



ICAO

UNITING AVIATION



ICAO

Regional Air Transport Conference

Setting the Scene

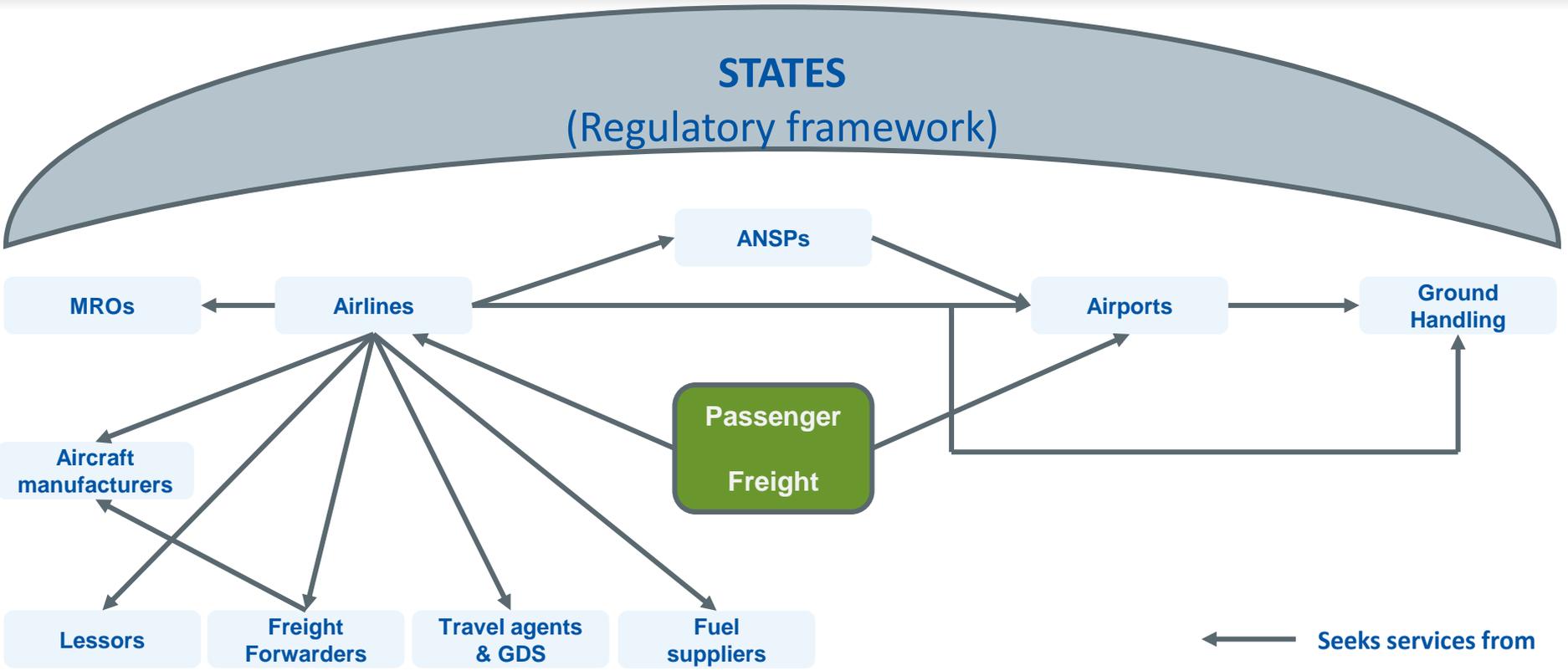
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Montego Bay, Jamaica, 7-9 October 2014







- UN specialized agency, created in 1944 upon the signing of the Convention on International Civil Aviation (Chicago Convention); 191 Member States
- Develops international SARPs and policies/guidance
- Ongoing mission: support and enable a global air transport network that meets or surpasses the social and economic development and broader connectivity needs of global businesses and passengers

Doc 7300/9



Convention on International Civil Aviation

Convention relative à l'aviation civile internationale

Convenio sobre Aviación Civil Internacional

Конвенция о международной гражданской авиации

This document supersedes Doc 7300/8.
Le présent document annule et remplace le Doc 7300/8.
Este documento reemplaza el Doc 7300/8.
Настоящий документ заменяет Doc 7300/8.

Ninth Edition — Neuvième édition — Novena edición — Издание девятое — 2006

International Civil Aviation Organization
Organisation de l'aviation civile internationale
Organización de Aviación Civil Internacional
Международная организация гражданской авиации

Preamble

THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically;

Cooperating on Global Aviation Progress:
Celebrating 70 Years of the Chicago Convention

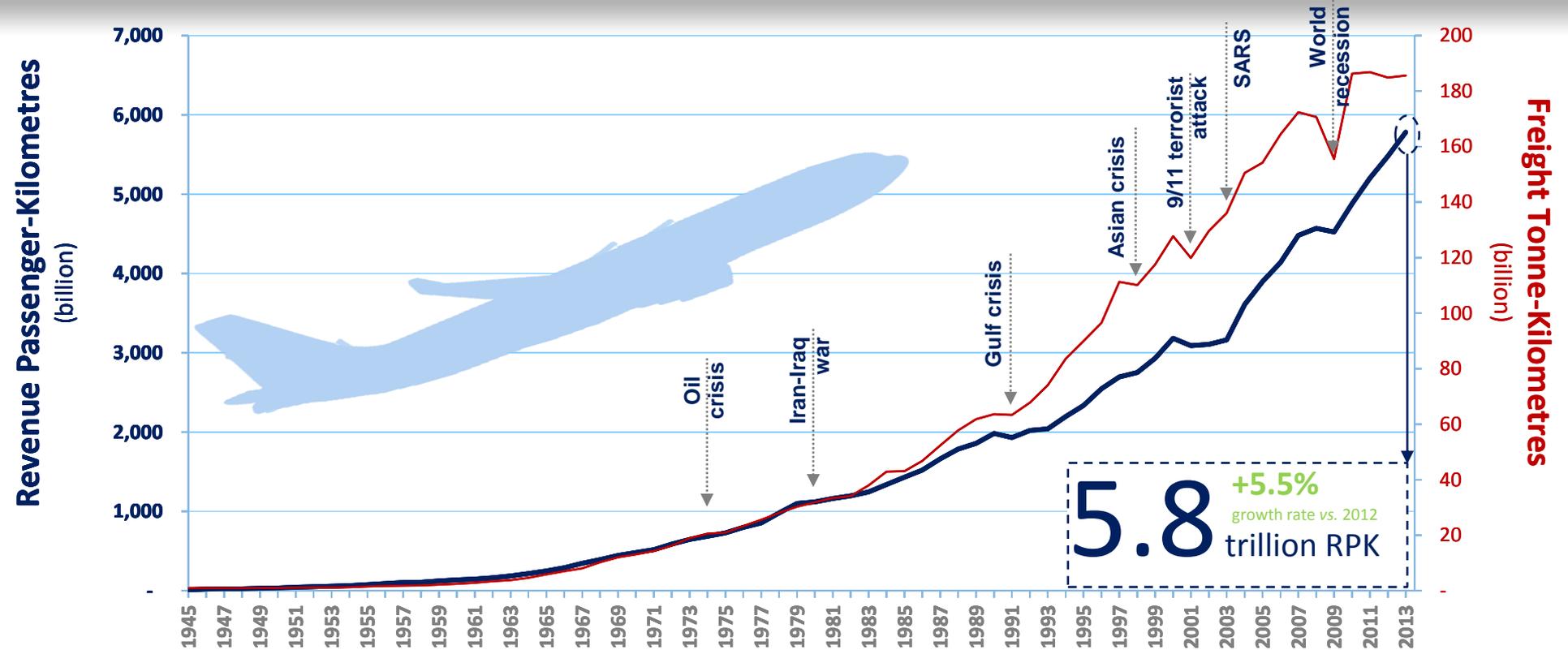


1944-2014

UNITING AVIATION
L'AVIATION UNIE
UNIENDO A LA AVIACIÓN
ОБЪЕДИНЯЕМ АВИАЦИЮ
团结航空
لنوحّد الطيران



- **Safety**
- **Air Navigation Capacity and Efficiency**
- **Security & Facilitation**
- **Economic Development of Air Transport**
 - Foster the **development** of a **sound** and **economically-viable** civil aviation system
 - State-recognized need for **ICAO's leadership** in harmonizing the air transport framework focused on **economic policies** and **supporting activities**
- **Environmental Protection**



5.8 trillion RPK
 +5.5% growth rate vs. 2012

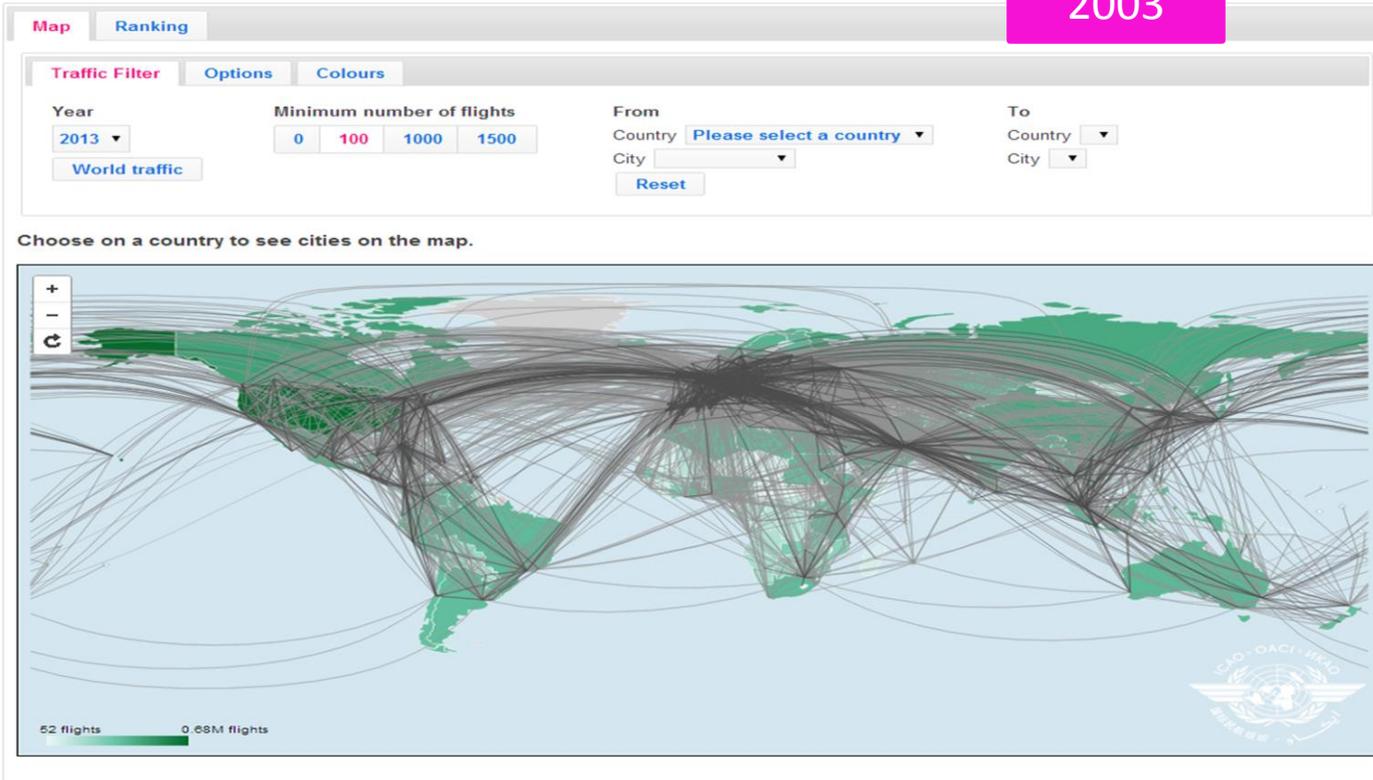
Scheduled commercial traffic

Total (international and domestic) services

Source: ICAO Annual Reports of the Council (preliminary figures)

Traffic Networks Development 2003 vs. 2013

2003



Number of routes increased by 30% in the last decade showing the dramatic growth of new regional hubs and the challenges for infrastructure needs

- 3.1 billion passengers
- 49 million tonnes of freight
- 1 000 scheduled airlines
- 26 000 aircraft in service
- More than 4 000 airports
- 170 air navigation providers

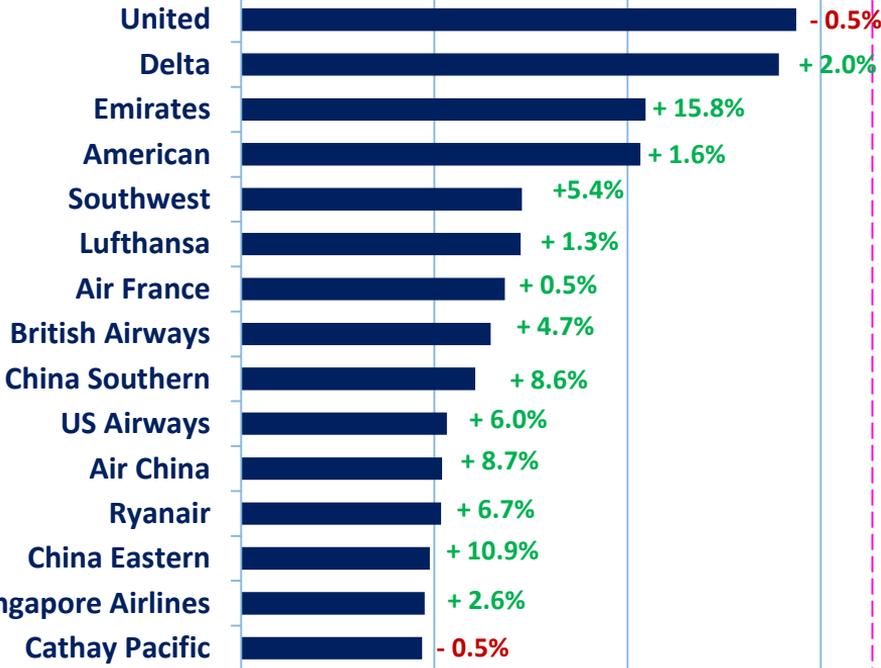


Traffic is for scheduled services in 2013

World Top 15 Airlines in 2013

RPK (billion)

100 200 300



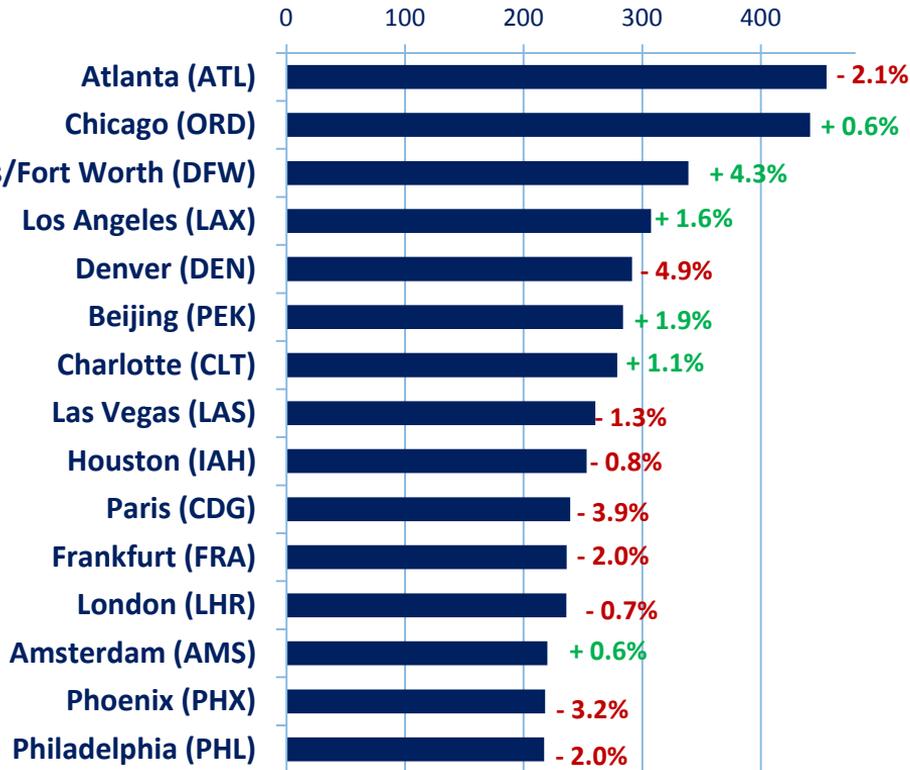
- 5 carriers from **North America**
- 5 carriers from **Asia/Pacific**
- 4 carriers from **Europe**
- 1 carrier from **Middle East**
- 2 **low-cost carriers**: Southwest and Ryanair
- **Highest growth** → Emirates
with **+15.8%** RPK growth in 2013 vs 2012

Note: scheduled services

Source: ICAO Form A and ICAO estimates

Total (international and domestic) services

Departures (thousand)



- 10 airports in **North America**
(including the Top 5)
- 4 airports in **Europe**
*(3 of them recorded **negative growth**)*
- 1 airport in **Asia/Pacific**:
Beijing (PEK)

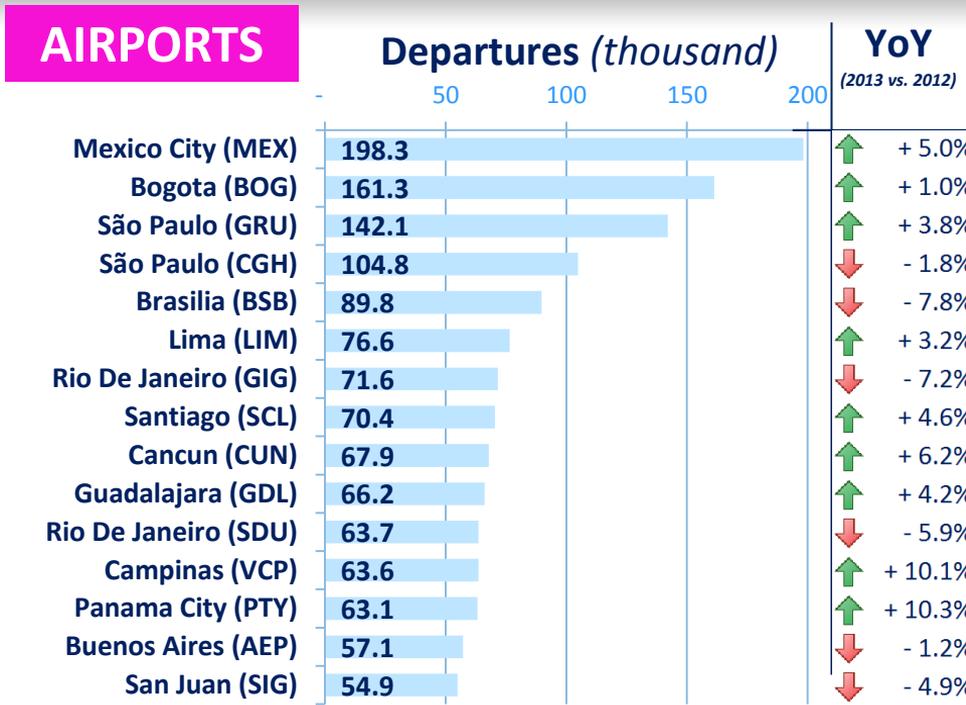
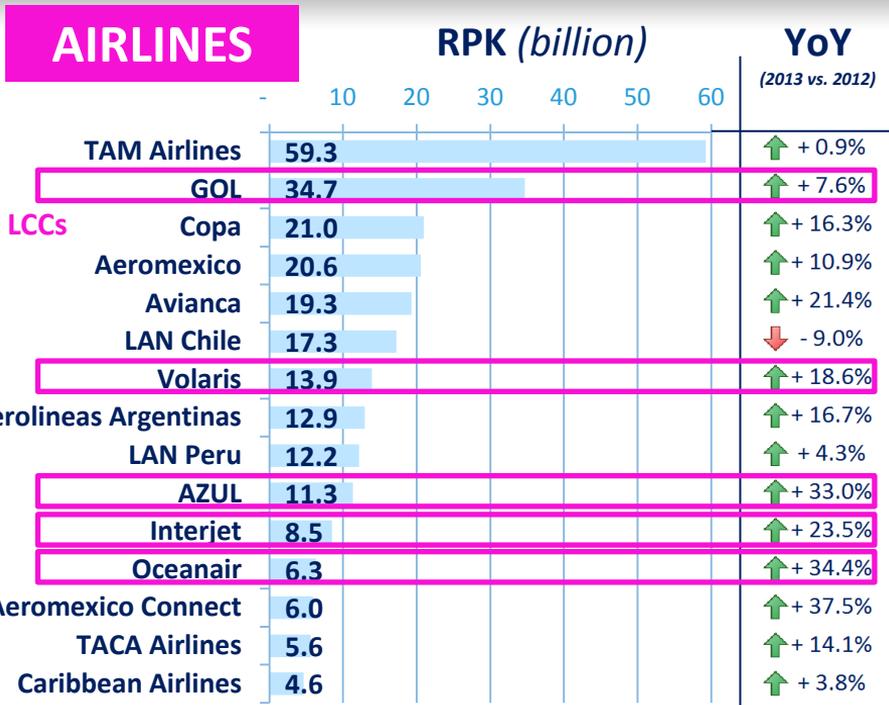
Note: scheduled and non-scheduled services

Source: ACI

Total (international and domestic) services



Latin America/Caribbean Top 15 Airlines - Top 15 Airports



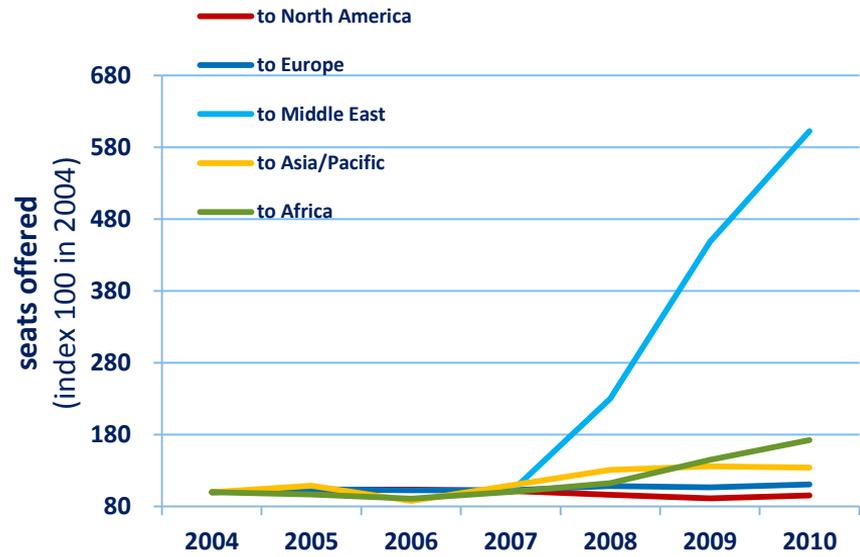
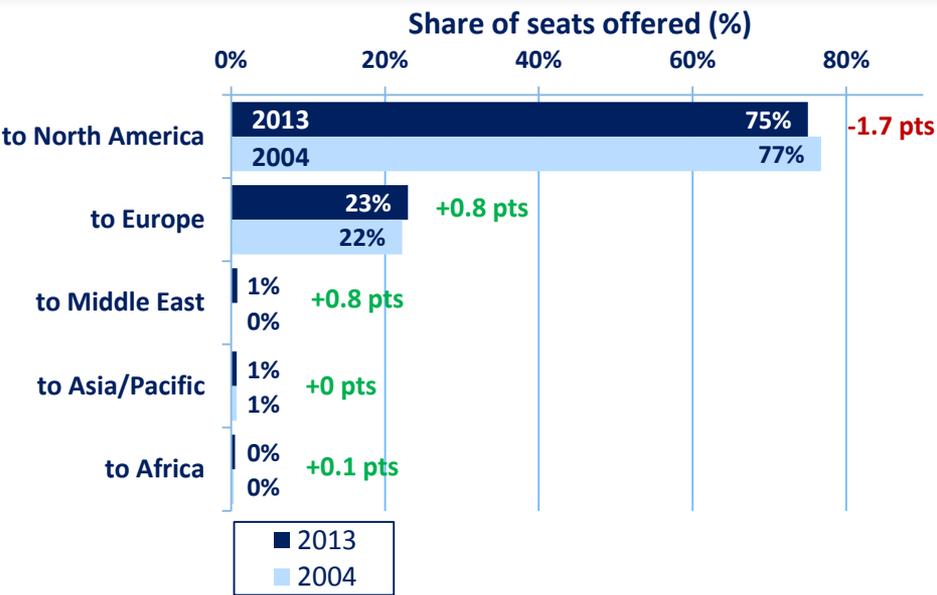
- The Top 15 airlines accounts for 84% of the traffic of the Region
- 1st and 2nd airlines are Brazilian - 4 Mexican airlines in the Top 15
- 5 LCCs in the Top 15

- Each airport of the Top 3 recorded an increase in 2013
- 6 Brazilian airports in the Top 15
- 2 airports serving São Paulo (GRU and CGH) ranked in the Top 5

Note: total (int. and dom.) scheduled services
Source: ICAO Form A and ICAO estimates

Note: total (int. and dom.) scheduled and non-scheduled services
Source: ACI

Inter-region capacity offered from Latin America/Caribbean



FROM LATIN AMERICA/CARIBBEAN:

- **1st destination:** to North America (-1.7 pts) → **75% of seats offered**
- **Fastest growth** destination: to Middle East → few seats offered
- Distribution of seats offered among regions is very **unbalanced**



Definition of Air Transport Connectivity

Movement of passengers, mail and cargo involving the **minimum of transit points**

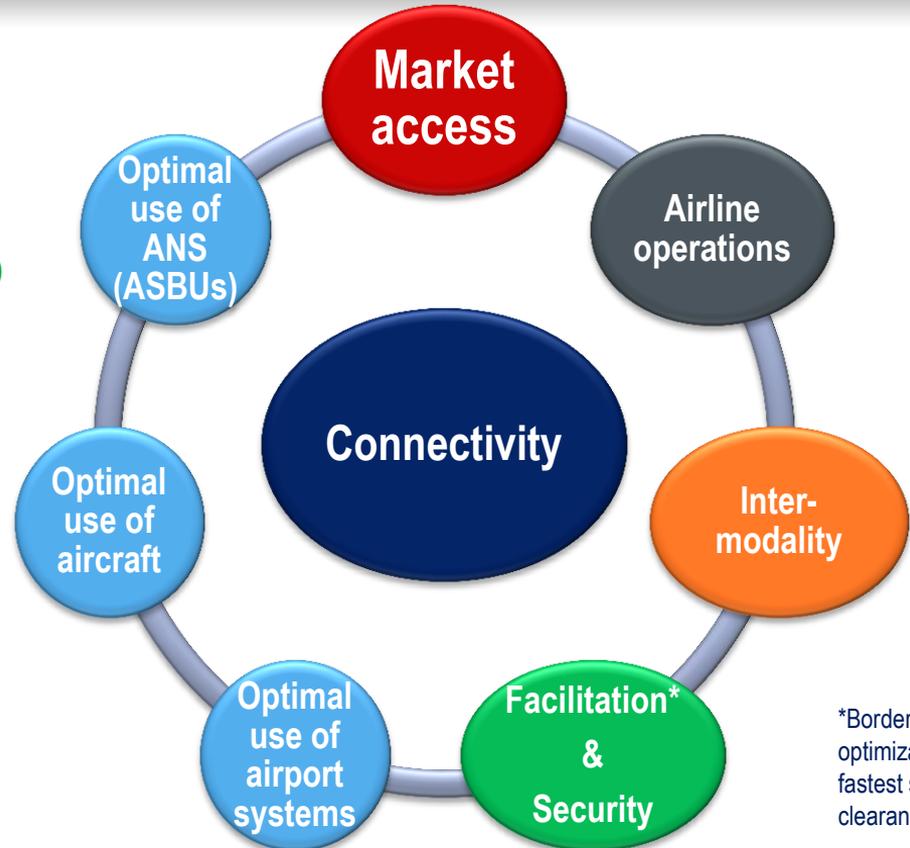
- which makes trip as **short** as possible
- with **optimal** user satisfaction
- at the **minimum** price possible

Connectivity components

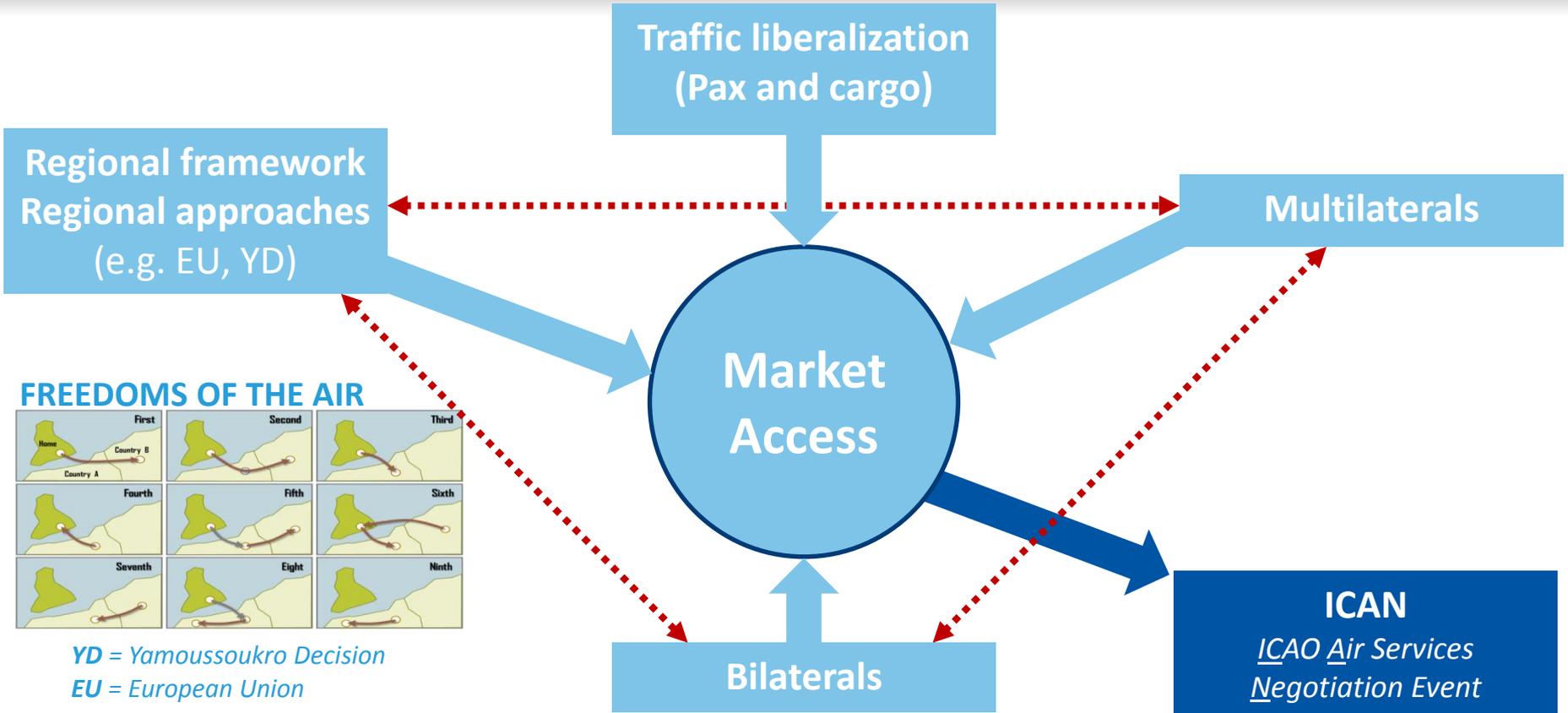
Connectivity needs a strong supporting framework

This includes

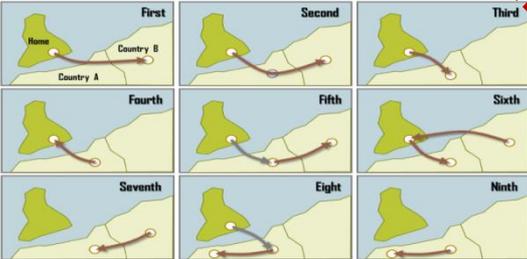
- **Market access** (e.g. liberalization)
- **Facilitation** (border control optimization)
- **Security** (fastest clearance)
- **Optimal use of:**
 - air navigations services (incl. ASBUs)
 - Aircraft
 - Airport systems
- **Intermodality**
- **Airline operations**



*Border control optimization and fastest security clearance



FREEDOMS OF THE AIR



YD = Yamoussoukro Decision
EU = European Union



Liberalization of market access



| ATConf/6 recommended action | Action | Target timelines |
|---|--|---|
| <p>Develop a long-term vision for international air transport liberalization (Priority A)</p> | <ul style="list-style-type: none"> - At the twelfth meeting of Air Transport Regulation Panel (ATRP/12) a text of the vision was agreed to for the consideration by governing bodies - States to be consulted on the vision for adoption by Council in 2015 | <ul style="list-style-type: none"> - 2nd Q 2014 done - 4th Q 2014 - 1st Q 2015 |
| <p>Develop an international agreement for States to liberalize market access (Priority A)</p> | <ul style="list-style-type: none"> - ATRP/12 considered initial proposals; established a Working Group (WG1) to develop draft text of the agreement - To be considered by ATRP/13 in April 2015 - ATRP will present proposal to governing bodies in late 2015 or early 2016 | <ul style="list-style-type: none"> - 2nd Q 2014 to 1st Q 2015 - 2nd Q 2015 - 4th Q 2015 or 1st Q 2016 |



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A United Nations Specialized Agency

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2014 ICAO Air Services Negotiation Event

ICAN 2014 will take place 17-21 November 2014 in Bali, Indonesia, and includes an Air Transport Symposium on current trends and developments - read more...

Air Cargo
Africa Event

Air Cargo
China Event

Aviation
Security
Innovation

ICAO Green
Tech Seminar

Business
Class 2014
Symposium

ICAN 2014

Latest News

Ukraine Requests ICAO Assistance in MH17 Accident Investigation | 18/7/2014

ICAO Meteorological Meeting Delivers Important Recommendations Supporting Future 'SWIM' Environment | 18/7/2014

See more ...

Upcoming Meetings & Events

New Technologies Working Group (NTWG), Request for Information from Vendors | Montréal, Canada | 21/7/14 - 25/7/14

ICAO
website



| Venue/Year | 2008 Dubai, UAE | 2009 Istanbul, Turkey | 2010 Montego Bay, Jamaica | 2011 Mumbai, India | 2012 Jeddah, Saudi Arabia | 2013 Durban, South Africa | 2014* Bali, Indonesia |
|---|--------------------|-----------------------------|------------------------------------|--------------------------|---------------------------------|---------------------------------|-----------------------------|
| Number of participating States | 27 | 52 | 38 | 64 | 62 | 73 | 63 |
| Number of bilateral meetings held | 100 | 200 | 200 | 370 | 350 | 486 | |
| Number of agreements (including Open Sky Agreements) and arrangements (MoUs, Agreed Minutes, etc.) signed | 20 | 60 | 60 | 120 | 130 | 458 | |

- **Improve efficiency of negotiations**
 - A place to meet for multiple ASA talks
 - A forum to get info, discuss issues
 - A platform for bilateral, multilateral talks

- **Save time and money for States**

ICAN 2015: Turkey

ICAN 2016: Latin America

*Pre-registered States as of Sep 2014



| ATConf/6 recommended action | Actions taken by ICAO | Target timelines |
|---|--|---|
| Develop a compendium of competition policies and practices of States and regional bodies | <ul style="list-style-type: none">-Preliminary version prepared in 2013-ATRP/12 reviewed, endorsed and set up a Working Group (WG2) to assist further work on this task-Updates of the compendium on going | <ul style="list-style-type: none">-1Q 2014 done-3Q 2014 to 2Q 2015-On going |



International agreement on air carrier ownership and control



| ATConf/6 recommended action | Action | Target timelines |
|--|--|---|
| Develop an international agreement to liberalize air carrier ownership and control (O&C) (Priority A) | <ul style="list-style-type: none">- Task to be undertaken by ATRP/12 Working Group 1 (WG1)- To be considered by ATRP/13 in April 2015- ATRP will present proposal to governing bodies in late 2015 or early 2016 | <ul style="list-style-type: none">- 3Q 2014 to 1st Q 2015- 2nd Q 2015- 4th Q 2015 or 1st Q 2016 |

| Before the travel | During the travel | After the travel |
|--|--|--|
| <ul style="list-style-type: none">• Balance passenger rights/industry competitiveness• Pre-travel information, including price transparency | <ul style="list-style-type: none">• Assistance/compensation, as provided by regulations or contract• Coordination between stakeholders to address "massive disruptions" | <p>Efficient complaint handling procedures</p> |

Proposed complementing guidance: (i) enhanced definition of “massive disruptions”;
(ii) Contingency mechanisms ;
(iii) scheduled and non-scheduled traffic.

Next step: Submit these core principles for review by the FAL Panel for consideration to be included in Annex 9 - Facilitation



Air transport system modernization



| ATConf/6 recommended action | Actions taken by ICAO | Target timelines |
|--|---|---|
| multi-disciplinary working group to consider the challenges associated with the establishment of operational and economic incentives | <p>MDWG-ASBU/1 met on February 2014</p> <ul style="list-style-type: none">• 2 Co-Secretaries: 1 ATB + 1 ANB• 51 participants: 13 Member States, 12 organizations.• List of Tasks to be delivered• MDWG-ASBUs/2 in February 2015 | <p>1Q 2014 Completed</p> <p>4Q 2014</p> <p>1Q 2015</p> |



- Convention on International Civil Aviation (Doc 7300)
- Convention for the Unification of Certain Rules for International Carriage by Air of 28 May 1999 (Doc 9740)
- Working Papers for the Sixth Air Transport Conference (ATConf/6)
- 38th session of the ICAO Assembly (A38 website) Working Papers of the Economic Commission (EC) (Notably WP/56)
- Assembly Resolutions in Force: A38-14 : Consolidated statement of continuing ICAO policies in the air transport field
- ICAO/UNWTO Joint Statement, 18 March 2013
- ICAO/World Customs Organization
 - Moving Air Cargo Globally
 - Joint Communiqué on Enhancing Air Cargo Security and Facilitation – Collaborative Solutions to Future Challenges (Manama, Bahrain 17 April 2014)
 - Joint Communiqué on Enhancing Air Cargo Security and Facilitation – Synergy through Cooperation (Singapore, 6 July 2012)
- Multilateral Agreement on Open Skies for Members of the Commission Latin American Civil Aviation (LACAC)



Thank you

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