



**ICAN
2009**



**ICAO Air Services Negotiation Conference
28 September to 2 October 2009**

Istanbul, Turkey



An overview of global trends and developments and ICAO's related work

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Background

- Evolution of air transport regulation
 - liberalization, bloc negotiations, regionalism...
- Evolution of business practices
 - globalization, privatization, alliances...



Liberalization



Re: Liberalization

- Develop in a stable, efficient and economical manner without compromising safety and security
- Participation of all States in the international air transport system
- Liberalize at State's own choice and own pace



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Liberalization - a global trend

- National aviation policy
- **More States embracing liberalization**
 - Shift to negotiation of “open skies” ASAs
 - Market access for foreign airlines
 - Liberalized domestic markets



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Liberalization – a global trend

Bilateral liberalization

➤ **Bilateral air service agreements significantly liberalized**

- **Over 1000 agreements**

- ✱ **70% with liberalization measures**



Bilateral "Open-Skies" Agreements



Non-Open skies

➤ June 2009

- Sudan – United Arab Emirates

➤ August 2009

- Singapore - Peru

Liberalization - a global trend

Regional liberalization arrangements



Caribbean ***Europe***
South America ***Middle East***
Africa

Asia/Pacific

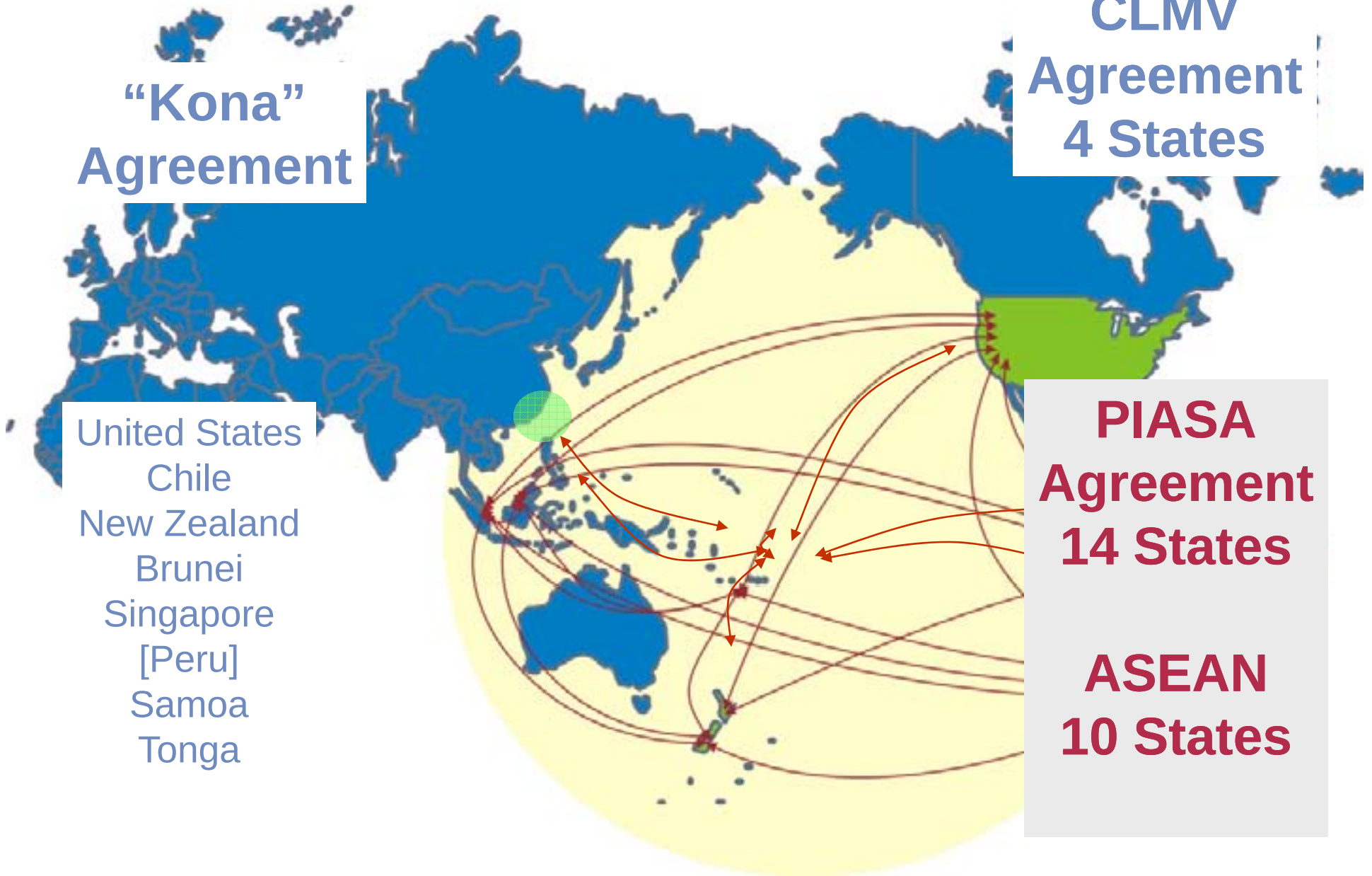
**“Kona”
Agreement**

United States
Chile
New Zealand
Brunei
Singapore
[Peru]
Samoa
Tonga

**CLMV
Agreement
4 States**

**PIASA
Agreement
14 States**

**ASEAN
10 States**



Intra-regional liberalization

- Euro-Mediterranean Aviation Agreement with Morocco
- EU – US Air Transport Agreement
- **EU – Canada**
- 37 “Horizontal” agreements

Multilateral Initiatives

- IASTA (129 Members)
- ATCONF/5 & A-36
- World Trade Organization
- Agenda for Freedom
- Draft Multilateral Convention



Some Major Industry Developments

- Global airline alliances
 - + 600 (3 mega alliances)
- Consolidation, mergers & equity investments
- Low-Cost Carriers (LCCs)

Role of ICAO

Focus of work since AT Conf/5:

**“Promote, Facilitate and Assist
States in the liberalization process”**



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14



Facilitating Liberalization

➤ Template Air Services Agreement



A "Living
document"



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Facilitating Liberalization

- Studies (e.g. Safety implications, ESTDR)
- Databases on economic regulation
 - o Case studies on liberalization experience
 - o State Policies on ownership and control

➤ Database of the
World Air Services
Agreements
(WASA)

www.icao.int → site index

Assisting States

- Provide guidance and advice
- Provide a forum for States to exchange views and experience
 - o workshop, seminar, symposium
 - o Symposium on Air Transport Regulation and Infrastructure Management (South America)



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17



ICAN/2014

ICAO Air Services Negotiation Conference

ICAN/2013

ICAO Air Services Negotiation Conference

ICAN/2012

ICAO Air Services Negotiation Conference

ICAN/2011

ICAO Air Services Negotiation Conference

ICAN/2010

ICAO Air Services Negotiation Conference



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ICAO Air Service Negotiation Conference
24 to 27 November 2008

Dubai, United Arab Emirates

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