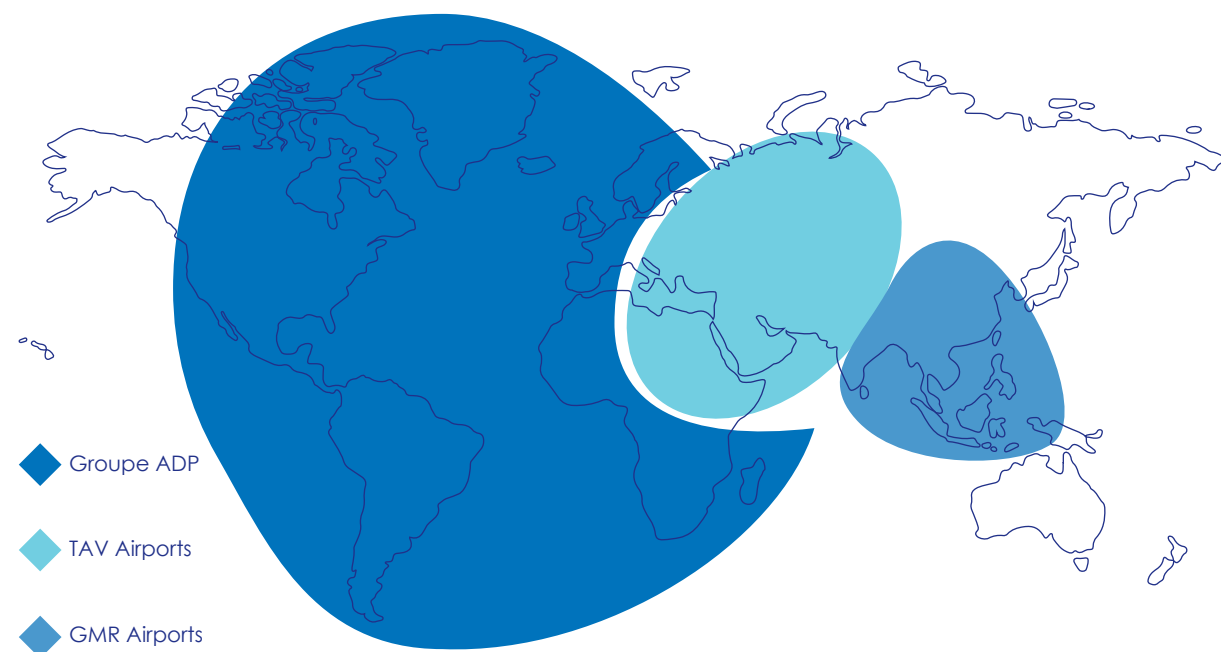
Implementation is always conceived to consider local issues, challenges, projects and specific constraints. Respect for local identities, cultures and particularities is always the basis of the group’s development. This means we are not building an international group, but a multi-local one. This flexible framework for sharing ambitions and proposals supports Groupe ADP’s unique industrial model, and involves our TAV Airports subsidiary and our joint venture GMR Airports Limited.

... by relying on each of its employees.

Groupe ADP is convinced that the fulfilment and exemplary behaviour of each individual serve a diverse workforce and company performance. This is why the group has developed a culture of responsibility and individual recognition in order to fully engage all employees. By relying on manager involvement, we also accelerate our innovation, agility and mobility projects, promote knowledge sharing and encourage the development of all employees.

...for the
long term

A group with a unique and value-creating model



Three complementary partners for a worldwide presence

With 70 years of experience, the Groupe ADP is a world leader in the airport industry. We are currently active, all activities and subsidiaries combined, at some 125 airports worldwide, in 50 countries. Groupe ADP relies both on a unique network of 29 airports, operated under management contracts or concessions, and on a pool of skills and expertise serving international markets.

To develop its expertise and presence around the world, the group relies on a uniquely complementary relationship with its two partners, TAV Airports and GMR Airports.

TAV Airports. TAV Airports is a Turkish airport group with 14 airports (5 in Turkey), and 7 airport services and hospitality companies.

GMR Airports. The Indian operator has recently joined the Groupe ADP network with 8 airports and has strong development potential, particularly in India.

An integrated model unique in the world

Groupe ADP's international offer is based on three main business streams: investment, airport operations, and services in the field of design engineering and innovative solutions. Groupe ADP is one of the few players in the sector to cover the entire value chain. Its global expertise and its targeted approach by market, by country and by client, enable it to respond to each of its stakeholders' needs.



A Global Industrial Project

‘2025 Pioneers’ is the strategic roadmap which kickstarts the transition of Groupe ADP towards a new airport model.

Built on three strategic priorities, it maps out developments for the long term, beyond the period covered by the roadmap, and is perfectly aligned with our Carbon Neutral 2030 and ZEN 2050 commitments.

For the first time, this roadmap details a group-wide multi-local industrial project, with 20 concrete and measurable objectives.



2025 PIONEERS

ONE AMBITION

Imagine the sustainable airport of tomorrow by:

- ◆ Aiming for excellence and sustainability in construction and operations.
- ◆ Innovating in hospitality.
- ◆ Developing the multimodal connections offer.

01



2025 PIONEERS

02



ONE GROUP

Build an integrated and responsible global group by:

- ◆ Consolidating the group network.
- ◆ Mobilising collective expertise to leverage it.
- ◆ Relying on strong regional roots.

03



SHARED DYNAMICS

Innovate, support and empower by:

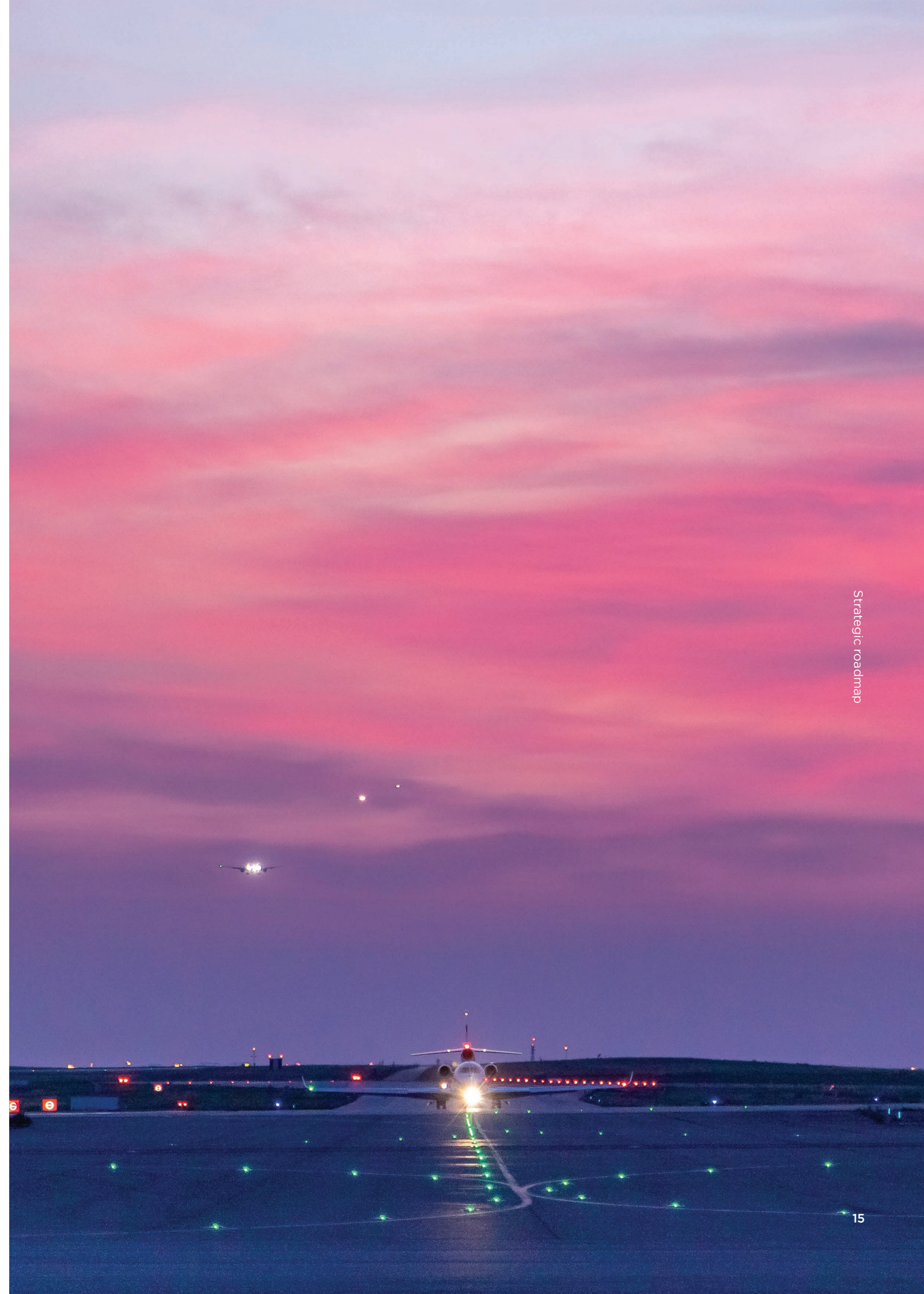
- ◆ Promoting an innovative approach.
- ◆ Attracting and retaining talents through a comprehensive HR policy.
- ◆ Developing a culture of responsibility.

Strategic roadmap



ONE AMBITION

**Imagine the sustainable airport
of tomorrow**





ONE AMBITION

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Aim for excellence and sustainability in construction and operations

Continuing our quest for operational excellence, by perfecting our operating methods to serve our airline customers and the entire airport community.

Promoting sustainable, refined and high-quality infrastructure, by revising our construction methods.

2025 OBJECTIVES

◆ Make more than 80% of flights depart on time

or within 15 minutes of the scheduled time.

Scope: airports controlled within Groupe ADP.

(Parisian airports (CDG/Orly) and Amman (AMM), Airports managed by TAV: Ankara (ESB), Izmir (ADB), Bodrum (BJV), Gazipaşa (GZP), Monastir (MIR), Enfidha (NBE), Skopje (SKP), Ohrid (ODH), Tbilisi (TBS), Batumi (BUS), Almaty (ALA)).

◆ Reduce average taxiing emissions per flight by 10%

Scope: Paris-Orly and Paris-CDG.

◆ Set a carbon budget

For the lifecycle of all investment projects over 5M€.

Scope: ADP SA, TAV.



ONE AMBITION

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Innovate in hospitality

Guaranteeing traveller time management, and offering them excellent hospitality throughout their journey, through digitalisation and our effective operating model.

Providing an excellent experience in the airside areas – from shopping zones to departure lounges – by creating the world's number one hospitality and retail franchise.

2025 OBJECTIVES

◆ Provide 50% of passengers with biometric facilitation

in their departure journey.
Scope: Paris-Orly and Paris CDG.

◆ Aim for excellence in hospitality

Put Paris-CDG in the Skytrax rankings Top 10 World's Best Airports,
4 airports in the Top 50 and 8 airports in the Top 100.
Scope: all Groupe ADP airports.

Reach an ACI/ASQ score of 4 in passenger satisfaction.
Scope: airports controlled within Groupe ADP with more than 3 million
passengers.

◆ Roll out the Extime retail and hospitality concept

in Paris and begin the roll-out of the franchise in 2 terminals outside
Paris Aéroport.



ONE AMBITION

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Develop the multimodal connections offer

Offering the travel solution with the lowest environmental impact for each destination, by developing new transport and connection offers.

Reconsidering the relationship between the airport and the city, through connectivity and the development of activities that generate cross benefits.

2025 OBJECTIVES

◆ Set the Parisian platforms at the best European level

in terms of train-air connection by increasing by 50% the number of train-aircraft connecting passengers at Paris-CDG and by doubling it at Paris-Orly.

◆ Use 10% of low carbon energy

in terminals and airside, almost doubling compared to 2019, and 40% excluding landing and takeoff.

Scope: airports controlled within Groupe ADP with an at ACA ≥ 3 in 2021 (CDG, ORY, Ankara, Izmir, Amman).

◆ Open the new multimodal hub at Paris-Orly

with the opening of the line 14 station in 2024, and make it possible to open or build 8 additional public transport lines to connect the Parisian airports to the neighbouring territories.

◆ Preserve 25% of land for biodiversity at Paris-CDG and 30% at Paris-Orly and Paris-LBG

and set a course for the group's airports to improve their biodiversity index by 2030.

Scope: the 23 airports of the group committed to the Airports for Trust charter.



ONE GROUP

**Build an integrated
and responsible global group**





01

ONE GROUP

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Consolidate the group network

Consolidating the group's airport network and sustainably ensuring the solidity of its different assets.

Ensuring selective and opportunistic development in the airport, hospitality and digital sectors, relying in particular on TAV Airports and GMR Airports.

2025 OBJECTIVES

◆ Stabilise the average maturity of our cocesssions portfolio at 30 years

Scope: all the group airports with concession contracts, excluding Paris.





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ONE GROUP

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Mobilise collective expertise to leverage it

Bringing together the group's expertise, by strengthening our business streams.

Building a global digital eco-system focused on data and based on the group's solutions.

2025 OBJECTIVES

◆ Open 100 additional international routes

to increase the connectivity of our territories.
Scope: all airports of the group.

◆ Develop the smartisation of the group's airports

with 3 airports at «Fully Digital» level
and 100% of the others at «Digital Friendly» level.

«Digital Beginner»:

the airport starts to install digital systems like boarding card readers, WiFi hotspots, etc.

«Digital Friendly»:

most passenger journey points are improved through digital systems.

«Full Digital»:

all points along the passenger journey are monitored in real time, supported by automated and digital processes.

«Digital Pioneer»:

Facial recognition is an integral part of a seamless passenger journey, enhanced by digital checks and a personalised experience.

Scope: airports controlled within Groupe ADP with more than 4 million passengers.



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ONE GROUP

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Rely on strong regional roots

Developing a multi-local group by valuing geographical and cultural diversity.

Serving the neighbouring territories, by contributing to the development of local communities.

2025 OBJECTIVES

◆ Support the generalisation of continuous descent procedures

between 2023 and 2025 at Paris-CDG and Paris-Orly.

◆ Promote the realisation of 80% of local purchases

in the Paris region including 20% from SMEs, in compliance with public procurement legislation.

Scope: ADP SA.



SHARED DYNAMICS

**Innovate, support
and empower**





01

02

SHARED DYNAMICS

03

Promote an innovative approach

Accelerating innovation by leveraging our collective intelligence.

Remaining agile, by simplifying our processes and working in project mode.

2025 OBJECTIVES



Roll out 120 experiments

in societal, environmental and operational innovations before 2025,
30 of which leading to industrialisation.

Scope: ADP SA, TAV, HubOne.





01

02

SHARED DYNAMICS

03

Attract and retain talents through a comprehensive HR policy

Implementing attractive remuneration linked to the company's economic and social performance.

Enhancing career paths through mobility and training to enable each employee to develop.

2025 OBJECTIVES

◆ Carry out at least one employee shareholding operation by 2025

Scope: ADP SA.

◆ Include an ESG element in the remuneration of 100% of employees

Scope: ADP SA, TAV, AIG.



01

02

SHARED DYNAMICS

03

Develop a culture of responsibility

Promoting employee engagement through local management.

Promoting simplicity of means, exemplarity and ethics.

2025 OBJECTIVES

◆ Multiply by 5 the number of employee civic engagement days

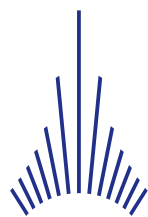
to reach 5,000 over 2022-2025.

Scope: ADP SA.

◆ Train 100% of employees in ethical and compliance best practices

Scope: ADP SA, TAV, AIG





GROUPE ADP

SHARING NEW HORIZONS