



**Address by the President of the Council of the
International Civil Aviation Organization (ICAO),
Mr. Roberto Kobeh González,
to the 2012 China Civil Aviation Development Forum**

(Beijing, China – 23 May 2012)

“Global Aviation Trends and Key Areas for Cooperation”

Ladies and gentlemen, it is an honour for me, on behalf of the Council and Secretary General of the International Civil Aviation Organization, to be given the opportunity to address you today on the topic of ‘Global Aviation Trends and Key Areas for Cooperation’.

Let me begin by highlighting that the China Civil Aviation Development Forum has served, since 2007, as a key focal point for new insight into how your region can cooperate more effectively on its aviation challenges.

Chairman Li Jiaxiang and his team deserve considerable appreciation for organizing this year’s event and supporting its important role in Asia-Pacific aviation development.

Given my topic today, and as Asia-Pacific aviation growth is one of the world’s most significant air transport trends at this time, a brief review of your region’s position relative to the global picture should provide us with an excellent starting point to this presentation.

As many of you are undoubtedly aware, the Asia-Pacific region already accounts for over 40 percent of global air cargo movements and 26 percent of world passenger travel, making it larger than the North American air travel market. By 2014, your region is forecast to represent over 30 percent of all air travel globally.

As China is our host for today’s proceedings, I would also like to note that it is projected that a staggering 450 million passengers are expected to travel in 2015, an increase of 50 percent from 2011.

In order to be able to manage such numbers, China has already taken steps to develop its infrastructure and, by the end of 2012, the total number of transportation category airports should reach 230, which represents 50 new airports if compared to 2011.

Similar rates of growth region-wide represent a tremendous success for the Asia-Pacific and a very positive development for the global air transport community. They are also a tribute to the continuing dedication of many of you in attendance here today.

To put Asia-Pacific’s near-term growth in a broader context, ICAO’s current projections indicate that no other region in the world will achieve a higher level of growth than Asia-Pacific between now and 2020.

Somewhat comparable levels will be seen in Latin America, the Middle East, and to a partial extent Africa, while European and North American expansion will be substantially more modest over this period.

Looking further still to 2030, and considering the global picture, ICAO projections currently point to passenger totals more than doubling by 2030, likely exceeding 6 billion per year. The number of aircraft departures will also double over this period, to well over 50 million a year.

In light of these very impressive figures, there is no doubt that air transport growth is the clearest and most important trend for the entire air transport community. This in turn leads us to consider some of the most important areas where the aviation community will need to cooperate even better than it does today, which is a considerable challenge.

The first of these areas is safety, which remains ICAO's guiding Strategic Objective.

Though air traffic growth is in every instance a sure sign of increased mobility and prosperity, it can also lead to safety threats when it outpaces the air navigation and regulatory developments needed to support it.

Recognizing the complementary links between air transport safety and air navigation efficiency, ICAO is presently coordinating its revisions to the Global Aviation Safety Plan and Global Air Navigation Plan to help Member States and industry stakeholders collaborate more effectively and complementarily in these highly inter-related domains.

In the safety area specifically, the new Global Aviation Safety Plan will provide high-level policy guidance to the Regional Aviation Safety Groups which have recently been established by ICAO in all world Regions.

In fact, the first meeting of the ICAO Asia-Pacific Regional Aviation Safety Group was already held in October of last year.

Under the new strategic approach, ICAO is proposing that these Regional Groups oversee the annual safety-related implementation, monitoring and reporting activities pursued collaboratively by States, Regional Safety Oversight Organizations and industry partners.

This role will be essential to effectively defining tactical safety targets and work programmes on an annual basis.

It will also allow consolidated safety monitoring and reporting data to be delivered for collaborative analysis by ICAO and its aviation partners, including IATA, ACI, CANSO, pilot and controller associations, and others.

To aid in the more effective and transparent collecting and sharing of safety data, a crucial element of the State Safety Programmes being implemented by States and the Safety Management Systems put in place by operators, ICAO has established new online tools such as the Global Safety Information Exchange.

As we consider these new safety-related developments, please also recall that 2011 was the safest year on record for global aviation. I applaud your region's contribution to that success, but would stress at the same time that safety is one area where we can never do enough.

As I mentioned earlier, ICAO's safety improvement efforts are now being coordinated more closely than ever before with our strategic planning on air navigation modernization.

It is presently projected that \$120 billion will be required globally to implement the required upgrades to the global Air Traffic Management (ATM) system over the next few decades. These upgrades are essential to provide the capacity needed to safely manage projected growth, not to mention providing significant emissions reductions.

ICAO will therefore be proposing a flexible, transparent strategy within its new Air Navigation Plan that will provide States and operators with an unprecedented level of investment clarity as they assess their local ATM and avionics needs. The cooperation of States and air navigation service providers in this process is essential.

Called the Aviation System Block Upgrade strategy, it will organize the technologies and procedures States will need based on your specific airspace characteristics and requirements. It will also define flexible upgrade timelines for each set of upgrades, ultimately leading to a globally-harmonized, safer and more efficient air transport network.

Security, of course, is another very important area of strategic concern for ICAO and its Regions. It also provides further excellent examples of how cooperation is helping the air transport community achieve notable improvements. In this connection, we may recall that China successfully hosted a diplomatic conference in Beijing in 2010, which adopted the Beijing Convention and Beijing Protocol. On behalf of ICAO, I would like to once again thank the Government of China for taking this important initiative which will have far-reaching significance in strengthening the legal framework for aviation security. These two legal instruments criminalize a number of acts against civil aviation, particularly the acts of the masterminds who are behind major terrorist attacks. The ICAO Assembly has called upon all States to ratify these two instruments as soon as possible.

New developments to harmonize security and facilitation through advanced checkpoint technologies are currently being pursued between ICAO and several industry partners. This work builds on the excellent progress the Organization has made over the past decade in the area of travel document modernization.

A new supply chain security requirement was also included in recent Amendments to Annex 17 – a move by ICAO which has been praised by industry stakeholders as proactive based on currently perceived threats. Cooperation with the World Customs Organization and other bodies are all helping to resolve jurisdictional matters in this regard and continue progressing this initiative.

Lastly where security is concerned, ICAO is actively building consensus among Member States on critical priorities and issues in preparation for the High-level Conference on Aviation Security, to be held this coming September in Montréal.

ICAO's approaches to environmental protection similarly benefit from consultative processes driving mutually-beneficial solutions.

Member States have recently adopted global aspirational goals of 2 percent annual fuel efficiency improvement up to the year 2050, as well as the stabilizing of CO₂ emissions at 2020 levels.

At their request, we are moving aggressively to coordinate the development and wider use of sustainable alternative fuels for aviation and the development of a global CO₂ certification standard for aircraft by 2013.

ICAO is also working together with Member States on action plans to help them identify how they can reduce aviation CO₂ emissions and the types of assistance they will need to do so.

We are in the process of defining a global framework and scheme for market-based measures in international aviation, as well as a host of other measures to reduce the impact of aviation on the environment and, as requested, will report back to States at the 38th Session of the ICAO Assembly next year.

Still in a spirit of global cooperation, we are closely monitoring the work of the United Nations Framework Convention on Climate Change to ensure that international aviation is not singled out as a source of revenue in a disproportionate manner.

In all of these areas of strategic priority, a common concern across all disciplines remains the availability of skilled personnel to support the safe and effective expansion of every aspect of the air transport system over the coming decades.

This issue has many components including recruitment strategies, domestic education policy, employee retainment, and many others. Training will also play a very significant role in this regard.

ICAO has therefore begun to bring training, education and operational stakeholders together within the objectives of its Next Generation of Aviation Professionals initiative, in addition to advancing new training certification guidelines globally through its TRAINAIR PLUS programme.

To support the sustainable development of air transport, ICAO continues to develop measures designed to streamline existing airline operations, improve productivity and reduce costs.

Improved competition has had, and continues to have, a positive net effect on air transport efficiency and availability in every market where it has been applied.

This fact is reflected in how the Asia-Pacific region is presently advancing its market priorities through the collaborative 2012 Air Transport Integration Project, overseen through the auspices of the Association of Southeast Asian Nations.

The global community encourages this project's timeline and its goals of sustainable economic growth and the integration of markets.

As we jointly proceed with liberalizing the industry here and globally, I would encourage you to remain mindful of excessive consolidation. The monopolizing of commercial systems should not become a defining characteristic of the global air transport system.

I would like to end today by stressing that, as the world's nexus for air transport discussion and progress, the enhancement and facilitation of cooperation between States and air transport stakeholders is ICAO's most fundamental mission.

This purpose was defined for us in the *Convention on International Civil Aviation* almost seven decades ago, and it has only been reinforced by every political, operational and technological air transport development since that time.

As we move ahead together toward our inter-related regional and global air transport objectives, I encourage you to recall that the international aviation system is perhaps our greatest example of how our separate States and cultures can unite around a common purpose and develop mutually-beneficial solutions to the world's problems.

The complex legal, political, technical and operational framework that supports the flight of every aircraft from every runway in the world is a truly remarkable human achievement.

It is an achievement which we all share as our sector continues to foster economic and social development and prosperity in every corner of the world.