



ICAO

**Keynote address by  
the Council President of the  
International Civil Aviation Organization (ICAO)  
Mr. Salvatore Sciacchitano,  
to the 2023 Air Transport Symposium on:  
“Global connectivity challenges”**

*(19 March 2023, Montréal, Canada)*

*Distinguished friends and colleagues,  
Ladies and gentlemen,*

First of all, I wish to underline how important it is that we return to discuss “positively” air transport issues, including, as today, Global connectivity challenges, rather than aviation recovery after the COVID-19 pandemic. In fact, air transport is now recovering at a reasonable pace. Air traffic levels are now reaching 80 per cent of their 2019 levels, and in some regions even surpassing them. These are very encouraging indications, and we all hope to see the continuation of this positive development.

According to ICAO’s forecasts, air passenger demand in 2023 will rapidly recover to pre-pandemic levels on most routes by the first quarter and that growth of around 3 per cent on 2019 figures, would be achieved by year-end.

There are many lessons learned from the COVID-19 experience, in particular regarding the need to cooperate amongst all stakeholders in similar circumstances, in order to be better prepared for any new emerging crisis situation.

Regarding air connectivity, for ICAO the concept of air connectivity comprises the capacity of the air transport value chain to move passengers and cargo via a minimum number of transit points.

This understanding prioritizes shortest and most-direct-as-possible air transport connections, resulting in more affordable and sustainable operations and services, greater customer satisfaction, and diminished safety and security risks.

Throughout the modern air transport era, air connectivity has been beset by a diverse range of challenges and factors.

These have included, among others, restrictive market access, poor levels of national adherence to regional and multilateral agreements, restrictive airline ownership and control clauses between countries, tax and fee proliferations, and the effects of inflation on the costs of the essential services delivered by airport and air navigation providers.

To address these and other connectivity factors, notably as pandemic-related traffic restrictions continue to be lifted in many parts of the world, the air transport sector will be relying more

than ever on data-driven policy- and decision-making.

This reliable, accurate, and comprehensive data will be the key component permitting authorities worldwide to design flexible, scalable, and forward-looking national and regional aviation strategies, whether as part of their continuing post-pandemic recovery or to increase their system resilience for the longer-term.

ICAO has been embracing the latest data innovations through various projects and collaborations, and the challenges of the pandemic led to the secretariat developing advanced connectivity dashboards to support States' in their related decision- and policy-making.

As we continue to move forward taking advantage of the latest in our data tools and insights, the role that aviation innovation will be playing needs to be well understood to properly assess the need for new and more flexible aviation development frameworks.

This speaks to the fact that “building back better” will rely on us overcoming protectionist approaches, and opening the door on new liberalization efforts to help unlock all of aviation's socio-economic benefits.

ICAO is therefore progressing its work on the development of a Draft Convention on Foreign Investment in Airlines, and assessing the need for a specific international agreement to further liberalize air cargo services, in line with its existing Long-term Vision for International Air Transport Liberalization.

To encourage a balanced growth approach, which will support the industry in emerging stronger and more resilient post-pandemic, work is also ongoing under the relevant ICAO panels to address the economic viability and sustainability of airports and ANSPs.

We are also developing a standardized aviation competitiveness index for States, to help them measure and analyze the economic performance of their national sectors against global norms, and in turn assist policymakers in identifying areas for improvement or prioritization.

Additional efforts supporting system resilience includes the guidance we're developing for States to provide them with greater flexibility to temporarily respond to international crises. Countries need help facilitating the continuation of traffic during a crisis, and ensuring a return to normal afterwards, and in a manner that doesn't place the integrity and intent of existing air services agreements at risk.

The return to full air transport profitability and growth, which ICAO has now forecast to be achieved by the end of this year, is not simply a matter of leaving a pandemic behind us, but also of addressing some system and capacity challenges ahead of us.

Significant and sustainable investments in the modernization and expansion of advanced and high-quality aviation infrastructure will be required, and ICAO is continuing to prioritize related work to meet future capacity needs and provide the support States expect as they pursue the UN 2030 Sustainable Development Goals.

ICAO and other traffic forecasts have revealed quite clearly that aviation has a tremendous foundation of global travel demand to help support investments in air connectivity improvement, but quickening growth also importantly reminds us also that we must accelerate our collective efforts toward aviation carbon neutrality.

The appetite of our air transport customer base for lower emissions flight and route solutions will only be growing in the coming years, and it must therefore be appreciated that air transport sustainability progress represents not only a moral imperative we undertake on behalf of future generations, but also an economic competitiveness priority, which aviation operators ignore at their peril.

In closing today, I wish to underscore that what we understand today as air connectivity is set to be fundamentally redefined with the accelerating onset of autonomous and advanced air mobility aircraft, and with the wide-ranging new types of air transport products and services which some of these will be providing.

The “new normal” for this sector is going to be characterized by both new technologies and new mindsets, all of which challenge our legacy approaches on multiple levels, and there is therefore an onus upon all of us to establish the enabling frameworks for next generation air transport systems and business models.

This illustrates why aviation leaders will need to rely on equal parts ambition and imagination to succeed in such a rapidly evolving connectivity context, but I am reassured that these are traditional strengths of our sector, and that the leaders and experts joining us today are very much up to that task.

Thank you.