



POLICY HANDBOOK

GROUND HANDLING 2.0

A STRATEGIC BLUEPRINT FOR SAFETY, FAIR EMPLOYMENT,
SUSTAINABILITY, AND ECONOMIC RESILIENCE

ASA
WORLD

INTRODUCTION

Ground Handling Organizations (GHOs) power global aviation, ensuring every year that over 5 billion passengers, 36 million flights, 124 million tons of air cargo, and over 6 billion checked bags¹ move safely and efficiently worldwide through providing aviation services spanning passenger check-in, baggage handling, aircraft turnarounds, and cargo operations.

The sector's economic impact is substantial: directly employing over 1.1 million workers, supporting nearly 3 million jobs through supply chains, and generating approximately USD 38 billion in direct gross value added while contributing nearly USD 100 billion in total economic value².

Four Critical Challenges

Despite its central role in aviation and the global economy, the ground and cargo handling sector confronts four interconnected crises threatening its vital function:



Fragmented safety oversight

Absence of harmonized regulations and inconsistent safety oversight regimes



Workforce crisis

Persistent instability, attrition, wage pressures, and critical skills shortages



Decarbonization barriers

High capital costs for environmental transition with limited viable recovery pathways



Destructive market dynamics

Unsustainable airline contracting practices driving ruinous competition

Aviation Services Association - ASA World's approach recognizes these challenges as fundamentally interconnected, demanding coordinated action and regulatory intervention.

This Policy Handbook presents ASA World's strategic vision for transforming ground and cargo handling into a sector characterized by harmonized global standards, robust safety oversight, sustainable workforce welfare, environmental stewardship and economic resilience.

We are committed to working collaboratively with regulators and stakeholders - including ICAO, EASA, competent authorities worldwide, ACI, IATA, ITF, and national ground handling associations - to implement essential reforms and build a safer, stronger and more resilient ground handling sector within the aviation ecosystem.

¹ ATAG, 2024. Air Transport Action Group: facts and figures.

² ASA World, 2024. A study on the state of the aviation services industry. Prepared by Steer.

ASA WORLD

Championing Ground and Cargo Handling Reform

Founded over five decades ago, the Aviation Services Association (ASA World) has transformed itself from a regional European association into the definitive global voice for aviation ground and cargo services. As the only ground handling observer organization recognized by ICAO, we bear both the privilege of industry leadership and the responsibility of faithfully driving sectoral improvement worldwide.

ASA World provides a collaborative platform where GHOs drive sector transformation, share expertise, and establish the safety and quality standards that underpin efficient aviation operations worldwide.

Our mission is straightforward - we advocate for a safe, sustainable and economically resilient ground handling sector while supporting the welfare of the millions of dedicated workers who deliver global aviation services.

Through strategic advocacy, we strengthen the sector's reputation within the broader aviation community and influence key stakeholders on issues critical to reform and sustainable development.

ASA World Policy Pillars

Centered around interrelated crises that confront the ground handling sector



I. Harmonized Regulations and Safety Oversight

Supporting globally consistent standards and regulatory frameworks to eliminate safety gaps and operational inconsistencies across jurisdictions



II. Workforce Development and Fair Employment

Fostering a skilled, motivated workforce through improved working conditions, competency-based training, and collaborative social sustainability initiatives



III. Environmental Sustainability and decarbonization

Creating enabling policies to support sustainable ground support equipment and infrastructure investments



IV. Economic Resilience and Fair Market Practices

Promoting sustainable commercial practices and balanced contractual frameworks that enable long-term investment in safety, technology, and workforce development

A concerted, coordinated effort across all stakeholders is essential to ensure the ground handling industry can fulfill its critical role in supporting safe, sustainable and efficient aviation operations worldwide. The interconnected nature of these pillars reflects the reality that economic resilience enables safety investments, regulatory harmonization underpins safety and supports workforce development, and environmental sustainability requires both economic stability and skilled personnel to implement successfully.

POLICY PILLAR I

Harmonized Regulations and Safety Oversight

ASA World champions harmonized regulations and strong safety oversight for the ground handling sector.

The Challenge

Ground handling is the only substantial aviation subsector that lacks harmonized global standards and regulations, relying instead on industry-developed manuals and fragmented safety oversight regimes marked by numerous airline variations. This absence of comprehensive, globally harmonized regulation is a relic from when aircraft operators primarily self-handled their ground services. The ground and cargo handling sector has evolved into a highly complex system largely delivered by independent providers, yet regulation remains rooted in outdated practices that fail to reflect today's operational realities and safety risks.

This fragmentation creates:

-  **Inconsistent safety oversight** and accountability frameworks
-  **Uneven operational standards** across airline handling procedures
-  **Inefficient audit processes** with significant duplication and resource waste
-  **Variable training standards** and competency requirements across jurisdictions

The development of dedicated ground handling Standards and Recommended Practices (SARPs) by ICAO marks a historic milestone, introducing amendments to Annexes 6, 9, and 14 as well as PANS-Aerodromes to strengthen safety, establish global consistency in oversight, and enhance operational resilience across Member States. At the regional level, the European Union Aviation Safety Agency (EASA) has advanced this agenda through Regulation (EU) 2025/20, which mandates systematic oversight of ground handling organizations, including auditing and safety management systems, providing the first comprehensive regional regulatory framework and illustrating the benefits of proactive regulatory action in support of global safety objectives. Both initiatives emphasize aviation system's vulnerability in the absence of a strong and resilient ground handling sector and serve to elevate standards, clarify responsibilities, improve coordination and reduce fragmentation.

The Impact

The sector must overcome persistent challenges even after interventions by ICAO and EASA, especially due to:

Industry Standards - aircraft operators impose their own airline-specific variations, increasing airside operational complexity and creating inconsistent safety protocols across the same airport



Audit Inefficiency - GHO stations face an average of 6.25 audits per year, requiring approximately 50 non-productive staff hours per station, with large GHOs experiencing up to 178 audit days annually with substantial duplication

Commercial Advantage – GHOs have voiced concerns that some airlines leverage safety audits to extract commercial concessions from ground handlers

Cargo Safety Risks – GHOs face substantial challenges with Undeclared Dangerous Goods (UDG) and supply chain oversight

Policy Goals

While applauding ICAO's decision to include ground handling amendments within existing SARPs and committing to contribute toward their formulation, our policy goals are to:

-  **Include ground handling amendments into Annex 19 - Safety Management**
-  **Creating a separate ICAO Annex for ground handling to ensure the sector is regulated on a standalone basis on par with aircraft operators, aerodromes, and air navigation service providers**

POLICY PILLAR II

Workforce Development

ASA World is committed to advancing the welfare of more than 1.1 million ground and cargo handling workers worldwide and positioning the sector as an attractive profession and career choice.

The Challenge

The ground handling sector faces an unprecedented talent exodus, losing thousands of qualified professionals annually, including 32-40 thousand in Europe alone during the COVID-19 pandemic. Many factors have conspired to reduce ground handling's attractiveness as a career, including:



Wages

GHOs are increasingly unable to maintain fair wages and work benefits for their staff due to imbalanced airline commercial practices



Limited Career Pathways

Insufficient investment in training and professional development



Work Conditions

Physically demanding roles often in adverse work conditions and with limited technological support



Skills Recognition

Lack of standardized competency frameworks and mutual recognition

The Impact

The sector's inability to attract and retain staff has a profound impact on the entire aviation industry, not only in terms of operational resilience and service standards but also in the critical area of safety.

Policy Goals

ASA World advocates for enhancing the welfare of all GHO workforce and reinventing the sector as an attractive, sustainable career choice. We further advocate for:

- ✔ Regulatory and airport interventions are needed to safeguard against airline commercial practices that undermine fair wages, benefits, and working conditions, while also ensuring robust occupational health and safety frameworks
- ✔ Investing in comprehensive training programs and standardized skills recognition to expand career pathways
- ✔ Supporting positive, learning-oriented safety cultures to improve retention and job satisfaction
- ✔ Promoting technology adoption that enhances both working conditions and operational efficiency

POLICY PILLAR III

Environmental Sustainability

ASA World fully embraces net-zero emission aspirations while advocating for fair cost-recovery mechanisms for sustainable investments.

The Challenge

ASA World fully supports ICAO's Long-Term Global Aspirational Goal (LTAG), including transforming all ground support equipment (GSE) to electric, biofuels or hydrogen by 2050. However, this transition faces significant barriers:

**Capital Intensity**

Substantial upfront investments are required for new equipment and infrastructure

**Technology Gaps**

Immature technology standards and non-standardized charging protocols

**Recovery Uncertainty**

Unclear pathways for recovering sustainability investments

**Lead Times**

Extended delivery schedules for electric and smart GSE

The Impact

Without sustainable funding pathways and regulatory support, the ground handling sector's environmental transition will fall short of meeting its net-zero aspirations.

Delayed electrification increases long-term carbon emissions and operational costs, while technology fragmentation prevents economies of scale needed for sector-wide transformation.

The inability to recover sustainability investments forces GHOs to choose between environmental responsibility and financial survival, ultimately slowing decarbonization across the entire aviation ecosystem.

Policy Goals

ASA World advocates for the sector's transition to environmental sustainability while safeguarding its economic resilience. We further advocate for:

- ✔ **Direct and indirect State subsidies and tax credits to enable faster transition to sustainable GSE**
- ✔ **Regulatory mechanisms for recovering investments in mandated or essential sustainable GSE and infrastructure**
- ✔ **Fair cost-recovery mechanisms that support the business case for sustainable investments**
- ✔ **Ground handling licensing durations that are aligned with equipment asset life cycles**
- ✔ **Airport-led development of standardized charging infrastructure and planning**
- ✔ **Leveraging digitalization and automation to drive both operational efficiency and emissions reduction**

POLICY PILLAR IV

Economic Resilience

ASA World advocates for the economic resilience of the ground handling sector, strengthening its ability to withstand shocks, adapt to disruption, sustain essential operations, and achieve long-term growth.

The Challenge

The ground handling sector remains financially vulnerable and has not yet fully recovered from the COVID-19 pandemic. The sector's profitability collapsed from an average annual profit of USD 700 million (2007-2014) to a loss of USD 1.1 billion in 2022, reflecting deep structural weaknesses that threaten its long-term viability.

The sector's financial decline stems from basic structural vulnerabilities:



Limited pricing power

Airline market dominance constrains GHOs' ability to recover costs and to provide fair wages and benefits



Destructive licensing competition

Excessive licensing without safeguards for safety, fair labor conditions and adequate compensation, drives unsustainable pricing pressures



Unbalanced contract terms

Airlines increasingly transfer operational and financial risks to GHOs



High fixed costs with volatile demand exposure

Capital-intensive operations are vulnerable to traffic fluctuations

The Impact

Financial instability actively threatens the sector's ability to invest in essential areas including safety infrastructure, workforce development, environmental sustainability, and operational resilience. Economic resilience empowers GHOs to deliver the quality and reliability that aviation demands, while financial instability jeopardizes the safety and reliability of the entire aviation industry.

Economic resilience requires fundamental reforms to create a fair contracting framework between airlines and GHOs, including:

Reasonable payment terms that support cash flow stability

Appropriate liability coverage and caps that fairly allocate risk

Clear force majeure clauses that protect against uncontrollable events

Price-escalation mechanisms aligned to relevant cost indices and market conditions

Contract durations that allow for adequate cost recovery and investment planning

Policy Goals

ASA World leads the change to fundamentally transform industry dynamics from destructive competition to value-based partnerships that prioritize safety, sustainability, and service quality. We further advocate for:

- ✓ **Regulatory interventions and airport operator safeguards against imbalanced airline commercial practices**
- ✓ **Aligning the number and duration of ground handling licenses with long-term investment cycles**
- ✓ **Standardizing ramp operational procedures and eliminating airline-specific variations to reduce audit duplication and to lower compliance costs**
- ✓ **Fostering investment-friendly regulatory and commercial environments**



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