



| ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY



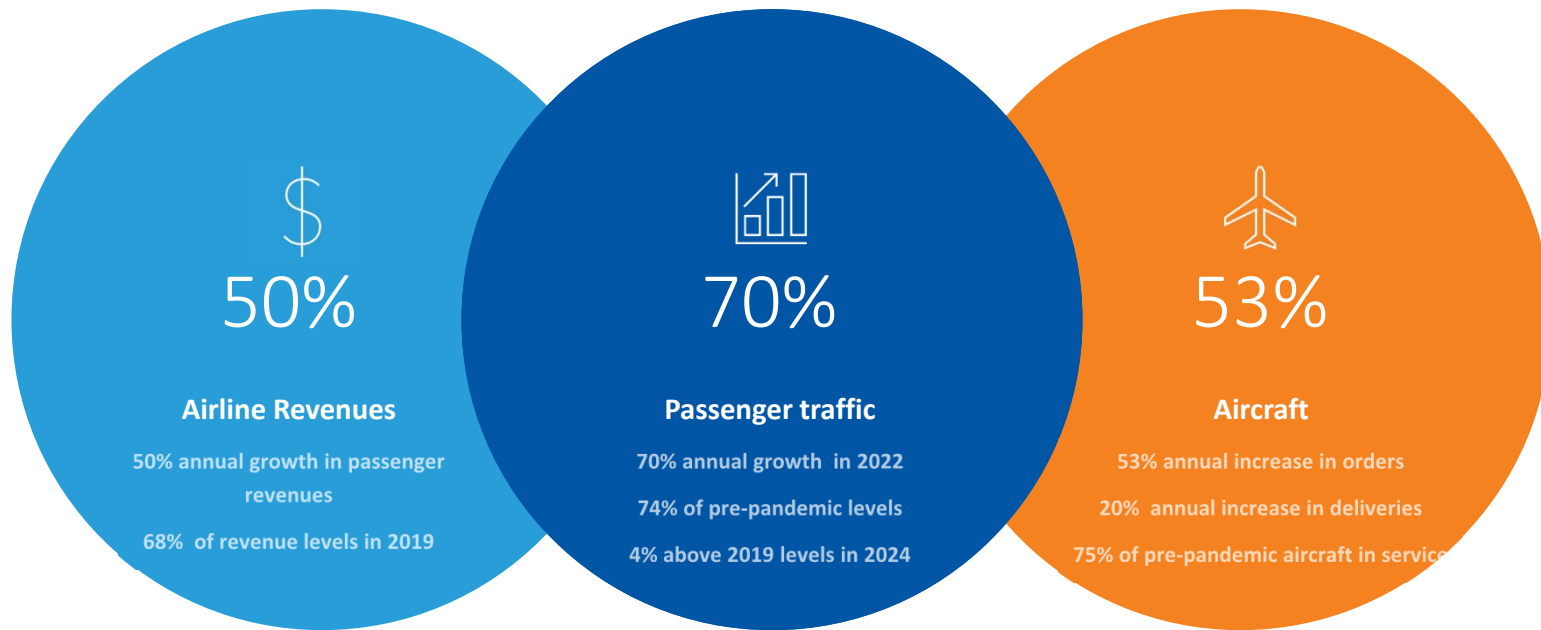
ICAO Forecasts & Development in Air Transport Regulatory Framework

—
The Seventeenth Meeting of Civil Aviation Authorities of the SAM Region
(SAM RAAC/17)

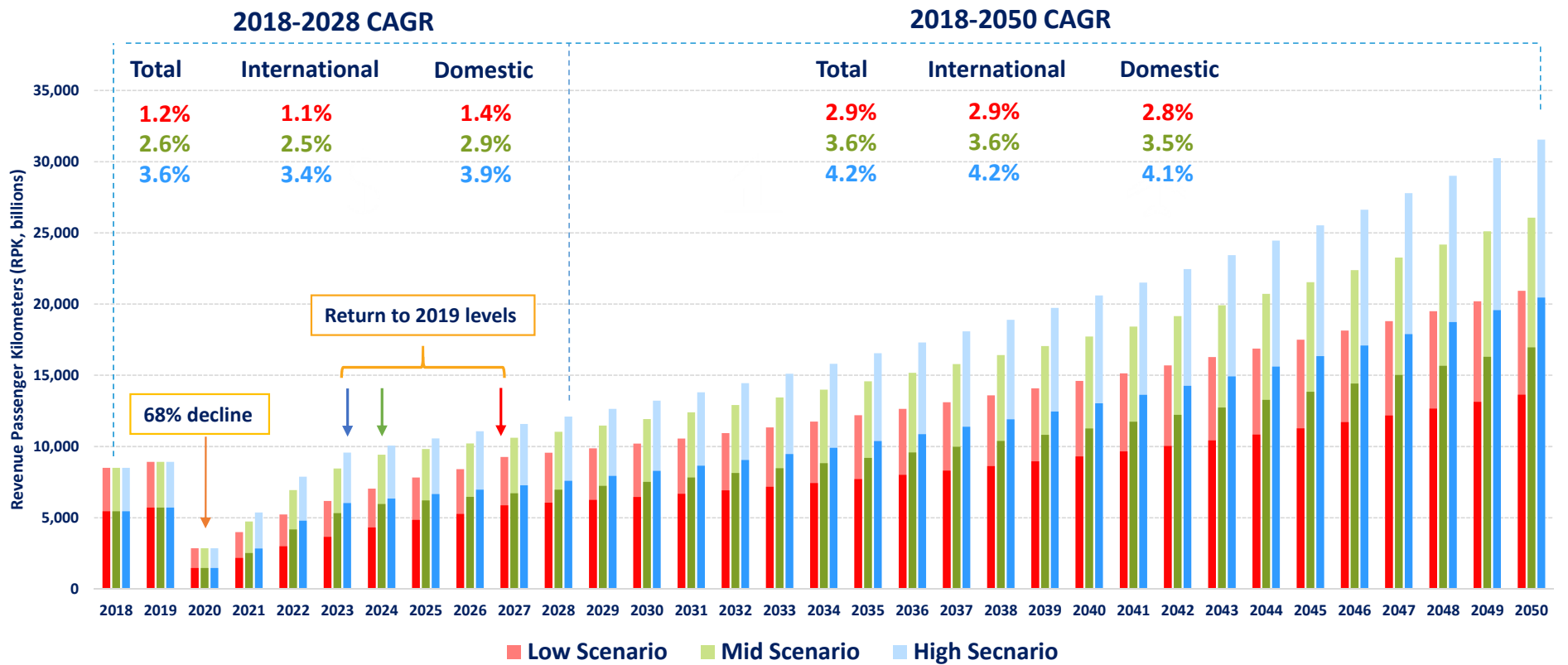
Mr. Mohamed Khalifa Rahma
Director, Air Transport Bureau
International Civil Aviation Organization (ICAO)

ICAO Forecasts

2022 Global Recovery overview

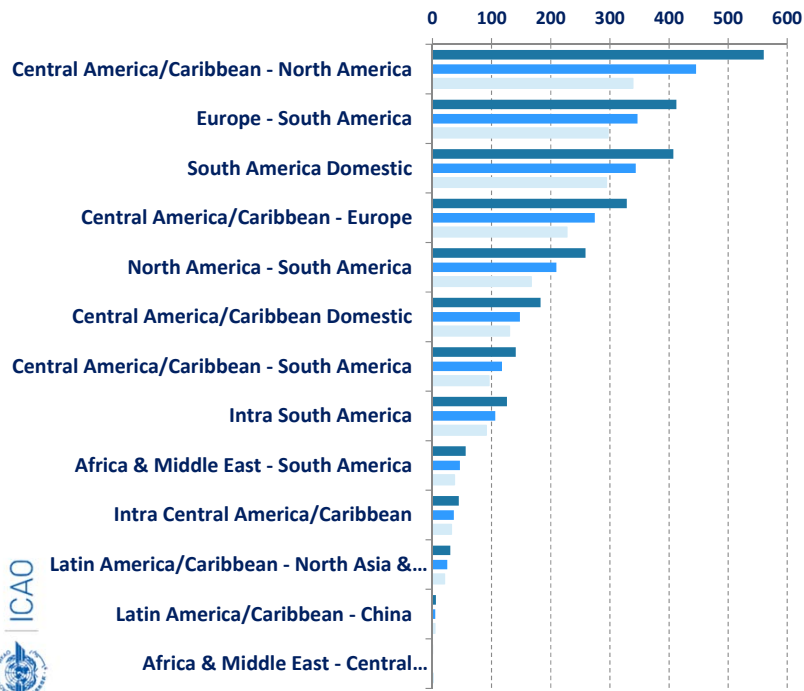


Global Long-Term Traffic Forecasts post-COVID19 (Passenger)

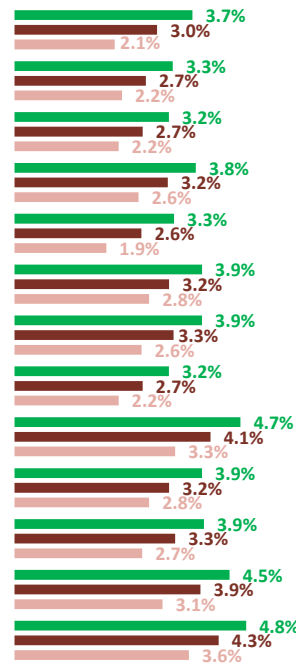


Latin America/ Caribbean

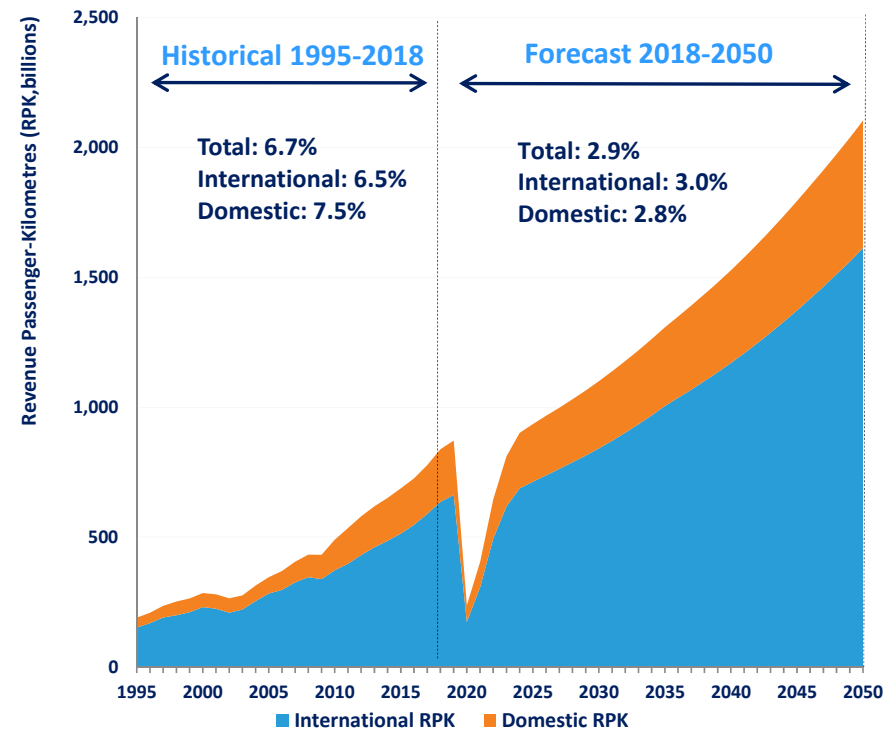
Revenue Passenger-Kilometres, 2050 (RPK, billions)



CAGR 2018-2050



Latin America/Caribbean (Mid Scenario)



■ High Scenario ■ Mid Scenario ■ Low Scenario

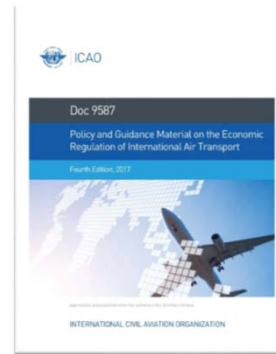
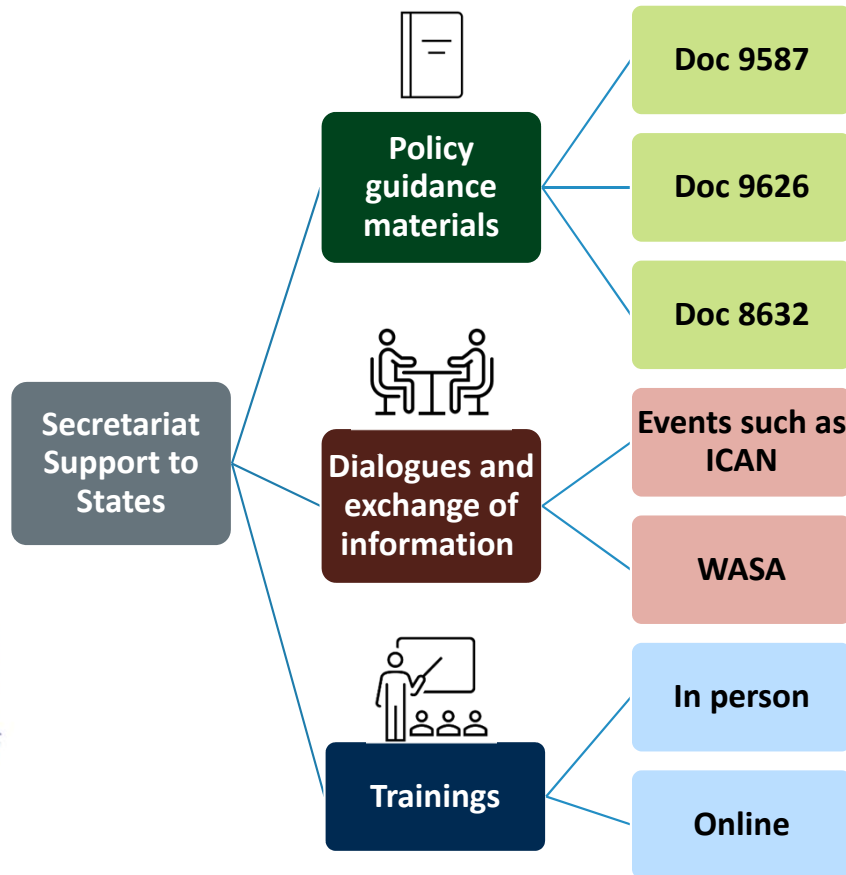
■ High ■ Mid ■ Low

■ International RPK ■ Domestic RPK

Air Transport Policy and Regulation

ICAO's Long-term Vision for International Air Transport Liberalization ⁸

✈ 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"



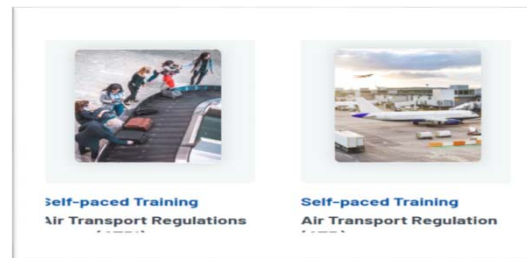
Doc 9587



Doc 9626



Doc 8632

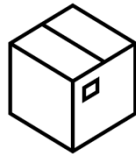


Ongoing works by the Air Transport Regulation Panel (ATRP)



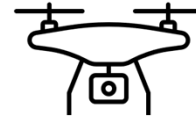
Airline ownership and control

- 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)

Competition laws and policies

✈ A41 - "Urges Member States to develop **competition laws and policies** that apply to air transport, taking into account national sovereignty and to consider ICAO guidance on competition"



Description

- Information on Member States and regional organizations' regulatory framework in the field of competition rules



Scope

- Competition laws
- Regulations and practices
- Cooperation in the field of competition



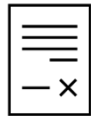
Coverage

- 193 Member States – **including all 13 SAM States**
- 3 regional organizations

Continous update

Consumer protection

- ✈ A41 - "Urges Member States that have not yet become parties to the **Montréal Convention of 1999** to give urgent consideration to so doing"
- ✈ A41 - "Urges Member States and concerned stakeholders to give regard to, and apply, the ICAO high-level, non-binding, non-prescriptive **core principles on consumer protection** in policy-making and regulatory and operational practices, including in case of massive disruptions impacting aviation, and to keep ICAO informed of the experience gained or issues encountered in their application"



Montréal Convention of 1999

- 139 Parties – **including 11 SAM States**



ICAO Compendium on Consumer Protection

- 193 Member States - **including all 13 SAM States**
- 4 regional organizations – **including LACAC**

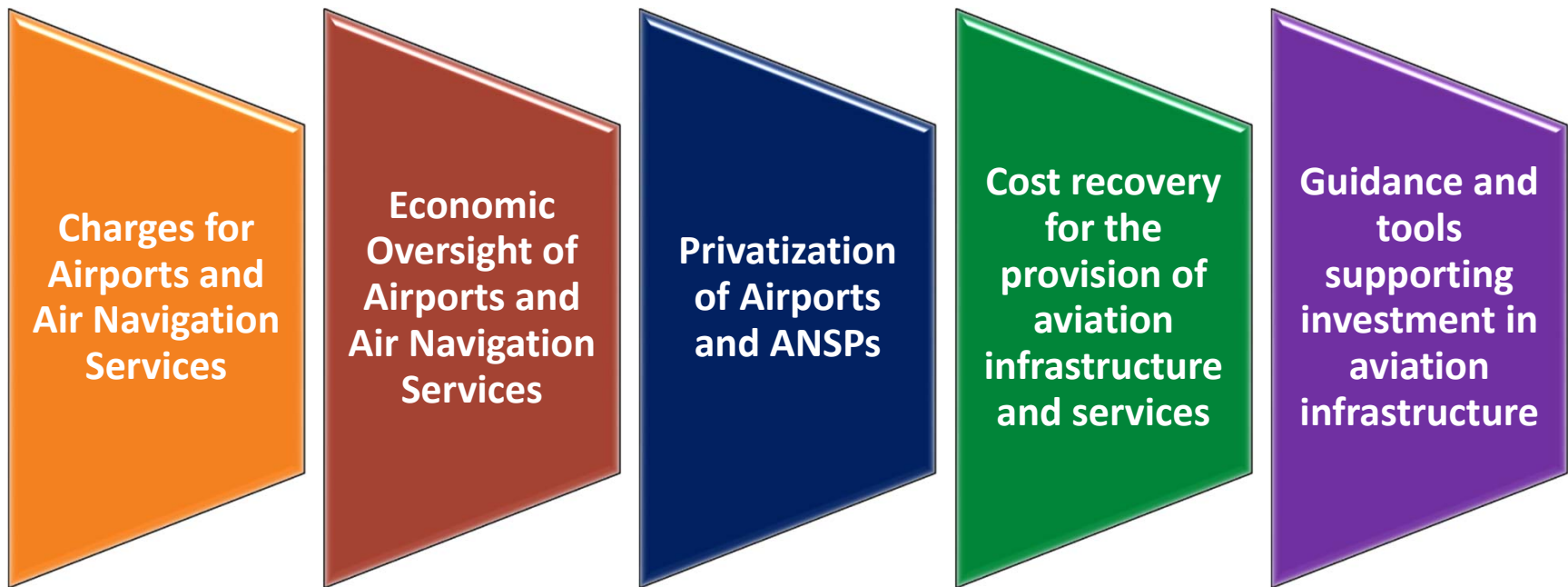


Compendia on Emergency Response Planning (ERP)

- 193 Member States - **including all 13 SAM States**
- States are encouraged to update the Secretariat

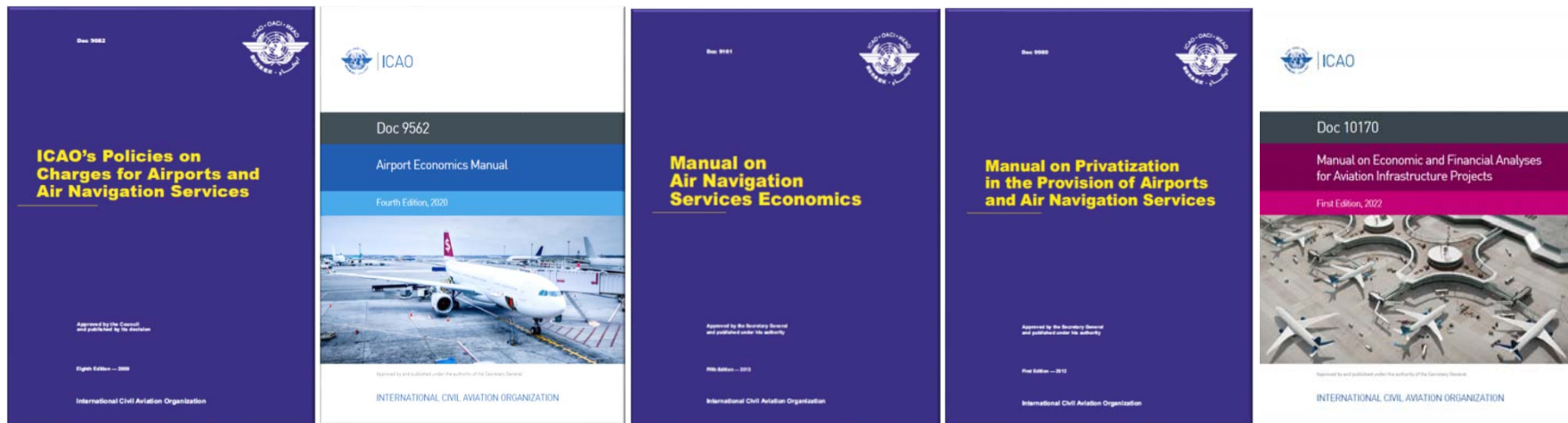
Infrastructure Management

Infrastructure Management



ICAO's Policies and Guidance

Harmonizing global regulatory framework by developing policies and guidance



Doc 9082

Doc 9562

Doc 9161

Doc 9980

Doc 10170

- **Doc 9082** – ICAO's Policies on Charges for Airports and Air Navigation Services
- **Doc 9562** – Airport Economics Manual
- **Doc 9161** – Manual on Air Navigation Services Economics

- **Doc 9980** – Manual on Privatization in the Provision of Airports and Air Navigation Services
- **Doc 10170** – Manual on Economic and Financial Analyses for Aviation Infrastructure Projects

Ongoing Activities

Outcome of the Eighth Joint Meeting of the Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP/8)

- ✈ Virtual panel meeting held from 29 November to 3 December 2021
- ✈ Review of ICAO's policies on charges for airports and air navigation services
- ✈ Economic impact of COVID-19 on airports and air navigation services
- ✈ Guidance on cost recovery for the provision of MET services and space weather information
- ✈ Potential funding and financing for supporting the UAS operations
- ✈ Sustainable funding for CAAs and oversight functions
- ✈ New guidance and tools to support investment decisions of financing aviation infrastructure

Opportunities

Solid recovery of air traffic from the COVID-19 pandemic

Continued traffic growth of the region

Ongoing liberalization efforts

Challenges

Infrastructure deficiencies

Excessive charges and taxes on air transport

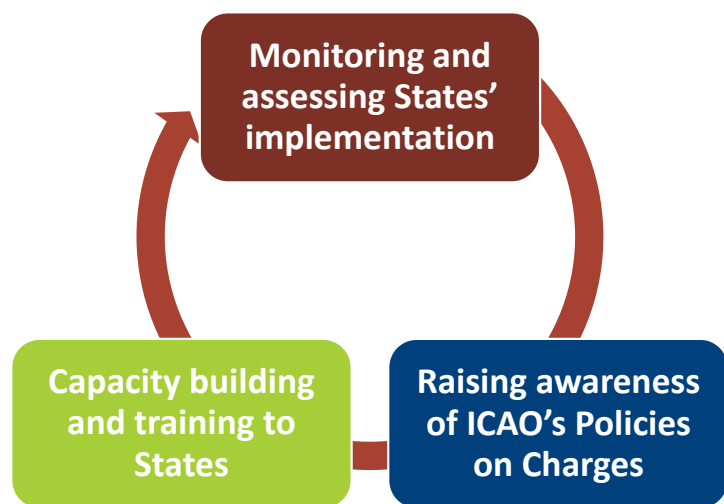
Proliferation of tourism taxes in the region

Economic contribution of aviation in Latin America/Caribbean

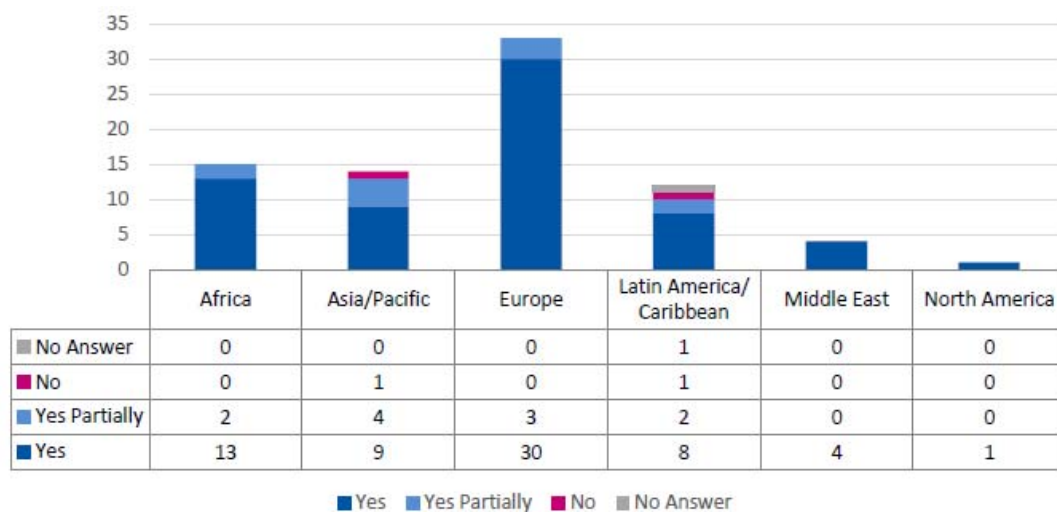


Implementation of ICAO's Policies

Enhancing the implementation of ICAO's policies on charges



States' implementation of ICAO's policies on charges for airports and air navigation services (2020)



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

Classroom/Virtual training

Joint ICAO-ACI
training on Airport
User Charges

Regional workshop/seminar

Coordination with
the ICAO SAM Office
on a regional
workshop on
*Economic Oversight
of Air Transport*



Thank You!