



**Agenda Item 1A: Follow-up on the RAAC/17**

**PRESENTATION OF THE DRAFT “SAM REGIONAL STRATEGY 2035”**

(Presented by the Secretariat)

This working paper presents the draft of the “SAM Regional Strategy 2035” for analysis and discussion. The document is the outcome of the strategic planning exercises conducted during RAAC/17.	
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<b>ICAO Strategic Objectives:</b>	All
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**1. Introduction**

1.1 The SAM 2035 Regional Strategy was developed through collaborative consultation among States, Regional and International Organizations, industry stakeholders, and partners, and aims to address emerging challenges while harnessing new opportunities for growth and sustainability.

**2. Discussion**

2.1 The 2018 Declaration to promote Connectivity through the Development and Sustainability of Air Transport in the Pan-American Region - Vision 2020-2035 aimed to enhance regional air transport by ensuring accessibility, affordability, and efficiency while integrating aviation into national development plans. It emphasized enhancing safety through systematic measures, fostering a security culture in training and operations, and strengthening civil aviation authorities to support safe and sustainable growth while reducing carbon emissions.

2.2 During the RAAC/17 in 2023, involving ICAO, States, and International Organizations, several regional challenges and aspirations were identified for the coming years in the SAM region across six key pillars:

- a) Governance
- b) Human resources
- c) Innovation
- d) Competitiveness
- e) Effectiveness of plans
- f) Environment

2.3 The graphical summary of these challenges and aspirations is presented in Appendix A.

2.4 Furthermore, the RAAC/17 meeting culminated with the “Declaration to Transform South America” (Appendix B), a key document outlining a series of directives poised to promote focus on the basilar elements that support the development of the civil aviation sector.

2.5 In 2024, ICAO presented its Strategic Plan 2026-2050, with the vision of a safe, secure and sustainable international civil aviation system that connects the world for the benefit of all nations and people. Under the new Strategic Goals of the Plan, the Organization aims to lead international civil aviation as a key driver of social and economic development while enhancing safety, security, economic development and environmental sustainability for a growing aviation system.

2.6 Based on this strategic planning process that began in 2023, the Secretariat proposes the “SAM Regional Strategy 2035” (Appendix C) for analysis, comments and approval.

2.7 In recognizing the diverse stakeholders in the aviation system—each with distinct roles, interests, and priorities—this Strategy proposes guidelines that serve as strategic pathways, not as a rigid roadmap, but as a framework to address key priorities and advance the regional commitment to a more connected South America. The programs, projects, and initiatives under the Strategy, with adequate support and commitment from stakeholders, will be monitored through appropriate indicators and targets to measure their success and ensure a results-oriented outcome.

2.8 To facilitate the identification of supporting entities and ensure commitment for effective implementation of the measures related to these programmes, projects and initiatives, more dynamic and user-friendly method and tools are under development by the ICAO SAM Regional Office and should soon be deployed. This approach balances actions that deliver short and medium-term impacts with strategies to create long-term systemic transformation.

2.9 Therefore, the meeting is invited to review and evaluate the following draft conclusion.

<b>Draft CONCLUSION</b>	
<b>RAAC18/XX</b>	<b>STRATEGIC PLANNING IN THE SAM REGION</b>
<p><b>What:</b></p> <p>That,</p> <p>a) States, International Organizations and industry in the SAM region approve the “SAM Regional Strategy 2035” (Appendix XX of this report);</p> <p>b) The Secretariat presents a mechanism for performance measurement and evaluation of programmes, projects and initiatives guided by the approved SAM Regional Strategy 2035, contingent upon the availability of supporting resources and commitment required for effective implementation. This mechanism should include objectives, targets and indicators. (extension of the conclusion RAAC17/01).</p>	<p><b>Expected impact:</b></p> <p><input checked="" type="checkbox"/> Political / Global</p> <p><input checked="" type="checkbox"/> Inter-regional</p> <p><input checked="" type="checkbox"/> Economic</p> <p><input checked="" type="checkbox"/> Environmental</p> <p><input checked="" type="checkbox"/> Operational/Technical</p>
<p><b>Why:</b></p> <p>To monitor the progress of the strategic vision, evaluate its performance and identify areas that require priority attention in the coming years, it is important to consider the region's priority strategic guidelines, which are defined in the “SAM Regional Strategy 2035”.</p>	
<p><b>When:</b> a) Immediately; b) RAAC/19</p>	<p><b>Status:</b> <input checked="" type="checkbox"/> Valid / <input type="checkbox"/> Superseded / <input type="checkbox"/> Completed</p>
<p><b>Who:</b> <input checked="" type="checkbox"/> States <input checked="" type="checkbox"/> ICAO <input checked="" type="checkbox"/> Other:</p>	<p>International Organizations and industry</p>

3. **Suggested action**

3.1 The Meeting is invited to:

- a) Take note of the information in this working paper;
- b) Analyse and comment on the draft “SAM Regional Strategy 2035”; and
- c) Analyse and approve the draft conclusion of section 2.11.

- END -

## APPENDIX A

### STRATEGIC PILLAR 1: COMPETITIVENESS

#### Regional Challenges

What are the main problem(s) our Organization, States and Industry is trying to solve?

Lack of investment in infrastructure

Few market liberalization policies were implemented.

High burden of taxes and tariffs

Low to medium air connectivity in some regions

Lack of incentives for investment

#### Aspirations

What are you trying to achieve? What does success look like for your team, project, or Organization?

Improve the regional multilateral and bilateral air services agreement to promote greater liberalization and access to the air transport market, achieving the future implementation of open skies and an integrated market.

Enhance airspace and infrastructure management to lower operational costs in the SAM region.

Enhance the competitiveness of subsidy policies and aviation fuel pricing in the SAM region compared to other regions, while promoting fleet renewal with more modern and sustainable aircraft.

Strengthen competition defense agencies and institutions by developing a regional regulatory framework that ensures fair competition among countries and airlines.

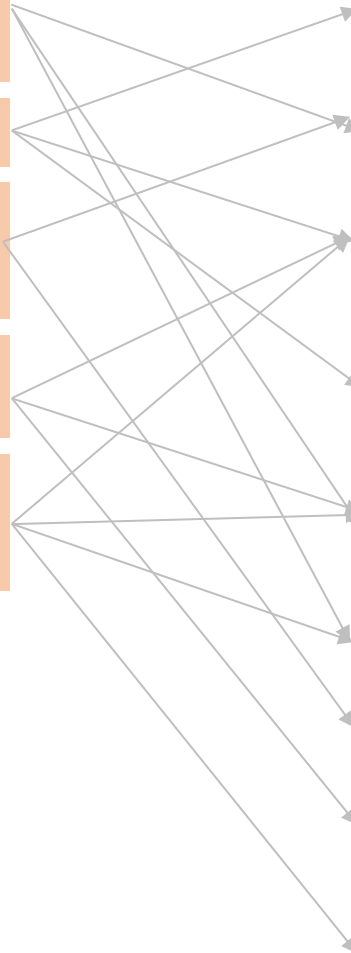
Improve the management of the implementation of the facilitation of passenger transit (One-Stop Security) among interested States, enhancing connectivity and aviation security for SAM region States and others.

Strengthen public-private partnerships to improve the development of airport infrastructure.

Promote fare and fee reduction policies to support the expansion of low-cost airline (LCC) services in the market.

Continuously improve regional regulatory harmonization of safety through SRVSOP, promoting greater connectivity.

Enhance and refine long-term projections, considering diverse realities of growth and business models, while aiming for a comprehensive diagnosis of ground and airside capacity to guide the development of a more effective investment plan for the States



## STRATEGIC PILLAR 2: ENVIRONMENT

### Regional Challenges

What are the main problem(s) our Organization, States and Industry is trying to solve?

Insufficient trained personnel to effectively manage the information generated by the framework and monitor regulatory compliance

Absence of a mechanism for trading surplus carbon credits under the CORSIA framework.

Low awareness among some high-level authorities about the benefits of joining CORSIA.

Difficulty in some cases to remain in the CORSIA program after entering the voluntary phase.

Absence of public-private forums for promoting legislation on the production and use of SAF.

Absence of regulations for SAF production.

Insufficient infrastructure for SAF distribution at aerodromes.

Lack of predictability regarding the protection of species and products that could be used for SAF production.

Difficulty in ensuring the sustainability of SAF production.

### Aspirations

What are you trying to achieve? What does success look like for your team, project, or Organization?

Promote talks and workshops on CORSIA within the Authority and among institutions involved in the State to raise awareness and understanding of the scheme.

Promote training on the scheme and the ISO standards referenced in Annex 16, Vol. IV – CORSIA, within the States, which could also be organized by the ICAO South American Regional Office.

Promote, in collaboration with Management System Certification Agencies, the inclusion of sustainable business lines in their portfolios to build capacity for certifying CO2 emissions reports.

Promote, in collaboration with air operators and aerodrome operators, the inclusion of clean energy mechanisms to support their operations, thereby reducing CO2 emissions and ensuring lower compensation requirements.

Promote the development of electronic tools to manage the emissions reports submitted by air operators.

Promote forums for the exchange of scientific and legal information on SAF production.

Promote, in collaboration with the relevant authorities, the development of regulations and legislation for SAF production that provide investors with predictability and security for their investments.

Create incentives for air operators on the use of SAF

Encourage and establish financing mechanisms for infrastructure projects dedicated to the production, distribution, and utilization of SAF.

Foster and support scientific research on SAF production.



## STRATEGIC PILLAR 3: HUMAN RESOURCES

### Regional Challenges

What are the main problem(s) our Organization, States and Industry is trying to solve?

Rigidity in hiring professionals due to public servant hiring legislation that imposes salary caps, lacks differentiation for technical positions in the aviation sector, and, in some cases, includes budget cuts.

State reduction policies do not account for the specialized nature of aviation and the challenges of replacing talent, slowing the recruitment of new professionals to replace those retiring or moving to the industry.

State policies related to the horizontal movement of professionals from one institution to another to reduce the size of the State impact Civil Aviation Authorities (CAAs) in their efforts to recruit professionals and in the learning curve of staff hired under this framework.

Departure of skilled professionals to move to the industry due to better job offers.

Lack of highly qualified and competent personnel.

Weak mechanisms for attracting talent in most States.

Limited talent succession planning for retiring personnel.

Skill development takes several years.

Lack of qualified and available personnel to start working in the sector

Removal of personnel for reasons unrelated to the technical field, such as political matters.

Weak processes for defining and controlling competencies.

### Aspirations

What are you trying to achieve? What does success look like for your team, project, or Organization?

Strengthening or establishing Human Resources or Talent Management Offices, Departments, or Directorates within Civil Aviation Authorities.

Foster opportunities to inspire children and young people to pursue aviation-related careers through initiatives such as fairs, academies, talks, and workshops.

Develop proposals for staff expansions to present to the Ministries of Finance or Economy, aiming to secure funding to enhance salaries and support workforce growth.

Strengthen planning processes to support the projection of human resource needs for Civil Aviation Authorities.

Promote recognition and incentives for aviation professionals.

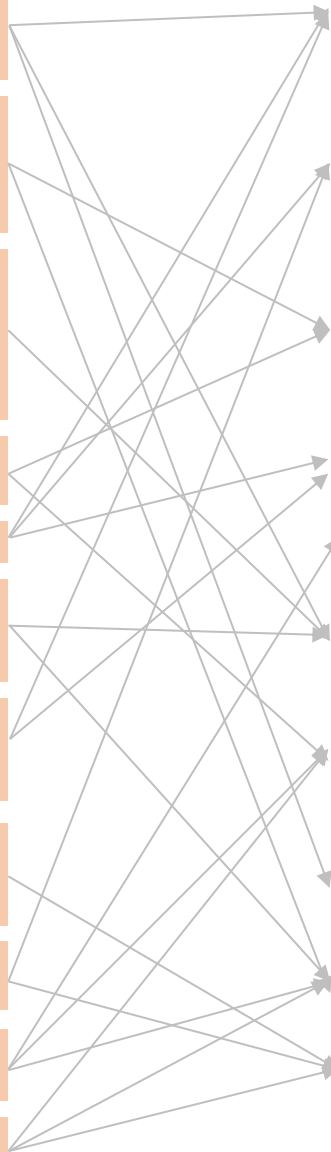
Promote the financial management independence of Civil Aviation Authorities to enable them to manage their own resources.

Leverage ICAO's Technical Cooperation mechanisms to provide transitional support for hiring human resources while the State enhances its professional recruitment processes.

Establish a legislative framework that enables differentiated hiring mechanisms for technical personnel, ensuring tailored pay scales and specialized recruitment processes.

Implement career development plans to improve job safety and stability for professionals.

Promote collaborative frameworks among States, creating pools of professionals who could support one or more States.



## STRATEGIC PILLAR 4: EFFECTIVE PLANS

### Regional Challenges

What are the main problem(s) our Organization, States and Industry is trying to solve?

Challenges in integrating specific civil aviation plans into the various development plans within a State, such as tourism development plans, market growth strategies, and environmental protection initiatives.

Lack of support from public policies that frame civil aviation as a fundamental instrument for the social and economic development of the State.

The lack of impact of existing plans on decision-making and the integration of efforts within States.

The overwhelming demands of daily tasks limit the time available for strategic actions.

Lack of information to prepare work plans for the different areas.

Difficulty in coordinating with the various institutions involved in passenger management at airports.

Difficulty in establishing accurate indicators (KPIs) for plans.

Difficulty in monitoring progress toward the proposed goals.

Difficulty in implementing and achieving the proposed goals in the plans.

Lack of clear ideas for controlling implementation and its updates.

### Aspirations

What are you trying to achieve? What does success look like for your team, project, or Organization?

Ensure high-level involvement in the development and implementation of National Air Transport Development Plans.

Leverage foreign assistance (TCB) to support the development of a comprehensive strategic plan.

Work towards aligning National Development Plans with the Aviation Strategic Plan.

Develop regional indicators to be included in the plans.

Implement and identify tools and/or procedures to monitor indicators and the degree of implementation of plans.

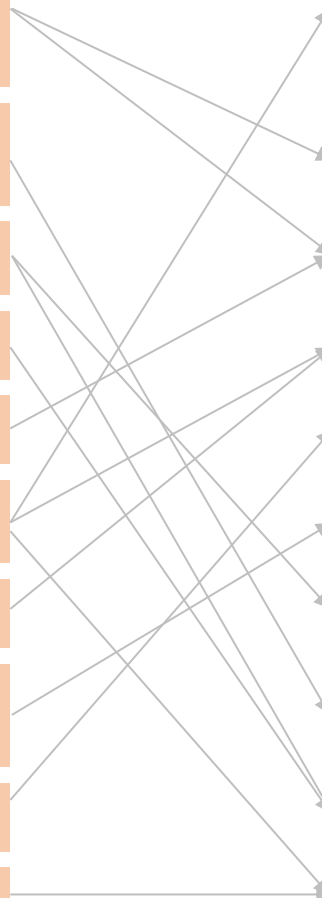
Foster collaboration within the State and at the regional level to identify triggers for reviewing and updating the plans.

Work towards standardizing the format of National Plans at the regional level.

Promote awareness among governments about the importance of designing a Civil Aviation and Air Transport Master Plan for the States.

Strengthening planning processes to support the projection of Civil Aviation Authorities within previously established timeframes.

Work towards establishing or connecting with the State's Planning Unit to ensure coordinated and effective planning efforts.



## STRATEGIC PILLAR 5: GOOD GOVERNANCE & TRANSPARENCY

### Regional Challenges

What are the main problem(s) our Organization, States and Industry is trying to solve?

High turnover of authorities.

Gaps in human resource planning.

Continuous changes in the middle management.

The impact of state reduction policies on CAAs' ability to renew and maintain technical staff.

Difficulty adapting to new technologies and the profiles required for effective management.

Legal or institutional difficulties in establishing modern regulations that encourage compliance with standards beyond merely creating a punitive framework.

Frequent changes to internal structures.

Lack of awareness about the impact of talent loss on operational safety.

### Aspirations

What are you trying to achieve? What does success look like for your team, project, or Organization?

Develop a decision-making process grounded in evidence and supported by technical and operational expertise, while striving for consensus whenever possible.

Promote an independent budget source linked to performance (e.g., passenger fees).

Promote the dissemination of findings on the governance of CAAs in the SAM Region, leveraging OECD and UNDP materials and adopting independent governance models.

Ensure that administrative and operational staff fully understand and embrace the commitment to governance.

Promote transparency through the implementation of regulatory impact studies and public consultation processes.

Strengthen meritocracy and career development for senior positions with clearly defined career plans, job descriptions, and functions.

Seek to establish legally guaranteed institutional autonomy, ensuring the independence and integrity of senior positions.

Strengthen the continuity of state policies through established governmental plans.

Ensure that government personnel are aligned with strategic direction and management priorities, rather than being focused on operational matters.

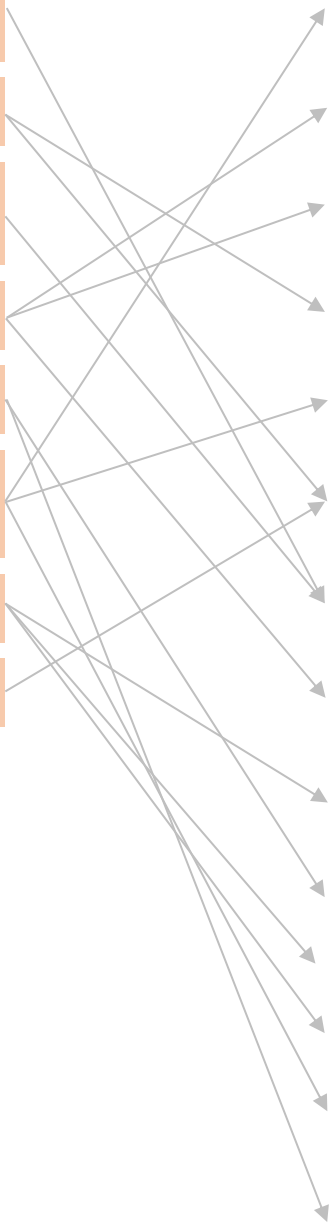
Leverage artificial intelligence to transform and enhance governance processes for greater efficiency and effectiveness.

Advance the institutional maturity level of our authorities.

Ensure that governance structures and their responsibilities are clearly defined and effectively communicated.

Establish governance frameworks where the scope of influence and control is clearly defined through policy or legislation.

Explore the establishment of an agency similar to SRVSOP for AVSEC (SRVSEC) to enhance regional collaboration and standardization.



## STRATEGIC PILLAR 6: INNOVATION

### Regional Challenges

What are the main problem(s) our Organization, States and Industry is trying to solve?

Resistance to change.

The misconception that innovation is only related to technology.

Overreliance on prescriptive regulatory solutions.

The one-way hierarchical relationship between the regulator and the regulated

### Aspirations

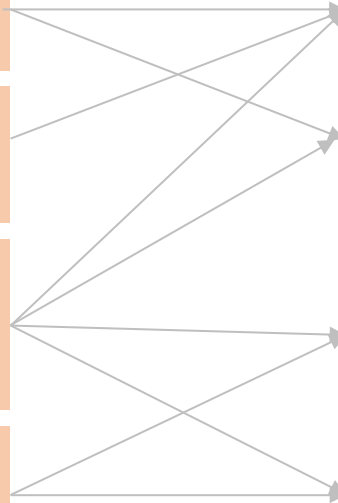
What are you trying to achieve? What does success look like for your team, project, or Organization?

Develop comprehensive planning for human and financial resources, emphasizing staff qualification and training, to empower States to effectively manage internal and external innovation.

Implement collaborative processes between the State, industry, and service providers to explore and agree on regulatory alternatives that enable the rapid adoption of innovative solutions while ensuring an adequate level of user protection.

Establish a regional forum on innovation to facilitate the dissemination, exchange, and access to updated information on innovation, including regulatory developments, new technologies, best practices, and other information that supports the advancement of States and key stakeholders.

Foster cooperative environments between the State and the academic sector to integrate research and development as a fundamental component of regulation, facilitation, and oversight of innovation.



## APPENDIX B



### **DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION**

**Santiago, Chile - 14 April 2023**

We, the Civil Aviation Authorities (CAAs) of the South American Region, FAA, EASA, Industry Associations, and partners aircraft manufacturers, gathered here in the city of Santiago, Chile, to carry out a strategic exercise that provided transformational directives to ensure the sustainable growth and development of the aviation industry as an effective instrument for the promotion of the social and economic development of our Region. To achieve this, we focused our discussions on the following six pillars: competitiveness, environmental sustainability, human resources, effectiveness of aviation plans, governance of CAAs and innovation.

After this exercise and discussions around these six pillars, and within the framework of the Declaration to promote connectivity through the Development and Sustainability of Air Transport in the Pan-American Region (Fortaleza, Brazil 2018), the Seventeenth Meeting of Directors of Civil Aviation of the South American Region (RAAC/17):

**DECLARES** the following commitments:

1. We will work to foster a competitive environment that encourages new players and promotes investments, innovation, affordability, and better services for our aviation sector, enhancing its efficiency, safety, and security.
2. We will be the champions in our governments and organizations in promoting the integration of efforts between States, Industry and Academia to develop vanguard policies and initiatives to promote the Long-Term Aspirational Goal (LTAG) and the development, production and use of sustainable fuels and technologies.
3. We value our people as a key element for the continuous development of the aviation industry and we will invest in their development to enhance their skills and expertise, and at the same time open the doors for the next generation of women and men aviation professionals.
4. We will strive to develop and implement effective plans and policies that promote the growth and development of the aviation industry while ensuring integration with the other economic sectors that have aviation as a part of their value chain.
5. We will promote good governance practices to strengthen our CAAs and ensure a transparent, participative, and accountable aviation regulatory environment in the States of our Region.

6. We will encourage and support innovation in the aviation industry by promoting the research and development, the use of modern technologies and collaboration with stakeholders from the industry and academia.

We are committed to these pillars and will collaborate with all stakeholders to achieve our shared goals of a safe, secure, efficient, sustainable, and thriving aviation industry in South America.

The Civil Aviation Authorities Directors and industry partners highlighted the following:

**Argentina – Lic. Paola Tamburelli, National Administrator, ANAC**

*“We had the opportunity to meet in this inspiring National Museum of Aeronautics and Space, to ratify our regional commitment and to discuss fraternally about the present and future of civil aviation.*

*We assume the challenge of taking the necessary actions to ensure a safe, competitive, and sustainable aviation that is a true engine for the transformation of South America.*

*We have the experience, the commitment, and the human resources to leave our mark on global aviation”.*

**Bolivia – Eng. José Iván García Terceros, Executive Director, DGCA**

*“Airlift squadrons profess, “Being Together is a Beginning, Staying Together is an Achievement, and Working Together is Success in Our Purposes”.*

*Working as a Region is a challenge for the global decarbonization of the aviation industry. We have the potential in the Region to make it sustainable with our capability to produce Sustainable Aviation Fuels (SAF) fuels.*

*The search for Leadership in the SAM Region is a process of continuous improvement in which we must all be actors”.*

**Brazil – Mr. Tiago Sousa Pereira, Director-President, ANAC**

*“The development of aviation in South America requires strong and independent governance from the regulatory authorities, which allows them to plan and execute consistent, effective, and sustainable actions in the long term. Therefore, it is concluded that it is necessary for the Region to advance in the level of institutional maturity of the authorities that guarantees stability, autonomy, and accountability”.*

**Brazil – Ten. Brig. do Ar Alcides Teixeira Barbacovi, Director General, DECEA and President, CERNAI**

*“On behalf of DECEA, Department of Airspace Control of the Brazilian Air Force, by participating in the 17th RAAC, I thank you for the opportunity provided by ICAO Lima to exchange knowledge, experiences and discuss good management and strategic planning practices with the authorities of civil aviation. This Meeting will certainly contribute to the civil aviation sector, further preparing our staff, improving connectivity, and promoting innovation. From it, we will be able to adopt concrete actions for the operation of aircraft in a more sustainable way.*

*At the end, we will be regionally strengthened and focused on the search for an increasingly complete aeronautical service. We congratulate you on the initiative in preparing a regional strategic plan, in view of the challenges ahead”.*

**Chile - General Aviation Raúl Jorquera Conrads, Director General, DGAC**

*“The message or motto for this Meeting is to let us transform South America and I want us to stay with that spirit.*

*Let us transform South America is the message that ICAO wants to promote in this South American Meeting for the development of civil aviation. Let us transform South America, is to work as a team to see what the current situation of our respective countries is and what are the regional priorities, such as the*

*ratification of international aviation law treaties and above all, initiatives for the development and sustainability of air transport in the Region”.*

**Chile – Mr. Martín Mackenna Rueda, Secretary General, Civil Aviation Board**

*"First of all, I want to thank the ICAO SAM Regional Office and the DGAC of Chile for their impeccable organization of RAAC/17, as well as highlighting the contribution of the authorities and organizations that participated in this activity, where, among other aspects of the agenda, I would like to highlight the LTAG/SAF Seminar and the innovative strategic planning exercise that took place in the framework of this Meeting.*

*I invite all of us who participate in RAAC/17 to continue tackling together the main challenges of the aeronautical sector in our Region. One of these is the de-carbonization of air transport, to which we are all committed through the LTAG that we agreed on at the 41st ICAO Assembly. Each State must contribute to this goal of net zero emissions by 2050 and collaborative work between us is essential to achieve it.*

*On the other hand, we must make progress in being more competitive to become an increasingly accessible mode of transport and to fully recover from the COVID-19 pandemic, for which, it is essential to reach agreements between the authorities that allow efficiency and dynamism to the sector. All the above, without leaving aside the most important asset of aviation, which is safety”.*

**Guyana - Lt. Col. Egbert Field, Director General, Guyana Civil Aviation Authority**

*“The future is here, and we cannot afford to wait. The old approach of doing business will not propel us into this new era of innovation, environmental and human resource issues, etc. This is, therefore, a unique opportunity to formulate an approach which will bring renewed energy and ideas to meet the challenges which will arise from this rapidly expanding sector.*

*The new format of this RAAC/17 Meeting, in my opinion, therefore, sets the correct platform for this transformation of the aviation industry in South America. By amalgamating the ideas, suggestions, and experiences of the people in various sectors of the industry, we can transform South America - a change is going to come!”.*

**Panama - Mr. Carlos Von Seidlitz, Director, Air Transport, CAA**

*“The RAAC/17 experience has been highly enriching. The participation of the actors in the energy sector has been very interesting and has allowed us to make visible the industry's investment in the region, and in sister countries where alternative, fewer polluting fuels are produced. These efforts bring us closer to the regional path towards the 2050 goals on emissions. Panama appreciates the effort of the Regional Office to organize such a dynamic and interesting Meeting, which will be key to the transformation of SAM Region”.*

**Paraguay – Mr. Felix Kanasawa, President DINAC**

*“On behalf of the Paraguayan State, I would like to thank the hospitality and cordiality of the General Directorate of Civil Aeronautics of Chile for welcoming us and for carrying out this Meeting of Civil Aviation Authorities of the SAM Region.*

*Also, highlight the support of the ICAO SAM Regional Office in such an outstanding event where authorities from different States and industry representatives focus on facing the present in order to build a sustainable future of aviation contributing to the development of SAF as well as the challenges arising from technological innovation and update aeronautical regulations in order to guarantee the efficiency, effectiveness and safety of operations.*

*Also note that, with the commitment, collaboration and support of all sectors, we will be able to TRANSFORM SOUTH AMERICA”.*

**Venezuela - M/G Juan Manuel Teixeira Díaz, President, INAC**

*“Today's world faces us with great challenges that call us to join efforts to achieve a more just society and a more efficient, sustainable, safe and competitive air transport, therefore, hand in hand with ICAO SAM, let us build air bridges to unite our people, let us promote mechanisms to achieve union in diversity, cooperation and South American integration; only together we will achieve the South American transformation.*

*We would like to take this opportunity to thank the SAM Regional Office, its technical team and members of the DGAC for their hospitality, effort and high professional level in carrying out this activity”.*

**ACI LAC – Mr. Francisco Medela Alonso, Industry Affairs Director**

*“We appreciate the invitation of the ICAO SAM regional office to participate in the annual Meeting of Directors of Civil Aviation of the Region.*

*We positively highlight the strategic planning exercise that encourages participation and exchange of experiences between the different states. We appreciate the efforts to increase the productivity of these sessions”.*

**CANSO – Sr. Javier Vanegas – Director, Latin America and Caribbean Affairs**

*“The RAAC/17 was conducted in a very dynamic and efficient manner, involving the civil aviation directors, making merit to its motto "Transforming South America". The format for defining the future of aviation in the South American Region was an initiative that I am sure will continue and be set as the basis for future meetings.”*

**EASA – Mr. Alfonso Arroyo Fernández, Representative for Latin America and Caribbean  
Ms. Eleonora Italia, International Cooperation Officer**

*“Our first experience at RAAC17 was extremely positive as we witnessed a very professional collaboration and open dialogue among States and organizations of the Region. We agree with the importance of the six strategic exercises which conclusion showed a highly harmonized approach. EASA, as a RSOO, shares the importance recognized to the regional approach and is continuously available to strengthen the partnership and to share practices with ICAO SAM Office, the SRVSOP, LACAC and their Member States”.*

**FAA – Mr. Nicholas Reyes, Western Hemisphere Regional Director**

*“I wish to congratulate you on a highly productive, dynamic, and visionary Meeting. I hope this is the beginning of a movement to evolve the protocol of ICAO SAM meetings, and that it expands to the NACC region, and other regions. The format used is initiative-taking and creative. He kept the participants involved in all the planned activities. I look forward to seeing the results of the work done during the week”.*

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# SAM Regional Strategy 2035

TRANSFORMING THE CIVIL AVIATION OF SOUTH AMERICA

ICAO SAM REGIONAL OFFICE



| ICAO LIMA

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# FOREWORD FROM THE ICAO SOUTH AMERICAN REGIONAL OFFICE

*In an ever-evolving global landscape*, the civil aviation sector stands as a vital pillar of economic growth, connectivity, and progress for nations across the Region. In 2023, during the Civil Aviation Authorities Meeting/17 (RAAC/17), the Civil Aviation Authorities (CAAs) of the South American Region (SAM) and from other Regions, Industry representatives and Associations, Regional Organizations and partners, gathered in the city of Santiago, Chile, to carry out a strategic exercise that provided transformational directives to ensure the sustainable growth and development of the aviation industry as an effective instrument for enhanced connectivity and the promotion of the social and economic development of our Region.

In 2024, the ICAO Council approved the “Strategic Plan 2026-2050” which reflects the ICAO’s long-term aspiration to achieve bold Strategic Goals for the strong growth of international aviation, underpinned by flawless delivery of safety and security, and enhanced by new initiatives including fostering investment for aviation infrastructure especially where significant gaps exist, including innovative new services that streamline the passenger’s facilitation and experience amid rising demand. It also delivers on the Long Term Global Aspirational Goal of net-zero carbon emissions for international aviation by 2050.

To address global and regional civil aviation challenges, the Entities that convened in 2023 have prioritized six Strategic Pillars: **competitiveness, environmental sustainability, human resources, effectiveness of aviation plans, governance of CAAs and innovation.**

This SAM 2035 Regional Strategy outlines Strategic Guidelines based on these six Strategic Pillars. The Strategic Guidelines are high-level directives that provide focus and direction towards a structured approach and contribute to the achievement of the new ICAO Strategic Goals:



**EVERY FLIGHT IS SAFE AND SECURE**



**AVIATION IS ENVIRONMENTALLY SUSTAINABLE**



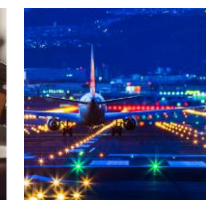
**AVIATION DELIVERS SEAMLESS, ACCESSIBLE, AND RELIABLE MOBILITY FOR ALL**



**NO COUNTRY LEFT BEHIND**



**THE INTERNATIONAL CIVIL AVIATION CONVENTION AND OTHER TREATIES, LAWS AND REGULATIONS ADDRESS ALL CHALLENGES**



**THE ECONOMIC DEVELOPMENT OF AIR TRANSPORT ASSURES THE DELIVERY OF ECONOMIC PROSPERITY AND SOCIETAL WELL-BEING FOR ALL**

# INTRODUCTION

***“The future is here, and we cannot afford to wait. The old approach of doing business will not propel us into this new era of innovation, environmental and human resource issues. This is, therefore, a unique opportunity to formulate an approach which will bring renewed energy and ideas to meet the challenges which will arise from this rapidly expanding sector.*”**

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

The SAM 2035 Regional Strategy is a transformative initiative designed to achieve the aspirations of civil aviation in South America. Developed through collaborative consultation among States, Regional and International Organizations, industry stakeholders, and partners, this strategy aims to address emerging challenges while harnessing new opportunities for growth and sustainability.

The aviation industry is undergoing profound transformations, with increasing demands for competitiveness, environmental sustainability, human resource development, effective planning, strong governance, and continuous innovation. These six strategic pillars form the foundation of the SAM Regional Strategy 2035, aligning with ICAO’s Strategic Plan 2026-2050 to ensure a cohesive and forward-looking approach.

As air traffic in the Region continues to grow, States face new challenges in ensuring operational efficiency, enhancing safety and security, and integrating innovative technologies. At the same time, sustainability has become a central priority, requiring coordinated efforts to reduce emissions, promote sustainable aviation fuels (SAF), and support ICAO’s Long-Term Aspirational Goals (LTAG). Strengthening human talent is also critical, as the industry must attract, develop, and retain highly skilled professionals to meet future demands.

Strategic and integrated planning ensures the effective allocation of resources, infrastructure development, and technological adaptation. By aligning national, regional and global strategies, South American States can strengthen regulatory frameworks, improve governance, and create an aviation sector that drives social well-being, economic growth and regional integration. Innovation remains a key driver of progress, with a focus on adopting emerging technologies, streamlining regulatory processes, and enhancing collaboration between academia and industry.

The SAM Regional Strategy 2035 serves as an overarching outline for action, guiding States, industry, and aviation stakeholders toward a sustainable and resilient future. Through strategic alignment, collaboration, and proactive policy development, this strategy aims that South America’s aviation sector remains competitive, adaptable, and fully prepared for the opportunities and challenges ahead.

**STRATEGIC PILLAR 1: COMPETITIVENESS**



**STRATEGIC PILLAR 2: ENVIRONMENT**



**STRATEGIC PILLAR 3: HUMAN RESOURCES**



**STRATEGIC PILLAR 4: EFFECTIVE PLANS**




**STRATEGIC PILLAR 5: GOOD GOVERNANCE**



**STRATEGIC PILLAR 6: INNOVATION**





# STRATEGIC PILLAR 1: COMPETITIVENESS

***“We will work to foster a competitive environment that encourages new players and promotes investments, innovation, affordability, and better services for our aviation sector, enhancing its efficiency, safety, and security.”***

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

The **Competitiveness Pillar** focuses on enhancing the aviation sector’s ability to drive economic growth, social well-being, improve connectivity, and foster regional integration in South America (SAM) and abroad. Recognizing the vital role of air transport as a driver of social and economic development, this pillar aims to address the barriers that limit the competitiveness of civil aviation in the region. At the same time, through collaborative efforts, this pillar seeks to create a more attractive business environment, modernize infrastructure, and implement policies that promote sustainable growth and operational efficiency.

## Regional Challenges and Aspirations

Several critical **challenges** affecting the competitiveness of the SAM region were identified. These include limited market liberalization, high taxes and tariffs, insufficient investment in airport and air navigation infrastructure, and low connectivity in certain areas. Additionally, the absence of incentives for investment and the lack of a long-term strategic approach further hinders the region’s ability to compete globally.

In response to these **challenges**, the **aspirations** for the SAM region emerged, identifying opportunities to enhance competitiveness. Key **aspirations** include modernizing infrastructure, improving airspace management, promoting public-private partnerships, harmonizing regulatory frameworks, and implementing market liberalization policies. A central focus is on fostering sustainable and environmentally friendly growth while addressing regional disparities in connectivity and economic opportunities.

## Strategic Guidelines

Over the next decade, the SAM region will adopt the following **strategic guidelines** to address these **regional challenges** and achieve its **aspirations**. Guided by this approach, the SAM region will focus on:

### **STRATEGIC GUIDELINE 1.1: Balance operational capacity with demand and improve sector efficiency.**

By enhancing capacity, the region can better accommodate growing passenger and cargo demand, which is essential for stimulating regional economies and improving global competitiveness. Efficiency improvements, such as streamlined air traffic management, modernized infrastructure investments, and optimized landside processes, help reduce delays, lower costs and emissions, and enhance passenger experience. In a region where connectivity is often limited by geographic and infrastructural challenges, balancing capacity with current and future demand, and increasing efficiency also bridge gaps between remote and urban areas. This guideline supports equitable access to air transport services, fosters regional integration, and creates opportunities for new routes and markets.

### **STRATEGIC GUIDELINE 1.2: Advance liberalization, reduce economic barriers and leverage from regional integration.**

By reducing regulatory barriers and fostering open skies agreements, countries can enhance market access, encourage competition, and lower operational costs. This guideline can enable airlines to expand routes, offer more affordable fares, and improve connectivity across the region, benefiting passengers and businesses alike. Leveraging from overarching agreements that strengthen cooperation among member States, promote collaborative regional mechanisms ensuring aligned policies and infrastructure development. It also supports economic growth by boosting trade, tourism, and job creation. Ultimately, this guideline aims to position the region as a unified and competitive market in global aviation.

### **STRATEGIC GUIDELINE 1.3: Enhance synergy between civil aviation and related industries.**

Collaboration with tourism, logistics, trade and technology partners, as well as improved synergy with the corresponding authorities, such as those responsible for border control, can further enhance connectivity, streamline operations, and promote innovation. This guideline strives facilitation, make more efficient use of resources, reduce operational costs, and boost economic growth. By aligning efforts, objectives, plans and policies, such partnerships can reduce administrative and bureaucratic costs, improve passenger experience, facilitate trade, support tourism, businesses and cultural exchange across South America.



# STRATEGIC PILLAR 2: ENVIRONMENTAL SUSTAINABILITY

***“We will be the champions in our governments and organizations in promoting the integration of efforts between States, Industry and Academia to develop vanguard policies and initiatives to promote the Long-Term Aspirational Goal (LTAG) and the development, production and use of sustainable fuels and technologies.”***

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

With aviation being both an enabler of economic growth and a contributor to environmental challenges, the **Environmental Sustainability Pillar** focuses on aligning the sector with global sustainability goals, in particular the Long-Term Aspirational Goal on CO<sub>2</sub> Emissions (LTAG), which will leverage from the development and use of Sustainable and Low Carbon Aviation Fuels (SAF and LCAF), the implementation of Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA), and from operational and technological advancements.

## Regional Challenges and Aspirations

Several critical **challenges** affecting the Environmental Sustainability of the SAM region were identified. Key **challenges** include limited participation in CORSIA, driven by governmental policies, lack of technical knowledge, and concerns over potential costs. Additionally, South America faces obstacles in becoming a global leader in SAF production, due to several factors, such as insufficient policies and legislation, infrastructure gaps, and reduced public-private partnerships.

Despite these barriers, the SAM region holds immense potential to lead in sustainable initiatives in aviation. Regional **aspirations** include increasing State participation and compensation programmes in CORSIA, developing robust regulations for SAF production, fostering collaboration among stakeholders, and building the necessary infrastructure to support sustainable growth. These aspirations reflect a shared commitment to integrating sustainability into every aspect of the aviation ecosystem, ensuring long-term environmental, social and economic benefits.

## Strategic Guidelines

Over the next decade, the SAM region will adopt the following **strategic guidelines** to address these **regional challenges** and achieve its **aspirations**. Guided by this approach, the SAM region will focus on:

### **STRATEGIC GUIDELINE 2.1: Systematically advocate for the opportunities in the Region enabled by the LTAG.**

Providing information and raising awareness to State authorities and the private sector about the opportunities for developing sustainable projects in support of the LTAG can drive effective measures to promote policies, encourage research, deploy investments and stimulate the use of renewable energy, LCAF, SAF, and other sustainable solutions. It also should highlight the economic potential of sustainability, including education, job creation, technological innovation, and enhanced regional competitiveness.

### **STRATEGIC GUIDELINE 2.2: Establish strategic collaboration mechanisms to engage stakeholders in advancing on the LTAG.**

By bringing together Regional and National levels, State entities, industry, academic institutions, and other stakeholders from the aviation, energy, environment, agriculture and other related sectors, this guideline aims that resources, expertise, and efforts are aligned to address regional and national priorities on sustainability. Strengthening partnerships through structured mechanisms, such as State-Industry roundtables, regional groups and alike can enhance significantly the Region's ability to implement innovative solutions, with lower costs, in the timely deployment of studies, policies, regulations, projects and investments.

### **STRATEGIC GUIDELINE 2.3: Incentivize and support the deployment of sustainable initiatives and projects in aviation.**

The advancement of sustainable aviation in the South American region greatly depends on the development of policies and regulations that incentivize production and adoption of sustainable fuels, operational improvements, green technologies, along with compensation initiatives aligned with CORSIA. Furthermore, the Region should also leverage from funding mechanisms that bridge the gap between sustainable projects in aviation and financial institutions.



## STRATEGIC PILLAR 3: HUMAN RESOURCES

***“We value our people as a key element for the continuous development of the aviation industry and we will invest in their development to enhance their skills and expertise, and at the same time open the doors for the next generation of women and men aviation professionals.”***

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

A skilled and motivated workforce is critical to ensuring compliance, and the effective management of aviation systems. The [Human Resources Pillar](#) focuses on addressing the challenges of workforce planning, recruitment, development, and retention, as well as fostering a professional culture that promotes innovation and continuous improvement in the sector.

### Regional Challenges and Aspirations

Several critical [challenges](#) affecting the human resources of the SAM region were identified. These include rigid hiring processes constrained by public service legislation, salary caps, and limited flexibility in technical pay scales across various aviation roles. Additionally, State policies aimed at reducing the size of the public sector overlook the specialized nature of aviation, creating barriers to attract and retain qualified personnel. Workforce shortages are further exacerbated by high turnover rates, the migration of skilled professionals to the private sector, and the absence of structured career paths.

The [aspirations](#) for the SAM region were shaped through these discussions, aiming to address these challenges by strengthening workforce planning, creating structured career development opportunities, and promoting collaborative strategies between States. They also focus on fostering interest in aviation careers among younger generations and ensuring financial independence for CAAs to manage resources effectively.

### Strategic Guidelines

Over the next decade, the SAM region will adopt the following [strategic guidelines](#) to address these [regional challenges](#) and achieve its [aspirations](#). Guided by this approach, the SAM region will focus on:

### **STRATEGIC GUIDELINE 3.1: Attract and develop human talent and skilled personnel for the aviation sector.**

With the increasing demand for aviation services and the pressing need for innovation and sustainability, the sector requires a continuous inflow of qualified professionals to address operational, technical, and regulatory challenges. By fostering a welcoming environment where women and men can equally identify opportunities for their development in the sector and engaging individuals that may not initially consider aviation as a path towards a professional fulfilment, this guideline aims to promote aviation as an attractive sector, where talent can flourish, and skilled professionals can grow and contribute to its development.

### **STRATEGIC GUIDELINE 3.2: Adopt best practices on human talent management within CAAs.**

Effective human talent and competency management ensure that CAAs have skilled and motivated personnel to fulfill their regulatory responsibilities and continue to promote development and innovation in the sector. This guideline aims to promote the identification of talent needs in terms of expertise and workforce demand, development of standardized training, clear career paths, and continuous professional growth. It also addresses talent gaps and high turnover, fostering a culture of continuous learning and competency development.

# STRATEGIC PILLAR 4: EFFECTIVE PLANNING

***“We will strive to develop and implement effective plans and policies that promote the growth and development of the aviation industry while ensuring integration with the other economic sectors that have aviation as a part of their value chain.”***

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

Recognizing the critical role of comprehensive and coordinated planning, the **Effective Planning Pillar** emphasizes the need for well-structured, actionable, and measurable national and regional plans that align with global aviation strategies. Effective planning not only supports the efficient allocation of resources but also ensures that the aviation sector can adapt and support other economic sectors to emerging challenges and seize opportunities for growth and innovation.

## Regional Challenges and Aspirations

Several critical **challenges** affecting the effectiveness of planning processes in the SAM region were identified. These include a lack of sufficient information to prepare comprehensive plans, difficulties in coordinating across institutions, challenges in establishing and monitoring key performance indicators (KPIs), and limited clarity on how to control implementation and ensure updates. These issues hinder the ability of States to create and execute plans that effectively address the evolving needs of the aviation sector.

To address these **challenges**, the **aspirations** for the SAM region focus on aligning national plans with regional and global strategies, strengthening institutional coordination, and enhancing the tools and methodologies used for planning and monitoring. A driving purpose is to create a unified framework that empowers States to develop, implement, and update effective civil aviation plans, ensuring they remain relevant and impactful.

## Strategic Guidelines

Over the next decade, the SAM region will adopt the following **strategic guidelines** to address these **regional challenges** and achieve its **aspirations**. Guided by this approach, the SAM region will focus on:

#### **STRATEGIC GUIDELINE 4.1: Strengthen cross-sector benefits from aviation to the socioeconomic development of the Region.**

A strong aviation sector drives economic prosperity and social well-being by boosting trade, tourism, attracting investments, creating jobs, and stimulating other economic sectors. It is essential to consolidate the understanding of aviation-related plans as dynamic processes that not only advance the sector itself but also contribute to broader national and regional development strategies. This guideline aims to strengthen the cross-sector benefits of aviation by encouraging stakeholders to develop, promote, and utilize information that clearly demonstrates the sector's role within the value chains of other industries. Additionally, it emphasizes the importance of active participation in the formulation of policies and plans across different sectors, which will reinforce aviation's contributions, foster stronger intersectoral collaboration, and maximize its economic impact.

#### **STRATEGIC GUIDELINE 4.2: Promote the modernization and integration of regional and national plans.**

As the aviation sector evolves, new technologies, shifting market dynamics, and rising expectations for environmental sustainability add to the existing demands of safety, security, capacity, and efficiency. Fragmented plans that focus solely on specific areas often limit the benefits of a comprehensive approach, reducing decision-makers' ability to fully grasp priorities and the impacts of their decisions—or lack thereof—on the actual implementation of these plans. While it is essential to keep national and regional plans aligned with the latest global provisions, it is also key to ensure that they reflect the most recent local developments. This guideline intends to promote continuous assessment and feedback to the planning processes and support their implementation, considering aviation's broader economic impacts and benefits, with long-term contributions that align with policy goals and meet evolving market expectations.



## STRATEGIC PILLAR 5: GOOD GOVERNANCE

***“We will promote good governance practices to strengthen our CAAs and ensure a transparent, participative, and accountable aviation regulatory environment in the States of our Region.”***

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

To strengthen the [Governance pillar](#), the adoption and implementation of international best practices in public management can drive to significant improvements in the regulatory and State functions. This involves ensuring decision-making and governance structures that uphold the independence of regulators in their decision-making, preventing undue influence to preserve institutional trust, and enhancing accountability and transparency.

### Regional Challenges and Aspirations

Among the governance [challenges](#) faced by some CAAs in the SAM region include unplanned turnover among authorities and changes in middle management can hinder the continuity of policies and processes, while ongoing adjustments to internal structures require continuous efforts to maintain efficiency. Additionally, gaps in human resource planning disrupt the consolidation of specialized technical teams, and transition to new technologies, coupled with the need to incorporate professional profiles aligned with current management demands, posing opportunities for improvement. Furthermore, updating regulatory frameworks to effectively and sustainably promote compliance—beyond strictly punitive approach— remain a key priority. Likewise, a modernized legal framework is needed to clearly define responsibilities and operational scope of the Civil Aviation Authority and other related authorities (such as the Accident Investigation Authority), ensuring alignment with broader State strategies. Finally, improving the management of administrative and operational processes will enable more efficient and effective standardization, certification, and oversight, thereby strengthening system performance and long-term sustainability.

In face of these [challenges](#), the SAM region has outlined [aspirations](#) to build governance frameworks that promote institutional autonomy guaranteed by law, ensuring leadership continuity beyond political cycles, fostering transparency through public consultations and regulatory impact studies, and adopting advanced tools like artificial intelligence to enhance governance processes. These aspirations aim to create a governance framework that supports long-term policy implementation and strengthens the aviation sector’s ability to adapt to evolving global demands.

## Strategic Guidelines

Over the next decade, the SAM region will adopt the following **strategic guidelines** to address these **regional challenges** and achieve its **aspirations**. Guided by this approach, the SAM region will focus on:

### **STRATEGIC GUIDELINE 5.1: Modernize the Legal and Regulatory Framework for Civil Aviation.**

This guideline aims at establishment of updated legal frameworks that strengthen institutionally the Civil Aviation Authorities and promote robust governance structures. Laws supporting the mandate cycle of senior officials, clearly outlining the responsibilities and delegation of authorities, and reinforcing the continuity of State policies are essential. Leveraging from the harmonization of the regional mechanisms and implementing best practices in the normative, certification and oversight processes will support a streamlined approach on the core regulatory State responsibilities and enhance compliance to international provisions. Likewise, ensuring adequate procedural frameworks will contribute to the continuous improvement and transparency of accident investigations.

### **STRATEGIC GUIDELINE 5.2: Implement Best Governance Practices in the CAAs.**

To fulfill their regulatory functions, Civil Aviation Authorities should have a clear mandate and role within the State, be protected from undue influence, maintain technical independence in decision-making, ensure accountability and transparency, engage effectively with aviation stakeholders, secure adequate funding, and continuously assess their performance over time. This guideline aims to promote best practices and support their implementation.

### **STRATEGIC GUIDELINE 5.3: Enhance management and oversight in safety and security.**

Robust and systemic oversight frameworks ensure compliance with international standards, minimize risks, and foster proactive safety and security cultures. Strengthening governance, risk management, and regulatory mechanisms enhance operational resilience, and allow the sector to be able to continuously improve its performance levels, as aviation continues to grow. By improving management and coordination in safety and security between authorities, industry, and other stakeholders, the Region can address emerging threats, reduce vulnerabilities, and align with ICAO's global safety and security objectives. Moreover, this guideline aims at clear policies and coordination mechanisms to ensure comprehensive assistance for aircraft accident victims and their families and stakeholder engagement in crisis management.



# STRATEGIC PILLAR 6: INNOVATION

***“We will encourage and support innovation in the aviation industry by promoting the research and development, the use of modern technologies and collaboration with stakeholders from the industry and academia.”***

DECLARATION FOR THE TRANSFORMATION OF THE CIVIL AVIATION OF THE SOUTH AMERICAN REGION. Santiago, Chile - 14 April 2023

The **Innovation Pillar** represents a transformative opportunity for the South American (SAM) region to position itself as a global leader in aviation innovation. By fostering an environment that supports the rapid adoption of cutting-edge processes and technologies, the SAM region can enhance efficiency, sustainability, and competitiveness. This pillar emphasizes not only technological advancements but also process innovation and collaborative mechanisms to drive regional transformation through agile and efficient strategies. It underscores the importance of integrating innovation as an intrinsic element within aviation systems and structures, ensuring its alignment with the evolving needs of the industry.

## Regional Challenges and Aspirations

Several **challenges** hindering innovation in the SAM region were identified. Key obstacles include resistance to change, the misconception that innovation is solely technology-focused, reliance on prescriptive regulatory solutions, and the unidirectional hierarchical relationship between regulators and regulated entities. These barriers highlight the need for cultural and structural changes to support innovation.

Despite these **challenges**, the SAM region has significant potential to become a leader in aviation innovation. **Aspirations** were identified to overcome these barriers, including creating collaborative frameworks between governments, industry, and academia, developing a regional forum for sharing best practices and updated information, and integrating research and development into regulatory processes. These efforts aim to position the SAM region as an innovation-friendly environment, recognized for its forward-thinking approach to aviation development.

## Strategic Guidelines

Over the next decade, the SAM region will adopt the following **strategic guidelines** to address these **regional challenges** and achieve its **aspirations**. Guided by this approach, the SAM region will focus on:

### **STRATEGIC GUIDELINE 6.1: Identify, promote, and facilitate the implementation of innovative projects.**

Innovation fosters the development of cutting-edge solutions that enhance safety, efficiency, and sustainability across the sector. This guideline allows States to address unique challenges by adopting solutions and streamlining regulatory processes. By facilitating innovation, the SAM region can strengthen its competitiveness, adapt to global trends, and ensure the long-term resilience of its aviation sector while contributing to economic and social development.

### **STRATEGIC GUIDELINE 6.2: Enhance collaboration mechanisms between States, industry and academia to exchange knowledge and promote innovation.**

This guideline bridges the gap between research and practical application, enabling the understanding and development of cutting-edge solutions and processes tailored to the Region's challenges. It also promotes regional collaboration, encouraging the exchange of ideas and best practices among stakeholders. By fostering knowledge-sharing and partnerships, it supports workforce development, generates insight for the adoption of innovative solutions, and strengthens regional competitiveness by aligning academic research with industry needs, ensuring that innovation remains a driving force in the sector's growth and modernization.

### **STRATEGIC GUIDELINE 6.3: Increase the efficiency of States' regulatory processes through innovative approaches and the use of technology.**

Streamlined regulatory processes reduce administrative burdens, enhance decision-making, and improve compliance, creating a more agile and responsive aviation sector. By leveraging technology, such as digital platforms and automation, States can optimize resource allocation, ensure transparency, and adapt to meet emerging challenges, including sustainability and evolving industry needs. This guideline fosters collaboration among stakeholders, promotes regional harmonization, and aligns States with the best global practices.



# ICAO AND SAM REGIONAL STRATEGY

## REGIONAL LEVEL WITHIN A GLOBAL CONTEXT

The SAM Regional Strategy 2035 is aligned with the ICAO Strategic Plan 2026-2050 to ensure a cohesive approach to aviation development. It fosters regional integration, enhances connectivity, and promotes the adoption of global best practices. Ultimately, it ensures the SAM region remains competitive, resilient, and prepared to meet the long-term demands of the aviation sector.

The following table illustrates the alignment between ICAO's Strategic Goals outlined in the Strategic Plan 2026-2050 and the Strategic Pillars and Strategic Dimensions of the SAM Regional Strategy 2035.

Recognizing the diverse stakeholders in the aviation system—each with distinct roles, interests, and priorities—this Strategy should serve not as a rigid roadmap but as a **coordinated framework** to address key priorities and advance the regional commitment to a more connected South America.

Aligned with international provisions and regional strategic pillars, its implementation should focus on **leveraging collaboration and commitment** to ensure effective execution. The next steps involve developing **programs, projects, activities, indicators, and targets** for initiatives that have all the elements in place to deliver the expected outcomes.

SAM REGIONAL STRATEGY 2035		ICAO STRATEGIC PLAN 2026 - 2050					
		STRATEGIC GOALS					
STRATEGIC PILLAR	STRATEGIC GUIDELINES	Every flight is safe and secure	Aviation is environmentally sustainable	Aviation delivers seamless, accessible, and reliable mobility for all	No country left behind	The international civil aviation convention and other treaties, laws and regulations address all challenges	The economic development of air transport assures the delivery of economic prosperity and societal well-being for all
<b>01: Competitiveness</b>	1.1: Balance the operational capacity with demand and improve sector efficiency of the sector.						
	1.2: Advance liberalization, reduce economic barriers and leverage from regional integration.						
	1.3: Enhance synergy between civil aviation and related industries						
<b>02: Environmental Sustainability</b>	2.1: Systematically advocate for the opportunities in the Region enabled by the LTAG.						
	2.2: Establish strategic collaboration mechanisms to engage stakeholders in advancing on the LTAG.						
	2.3: Incentivize and support the deployment of sustainable initiatives and projects in aviation.						

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03: Human Resources	3.1: Attract and develop human talent and skilled personnel for the aviation sector.						
	3.2: Adopt best practices on human talent management within CAAs.						
04: Effective Plans	4.1: Strengthen cross-sector partnerships for aviation-driven socioeconomic development.						
	4.2: Promote the modernization and integration of regional and national plans.						
05: Governance	5.1: Modernize the Legal and Regulatory Framework for Civil Aviation.						
	5.2: Implement Best Governance Practices in the CAAs.						
	5.3: Enhance the oversight and management of safety and security.						

SAM REGIONAL STRATEGY 2035		ICAO STRATEGIC PLAN 2026 - 2050					
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06: Innovation	6.1: Identify, promote, and facilitate the implementation of innovative projects.						
	6.2: Enhance collaboration mechanisms between States, industry and academia to exchange knowledge and promote innovation.						
	6.3: Increase the efficiency of States' regulatory processes through innovative approaches and the use of technology.						

