



SAFE SKIES.  
**SUSTAINABLE FUTURE.**

Twelfth North American, Central American and Caribbean Directors of Civil Aviation Meeting (NACC/DCA/12)

**P/11 Agenda Item 8**

**Air Transport Updates**

Presented by the Secretariat

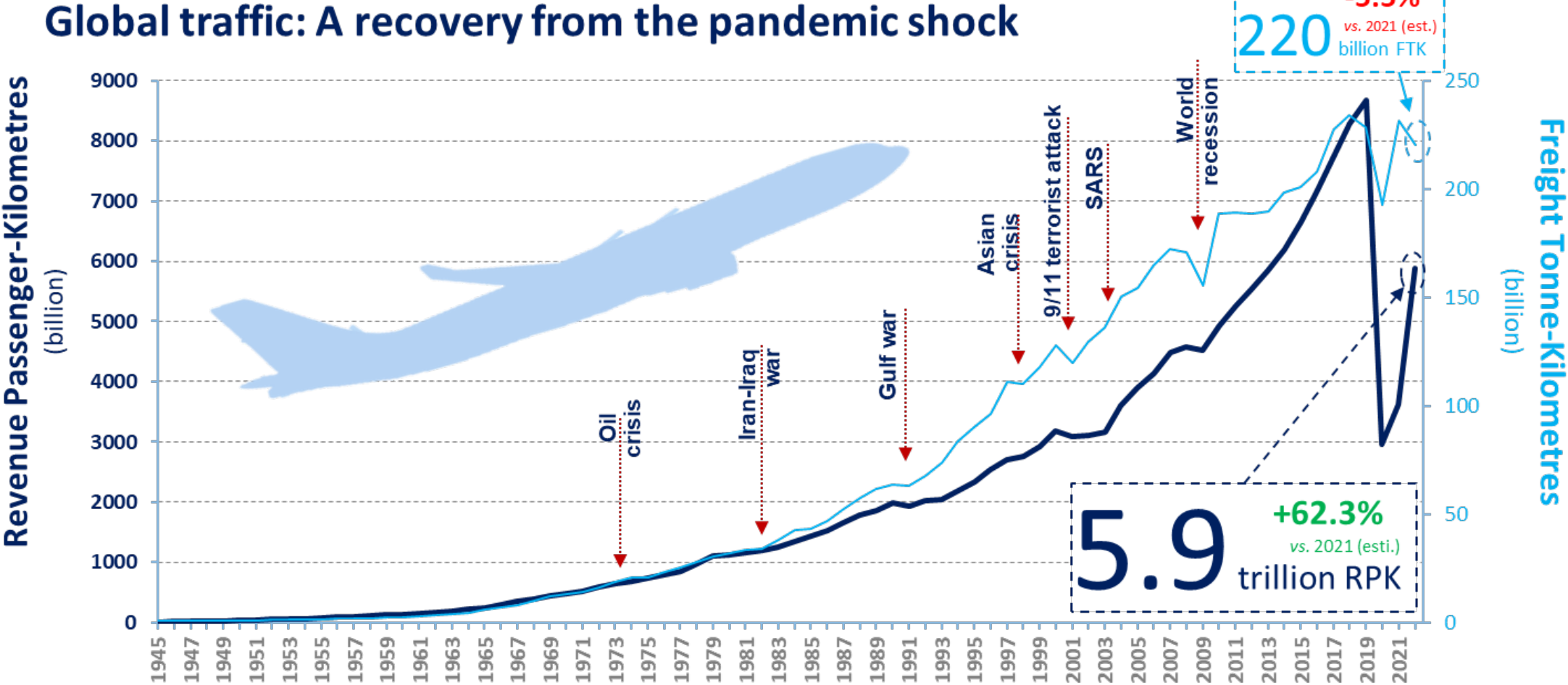
# Air Transport Updates

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**TWELFTH NORTH AMERICAN, CENTRAL AMERICAN AND CARIBBEAN  
DIRECTORS OF CIVIL AVIATION MEETING  
(NACC/DCA/12)**

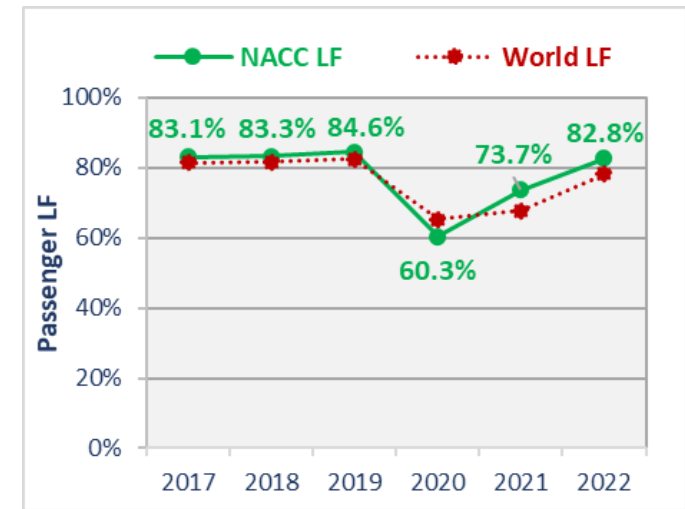
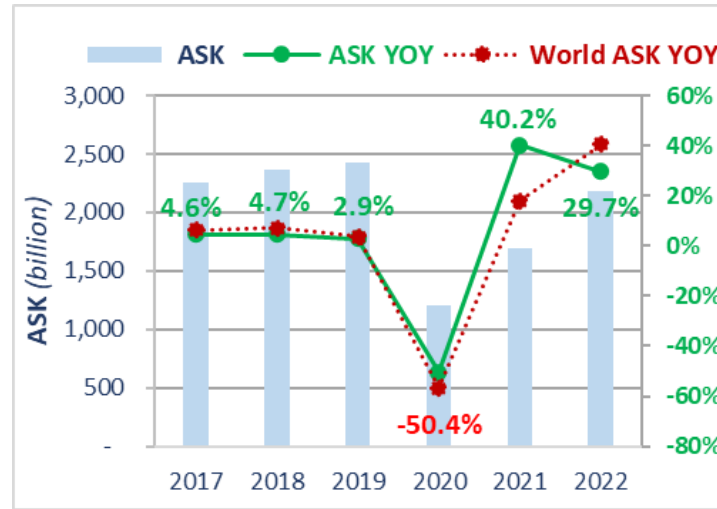
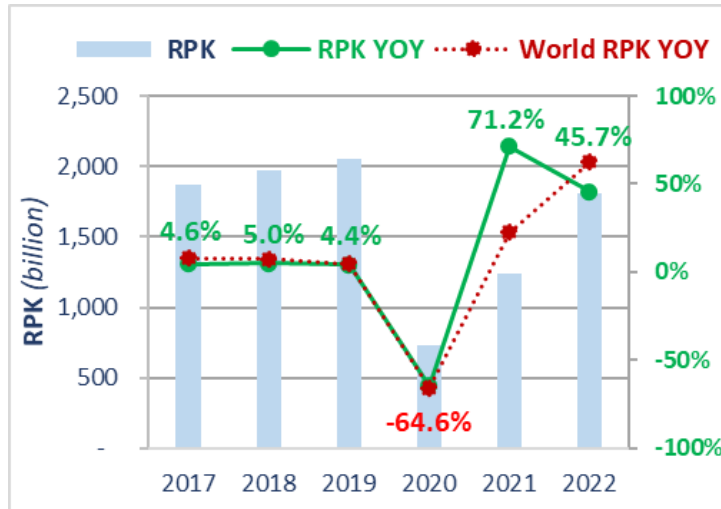
**International Civil Aviation Organization (ICAO)**

# Global traffic: A recovery from the pandemic shock



Source: Presentation of Air Transport Statistical Result

# NACC Passenger Traffic

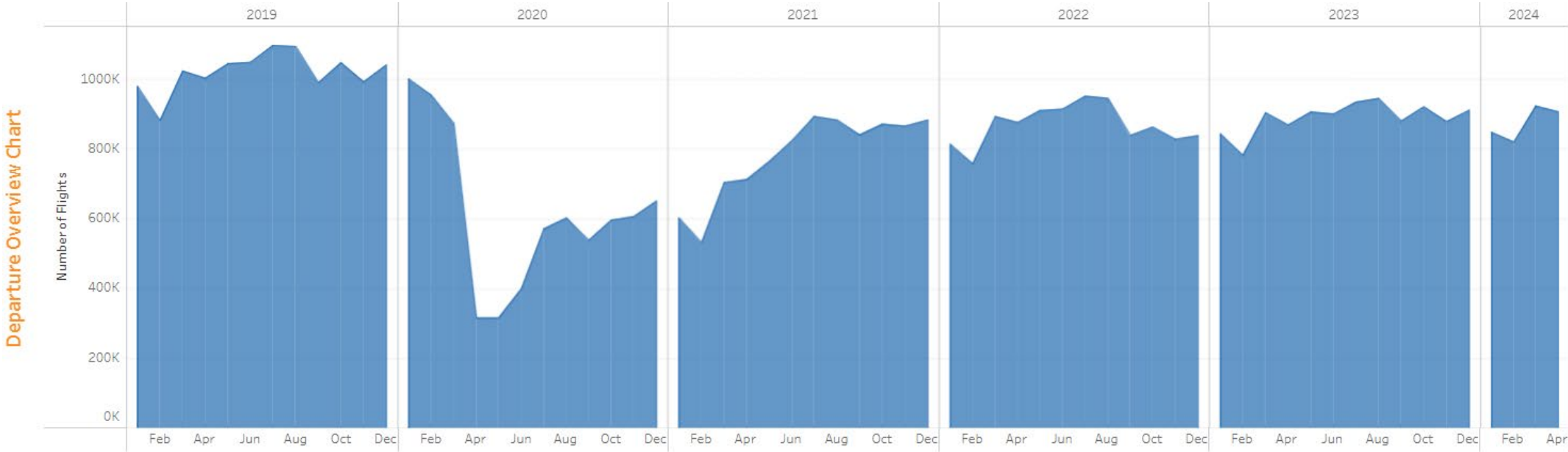


- Passenger traffic in Revenue Passenger-Kilometres (RPKs) increased by 45.7% in 2022.
- Passenger traffic increase rate is lower than the world average.

- Seat Capacity in Available Seat-Kilometres (ASKs) increased by 29.7% in 2022.
- Capacity increase rate is lower than the world average.

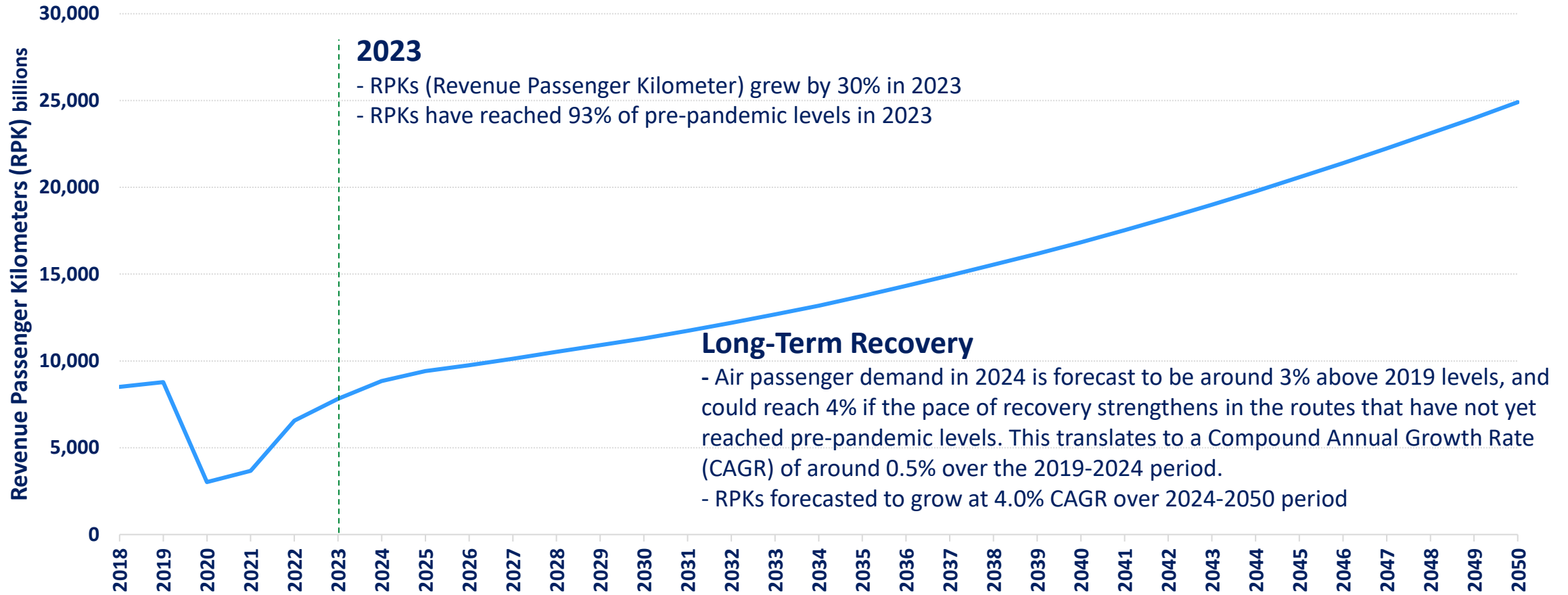
- Passenger load factor increased to 82.8% in 2022.
- Passenger load factor outpaced the world average.

# Total Number of flights from NACC States 2019-2024 5



- Gradual recovery after the pandemic in NACC.
- 90% recovery in departures from Jan-April 2024 compared to the same period in 2019.

# Global Long Term Traffic Forecast (RPKs)



Source: ICAO Long Term Forecasts

# Air Transport Policy and Regulation

# ICAO's Long-term Vision for International Air Transport Liberalization <sup>8</sup>

✈ A41 - "Urges all Member States to give regard to, and apply, the **ICAO Long-term Vision for International Air Transport Liberalization** in policy making and regulatory practices"





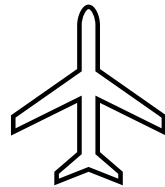
# Ongoing works by the Air Transport Regulation Panel (ATRP)

✈ ATRP/17 was held from 16 to 18 April 2024



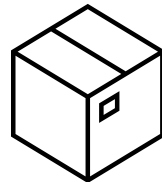
## Benefits and challenges of liberalization and barriers to opening markets access

- Efforts on the liberalization of market access should take into account the outcome of a survey among Member States be pursued after a systematic analysis of possibly hindering factors, including political (un)willingness, protectionism, and other non-technical areas, rather than by means of a comprehensive multilateral instrument in the near term, although it can remain as a long-term objective



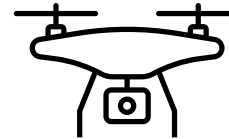
## Airline ownership and control

- Address the remaining issues of concern on draft Convention on Foreign Investment in Airlines



## Liberalization of air cargo

- Examination of whether there is a need for a specific agreement to further liberalize air cargo services



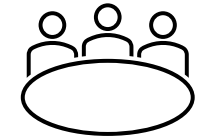
## Unmanned aircraft

- Examination of whether there is a need to develop guidance for economic regulation of international operations of unmanned aircraft



## Response to crisis

- Develop guidelines to temporarily respond to international crises, whilst protecting the integrity of Air Services Agreements (ASAs)



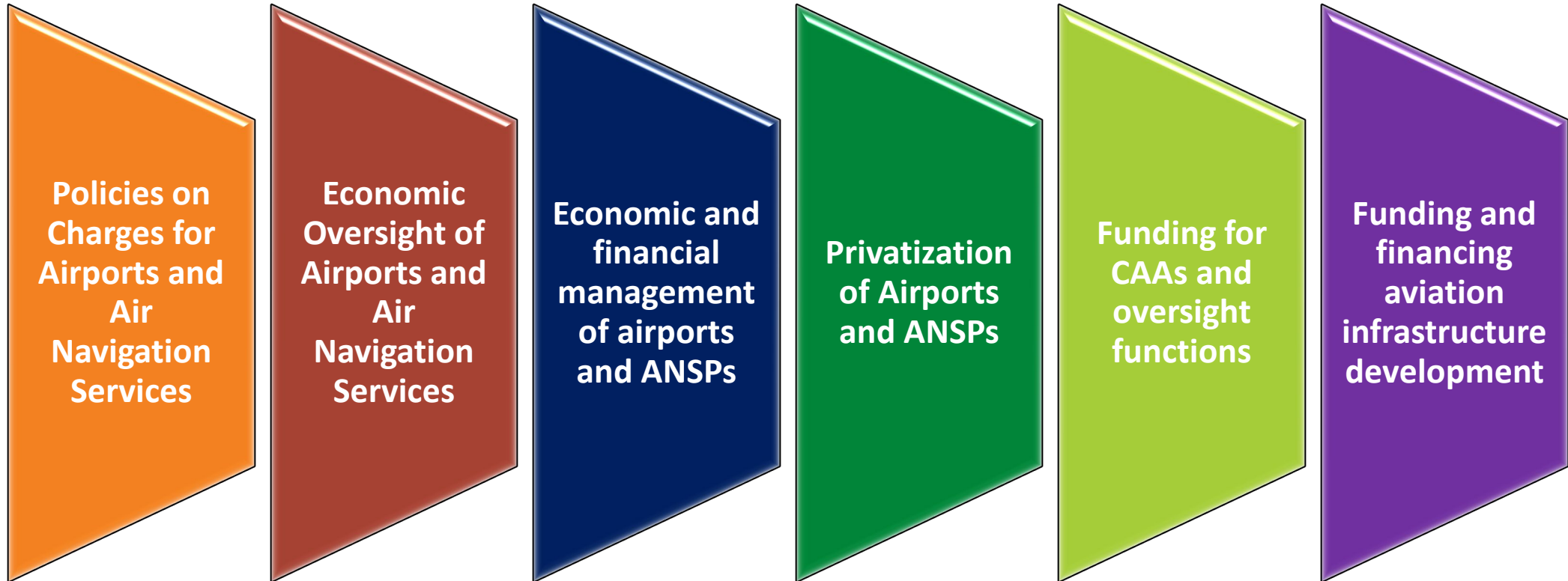
## Article 15 of Chicago Convention

- Ensure that Article 15 of the Convention is fully respected

# Aviation Infrastructure Management

# Aviation Infrastructure Management

Promoting the efficient development of aviation infrastructure



# Ongoing Activities of the Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP)

## Recommendations of the Ninth Joint Meeting of AEP-ANSEP

Charging policies	Article 15 of Chicago Convention	Enhance the implementation of ICAO policies	Sustainable funding for CAA	Funding for UAS, AAM	Cost recovery of MET services	Invoicing of air navigation service charges	Economic oversight of transnational airports
<ul style="list-style-type: none"><li>• Update of ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082)</li><li>• Definitions for the key charging principles</li></ul>	<ul style="list-style-type: none"><li>• Incorporate Article 15 in Doc 9082, particularly concerning the issue of fees and charges for granting access to airspace</li></ul>	<ul style="list-style-type: none"><li>• Global survey to assess the status and challenges faced by States</li><li>• Training and regional workshops</li></ul>	<ul style="list-style-type: none"><li>• Global survey on sustainable funding for oversight functions</li></ul>	<ul style="list-style-type: none"><li>• Economic aspects and potential funding mechanisms for UAS and AAM</li></ul>	<ul style="list-style-type: none"><li>• Collaborate with METP to address cost recovery for MET services</li></ul>	<ul style="list-style-type: none"><li>• Guidance on invoicing air navigation services charges</li></ul>	<ul style="list-style-type: none"><li>• Economic oversight of airports owned by foreign entities</li><li>• Standalone document of "black swan" events</li></ul>

# Aviation Data and Analysis

# The Fourth Meeting of the Aviation Data and Analysis Panel (ADAP/4)

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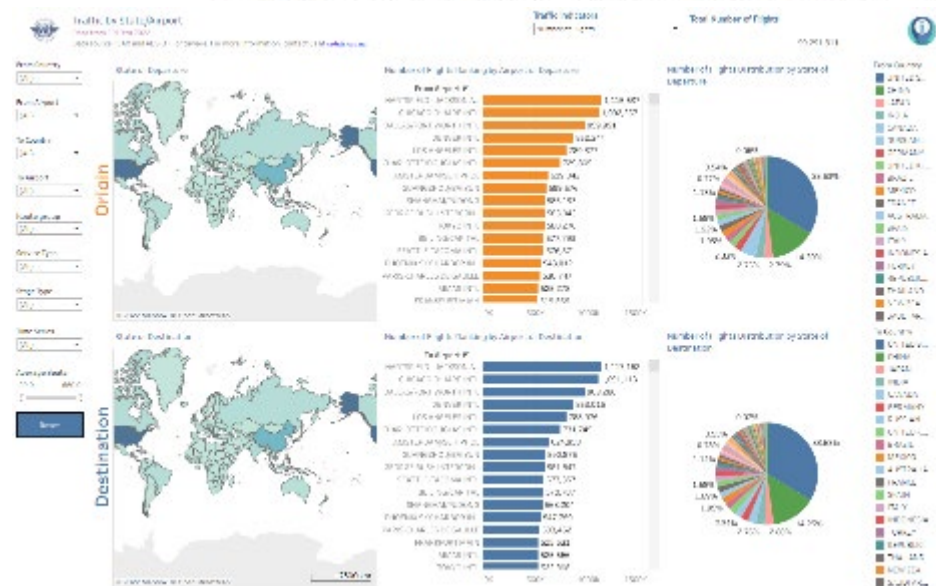
✈ At ICAO Headquarters in Montréal from 5 to 8 September 2023

## Agenda items:

1. Report on the outcome of the 41st Session of the Assembly
2. Report on the Eleventh Session of the Statistics Division (STA/11)
3. Presentation of the Aviation Satellite Account (ASA) methodological framework
4. Review the methodologies and reporting with respect to the ICAO statistics programme
5. Development of methodologies to collect, process and analyze Big Data
6. Update of the long-term traffic forecasts
7. Examination of a proposed Global Aviation Competitiveness Index
8. Report of the on-going collaboration with the Universal Postal Union (UPU)

# ICAO Traffic and Economic Dashboards

- ✈ Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**.
- ✈ Covering a **wide array of analytics**:
  - operations;
  - fleet usage;
  - passenger carried;
  - Flight Information Region (FIR) traffic;
  - revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity.
- ✈ Each Member States has been provided with a free license.



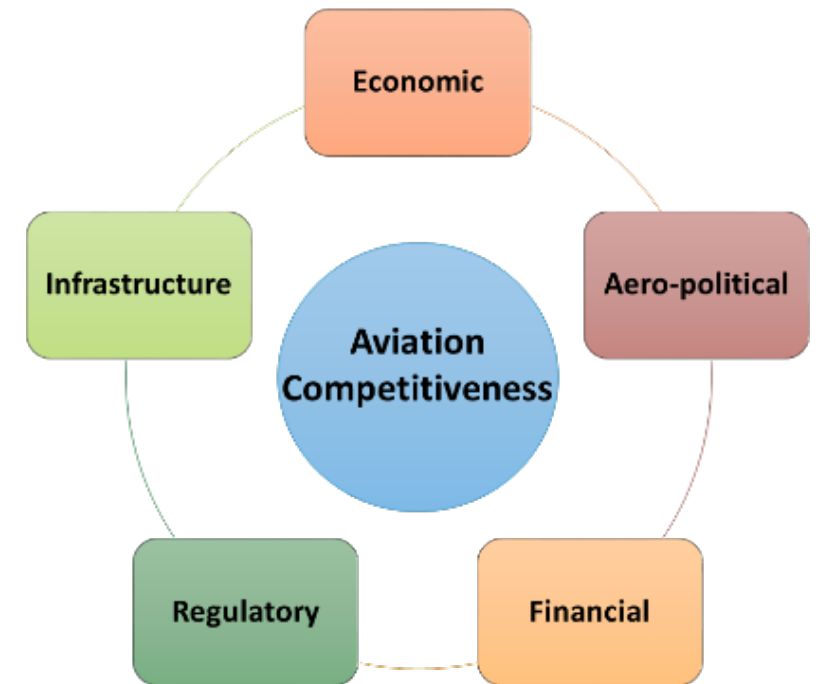
# Development of Global Aviation Competitiveness Index (GACI)

## Objectives

- ✈ The Global Aviation Competitiveness Working Group (ACWG) agreed that the objective of the competitiveness index is **to measure the performance of the aviation of a State and its ability to create and maintain value from the sector.**

## Progress

- ✈ **5 basic pillars** of the index were determined.
- ✈ Detailed indicators and metrics were determined by ADAP/4.
- ✈ The results of GACI will initially be disseminated at the regional level.
- ✈ Latest in-person meeting was successfully held at ICAO EUR/NAT Regional Office in France, in May 2024.



**5 basic pillars**



# ICAO's support to States

# ICAO's capacity building support to States

## Online training

Air Transport Regulation online course

Air Transport Regulation Issues online course

Air Transport Economics online course

Air Transport Economics for Airport Professionals online course

## Classroom/Virtual training

Joint ICAO-ACI training on Airport User Charges

## Regional workshop/seminar

ICAO/LACAC NAM/CAR/SAM Capacity Building Workshop on Economic Regulation and Oversight



Thank You!