



| ICAO

ECONOMIC DEVELOPMENT

NO COUNTRY LEFT BEHIND



6th Meeting of Directors General of Civil Aviation

Brazzaville, Congo

2 to 4 November 2016





Chicago Convention

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;



Economic Development of Air Transport

Foster the development of a sound and economically-viable civil aviation system.

This Strategic Objective reflects the need for ICAO's leadership in harmonizing the air transport framework focused on economic policies and supporting activities.

Développement économique du transport aérien :

Renforcer le développement d'un système sûr et économiquement viable d'aviation civile.

Cet Objectif stratégique reflète la nécessité du rôle de chef de file de l'OACI pour ce qui est d'harmoniser le cadre de transport aérien en ce qui concerne les politiques économiques et les activités de soutien.



Economic Development of Air Transport A39 Resolutions

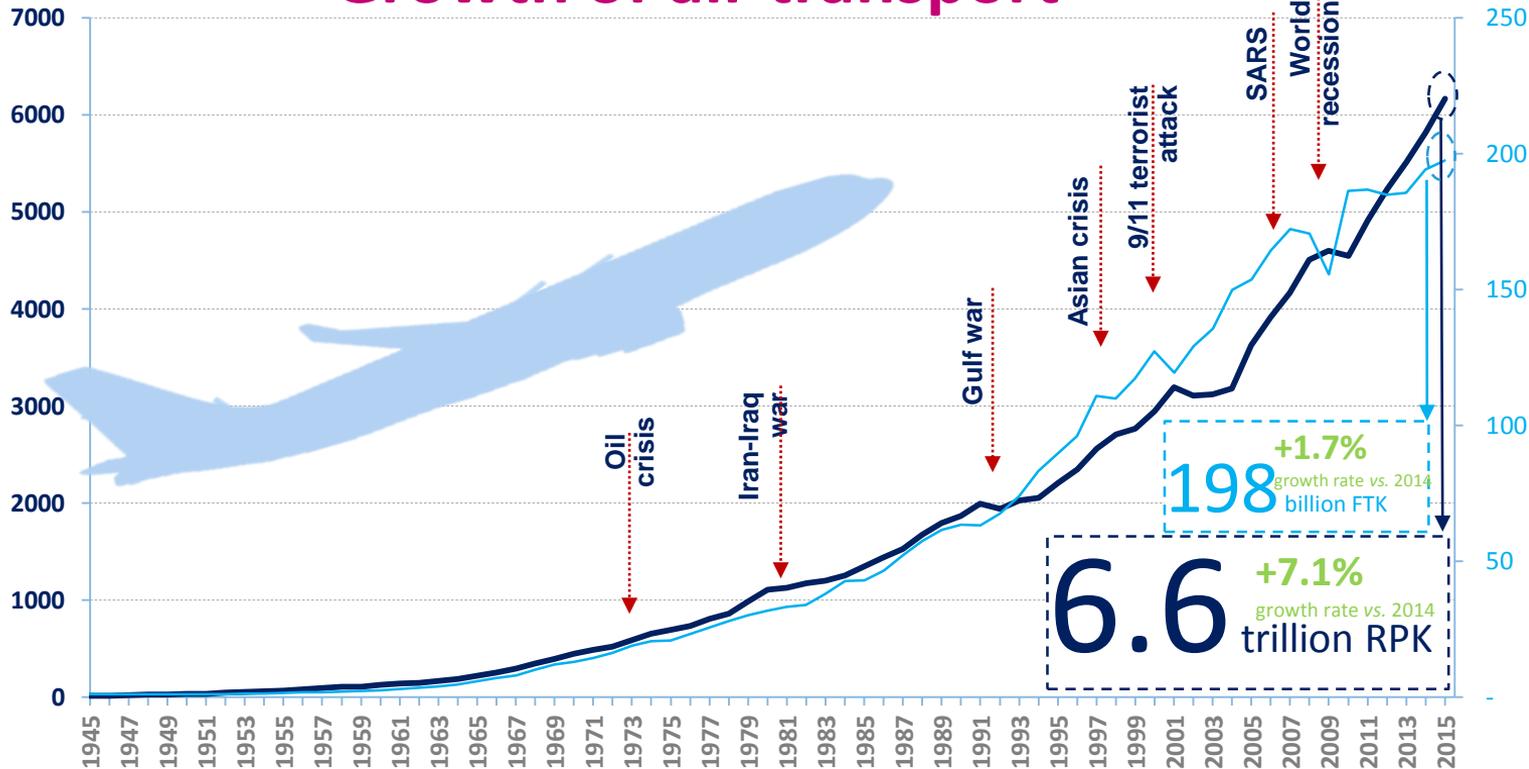
A39-15 Consolidated statement of continuing ICAO policies in the air transport field

A39-15 Exposé récapitulatif de la politique permanente dans le domaine du transport aérien



Growth of air transport

Revenue Passenger-Kilometres
(billion)



Freight Tonne-Kilometres
(billion)

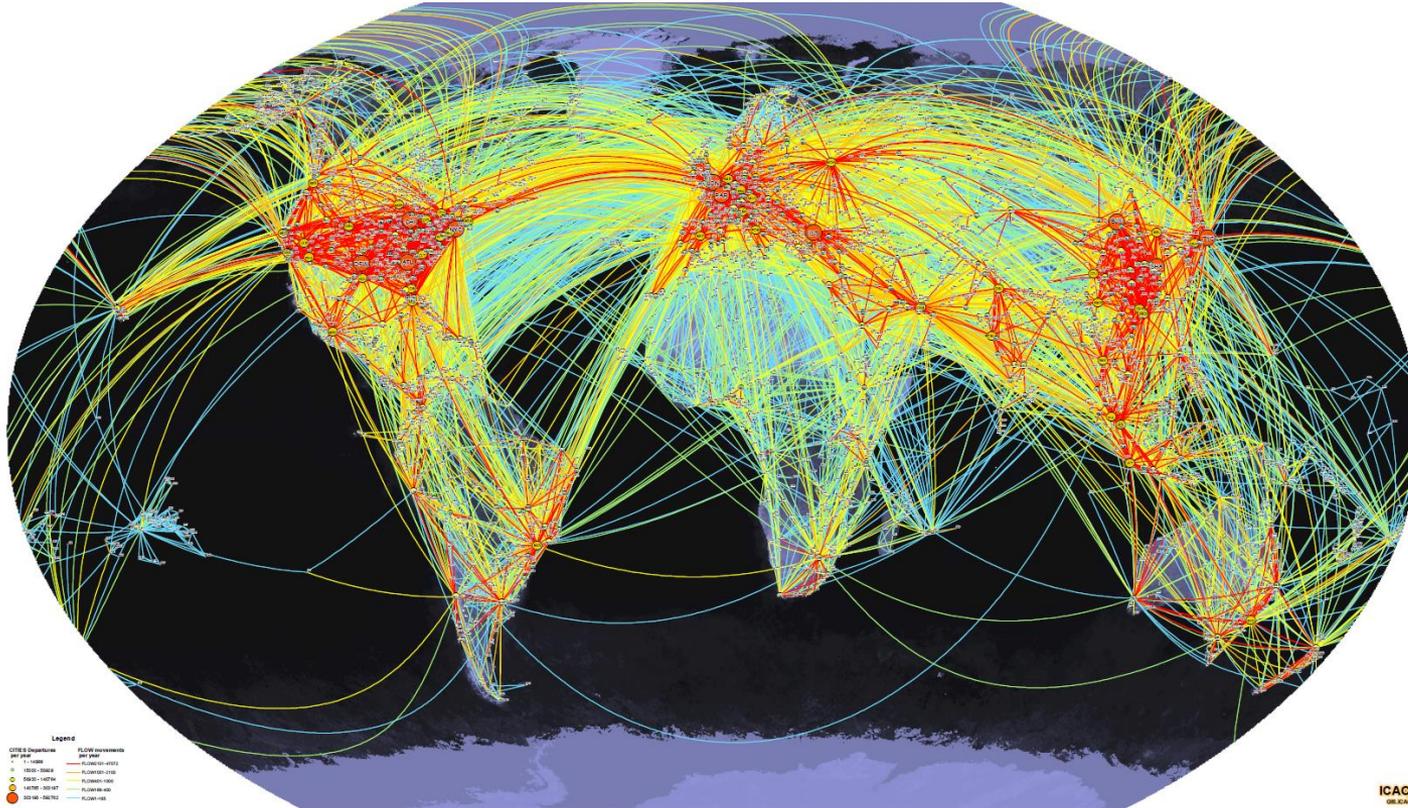


- ✈ **40 million flights**
- ✈ **3.5 billion passengers**
- ✈ **51 million tonnes of freight**
- ✈ **Over 1 400 scheduled airlines**
- ✈ **More than 27 000 aircraft**
- ✈ **More than 4 130 airports**
- ✈ **173 air navigation centres**

Traffic is for scheduled services

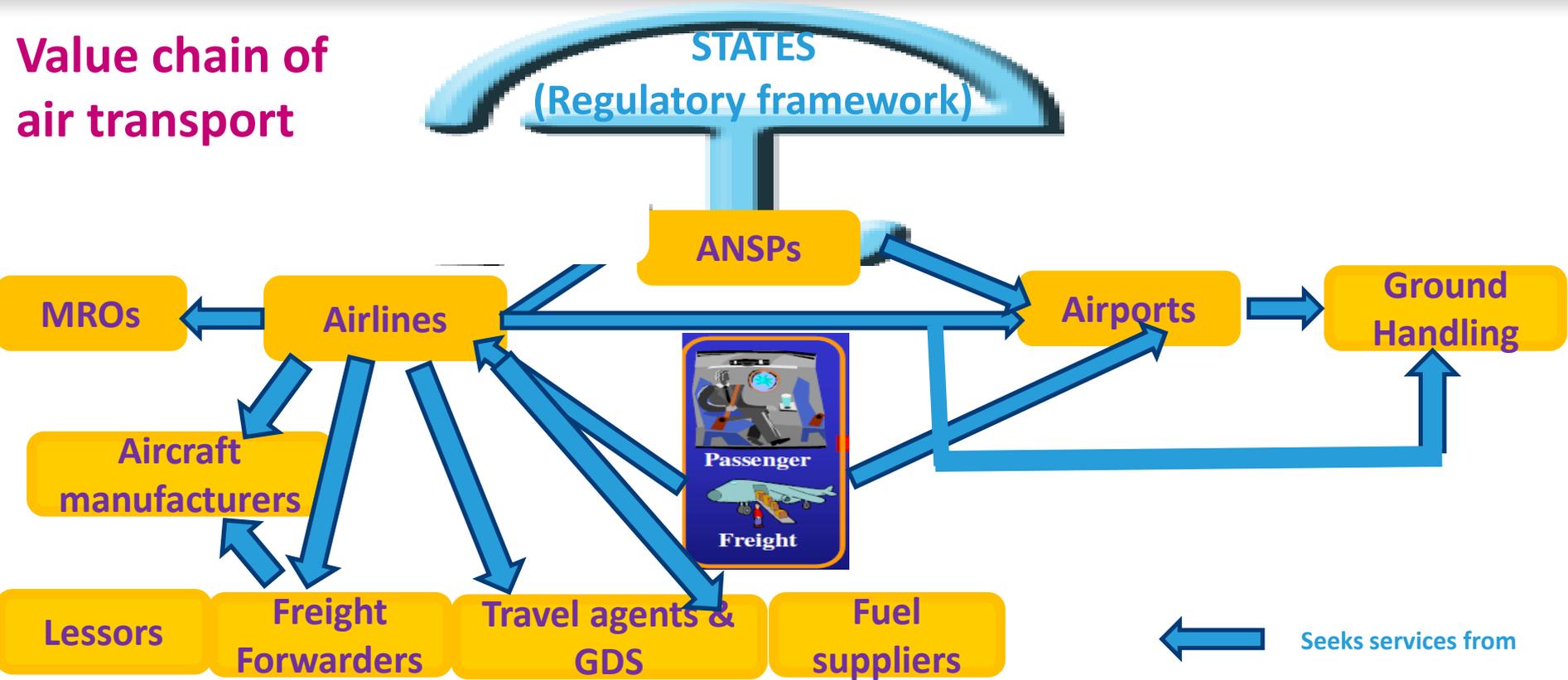


Air route network 2015





Value chain of air transport



ICAO and the United Nations Sustainable Development Goals (SDGs)

Read more at: <http://www.icao.int/about-icao/aviation-development/Pages/SDG.aspx>

ICAO STRATEGIC OBJECTIVES

SAFETY

CAP/EFF

SEC/FAL

ECON
DEV

ENV

Goal	Goal Description	SAFETY	CAP/EFF	SEC/FAL	ECON DEV	ENV
Goal 1	End poverty in all its forms everywhere				●	
Goal 2	End hunger, achieve food security and improved nutrition and promote sustainable agriculture					
Goal 3	Ensure healthy lives and promote well-being for all at all ages	●		●	●	●
Goal 4	Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all	●	●	●	●	●
Goal 5	Achieve gender equality and empower all women and girls	●	●	●	●	●
Goal 6	Ensure availability and sustainable management of water and sanitation for all					
Goal 7	Ensure access to affordable, reliable, sustainable and modern energy for all					●
Goal 8	Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all			●	●	
Goal 9	Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation	●	●		●	●
Goal 10	Reduce inequality within and among countries	●	●	●	●	●
Goal 11	Make cities and human settlements inclusive, safe, resilient and sustainable					
Goal 12	Ensure sustainable consumption and production patterns				●	●
Goal 13	Take urgent action to combat climate change and its impacts		●		●	●
Goal 14	Conserve and sustainably use the oceans, seas and marine resources for sustainable development					
Goal 15	Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss			●		●
Goal 16	Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels			●		
Goal 17	Strengthen the means of implementation and revitalize the global partnership for sustainable development	●	●	●	●	●



Economic benefits of aviation in 2015

Direct economic contribution
of the aviation sector

10.0 million

***Direct jobs** supported by aviation worldwide*

\$718 billion

Direct** Global **economic impact

Direct, indirect, induced and
tourism economic contribution of
the aviation sector

63.5 million

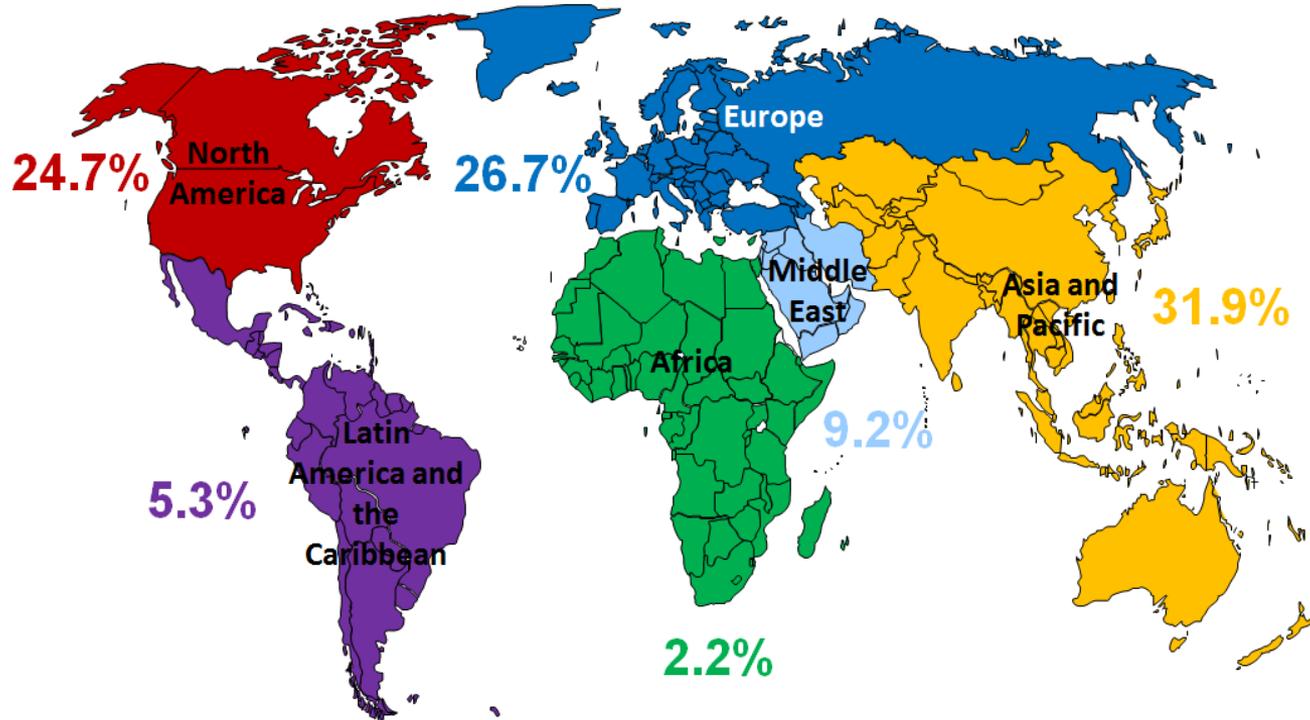
***Jobs** supported by aviation worldwide*

\$2.7 trillion

*Global **economic impact***

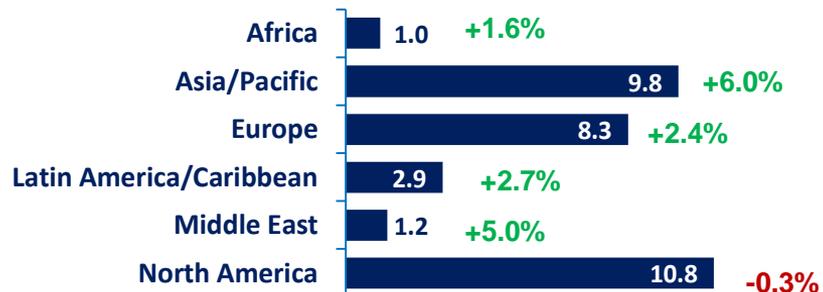


Share of Revenue Passenger-Kilometres by region in 2015

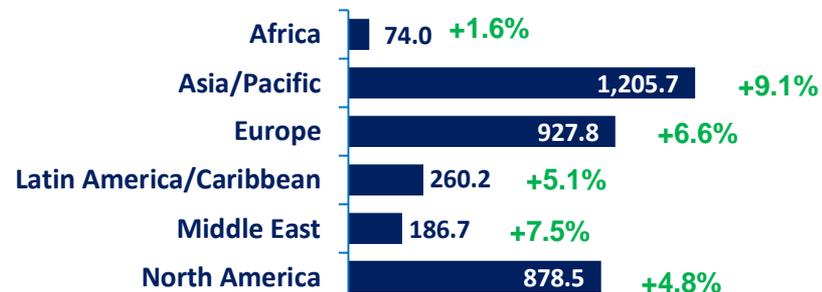




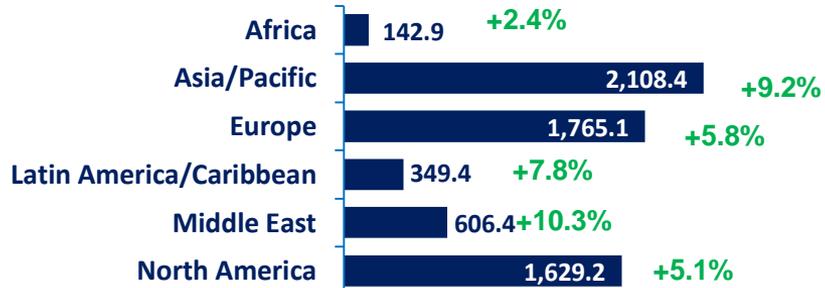
Aircraft departures (million)



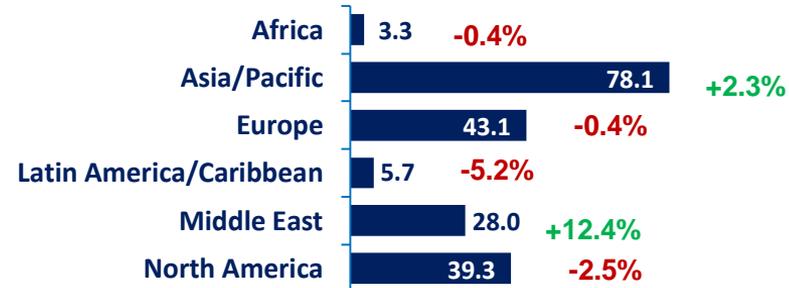
Passengers carried (million)



Revenue Passenger-Kilometres (billion)



Freight Tonne-Kilometres (billion)





Traffic rankings in 2014-15

International Scheduled Revenue Tonne-Kilometres (RTK)

Rank	State of AOC	RTK 2014	RTK share (%)	Cumulative (%)
1	China (1)	62,661,657,151	11.76083%	11.76083%
2	United States	62,359,064,486	11.70404%	23.46486%
3	United Arab Emirates	46,892,720,885	8.80119%	32.26605%
4	United Kingdom	30,158,001,753	5.66029%	37.92634%
5	Germany	28,814,799,214	5.40819%	43.33453%
6	Republic of Korea	20,764,711,405	3.89728%	47.23181%
7	Singapore	18,511,391,369	3.47436%	50.70617%
8	France	17,732,411,000	3.32816%	54.03433%
9	Netherlands	15,962,395,348	2.99595%	57.03028%
10	Japan	14,581,032,148	2.73668%	59.76696%
11	Qatar	14,293,445,230	2.68271%	62.44967%
12	Turkey	13,771,403,581	2.58472%	65.03439%
13	Canada	11,983,608,812	2.24918%	67.28357%
14	Ireland	11,868,967,019	2.22766%	69.51123%
15	Russian Federation	11,802,890,290	2.21526%	71.72649%
16	Malaysia	9,593,485,831	1.80058%	73.52707%
17	Australia	8,855,781,434	1.66212%	75.18919%
18	Thailand	8,473,871,575	1.59044%	76.77963%
19	Spain	7,995,446,551	1.50065%	78.28028%
20	India	6,510,575,876	1.22196%	79.50223%

Rank	State of AOC	RTK 2015	RTK share (%)	Cumulative (%)
1	China (1)	70,403,245,196	12.42421%	12.42421%
2	United States	61,944,119,667	10.93141%	23.35562%
3	United Arab Emirates	52,100,507,516	9.19429%	32.54991%
4	United Kingdom	31,065,034,269	5.48211%	38.03203%
5	Germany	30,507,251,927	5.38368%	43.41571%
6	Republic of Korea	21,802,605,943	3.84755%	47.26326%
7	Singapore	18,615,753,428	3.28516%	50.54842%
8	France	18,295,414,100	3.22863%	53.77705%
9	Qatar	17,359,871,880	3.06353%	56.84059%
10	Netherlands	15,732,743,524	2.77639%	59.61698%
11	Turkey	15,587,345,360	2.75073%	62.36771%
12	Japan	15,527,311,664	2.74014%	65.10785%
13	Ireland	13,165,546,390	2.32335%	67.43120%
14	Canada	13,040,382,256	2.30126%	69.73246%
15	Russian Federation	11,635,019,200	2.05326%	71.78572%
16	Australia	9,368,848,020	1.65334%	73.43906%
17	Spain	9,215,837,003	1.62634%	75.06540%
18	Thailand	9,113,598,830	1.60830%	76.67370%
19	Malaysia	8,966,590,598	1.58235%	78.25605%
20	India	6,994,194,840	1.23428%	79.49033%



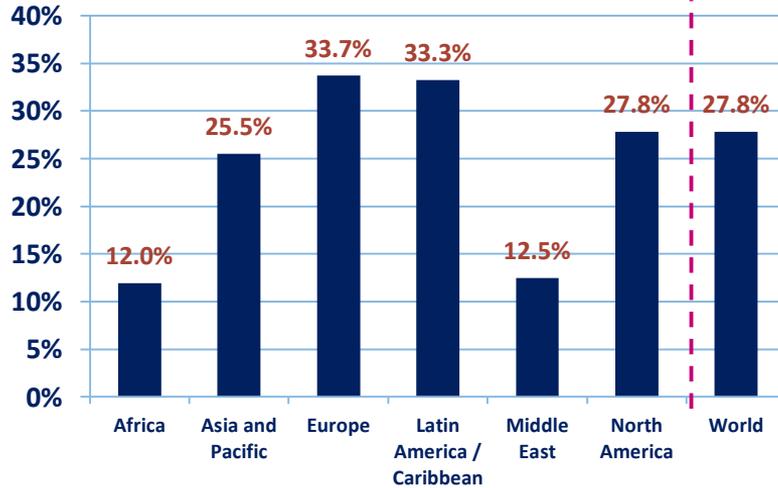
Rank No.	City and airport code	Passenger (thousand)		2015/2014 (%)	Movements (thousand)		2015/2014 (%)
		2015	2014		2015	2014	
1	Atlanta (ATL)	101,491	96,179	5.5	882	868	1.7
2	Beijing (PEK)	89,939	86,128	4.4	590	582	1.4
3	Dubai (DXB)	78,015	70,476	10.7	407	357	13.9
4	Chicago (ORD)	76,950	69,999	9.9	875	882	-0.8
5	Tokyo (HND)	75,573	72,827	3.8	439	426	2.9
6	London (LHR)	74,990	73,408	2.2	474	473	0.2
7	Los Angeles (LAX)	74,937	70,663	6.0	656	637	2.9
8	Hong Kong (HKG)	68,488	63,122	8.5	406	391	3.8
9	Paris (CDG)	65,767	63,814	3.1	476	471	1.0
10	Dallas/Fort Worth (DFW)	64,174	63,554	1.0	681	680	0.2
11	Istanbul (IST)	61,323	56,716	8.1	447	440	1.6
12	Frankfurt (FRA)	61,032	59,566	2.5	468	469	-0.2
13	Shanghai (PVG)	60,098	51,688	16.3	449	402	11.7
14	Amsterdam (AMS)	58,285	54,978	6.0	466	453	2.8
15	New York (JFK)	56,827	53,255	6.7	439	422	4.0
16	Singapore (SIN)	55,449	54,093	2.5	351	347	1.2
17	Guangzhou (CAN)	55,202	54,780	0.8	410	412	-0.6
18	Jakarta (CGK)	54,054	57,221	-5.5	380	391	-2.8
19	Denver (DEN)	54,015	53,473	1.0	548	566	-3.2
20	Bangkok (BKK)	52,384	46,423	12.8	320	294	8.8
21	San Francisco (SFO)	50,058	47,115	6.2	430	432	-0.5
22	Incheon (ICN)	49,413	45,662	8.2	308	293	5.2
23	Kuala Lumpur (KUL)	48,929	48,930	0.0	353	341	3.6
24	Madrid (MAD)	46,780	41,834	11.8	367	343	7.0
25	New Delhi (DEL)	45,982	39,753	15.7	349	324	7.9

Top 25 airports in 2015 passenger traffic



Low-cost carriers (LCCs) stimulating traffic

Share of passengers carried by LCCs in 2015



Passenger number growth for LCCs and other carriers

	2014	2015
LCCs	9.8%	10.3%
Others	4.2%	5.5%
Total	5.7%	6.8%

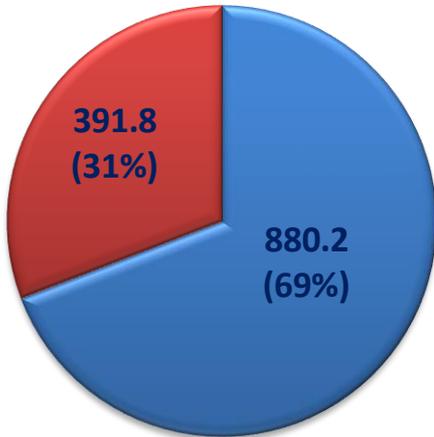
LCCs growth has been consistently twice as much as other carriers' growth



Passenger Flow: Direct vs indirect flights

International Passenger Flow
2015 (In millions)

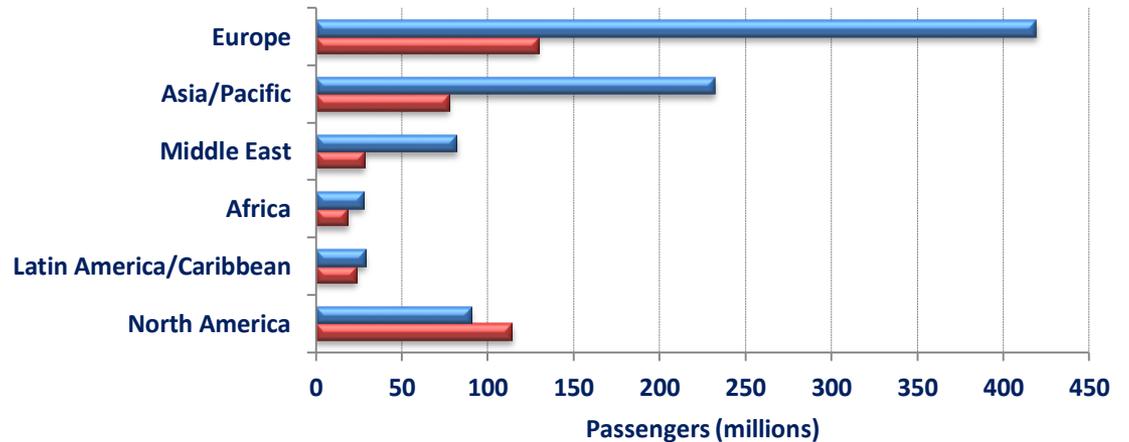
Total Passengers: 1271.9



■ Direct Flights Passengers

■ Connecting Flights Passengers

Passengers Flow by Region of Departure
2015

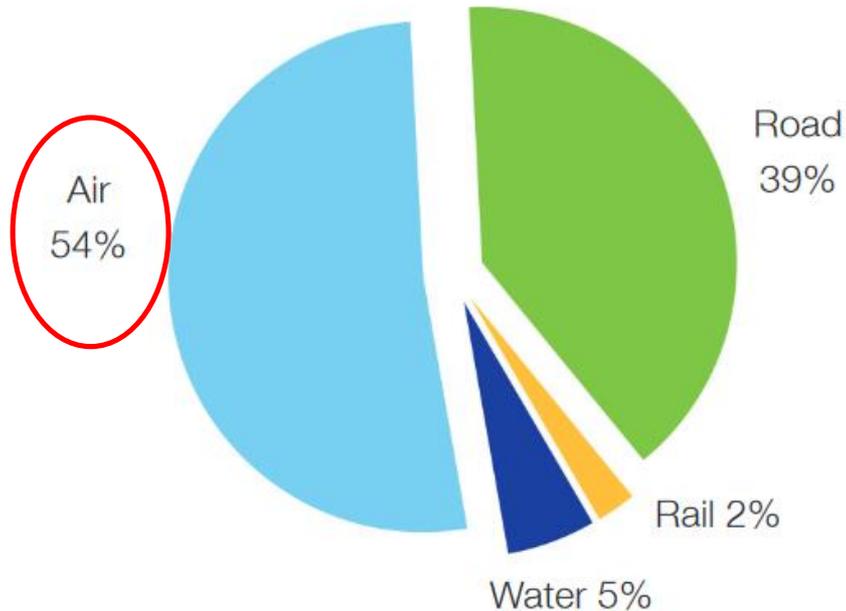


■ Direct Flights Passengers

■ Connecting Flights Passengers

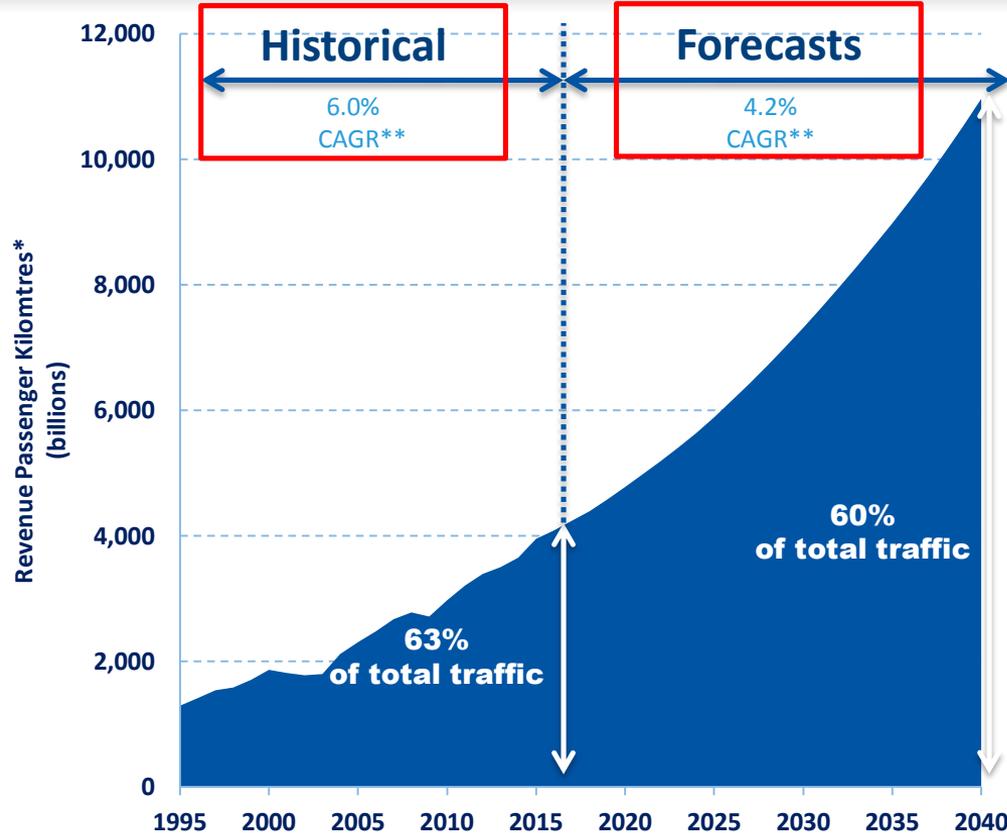


More than half of international tourists arrive by air



Inbound tourism by mode of transport in 2014

- Tourism expansion relies heavily on air transport, providing substantial economic benefits for anyone involved in the value chain of tourism
- Separate sectorial policies on air transport and tourism result in a fundamental, and too often even conflicting disconnect which constitutes a severe constraint on the development of travel and tourism

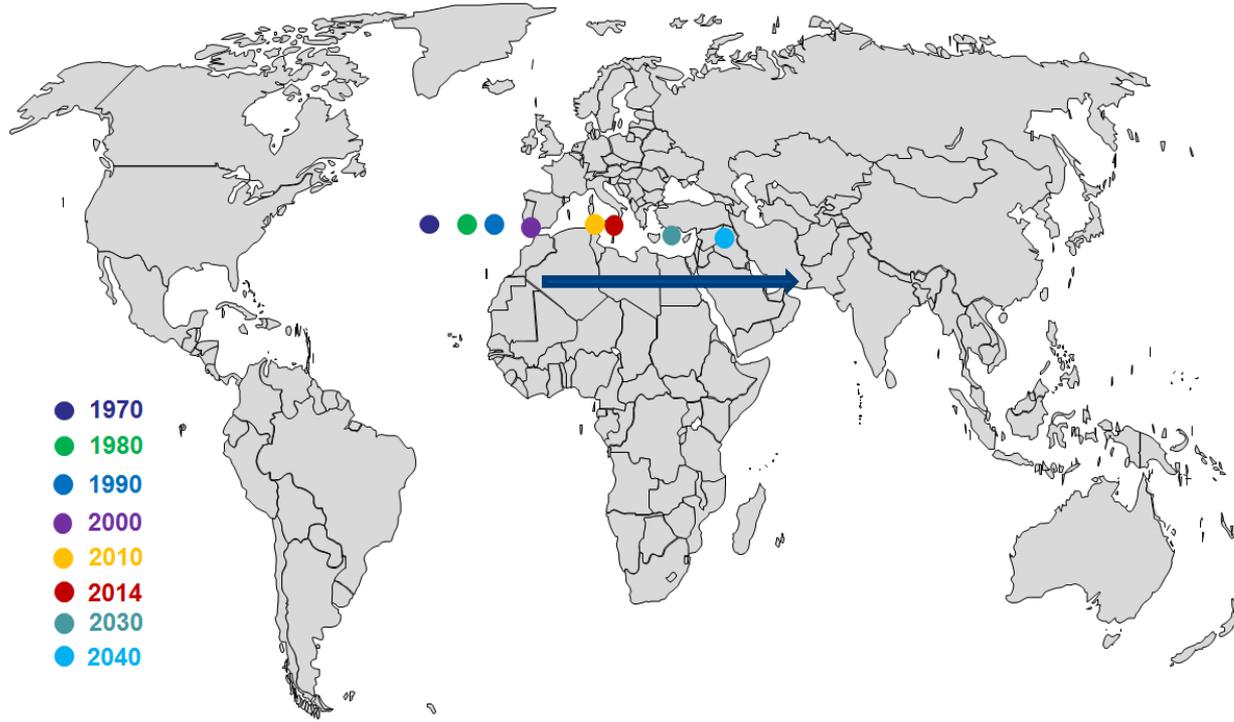


Long-term air traffic forecasts

Scheduled international passenger traffic

Projected Top 10 Routes 2040

Rank 2040	Rank 2015	Long Term Forecast Route Group	Share 2040	Share 2015
1	4	Central Southwest Asia - Pacific South East Asia	11.9%	5.4%
2	1	Intra Europe	11.5%	15.8%
3	8	Central Southwest Asia - Middle East	11.3%	3.9%
4	2	Europe - North America	9.0%	11.8%
5	3	Central Southwest Asia - Europe	7.3%	5.8%
6	5	Intra Pacific South East Asia	6.1%	4.5%
7	7	Central Southwest Asia - North America	5.9%	4.1%
8	18	Central Southwest Asia- North Asia	4.6%	1.9%
9	6	Europe - Middle East	3.6%	4.5%
10	9	Europe - Pacific South East Asia	3.5%	3.6%



Centre of gravity

The **centre of gravity** has been steadily moving from the **middle of North Atlantic** to the **middle of the Mediterranean sea** in the last four decades. It is expected to move further east by 2040.

Geographical centre of gravity of departing/arriving passengers



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Air Transport Policy and Regulation



ICAO's air transport policy and regulation programme is designed to:

- a) reduce State's costs in performing its economic regulatory functions
- b) increase consumer's benefits and choices;
- c) improve air connectivity; and
- d) create more competitive business opportunities in the marketplace;

thereby contributing to the sustainable economic development and to the expansion of trade and tourism.



- **ICAO long-term vision of international air transport liberalization,**
- **International agreements for liberalization of market access, air cargo and air carrier ownership and control,**
- **Competition issues; ICAO compendium and exchange forum (IATS2016)**
- **core principles on consumer protection,**
- **Support regional efforts in liberalization** (implementation of YD, and declarations of 2014 Lomé and 2015 Antananarivo meetings)



What is Air Connectivity?

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

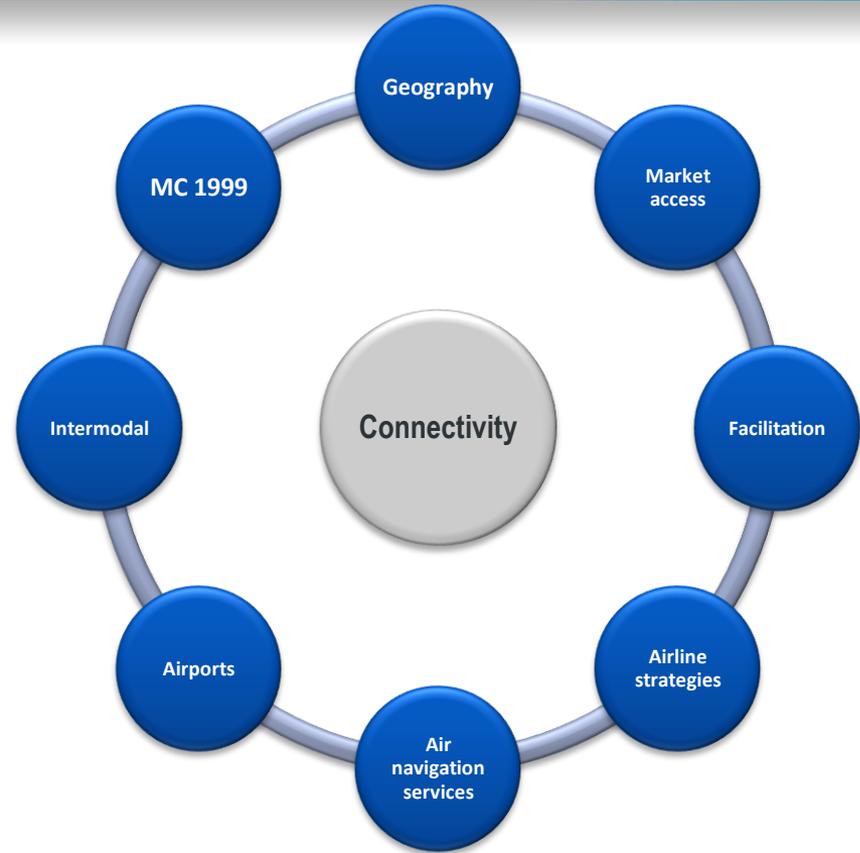
- which makes trip as **short** as possible
- with **optimal** user satisfaction
- at the **minimum** price possible



What is Air Connectivity?

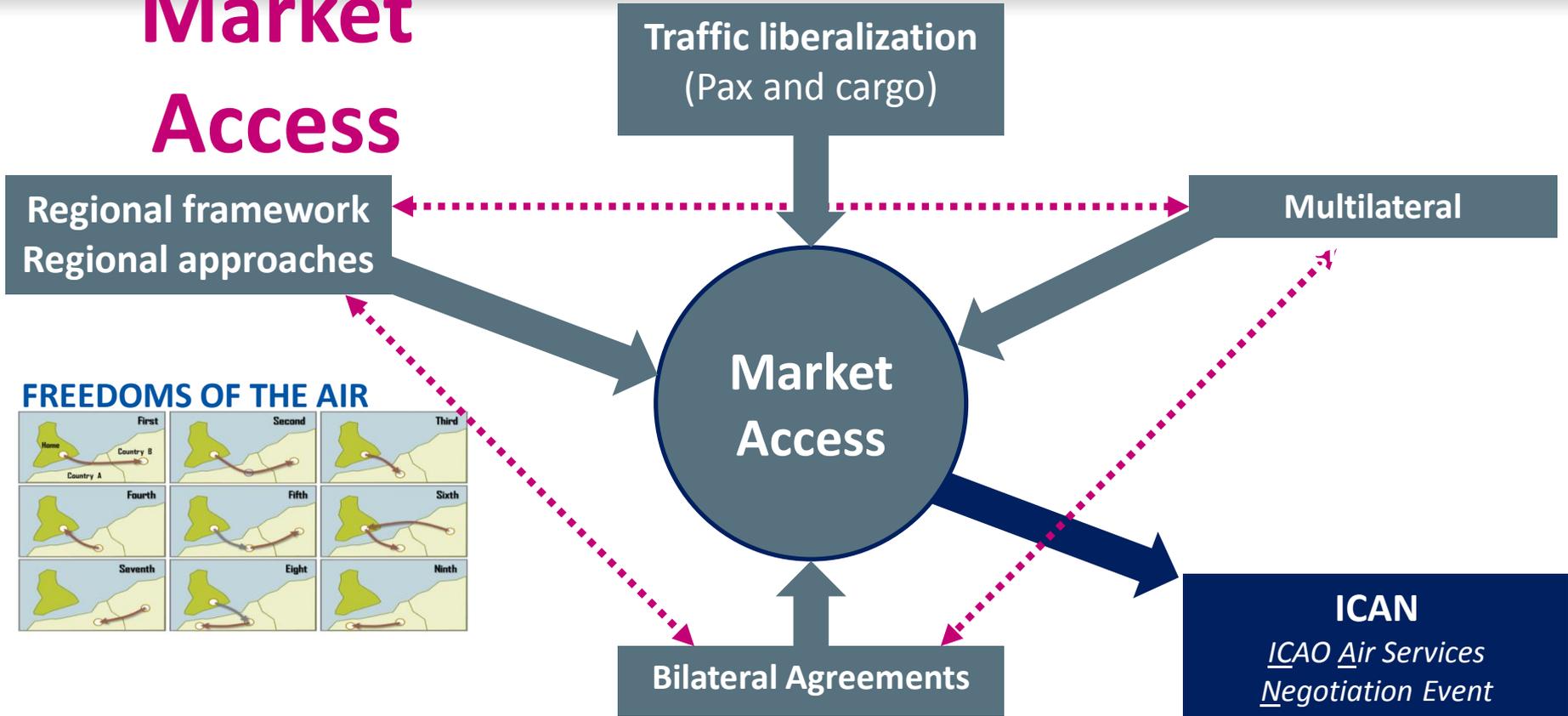
Factors of air connectivity:

- Geography
- Airline strategies
- Air navigation services
- Airport infrastructure
- Intermodal integration
- Facilitation
- **Regulatory framework**
- **Market access (air services agreements)**

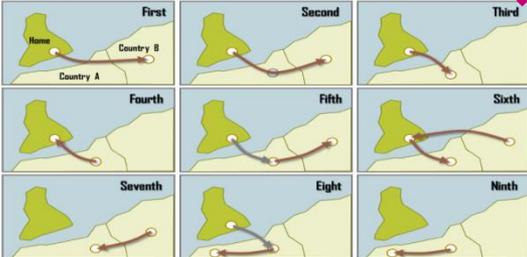




Market Access



FREEDOMS OF THE AIR





ICAO Air Services Negotiation (ICAN) Event Nassau, Bahamas (5-9 December 2016)



ICAN website
<http://www.icao.int/Meetings/ICAN2016>

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A United Nations Specialized Agency

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2016 ICAO AIR SERVICES NEGOTIATION EVENT

Programme
Other Events

ICAO Air Services Negotiation Event (ICAN2016)

Date: 5 - 9 December 2016
Location: The Bahamas
Venue: TBA
Registration:

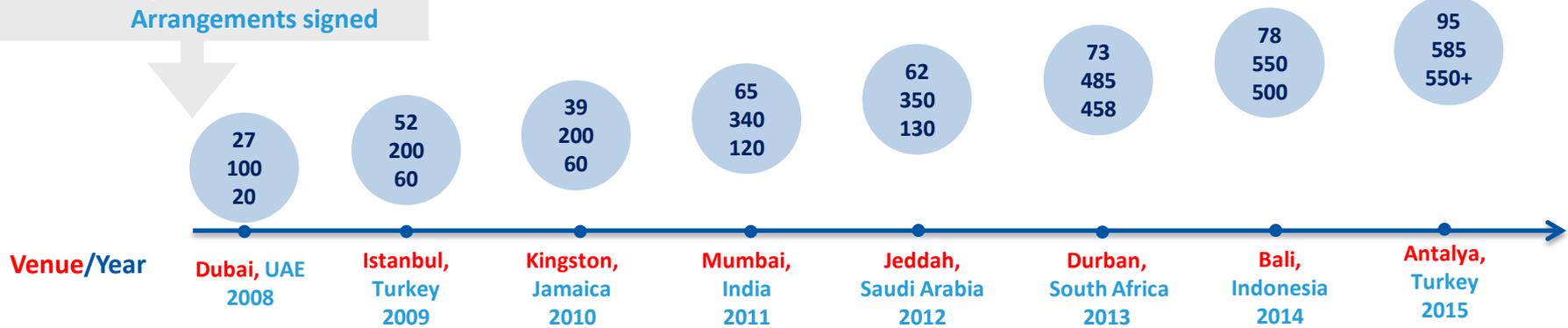
The ninth ICAO Air Services Negotiation Event (ICAN2016) will be held in the Bahamas, from 5 to 9 December 2016. It will be hosted by the Ministry of Transport and Tourism, Bahamas.



ICAN benefits

Numbers:

- Participating States;
- Bilateral meetings held
- Agreements and Arrangements signed



- **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**



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Infrastructure Management



ICAO's infrastructure management programme aims at enhancing and promoting sustainable development of infrastructure for the provision and operation of airports and air navigation services.

The programme offers solutions to:

- a) improve organizational and managerial capability of providers;
- b) reduce the financing burden on governments;
- c) protect user's interests;
- d) allow early benefits of new technologies; and
- e) facilitate access to funding for long-term investment needs.



Financing air transport

- Future traffic growth in Africa requires modernization and expansion of aviation infrastructure
- Challenges for States: funding & financing difficulties; lack of development assistance to aviation projects
- Existing ICAO documents on financing are for Infrastructures only (airports and ANSPs)
- Implementation of Aviation System Block Upgrade (ASBUs) to require around USD 400 billion
- IWAF 2016 encouraged States to take pragmatic measures to build a transparent, stable and predictable investment climate to support aviation development by engaging multi-stakeholders



- **AEP and ANSEP** continue to review and improve **ICAO guidance material on infrastructure economics and management**
- Multi-disciplinary Working Group supports implementation of ASBUs
- **Survey of States on the level of implementation of ICAO policies on charges** indicates **most responding States** (representing 84 % of total flight departures in 2014) followed ICAO policies
- **Cooperation with other organizations and industry continues**, e.g. with ACI in addressing investment needs of airports, and issues on economic oversight; **2016 ACI conference on “creating the conditions to meet future demand”** to be held in Goa, India from 6-8 December 2016



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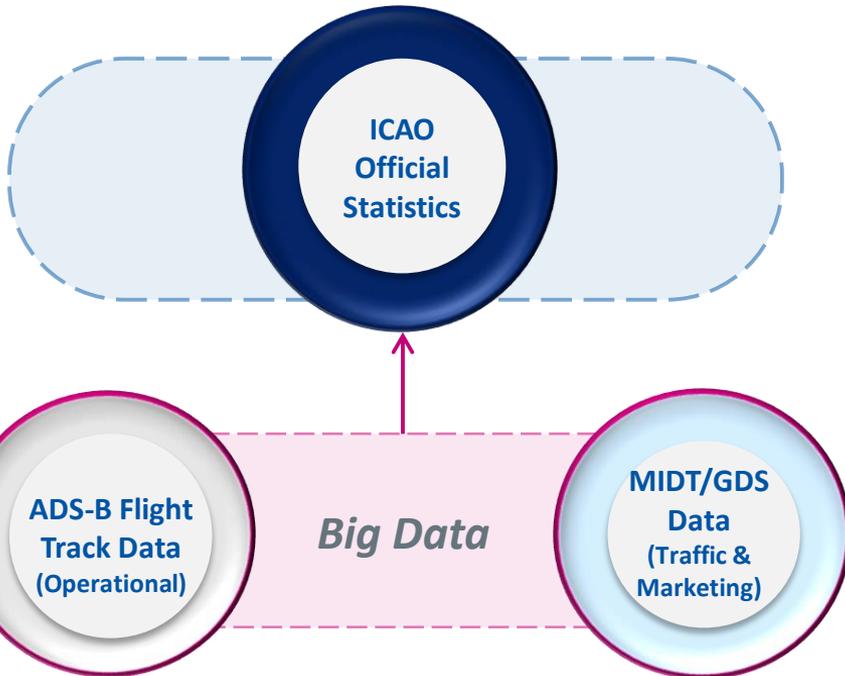
Aviation Data and Analysis



The need of Big Data

For the first time, a low cost and high efficiency opportunity exists toward gaining insights from the big data that cannot be done using localized data sets:

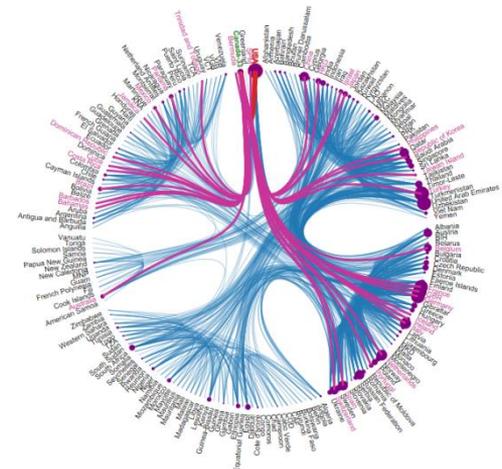
- Informed policy making
- Meet Strategic objectives
- Give States what they needed
- Improve coverage to nearly 100%
- Reduce costs





eTools

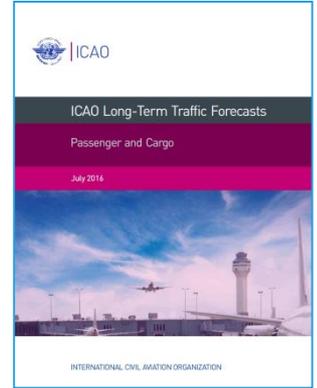
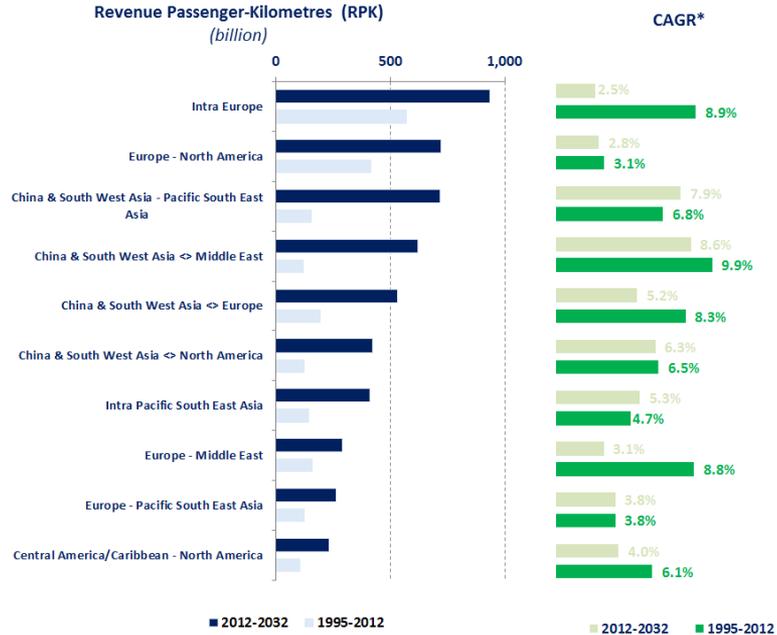
9 Modules: Traffic Trends, Air Law Treaty, Airport Punctuality, Connection diagram, State Traffic (departures), Fleet information, Airport, Traffic Map, WASA Map.





Single set of long-term traffic forecasts

- 40 international route groups
- 9 domestic route groups
- 10 year, 20 year and 30 year projections
- Passenger and cargo traffic





Global market-based measures (MBM) for international aviation

Development , in coordination with the Committee on Aviation Environmental Protection (CAEP) and the Aviation Data and Analysis Panel (ADAP), an **implementation framework for the Monitoring, Reporting and Verification (MRV)** elements of the global MBM scheme.



Aviation Satellite account

- Preparation of the draft methodological framework document on the Aviation Satellite Account to measure the size of aviation-related direct gross domestic product (GDP).
- Presentation to the next Aviation Data and Analysis Panel (ADAP) in March 2017.
- Member States and observers of ADAP will review the methodological framework document by the end of 2017 to see if it conforms to the System of National Accounts (SNA) principles, and any deviation from SNA principles will be accepted due to peculiarities of the aviation sector.



Global Indicator for UN Sustainable Development Goals (SDGs)

- **Goal:** measure the progress of the SDGs.
- 47th Session of the UN Statistical Commission held in March 2016 endorsed the initial global indicator framework.
- **ICAO supports the agreed global indicator** of SDG Target 9.1– passenger and freight volumes by mode of transport – by serving as the **custodial agency responsible for collecting air traffic data and sharing the information with the UN.**
- SDG Target 9.1 refers to “Develop quality, reliable, sustainable and resilient infrastructure, including regional and trans border infrastructure, to support economic development and human well-being, with a focus on affordable and equitable access for all.”



Working with data partners

- Member States
 - Australia, Brazil, China, Ethiopia, France (ENAC), India (CAA), Poland, Portugal, United Kingdom (CAA), United States (FAA, US DOT) etc.
- United Nations Statistical Commission (UNSC)
 - Aviation Satellite Account to measure the economic benefits of air transport, Global indicator for SDG Target 9.1
- World Health Organization (WHO)
 - Provision of traffic flows and intermediate stops of passengers originating from Zika affected regions
- Universal Postal Union (UPU)
 - Sharing with ICAO Big Data of e-commerce and mail transport, as well as joint research on e-commerce
- United Nations Conference on Trade and Development (UNCTAD)
 - Sharing with ICAO on global trade and other modal transportation, as well as global connectivity
- World Tourism Organization (UNWTO)
 - Sharing with ICAO on tourism statistics
- World Bank
 - Exchange of economic and aviation indicators
- International Transport Forum (ITF at OECD)
 - Traffic forecasts, competition analysis
- ICM, University of Warsaw
 - Competition analysis (direct vs indirect flights) by using MIDT, Air Transport Optimizer Tool by using ADS-B
- Airports Council International (ACI)
 - Joint collection of airport statistics, airport charge
- AACO (Arab Air Carriers Organization)
- AFRAA (African Airlines Association)
- ALTA (Latin American and Caribbean Air Transport Association)
 - Exchange of regional traffic statistics



<https://www4.icao.int/newdataplus>

Secure a
Competitive
Advantage in
your Market



Credible, Unique,
and Complete
Data for Aviation
Professionals
and More!

INTRODUCING ICAO'S NEW DATA PLUS WEB PLATFORM



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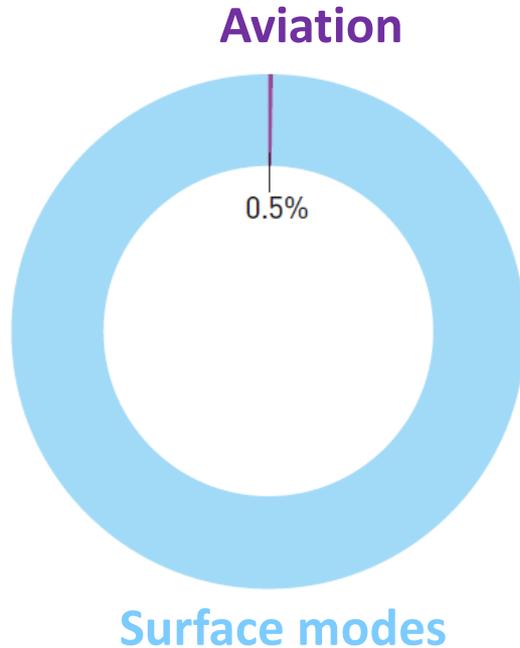
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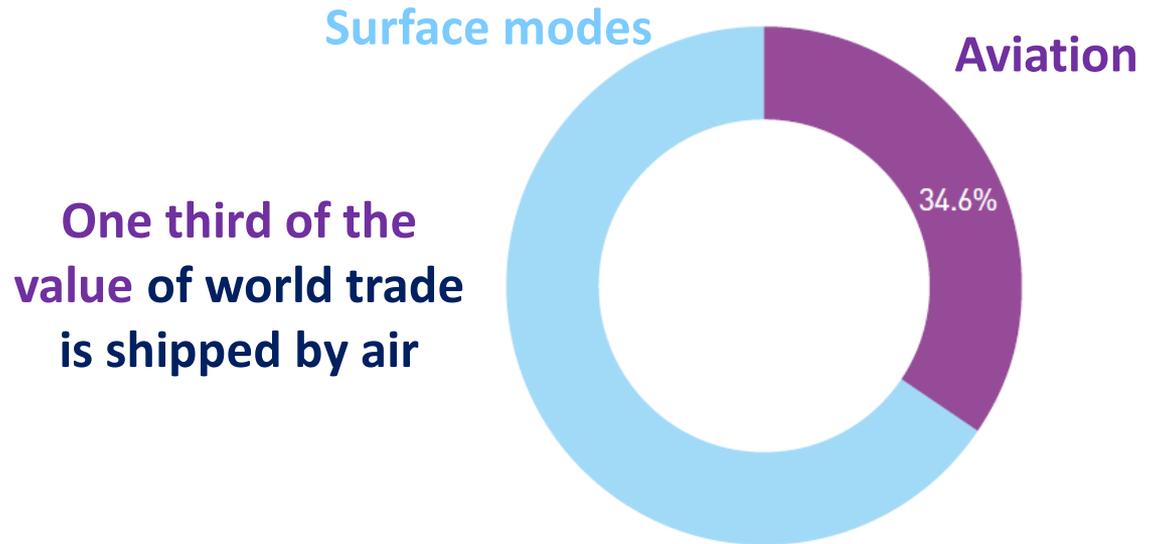
Air Cargo



Volume of world international cargo shipment



Value of world international cargo shipment





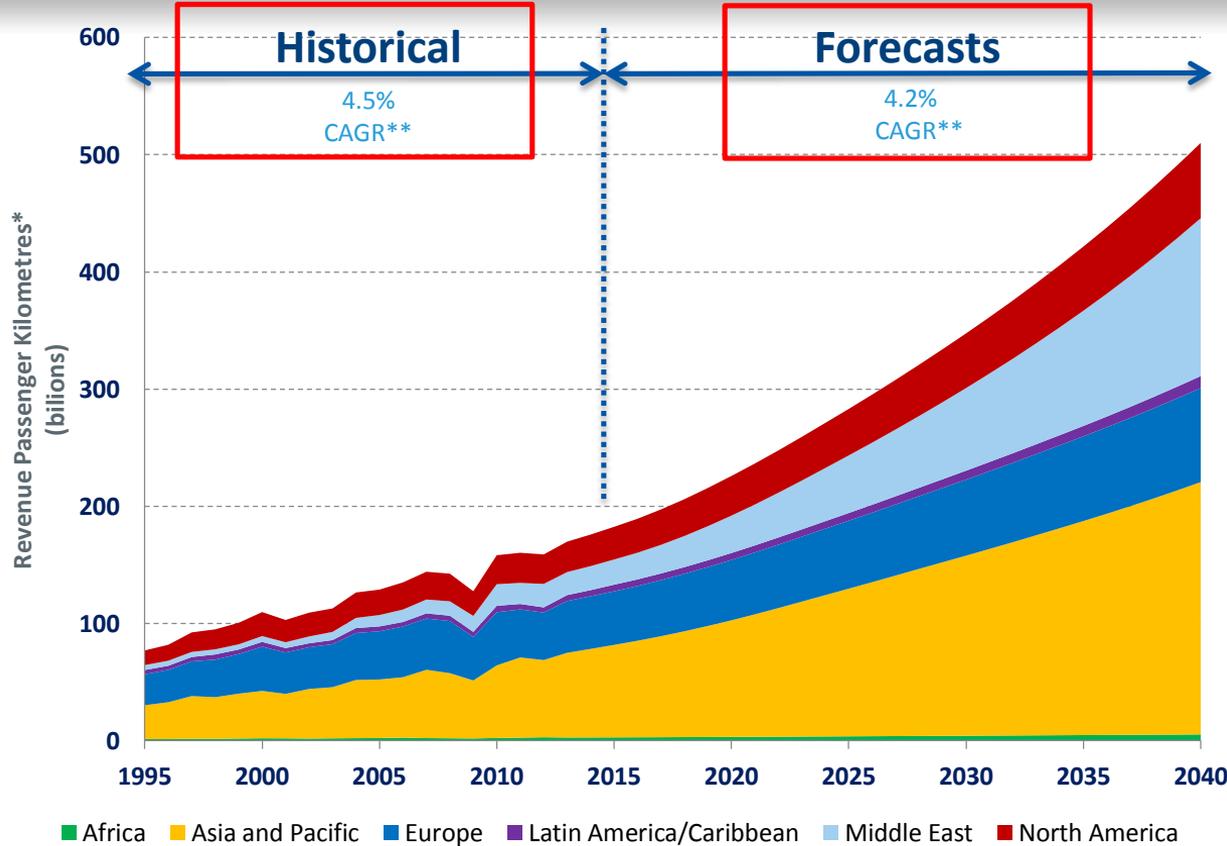
Top 15 airports in 2015 cargo traffic

Rank No.	City and airport code	Freight tonnes 2015/2014	
		2015	(%)
1	Hong Kong (HKG)	4,379,762	+0.1%
2	Memphis (MEM)	4,289,377	+0.9%
3	Shanghai (PVG)	3,178,985	+2.5%
4	Anchorage (ANC)	2,624,312	+5.3%
5	Dubai (DXB)	2,505,507	+4.5%
6	Incheon (ICN)	2,489,662	+0.6%
7	Louisville (SDF)	2,262,650	+1.9%
8	Tokyo (NRT)	2,085,275	-0.6%
9	Taipei (TPE)	2,008,703	-3.1%
10	Frankfurt (FRA)	1,993,467	-2.8%
11	Miami (MIA)	1,970,616	-0.1%
12	Beijing (PEK)	1,889,830	+2.7%
13	Paris (CDG)	1,861,197	-1.4%
14	Singapore (SIN)	1,853,000	+0.5%
15	Los Angeles (LAX)	1,846,010	+5.7%



Montreal Convention 1999

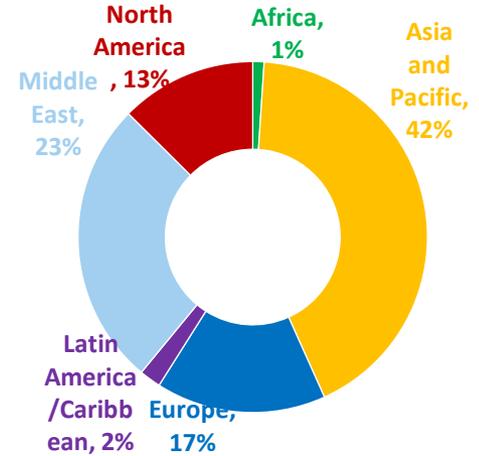
- An air cargo shipment can generate **up to 30 paper documents...**
- For airlines and other airfreight operators to use **e-air waybill**, States (of origin & destination of shipment) must be parties to **MC99**
- Today, **120 States** are party to MC99
- **39th ICAO Assembly:** “**Urges Member States** that have not yet become parties to [...] MC99 and other ICAO instruments governing international air transport to give **urgent consideration** to so doing”



Long-term air traffic forecasts

Scheduled international freight traffic

Projected International Freight Traffic Breakdown by AOC 2040





The Future of Air Cargo: Big Online Retailers? Drones ?



Amazon:

E-commerce giant Amazon has signed up to lease 40 freighters, 20 from Atlas Air Worldwide Holdings and another 20 from ATSG. Amazon also registered a company in the U.S. as a non-vessel operating common carrier (NVOCC), which turned Amazon into a freight forwarder.

Alibaba:

Alibaba's logistics arm, Cainiao Logistics, helped Alibaba rake in a staggering US\$14.3 billion in a 24-hour period on 2015 "Singles Day"!

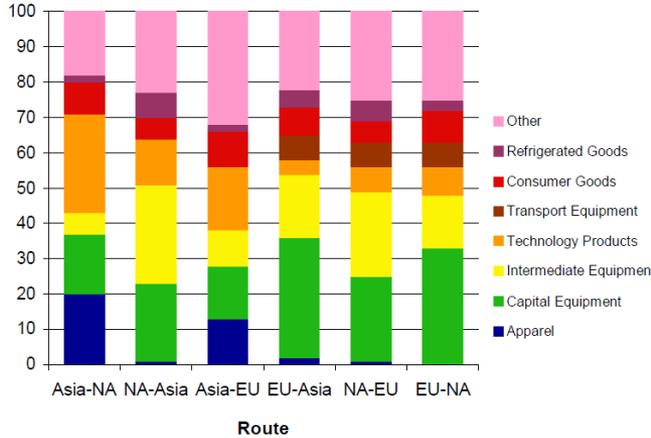


- **Amazon** announced its drone delivery program "Amazon Prime Air" since December 2013. Amazon has developed drones weighs less than 55 pounds and can carry up to a 5-pound payload.
- UAV manufacturer **Matternet**, announced its partnership with Swiss WorldCargo and Swiss Post on a project to test its drone aircraft as an automated cargo delivery system for small express packages.
- China's **S.F. Express** has revealed it already has a fleet of aircraft flying 500 parcels a day to remote areas, and it is now looking to double the capacity..
- Chinese online retailer **JD.com** has also tested drone deliveries to the remote countryside.



E-Commerce stimulates air cargo

Air Cargo By Commodity



Source: World Bank

Aggregated Tonnage of Postal Shipments (in million)

	total	letter-post	parcel-post	EMS
2013	458	163	168	126
2014	567	214	189	164
2015	656	218	220	218
2015/14	15.8%	2.2%	16.6%	32.8%
2014/13	23.8%	31.0%	12.1%	30.3%

Source: UPU Data on Postal Shipments

ICAO is cooperating with UPU and UNCTAD to share big data and research reports on e-commerce

- 2/3 of international postal transportation is by air
- Global B2C e-commerce sales hit \$1.5 trillion in 2015
- Double-digit annual growth in the e-commerce market
- High frequencies of E-commerce transactions may improve the load factors of air cargo carriers



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WCO Working Group on E-commerce

- 1st Meeting on 21 - 23 September 2016;
- established for the purpose of addressing cross-cutting issues in relation to growing e-commerce;
- Members include OECD, WTO and UPU, the Private Sector Consultative Group (PSCG), other stakeholders with recognized WCO observer status, e-commerce supply chain actors (e.g., e-vendors, e-market platforms, financial intermediaries) and academia.



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SECURITY & FACILITATION

Moving Air Cargo Globally

The purpose of this publication is to promote awareness of the air cargo and mail supply chain, with an emphasis on the related security and facilitation procedures developed by the International Civil Aviation Organization (ICAO), the World Customs Organization (WCO), the Universal Postal Union (UPU) and also the United Nations Office on Drugs and Crime (UNODC).

The intent is to provide a better understanding of supply chain security for those who work in the cargo field, and more broadly, anyone who might benefit from knowing more about international air cargo and mail security standards.

This document familiarizes readers with the roles and responsibilities of all entities involved in the transport of cargo and mail by air. It covers the various operational aspects, security factors, facilitation processes and documentation of that supply chain.

The reader will gain an understanding of the applicable regulatory frameworks and efforts made by International Organizations and their members to support information sharing and continued development of a secure air cargo industry. These provisions and activities enhance the movement of goods by promoting effective end-to-end supply chain security.



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SECURITY & FACILITATION

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www.icao.int/security/aircargo



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Belgium

Email: information@wcoomd.org
Tel.: +32 (0)2 209 92 11
Fax: +32 (0)2 209 92 42

www.wcoomd.org



Moving Air Cargo Globally Air Cargo and Mail Secure Supply Chain and Facilitation Guidelines

Second Edition

Moving Air Cargo Globally ICAO-WCO Joint Publication on Air Cargo Security and Facilitation (Second Edition)

Available for download in six
languages: Arabic, Chinese,
English, French, Russian,
Spanish

[www.icao.int/Security/aircargo/Pages/
Air-Cargo-and-Mail-Security-and-
Facilitation.aspx](http://www.icao.int/Security/aircargo/Pages/Air-Cargo-and-Mail-Security-and-Facilitation.aspx)



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ECONOMIC DEVELOPMENT

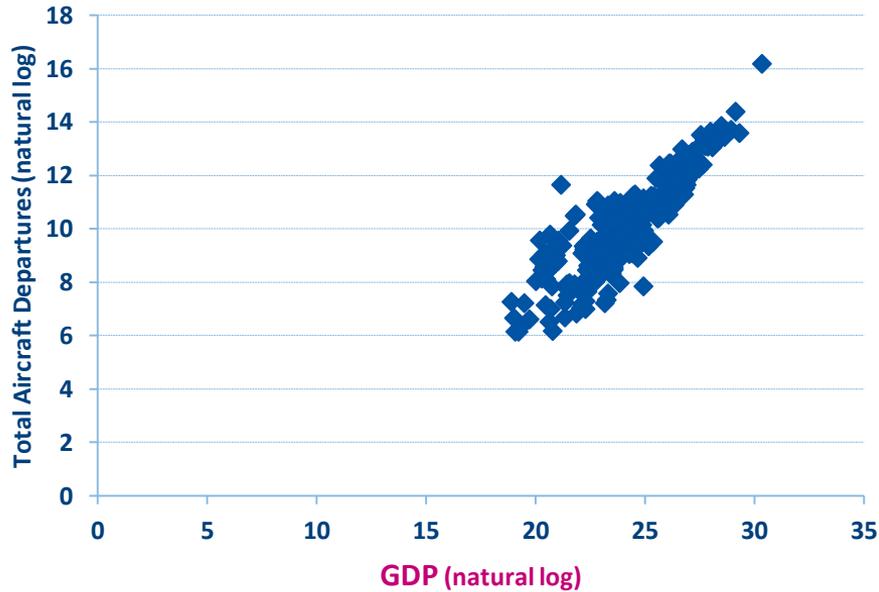
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Economic Development and Safety



Positive correlation of traffic with GDP, safety EI audit score, etc.

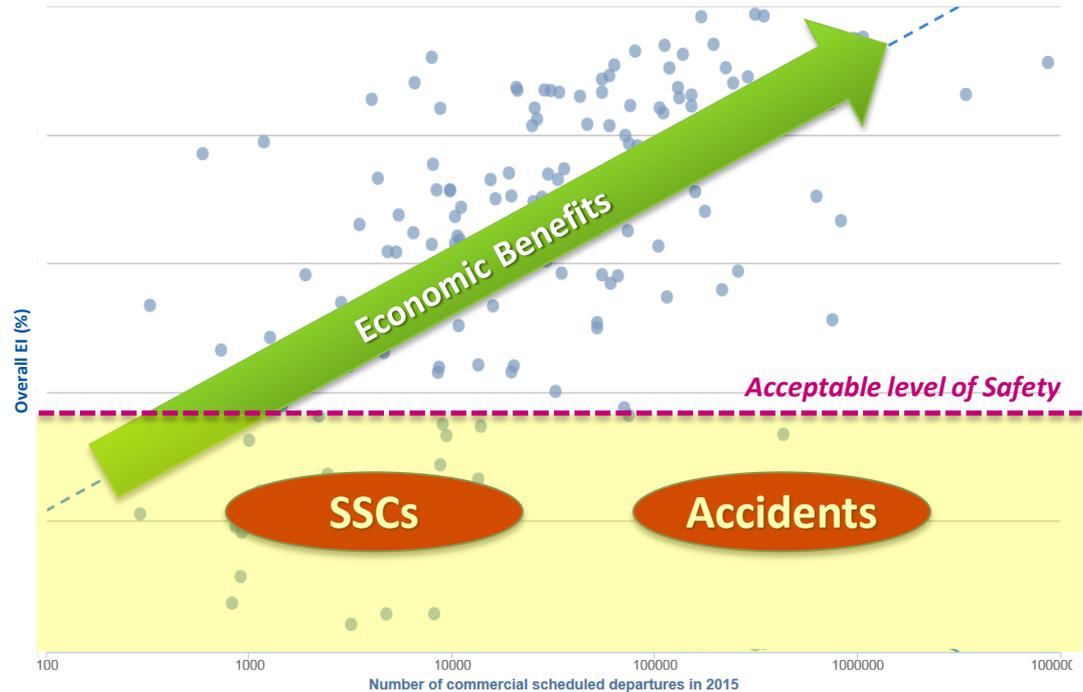




Aviation and Economic Development

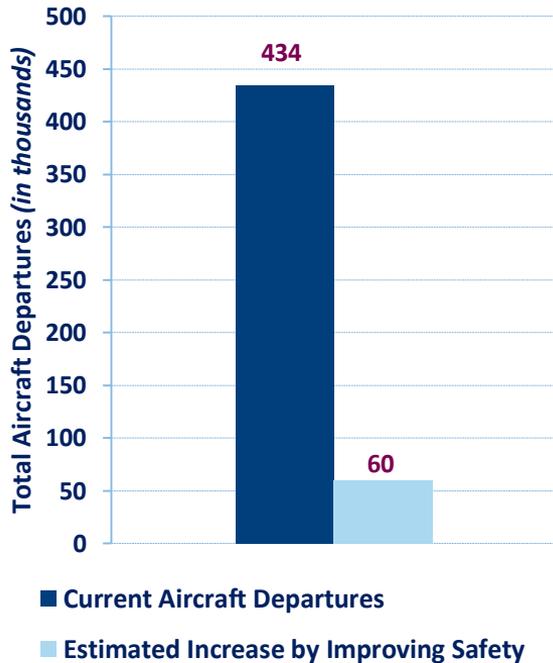
States can only access the economic benefits of aviation if the system is **safe, secure, and sustainable**

10% ↗ EI could generate
1,8% ↗ a/c departures

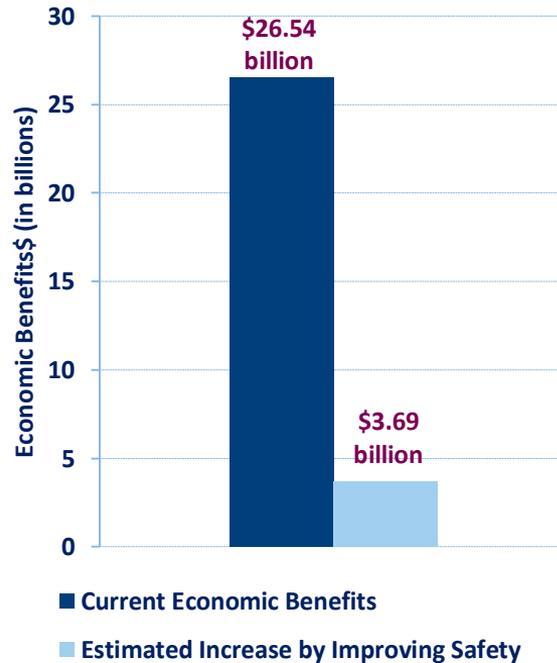




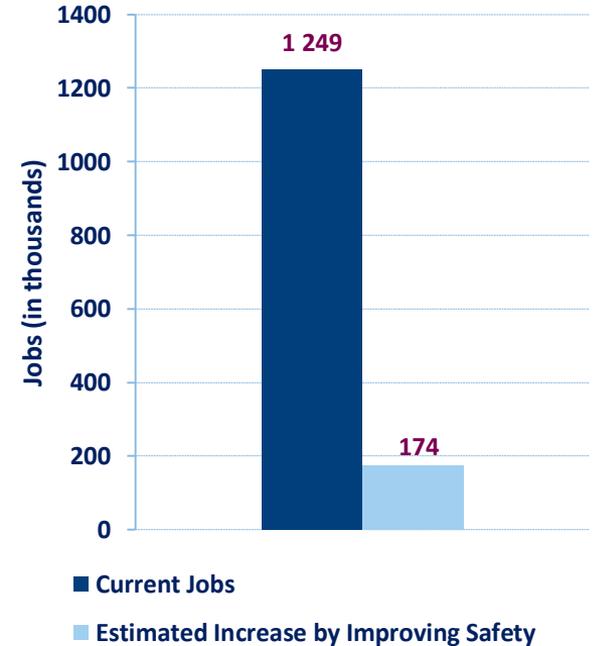
Total aircraft departures by improving EI score from 35% to 60%



Air transport economic benefits by improving EI score from 35% to 60%



Air transport jobs created by improving EI score from 35% to 60%





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Voluntary Air Transport Fund



Voluntary Air Transport Fund

- Mechanism for the collection and use of voluntary contributions from States and other donors to support ICAO's work in the air transport field
- For projects and activities not covered by the Regular Programme Budget under the Strategic Objective, Economic Development of Air Transport

Why Support ICAO ?

Air transport makes significant contributions across social, economic and environmental pillars of sustainable development. The mode of transport provides freedom to travel, access to mobility and the exchange of cultural experiences. As a result, air travellers represent 52% of international tourists, with over 2.9 billion passengers per year. In addition, 56.6 million jobs are supported by aviation worldwide (34.5 million are aviation-enabled jobs in the tourism sector). The industry gives rise to 3.5% of global GDP (2.2 trillion USD global economic impact). Moreover, air cargo represents 35% of world trade by value carried.

For more information, please visit:

<http://www.icao.int/sustainability/Pages/TRAF.aspx>



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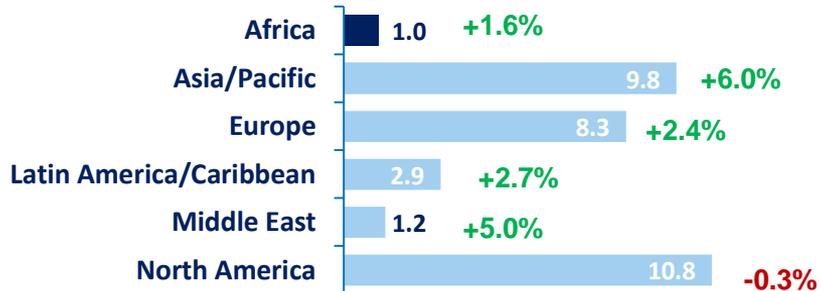


State of Air Transport in Africa

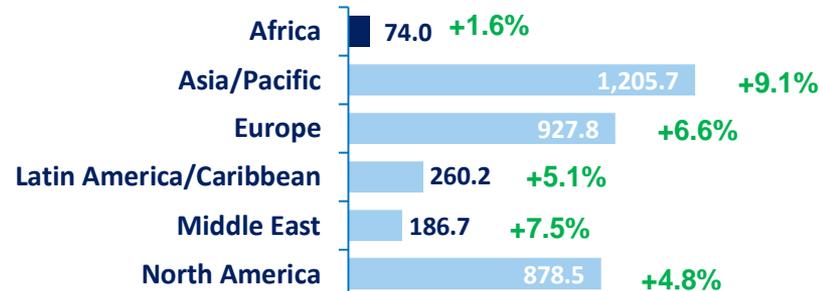


Air transport by region in 2015

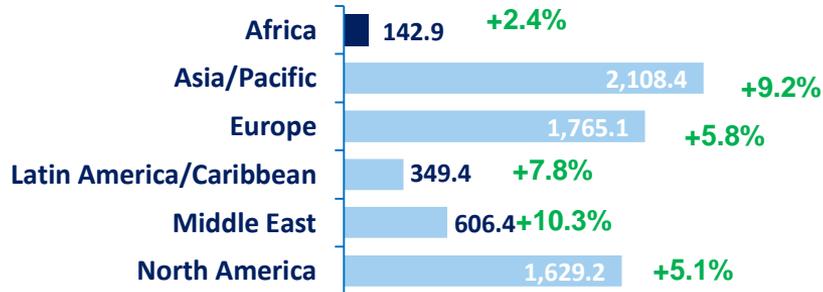
Aircraft departures (million)



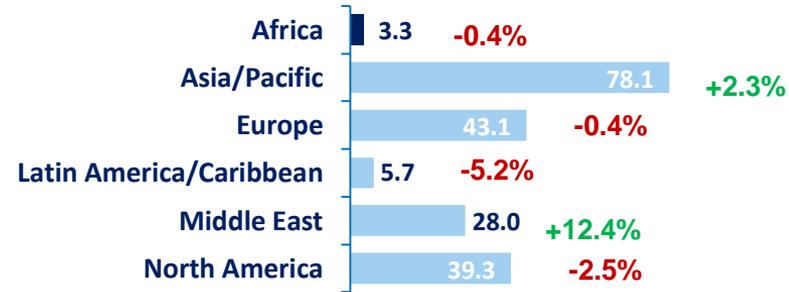
Passengers carried (million)



Revenue Passenger-Kilometres (billion)



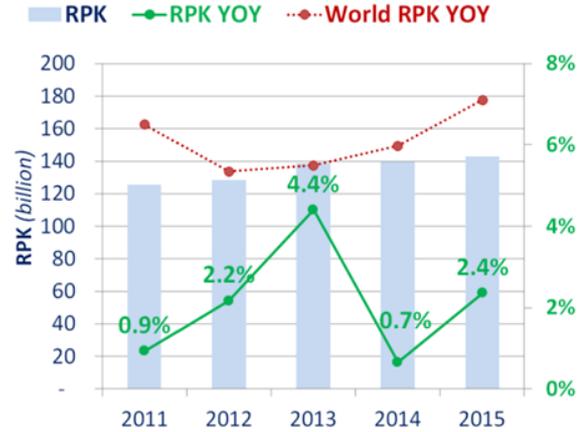
Freight Tonne-Kilometres (billion)





Passenger traffic trends in Africa

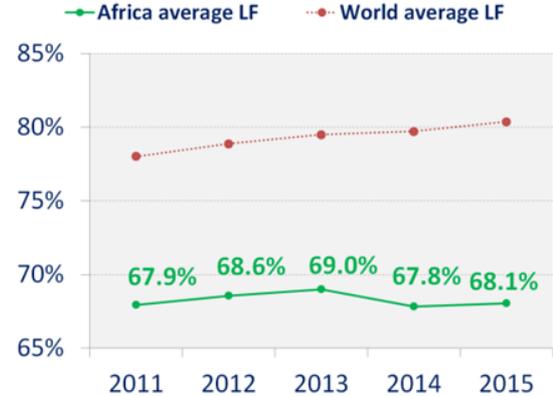
Revenue Passenger-Kilometres – RPK



Available Seat-Kilometres – ASK



Passenger Load Factor – LF



Revenue Passenger-Kilometres (RPK)

Total +2.4 %
International +2.3%
Domestic +2.7%

Available Seat-Kilometres (ASK)

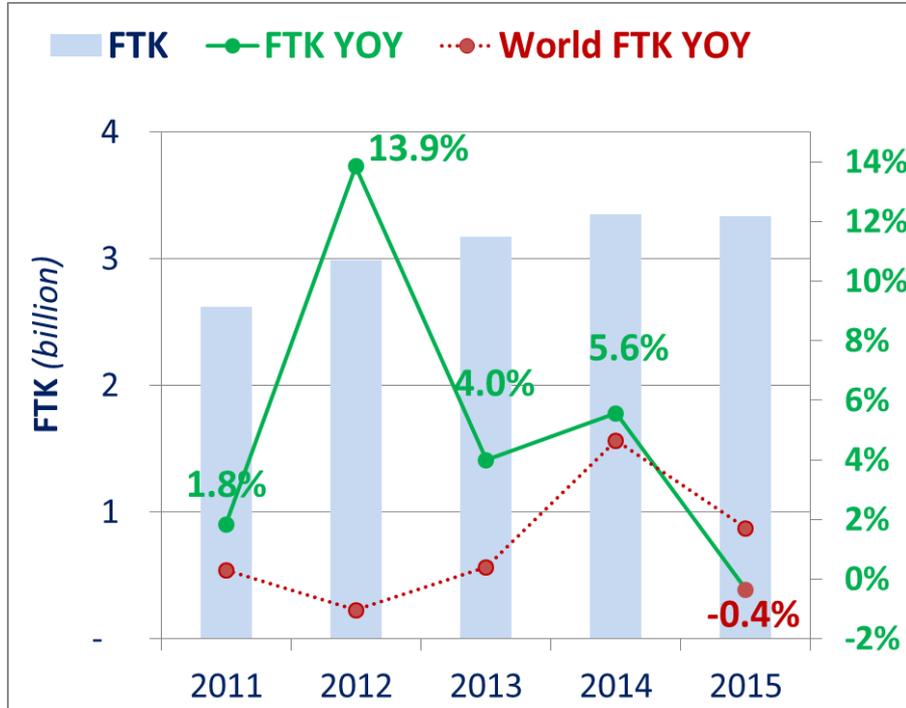
Total +2.0 %
International +1.9%
Domestic +2.7%

Passenger Load Factor (LF)

Total 68.1% (+0.3 pts)
International 67.5% (+0.3 pts)
Domestic 71.5% (stable)



Cargo traffic trends in 2015 Africa



Freight Tonnes-Kilometres (FTK)

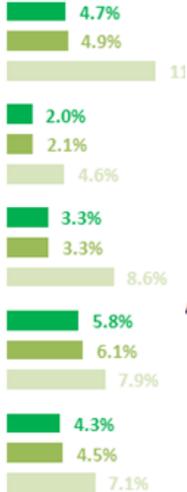
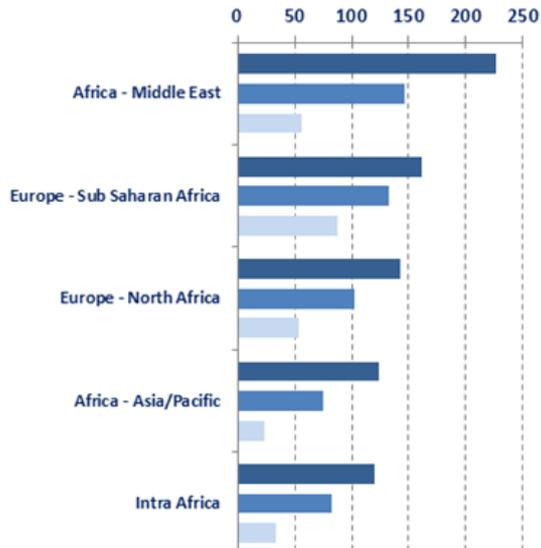
Total -0.4 %
International -0.3%
Domestic -4.3%



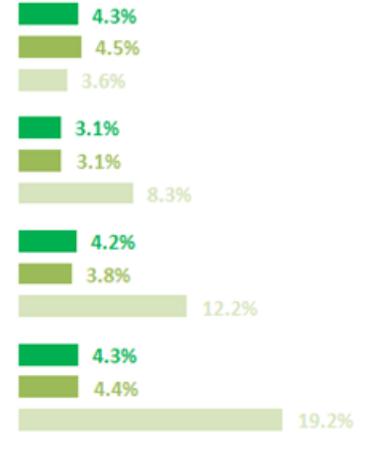
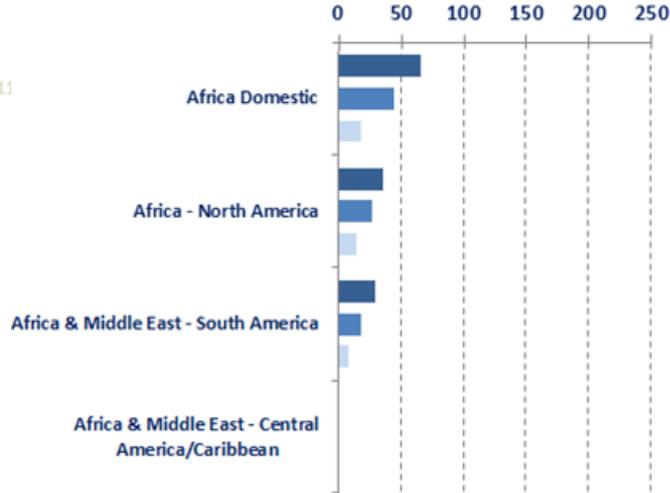
Africa top international passenger traffic by route group: 2032 vs 2012

Revenue Passenger-Kilometres (RPK)
(billion)

CAGR*



0 50 100 150 200 250



■ 2042 ■ 2032 ■ 2012

■ 2012-2042 ■ 2012-2032 ■ 1995-2012



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Efforts to improve the situation in Africa

- MEETING ON AIR CARGO DEVELOPMENT IN AFRICA
LOME, TOGO 2014.
- MEETING ON THE SUSTAINABLE DEVELOPMENT OF AIR
TRANSPORT IN AFRICA
ANTANANARIVO, MADAGASCAR, 2015.



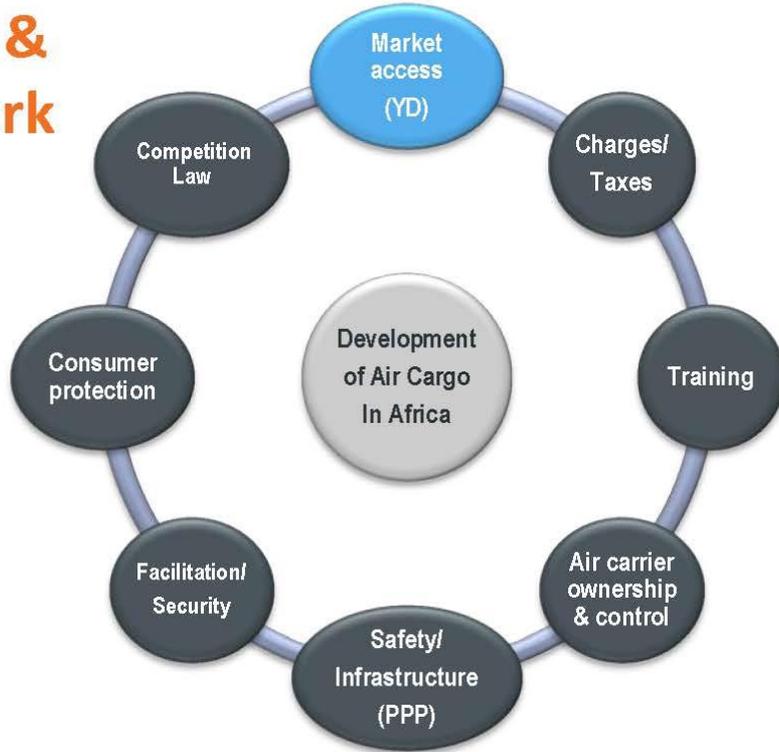


The Lomé Declaration and Action Plan

The need for Action & Regulatory framework

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GUIDANCE



POLICIES/REGULATIONS

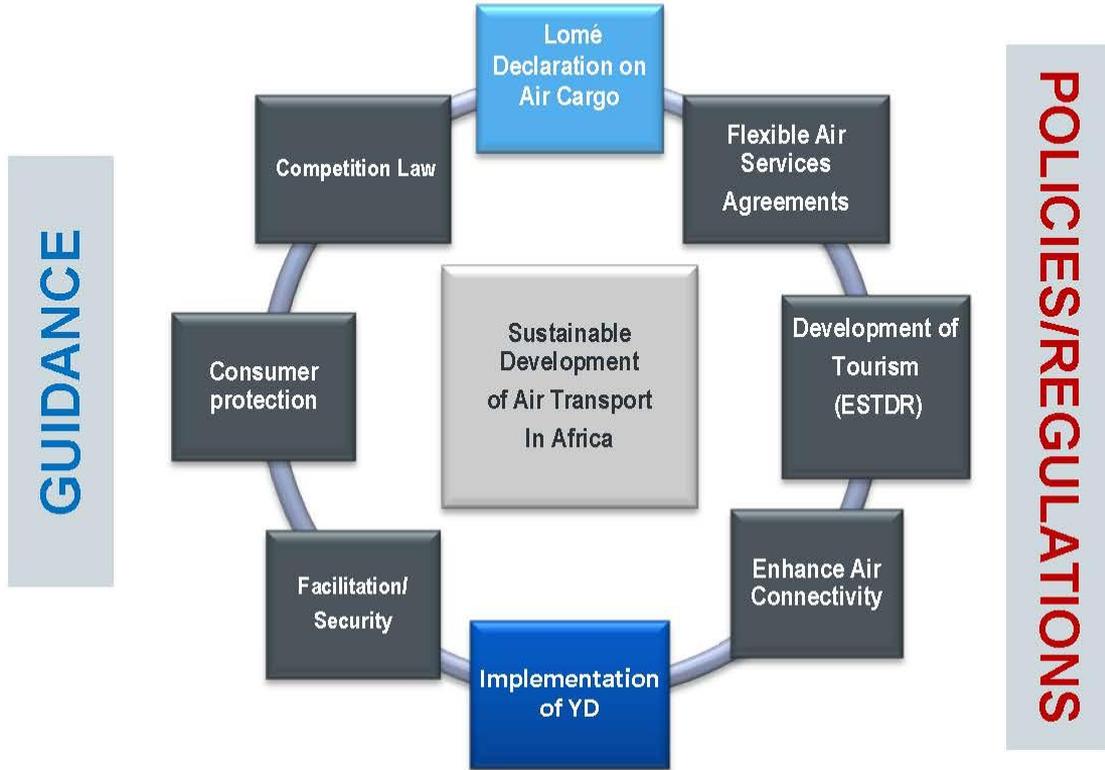
States & Regional Bodies



THE MADAGASCAR DECLARATION

Regulatory framework

ICAO



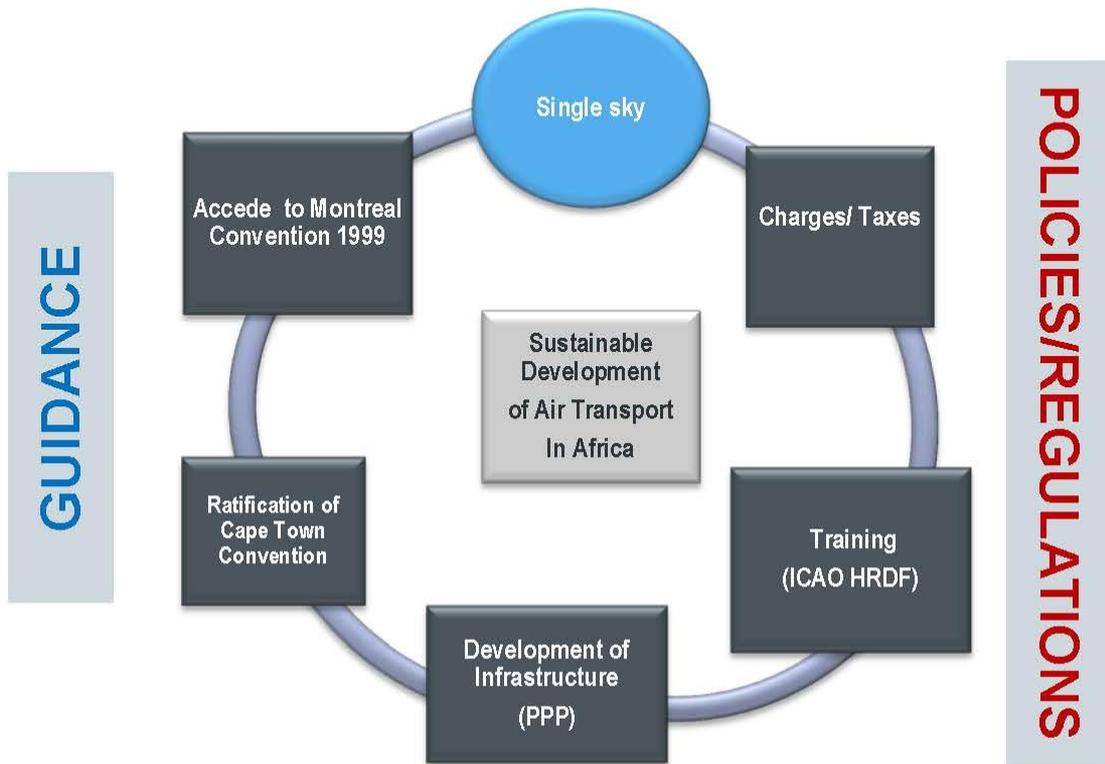
States & Regional Bodies



THE MADAGASCAR DECLARATION

Regulatory framework

ICAO



States & Regional Bodies



The Implementation Agencies

- ❖ Member States,
- ❖ African Civil Aviation Commission (AFCAC), Regional Organizations,
- ❖ African Airlines Association (AFRAA),
- ❖ Other Stakeholders including Tourism organizations, and
- ❖ Support of ICAO





ICAO's SUPPORT FOR:

MADAGASCAR DECLARATION

Meeting on the Sustainable Development of Air Transport in Africa



Date: 25 -27 March 2015
Location: Antananarivo, MADAGASCAR
Venue: Hotel Carlton
Registration: Registration Open



LOME ACTION PLAN





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ICAO'S Expectations

Cooperation of all Stakeholders



- ❖ States should implement the declarations and complete ICAO's SATAPS when operational
- ❖ AFCAC and AFRAA should continue to support States





ICAO's Activities Supporting Implementation

❖ Safety

- No country left behind initiative
- Promotion of ratification of Cape Town Convention/Protocol

❖ Training

- Initiate the Human Resources Development Funds (HRDF)

❖ Monitoring and Follow up

- Developed State Air Transport Action Plan System (SATAPs)
Metrix on implementation of the meetings.
- Liaising with relevant Stakeholders and sensitizing them on the implementation of the Declarations.





ICAO's Activities Supporting Implementation

❖ Consumer protection:

- Foster regulatory convergence through the adoption of core principles.
- Promote the ratification of Montreal Convention of 1999

❖ Facilitation/Security:

- ICAO TRIP Strategy.

❖ Competition Laws:

- Facilitating exchange of best practices.
- Compendium on competition policies and practices

❖ User charges and Taxation:

- Promote the use of ICAO guidance materials
- Study on the impact of taxes on air transport.





ICAO's Activities Supporting Implementation

❖ **Market access liberalization:**

- Development of long term vision for liberalization of international air transport.
- International agreements (including for cargo services) for Liberalization

❖ **Air carrier ownership and control:**

- International agreement to liberalize the current restrictions

❖ **Infrastructural and Intermodal transportation**

- Use of Aviation system block upgrades (ASBUs):
- Conducted studies on Public Private Partnership.





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Action by the Conference



❖ The AFI DGCA/6 Meeting is invited to:

- a) support ICAO's work for Economic Development of Air Transport;
- b) Urge States to implement the Lomé Declaration and the Antananarivo Declaration;
- c) Urge States to implement the Resolutions of A39
- d) To actively participate in the Second Meeting on Air Cargo Development in Africa to held in Addis Ababa, Ethiopia in April 2017, and also to the second Meeting on the Sustainable Development of Air Transport in Africa to be held in Accra, Ghana, in March 2017
- e) encourage contributions to the voluntary Air Transport Fund.



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谢谢, Xie Xie

Thank You

شكرا, Shukran

Merci

Спасибо, Spasiba

Gracias