Power Up

Defining the passenger position for eRAM

Floor Schuur (Deloitte)

EFC & Power Up & NLR event

29 October 2025

Power Up focuses on commercial flights with electric aircraft: eRegional Air Mobilty

- Focus on *introducing commercial electric passenger flights* improving *regional connectivity*
- *Initiative lead by airports* that already have a passenger operation, partnering with selected OEMs, Operators and other partners

- Focuses on *developing the ecosystem* of battery/hybrid-electric aviation;
- Has several initiatives to kick-start eAviation development through eGA
- Association open to all organisations

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ELECTRIC FLYING CONNECTION

Cooperation/ alignment on:

- External events including demonstrators
- Communication/lobby
- Knowledge sharing
- Supporting each other's initiatives

Other initiatives relevant for battery-electric aviation development in the Netherlands

Focus Group General Aviation

DEAC
Dutch Electric Aviation Centre Teuge

NAG Advancing your Aerospace and Airport Business

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The relevancy of electric aviation is twofold: improving inter-regional connectivity and serving as an incubator for step-change decarbonization of regional aviation

'Sustainable' aviation

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Decarbonizing current aviation

- Designing and producing more fuel-efficient aircraft and engines
- Stimulating the production and uptake of SAF
- Increasing carbon pricing/taxation
- Stimulation/enforcing electrification ground operations

- Costly for the sector; makes flying more expensive
- Risk of deteriorating connectivity, especially for regions
- Slow progress in decarbonization, noise and fine particles
- No solution for NOx

…… but needs to be done in any case

Leveraging new zero-/low emission aircraft technology

- Improve regional connectivity through cost-efficient small-scale electric aircraft (up to 30-seaters initially)
- Provide a platform for increasingly larger scale electric aircraft that can ultimately substitute current flights with a step-change in emissions and add new feeder & dense P2P routes

- Reduces cost; will make flying more affordable
- High potential of much improved regional connectivity
- Substantial benefits in noise and air pollution
- Can reduce external cost by substituting from road to air

……which requires strong coordination as it is a new type of aviation

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Power Up is at the forefront of pushing the thinking on how to introduce and maximize the societal potential of eRAM; a new passenger proposition is a key element

Local context in the Netherlands

- The Netherlands has *strong tradition in leveraging air accessibility as a tool for (socio-)economic development*
- *Tight noise constraints* at the three largest airport operating at full (annual) noise capacity requires *pushing the boundaries in thinking on slots/airport environmental capacity*

- *Small-scale commercial aviation currently non-existent* in the Netherlands; airports need to think how to serve this new type of aviation

Power Up's objective and key actions

- Maximally support (the growth of) eRAM through:
  - Developing a new, harmonized *passenger proposition* that best leverages the opportunities that small-scale aircraft operations offer
  - Defining and implementing harmonized *operational readiness* dimensions such as available power, chargers and charging approach
  - *Securing a policy & regulatory context* that allows capturing the full benefit of eRAM
  - *Organizing demonstrator flights* to test readiness & noise impact and show case progress

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Airports are a critical factor in making eRAM a success given their weight in travel time, passenger experience and in total trip cost

Current airport processes and cost are a major downside for very short-haul flying…

- "Long queues and early arrival times"

- "More waiting than flying"

- "Could this be simpler?"

…but eRAM technology can take-away many of these factors making short-distance flying much more attractive

- Small-scale of aircraft makes it possible to adopt a difference passenger proposition:

  - No mandatory security screening with aircraft under 15-ton MTOW)

  - Low number of passengers require much shorter boarding procedures;

  - Traveller profile: highly experienced; no checked luggage

- eRAM can be served very cost-effectively by airports (not considering security-related cost) and expected to benefit from aviation tax exemption

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"The most important thing is to forecast where customers are moving and be in front of them"

Philp Kotler

eRAM target customers

- Interregional (200 – 500km) business travelers that want to travel efficiently and sustainably
- First to adopt the proposition are those who see mayor time savings on their current business trips, because of their inefficient travel time, due to lack of efficient options or company travel policy
- This target group expects comfort and convenience in their way of travelling

The **problem we are solving**: *time-inefficient travelling* for *business travelers*

This means our PU proposition requires a huge promise on <u>time efficiency</u>, taking into account what <u>comfort and convenience</u> our target group expects

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Target **PRIMARY** PROMISE: **SPEED**

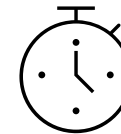# Experience the future of flight:

from car to plane in 20 minutes
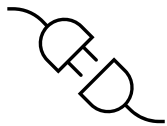
SEAMLESS TRANSITION
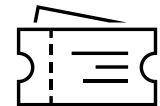Park or arrive as close as possible to the terminal

PACK LIGHT, FLY FAST
Only hand luggage allowed, eliminating the need for check-in desks

SWIFT (or NO) SECURITY
Predictable and possibly dedicated security processes or no/much lighter security

EXCLUSIVE ACCESS
Dedicated eRAM area or gate for streamlined boarding

(Potential!) VALUE-ADDED PROMISE: QUALITY

SEPARATE SPACES

Secure areas designed for uninterrupted experience

CUSTOMER SUPPORT

Accessible and responsive 1-1 support to assist passengers

ENHANCED COMFORT

Comfortable seating and relaxing environments

WORKSPACES

Areas equipped with desks for convenience

PREMIUM AMENITIES

High-quality offerings such as coffee, food, refreshments

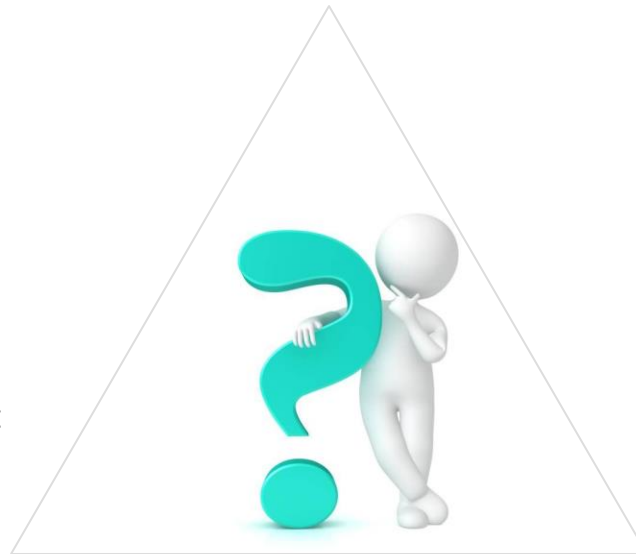# There are still many questions to be addressed before a decision on the passenger proposition can be made

Passengers

- How will passengers react to no or simplified security?

- What facilities do they expect on the ground?

Operators

- How to secure an as much as possible consistent airport product across the network?

Passengers

Airports

- Is having a separate passenger journey for eRAM manageable within the current terminal complex? Can the GA terminal be used?

- Can airports count on consistency in policy with regard to no security check for < 15-ton MTOW?

Operators

Airports

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We are soon to start a unique research into future eRAM users' needs and expectations

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WHY - Why this research?

This research helps answer these key questions, but also provides **strategic value** to participating partners:

✔ It delivers **data-driven insight** into safety perception, comfort needs, and decision criteria of your future customers

✔ It enables a **well-informed go-to-market strategy** for the passenger proposition of e-flights

✔ It provides input for **policy shaping and stakeholder engagement**, including airports and regulators

By joining forces now, we ensure the passenger proposition is not only sustainable and efficient — but also **credible, acceptable, and competitive**.

WHO - Who is involved?

Target audiences:
1. *Passengers*
   (business travelers)
2. *Corporate travel managers*

Research partners:
- Unified International
- Stichting Duurzaam Vliegen
- MarktEffect
- NATM

Community collaboration:
Partners from Power Up are invited to contribute their perspective and benefit from shared insights.

WHAT - What will we explore?

Attitude and Awareness of Electric Flying

Evaluation of the Power Up Proposition

Screener & Profile Variables

Security & Safety Perception

Adoption Potential and Modal split Behaviour

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Key take-aways

1. While eRAM aircraft and chargers are prerequisites, airports play a vital role in the success of eRAM given their impact on travel time, passenger experience and cost

2. eRAM's small scale of operations allow for a much more attractive passenger experience while also potentially reducing costs

3. We will need to do more homework starting with understanding passengers' and corporations' expectations

4. We have the potential to shape the industry standard for future eRAM travel

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