



ADDENDUM NO. 1 – RFP-FY26-CCO-02
On-Airport Rental Car Concession Program
Norfolk International Airport
Issued: July 17, 2025

This Addendum is being issued post pre-bid meeting for the On-Airport Rental Car Concession Program at the Norfolk International Airport.

The following date change for submission will apply:

II. RFP SCHEDULE – KEY DATES - 2025

Pre-Bid Follow-Up Written Questions Due to NAA	Tue, July 22, 4pm ET
NAA Addendum Issuance	Mon, July 28
Clarification questions due to NAA	Wed, July 30, 12pm ET
*NAA Addendum Issuance	Mon, August 4
<i>*Authority will provide answers to submitted statement(s) that it determines need clarifying only.</i>	

All other dates and terms and conditions will remain the same.

Enclosures: July 16, 2025 Pre-Bid Meeting attendee roster and slide deck.

Remainder of Page Left Blank



On-Airport Rental Car Concession Program RFP Pre-Bid Meeting

Attendee Roster

July 16, 2025

Attendee (In Person)	Company / Position	E-Mail	Attendee (Virtual)	Company / Position
Steve Sterling	NAA EVP COS	ssterling@norfolkairport.com		
Steve Djunaedi	NAA VP CCO	sdjunaedi@norfolkairport.com		
Cathy Sutherland	NAA Landside Ops Sr Manager	csutherland@norfolkairport.com		
Andrea Davadilla	NAA Ground Transportation Coord	adavadilla@norfolkairport.com		
Dan Benzon	Benzon Aviation Consulting President	Dan.Benzon@benzongroup.com		
John DeCoster	Decomm Aviation Consulting President	jdecoster@decommaviation.com		
Matt Amos	Gresham-Smith Architect	matt.amos@greshamsmith.com		
		SPflueger@Hertz.com	Scott Pflueger	Hertz Director Properties & Concessions
April Fladeland	Hertz General Manager	afladeland@hertz.com		
Bert Sheppard	Sixt Director Airport Relations	Elbert.sheppard.jr@sixt.com		
Michael Schwartz	Avis-Budget Director NE Properties Group	Michael.Schwartz@avisbudget.com		



On-Airport Rental Car Concession Program RFP Pre-Bid Meeting

Attendee Roster

July 16, 2025

Attendee (In Person)	Company / Position	E-Mail	Attendee (Virtual)	Company / Position
Frank Maffei	Avis-Budget	Frank.Maffei@avisbudget.com		
Mark Waad	American RAC President	mark@americanrentacar.com		
Derek Albert	American RAC	derek@derekalbert.com		
Alisha Tillman	Enterprise Mobility Director, Airport Properties	Alisha.N.Tillman@em.com		
Mike Bruce	Enterprise Mobility VP/GM Virginia	Michael.Bruce1@em.com		
Dee Sanderson	Enterprise Mobility Group Rental Manager SE VA	Dee.Sanderson@em.com		



Welcome!

On-Airport Rental Car Concession Program RFP Pre-Bid Meeting

JULY 16, 2025

[ORF Video](#)





Welcome & Admin Items



Workshop Agenda

9:00 – 9:10 Check-In & Welcome (NAA Board Room)

9:10 – 9:30 Introduction

- ORF Transform Program

9:30 – 10:45 Request for Proposals & Sample Agreement

- RFP schedule
- RFP key items
- Sample Agreement key items
- RAC preliminary written questions and new questions

10:45 – 11:00 Break

11:00 – 11:40 Parking Garage A Walkthrough

11:40 – 12:00 Reconvene (NAA Board Room)

- Final post-tour questions (RACs will submit new questions requiring a written response in writing post-Pre-Bid Meeting)

TRANSFORM

THE FUTURE OF ORF

State of the Airport

Who Are We?

- The **Norfolk Airport Authority** is an independent political subdivision of the Commonwealth of Virginia
- Governed by a **nine-member board of commissioners** appointed by Norfolk City Council
- The Authority **independently owns and operates** Norfolk International Airport and the land it sits on
- We are a **“city” within “cities”** – we employ 225+ personnel functioning in the roles of administration, operations, parking, police, aircraft rescue and fire fighting, janitorial, building maintenance, and field maintenance

We Are a Business

- Just like any business:
 - We earn revenue
 - We incur costs
- Our operations are self-supporting
 - We receive **no** local taxes or subsidies
- Our major revenue sources (FY 2024):
 - Parking (38%)
 - Rent/Leases (23%)
 - Airline Landing Fees (15%)
 - Rental Car (14%)
 - Concession Commissions (9%)
 - Other (1%)

2024 Economic Impact of the Airport



ORF delivered **\$2.68 billion** to the economies of Virginia and Northeast North Carolina in 2024.

Transform ORF, now underway, is valued at nearly **\$1 billion**, all funded without local taxes.

\$1.2 billion

In Job
Earnings



\$1.673 billion

GDP



Nearly \$380 million
Capital Improvements
Completed from
2019-2024



Nearly 22,500

Jobs

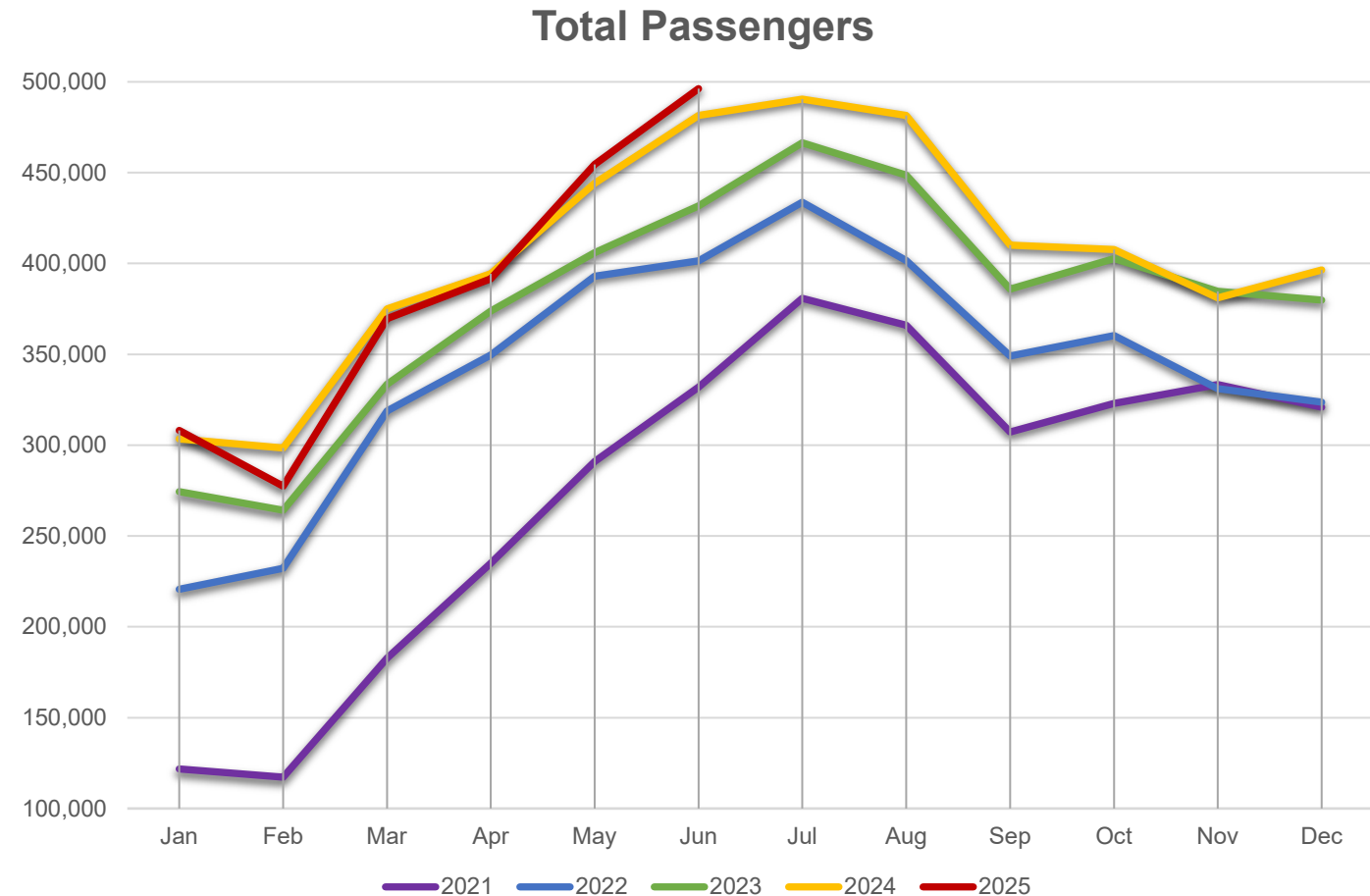




Commercial Aviation Market

Our Market Strength Continues to Grow

- 2024 was another record-breaking year!
- 2024 up 6.9% over 2023
- Over 4.86M passengers passed through the airport in 2024
- June 2025 was the busiest month in the history of the airport
- YTD CY2025 is up 0.1%



2025 Skytrax Awards



"Norfolk International Airport delivers a good regional airport customer experience which is underpinned by efficient movement and processing systems for departure and arrival. Passengers will find the most appealing seating areas in the central area of the landside departure building which in addition to an excellent choice, the space is nicely enhanced with local artworks and landscaping. There is a good commercial offer for an airport of this size, and this includes a variety of local, national, and international brands. Staff are generally friendly at all guest touchpoints."

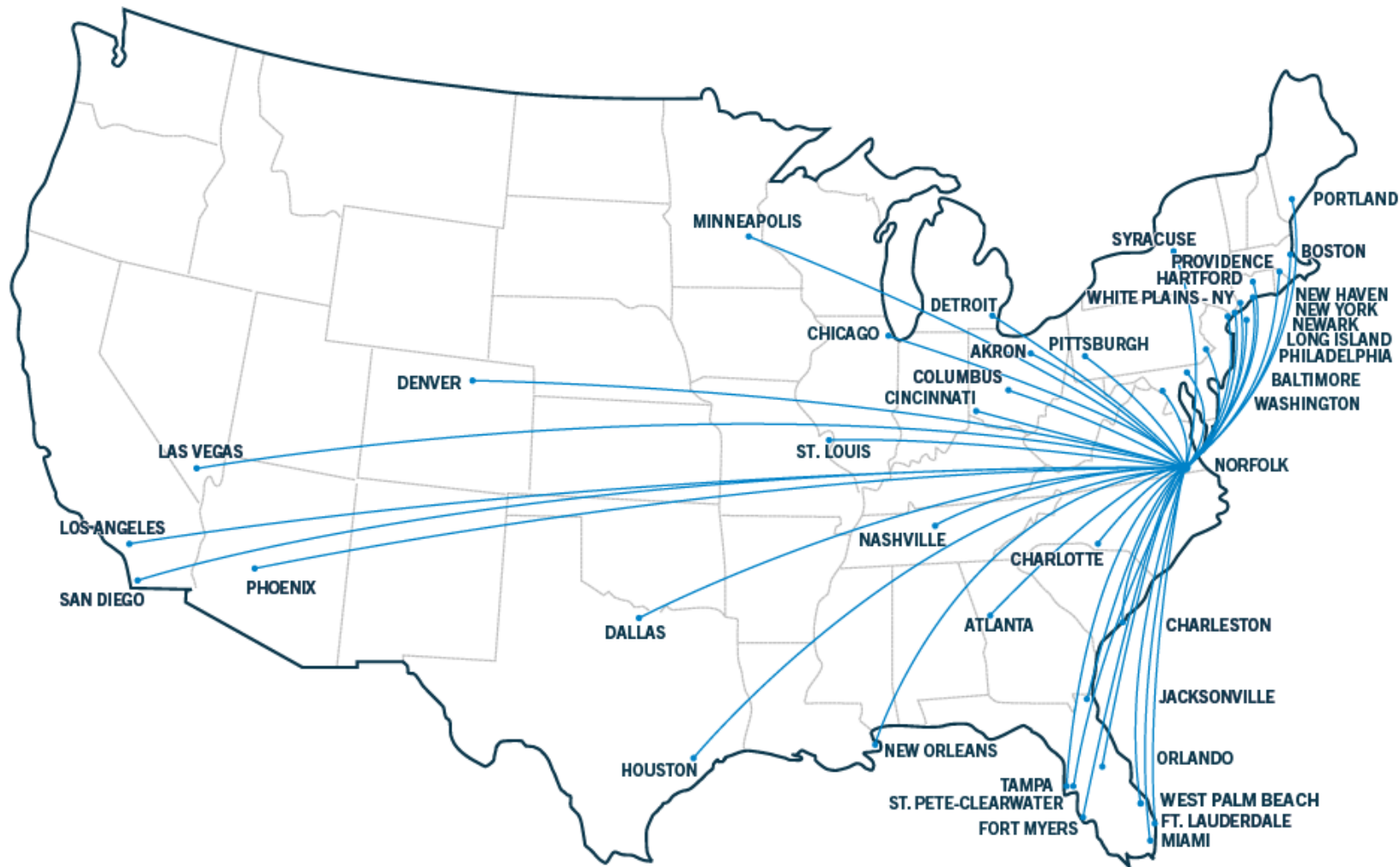
SKYTRAX
World Airport Awards

[Winners](#) [About](#) [Press](#) [Winner History](#)

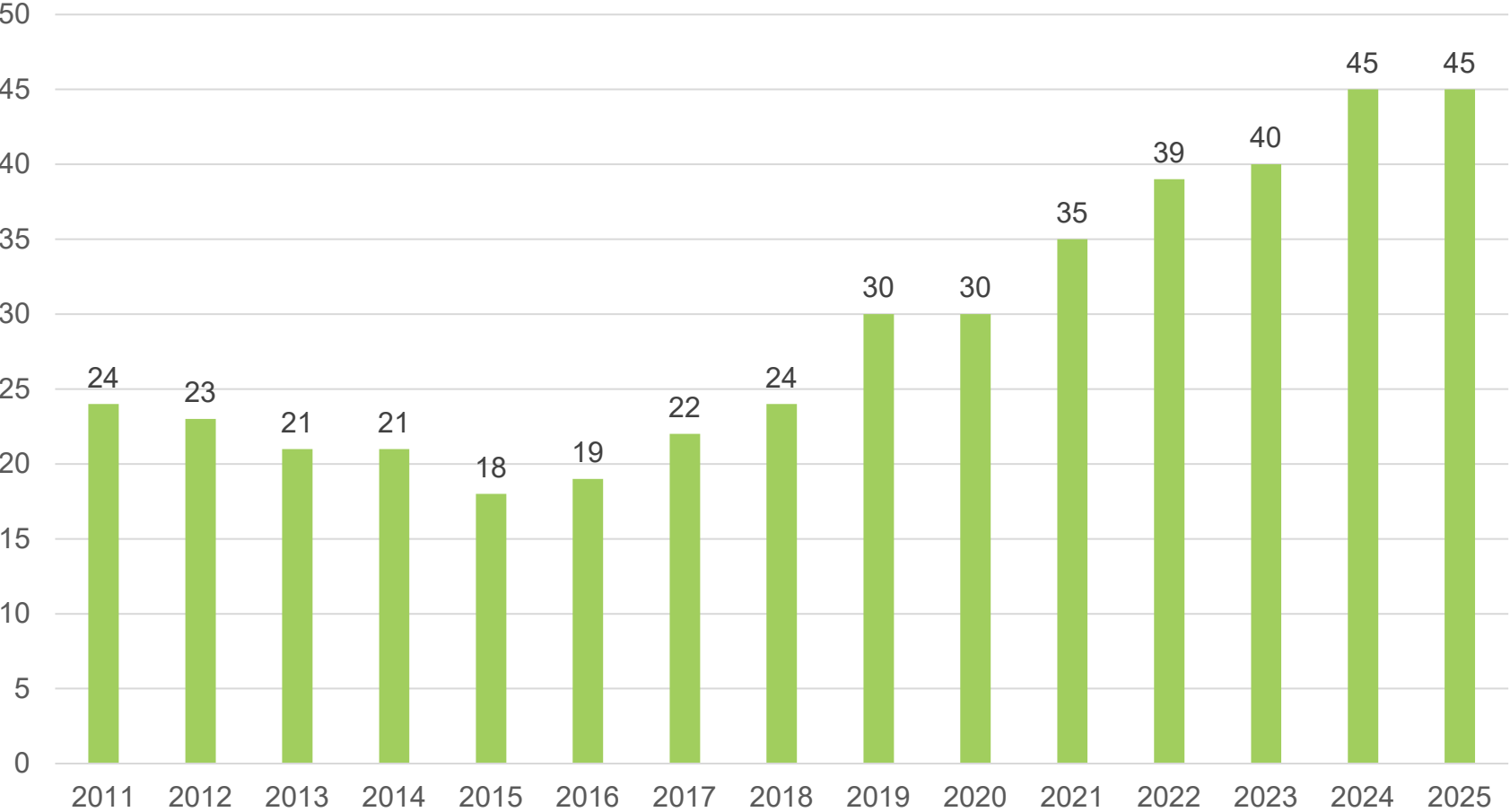
World's Best Domestic Airports 2025

1	Tokyo Haneda
2	Osaka Itami
3	Chengdu Tianfu
4	Norfolk International
5	Dallas Love Field
6	Kagoshima
7	Chicago Midway
8	Kobe
9	Busan
10	Kansas City

45 Nonstop Destinations Served to 41 Cities



Number of Nonstop Destinations



Source: Airline Data Inc. as of 4/1/2025

Origin Airport Code	Total Nonstop Markets	2024 Passengers
CVG	57	8,596,821
CHS	55	6,095,173
SMF	53	12,721,567
IND	52	10,091,726
SAT	49	10,578,904
JAX	49	7,385,004
CMH	48	8,523,317
BDL	47	6,535,322
OAK	47	9,131,697
SNA	45	10,503,527
ORF	45	4,864,752
ANC	44	4,671,750
PBI	42	8,170,224
CLE	41	9,538,349
SJC	41	10,916,049
MKE	35	6,043,654
MEM	35	4,755,063
OMA	35	5,064,254
BUR	35	6,225,282
ABQ	32	5,206,206
ONT	30	6,856,857
OGG	29	5,941,563
BOI	28	4,844,999
RNO	24	4,618,948

Our Air Service Needs – Domestic

2024 Top 50 Domestic Destinations													
Pax Rank	Destination Airport City	Airport Code	PDEW	Passengers	Avg Fared Fare	Fared Yield	Pax Rank	Destination Airport City	Airport Code	PDEW	Passengers	Avg Fared Fare	Fared Yield
1	Orlando, FL	MCO	335.6	245,675	\$ 104.37	\$ 21.18	26	Charlotte, NC	CLT	65.3	47,818	\$ 229.92	\$ 34.67
2	Atlanta, GA	ATL	229.9	168,319	\$ 244.66	\$ 28.05	27	St. Louis, MO	STL	54.8	40,090	\$ 217.52	\$ 20.97
3	Tampa, FL	TPA	180.4	132,071	\$ 114.87	\$ 16.90	28	Hartford, CT	BDL	54.7	40,011	\$ 107.74	\$ 34.20
4	Fort Lauderdale, FL	FLL	177.8	130,179	\$ 95.29	\$ 17.76	29	Austin, TX	AUS	54.5	39,905	\$ 270.42	\$ 13.88
5	Dallas/Ft. Worth, TX	DFW	175.7	128,648	\$ 256.78	\$ 14.58	30	Minneapolis/St. Paul, MN	MSP	52.0	38,072	\$ 277.79	\$ 20.84
6	San Diego, CA	SAN	163.5	119,649	\$ 297.12	\$ 9.90	31	San Francisco, CA	SFO	51.6	37,756	\$ 372.00	\$ 10.77
7	Chicago, IL	ORD	158.6	116,082	\$ 197.79	\$ 30.26	32	Baltimore, MD	BWI	49.3	36,066	\$ 164.48	\$ 8.28
8	New York, NY	LGA	157.7	115,420	\$ 146.98	\$ 30.14	33	San Juan, PR	SJU	47.1	34,451	\$ 236.81	\$ 9.37
9	Denver, CO	DEN	146.6	107,286	\$ 241.79	\$ 13.17	34	Honolulu, HI	HNL	46.1	33,772	\$ 607.64	\$ 7.79
10	New York, NY	JFK	137.4	100,541	\$ 134.18	\$ 18.80	35	Kansas City, MO	MCI	45.9	33,603	\$ 258.29	\$ 19.20
11	Las Vegas, NV	LAS	131.0	95,926	\$ 257.62	\$ 11.19	36	Salt Lake City, UT	SLC	45.7	33,452	\$ 361.53	\$ 10.64
12	Newark, NJ	EWR	127.1	93,071	\$ 142.99	\$ 15.12	37	Indianapolis, IN	IND	43.0	31,495	\$ 207.62	\$ 26.16
13	Los Angeles, CA	LAX	123.5	90,402	\$ 295.36	\$ 11.76	38	Philadelphia, PA	PHL	42.9	31,396	\$ 250.17	\$ 38.86
14	Jacksonville, FL	JAX	120.7	88,366	\$ 139.03	\$ 23.13	39	Charleston, SC	CHS	40.6	29,746	\$ 138.98	\$ 25.73
15	Houston, TX	IAH	117.9	86,329	\$ 222.84	\$ 13.93	40	Pensacola, FL	PNS	40.0	29,284	\$ 228.70	\$ 16.26
16	Boston, MA	BOS	108.5	79,412	\$ 190.27	\$ 30.54	41	Pittsburgh, PA	PIT	38.4	28,081	\$ 149.63	\$ 40.78
17	Nashville, TN	BNA	107.0	78,302	\$ 197.51	\$ 28.98	42	Cincinnati, OH	CVG	37.8	27,689	\$ 170.22	\$ 28.08
18	Miami, FL	MIA	92.9	68,010	\$ 226.27	\$ 15.73	43	Fort Myers, FL	RSW	36.3	26,573	\$ 169.95	\$ 13.07
19	New Orleans, LA	MSY	92.3	67,539	\$ 159.25	\$ 15.87	44	Columbus, OH	CMH	36.3	26,558	\$ 147.22	\$ 30.37
20	Seattle, WA	SEA	89.7	65,689	\$ 346.40	\$ 13.31	45	Houston, TX	HOU	35.3	25,857	\$ 196.35	\$ 5.52
21	Chicago, IL	MDW	83.3	61,009	\$ 162.84	\$ 8.34	46	Sanford, FL	SFB	34.8	25,487	\$ 35.71	\$ 0.45
22	Phoenix, AZ	PHX	82.6	60,481	\$ 320.41	\$ 10.71	47	Memphis, TN	MEM	34.3	25,110	\$ 229.89	\$ 18.68
23	Providence, RI	PVD	81.0	59,293	\$ 113.91	\$ 31.89	48	Portland, OR	PDX	33.2	24,304	\$ 353.64	\$ 9.15
24	Detroit, MI	DTW	77.8	56,956	\$ 266.37	\$ 33.54	49	Sacramento, CA	SMF	32.6	23,887	\$ 345.70	\$ 8.43
25	San Antonio, TX	SAT	69.9	51,151	\$ 246.30	\$ 12.28	50	West Palm Beach, FL	PBI	32.6	23,833	\$ 244.56	\$ 11.18

Note: Highlighted markets are the top unserved non-stop destinations

Our Air Service Needs – International

2024 Top 25 International Destinations						
Pax Rank	Destination Airport City	Airport Code	PDEW	Passengers	Avg Fared Fare	Fared Yield
1	Cancun, Mexico	CUN	31.5	23,093	\$ 288.07	\$ 8.36
2	Montego Bay, Jamaica	MBJ	27.2	19,889	\$ 336.31	\$ 7.81
3	London, UK	LHR	22.2	16,237	\$ 668.79	\$ 16.81
4	Punta Cana, DR	PUJ	19.9	14,569	\$ 365.53	\$ 7.28
5	Manila, Philippines	MNL	15.5	11,379	\$ 1,014.34	\$ 12.71
6	Toronto, ON	YYZ	12.0	8,810	\$ 268.02	\$ 39.15
7	Paris, France	CDG	10.9	7,951	\$ 767.09	\$ 12.56
8	Frankfurt, Germany	FRA	10.3	7,574	\$ 648.15	\$ 9.92
9	Tokyo, Japan	HND	10.1	7,415	\$ 1,006.16	\$ 12.88
10	Rome, Italy	FCO	10.1	7,412	\$ 805.97	\$ 11.75
11	Nassau, Bahamas	NAS	9.1	6,629	\$ 323.31	\$ 8.54
12	Aruba, Aruba	AUA	8.4	6,151	\$ 366.25	\$ 5.66
13	San Jose, Costa Rica	SJO	7.8	5,702	\$ 379.30	\$ 6.45
14	Liberia, Costa Rica	LIR	7.0	5,121	\$ 420.95	\$ 6.35
15	San Jose Del Cabo, Mexico	SJD	6.9	5,056	\$ 382.25	\$ 5.56
16	Amsterdam, Netherlands	AMS	6.8	5,014	\$ 766.86	\$ 13.41
17	Athens, Greece	ATH	6.8	4,988	\$ 895.65	\$ 12.29
18	Montreal, QC	YUL	6.5	4,790	\$ 283.45	\$ 38.54
19	Manama, Bahrain	BAH	6.0	4,423	\$ 1,069.66	\$ 9.50
20	Mexico City, Mexico	MEX	6.0	4,404	\$ 367.18	\$ 7.74
21	Munich/Augsburg, Germany	MUC	6.0	4,391	\$ 837.18	\$ 9.96
22	Vancouver, BC	YVR	5.5	4,036	\$ 477.02	\$ 13.39
23	Seoul, Republic of Korea	ICN	5.3	3,905	\$ 1,082.28	\$ 7.71
24	Madrid, Spain	MAD	5.1	3,756	\$ 739.03	\$ 10.13
25	Turks and Caicos	PLS	5.1	3,750	\$ 416.42	\$ 6.62

Top Unserved U.S. Transatlantic Markets

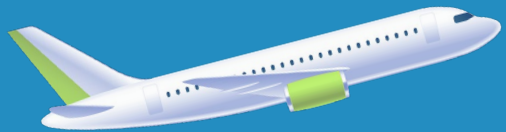
- **Kansas City** – 218,513 passengers (298.5 PDEW)
- **Jacksonville** – 181,213 (247.6)
- **San Antonio** – 181,172 (247.5)
- **Columbus** – 177,095 (241.9)
- **Fort Lauderdale** – 152,528 (208.4)
- **Charleston** – 123,682 (169.0)
- **Norfolk** – 123,495 (168.7)
- **Sacramento** – 119,791 (163.6)
- **Richmond** – 95,352 (130.3)
- **Louisville** – 95,299 (130.2)

Source: U.S. DOT T-100 data for 12 months ended September 30, 2024

We're in the game for international service!

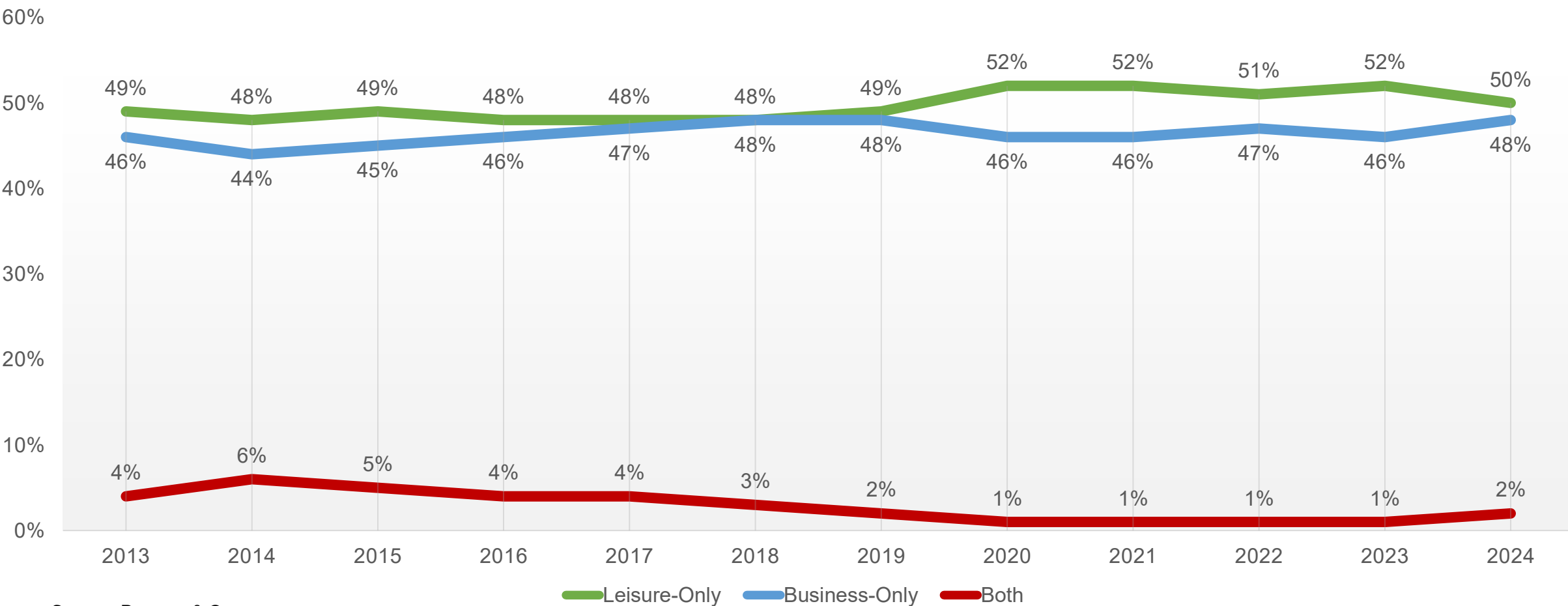


- **Build a Hampton Roads Coalition**
- **Collective efforts are essential**
 - Local governments and CVBs
 - Businesses and development agencies
 - General Assembly
 - Norfolk Airport Authority
- Regional leadership and support, including a mechanism to collect and disperse **financial incentives** airports cannot provide alone



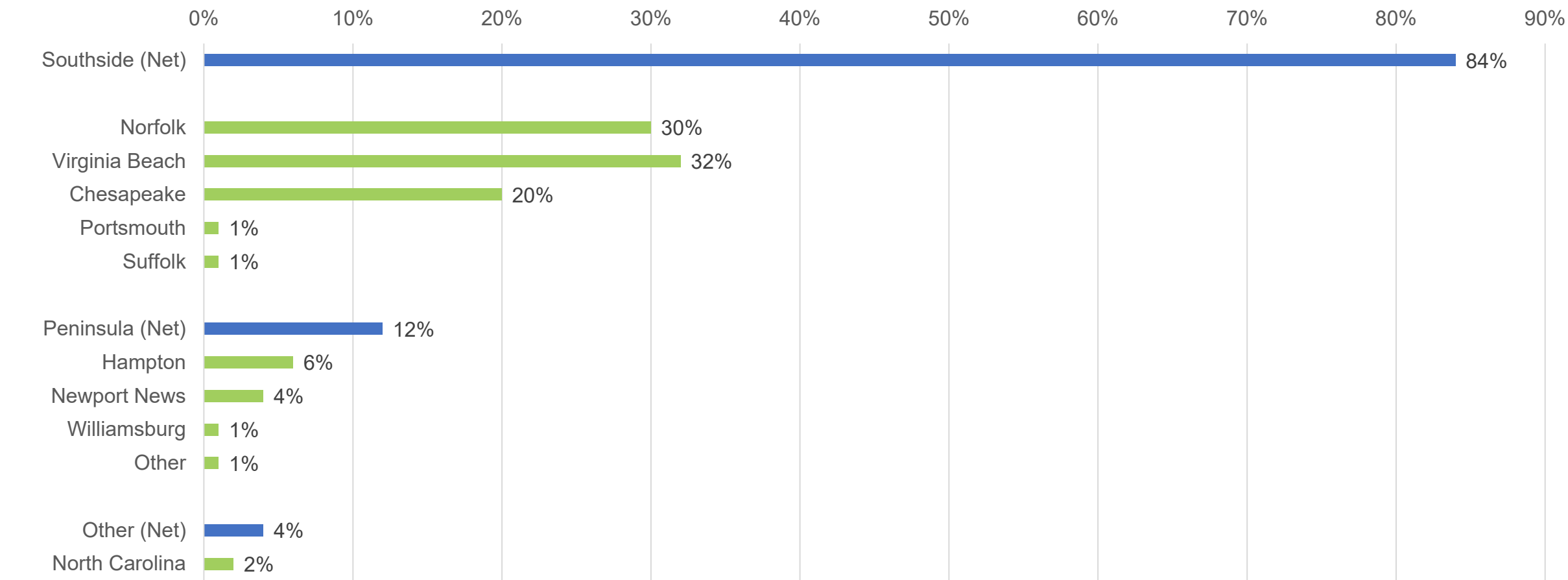
Passenger Profile

Purpose of Travel by Year



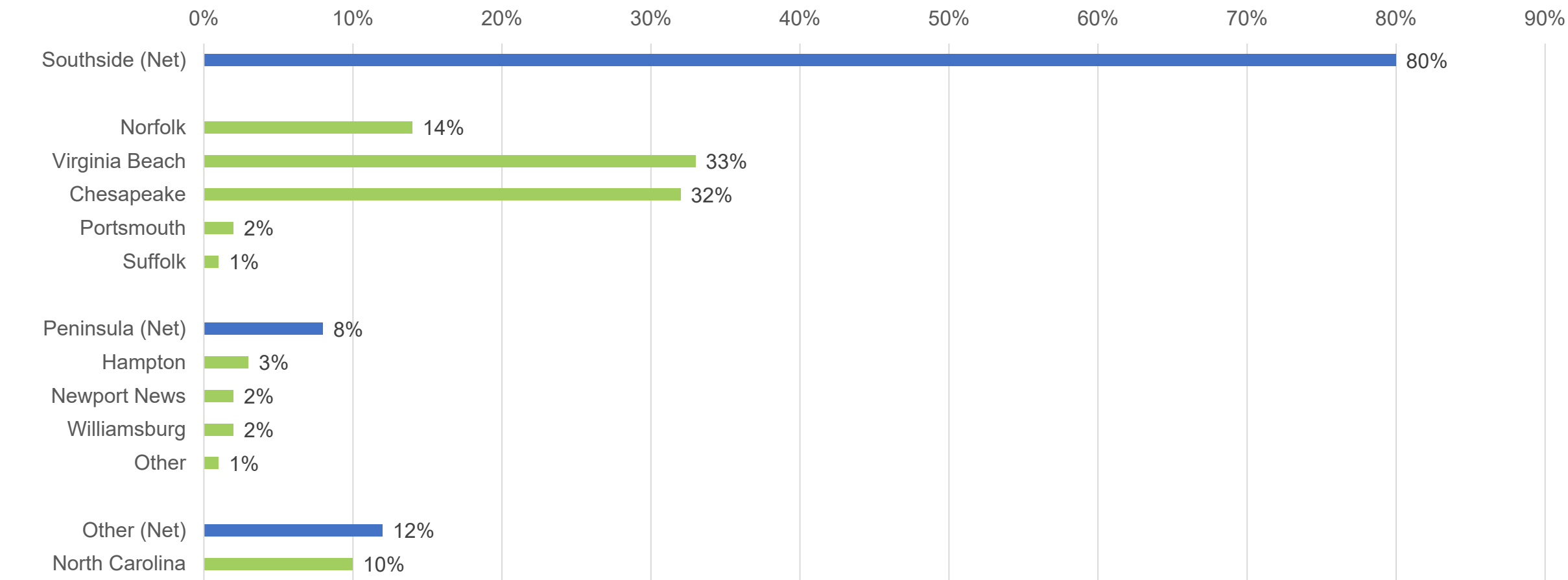
Source: Bonney & Company

Where Visiting Business Passengers Stayed



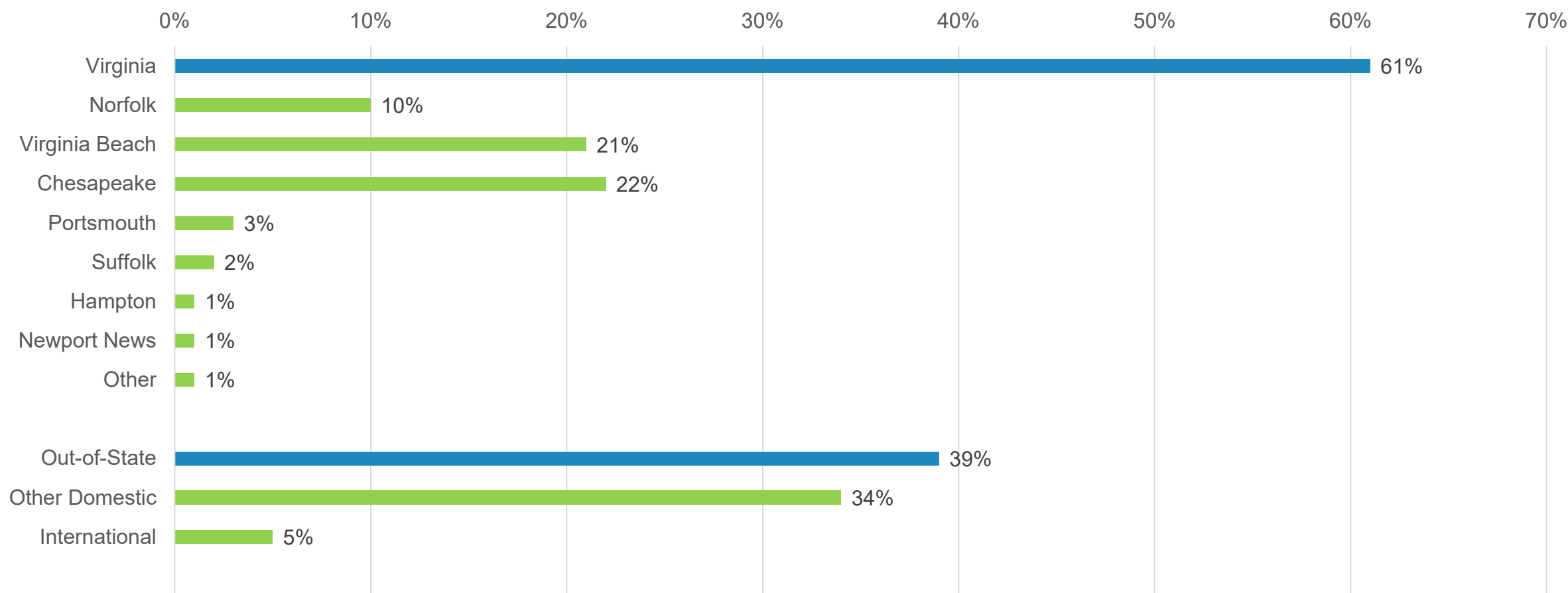
Source: Bonney & Company

Where Visiting Pleasure Passengers Stayed



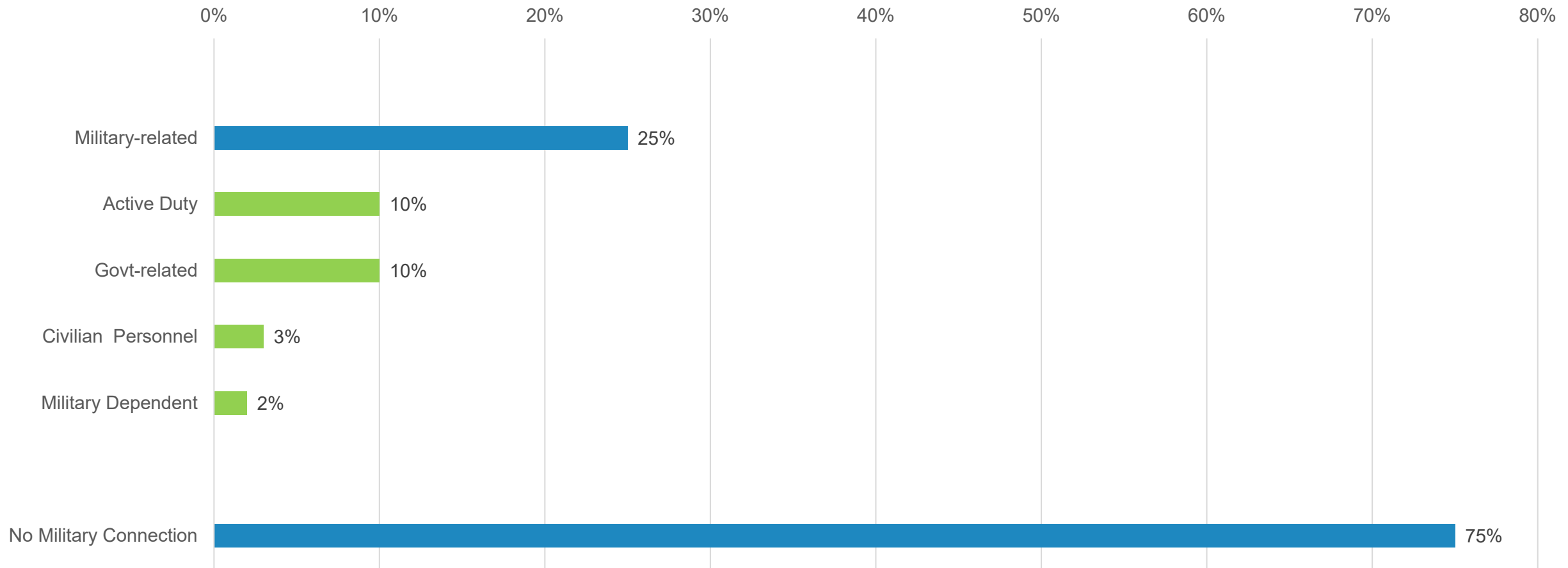
Source: Bonney & Company

Home Zip Code of ORF Travelers

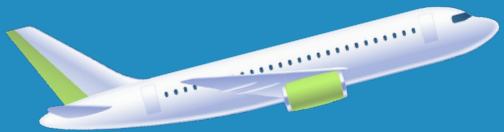


Source: Bonney & Company

Incidence of Military-Related Travelers



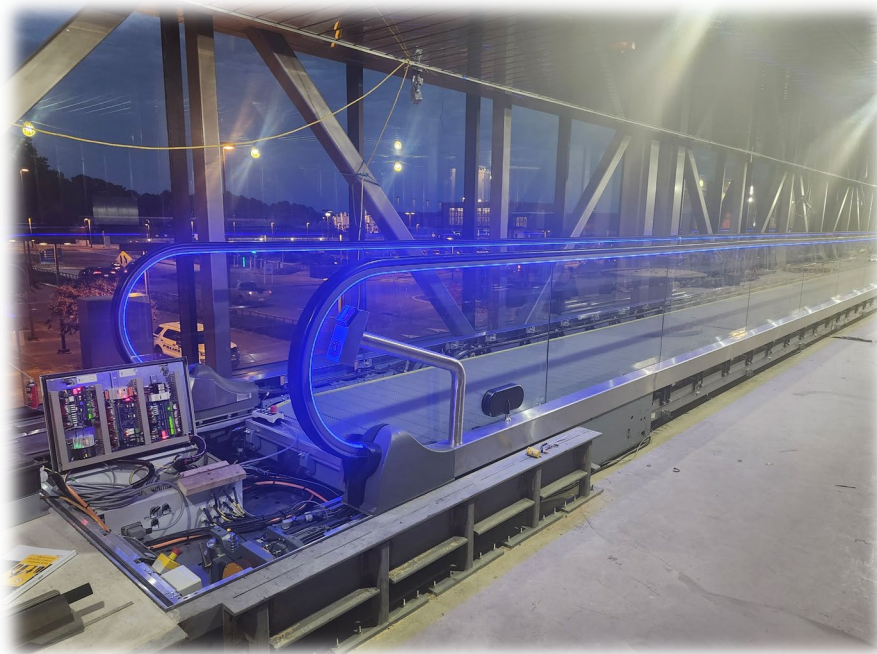
Source: Bonney & Company



A View to the Future of ORF

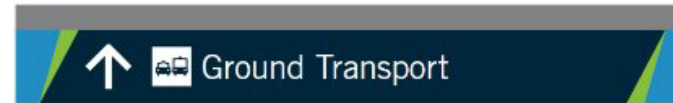
Moving Walkways

- Anticipated completion in July 2025
- Cost: \$2.5M



Interior Wayfinding

- Design Complete
- Contract Awarded
- Estimated Cost: \$3.0M



Typeface: Trade Gothic

Symbology: Custom symbols set (with modified accessible symbol to match a more standard look)



Alpha Expansion

- 3 Gate / Holdrooms
- New Restrooms / Pet Relief Area
- Estimated cost: \$25M
- Completion Dec 2025



CBP International Arrivals Facility

- Estimated cost: \$25M
 - \$3.0M Congressionally Directed Spending
 - \$6.0M IIJA/BIL ATP grant received
- Completion Jan 2026



Airport Hotel

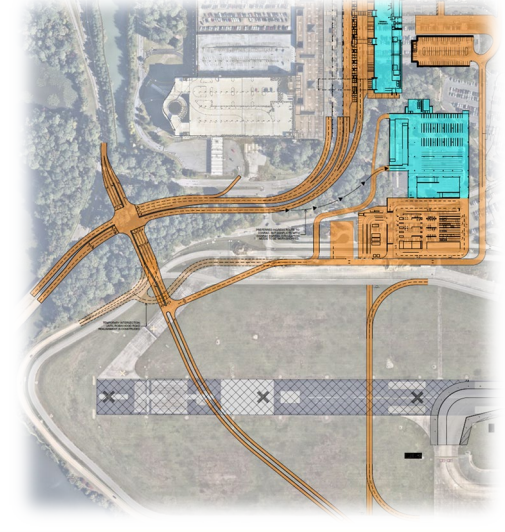
- Courtyard by Marriott
 - 165 rooms
 - Top Floor Restaurant & Bar
 - Covered connection to terminal





Main Entrance Intersection Improvements

- Realign and improve the intersection at the main entrance to the airport
- Award \$14.7M in IIJA/BIL ATP funds
- Construction to start Summer 2025



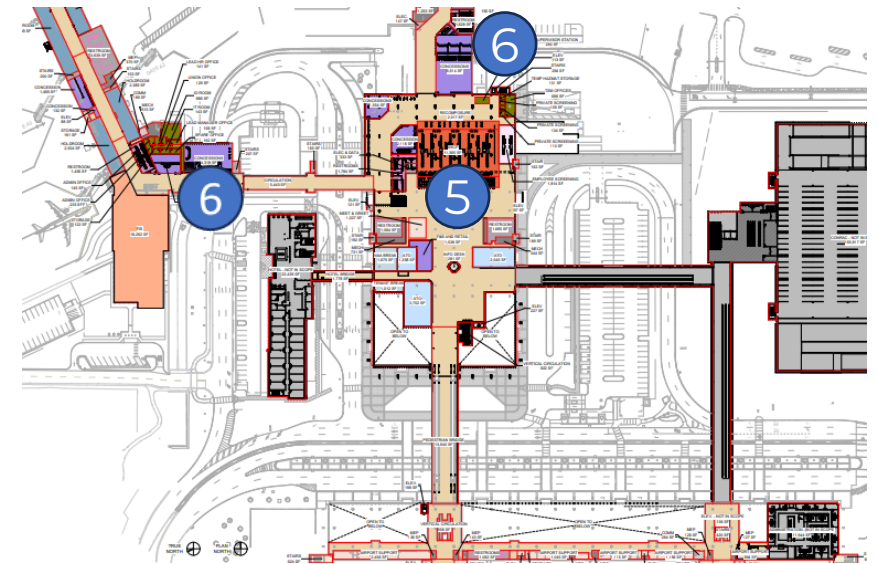
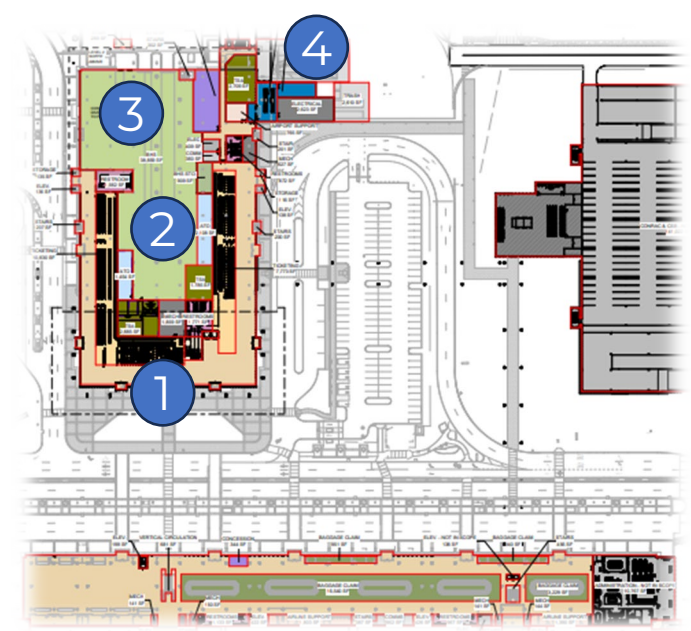
Consolidated Rental Car Facility

- Estimated cost: \$205M
- Consolidates all rental car operations into a single facility
- Includes a QTA reducing the need to take cars off airport for servicing



Terminal Development

- Project Scope:
 1. New Ticket Lobby Addition
 2. Consolidated Checked Bag Inspection
 3. Expanded Baggage Make-up Area
 4. New Shipping and Receiving Area
 5. Consolidated TSA Checkpoint
 6. New F&B, Retail Concessions
- CMaR under contract Summer '25
- Construction start Summer of '26
- Construction complete end of '28







Transform ORF Website

- Website provides updates on the terminal and ongoing projects
- Video found at www.TransformORF.com





RFP & Sample Agreement

RAC – RFP Schedule – Key Dates

- Issuance of the RFP Tue, July 1
- Preliminary Written Questions Due Wed, July 9, 4pm ET
- Pre-Bid Meeting Wed, July 16, 9am-12pm ET

- **Pre-Bid Follow-Up Written Questions Due to NAA** Tue, July 22, 4pm ET
- **NAA Addendum Issuance** Mon, July 28
- **Clarification questions due to NAA** Wed, July 30, 12pm ET
- **NAA Addendum Issuance** Mon, August 4

- **Proposals Due to NAA** Wed, August 27, 4pm ET

- Presentation to the NAA Board Thu, September 25, 1pm ET
- New Agreement Commencement Date Sat, November 1, 2025

RAC Request for Proposals – Key Terms

➤ Drivers for RFP:

- Purchasing / Counsel
 - New ConRAC
 - Updated terms and conditions
 - Upcoming bond financing

➤ Content:

- 15 pages, plus forms
- Authorized persons (corporate)
- Minimum Annual Guarantee
 - Current premises R/R
 - Permanent premises floor
- Company / Brands

➤ Agreement

- Execution 10 business days from award

RAC Request for Proposals – Key Items

Minimum Annual Guarantee

- Each company's bid must not be lower than that company's combined brands' MAGs for FY2025.
- Temporary Premises: Determines number of R/R stalls assigned to Company
- Permanent Premises (ConRAC): Determines selection of floor for Company

RAC Sample Agreement – Key Items

Disclosure

- Review the Sample Agreement
 - These slides are not binding but intended only as a summary of certain provisions in the Sample Agreement.
 - Any questions or open items regarding the Sample Agreement must be submitted in writing for consideration as part of the addendum.

RAC Sample Agreement – Key Items

Concession Agreement & Facility Lease

- Concession Agreement. This Agreement sets forth the obligations and privileges of Concessionaire with respect to the operation of the nonexclusive Concession at the Airport.
- Facility Lease. This Agreement sets forth the obligations and privileges of Concessionaire with respect to the use and occupancy of the Consolidated Facility at the Airport.
- Term.
 - Concession Agreement. Ten (10) years from effective date (November 1, 2025).
 - Facility Lease. Thirty (30) years from ConRAC operation commencement date (likely late 2027).

RAC Sample Agreement – Key Items

Temporary & Permanent Premises

- Temporary Premises (current facilities): counter, queue and office space in the Airport arrivals building and ready/return spaces and booth(s) in the parking garage (Garage A).
 - The temporary Premises will be designated as preferential space and assigned by the Authority.
 - The temporary Premises' counters, located in the terminal arrivals building, will be limited to one (1) brand per counter area.
- Permanent Premises (ConRAC): counter and office space in the customer service building, ready/return spaces in the Consolidated Facility garage, and the Quick Turn Around area including associated facilities and lots.
 - The permanent Premises may be designated as preferential or common space.

RAC Sample Agreement – Key Items

Payments

- Arrivals Terminal Building Rent. Temporary Premises at the arrivals terminal building on a per square foot basis at the signatory airlines' terminal rental rate for the applicable fiscal year.
- Ready and Return Parking Facilities Rent. Temporary Premises at the ready and return parking facilities on a per stall basis at the initial monthly rate of sixty dollars (\$60) per stall. A ready parking space is one stall and a return lane is equivalent to several stalls, depending on the length of the return lane.
- Ground Rent. Appraised Ground Rent commencing on the ConRAC Operation Commencement Date.
- Facility Rent Payments. Facility Rent commencing on the ConRAC Operation Commencement Date. For the Debt Service, Operating Expenses, Impositions, and related costs of the Consolidated Facility.
 - Facility Rent due for Debt Service will be paid by CFCs.
 - Facility Rent due for Operating Expenses will be determined on a per square foot basis, a per stall basis, a fixed fee basis, and/or a market share basis.
 - Contingent Rent. Charged if there is a rent deficiency. Reimbursement from CFCs.

BREAK

9:00 – 9:10 Check-In & Welcome (NAA Board Room)

9:10 – 9:30 Introduction

ORF Transform Program

9:30 – 10:45 Request for Proposals & Sample Agreement

RFP schedule

RFP key items

Sample Agreement key items

RAC preliminary written questions and new questions

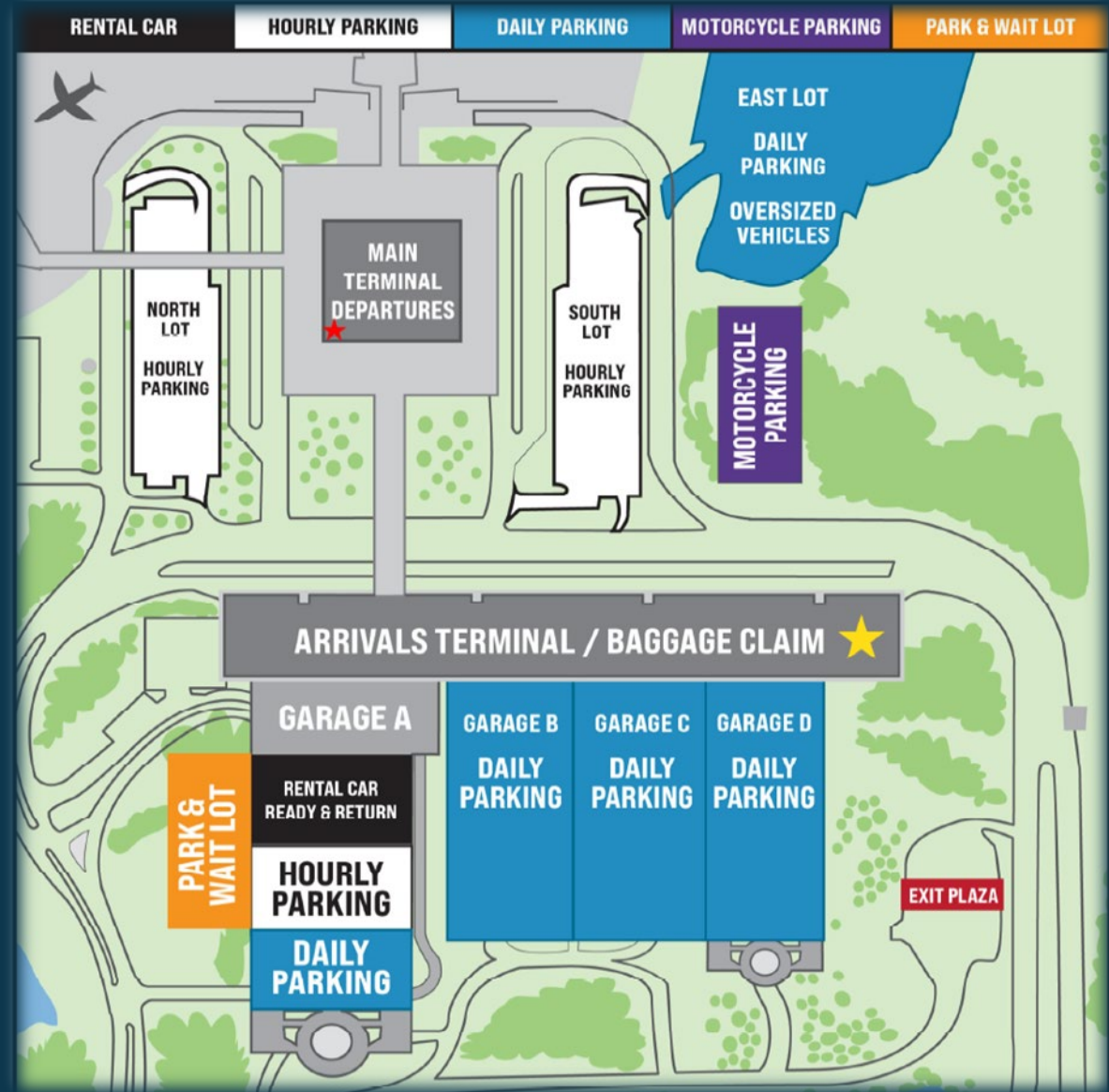
10:45 – 11:00 Break

11:00 – 11:40 Parking Garage A walkthrough

** Meet at RAC Counter Area **

11:40 – 12:00 Reconvene (NAA Board Room)

Final post-tour questions (RACs will submit new questions requiring a written response in writing post-Pre-Bid Meeting)



[ORF Video](#)

Post-Walkthrough Questions

On-Airport Rental Car Concession Program
RFP Pre-Bid Meeting

Pre-Bid Follow-Up Written Questions Due - Tue, July 22, 4pm ET

JULY 16, 2025

[ORF Video](#)