

MINUTE
NORTH AMERICAN, CENTRAL AMERICAN AND CARIBBEAN (NACC) DIRECTORS OF CIVIL AVIATION
COVID-19 VIDEOCONFERENCE

24 April 2020

List of Participants

Refer to **Attachment A**.

Agenda:

Refer to **Attachment B**.

Objective: a) Discussion with States on actions taken and being taken on COVID-19 in the NAM/CAR Regions by ICAO, the States and the industry; and b) agreement on future actions for aviation recovery in this region.

Introduction

1. Mr. Melvin Cintron, Regional Director, ICAO NACC Regional Office welcomed participants and highlighted ICAO's commitment at this critical time faced by aviation. He also stressed the importance of leadership during this crisis. He mentioned that including different players in the recovery plans, particularly the industry, is critical to achieve effective, prompt and harmonized actions.
2. Dr. Fang Liu, ICAO Secretary General, wished a successful regional recovery from COVID-19, explaining that ICAO is doing everything in its capacity, whether at the global or regional levels, to accelerate this recovery of the States' air transport sectors. In order to achieve this, international cooperation and funding is needed, and all parties must be involved on a clear and coordinated basis. Moreover, she emphasized the need to address current NACC States' financial commitments to ICAO in order to assure the support of this agency.
3. Each participating State/Territory mentioned their individual situation and thanked ICAO for its leadership and the outstanding and valuable arrangements for the videoconference initiative to reactivate aviation, sharing its current mitigation actions and best practices. All the NACC States/Territories, CASSOS and LACAC, Representatives of Canada, France, Netherland and United Kingdom missions in ICAO Headquarters also expressed their interest on the recovery actions. UNWTO expressed support to this initiative, which will unite efforts for the benefit of the States, their tourism and related sectors

ICAO Presentations by NACC Regional Office, Air Transport Bureau, Chief Aviation Medicine and Air Navigation Bureau – with Interventions from LACAC

4. The presentations can be found at the following link:
<https://www.icao.int/NACC/Pages/meetings-2020-naccdcavideoconferences.aspx>.
5. The ICAO NACC Regional Office, through its presentation, informed on the following urgent actions carried out concerning COVID-19 pandemic:

- Assist States with the business continuity of their aviation sector as well as with their responses to aviation aspects of COVID-19
- Provide emergency advice to States, Territories and International Organizations
- Provide a regional forum to serve NACC States to discuss and share actions and best practices regarding COVID-19 (DGs chat group, ANS chat group, ICAO website)
- Guidance to States and Territories on regulatory, operational and other implementation matters
- Guidance to States on regulatory compliance deviations
- Sharing of individual State/Territory decisions that may affect international operations
- Consideration of alternative ways of conducting ICAO business
- Funding support strategies assistance

6. Participants recognised the importance of following the guidelines and guidance issued by ICAO to mitigate the adverse effects of the pandemic, the actions taken on COVID-19 contingency, preparedness for the hurricane season in the region, and explanations for the implantation of operational and travel restrictions.

7. Likewise, participants thanked on-going actions by ICAO on recovery/restart preparation concerning COVID-19 and the hurricane seasons, and its continued assistance to States/Territories. The following are valid and relevant related websites:

- ICAO NACC COVID-19: <http://www.icao.int/NACC/Pages/NACC-COVID-19.aspx>
- CAPSCA Coronavirus COVID-19 Website: <http://www.capsca.org/CoronaVirusRefs.html>
- Aviation and COVID-19: <https://www.icao.int/Security/COVID-19/Pages/default.aspx>
- COVID-19 Safety Operational Measures: <https://www.icao.int/safety/COVID-19OPS/Pages/default.aspx>
- Global COVID-19 Airport Status: <https://www.icao.int/safety/Pages/COVID-19-Airport-Status.aspx>

8. The economic impact for air transport was mentioned during the Air Transport Bureau's presentation, where economic effects were shown as well as scenarios to analyse the impact of COVID-19 outburst for air transport, specifically for regular international passengers in the first half of 2020 (1st and 3rd quarters of 2020) Scenarios include (among other considerations):

- Scenario considering a V shape path: a first sign of recovery in late May
- Scenario considering a U-shaped path: prolonged contraction until September

9. These and other such scenario models are multi-factorial and among the more important factors are the duration and magnitude of the outbreak, containment measures, the degree of consumer confidence in air travel and economic conditions, etc. Refer to **Attachment C**.

10. Similarly, participants were informed of the measures being taken to support the States in preparing their safety measures related to COVID-19. It was explained how experts nominated by the States to the different Panels and working groups of Headquarters are made available to all the States to prepare Quick Reference Guides (QRGs) on specific topics. States were also urged to be flexible with

their positions, while observing their obligations under the Convention on International Civil Aviation (Doc 7300, Chicago Convention) and to use the related dispute notification subsystem with the contingency by COVID-19 Contingency Related Differences (CCRD) to inform other States of safety measures related to COVID-19 that would be acceptable to facilitate compliance with Article 40 of the Convention

11. The Meeting took note of the information and training courses and tools produced by ICAO Collaborative Arrangement for the Prevention and Management of Public Health Events in Civil Aviation (CAPSCA) and the cooperation of a strong network of professionals and experts in the aviation medical and public health arena. The current works to assemble a reasonably concise set of overarching requirements agreeable to public health stakeholders and considered feasible by the aviation regulators and operators to further enhance and streamline the procedures that aircrew need to be subjected to in order to resume more normal cargo flight operations schedules was highlighted. Similarly, work is ongoing to build on the international health regulations to design a set of requirements and procedures tailored to the current pandemic in order to build support in Member State public health administrations, so that they will in turn empower civil aviation regulators to approve the implementation of these protocols.

12. With regard to recovery plans, the concept of recovery informed by ICAO was mentioned (refer to ICAO conceptual note included in **Attachment D**), where possible recovery scenarios are outlined and short, long and mid-term guidelines were highlighted as follows:

- each State should play a primary role in the recovery of its own air transport through the implementation of globally-harmonized, efficient public policies and strategies
- Challenges faced by the aviation industry amid the crisis
- COVID-19 issues likely to be encountered on the recovery path
- Key concepts for the preparation and implementation of recovery measures

13. In order to support Member States during the COVID-19 pandemic, the Technical Cooperation Bureau (TCB) will be developing and deploying Implementation Packages in line with the immediate and longer term needs identified by the Air Navigation Bureau, Air Transport Bureau and ICAO Regional Offices. TCB is closely coordinating with the above mentioned bureaux and offices to support Member States address their pressing needs with regards to the various attributes linked to a Public Health Event of International Concern (PHEIC). Additionally, TCB is collaborating with other UN agencies to leverage Long Term Agreements (LTAs) in place with equipment suppliers in order to allow Member States access to these services and equipment in an expeditious manner.

14. The LACAC Secretariat highlighted that the COVID-19 pandemic has created a global atmosphere of uncertainty and contradictions. Uncertainty, because the scenario of the pandemic is constantly changing and there is no clarity as to when a vaccine or treatment can be distributed to a significant percentage of the world population. Contradiction, because although the experience of other crises allows us to maintain that fear can be more destructive than the virus itself, it is not easy to transmit optimism, because there is a general warning that the worst is yet to come. Indeed, the NAM/CAR Regions are in the first wave of the virus and it is reasonable to accept the forecast that there will be more than one wave. Uncertainty and contradiction have centralized decisions, in such a way that several decisions that were previously taken at the aeronautical level, are now taken in other entities, for example, in the Ministries of Health, which has produced a fragmentation that generates a

additional barrier to the recovery of international air transport, which requires uniform and harmonized standards for its development.

15. Consequently, the measures that States adopt to overcome the crisis are crucial to regain confidence and provide certainty to passengers. But the measures adopted in the aeronautical sector are not enough; the same certainties are also required in the measures adopted in the tourism sector. Finally, the measures to be adopted should be simple, transparent, flexible and harmonious.

16. The LACAC Secretariat further explained that, from the outset, coordination was carried out with the ICAO NACC and SAM Regional Offices in order to join efforts and avoid duplication of work. As part of this cooperation, the three organizations have jointly called experts to study measures to develop air cargo in this period. The work methodology is under development and does not exclude the integration of experts in other groups that are formed in the region.

Intervention of Industry Participants –IATA and ALTA, ACI-LAC, CANSO and IDB

17. IATA mentioned COVID-19 impact on air transport in Latin America, highlighting the following:

- A halving of RPKs is expected in globally in 2020, meaning a revenue loss of US\$314 billion is anticipated
- 3.5 million jobs are at risk in Latin America/Caribbean due to the disruptions to air travel caused by the spread of COVID-19
- Only in Latin America/Caribbean US\$ 77 billion in GDP is at risk due to the disruptions to air travel.

18. IATA commented that COVID-19 has brought the aviation industry to a standstill. Over 180 countries, representing more than 95% of global air traffic, have imposed restrictions on travel, of which the majority comprises either partial or total bans on international travel. Accordingly, getting the aviation industry back in the air again will be an unprecedented challenge and require collaboration across the value chain and with Governments.

19. IATA indicated that travel is highly unlikely to resume at the same rate all over the world – domestic markets are likely to get going first, followed by bilateral or regional opening up. But it is needed to ensure as far as possible that the approaches adopted are consistent so that a patchwork of measures is avoided. Given the scale of the task, IATA has broken the reactivation plan into two tracks with the expectation that they will ultimately converge at the point of full restoration:

- **Airlines restart** – Ensure that airlines are able to restart operations and the passenger process supports the safe reopening of markets;
- **Demand restart** – restoring governments and passengers’ confidence to resume air travel and stimulate demand with incentives and lower costs.

20. Finally, IATA highlighted that ICAO will have to play a key role leading States to facilitate the restart of operations, in close coordination with the respective health ministries and the World Health Organization.

21. ALTA complemented IATA's message, commenting that it is very important for all to be together on this recovery process, and that it appreciates ICAO's actions and leadership in this regard. Most of the decisions in the NACC countries are now in the hands of the health authorities. It is strongly recommend to the governments to have their health authorities working with their civil aviation authorities, of course following WHO guidelines, to have more coordinated and beneficial results. As a region, it is necessary to work in a coordinated and harmonized way to have an efficient re-opening of the skies. The interaction between the countries present in the videoconference is extremely important for the recovery process. This interaction is key in order to have a solid recovery plan for the industry and restart flying as soon as possible following the health standards globally and for each country. Finally ALTA highlighted its support to the region to help industry to go back on track.

22. ACI-LAC presented the COVID-19 impact in Latin America and the Caribbean, with estimates that the region's airports lost 37 million passengers and stopped entering more than \$700 million during the first quarter of 2020. It also foresees that 2020 will see a decrease of -52% in passenger traffic and -5Bn in revenue. The collapse of air traffic jeopardizes the financial sustainability of the airport industry in the region. In addition, thousands of jobs depend directly and indirectly on this industry.

23. In consideration of the above, ACI-LAC recommended that aid measures be explored to support the airline industry, urging governments to consider the following measures:

- Provide economic, financial and fiscal relief measures to airports and to the aviation industry in general.
- Flexibility in the payment of airport concession fees:
- Reconsider the investment requirements in infrastructure
- Temporary relief of compliance with service quality obligations

24. **Attachment E** provides further details on these measures.

25. CANSO commented though its presentation that Air Navigation Service Providers (ANSPs) across the Latin America and Caribbean are still playing a vital role enabling the transportation of urgent medical supplies and food, and the repatriation of individuals, but clearly traffic numbers are much lower than before the pandemic. The COVID-19 crisis has shown the important role the Air Traffic Management (ATM) industry plays in ensuring safe air transport. Refer to **Attachment F**.

26. ANSPs are committed to deliver the service, and they are also mitigating their financial loses. Contingency planning, business planning and national planning are the three areas ANSPs are working on, among other actions that they are taking. ANSP's revenue is related to the volume of air traffic they control. Therefore, as a result they are extremely vulnerable to the dramatic drop of air traffic currently being experienced across the globe, and it is important to highlight that ANSPs do not perform any type of commercial activities. ANSP cannot layoff their staff, because air space must remain open, even if the operations are reduced. Many are already taking extreme measures to reducing cost, but we cannot reduce cost and jeopardize safety.

27. CANSO finally indicated that in these difficult times, industry collaboration is, should, and will remain the cornerstone for the industries crisis recovery plan.

28. In order to face COVID-19 pandemic, the IADB intends to have a leading role in several fronts, including tax, liquidity, supply chains and obviously health security subjects. Air transport is a key

concept and IADB has a task force dedicated to aviation which objective for the following weeks and months will be, in coordination with countries and organizations, to define priorities, make recommendations to its members, and integrate the sector's needs to the different instruments offered by the bank at this time. IADB stressed the invitation made by ACI-LAC, ECLAC, IATA and ICAO to join them on this effort.

29. IADB also reported on the open announcement for technical assistance resources aimed at joint solutions among countries to face COVID-19, known as Regional Public Goods, with deadline of 15 May 2020 to apply, requiring at least 3 countries with an executor agency of the public sector or non-governmental non-profit organization with headquarters in the region: <https://www.iadb.org/es/sectores/comercio/bienes-publicos-regionales/home>

30. Finally, IADB invited participants to a conference next month where steps for the recovery of the sector will be discussed, as well as new information, seeking to align actions in order to generate a concrete impact. Refer to **Attachment G** for further information.

State/Territory Inputs and Updates Regarding Industry States/Territories Inputs and Updates Regarding ICAO

31. States provided their perspectives regarding COVID-19 and mentioned measures that they have taken, highlighting the importance to join efforts among the governments, industry, providers and all aviation stakeholders, and their commitment. Inputs replied basically to the following questions:

- What do you need from ICAO?
- What are we not doing that we need to be doing?
- What are your State or Territory needs?
- What do you see as the Regional needs?
- What do you need from the industry?
- What are they not doing that they need to be doing
- What are your State or Territory's needs regarding industry?
- What do you see as challenges between industry needs versus State needs?

32. Jamaica commented on the importance of ICAO leadership on this Aviation crisis and welcomed the DG communication and actions being taken to implement a harmonized and inclusive aviation recovery.

33. Netherlands also welcomed ICAO's initiative, and considering their representation in the Caribbean Region with their BES Islands, the recovery actions are urgently needed for regional collaboration and joint work with all aviation stakeholders.

34. France briefed on its current operations in the Caribbean French territories, and expressed its support to the initiative. France also indicated that it would be honoured to receive all the region's civil aviation authorities at the NACC/DCA meeting scheduled for December in Martinique.

35. United States shared their views on the current mitigations done due to the COVID-19 pandemic, the recovery actions that are foreseen to bring the passengers' trust and operators' confidence back to normal. The participation of all key players is critical and ICAO leadership are essential. The support from TSA was identified for this recovery process for the region.

36. The videoconference also included individual exchange of views and questions through the chat. These questions and answers are in **Attachment H**. Likewise, States were also encouraged to send their questions to the ICAO NACC Regional Office to continue the dialogue and support concerning the pandemic. Further questions may be sent to Mr. Julio Siu, Deputy Regional Director (email: jsiu@icao.int) and/or to his Assistant, Ms. Claudia Lopez (email: clopez@icao.int).

Recap and follow-up actions, other business and Closing Remarks

37. ICAO commitment through the Secretary General and the Director of the NACC Regional Office was reiterated in order to continue assistance and support to the necessary measures and actions to mitigate effects of the pandemic, the application of best practices, moving forward towards compliance and keeping and improving safety of the region and the distinct activities for the development of aviation and air transport as a pillar for socio-economic growth of the NACC States and the region. This can be done with the active and harmonised participation of the industry and other key aviation stakeholders, and with ICAO's commitment as global aviation leader and forum in joining the different efforts of aviation stakeholders to develop a recovery plan for aviation/air transport, allowing fast performance in an effective and sustainable manner.

Agreements/Actions

Actions/conclusions on the mitigation of the effects of the pandemic

1. That ICAO Headquarters and ICAO NACC Regional Office continue assisting the States concerning guidance and assistance regarding the application of the guidelines and best practices under the scheme of exchange groups and relevant fora.
2. That ICAO continue providing guidance to the States on operational deviations, standard compliance and other matters related with safety/efficiency under said assistance to States, including sharing individual decisions of States that may affect international operations.
3. That the States, the industry and ICAO continue effective and timely communications to keep everybody updated on the evolution of the pandemic and its effects with a view to a harmonised and timely performance of all and to attaining the more suitable mitigation measures to safeguard health and security of persons and sustainability of the aviation sector.
4. That ICAO available tools and information in its different links be used and extensively applied, as well as that of the industry in order to have timely and current information for decision-making by the States in harmony and to minimize negative effects of the pandemic in the aviation sector.
5. That the States make sure to actively participate with ICAO in coordination and preparation actions for contingencies concerning COVID-19 and the hurricane season.
6. That the States continue their willingness to support humanitarian operations, repatriation flights and provision chains during the crisis (cargo operations, medical ambulance, humanitarian activities, etc.) bearing in mind the realities and challenges of their industry or air transport.

Actions/conclusions on recovery/restart

7. Keep joint work based on the roles and needs of each body and that the key stakeholders of aviation (IATA, CANSO, ACI-LAC, etc.) join the efforts of the States in coordination with ICAO (and vice-versa) for the development of recovery plans and studies taking into account the guidelines provided by ICAO and the considerations of the sector key stakeholders.

8. That alliances be fostered, as well as synergies on the recovery actions of the industry in order to ensure a coordinated, harmonised and sustainable approach.
9. Consolidate a more specific working group for the recovery and that each body/participating State on these actions designate a Focal Point for coordination. This working group should propose a model recovery plan for its prompt discussion/application by States.
10. States take immediate action in order to identify priority needs and the short, mid and long term recovery priority activities.
11. That States consider actions aimed at timely application or engagement with institutions such as IDB or other funding sources that may offer assistance for a prompt recovery of the air transport sector. IDB specific information on available funds as assistance for States may be found at <https://www.iadb.org/en/sector/trade/regional-public-goods/home>
12. That States consider applying simple, transparent, flexible and harmonized measures and recovery plans

Coordination and follow-up actions/conclusions

13. That ICAO continues organizing this States rapprochement approach to address necessary and immediate actions in order to mitigate adverse effects of the pandemic for the air transport sector.
14. The ICAO NACC Regional Office will follow-up to the Secretary General's urge to States to support the initiative of this collaborative and harmonisation approach, seeking to involve higher level authorities of the States such as the Tourism, Transport, Health and other ministries with related aviation impact in order to ensure greatest support from States. These actions should be aimed towards civil aviation institutions and a firm performance and commitment from States in recognising aviation as an essential pillar of the socio-economic development of countries, their tourism and trade. The ICAO NACC Regional Office will follow-up with Directors General and key leaders on this initiative.



North American, Central American and Caribbean Office (NACC)
Oficina para Norteamérica, Centroamérica y Caribe (NACC)

ATTACHMENT A

North American, Central American and Caribbean (NACC) Directors of Civil Aviation COVID-19 Videoconference

Zoom Meeting, 24 April 2020

LIST OF PARTICIPANTS

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1. Kendell O. Richards

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2. Brian Challenger
3. Peter Abraham

ARUBA

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BAHAMAS

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6. Juliea Brathwaite

BARBADOS

7. Donna Cadogan
8. Tracey Forde Bailey
9. Carlisle Simmons
10. Francia Jordan
11. Dionne Gibbs

BELIZE

12. Nigel Carter

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14. Karolyn Darrell-Burgess
15. Tariq Lynch-Wade

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17. Andrew Larsen
18. Frank Neubauer
19. Shannon Wright

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SAINT KITTS AND NEVIS

34. Kaye Bass
35. Royston Griffn
36. Kenrick Duncan

SAINT VINCENT AND THE GRENADINES

37. Andrea Best

SINT MAARTEN

38. Louis Halley

TRINIDAD AND TOBAGO

39. Francis Regis
40. Kingsley Herrera
41. Ricardo Henry

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42. Peter Forbes

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44. Maria Boyle
45. Baker Mark
46. Bryan de Couto

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48. David Burkholder
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ATTACHMENT B

AGENDA

- Introduction by Mr. Melvin Cintron, Regional Director, ICAO NACC Regional Office
- Opening Remarks by Dr. Fang Liu, ICAO Secretary General
- ICAO Presentations by NACC Regional Office, Air Transport Bureau, Chief Aviation Medicine and Air Navigation Bureau – with Interventions from LACAC
- States/Territories Inputs and Updates Regarding ICAO
- Introduction/Intervention of Industry Participants –IATA and ALTA, ACI-LAC, CANSO and IDB
- State/Territory Inputs and Updates Regarding Industry
- Recap and follow-up actions, other business and Closing Remarks

Objective:

Inform on ICAO's position, available guidance and other matters such as:

1. COVID-19 situation in the NAM/CAR Regions;
2. Granting of exemptions and extensions;
3. Latest economic impact data;
4. Conversion of aircraft passenger to cargo or mixed configuration;
5. Operational and travel restrictions;
6. Upcoming Hurricane Season and other contingency needs;
7. Economic assistance available to our States (Regional Public Goods);
8. Recovery plans (short, medium and long term) – ICAO Concept draft working paper;
9. States inputs and updates
 - a. What do you need from ICAO?
 - b. What are we not doing that we need to be doing?
 - c. What are your State or Territory needs?
 - d. What do you see as our Regional needs?
10. ICAO NACC Regional Office proposes a Director General/Ministerial meeting in support of Civil Aviation Authorities and State Air Transport System;
11. ICAO NACC Regional Office actions in support of States and Territories

ATTACHMENT C
SUMMARY OF ATB PRESENTATION, ECONOMIC IMPACT OF COVID-19

Air transport has been vulnerable to several political, economic and social impacts, as well as epidemiological outbreaks over the past decades. The impact of COVID-19 has already surpassed the 2003 SARS outbreak, which resulted in the reduction of annual RPKs by 8% and USD 6 billion revenues for Asia/Pacific airlines. The 6-month recovery path of SARS might not apply to today's situation.

Air cargo throughput has decreased a total of 19 per cent in March 2020 due to the withdrawal of passenger aircraft belly capacity while cargo freighters have provided additional, offsetting capacity. Preliminary analysis indicates air cargo revenues have dropped 22 per cent from USD 8.3 to 6.5 billion in March 2020 over the same period.

The world Tourism Organization (UNWTO) has estimated a loss of USD 300 to 450 billion in international tourism receipts for 2020.

Three scenarios are shown below to measure the possible impact of COVID-19 outbreak on scheduled international passenger traffic worldwide for the first half of the year 2020 (1Q and 2Q 2020):

- Baseline: hypothetical situation without COVID-19 outbreak, i.e. originally-planned
- Scenario 1: V-shaped path, quick recovery from May 2020
- Scenario 2: U-shaped path, prolonged contraction to June 2020

Given a rapidly changing environment, Scenarios 1 and 2 are merely indicative of two possible paths out of many. The exact path will depend upon various factors: inter alia, duration and magnitude of the outbreak and containment measures, availability of government assistance, consumers' confidence, and economic conditions. Scenarios 1 and 2 are differentiated in terms of supply (output) and demand (spending) conditions, mainly, a) the timing and scale of airline capacity decline and recovery, and b) the degree of consumers' confidence for air travel that can be translated into demand or load factor.

Each scenario has sub scenarios that can be described as follows:

Scenario 1 (V-shaped path, a first sign of recovery in late May)

- Path 1: Smooth capacity recovery to 75% of Baseline level by September but weak demand return
- Path 1a: Strong capacity rebound to 90% in tandem with quick demand return
- Path 1b: Slow progression to recover 50% capacity by September with downside risk in demand

Scenario 2 (U-shaped path, restart in 3Q or later)

- Path 2: Slow progression of capacity recovery to 40% of Baseline with sluggish demand growth
- Path 2a: Strong capacity rebound to 70% by September, outpacing demand recovery
- Path 2b: Prolonged downturn towards September or later with marginal summer adjustments

The latest estimates indicate that the possible COVID-19 impact on scheduled international passenger traffic for the first 9 months of 2020, compared to Baseline (business as usual, originally-planned), would be:

- V-shaped path (a first sign of recovery in late May)
- Overall reduction ranging from 41% to 56% of seats offered by airlines
- Overall reduction of 705 to 963 million passengers
- Approx. USD 160 to 218 billion potential loss of gross operating revenues of airlines

- U-shaped path (restart in third quarter or later)
- Overall reduction ranging from 57% to 67% of seats offered by airlines
- Overall reduction of 961 to 1,117 million passengers
- Approx. USD 218 to 253 billion potential loss of gross operating revenues of airlines

The impacts depend on the duration and magnitude of the outbreak and containment measures, the degree of consumer confidence for air travel, and economic conditions among others.

Finally, the analysis is updated on a daily basis and can be looked at under:

<https://www.icao.int/sustainability/Pages/Economic-Impacts-of-COVID-19.aspx>

Attachment D

Working Document on a post-COVID-19 recovery path

I. Setting the Scene

The aviation industry bears the weight of the consequences of the COVID-19 outbreak heavier than other industries as its *raison d'être* is the transport of people and goods all across the globe for travel, tourism, business and trade. The drastic reduction in air traffic demand amplified by travel restrictions have resulted in significant negative impacts, including severe revenue and cash flow pressure on all stakeholders, including but not limited to airlines, airports, air navigation service providers and aircraft manufacturers.

Since the initial news of the outbreak, the air transport industry has been in a steep stall and the horizon is currently difficult to identify. Unlike previous pandemic outbreaks, such as SARS or the MERS flu, whose recovery took approximately 6 months with a sharp V-shape scenario, the COVID-19 recovery scenario may extend beyond this time horizon due to the inherent economic recession.

Stakeholders from the aviation industry as well as from other industries, such as travel and tourism, have jointly recognized the unprecedented nature of the COVID-19 crisis in the world, the significant economic impact on air transport and civil aviation at large, the challenging financial situation of the aviation industry and the uncertainty faced by stakeholders at all levels. They have come together in these times to share their knowledge and expertise and to coordinate actions empowering the aviation industry to survive and to continue playing its instrumental role as a worldwide enabler in times of crisis.

With regards to the urgency of the moment, the aviation stakeholders jointly with other UN agencies and international organizations have resolved to design and develop recovery mechanisms and action plans towards stabilization and expedited recovery from these economic hardships.

Recognizing the major threats faced by the aviation industry in light of the economic impacts of COVID-19, this document proposes possible recovery guidance (short, medium and long-term) with respective influencing factors and foreseeable challenges associated. In this regard, each State should play a primary role in the recovery of its own air transport through the implementation of globally-harmonized, efficient public policies and strategies while ensuring that any regulatory actions and measures should not negatively impact the growth of international air transport.

Analysis of the economic impact of COVID-19 on civil aviation

Initial impacts of COVID-19 were limited to certain outbreak countries from late January to February 2020. Since March, as the outbreak continues to expand affecting countries and people all over the world, governments have closed borders and imposed more stringent travel restrictions as one of the containment measures. This has driven drastic flight cancellations by

airlines and dramatic declines in air travel demand, creating severe revenue stream and cash flow pressure on all stakeholders in the aviation sector.

ICAO monitors the extent of the economic impacts of COVID-19 on civil aviation and keeps updating its analysis on a regular basis. Due to the spread of COVID-19 globally and severity of travel restrictions, the updated estimates indicate the COVID-19 impact on scheduled international passenger traffic during first half 2020, compared to originally-planned by airlines:

- Overall reduction of 37% to 48% of seats offered by airlines
- Overall reduction of 411 to 535 million passengers
- Approx. USD 90 to 118 billion potential loss of gross operating revenues of airlines.

Biggest overall impact is expected in Europe and Asia/Pacific, followed by North America and Middle East. At the State level, for example, airlines would lose a total of USD 19.4 to 22.5 billion gross operating passenger revenues from international operations from/to China for the same period.

These estimates were based on the scenarios of V-shaped path (recovery from late May) and U-shaped path (continuous stagnation till the end of 2nd quarter), which are differentiated in terms of supply (output) and demand (spending) conditions, mainly, a) the timing and scale of airline capacity decline and recovery, and b) the degree of consumers' confidence for air travel that can be translated into demand or load factor. Given a rapidly changing environment, these scenarios are indicative of two possible paths out of many. The exact path will depend upon various factors, inter alia, duration and magnitude of the outbreak and containment measures, availability of government assistance, consumers' confidence, and economic conditions.

II. Challenges faced by the aviation industry amid the COVID-19 crisis

The effects of the spread of the disease are directly felt by the air transport industry as a whole. Operating in such a highly interconnected and complex industry, stakeholders depend upon each other mutually and to a high extent, and in consequence they suffer the impacts jointly.

a. Consequences of decrease in demand and supply

Widespread shutdowns, heavy travel restrictions, consumer's unwillingness to travel are among many factors affecting the aviation industry by significantly decreasing the passenger's demand and consequentially the supply as well. The recovery of consumers' confidence in travel may require a substantial period.

Due to this sharp decrease in passenger demand amplified by the growing number of travel restrictions, airlines have been forced into the significant number of **grounding their fleet**. The extensive groundings of fleet require immense aircraft storage facilities or parking space, creating also an additional cost burden for airlines. Furthermore, grounding aircraft for a certain period of time could lead to huge maintenance costs to airlines for the aircraft to resume normal flights.

b. Liquidity and cashflow

The severe decline in traffic creates immanent financial threats to the aviation industry globally. Airlines, for example, are facing **severe financial stress**, which in some cases may **lead to bankruptcies**. While so far only a handful of airlines have filed bankruptcy protection in relation to COVID-19, it is estimated that airlines' cash reserves, without external financial aid, will dry out in a short period of time, which will in return impact other stakeholders dependent on these cashflows.

Airports and Air Navigation Service Providers (ANSPs) are also being hit on cash flow, as their income of revenue is directly linked to the volume of air traffic. As revenues plummet rapidly, many airports and ANSPs are already deploying cost containment measures wherever possible to preserve financial stability and increasing number of them will inevitably face issues with the continuously evolving situation.

For the same reasons, other stakeholders in the aviation, trade, travel and tourism industry find themselves in difficult financial and operational times as well. From ground handlers, catering companies, aircraft manufacturers to travel agents, airport retailers and others, this unprecedented crisis causes existential problems for all sectors supported by aviation directly and indirectly.

In this regard, governments are called upon to support the industry through **loans and loan guarantees, direct capital injection; and tax alleviation** including relief on fuel, payroll, income, ticket taxes and other levies. Several States have already devised assistance plans consisting in, inter alia, a) stopping the collection of taxes on domestic airlines; b) direct financial aid to airlines; and c) other governmental support. Other States have also indicated considering deeper measures of support such as nationalization of their air carriers.

c. Employment

Closely linked to all factors related to the impacts of COVID-19 is also the **forced reduction of workforce** by airline companies, ground handlers, airport operators, travel agents and many others. Airlines have announced temporary furlough measures of a high percentage of pilots, crews, maintenance teams as well as managers.

d. Airport slots

A strong case had been articulated by the airline industry to exempt carriers from having to comply with the so-called "**grandfather rights**" rule, by which airlines need to utilize their assigned slots at an airport to at least 80 per cent or they may lose this slot in the future. Recently, many regulators, including ones in the United States and the European Union (EU), have temporarily suspended this requirement to protect the financial health of air carriers and mitigate negative environmental impacts of flights operated only for the purpose of maintaining airport slots.

e. Travel and trade restrictions

Travel restrictions have become the reality of the air transport industry as States seek to protect their citizens and national interests amid the COVID-19 pandemic. The situation is changing regularly in light of different approaches adopted to contain the spread. Approximately 143 States have reported to have a certain degree of travel restrictions from quarantine requirements and partial travel bans to border closures.

These travel policies also result in removing significant **cargo capacity** provided via the bellies of passenger aircraft from the system, which is vital to keep supply chains functional, including deliveries of humanitarian aid and equipment. Actions have been called for to: a) clarify or amend travel policies to exempt air cargo; b) exempt specific crews from quarantine requirements; and c) grant temporary traffic rights to ensure efficient cargo operations in support of the global supply chain.

III. Issues likely to be encountered on the recovery path

Growth and recovery prospects are still very uncertain. The downside risks, if materialized, will significantly reduce the chances and means for recovery. In the short-term, the major downside risk is the impacts and consequences of COVID-19 proving more intensive and lengthier than assumed in the projections.

The underlying global integration of the aviation industry, the inter-dependence of the global economy and the customer/leisure culture are elements likely to help the recovery of the aviation industry. The below-outlined recovery scenarios are high-level and subject to many changes. The base assumption is that for any recovery path of aviation to be laid out the health-crisis need to be mitigated and to a significant extent resolved.

FACTORS (Assumptions)	Short-term “Swift” Recovery (3-6 Months)	Medium-term “Progressive” Recovery (6 - 12 Months)	Long-term “Slow” Recovery (1-2 Years)
Travel Restrictions	Complete lift of travel restrictions when permissible	Progressive alleviation of travel restrictions - probable scenario will involve lifting restrictions on a domestic/regional level, followed later by international traffic	Heavy restrictions on international travel in place for an extended period of time; Majority of travel is domestic /regional.
General Economic Conditions	Economic activity gradually resuming and recovering to pre-crisis level	Partial economic damage; slow improvement in business activities and consumer spending	Global economic recession; widespread of weakness in economic sectors with severe budget cuts and reducing workforce

FACTORS (Assumptions)	Short-term "Swift" Recovery (3-6 Months)	Medium-term "Progressive" Recovery (6 - 12 Months)	Long-term "Slow" Recovery (1-2 Years)
Airlines Capabilities	Operational Capabilities not affected (fleet, etc.); Workforce is available for hire-back; Free-interest loans and Government cash injection used to maintain current capabilities;	Capabilities are slightly affected; most airlines are still operative; Airlines significantly downsize operations to limit risks and focus more on domestic flights; Cash injections/bank loans are necessary to maintain the minimum level of capabilities;	Capabilities are significantly affected pushing several airlines into default and/or bankruptcy; Airlines downsize operations drastically (very limited passenger international travel)
Air Travel Demand	Passenger demand resumes with low interruption resulting in low prices	Travel demand is decreased, but lower offer (due to decreased operational capabilities) may lead to increased prices;	Reduced and limited operations result in higher prices, which do not stimulate demand
Aviation Industry Health	Fast recovery of the industry	Aviation industry is significantly affected with less traffic generating less revenue and leading to less employment supports	High impact with significantly reduced operations, reduced number of players on the market, high unemployment
Foreseeable Challenges per Scenario			
Financial Capability	Decreased Financial Capability;	Significantly reduced financial Capability	The financial capabilities of air transport stakeholders will be critical which may lead to a shift in the model of commercial aviation as we know it today (extensive nationalizations and State subsidies, disappearance of premium travel, shift from hub-and-spoke scheme to a point-to-point scenario)
Employment	Hiring freezes for 1 year, limited expansion on human	Medium to high levels of unemployment in the industry due to forced	Extensive unemployment in the industry resulting in shortages of pilots,

FACTORS (Assumptions)	Short-term “Swift” Recovery (3-6 Months)	Medium-term “Progressive” Recovery (6 - 12 Months)	Long-term “Slow” Recovery (1-2 Years)
	capital	permanent reduction in workforce and/or unwillingness of employees to return due to uncertainty or less attractive conditions	crews, ground handlers, controllers, etc.
Investments	No additional investment or expansion in projects and/or commercial offerings	Cutbacks on investments on existing projects and current activities (reduced routes, fleet, etc.)	Significant lack of investment, priority focused on safety and security, all other investments deemed non-essential and therefore not supported
Trade and tourism	Trade and tourism can be expected to recover by Q4	Extensive financial aid from States will be required to support the recovery and promotion of tourism	The recovery of trade and tourism will largely depend on States, support not limited to financial aid
Air Cargo	The sudden removal of belly capacity has disrupted air cargo flows, but the sector is quickly adjusting and might soon return to levels just above pre-COVID19 situation with slightly enhanced demand for cargo deliveries	A presumably stable element in the recovery scenarios, air cargo will play a significant role in supporting the recovery of the global supply chain and the economy; Conditioned by the facilitation and flexibility of rules;	Air cargo will be a major player in the global economy's recovery in the long-term .
Industry Standards and Procedures	Little to no additional procedures in the industry – e.g. unaltered passenger's experience	Establishment of temporary to mid-term industry procedures -e.g. health-screening at airports, distancing in aircraft, etc.	Establishment of permanent industry procedures for the prevention of similar crises in the future – specific crew trainings, cargo standards, etc.
Consumer Confidence	Consumer confidence will be restored through effective marketing campaigns and stimulating offers	Passenger Confidence will be impacted by prolonged periods of uncertainty and anxiety as well as a general distrust towards international travelling.	Passenger Confidence will be at very low levels with passengers preferring regional travels or choosing other means of transport.

IV. Key concepts for the preparation and implementation of recovery measures

a. Recovery mechanisms: States' responsibilities

Each State has the primary responsibility for its own aviation development and recovery; and the role of national-level recovery mechanisms and action plans cannot be overemphasized. Taking into consideration the direct and indirect economic benefits generated by civil aviation to their national economies, States need to develop recovery mechanisms and action plans, as a matter of urgency and in close cooperation with other transport authorities and ministries in charge of related portfolios, to establish a path towards stabilization and expedited recovery.

b. Observation of established principles: cross-industry collaboration

In developing and implementing recovery mechanisms and action plans, there should be an appropriate balance between the respective interests of service providers (airports and ANSPs) on one hand and of users (airlines) and end-user on the other. ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082) state that:

"The financial situation of airports and of ANSPs, as well as of their primary users, fluctuates with the performance of global, national and regional economies. Airports and ANSPs have a high proportion of fixed costs, mainly funded by traffic, and therefore in times of decreased demand are challenged to maintain high standards of safety, security and quality of service. Aircraft operators seek to reduce the charges they pay. It is recognized that it is difficult to reconcile the long-term planning horizon of airports and ANSPs with the shorter-term requirements of aircraft operators. Therefore, a mutual understanding between providers and users is important in addressing these challenges."

A majority of airports and ANSPs are not privatized and are operated by government owned entities, and the cost of providing the services and infrastructure are mainly funded by user charges (as well as non-aeronautical revenues in case of airport). ICAO's Policies on (Doc 9082) emphasize the four key charging principles, i.e. non-discrimination, cost relatedness, transparency and consultation with users. Recognizing that airlines face restrictions with regard to their choice of particular airports and of routes to be flown, caution should be exercised when attempting to compensate for shortfalls in revenue and that account be taken of the effects of increased charges on aircraft operators and end-users.

c. Observation of principles: governmental and institutional support

There may be some instances where State assistance can produce economic and social benefits in terms of restructuring of air carriers and assurance of services. Even in such special cases, however, States should take transparent and effective measures accompanied by clear criteria and methodology to ensure that aids/subsidies do not adversely impact on competition in marketplace (Recommendation of the fifth Worldwide Air Transport Conference refers).

In addition, aviation was estimated to generate USD 136 billion in tax revenues in 2018, which is equivalent to 45 per cent of the industry's GVA (firm-level equivalent to GDP), paid to local, provincial and national authorities through passenger duties, domestic value-added tax, customs and immigration levies, etc. It is recommended that the priority of allocation of the tax revenues generated through aviation should be given to aviation itself.

States, international institutions and donors such as international financial institutions, each with its own comparative advantages, should examine the best means of supporting sectoral stakeholders, without prejudice to fair competition and by ensuring transparency. Depending on their individual circumstances and subject to the basic principle of transparency and non-discrimination, the economic stimulus (i.e. indirect assistance) provided by the States could be a basket of measures, ranging from tax breaks, reducing borrowing costs, deferring repayment tenures of borrowings, the provision of grants to other fiscal privileges.

In summary, State assistance for airlines, airports and ANSPs should be one comprehensive package by: a) striking an appropriate balance between the respective interests of service providers (airports and ANSPs) on one hand and of users (airlines) and end-user on the other; b) paying special attention to the difference in ownership structure between airlines (vast majority private), airports (majority government-owned but commercialized) and ANSPs (government-owned or part of it except a few and purely cost-recovery); c) taking transparent and non-discriminatory measures to ensure any assistance measures do not adversely impact on competition in marketplace; and d) applying the principle of proportionality in the scale of assistance, i.e. proportional to the economic benefits generated to their national economies.

d. Additional consideration on the emergence of innovation as a response to the COVID-19 crisis

The current crisis has created unprecedented economic impacts in the aviation industry and may have highlighted the shortfalls of air transport as we know it – low operating margins of air carriers, reliance on premium revenues from business passengers, excessive inter-dependencies among various players in the supply chain, etc. The path to recovery of the air transport may therefore call for unprecedented measures as well by leveraging innovative solutions and their adoption by governments. We can expect a catalyzed growth in e-commerce and same-day deliveries, more resilient, distributed and trackable supply chain through the Internet of Things (IoT) and blockchain, a shift in business models towards collaborative economies, a rise in autonomous low-capacity/private aircraft among others.

ATTACHMENT E
ACI-LAC
COVID-19 IMPACT ON AIRPORTS IN
LATIN AMERICA AND CARIBBEAN

Daily data collected by ACI-LAC shows that 2020 started with a 3% growth in passenger traffic (January and February). With the progressive imposition of quarantines at world level, as of March 1, traffic began to fall steadily and in the last week of March, passenger traffic in the vast majority of airports was practically non-existent, with a general drop 97%. However, most airports remain open to service air cargo and humanitarian flights. ACI estimates that the region's airports lost 37 million passengers and stopped entering more than \$ 700 million during the first quarter of 2020. We estimate 2020 to see a decrease of -52% in passenger traffic and -5Bn in revenues.

The collapse of air traffic jeopardizes the financial sustainability of the airport industry in the region. In addition, thousands of jobs depend directly and indirectly on this industry. According to Air Transport Group data, 430,000 people work at airports in Latin America and the Caribbean.

In consideration of the above, ACI-LAC recommends that aid measures be explored to support the airline industry as one of the main generators of economic and social value in the region and throughout the world. In particular, we urge regional governments to consider the following measures:

1. Provide economic, financial and fiscal relief measures to airports and to the aviation industry in general. We urge governments to consider immediate economic, financial and fiscal relief measures to support the industry at this critical time and help it recover and develop.
2. Flexibility in the payment of airport concession fees: regional governments are urged to relax the conditions of concession payments. This may include: exemptions; delayed payments; or even the extension of the terms of the concessions to allow lost traffic to be recovered.
3. Reconsider the investment requirements in infrastructure: particularly those development obligations that are not immediately required by the industry.
4. Temporary relief of compliance with service quality obligations.

ACI-LAC is actively working with other organizations to develop protocols and practical measures to restore air transport in the region as soon as possible and in a coordinated manner.

ACI-LAC makes itself available to governments and other interested parties to evaluate and coordinate actions to protect the well-being of the population and support the economic and social sustainability of our nations.

Attachment F
CANSO Intervention

There are many actors in the aviation supply chain all of which are significant impacted, whether is air navigation services organisations, ANSPs, technology providers, airports, airlines, and ground handlers.

We are aware air traffic has decreased. Nonetheless, air navigation service providers (ANSPs) across the Latin America and Caribbean region are still playing a vital role enabling the transportation of urgent medical supplies and food, and the repatriation of individuals, and this pandemic has shown the important role the ATM industry plays in ensuring safe air transport.

While global flight totals have seen significant drops in daily averages, the data also shows that a significant number of global traffic remains. On 7 April 2020, for example, approximately 22,000 aircraft flew nearly 71,000 flight hours.

ANSPs are committed to deliver the service, and they are also mitigating their financial loses. So there are three things ANSPs are working on, among other actions they are taking.

Contingency planning and Business planning are involved in national planning.

CANSO organised webinars to exchange best practices at a global and region level, interchanged information about new procedures, and working to developing recuperation models to support CANSO ANSP members. We asked the meeting to evaluate and approve any other initiative demonstrating positive benefit for the reactivation or commercial traffic services.

The ANSP revenue is related to the volume of air traffic they control, so as a result they are extremely vulnerable to the dramatic drop of air traffic currently being experience across the globe. Many are already taking extreme measures to reducing cost, but we cannot reduce cost and jeopardize safety.

Therefore to ensure stability and demonstrate resiliency, aviation industry unity is important, the only way we are going to navigate through this crisis is if we all work together to make sure aviation remains the safes and most efficient mode of transport. That is also going to show the flying public we are together; we work to protect them, and we can guarantee we are still the safest way to travel.

How long it would take, many theories, what is clear is that is going to be a slower return, all we need to do is to be ready when it happens.

These are difficult times and industry collaboration is, should and will remain the cornerstone for the industries crisis recovery plan.

ATTACHMENT G IDB INTERVENTION

We are going through a critical moment in the sector, and the joint effort of governments, companies and organizations is going to be key. -As the Secretary General said, this crisis is beyond the control of only one country, but it will require coordinated action and strong collaboration-

In the Inter-American Bank, we have been working in air transport with much more intensity in recent years, through our different instruments, including financing to governments, financing to private, institutional and regulatory reform programs, and also through applied research that generates evidence for the decisions of policies that our member countries face. As we recently worked with ICAO in an investigation into the impact of air agreements between countries.

COVID

- Beyond air transport, in the broader context of response to COVID, the IDB has sought to play a leading role on several fronts, including fiscal, liquidity, supply chain issues, and obviously health and safety issues.

Air transport is a key component, we have a strong task specifically looking at aviation and our goal in the coming weeks and months will be, together with the countries and organizations, to define priorities, recommendations to our members and integrate the needs of the sector to the different instruments that the Bank is offering at that time. We are talking to governments, licensees and organizations to get an overview especially on recovery. We reinforce the invitation to LACAC, ICAO, IATA, ACI-LAC to join us in that effort.

The IDB is also holding an open call for technical assistance resources to be used for joint solutions among the countries to face COVID-19, known as Regional Public Goods. The call is open until 15 May 2020 for application and requires the participation of at least 3 countries with an executing agency from the public sector or non-governmental/non-profit organization based in the region. If you need more information or our support to design a proposal, we are available for consultation: <https://www.iadb.org/es/sectores/comercio/bienes-publicos-regionales/home>

NEXT STEPS

- I also want to highlight that, in the next month, we have already planned a conference like that one where we will focus on discussing the steps for the recovery of the sector. Every day we have new information and we learn more about this crisis and we are refining the lines of action, so it is important to listen to everyone and align actions to generate concrete impact in the sector. Once again thank you very much for the invitation and opportunity and I hope we continue with the open channel for working together.

Attachment H Questions and Answers Session

Can we have the clean aircraft and clean airport guidance circulated to the DG's?

ICAO Response: We are still working on the document with ICCAIA and ACI for the Clean A/c and clean A/P concept. We will distribute as soon as the document is ready.

The tests applied in Dubai during the recent days, are approved by WHO? Any chance to have a list of approved tests?

ICAO Response:

- The only test currently recommended by WHO is a laboratory test, which is a molecular PCR test, which uses a swab with the results taking at least 24-48 hours
- Other tests that tests for antigens or antibodies are currently not approved by WHO as it is not considered to be reliable as yet – this includes the testing that was done in Dubai
- The position regarding testing might change as more tests are done, reliability is proved and tests are recommended by WHO

Can TCB send to all states the listing of equipment available for sale.

ICAO Response: ICAO will send the list shortly of all available equipment where Long Term Agreements are already in place. Furthermore a survey on State needs for procurement for this Pandemic and other related information will be shared with all States to support this supply.

Currently, our Air Traffic Services at Point A are suspended at nights, 11pm to 7am...we continue to provide Air Traffic Services at Point B on a 24hr basis. I am thinking if we can also suspend Air Traffic Services at Point B as well for the same time period as Point A, i.e. 11pm to 7am. I am contemplating this in the context increased measures/restrictions being implemented by the Government. Is there some ICAO requirement that would 'prevent' this or is there a Standard that we would be breaching?

ICAO Response: The only requirement may come from your State regulation, aeronautical information publication and agreed air navigation plan. In any case, contingency measures allow the temporary deviation of such requirements. Several States and Territories of our Region have limited the availability of ATS services, as a measure to make a more efficient use of personnel, reduce the risk of contagion, etc. State CAA should take into consideration that suspension of ATS to both places would leave a complete FIR without en-route alternate for a significant period of time. Consultation with user airlines (IATA) would be a good approach to ensure safety of operations.

- END -