HERMES

AIR TRANSPORT ORGANISATION

THE MAGAZINE

12 | OCTOBER - DECEMBER 2020

ABDUL WAHAB TEFFAHA

Secretary General
AACO

INDEX

INDEX

EDITORIAL

Dr Kostas Iatrou
Director General
Hermes - Air Transport Organisation

Dear Hermes members,

I wish to you and your families a Happy New Year!

A challenging year ended. A year that will remain to our minds and hearts, a year that changed our way of life and affected dramatically our business. I hope that 2021 will be a better year for all.

Hermes in the last trimester of 2020 participated in the virtual assemblies of IATA, AFRAA and in the virtual conferences of ECAC and ICAO AVSEC. Hermes also presented the recommendations on Ownership and Control at the Virtual ICAO ATRP informal meeting. In December Luis Felipe de Oliveira was elected Vice President and Treasurer of the Board replacing Robert Deillon that will step down in Hermes next AGM later this year. I would like personally to thank Robert for his valuable and important contribution to Hermes from its very beginning. Robert helped establishing Hermes espousing Hermes ideas. Hermes Board selected the theme for the 2021 Recommendations and it will be: "Resilience and efficiency through Leadership and Cooperation". Now more than ever leadership and cooperation are critical for the survival and the restart of our sector.

Finally, I'm pleased to announce that Abdul Wahab Teffaha, Secretary General of AACO, is the interviewee for this issue.

Enjoy reading

Kostas Iatrou

1/10/2020

ACI PUBLISHES ALTERNATIVES TO PHYSICAL DISTANCING AT AIRPORT SECURITY CHECKPOINTS

Airports Council International (ACI World) has today released findings of simulations on the impact of applying physical distancing at airport security checkpoints which show capacity could be reduced by up to 75%. These are represented in the Security Checkpoint Modelling videos.

Working with EBEA Consulting and Transoft solutions, ACI World has designed 11 alternative measures to physical distancing keeping passengers and staff safe while, at the same time, keeping checkpoints moving when passenger traffic inevitably increases. These measures are explained in the Security Checkpoint Modelling videos, one for high throughput airports (greater than 250 pax/hour per security lane), the other for airports with a more standard flow of traffic (lower than 250 pax/hour per security lane).

1/10/2020

ICAO UPGRADES REGISTRATION SYSTEM FOR AERONAUTICAL AGREEMENTS

ICAO Secretary General Dr. Fang Liu announced the official launch of ICAO's new web-based registration system for aeronautical agreements and arrangements (WAGMAR).

The new online WAGMAR system represents a significant leap forward in user-friendliness and functionality and should improve numerous efficiencies for aviation stakeholders. For example, States will be able to manage existing registrations, create or modify agreements and automatically communicate changes with other parties.

Additionally, WAGMAR will assist States and operators in meeting the new Standard of Annex 6 requiring all aircraft operating under an Article 83 bis agreement to carry on-board an agreement summary, effective 5 November 2020. The new registration system will allow the automatic creation of this agreement summary for all aircraft under agreements registered through the system by State focal points.

Lastly, the website will be available on the ICAO public website, providing essential registration information to States, operators, safety inspectors and the public.

2/10/2020

ERA WELCOMES NEW BOARD TO FOCUS ON INDUSTRY RESCUE AND RECOVERY

European Regions Airline Association (ERA) reveals the results of its recent board elections, announced at its first ever digital Annual General Assembly (AGM).

- The results show 11 airline representatives were elected/re-elected to join the ERA Board, including a new President.
- The new ERA Board will focus on sector and industry recovery post COVID-19, champion aviation sustainability challenges, promote and support regional connectivity and campaign for continued healthy industry competition.

Representing more than 60 airlines, ERA today announced that Jan Palmer, Xfly, has been elected as President of the ERA Board to assist in directing the strategic decisions of the association during these uncertain times. He is joined by Carlos Bertomeu, Air Nostrum and Andrew Kelly, ASL Airlines Ireland who have also been re-elected and elected as Vice Presidents of the association.

6/10/2020

UNWTO AND IATA SIGN AGREEMENT TO RESTORE CONFIDENCE IN INTERNATIONAL AVIATION

World Tourism Organization (UNWTO) has signed a Memorandum of Understanding with the International Air Transport Association (IATA), as the two parties work together to restart global tourism. Highlighting UNWTO's unique status as a bridge between the UN system and the private sector, the new agreement will focus on enhancing consumer confidence in travel and placing sustainability at the centre of recovery and future growth.

6/10/2020

IATA: LOOMING CASH CRISIS THREATENS AIRLINES

The International Air Transport Association (IATA) warned that the airline industry will burn through $77 billion in cash during the second half of 2020 (almost $13 billion/month or $300,000 per minute), despite the restart of operations. The slow recovery in air travel will see the airline industry continuing to burn through cash at an average rate of $5 to $6 billion per month in 2021.

IATA called on governments to support the industry during the coming winter season with additional relief measures, including financial aid that does not add more debt to the industry's already-highly-indebted balance sheet. To date, governments around the world have provided $160 billion in support, including direct aid, wage subsidies, corporate tax relief, and specific industry tax relief including fuel taxes.

7/10/2020

ACI WORLD AND IATA IN JOINT PUSH FOR GLOBALLY CONSISTENT APPROACH TO TESTING

Airports Council International (ACI) World and the International Air Transport Association (IATA) have today made a joint call for a globally-consistent approach to testing international passengers as an alternative to quarantine measures.

The global shut down of air transport as a result of COVID-19 travel restrictions has had a catastrophic impact on employment. Some 4.8 million industry jobs have been lost or are under threat.

Governments must cooperate to remove quarantine restrictions and restart air travel. A systematic approach to COVID-19 testing will provide an effective way to give governments the confidence to re-open borders without quarantine.

The aviation industry, focused on the health and safety of passengers and their employees, has worked with the International Civil Aviation Organization's Council Aviation Recovery Taskforce (CART), which included the World Health Organization, to agree and implement a layered approach to health measures that will enable safe operations amid the COVID-19 crisis.

8/10/2020

IATA - RESEARCH POINTS TO LOW RISK FOR COVID-19 TRANSMISSION INFLIGHT

The International Air Transport Association (IATA) demonstrated the low incidence of in-flight COVID-19 transmission with an updated tally of published cases. Since the start of 2020 there have been 44 cases of COVID-19 reported in which transmission is thought to have been associated with a flight journey (inclusive of confirmed, probable and potential cases). Over the same period some 1.2 billion passengers have traveled.

Source: IATA

Change from 2018 rank	City	Country	IATA code	Passenger 2019 total	2019 vs 2018 % change	H1 2020 vs H1 2019 % change
1	Atlanta	🇺🇸	ATL	110,531,300	2.9	-56.6
2	Beijing	🇨🇳	PEK	100,011,438	-1.0	-73.6
3 ↑1	Los Angeles	🇺🇸	LAX	88,068,013	0.6	-58.9
4 ↓1	Dubai	🇦🇪	DXB	86,396,757	-3.1	-56.4
5	Tokyo	🇯🇵	HND	85,505,054	-1.7	-59.2
6	Chicago	🇺🇸	ORD	84,649,115	1.7	-57.6
7	London	🇬🇧	LHR	80,888,305	1.0	-60.2
8 ↑1	Shanghai	🇨🇳	PVG	76,153,455	2.9	-68.1
9 ↑1	Paris	🇫🇷	CDG	76,150,009	5.4	-61.4
10 ↑5	Dallas/Fort Worth	🇺🇸	DFW	75,066,956	8.6	-48.2
Aggregated top 10 airports				**863,420,402**	**1.5**	**-60.2**

8/10/2020

ACI'S WORLD AIRPORT TRAFFIC REPORT BRINGS HOME HOW FAR AIRPORT TRAFFIC HAS FALLEN

Airports Council International (ACI World) has today published its World Airport Traffic Report (WATR) along with data showing the dramatic and catastrophic impact of the COVID-19 pandemic on passenger traffic. According to the report, passenger numbers are estimated to have surpassed 9.1 billion in 2019, an increase of +3.5% compared to 2018, illustrating a healthy aviation industry before the catastrophic impact of the current pandemic.

13/10/2020

ACI AND IATA CALL FOR URGENT INDUSTRY-WIDE SUPPORT TO UNDERPIN RECOVERY

Airports Council International (ACI) World and the International Air Transport Association (IATA) reinforced the urgent call for governments to use testing as a means to safely re-open borders and re-establish global connectivity and to prevent the systemic collapse of the aviation industry with non-debt generating financial support.

The dual measures would protect countries from the importation of COVID-19 cases, avert an employment crisis in the travel and tourism sector, and ensure that the critical aviation structure remains viable and able to support the economic and social benefits on which the world relies.

Source: IATA

13/10/2020

EUROPEAN COMMISSION STATEMENT ON THE COORDINATION OF MEASURES RESTRICTING FREE MOVEMENT IN THE EUROPEAN UNION RELATED TO THE CORONAVIRUS PANDEMIC

Following the proposal of the European Commission on 4 September 2020, today EU ministers have reached an agreement that will provide more clarity and predictability on measures that restrict free movement due to the coronavirus pandemic

14/10/2020

TIACA AND PHARMA.AERO CALL FOR AN URGENT INDUSTRY COLLABORATION TO ADDRESS A CONCERNING LACK OF READINESS FOR COVID-19 VACCINES LOGISTICS

TIACA together with Pharma.Aero expressed a strong concern over the current state of air cargo readiness for the upcoming COVID-19 vaccines transportation, with only 28% of the industry feeling well prepared for it today. According to the results of our airfreight readiness survey, completed by 181 airlines, freight forwarders, ground handlers, airport operators and solution providers, majority of the industry players have begun preparation to handle,
store, transport and deliver the future COVID-19 vaccines. They are setting up dedicated teams, engaging with partners, mapping and upgrading their capabilities, as well as developing new services. As compared to companies which are already in close engagement with vaccines manufacturers, companies not involved in direct conversations with the manufacturers felt the least prepared for the upcoming logistics challenge of vaccines transportation.

14/10/2020

SLOT WAIVER EXTENSION WILL RELIEVE BURDENED SECTOR AND AVOID EMISSIONS

Today, the European Commission adopted an extension to the waiver of EU rules on the use of airport slots. As a result, airline companies can plan their flight schedules with more certainty without fear of losing their slots because of the drastic reduction in flights. Under normal circumstances, airlines have to use 80% of the slots allocated to them to secure this allocation for the next season.

A first waiver to this rule was introduced in March, when the arrival of the pandemic in Europe saw planes being grounded across the EU. Today's decision extends this waiver to cover the entire winter season, until 27 March 2021.

15/10/2020

U.S. TRANSPORTATION SECRETARY ELAINE L. CHAO ANNOUNCES HISTORIC COMMERCIAL SPACE TRANSPORTATION REFORMS

U.S. Secretary of Transportation Elaine L. Chao today announced the publication of the Federal Aviation Administration's (FAA) Streamlined Launch and Reentry Licensing Requirements Final Rule for commercial space transportation launches and reentries. This rule modernizes the way FAA regulates and licenses commercial space operations and allows the burgeoning aerospace industry to continue to innovate and grow, while maintaining public safety.

Source: US DOT

16/10/2020

CANSO REAFFIRMS COMMITMENT TO ATM RECOVERY

Civil Air Navigation Services Organisation (CANSO) unites 186 air traffic management (ATM) service providers and suppliers in committing to support the safe and seamless recovery of aviation through strong leadership and a new advocacy resolution. At its virtual 24th Annual General Meeting, CANSO announced the appointment of a new Executive Committee chair, Captain Gilbert Macharia Kibe, who currently serves as Director General of Kenya Civil Aviation Authority (KCAA). During the AGM, CANSO also launched a new advocacy priority to help the industry navigate the current aviation crisis. The commitment is to provide the policy and framework guidance to ensure the emergence of the ATM industry from the current pandemic a stronger and more resilient industry, well placed to continue to serve the evolving needs of managing safety and efficiency in our skies. This resolution is added to CANSO's existing priorities of enhancing the public perception of ATM; ensuring good regulatory practices; supporting operational standards that enhance ATM performance; promoting airspace modernisation for enhanced efficiency and to accommodate challenges of new entrants; and supporting a collaborative approach to industry challenges.

canso

20/10/2020

AVINOR: THE WORLD'S LARGEST REMOTE TOWERS CENTRE OPENS IN NORWAY

Aviation is the backbone of Norwegian infrastructure and ensures connectivity across vast distances. Avinor's new Remote Towers Centre located in Bodo, north of the Arctic Circle, will play an important role in maintaining a sustainable aviation structure in the future. This is a result of the collaboration between Avinor and KONGSBERG, where the companies have utilized complementing areas of expertise in order to build a system which will strengthen the aviation sector.

Source: Avinor

27/10/2020

AIRLINES UNABLE TO CUT COSTS DEEP ENOUGH TO SAVE JOBS

The International Air Transport Association (IATA) presented new analysis showing that the airline industry cannot slash costs sufficiently to neutralize severe cash burn to avoid bankruptcies and preserve jobs in 2021. IATA reiterated its call for government relief measures to sustain airlines financially and avoid massive employment terminations. IATA also called for pre-flight COVID-19 testing to open borders and enable travel without quarantine.

Total industry revenues in 2021 are expected to be down 46% compared to the 2019 figure of $838 billion. The previous analysis was for 2021 revenues to be down around 29% compared to 2019. This was based on expectations for a demand recovery commencing in the fourth quarter of 2020. Recovery has been delayed however, owing to new COVID-19 outbreaks, and government mandated travel restrictions including border closings and quarantine measures. IATA expects full year 2020 traffic to be down 66% compared to 2019, with December demand down 68%.

27/10/2020

WMO AND IATA AGREE TO IMPROVE AIRCRAFT METEOROLOGICAL REPORTING

The International Air Transport Association (IATA) and World Meteorological Organization have signed an agreement to increase and improve the automated reporting of meteorological data by commercial aircraft.

The new initiative, called the WMO and IATA Collaborative AMDAR Programme (WICAP), aims to expand the existing WMO Aircraft Meteorological Data Relay (AMDAR) system to ensure coverage over data-sparse areas. It is expected to bring many additional and new partner airlines into the program, which is already supported by approximately 40 airlines and covers several thousand passenger and cargo aircraft.

29/10/2020

UNITED AIRLINES LAUNCHES WORLD'S FIRST FREE TRANSATLANTIC COVID-19 TESTING PILOT

United Airlines today announced the world's first free transatlantic COVID-19 testing pilot program for customers. From November 16 through December 11, the airline will offer rapid tests to every passenger over 2 years old and crew members on board select flights from Newark Liberty International Airport (EWR) to London Heathrow (LHR), free of charge. Anyone who does not wish to be tested will be placed on another flight, guaranteeing everyone on board other than children under two will have tested negative before departure.

29/10/2020

IATA UPGRADES TRAVEL INDUSTRY DESIGNATOR SERVICE (TIDS)

The International Air Transport Association (IATA) has enhanced its Travel Industry Designator Service (TIDS) and will also no longer charge travel agencies to use the service. With the improved overall user experience, agencies can now self-manage their profile online, simplifying the processes for both themselves and the travel suppliers.

TIDS is an IATA program which provides a unique identification code for travel agents and sales intermediaries (such as meeting planners and event organizers) who are not IATA-Accredited Agents and are located outside of the USA. As new booking sources and platforms emerge in the distribution space, industry suppliers face a growing challenge in identifying booking and sales intermediaries. In response, IATA with the support of its airline members, has revamped the TIDS program to better address the needs of the industry and make TIDS the standard of identification for non-IATA Accredited agencies.

29/10/2020

AVIATION: NEW PERFORMANCE REVIEW BODY ANNUAL MONITORING REPORT 2019 SUPPORTS IMPLEMENTATION OF SINGLE EUROPEAN SKY PERFORMANCE AND CHARGING SCHEME

The Performance Review Body (PRB) supports the European Commission in implementing the Single European Sky's (SES) performance and charging scheme.

The 2019 PRB Annual Monitoring Report offers an in-depth assessment of the performance of monopolistic air navigation service providers (ANSPs) subject to Union law. As 2019 was the final year of the second reference period (RP2) that had started in 2015, this year's edition also includes an assessment of the entire RP2.

The PRB's key conclusions and recommendations, as outlined in the report, support the reform of the Single European Sky. Concerning safety in the air and on the ground, the report highlights how Member States and ANSPs operated safely throughout RP2. Environmental performance attributed to air traffic management remained however an issue throughout RP2, as the shortest routes were not always offered to airlines.

31/10/2020

WELCOME TO BER / BERLIN BRANDENBURG AIRPORT WILLY BRANDT STARTS OPERATIONS

The new Terminal 1 at Berlin Brandenburg Airport Willy Brandt (BER) was opened today with the landing of the first two aircraft operated by easyJet and Lufthansa. Upon arrival, the passengers, including easyJet CEO Johan Lundgren and Lufthansa CEO Carsten Spohr, were welcomed in Terminal 1 by the head of the airport company, Engelbert Lütke Daldrup. The symbolic opening act took place in a small circle and was also attended by the Minister-President of the State of Brandenburg, Dietmar Woidke, the Governing Mayor of Berlin, Michael Müller, the Federal Minister of Transport and Digital Infrastructure, Andreas Scheuer MdB, and the Chairman of the Supervisory Board of the airport company, Rainer Bretschneider. The first commercial flights will arrive at Terminal 1 in the evening, while the first easyJet flight to London Gatwick will depart from here in the morning of 1 November.

Source: Flughafen Berlin Brandenburg GmbH

5/11/2020

AIRPORTS COUNCIL INTERNATIONAL (ACI WORLD) HAS TODAY PUBLISHED THE AIRPORT SECURITY RISK ASSESSMENT HANDBOOK WHICH ASSISTS AIRPORTS IN UNDERSTANDING THREATS, ASSESSING ASSOCIATED RISKS, AND ALLOCATING RESOURCES WHERE THEY ARE MOST NEEDED

Airports Council International (ACI World) has today published the Airport Security Risk Assessment Handbook which assists airports in understanding threats, assessing associated risks, and allocating resources where they are most needed

Amid the challenges faced by the industry during COVID-19, security remains a top priority. Airports need to meet security standards and be able to manage security effectively in an environment of constrained resources which could include funding, staff levels, and time.

ACI identified that risk assessment can be over-complicated, with unrealistic assumptions made about potential vulnerabilities. The handbook provides a step by step breakdown of a risk assessment process and has been developed in response to industry requests for updated guidance. The new handbook covers:

- guidance on best practices and methodologies that can be applied to security risk assessment to help airports prioritize and manage risks
- a case study on insider threat, and examples from airports on how risk assessments are conducted, and
- global best practices and real-life experience from ACI's member airports and experts in the field.

8/11/2020

#DANKETXL: BERLIN BIDS FAREWELL TO TXL / TEGEL AIRPORT CEASES OPERATIONS AFTER FINAL DEPARTURE BY AIR FRANCE

Today, Sunday 8 November 2020, Air France flight AF1235 was the last-ever flight to depart from Berlin Tegel "Otto Lilienthal" Airport, or TXL for short. At 3.00 p.m., an Air France Airbus A320-200 took off bound for Paris Charles de Gaulle airport. Following the last departure and the end of operations at TXL, the area was symbolically handed over to the city. In line with the zoning decision for Berlin Brandenburg Airport (BER), TXL will be kept in operating condition for a further six months from the date of the complete commissioning of BER. During this period, however, no more flights will take place in Tegel.

Source: Flughafen Berlin Brandenburg GmbH

9/11/2020

ICAO AND THE INTERNATIONAL FORUM FOR AVIATION RESEARCH (IFAR) FORMALIZED A NEW AGREEMENT AIMED AT ACCELERATING AND IMPROVING THE EFFECTIVE ASSESSMENT OF NEW AVIATION TECHNOLOGIES AND INNOVATIONS

ICAO and the International Forum for Aviation Research (IFAR) formalized a new agreement aimed at accelerating and improving the effective assessment of new aviation technologies and innovations.

The agreement establishes two new ICAO-IFAR Expert Groups which will review latest innovations in the areas of urban air mobility and AI in aviation. After their first year, each group will report back to ICAO and IFAR and the two organizations will use the findings to optimize and formalize IFAR's future contributions to ICAO and international aviation.

9/11/2020

ICAO COUNCIL ENDORSES NEW UPDATES TO COVID-19 GLOBAL AVIATION RECOVERY GUIDELINES

The ICAO Council endorsed new updates yesterday to its Aviation Recovery Task Force's (CART's) 'Take-off' Guidelines for international air transport. The new guidelines provide recommendations for countries to consider adopting per their current local medical status, and on specific priorities including general hygiene, masks and face coverings, health screening and declarations, air passengers with reduced mobility, and the mental health and well-being of aviation workers and passengers.

They also reacknowledge the sovereignty and authority of each country over its national pandemic recovery priorities, including with respect to the evaluation and use of passenger testing to help alleviate quarantine measures and reconnect destinations globally.

10/11/2020

AIRLINES AND AIR TRANSPORT WORKERS CALL FOR URGENT GOVERNMENT ASSISTANCE TO PREVENT JOBS CATASTROPHE

The International Air Transport Association (IATA) and the International Transport Workers' Federation (ITF) issued a joint statement calling for urgent government intervention to prevent an employment catastrophe in the aviation industry. Estimates from the Air Transport Action Group suggest some 4.8 million aviation workers' jobs are at risk as a result of air travel demand falling more than 75% (August 2020 compared to August 2019). The impact of COVID-19 related border restrictions and quarantine measures has effectively closed down the aviation industry, grounding planes and leaving infrastructure and aircraft manufacturing capacity idle. The IATA and the ITF request to governments includes calls to:

- Provide continued financial support for the aviation industry
- Safely re-open borders without quarantine by implementing a globally harmonized system of pre-departure COVID-19 testing.

11/11/2020

ONEWORLD, SKYTEAM AND STAR ALLIANCE SUPPORT A GLOBALLY HARMONISED APPROACH TO HEALTH TESTING TO BUILD A FRAMEWORK OF TRUST

World's airline alliances join together to call on international governments to act quickly to adopt testing protocols and digital health pass technology to reopen borders. The three global airline alliances, oneworld, SkyTeam and Star Alliance, are in full support of the International Civil Aviation Organization's (ICAO) second-phase Council on Aviation Recovery Task Force (CART) report released on 10 November. Together, they urge governments to implement the report guidelines for passenger testing protocols, as well as the adoption of digital health pass technology, so air travel may safely resume. Government-imposed travel and entry restrictions continue to significantly impact global travel demand. Meanwhile, COVID-19 testing has emerged as an important part of an end-to-end solution to enable the safe restart of international travel by potentially reducing the reliance on the blunt instrument of blanket quarantines.

11/11/2020

GLYN HUGHES TO TAKE THE REINS OF TIACA AS ITS FIRST DIRECTOR GENERAL

The International Air Cargo Association (TIACA) announced that Glyn Hughes will take the newly created role of Director General of the association. He will manage the team, work with the Board of Directors, the members and the industry partners to establish and implement TIACA's vision and strategic objectives and advance the overall cargo agenda. Hughes is set to start his tenure at TIACA in February 2021.

Source: TIACA

12/11/2020

ACI WORLD ANNUAL GENERAL ASSEMBLY RESOLUTION SUPPORTS INDUSTRY RECOVERY

Airports Council International (ACI) World Annual General Assembly has published a resolution pledging support for the industry in recovering from the COVID-19 pandemic.

Aviation is major catalyst in supporting growth in other industries and is essential to the social and economic welfare across the world; it will be a key driver of the global economic recovery. The pandemic has had a devastating economic and social impact on aviation and airports, however.

At this year's ACI World General Assembly, a resolution was adopted to support recovery by urging airports to implement best practices for the accommodation of health measures in accordance with global and regional guidance, based on ACI's Airport Health Accreditation programme, which is supported by ICAO.

Key to this will be working with international, national, and regional health authorities to develop consistent and effective protocols for prospective travellers. These may include testing, ensuring that measures are simple, practical, and based on medical evidence, and encouraging States to recognize equivalency of measures and take a risk-based approach to travel restrictions and new process requirements.

13/11/2020

AFCAC, IATA AND AFRAA JOIN FORCES TO PROMOTE AVIATION SAFETY AND CONNECTIVITY ACROSS AFRICA

The International Air Transport Association (IATA) and African Airlines Association (AFRAA) have joined forces with the African Civil Aviation Commission (AFCAC) on a three-year safety project. The objective is to provide technical support to the African air operators of states party to the Single Africa Air Transport Market (SAATM) to ensure that they achieve and maintain global aviation safety standards.

Launched today, the initiative is backed by African Development Bank grant funding provided to AFCAC and is specifically for carriers in countries that have signed up to the African Union's (AU) flagship Single African Air Transport Market (SAATM) program.

13/11/2020

AIRPORT SLOT ALLOCATION POLICIES SHOULD SUPPORT THE RECOVERY OF AIR TRANSPORT

In a resolution, the Airports Council International (ACI) World Annual General Assembly has declared that airport slot allocation policies should support the recovery of air transport.

Airport connectivity is essential for the recovery of air transport, and will be a key driver of the wider global economic recovery and ACI World urges airport operators, airlines and slot coordinators to work together and to increase their collaboration in setting and maintaining a harmonized slot allocation process.

Historically, more than 200 airports worldwide have declared insufficient capacity to meet airlines' demand for flights, especially at peak times and airports may be subject to capacity reduction in the recovery phase of the COVID-19 pandemic because of government regulations, physical infrastructure limitations, or commercial considerations.

ACI World has called upon aviation oversight authorities to recognize the Worldwide Airport Slot Guidelines when designing, implementing and evaluating slot allocation policies and promote an evidence-based and data-driven approach to determine slot policies that support the recovery of air traffic.

13/11/2020

EUROPEAN COMMISSION TO EXTEND SELECT MEASURES FOR CORONAVIRUS-HIT AVIATION SECTOR

In response to coronavirus measures that saw planes grounded around the EU, the Commission adopted rules amending parts of the Air Services Regulation in May. The amendments allow:

- airlines in temporary financial difficulty to keep their operating licence;
- groundhandlers whose contracts expire before the end of 2021 to keep them until 2022,

making it easier for them to access loans;
- airports to urgently replace their groundhandling service provider should it suddenly go bankrupt;
- Member States to maintain flight restrictions if necessary.

The new report recommends extending the derogations linked to operating licences and the selection of groundhandlers, due to expire on 31 December 2020, by one year. This is justified by the ongoing pandemic and its impact on air traffic, which is likely to continue into 2021.

The Commission does not consider at this stage that an extension of the current derogation allowing the lengthening of groundhandling contracts until 31 December 2022 is necessary, but will continue to monitor the situation.

16/11/2020

QUEENSLAND AND NORTHERN TERRITORY AERIAL SERVICES (QANTAS) TODAY MARKS 100 YEARS SINCE IT WAS FOUNDED IN THE AUSTRALIAN OUTBACK

On 16 November 1920, two veterans of the Australian Flying Corps, Hudson Fysh and Paul McGinness, together with local grazier Fergus McMaster, founded what would later become the national carrier.

16/11/2020

ACI WORLD ANNUAL GENERAL ASSEMBLY URGES GLOBAL CLIMATE CHANGE EFFORT

In a resolution, the Airports Council International (ACI) World Annual General Assembly has emphasized that climate change, adaptation, and resilience should be included in airport recovery plans and remain key issues for the sector despite the pandemic.

Climate change is a global challenge that requires worldwide collaboration and action.

ACI World recognizes the unprecedented impact of COVID-19 on the aviation sector and that the entire sector will need a supportive regulatory framework in which to recover.

The ACI World Annual General Assembly has resolved to urge governments to support airports recovery by providing policies, investment, and incentives to decarbonize the sector and make it more resilient. Furthermore, airports should keep climate mitigation, adaptation and resilience as key parts of their strategies and recovery plans and identify opportunities to 'build back better' by keeping sustainability and resilience at the core of their recovery strategies.

16/11/2020

EU AVIATION MAPS A SUSTAINABLE, POST-CRISIS FUTURE IN ROUND TABLE REPORT

Over 20 associations collectively representing the entire European aviation ecosystem have announced a joint commitment to work with policy makers to achieve net zero CO_2 emissions by 2050, part of a comprehensive collaborative analysis released today detailing ways aviation can recover sustainably and more resiliently from the COVID-19 crisis whilst supporting the European Union's Green Deal objectives.

Calling for a comprehensive Aviation Relief Programme to rebuild the sector, the authors of the Aviation Round Table Report note the critical importance of restoring the public's confidence in aviation as a key priority and urgent prerequisite in ensuring recovery. In addition, the report highlights maintaining connectivity, skills and employment and preserving the European internal market and its competitiveness as vital to ensuring aviation's recovery from COVID-19, improving its governance and making European aviation more resilient to future shocks.

Aviation Round Table Report on the Recovery of European Aviation — November 2020
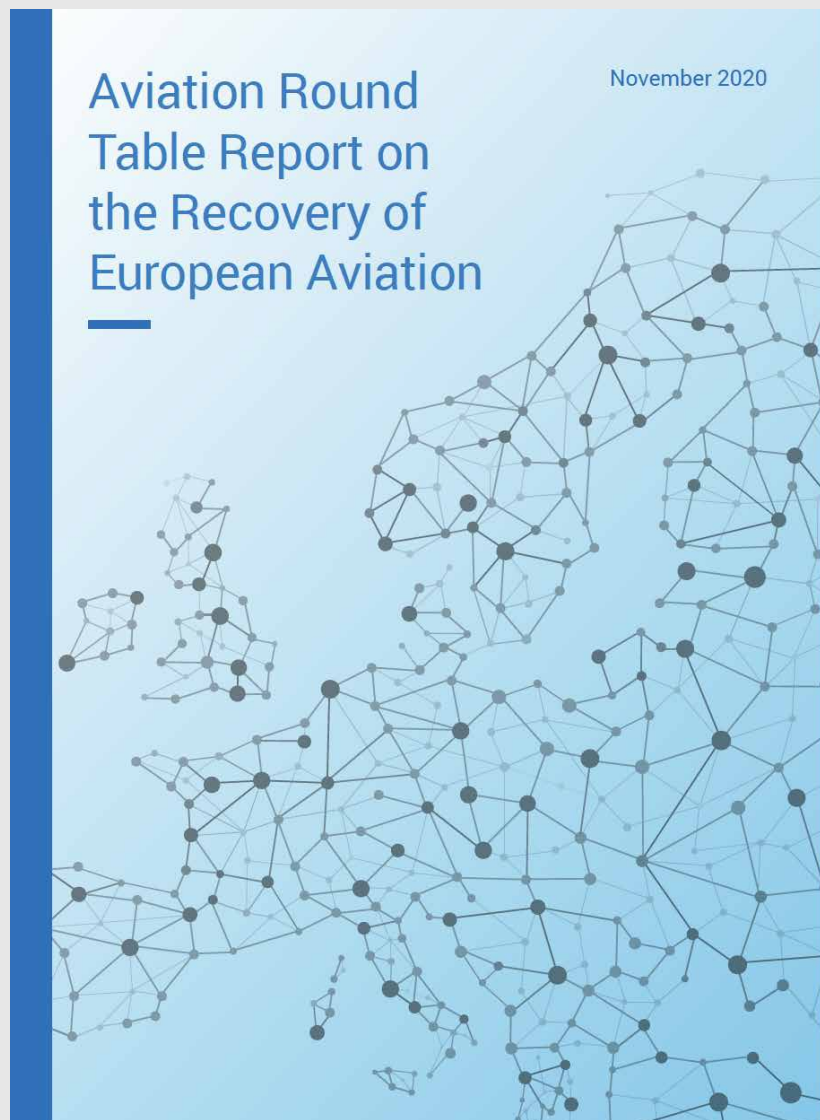
17/11/2020

STAR ALLIANCE BIOMETRICS IS LAUNCHED AT FRANKFURT AND MUNICH

Star Alliance, the world's largest airline alliance, has completed development of an interoperable biometric identity and identification platform that will significantly improve the travel experience for frequent flyer programme customers of Star Alliance member airlines.

The Star Alliance Biometrics platform advances the vision of Star Alliance member airlines of delivering a seamless customer journey, while strengthening loyalty value proposition within its travel ecosystem.

Source: Lufthansa

17/11/2020

AIRPORTS REVEAL STEP-CHANGE IN CONTINUED PROGRESS TOWARDS DECARBONISATION AS NEW AIRPORT CARBON ACCREDITATION LEVELS ARE ANNOUNCED

ACI has today unveiled two further levels of achievement in its global Airport Carbon Accreditationprogramme, marking the industry's determination to 'Build Back Better' as it looks towards recovery. Introducing Level 4 Transformation and Level 4+ Transition The introduction of these two new levels marks a shift in the ambition level of the programme. CO2emissions reductions and continuous improvements have been at the core of Airport Carbon Accreditationsince launch. Level 1 Mapping through to Level 3+ Neutrality do allow for flexibility in the magnitude of reductions achieved.

By contrast, Levels 4 and 4+ set out further obligations - namely:

• Alignment with the Paris Agreement: requiring airports to align their carbon management strategies and plans with the ambition of the Paris Agreement, according to which global warming should be limited to below 2°C and ideally 1.5°C. These objectives have been translated into emissions reduction scenarios by the Intergovernmental Panel on Climate Change (IPCC), and airports will have to define

17/11/2020

AIRPORTS REVEAL STEP-CHANGE IN CONTINUED PROGRESS TOWARDS DECARBONISATION AS NEW AIRPORT CARBON ACCREDITATION LEVELS ARE ANNOUNCED (*cont'd*)

- their reduction targets and associated emissions pathways accordingly.
- Extended carbon footprint: additional emissions sources have to be included, notably covering all significant operational emissions from third parties, including airlines.
- Enhanced stakeholder engagement: requirements related to stakeholder engagement are tightened, with effective partnerships oriented towards delivering emissions reductions coming to the fore.

17/11/2020

UNITED STATES AND THE UNITED KINGDOM SIGN NEW OPEN SKIES AGREEMENT

The United States and the United Kingdom today completed the signature of the Air Transport Agreement (the Agreement) between the Government of the United States of America and the Government of the United Kingdom of Great Britain and Northern Ireland. Secretary of Transportation Elaine L. Chao and Secretary of State Mike Pompeo signed the Agreement for the United States. Secretary of State for Transport Grant Shapps signed the Agreement for the United Kingdom.

18/11/2020

FAA STATEMENT ON BOEING 737 MAX RETURN TO SERVICE

FAA Administrator Steve Dickson today signed an order that paves the way for the Boeing 737 MAX to return to commercial service. Administrator Dickson's action followed a comprehensive and methodical safety review process that took 20 months to complete. During that time, FAA employees worked diligently to identify and address the safety issues that played a role in the tragic loss of 346 lives aboard Lion Air Flight 610 and Ethiopian Airlines Flight 302. Throughout our transparent process, we cooperated closely with our foreign counterparts on every aspect of the return to service. Additionally, Administrator Dickson personally took the recommended pilot training and piloted the Boeing 737 MAX, so he could experience the handling of the aircraft firsthand.

19/11/2020

EU EXPANDS BILATERAL AVIATION SAFETY AGREEMENT WITH THE UNITED STATES TO COVER PILOT LICENCES AND FLIGHT SIMULATORS

The European Union und the United States of America today signed two new Annexes to the Agreement on Cooperation in the Regulation of Civil Aviation Safety (BASA), expanding its areas of application to allow the conversion of pilot licences and to reduce duplication in the oversight of flight simulators.

On pilot licencing, the new Annex will ensure that pilots residing in the EU fly aircraft on the basis of licences and ratings issued in accordance with EU regulations, under the oversight of EU Member States. It will also ensure that they maintain and develop their qualifications via EU training organisations. The objective of the new Annex is to convert certain US pilot licences into EU Part-FCL licences and ratings, while taking account of the similarities between the US and EU regulatory systems. This is a cost-effective solution to converting FAA pilot licences into EU Part-FCL licences. Several thousand EU pilots are expected to take advantage of the new provisions and complete the conversion of their FAA pilot licences and ratings.

The second new BASA Annex, on flight simulation training devices, will allow for the reciprocal acceptance of findings of compliance, as well as documentation, on the recurrent evaluation and qualification of EU- and U.S.-based full flight simulators. It will generate resource savings, in particular by eliminating duplicate evaluations by the European Union Aviation Safety Agency (EASA) and the US Federal Aviation Administration (FAA). The aviation industry will also see costs fall: the operators of flight simulation training devices will no longer be subject to multiple re-evaluations, and these savings can be passed on to air carriers sending pilots for training.

23/11/2020

NEW MANUAL ISSUED ON COVID-19 TESTING AND CROSS-BORDER RISK MANAGEMENT

ICAO issued a bulletin today announcing its new Testing and Cross-border Risk Management Measures Manual (Doc 10152), developed by the members of the dedicated CAPSCA group it established in 2009 for the prevention and management of public health events in civil aviation.

The new publication is available free of charge on the UN agency's COVID-19 online portal, along with the comprehensive guidelines, tools and resources it has been putting at countries' disposal since the onset of the pandemic.

23/11/2020

ACI PARTNERS WITH BUREAU VERITAS TO INTRODUCE AN AIRPORT HEALTH MEASURES AUDIT PROGRAMME BASED ON THE SAFEGUARDTM STANDARDS TO SUPPORT AIRPORTS RECOVERY

Airports Council International (ACI) World announced today a partnership with Bureau Veritas, world leader in testing, inspection and certification to propose to airports, all around the world, an Audit Programme to ensure the proper implementation of appropriate health & safety measures.

The COVID-19 pandemic has brought airports to a virtual standstill. To support the airport industry recovery, a commitment to the health and welfare of travellers, staff and the public is key.

The Airport Health Measures Audit Programme aims to support airport operators by addressing their specific risks and by reassuring passengers. The on-site audits, conducted by Bureau Veritas, and the associated Safe-GuardTM label will enable airports to demonstrate their compliance with a harmonized set of measures, aligned with the recommendations of national and international authorities.

23/11/2020

IATA DG TO STEP DOWN

The International Air Transport Association (IATA) announced that Alexandre de Juniac, Director General and CEO will step down from his role at the Association effective 31 March 2021.

De Juniac made known his intention to step down from the Association several months ago which enabled a search process to facilitate a smooth leadership transition. The IATA Board of Governors will recommend to the 76thIATA Annual General Meeting (AGM) on 24 November 2020 the appointment of Willie Walsh, former CEO of International Airlines Group (IAG) to become IATA's eighth Director General from 1 April 2021.

Source: IATA

23/11/2020

IATA TRAVEL PASS KEY TO REOPENING BORDERS SAFELY

The International Air Transport Association (IATA) announced that it is in the final development phase of the IATA Travel Pass, a digital health pass that will support the safe reopening of borders.

Governments are beginning to use testing as a means of limiting the risks of COVID-19 importation when re-opening their borders to travelers without quarantine measures. IATA Travel Pass will manage and verify the secure flow of necessary testing or vaccine information among governments, airlines, laboratories and travelers.

IATA is calling for systematic COVID-19 testing of all international travelers and the information flow infrastructure needed to enable this must support:

23/11/2020

IATA TRAVEL PASS KEY TO REOPENING BORDERS SAFELY *(cont'd)*

- Governments with the means to verify the authenticity of tests and the identity of those presenting the test certificates.
- Airlines with the ability to provide accurate information to their passengers on test requirements and verify that a passenger meets the requirements for travel.
- Laboratories with the means to issue digital certificates to passengers that will be recognized by governments, and;
- Travelers with accurate information on test requirements, where they can get tested or vaccinated, and the means to securely convey test information to airlines and border authorities.

24/11/2020

IATA AGM CALLS FOR REOPENING BORDERS WITH TESTING AND WITHOUT QUARANTINE

The International Air Transport Association (IATA) 76th Annual General Meeting (AGM) unanimously resolved to urgently call on governments to re-open borders to travel. IATA is proposing systematic testing of international travelers which would permit the lifting of border restrictions and provide an alternative to current quarantine rules.

Quarantines essentially kill demand for air travel and governments need to immediately consider the drastic socio-economic effect this is having.

International air travel continues to be down 90% on 2019 levels.

Current estimates are that as many as 46 million jobs supported by air travel could be lost and that the economic activity sustained by aviation will be reduced by US $1.8 trillion.

24/11/2020

CHRISTCHURCH AIRPORT IN NEW ZEALAND BECOMES WORLD'S FIRST AIRPORT TO ACHIEVE LEVEL 4 TRANSFORMATION OF THE GLOBAL AIRPORT CARBON ACCREDITATION PROGRAMME

Christchurch Airport in New Zealand has taken a major step forward in its commitment to fight against climate change, becoming the first airport in the Asia-Pacific region and in the world to reach Level 4 Transformation of Airport Carbon Accreditation. This high achievement is evidence of the airport's continued efforts to align its carbon management strategy with the global climate goals. It also follows ACI's recent announcement of the introduction of two further levels of accreditation in its global Airport Carbon Accreditation programme (Level 4 Transformation and Level 4+ Transition) to mark the industry's ongoing commitment to 'Build Back Better'

25/11/2020

INTERNATIONAL AIR CONNECTIVITY CRISIS THREATENS GLOBAL ECONOMIC RECOVERY

The International Air Transport Association (IATA) released data revealing that the COVID-19 crisis has had a devastating impact on international connectivity, shaking up the rankings of the world's most connected cities.

- London, the world's number one most connected city in September 2019, has seen a 67% decline in connectivity. By September 2020, it had fallen to number eight.
- Shanghai is now the top ranked city for connectivity with the top four most connected cities all in China—Shanghai, Beijing, Guangzhou and Chengdu.
- New York (-66% fall in connectivity), Tokyo (-65%), Bangkok (-81%), Hong Kong (-81%) and Seoul (-69%) have all exited the top ten.
- The study reveals that cities with large numbers of domestic connections now dominate, showing the extent to which international connectivity has been shut down.

25/11/2020

IATA LAUNCHES NEW EXCHANGE FOR OFFSETS TRADING

The International Air Transport Association (IATA) has launched the Aviation Carbon Exchange (ACE), an important new tool to help airlines meet their climate commitments.

- ACE is the first centralized, real-time marketplace that is integrated with the IATA Clearing House (ICH) for the settlement of funds on trades in carbon offsets.
- IATA's Clearing House ensures that ACE can offer a seamless and secure settlement system which guarantees payment and delivery of the carbon credits.
- JetBlue Airways is the first airline that made the historic transaction in the ACE platform.

26/11/2020

AVIATION INDUSTRY AGREES VITAL SLOT USE RELIEF

The Worldwide Airport Slot Board (WASB), comprising Airports Council International (ACI World), the International Air Transport Association (IATA), and the Worldwide Airport Coordinators Group (WWACG) released a joint recommendation for airport slot use relief for the northern summer 2021 season.

The organizations called on regulators worldwide to temporarily adopt more flexible slot rules in line with the recommendation as quickly as possible in order to preserve essential air transport connectivity.

As a result of the collapse in demand from the COVID-19 crisis, some 65% of direct city pair connections vanished in the first quarter of 2020. Slot-regulated airports serve almost half of all passengers and are the backbone of the global scheduled airline network. But recovery is impossible while there is no certainty on the rules governing the use and retention of airport slots.

25/11/2020

IATA CALLS ON GOVERNMENTS TO SUPPORT INDUSTRY MOVE TO SAF

The International Air Transport Association (IATA) called on governments worldwide to support the development of Sustainable Aviation Fuel (SAF) as a critical step to achieving its target to cut net emissions to half 2005 levels by 2050. This target was reinforced by a resolution at IATA's 76th Annual General Meeting yesterday which also commits the industry to exploring pathways to net zero emissions.

26/11/2020

FLYDUBAI LANDS IN TEL AVIV

The first scheduled commercial flight operated by flydubai from Dubai International (DXB) landed at Tel Aviv Ben Gurion International Airport (TLV) on Thursday 26 November to a water salute. The inaugural flight was flown by Captain Patrick Gonzenbach and Emirati First Officer, Abdulla Al Shamsi.

On board the aircraft was a delegation led by Ghaith Al Ghaith, Chief Executive Officer, flydubai. They were met on arrival by Israeli Prime Minister Benjamin Netanyahu, along with a delegation that included the CEO of Ben Gurion International Airport Shmuel Zakay and representatives from the aviation industry.

Source: flydubai

26/11/2020

CORSIA OFFSETTING KEPT ON TRACK FOR 2021 PILOT PHASE

Efforts to offset emissions from international flights have been kept on track during the current 221st Session of the ICAO Council, with new decisions being adopted by the 36-country body on eligibility units and sustainability certification schemes supporting the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA).

The latest Council endorsements mean that all implementation elements for CORSIA are now complete, and that everything is prepared for the start of its pilot phase in 2021.

2/12/2020

TRAVELLERS SHOULD NOT BE TREATED AS HIGH-RISK FOR COVID-19 – ECDC/EASA GUIDELINES SAY

People travelling during the COVID-19 pandemic should not automatically be considered as high-risk for spreading infection, but should rather be treated in the same way as members of the local population who have not had any direct contact to a person infected with COVID-19, new European guidelines for air travel said.

The Guidelines for COVID-19 Testing and Quarantine of Air Travellers were published jointly by the European Centre for Disease Prevention and Control (ECDC) and the European Union Aviation Safety Agency (EASA) on the request of the European Commission. The document forms an Addendum to the Aviation Health Safety Protocol first published in May 2020.

27/11/2020

TIACA BOARD BIDS FAREWELL TO OUTGOING VLADIMIR ZUBKOV

The International Air Cargo Association (TIACA) bids farewell to Vladimir Zubkov, Secretary General of TIACA from January 2017 to August 2020 and Special Advisor to the Board on Industry Affairs since September 2020.

Thanks to his 40 years' experience in the air transport industry, Zubkov has been instrumental in building and nurturing TIACA's relationships with the regulators and key international organizations, especially ICAO, IATA, the World Customs Organization (WCO), the World Trade Organization (WTO), the United Nations Conference on Trade and Development (UNCTAD), freight forwarder organizations, Airports Council International (ACI), and all other partners, to ensure greater recognition of the importance of air cargo industry and that the new regulations are implemented in a uniform way across the industry.

2/12/2020

AIRLINES AND AIRPORTS CALL ON EU/EEA AND UK GOVERNMENTS TO IMMEDIATELY ABOLISH PASSENGER QUARANTINES AS EASA/ECDC GUIDELINES CONFIRM THEIR INEFFECTIVENESS

European and international aviation associations are urging European governments to immediately abolish quarantine measures and other travel restrictions following new Recommendations published by EASA and the European Centre for Disease Prevention & Control (ECDC), which unequivocally reject their use in the current situation – where transmission of the virus is already widespread.

2/12/2020

U.S. DEPARTMENT OF TRANSPORTATION ANNOUNCES FINAL RULE ON TRAVELING BY AIR WITH SERVICE ANIMALS

The U.S. Department of Transportation today announced that it is revising its Air Carrier Access Act (ACAA) regulation on the transportation of service animals by air to ensure a safe and accessible air transportation system.

The final rule:

- Defines a service animal as a dog that is individually trained to do work or perform tasks for the benefit of a person with a disability;
- No longer considers an emotional support animal to be a service animal;
- Requires airlines to treat psychiatric service animals the same as other service animals;
- Allows airlines to require forms developed by DOT attesting to a service animal's health, behavior and training, and if taking a long flight attesting that the service animal can either not relieve itself, or can relieve itself in a sanitary manner;
- Allows airlines to require individuals traveling with a service animal to provide the DOT service animal form(s) up to 48 hours in advance of the date of travel if the passenger's reservation

was made prior to that time;

- Prohibits airlines from requiring passengers with a disability who are traveling with a service animal to physically check-in at the airport instead of using the online check-in process;
- Allows airlines to require a person with a disability seeking to travel with a service animal to provide the DOT service animal form(s) at the passenger's departure gate on the date of travel;
- Allows airlines to limit the number of service animals traveling with a single passenger with a disability to two service animals;
- Allows airlines to require a service animal to fit within its handler's foot space on the aircraft;
- Allows airlines to require that service animals be harnessed, leashed, or tethered at all times in the airport and on the aircraft;
- Continues to allow airlines to refuse transportation to service animals that exhibit aggressive behavior and that pose a direct threat to the health or safety of others; and
- Continues to prohibit airlines from refusing to transport a service animal solely based on breed.

3/12/2020

RYANAIR ORDERS 75 BOEING MAX-8200 AIRCRAFT (210 IN TOTAL)

Ryanair today (3 Dec. 2020) signed a purchase agreement with Boeing for 75 new MAX-8200 aircraft, which increases its firm order for the Boeing "Gamechanger" aircraft from 135 to 210, with a total value of over $22bn.

Now that the Boeing MAX aircraft has been certified by the FAA to return to service, Ryanair expects to take the first deliveries of these new fuel efficient and environmentally friendly aircraft from early 2021, and has con-

firmed 210 firm orders with Boeing for these gamechanger aircraft, which will be delivered over

a 4-year period between Spring 2021 and December 2024.

Source: Ryanair

4/12/2020

EASA AND CAAS DEEPEN COOPERATION TO MAKE AIRCRAFT TYPE CERTIFICATION PROCESS MORE EFFICIENT FOR INDUSTRY

The European Union Aviation Safety Agency (EASA) and Civil Aviation Authority Singapore (CAAS) have updated their bilateral Working Arrangement to facilitate CAAS' validation of EASA aircraft type certifications.

The amendment to the Working Arrangement on Airworthiness Certification will allow the two regulators to collaborate on facilitating aviation innovations, such as electric-vertical take-off and landing (eVTOL) aircraft. With immediate effect, CAAS will be able to validate EASA design approvals concurrently and in close coordination with EASA's type certification process. It will help aviation companies in Singapore to innovate and benefit from rapidly developing aviation technologies.

4/12/2020

ACI-LAC ASSEMBLY APPROVES THE PUNTA CANA DECLARATION

As part of the ACI-LAC Annual Assembly adopted the Declaration of Punta Cana. This Declaration recognizes the work of LAC airports implementing the sanitary measures that have allowed a safe restart of operations and urges the States of the region to take standardized and risk-based measures that allow a sustained recovery of the air transport industry.

Noting that aviation is a key enabler for the social and economic development of Latin American and Caribbean nations;

Noting that the COVID-19 pandemic is having a devastating economic and social impact on aviation and airports and that a considerable number of airports in our region face insolvency;

Source: ALA (ala.aero)

4/12/2020

ACI-LAC ASSEMBLY APPROVES THE PUNTA CANA DECLARATION *(cont'd)*

Noting that airports in Latin America and the Caribbean have implemented some of the world 's strictest health protocols and have adopted the ICAO guidelines to protect the health of passengers and aviation workers and help restore passenger confidence in air travel;Recognizing that passengers are demanding touchless, hygienic processes and a safe experience at airports, the ACI-LAC General Assembly:

• Urges States to recognize equivalency of measures that are simple, practical and based on medical evidence and take a risk-based approach to travel restrictions and new process requirements

• Urges States to eliminate quarantines;

• Urges States to take steps to facilitate the economic rebalancing of airport concessions and ensure the sustainability of infrastructure that is essential for the socio-economic advancement of our region;

• Encourages States to allow the introduction of new technologies throughout the entire passenger journey in order to expedite processes and make a more efficient use of infrastructure, whilst improving security and providing a more hygienic and improved travel experience;

• Commits to collaborate with regulators on the development and implementation of best practices to incorporate short and long-term requirements for health and hygiene at the region's airports, and amended passenger processes to facilitate the return to normal operation.

7/12/2020

IATA: STATES URGED TO FOLLOW GLOBAL GUIDELINES ON CREW TESTING

The International Air Transport Association (IATA) and the International Federation of Air Line Pilots' Associations (IFALPA) jointly called on governments to follow the International Civil Aviation Organization (ICAO) Council Aviation Recovery Task Force (CART) guidelines to exempt crews from COVID-19 testing that is applied to air travelers.

The CART guidelines specifically recommend that crew members should not be subject to screening or restrictions applicable to other travelers. Furthermore, according to CART. health screening methods for crew members should be as "non-invasive as possible."

Despite this guidance, an increasing number of States are applying the same public health measures for crew that are applied to the general traveling public. Such measures include providing proof of a negative COVID test prior to departure and in some cases a second negative COVID test is required upon arrival. Furthermore, several civil aviation regulators only allow crew members with a negative COVID-19 PCR test certificate to layover in their respective countries.

8/12/2020

ICAO LEADERSHIP URGES AGILITY, PARTNERSHIP, TO HASTEN THE PACE OF AVIATION INNOVATION

Addressing the ICAO Global Symposium on the Implementation of Innovation in Aviation today, ICAO's leaders highlighted the sector's high reliance on innovation to address pandemic recovery and future sustainability.

ICAO Secretary General Dr. Fang Liu underscored the extent to which innovation will be impacting security and health screening measures for governments and air travellers to enable a full air transport recovery from the COVID-19 pandemic, and to facilitate the sector's ability to withstand future pandemic events. The COVID-19 crisis environment is already accelerating developments surrounding contactless passenger screening and the digitalization of the supply chain, among other examples, and has led to airlines putting older, more emissions intensive jets out of service in favour of newer models with significantly decreased emissions.

Council President Sciacchitano ended his opening remarks stating that "By building from our sector's traditional strengths in terms of consensus and cooperation, we can innovate to face down the greatest challenge international aviation has ever faced, and emerge from it more resilient and more sustainable."

8/12/2020

ACI WORLD PUBLISHES YEAR-END COVID-19 ECONOMIC IMPACT ANALYSIS

Airports Council International (ACI) World has published its fifth COVID-19 economic impact analysis revealing the devastating effect on the airport industry and the prospects for recovery.

The Advisory Bulletin, The impact of COVID-19 on the airport business, reveals the global airport industry will record a reduction of more than 6 billion passengers by the end of 2020 compared to the pre-COVID-19 forecast for 2020, representing a decline of -64.2% of global passenger traffic.

Europe and the Middle East are predicted to be the two most impacted regions – with declines above -70% compared to the projected baseline –while Asia-Pacific has embarked on recovery earlier and faster than other regions and is forecasted to close the year 2020 with a decline of -59.2%, which was driven by large domestic markets such as China. Asia-Pacific is the only region recording a decline below -60%.

The airport industry was expected to generate about $172 billion (all figures in US Dollars) this year but the COVID-19 crisis impact on airport revenues will result in a reduction of $111.8 billion (or -65% compared to the pre-COVID-19 forecast).

8/12/2020

INEFFICIENCY IN THE EUROPEAN AIR TRAFFIC MANAGEMENT NETWORK RESULTING IN AN AVERAGE ADDITIONAL FUEL BURN OF 8.6%-11.2%

The report was produced to clarify potential environmental benefits the Single European Sky (SES) 2+ legislation could deliver on and contribute to the discussions in the European Council and Parliament. It uses a new approach directly based on fuel burn from take-off to landing, in order to better assess the potential benefit pool of fuel/CO2 that can be addressed by ATM. Previous work has mainly focused on time or distance-based indicators to measure the inefficiency of individual flight phases. The new operational excess fuel burn indicator allows a more holistic assessment and takes into account a range of factors such as wind when calculating the best route for different aircraft types.

+8.6% to 11.2% EXCESS FUEL consumption compared to the most fuel efficient flights in Europe.

9/12/2020

AVIATION INDUSTRY WELCOMES EUROPEAN COMMISSION'S SUSTAINABLE AND SMART MOBILITY STRATEGY AS IT READIES DECARBONISATION ROADMAP

Five leading European aviation associations, representing aircraft manufacturers, airlines, airports and air navigation service providers have welcomed the ambition of the European Commission's Sustainable and Smart Mobility Strategy. The Strategy is aligned with and reinforces the sector's existing commitments towards a sustainable post-crisis future for aviation – and sets the stage for concrete decarbonisation proposals.

As part of the Aviation Round Table Report, published on 16 November 2020, European aviation committed to work with policy-makers to reach Net Zero CO2 emissions by 2050. This report was formally presented to and welcomed by Commission Executive Vice President Margrethe Vestager and Commissioner for Transport Adina-Ioana Valean.

While the aviation industry is thus perfectly aligned with the objectives of the Commission's new strategy for transport, the associations warned that the sector's decreasing resources as a result of the COVID-19 crisis stand in the way – presenting a major obstacle to achieving the required goals. This will need to be factored in and fully addressed in the implementation of the strategy – both at EU and national levels. The associations stressed the need for the Commission to work closely with the aviation industry in executing

9/12/2020

AVIATION INDUSTRY WELCOMES EUROPEAN COMMISSION'S SUSTAINABLE AND SMART MOBILITY STRATEGY AS IT READIES DECARBONISATION ROADMAP *(cont'd)*

its strategy. This will ensure continued alignment between the industry's own efforts and the accompanying regulatory framework. They reiterated their call for the Commission to embrace, engage in and lead an EU Pact for Sustainable Aviation – a proposal made by the Aviation Round Table Report of which net zero CO_2 emissions by 2050 is a cornerstone.

10/12/2020

UNITED MAKES BOLD ENVIRONMENTAL COMMITMENT UNMATCHED BY ANY AIRLINE; PLEDGES 100% GREEN BY REDUCING GREENHOUSE GAS EMISSIONS 100% BY 2050

United Airlines today is taking its most ambitious step yet in leading the fight against climate change: pledging to become 100% green by reducing its greenhouse gas (GHG) emissions by 100% by 2050. United, which in 2018 became the first U.S. airline to commit to reducing its GHG emissions by 50% by 2050, will advance towards carbon neutrality by committing to a multimillion-dollar investment in revolutionary atmospheric carbon capture technology known as Direct Air Capture – rather than indirect measures like carbon-offsetting – in addition to continuing to invest in the development and use of sustainable aviation fuel (SAF). With this unprecedented announcement, United becomes the first airline in the world to announce a commitment to invest in Direct Air Capture technology.

16/12/2020

IATA UNVEILS KEY DESIGN ELEMENTS OF IATA TRAVEL PASS

The International Air Transport Association (IATA) unveiled key design elements of the IATA Travel Pass. IATA Travel Pass is a mobile app to help travelers easily and securely manage their travel in line with any government requirements for COVID-19 testing or vaccine information.

IATA emphasized these priorities with three critical design elements:

- Putting travelers in control of their personal information for top-level data security and data privacy.
- Global standards recognized by governments to ensure verified identity and test/vaccine information.
- Convenience and biosafety will be enhanced with integration into contactless travel processes.

17/12/2020

NEW MODEL UNMANNED AIRCRAFT SYSTEMS (UAS) REGULATIONS TO HELP COUNTRIES SET OUT GLOBALLY-ALIGNED CIVIL UAS OPERATIONS IN DOMESTIC AIRSPACE

ICAO issued new model regulations this month to help countries establish and refine their national guidelines for domestic Unmanned Aircraft Systems (UAS) operations.

The new model UAS guidance has been designed to provide flexibility in terms of both content and risk tolerance levels, helping to ensure consistency for regulators and operators as UAS technologies advance.

17/12/2020

NEW MODEL UNMANNED AIRCRAFT SYSTEMS (UAS) REGULATIONS TO HELP COUNTRIES SET OUT GLOBALLY-ALIGNED CIVIL UAS OPERATIONS IN DOMESTIC AIRSPACE *(cont'd)*

The ICAO Model UAS Regulations cover the essentials countries need in terms of UAS certification and safe operation, but specifically do not address sovereign local determinations concerning the penalties to be levied in response to local violations, privacy protection limits, insurance requirements, etc.

24/12/2020

NEW ICAO-LACAC AIR CARGO LIBERALIZATION AGREEMENT TO BOLSTER REGIONAL VACCINE TRANSPORT, LONG-TERM RECOVERY

As part of their regional strategies for COVID-19 response and aviation recovery, ICAO's two Regional Offices for the Americas (SAM and NACC) have contributed to the development and emergence of the Latin American Civil Aviation Commission (LACAC)'s new multilateral agreement to liberalize air cargo services in the region.

The agreement comes into effect immediately among its ten signatories, and establishes expanded traffic rights, so-called "seventh freedom" traffic rights, permitting airlines from one LACAC Member State to provide all-cargo services between two other signatory States without restrictions on routes and capacity.

The 10 states involved are Brazil, Chile, Dominican Republic, Ecuador, Guatemala, Panama, Paraguay, Peru, Uruguay and Venezuela.

18/12/2020

AVSEC2020: ICAO INAUGURATES 2021 AS YEAR OF SECURITY CULTURE

ICAO Secretary General Dr. Fang Liu ended off the fourth annual ICAO Global Aviation Security Symposium (AVSEC2020) by inaugurating 2021 as the Year of Security Culture.

In her closing remarks to last week's virtual event, which concluded on Friday and brought together over 1,500 global aviation security experts and officials, Dr. Liu noted that the over-arching goal with the Year of Security Culture initiative will be to raise security awareness in aviation operations and have the entire sector thinking and acting in a security-conscious manner.

28/12/2020

TRUMP EPA FINALIZES FIRST GREENHOUSE GAS EMISSIONS STANDARDS FOR AIRCRAFT, CODIFIES RECORD OF REDUCING THE MOST GHGS IN U.S. HISTORY

The U.S. Environmental Protection Agency (EPA) finalized emissions standards for airplanes used in commercial aviation and large business jets. This action will align U.S. standards with the international carbon dioxide (CO_2) emissions standards set by the International Civil Aviation Organization (ICAO), ensuring domestically manufactured aircraft remain competitive in the global marketplace. This final rulemaking also sets a precedent with the Trump Administration being the first to regulate greenhouse gas emissions from aircraft. Under President Trump, EPA has now finalized four regulations that will reduce greenhouse gases including the Affordable Clean Energy (ACE) rule, Safer Affordable Fuel-Efficient (SAFE) Vehicle rule, and New Source Performance Standards (NSPS) for Oil and Gas – the most in history.

Hermes participates in the ERA AGM 2020

Dr Kostas Iatrou, Director General represented Hermes in the 2020 ERA AGM webinar held on October 1st.

The meeting started with two high profile speakers: Henrik Hololei, Director-General for Mobility and Transport, European Commission and Salvatore Sciacchitano, President of the ICAO Council, who shared their thoughts on the current industry crisis and future prospects for aviation. Following this, the official members only AGM started, covering items such as approval of the association accounts, minutes of the previous meeting, the association's future strategy and business plans, and included the announcement of the latest ERA Board elections.

On 1st November 2018 the European Regions Airline Association signed with Hermes a reciprocal membership agreement. The agreement grants reciprocal membership of ERA and Hermes to each other's Association.

iPADIS and Hermes concludes MoU on cooperation

We are pleased to announce the conclusion of a Memorandum of Understanding (MoU) between International Partners for Aviation Development, Innovation and Sustainability (iPADIS) and HERMES – Transport Organisation. The MoU was signed by Dr Olumuyiwa Benard Aliu, President of the Board of iPADIS and Dr Kostas Iatrou, Director General of HERMES.

The objective of the MoU is to strengthen cooperation between iPADIS and HERMES with a view to promote the contribution of aviation to the economic and social development around the world. iPADIS and HERMES will exchange information and knowledge on topics of mutual interest.

"iPADIS serves as an interface between the aviation industry and civil society, primarily to ensure that aviation related policies and programmes at the international, regional and national levels incorporate the views and interests of users, and meet the needs and expectations of civil society. Cooperation with Hermes helps to advance this objective and I am very pleased to sign this MOU on behalf of iPADIS" said Dr Aliu.

"I am pleased to sign this MoU with iPADIS. There is already a close collaboration with two of the Board members of iPADIS, Dr Olumuyiwa Benard Aliu and Raymond Benjamin, who are Honorary Members of Hermes. This MoU will allow us to work together in key areas of activities in order to promote air transport." said Dr Iatrou.

iPADIS was established to foster effective change in the global aviation industry. The organization operates on a not-for-profit basis, is independent, and pursues no political, ideological or other special interests. It consists of people of common vision, interest, and determination to achieve a world where every community enjoys the socio-economic benefits of a safe, secure, efficient, and environmentally friendly aviation system. iPADIS is involved in think-tank, advocacy and charitable activities with main focus on aviation development, sustainability, innovation and social responsibility.

Hermes is a not for profit organisation that represents individuals who are widely perceived and acknowledged as leading personalities and professionals in the air transport sector and makes policy recommendations on emerging issues.

Hermes Director General presents Hermes recommendations at the Virtual ICAO ATRP informal meeting on Air Carrier Ownership and Control

In the last ICAO Assembly, there was a decision "requesting the Council to address the remaining issues of concern to be able to make progress towards a Convention on Foreign Investment in Airlines, which aims to liberalize air carrier ownership and control on a multilateral basis in line with the ICAO Long-term Vision for International Air Transport Liberalization" (Resolution A40-9 Appendix A section II (6) refers). The Council through its Air Transport Committee (ATC) has given this task to the Air Transport Regulation Panel (ATRP).

ATRP organised a virtual informal interactive seminar of the Panel on 18 November 2020. The primary objective of the virtual meeting was for the members of the Panel to be better informed of some of the key issues of Air Carriers' ownership and control, in preparation for the formal Panel meeting in year 2021.

Dr Kostas Iatrou, Director General of Hermes – Air Transport Organisation presented the recommendations of Hermes on ownership and control in airlines at the Session 4 – "Liberalization of Airline Ownership and Control: Addressing Social and Labour Concerns".

Air Transport Regulation Panel

Hermes Board elects Luis Felipe de Oliveira as Vice President and Treasurer of the Organisation

Luis Felipe de Oliveira, a Hermes Board Member, was elected as Vice President and Treasurer after the decision of Robert Deillon in 2021 Hermes AGM to step down from the Board.

"I am delighted that Felipe has accepted the important role of Vice President and Treasurer of Hermes. On behalf of the Board, I wish to thank Robert for his long and devoted service to Hermes as Vice President and Treasurer." said Jeff Poole, President of Hermes.

Two Hermes Board Members participated in the fourth annual ICAO Global Aviation Security Symposium (AVSEC2020)

The fourth annual ICAO Global Aviation Security Symposium (AVSEC2020) held online, organised by ICAO on Friday 18th December.

The ICAO Global Aviation Security Symposium 2020 (AVSEC2020) had a theme of "Improving Security Culture by Connecting the Dots". The Symposium highlighted the importance of raising security awareness in aviation, especially in the light of COVID-19, with experts sharing best practices and practical advice in developing a strong and effective security culture. The Symposium revealed the benefits of an effective security culture and provide tips on how to establish, change and maintain good security behaviours in the aviation community where security should be everyone's responsibility.

ICAO AVSEC2020 featured wide-ranging high-level panelists including two Hermes Board Members namely Henrik Hololei, Director-General, Mobility and Transport, European Commission; and Mr. Luis Felipe de Oliveira, Director General, Airports Council International (ACI) World.

Other panelists included Dr. Rannia Leontaridi, OBE, FRSA, Director General Civil Aviation, Department for Transport, United Kingdom; Mr. David Pekoske, Administrator, Transportation Security Administration, United States; Ms. Michèle Coninsx, Assistant Secretary-General and Executive Director, Counter-Terrorism Committee Executive Directorate (CTED), United Nations.

RECOMMENDATIONS

HERMES – AIR TRANSPORT ORGANISATION IS LAUNCHING THE THEME FOR THE 2021 RECOMMENDATIONS: **RESILIENCE AND EFFICIENCY THROUGH LEADERSHIP AND COOPERATION**

Resilience and efficiency through Leadership and Cooperation

Aviation's strength has always been derived from the inter-connectedness and interdependence of all its parts, but the industry is facing its biggest crisis…Continued collaboration, cooperation and consistency across the aviation industry will be the key to rebuilding global air services capacity and keeping passengers safe, healthy, and secure, and this sector sustainable.

Although the COVID-19 pandemic has placed the aviation industry under extraordinary stress, the call for industry collaboration and cooperation is not new. Efforts to increase cooperation are likely as old as the industry itself. Why is coordination and cooperation so important? Clearly, the industry comprises many distinct organizations, representing (among others) passengers, shippers, airlines, airports, service operators, air traffic management and government and regulatory authorities. Unless there is coordination and cooperation among these stakeholders, the industry will not function. The current situation, with an unprecedented drop in aviation traffic, only underlines the need for enhanced cooperation in the industry.

In existential crises, such as the one facing aviation due to the impact of COVID-19, it is vital to bring together individuals with varied experiences to collaborate and solve complex situations. A diversity of experience is needed to see risks and opportunities from different angles to generate new, dynamic, and flexible solutions.

But cooperation also requires joint leadership as most likely there cannot be a single leader issuing guidance or directives. Instead, the leadership challenge is concerned with influencing or transforming individual opinions and ensuring that the various parties have a common set of goals. Achieving this set of goals may not be an easy task.

As a forum of industry thought leaders, Hermes has decided to take the lead in facilitating discussion on collaboration and leadership in the aviation industry. The important short-term goal of this collaboration is to help the industry find a way out of its current crisis. A longer-term goal is to determine ways to institutionalize collaborative and leadership practices. With both the short term and longer-term goals in mind, Hermes invites interesting stakeholders to issue position papers in response to the following questions:

1. What are the shared goals of the stakeholders in the aviation industry? Does the achievement of these shared goals benefit all stakeholders in the industry? How can the industry ensure that the achievement of these shared goals does not unduly advantage some stakeholders at the expense of others?

2. Who should assume a leadership role in industry decision-making? What should be the roles of these leaders? What processes should the leaders follow to achieve cooperation and consensus among industry stakeholders? How does the industry overcome some embedded interests of some key stakeholders than may undermine the common good?

3. During the COVID pandemic, the aviation industry has experienced unprecedented actions by States as they closed borders to air travel and instituted quarantines for air travelers. Although the states may have acted with the health interests of their citizens in mind, these individual actions may have contributed to a "sub-optimal" situation for the aviation industry and the global economy. Are there cooperative arrangements that could be put in place to guide individual state actions? If so, who should lead the efforts in determining these cooperative arrangements?

52nd **AFRAA** AGA

The African Airlines Association (AFRAA) concluded its 52nd Annual General Assembly with a rallying call for airlines to take specific measures to build resilience and emerge stronger after the crisis. The Assembly further called for a multi-sectorial and pragmatic approach by governments and stakeholders to support the recovery of air transport industry and interrelated sectors such as tourism.

The AGA, which was hosted by TAAG Angola Airlines, was held in virtual format under the theme: "Redefining Air Transport for a New Era". The Assembly brought together top African airline CEO's, industry partners, leaders of international and regional air transport associations including the African union, IATA, ICAO, AFCAC, TIACA and more than 400 delegates from 76 nationalities across the globe.

Speaking as Chief Guest; His Excellency, the Transport Minister of the Republic of Angola Mr. Ricardo de Abreu said:" We are conscious of the enabling role that aviation plays in facilitating trade and growing our economies. As we collectively navigate these times, we will seek to emerge from this pandemic more resilient, organized and determined to succeed"

In a comprehensive analysis of the industry's outlook for 2021 and beyond that was presented in AFRAA's annual report it was noted that recovery of traffic in Africa is expected to start with domestic markets. Intra-African routes are projected to follow suit, while international traffic is expected to take more time to reach pre-crisis levels due to a challenging operating environment.

Mr. Abdérahmane Berthé, *AFRAA's Secretary General,* remarked "This is a pivotal moment in our history as we aim to reposition the African air transport market towards recovery and sustainability. Now more than ever, operational challenges faced by African Airlines

have to be prioritized and addressed, especially the high taxes and charges that hinder the growth and recovery of carriers on the continent. On our part as AFRAA, we tackled the crisis by resolutely pivoting our strategic and tactical resources to support recovery efforts. We have launched an interactive capacity sharing portal to provide access to market-leading services to African airlines, and developed a recovery plan revolving around 9 pillars of interest to the sector and a comprehensive strategic plan that is geared towards helping the industry meet its aspirations."

During the Assembly, key stakeholders emphasized the importance of coordinated efforts and a collaborative approach as a way to secure business continuity. An appeal was made to governments and development financial institutions to continue supporting the industry as a means to secure the continent's social and economic recovery given the sector'sstrategic contribution to national GDP.

TAAG Angola Chief Executive Officer **Mr. Rui Carreira** said: "Our strategic deliberations at this 52nd AGA have set the foundation for the recovery and successful restart of our industry. Although we foresee a slow recovery, we are currently implementing key measures that will restore passenger confidence and optimize our operations for a more affordable and successful industry."

This year's summit saw the expansion of AFRAA's fraternity with two new members including: Overland Airways Limited and Syphax Airways; bringing the association's membership to 47 African airlines. Similarly, De Havilland Canada, PRODIGY Avia Solutions Limited and South African Tourism joined the Associations' partnership programme which serves as a forum for industry-related organizations to support the development of air transport in Africa.

The 52nd AFRAA AGA re-elected Mr. Rui Carreira President of the Association for the year 2021. Mr. Desire Bantu Balazire,

Chief Executive of Congo Airways was elected Chairman of the Executive Committee. Ms. Yvonne Makolo Chief Executive of RwandAir was elected 1st Vice Chairperson of the Executive Committee while Ms Amal Mint Maouloud, CEO of Mauritania Airlines was elected 2nd Vice Chairperson for the year 2021.

2020 **ECAC**/EU Dialogue

The joint 11th edition of the ECAC/EU Dialogue with the air transport industry was held on 4th November with analyses and ideas for addressing the challenges the European aviation sector is facing in this unprecedented crisis.

Over 350 senior leaders from regulators, airlines, airports, air navigation service providers, manufacturers and industry organisations participated in this Dialogue, which was held under the auspices of the German Presidency of the European Union. Initially, the event was planned in Friedrichshafen but had to be adapted to a virtual conference. This change had no effect on the excellent contributions and lively panel discussions aimed at producing recommendations in the interests of the air transport sector.

ECAC President Ingrid Cherfils opened the conference, followed by a keynote speech by *the Director General for Mobility and Transport of the European Commission,* **Henrik Hololei**, joined by the Parliamentary State Secretary of the German Federal Ministry of Transport and Digital Infrastructure, Steffen Bilger.

The four sessions, with high-level panellists from the industry and regulators, covered topics such as the economic consequences of the pandemic, the public perception of the aviation sector, sustainability and innovation, and lastly the Single European Sky (SES) package.

With the objective of setting priorities to support the recovery of European aviation in a changed environment, the conference discussed:

- Economic and financial relief measures for the industry have been put in place in Europe and globally. The measures adopted by different States demonstrate the importance governments give to the sector, and are a recognition of its value to the economy at large. The level of this financial support is unprecedented but the prolonged crisis will have a major impact in the sector, which has very limited revenues for a long period of time, in a severely deapressed market. Additional support will be needed in the months and years to come to manage through the crisis - which will be much longer than initially anticipated - and it will need to be designed in a way that ensures a sustainable recovery of the sector.

- Consumer confidence needs to be rebuilt. Safety and security remain a priority for all actors of the sector, at a time where the primary focus is legitimately placed on the economic aspects of the crisis. All actors are committed to maintain safe and secure operations combined with

Closing session
Key takeaways for the future of aviation

Ingrid Cherfils
President of ECAC

Filip Cornelis
Director for Aviation, DG MOVE, European Commission

Johann Friedrich Colsman
Director General for Civil Aviation, BMVI, Germany

more stable and harmonised public health measures, in the interest of the travelling public.

- This crisis acts as a catalyst to accelerate action on innovation, leading to advances in technology and policies, where current challenges can be turned into opportunities. Sustainability is both one of the main challenges and opportunities that the air transport sector faces. Innovation in aircraft, engines, fuels and operations will be one part of the solution, while other initiatives, such as market-based measures, will also play a key role.

- The modernisation of air traffic management systems and the implementation of the Single European Sky package will be a further building block for, and play a key role in, mitigating the climate change impact of civil aviation. The fundamentals of making the European airspace and its management more efficient, while addressing the financing issues in the system, was emphasised.

In concluding the event, **Ingrid Cherfils**, *ECAC President*, said that European aviation is facing an, "unprecedented crisis – unprecedented in its duration, its scope and its structural impact on the sector, leading to lasting changes. Unprecedented also as it will most likely change travel behaviour resulting in new patterns for travel demand and passenger expectations. This crisis has shown the high dependence of the aviation sector on decisions taken in other domains, such as those by health ministries and immigration authorities. We need to adopt and implement innovative solutions that combine both the financial

needs of the sector and public health requirements, and this can only be achieved with a strong, clear and common vision of the air transport sector we want for our economies and by strong cooperation between all those involved in this common vision."

Filip Cornelis, *Director for Aviation, DG MOVE, European Commission,* emphasised the need to maintain support to the aviation sector, and restore passenger confidence, whilst preparing for a greener and more digital recovery: "This ECAC/EU Dialogue between regulators and industry provided great insights in the challenges for the coming months and years, and will help inform many initiatives which are in the works at EU level – whether it's the promotion of sustainability, the survival of the industry and the restoration of consumer confidence, or the ongoing negotiations on the Commission's new proposal for the Single European Sky. More than ever, we need the regulatory agenda to focus on helping the industry meet the expectations of the public for restoring connectivity in a more sustainable and smart way."

Johann Friedrich Colsman, *Director General for Civil Aviation, Federal Ministry of Transport and Digital Structure, Germany*, highlighted "the Single European Sky project and mentioned that a key factor is the modernisation of the air traffic management system. We have today further elaborated on what was discussed at the Aviation Summit under the German EU Council Presidency earlier this year. The Single European Sky is also an important part of achieving our environmental goals and making aviation more efficient and sustainable."

2020 IATA AGM

Alexandre de Juniac's Report on the Air Transport Industry at IATA's 76th AGM

Efforts to control the spread of the Coronavirus have resulted in the greatest de-connecting of people since the Second World War. Borders are effectively closed. Our freedom of movement has been severely restricted. And the impact on aviation has been catastrophic:

- International passenger travel is down 89%. Domestic by 43%.
- With just 1.8 billion people expected to travel this year, we are back at 2003 levels
- Cargo is a bright spot. But with volumes 8% below 2019 it's hardly good news.

Together we have experienced many crises. None rivals the scale of COVID-19. But all taught us resilience. Today, resilience depends on:

- Reinforcing our commitments to safety and sustainability.
- Re-opening borders, and
- Repairing shattered finances.

Absence makes the heart grow fonder

In bringing my report to its conclusion, I want to share three points of pride for aviation that have come into sharp focus with the COVID-19 crisis.

- First, the value of air cargo is front and center. At least 46,000 special cargo flights delivered1.5 million tonnes of medical equipment to fight the disease. The second chapter of this story will unfold when the biggest airlift in history delivers COVID-19 vaccines.
- Second, we have unequivocal proof that a world without the freedom to fly is a sadder and poorer place. Nearly 40,000 repatriation flights brought over 5.4 million people back home. But still, too many family reunions, weddings, funerals, vacations, educations and business development opportunities were put on hold or completely missed.
- Third, we know that real beats virtual. We have all struggled to master Zoom, Teams and other virtual meeting technologies. Each experience, even this AGM, reminds us that there is a significant qualitative difference between real and virtual. Real is better. And aviation makes real happen.

These examples illustrate why our agenda for recovery is so critical.

- We will never compromise on safety or sustainability.
- We must safely pry open borders with testing, and without quarantine.
- And we need the financial support of governments to survive until the business revives.

The months ahead will challenge us as never before. But resilience is in aviation's DNA. We will re-connect the world. Our mission is unchanged. We are the business of freedom.

ICAO President underscores importance of solidarity, innovation, and sustainability to sectoral recovery strategies

Speaking to the leadership of the global airline and European aviation sector, ICAO Council President Salvatore Sciacchitano stressed the importance of placing solidarity, innovation, and sustainability at the heart of States' and operators' recovery plans.

The President concluded his remarks by welcoming the

Alexandre de Juniac

Director General and CEO, IATA

participation of airlines, through IATA, in ICAO's response and recovery efforts and outcomes, regions and stakeholders who cooperate through it to benefit from one another's' insights and best practices.

IATA AGM Calls for Reopening Borders with Testing and Without Quarantine

The International Air Transport Association (IATA) 76th Annual General Meeting (AGM) unanimously resolved to urgently call on governments to re-open borders to travel.IATA is proposing systematic testing of international travelers which would permit the lifting of border restrictions and provide an alternative to current quarantine rules.

IATA AGM Calls for Governments to Support Safe & Sustainable Industry Restart

The International Air Transport Association (IATA) 76th Annual General Meeting (AGM) unanimously approved a resolution re-confirming the airlines' unwavering commitment to safely and sustainably re-connect the planet.
The resolution called on governments to:
- Ensure the industry's viability with continued financial and regulatory support,
- Aid the industry in reaching its 2050 goal of cutting emissions

to half of 2005 levels while exploring pathways to net zero carbon emissions through economic stimulus investments in commercializing Sustainable Aviation Fuel (SAF),
- Work with airlines to ensure safety standards and critical skills are maintained both during the crisis and in the subsequent re-start and scale-up of operations.

Leadership Changes at IATA

- Robin Hayes, CEO of JetBlue is now the Chair of the IATA Board of Governors (BoG), succeeding Carsten Spohr, Chair IATA BoG (2019-2020) and CEO of Lufthansa. Hayes will serve a term commencing immediately and ending at the conclusion of the Association's 78th Annual General Meeting to be held in 2022. Hayes will serve an extended term as Chair covering two AGMs due the disruption to governance cycles necessitated by the COVID-19 crisis.
- Rickard Gustafson, CEO of SAS Group will serve as Chairman of the BoG from the conclusion of the 78th IATA AGM in 2022 until the conclusion of the 79th AGM in 2023, following Hayes' term.
- Willie Walsh, former CEO of International Airlines Group (IAG) will become IATA's 8th Director General from 1 April 2021. He will succeed Alexandre de Juniac, who has led IATA since 2016 and who will step down from IATA at the end of March 2021.

AVSEC2020

AVSEC2020: ICAO inaugurates 2021 as Year of Security Culture

Montréal, 21 December 2020

ICAO Secretary General Dr. Fang Liu ended off the fourth annual ICAO Global Aviation Security Symposium (AVSEC2020) by inaugurating 2021 as the Year of Security Culture.

In her closing remarks to last week's virtual event, which concluded on Friday and brought together over 1,500 global aviation security experts and officials, Dr. Liu noted that the over-arching goal with the Year of Security Culture initiative will be to raise security awareness in aviation operations and have the entire sector thinking and acting in a security-conscious manner.

"Special and multi-agency events will be conducted, and supplemented by a series of global and regional activities focused on innovations in cybersecurity, Unmanned Aircraft Systems, air cargo, and pandemic recovery," she emphasized. "From industry leaders to frontline workers, and from taxi drivers to those working in airport retail outlets, everyone should be engaged as security is everyone's responsibility."
In addition to being the Year of Security Culture, Dr. Liu reminded her audience that 2021 would also be the 20th commemoration of the 9/11 attacks on the United States, and the dawn of the modern aviation security era.

"Placing due focus on 9/11, and what it meant to aviation, will help us to raise security awareness in a holistic way and build on our strengths as we confront the new normal," she concluded.
In acknowledging the challenging conditions 2020 and the

pandemic have presented, Dr. Liu used the Symposium to highlight the extensive actions and resources which ICAO has realized, and spoke to both the challenges and opportunities that COVID-19 was posing to aviation stakeholders.

In addition, the sheer pace of innovation, in terms of hardware and machine learning and other advances, were recognized by the ICAO Secretary General as "accelerating to such an extent that no one can rest idly in their assumptions of how aviation security may look or function in even ten years' time."
Dr. Liu concluded by encouraging all to "take concrete actions and to set ambitious objectives to support the implementation of an effective security culture in aviation".

ICAO AVSEC2020 featured wide-ranging high-level panelists including Dr. Rannia Leontaridi, OBE, FRSA, Director General Civil Aviation, Department for Transport, United Kingdom; Mr. David Pekoske, Administrator, Transportation Security Administration, United States; Ms. Michèle Coninsx, Assistant Secretary-General and Executive Director, Counter-Terrorism Committee Executive Directorate (CTED), United Nations; Mr. Henrik Hololei, Director-General, Mobility and Transport, European Commission; and Mr. Luis Felipe de Oliveira, Director General, Airports Council International (ACI) World.

**Italian Hipster smiles
at Athens International Airport**
Ceramic, 2019 A.D.

THE ΛUTHENTIC SMILES

ATHENS
INTERNATIONAL AIRPORT
ELEFTHERIOS VENIZELOS
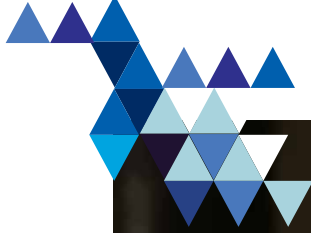
ABDUL WAHAB TEFFAHA

Secretary General
AACO

What are the shared goals of the stakeholders in the aviation industry?

The goals, at this point in time, for the industry and its stakeholders in my opinion, are divided into two big sections: the first is certainly how to deal with the current crisis, the pandemic, and the second one is how the industry needs to be in the recovery phase. For the short term, the biggest problem we are facing today is not only the pandemic by itself, but how many governments are looking at aviation as a culprit in the spread of the pandemic. The way those governments have dealt with the pandemic shows fear of blame and not

leadership. In my view, the utmost objective for the short term should be to convince governments, first that the aviation industry is not a spreader of the virus, of course, while adhering to all biosafety and protective measures that are in use today, and second that closing borders is not going to mitigate the exposure to the virus, and this has already been proven in many instances as there are countries that are closed but still the virus is spreading like wildfire. Governments should learn from those facts that it is not traveling that is spreading the virus but lack of responsible behavior from many individuals in not doing the right things. Numbers that underline this fact are very clear: 97.1% of the infections are locally generated, 2.9% were incoming travelers who had the virus before even traveling, and only 0.0000004% of the infections happened during the air transport phases including even the time when the virus was not identified, and no protective measures were taken neither by the crews nor by the travelers. Hence, we need to convince governments as an industry, as stakeholders of the industry that the right way to deal with this crisis is not by closing borders, is not by quarantine but it is by implementing smart measures that will not actually stop travel but that will make travel from the biosafety angle a safer way of transport. This should be the primary objective.

The question I ask myself is how the industry and the stakeholders will talk or be able to convince governments, when many of them ignored the guidelines of ICAO, WHO and IATA, even after those guidelines were welcomed and sought after by those same governments. Look at what is happening today with the UK after the discovery of the new strain: governments resorted back to their comfort zone of employing unilateral measures, no harmony, no discussions even no scientifically driven measures. Going back to the basics, it needs to be stressed that those measures taken today have proven to be not good enough to mitigate the spread. So, the answer is not more closure, the answer is openness with intelligence, that is "smart openness" rather than just fall back on isolation and for some politicians to try to convince their constituencies that they are doing the right thing, driven by the fear of blame rather than driven by leadership. This is where many governments have failed miserably in dealing with this pandemic. Now we can see the light at the end of the tunnel, the

vaccines are there, and we know that we have started with the help of the vaccines the way out of the tunnel. But the question is going to be: "how many airlines, restaurants, hotels, stakeholders, people are going to be left out in the tunnel?" Because by the time we exit the tunnel we will be a smaller industry in terms of connectivity, which will have serious repercussions on the recovery of the economy. We need to reach that light at the end of the tunnel with the maximum possible strength rather than what they are seeing today which is causing the damage for the industry for no good reason.

On the second shared goal, we need leadership from the industry and from other stakeholders. More particularly ICAO in conjunction with WHO, and in relation with national governments, should make visible the information of the biosafety of the individuals who are going to travel together. First, we need to convince travelers that the aviation system is safe. In order to do that there is several protective measures, the vaccine and other measures that need to be taken and implemented. One of them is of course the PCR test, especially the rapid ones. But, in order for the governments to identify that this individual/traveler has all the prerequisites, and is not a transmitter of the virus, they need a tool. IATA has launched a great initiative, which is the Travel Pass. This Pass harnesses technology and makes it visible to the concerned parties. That helps in restoring trust in the system and helps the industry recover faster by bringing all the travelers' informa-

tion, including the vaccine certificate provided of course that the Pass meets the adoption by governments and other stakeholders to the concerned parties. Technology has provided all peoples of the world with alternatives for physical interaction. Now it can provide more tools for the traveling experience. If the right strings are pulled, if the governments approve using technology for a better travel experience, irrespective of whether it is called IATA pass or ICAO or individual airlines' passes, and with WHO adopting the health certificate with this "electronic travel pass" where all the required health information are on the app which proves that the traveler meets all the prerequisites for safe travel, traveling will become easier. That will add value to the recovery. We can even push the envelope a bit further and we can imagine this app with biometrics for the use of governments' agencies, immigration, security and so on, all the points that cause burden and delays to the traveler. We are used to having crowding at the immigration offices, at the customs offices, at the security points. All those points can take advantage of pushing the use of technology further. Technology can provide a smoother way of handling the passenger to ensure not only that people are bio-safe, but they are also secure, that they have their valid documents, and the customs clearance can be done in an easier way. And if governments approve that pass, imagine what will happen to the traveler experience for all the travelers of the world; that will help not only on a short term for recovery, but also in the long term to create that utopian situation we have always strived to achieve IATA's fast travel initiative. That can be done. Technology is there and it has proven it is reliable and it can do that with acceptance by the governments of all of those components. One can travel today with the boarding pass on the phone, airline security and immigration accept that.

Why not accepting that my visas are on the phone, my passport is on my phone, or that my ID on the phone.

To summarize, short terms goals are to convince governments that quarantine and closing borders are not the right approaches. Opening borders and adherence to biosafety measures (PCRs, rapid tests) are the right approaches. These measures should be implemented before departure or after arrival but without quarantine. This is the short-term objective that we need to do today. The medium-term goal is to make sure that technology is harnessed with the acceptance by governments to recognize that travelers are bio-safe, secure and have all the prerequisites for a smooth travel experience.

So, are there any risks in terms of competition dynamics? How will level playing field evolve in the future? Could competition possibly undermine any future collaboration among the various stakeholders?

I believe that, at the moment, the whole industry is in a survival mode, so no one is looking at who is taking what from his government. I believe that this is the role of governments. They need to step in and provide safety nets for the airlines in what they represent, that is a major contribution to the economic resilience. Therefore, if US and EU airlines are receiving support from their governments, that's great, because I am calling upon the Arab governments to do the same. Governments are required to step in during times of crises and provide safety nets in order for the economy to recover faster. Without that safety net imagine what would be the case for jobs and how the recovery will happen. What the recovery will be like when we get out of this situation if the main foundations of the players, stakeholders, airlines, hotels, restau-

rants and so on have collapsed during the crisis. So, I would not think that what is happening with the support is bad. US airlines are receiving something like 30% + of their perceived losses. Airlines in Europe received more than 35% of their perceived losses, while airlines in the Arab region received only 11% of their perceived losses. I am encouraging governments in the Arab world to support the airlines in similar magnitudes. Otherwise, it will be very difficult for the airlines to go back to their normal pre-crisis operations very quickly. Because of the competitive nature of the business, there have always been voices against subsidies claiming, "I cannot compete against airlines that get subsidies". These claims will be heard again when the industry gets back to normal, but in the current situation, any cent spent on airlines and any other stakeholders such as airports and so on in support of the resilience of the aviation industry and its satellite businesses is wanted and needed.

Who should assume a leadership role in industry decision-making? What is expected of leaders these days but also in the medium and longer term?

IATA and ICAO should take the lead jointly with WHO in order to provide the needed power to convince governments that there is a better way of dealing with the problem. I am not talking about appealing to governments but about a joint strategy built upon the main requisites of the stakeholders for a quick recovery. IATA representing the airlines which are the connectors and the backbone for the other related industries; ICAO representing the infrastructure and the entry points; the governments in terms of oversight over the airlines, airports, airspace and so on; and the WHO for being the party representing the governments in relation to the required health

measures and measures in general to deal with the pandemic. So, the leadership should be a combined leadership that is required not only to produce guidelines which are of course important especially the harmonized guidelines provided by ICAO in conjunction with IATA and WHO - but also to reach out to governments individually and to talk to them and present action plans for dealing with access to their countries and dealing with the measures required by most governments in order to ensure travel with the maximum biosafety. I will present an example of what we have done jointly with the Arab Civil Aviation Organization, IATA and ICAO regional offices, and the Arab Tourism Organization, to give an idea of how this can be implemented: we have taken ICAO CART guidelines and discussed them in a joint Forum with the four organizations and developed an action plan which was taken to the Arab Council of Transport Ministers for approval and it was approved. We also went to the Arab League which is the custodian of all the joint Arab efforts, and it was approved. The implementation tool for these measures will be through a joint meeting that will bring together the executive offices of the three ministerial councils that made the harmonization of these measures, the CART measures basically, possible for implementation. More specifically, the meeting will bring together the Arab ministers of Health, Arab Ministers of Transport and Arab Ministers of Tourism in order to adopt these measures and then to carry on with the individual governments for implementation. This is a model that can be done elsewhere in the world.

Can this collaboration on COVID-19 crisis serve as a model of collaboration between the different stakeholders for any future crises aviation will face?

Absolutely. This does not mean that collaboration does not exist today. There is a great deal of collaboration between IATA and ICAO on the environmental front and between A4E, EUROCONTROL, and the EU on infrastructure development and air traffic management flows. Those examples of collaboration have led to better results not only for airlines and for airports, but also to the sustainable development in all the countries of the world. So that model of collaboration is already here, what it needs to have is more passion in doing things, more decisiveness to go beyond the conventional. Unfortunately, some members of governmental organizations raise too many hurdles by invoking the principle of sovereignty. I do understand it, but most of the times it comes into play to stop things from happening rather than to make them happen. The sovereignty concept should be used to take from best practices and best work that is done globally and implement them nationally. But what is happening most of the time is that sovereignty is like a comfort zone where countries or governments step back and say, "we will not do what is recommended because we are sovereign!". They invoke sovereignty every time they want to stop something from happening. This is where going beyond the conventional is important. And to use an example: Why is it that the EU was the very successful in dealing with this crisis in comparison with other parts of the world? Some people may say China, but Chinese dynamics are totally different than the western dynamics in relation to how they implement measures internally, how they enforce adherence. That cannot happen in the Western world. But if we compare two western powers, the EU with the US, the EU is much more successful in handling this crisis and this is obvious by the number of infections. The secret in that success is that the EU transcends political boundaries in Europe and has the power to be listened to by national governments in that region.

ICAO in its meeting back in September discussed main collaboration and innovation and now they are pushing for a closer collaboration with the industry, to establish a link between ICAO which represents the governments with the industry, that is IATA, ACI and similar organisations to work on innovation. How do you see a closer collaboration between governments, one part of aviation chain with the industry, that is all stakeholders? How important is such a collaboration in order for the industry to be successful and efficient?

I see such collaboration already happening today and it has been happening for some time now. ICAO as an inclusive organization, reaching out to other stakeholders, was never a problem. ICAO should be commended for being open to other stakeholders' opinions, ideas, and inputs. Salvatore Sciacchitano, ICAO Council President, has come from an "experiment" of a very deep collaboration within the EU, so Salvatore has come to ICAO with a legacy of the importance of collaboration, so he understands very well how important it is to go beyond the conventional to deepen that spirit of cooperation between stakeholders.

But there is a caveat on deliverables of cooperation. Cooperation is great if it leads to action on the ground. To give an example: CART I and CART II were excellent initiatives that led to harmonious measures that can be implemented by governments. Unfortunately, it stopped there, and I am not blaming ICAO for that. Guidelines are guidelines but aviation people and governments are not the drivers. If you do something good in the time of crisis then it serves as a model for what can be done

in normal times because that will add value to whatever you are doing. If you are succeeding in a crisis then you will succeed with high marks in a normal situation. ICAO succeeded in bringing together different parties to issue the guidelines. But these guidelines, despite the best efforts of ICAO which created dashboards to show who is implementing and who is not - have not been as successful as expected. I believe that many of the individual stakeholders in ICAO did not play their role in order to make these guidelines implemented globally. It is not ICAO nor IATA to blame, what needs to be done is to actually change the attitude towards what is called "guidelines" from being only "guidelines", that is recommendations that we can forget about and do whatever we want, to something more concrete: to understand that guidelines need to be actually implemented. Good things are measured by what happens on the ground, and not by good intentions. Seeing what has happened this last year with the UK has made me believe even more that no matter what great guidelines one does, no matter what great recommendations one does, no matter how deep the collaboration is, the test is what is implemented on the ground at the end. Therefore, on the theoretical academic level, what we have done collaboratively is great, but on the ground, airlines and stakeholders are still suffering and many governments are doing what they want to do, individually, that is making life even more difficult for aviation. I hope the lesson to be learnt from this crisis is that we can collaborate and talk in principle as much as we want but the achievement is not there. The actual achievement is how much of that is going to transpire to the actual stakeholders on the ground. And this is what matters: what our people are going to feel that what we have done together has made a difference, a positive difference.

RECOVERY OF AIR CONNECTIVITY, SOME CHALLENGES AND OPPORTUNITIES

by *JUAN CARLOS SALAZAR*[1]
DG and *CEO of Aeronautica Civil of Colombia*

AERONÁUTICA CIVIL
UNIDAD ADMINISTRATIVA ESPECIAL

Colombia is a a pioneer in civil aviation. In 2020 we celebrated 101 years of commercial aviation, but as in every country in the world, we also confronted unprecedented challenges for our civil aviation system. Colombian airspace was closed for commercial services between April and August of 2020 due to the COVID-19 pandemic. Since the 1st of September, the Colombian government allowed the reopening of commercial flights and the country has seen a quick recovery, thanks to the implementation of strict health protocols and an 'essential air connectivity plan'.

Colombia went from having 25,000 passengers in August (mostly in humanitarian flights) to 353,000 passengers in September, by progressively opening 16 main airports on September 1st (phase 1 of the plan); then opening 30 additional airports within three weeks (phase 2 of the plan) and allowing international air services to selected destinations.

Within 3 weeks the country reestablished air connectivity in almost 90% of its domestic destinations and 50% of its international air routes compared with pre-Covid times.

Air connectivity is essential for Colombia since it is the way to integrate our vast territory. It is the only mode of transportation with the real potential to connect the most distant places in our country. On the other hand, with three mountain ranges that go from north to south, the main cities are closer than ever, since 14-hour trips by land have become an hour commute by plane; and of course international connectivity is also essential for a region (Latin America) that is not connected by roads or railways.

Having reestablished essential air connectivity, the focus has been to introduce additional frequencies and reignite competition by allowing various airlines to offer its services

---

1 Juan Carlos Salazar is DG and CEO of Aeronautica Civil of Colombia, a complex civil aviation organization with over 3100 employees. It is the civil aviation authority, owns the main 72 public airports, provide air navigation services, conducts accident investigations and has a university specialized in training specialized personnel such as ATC, ATSEP and inspectors in Colombia. He is currently candidate for the position of Secretary General of ICAO.

Phase 2 - Domestic

Phase 3 - Domestic
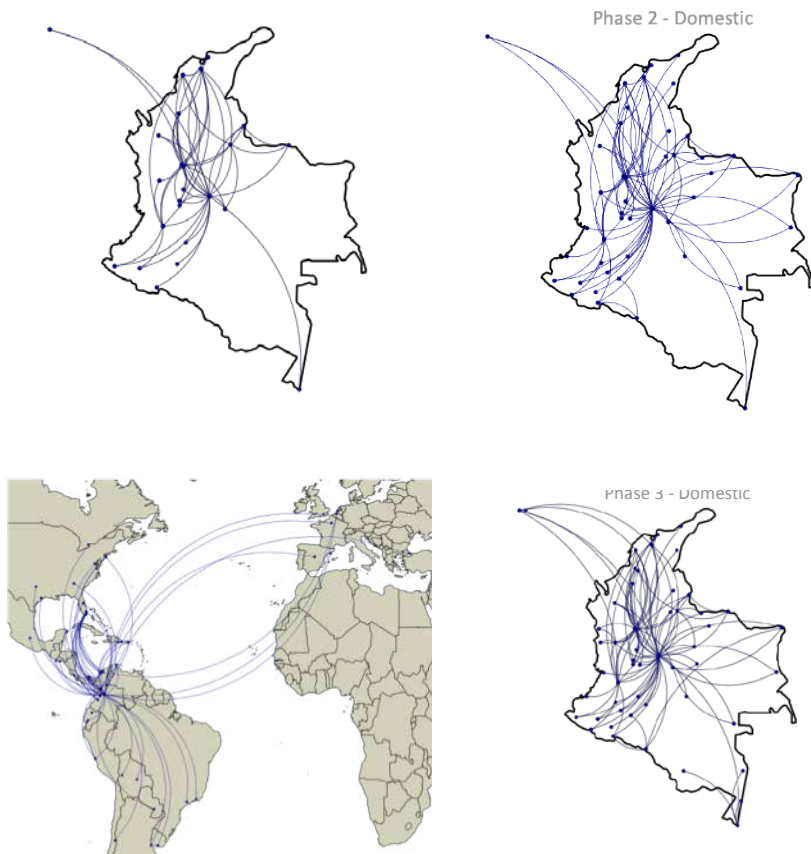
in specific routes. The numbers rapidly increased to 840,000 passengers in October, 1.27 million passengers in November (Phase 3 of the plan) and 1.80 million passenger in December (see below figure), reflecting the travelling public's high level of confidence, and that of health and local authorities that have supported the sustainment of air services.

The aviation sector in Colombia did not lose focus on its 2030-Vision, nor its 2030 Strategic Civil Aviation Plan, which was adopted as part of President Ivan Duque's "National Development Plan 2018 — 2022". The vision consists of preparing to mobilize over 100 million passengers and 1.5 million tons of cargo by the year 2030 in a competitive, connected, safe, sustainable and clearer institutional framework, supported

by renewed infrastructure, a robust industry and human talent of excellence. The vision is comprised of eight strategic objectives (as shown in the below figure) that have allowed Aerocivil to maintain its focus and achieve substantive progress, even in the face of the deepest crisis to ever affect international civil aviation since 1944.

We are convinced that the speed of recovery of Colombia's air transport system depends precisely on maintaining focus on that 2030 vision. We recognize that we must "fine tune" the action plan, but without changing the objectives that are more valid today than before the crisis. As Sir Winston Churchill said "[W]e can't let a good crisis go to waste", which means that in Colombia, we continue to bet on mobilizing 100 million passengers and doubling air cargo transport by 2030. For example, we took Covid-19 restriction of commercial air transport as an opportunity to accelerate the completion of important infrastructure projects (such as new terminals in Pasto, Leticia and Armenia regions), the complete reconstruction of one of the runways at Bogota's Eldorado Airport and the intervention of 8 other runways at our main commercial airports, to better prepare Colombia's airport infrastructure for the challenges of the quick recovery of commercial air connectivity.

Fuente. Aerocivil. Cifras Noviembre y diciembre de 2020 estimadas

We have also used the current crisis to advance the objective of making our aviation sector more competitive. Colombia has used various tools available and within its reach to alleviate the financial situations of private actors within the system, for example by modifying the dates of paying tax contributions. Also, VAT was reduced from 19% to 5% for aircraft fuel and for the sale of air transport services, and the tariff of 96 items related to aircraft was set to 0%, making the tax relationship with the State more flexible.

Additionally, tax benefits were incorporated into foreign mega-investments in the aviation sector, which seeks to encourage foreign investment in the reactivation stage. It should be remembered that Colombia is one of the few countries that allows 100% for-

eign ownership of national airlines. As for airport services, we excepted the charge for aircraft parking and leases at airports operated by Aerocivil. Some airport concessionaires joined this policy, in addition to extending the periods for the payment of certain collections. See figure below for some of the measures adopted by Aerocivil to alleviate the situation of our aviation sector.

We have heard in forums and meetings the following concern: If the pandemic is a public health problem, how does aviation contribute to solving it? And the answer lies in harmonizing the health-related protocols that include requirements for admission, tests and quarantine, that are implemented by different states. This is an imperative to restore confidence in international air travel.

Another question is: If a global economic crisis destroys demand, what options do we have? This allows us to identify different variables, deconstructing them into their effects in order to implement and manage strategies, like the following:

—The confidence of passenger and public health authorities must be strengthened, aviation must then work hand in hand with health authorities, to be able to operate in an environment of endemic COVID-19, where harmonizing health-security protocols and international admittance requirements is key.

—Air transport users feel uncertain, disinformed and concerned about the risk of infection. This leads to a reduced incentive to use air transport. We must work to change this perception through a successful communication strategy, working together with other sectors that are part of the civil aviation value chain.

—Some actors in the sector will be disproportionately financially affected and the economic impact will be transferred to the supply chain, by airlines, schools, simulator centers, MROs, training centers or parts manufacturers and to certain sectors that drive or promote demand for aviation. It is necessary to utilize collaborative leadership to provide support to all actors in the productive chain.

—A digital world will prevail, generating cyber-dependency and the use of new technological alternatives. We must harness all that potential to modernize the way civil aviation connects with users and delivers its services.

—Changes of ideals, opinions or tendencies will generate increasingly different post-COVID-19 paradigms. The civil aviation industry should 'read' those signals and extend its reach to external actors, for the benefit of air transport.

These variables generate trends that present challenges and opportunities. The international aviation community should work to boost demand, adapt services and modify regulations where appropriate, taking care of latent risks such as those that would come from the resurgence of a new pandemic or if the current pandemic persists or becomes endemic. One of the latent challenges that we should be aware of and work to avoid is the possible reduction of the budget allocated to civil aviation authorities, as a consequence of the fiscal crisis many governments will face, that may put at risk the safe and secure recovery of international civil aviation.

STATISTICS

SEP 2020: Air Passenger Market Analysis
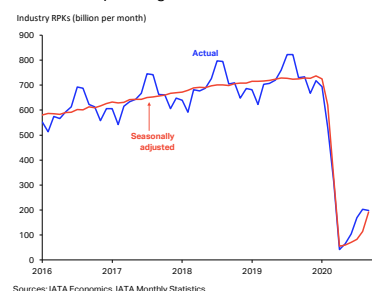
Chart 1 – Air passenger volumes

Industry RPKs (billion per month)

Sources: IATA Economics, IATA Monthly Statistics

Chart 2 – Domestic passenger volumes (seasonally adjusted data, selected markets)

Seasonally adjusted domestic RPKs (indexed to equal 100 in Jan 2019)

China Japan Russia USA

Source: IATA Economics analysis based on data provided under license by FlightRadar 24. All rights reserved
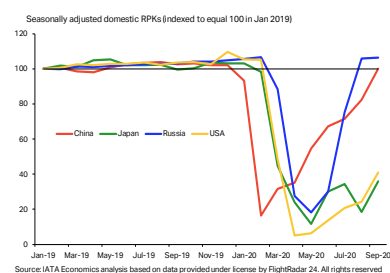
Chart 3 – New COVID cases by group of economies

New COVID19 cases per day, 7-day moving average

Emerging economies excl. China

Developed economies excl. US

US

China

Source: ECDC
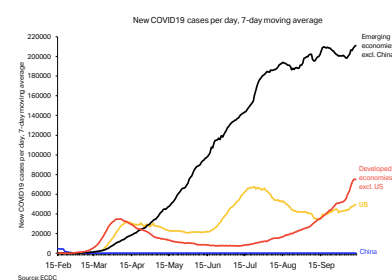
Chart 4: Economic conditions (monthly data from composite PMIs, selected markets)

50=no change, seasonally adjusted

Emerging Markets Developed Markets World Eurozone China US

Source: Markit

Chart 5 – Passenger load factors by region

● Sep 2020 ● Sep 2019

All-time Sep low* All-time Sep high*

	Sep 2020	Sep 2019
Industry	60.1%	81.9%
L. America	70.6%	81.9%
Asia Pacific	69.2%	80.2%
Europe	58.6%	86.6%
N. America	52.5%	82.7%
Africa	37.8%	72.5%
Middle East	36.5%	75.0%

Passenger load factors (% of available seat kms, actual)

Sources: IATA Economics, IATA Monthly Statistics   *Data from 1990 onwards

Chart 6 – International RPK growth, yearly (airline region of registration basis)

■ Sep 2020 ■ Aug 2020

	Sep 2020	Aug 2020
Industry	-88.8%	-88.5%
Europe	-82.5%	-80.5%
Africa	-88.5%	-88.7%
Middle East	-90.2%	-92.3%
N. America	-91.3%	-92.0%
L. America	-92.2%	-93.4%
Asia Pacific	-95.8%	-96.2%

International revenue passenger kilometres (% year-on-year)

Sources: IATA Economics, IATA Monthly Statistics

Chart 7 – Domestic RPK growth by market

■ Sep 2020 ■ Aug 2020

	Sep 2020	Aug 2020
Industry	-43.3%	-50.7%
Domestic Russia	2.7%	3.8%
Domestic China	-2.8%	-18.8%
Domestic Brazil	-55.3%	-67.0%
Domestic Japan	-59.3%	-68.8%
Domestic USA	-65.0%	-69.4%
Dom. Australia	-88.7%	-88.8%

Domestic revenue passenger kilometres (% year-on-year)

Sources: IATA Economics, IATA Monthly Statistics
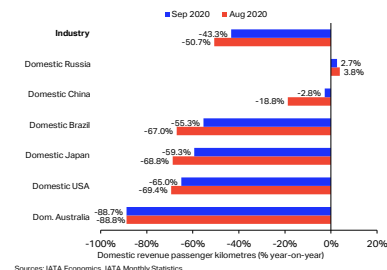
Chart 8 – COVID cases vs. domestic flights in Australia

Weekly flights in Australia, yoy   Weekly sum new cases per 100'000 residents

New COVID cases Flights

Source: IATA Economics analysis based on data provided under license by FlightRadar24. All rights reserved. ECDC
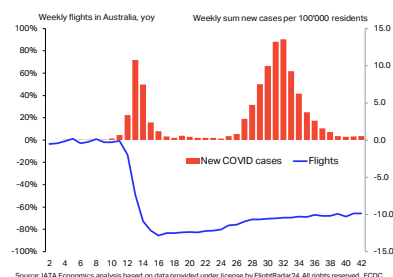
Air passenger market detail - September 2020

	World share [1]	September 2020 (% year-on-year) RPK	ASK	PLF (%-pt)[2]	PLF (level)[3]	% year-to-date RPK	ASK	PLF (%-pt)[2]	PLF (level)[3]
TOTAL MARKET	100.0%	-72.8%	-63.0%	-21.8%	60.1%	-64.7%	-56.2%	-16.1%	66.7%
Africa	2.1%	-85.6%	-72.4%	-34.7%	37.8%	-68.5%	-61.5%	-13.1%	58.9%
Asia Pacific	34.6%	-63.5%	-57.7%	-11.0%	69.2%	-61.9%	-54.1%	-13.9%	68.1%
Europe	26.8%	-75.8%	-64.3%	-27.9%	58.6%	-67.5%	-60.8%	-14.7%	70.8%
Latin America	5.1%	-76.2%	-72.4%	-11.3%	70.6%	-62.3%	-58.7%	-7.1%	75.6%
Middle East	9.1%	-88.9%	-77.2%	-38.5%	36.5%	-68.7%	-61.9%	-13.7%	63.0%
North America	22.3%	-74.7%	-60.0%	-30.3%	52.5%	-64.2%	-50.0%	-24.1%	61.0%
International	63.8%	-88.8%	-78.9%	-38.2%	43.5%	-72.3%	-65.9%	-15.3%	67.0%
Africa	1.8%	-88.5%	-74.7%	-39.4%	32.6%	-69.6%	-62.2%	-14.0%	57.6%
Asia Pacific	19.1%	-95.8%	-89.6%	-46.8%	31.7%	-75.6%	-69.8%	-15.7%	65.3%
Europe	24.0%	-82.5%	-70.7%	-35.1%	51.8%	-71.0%	-64.8%	-15.3%	70.6%
Latin America	2.7%	-92.2%	-87.9%	-29.3%	53.3%	-69.1%	-65.8%	-8.0%	75.1%
Middle East	8.7%	-90.2%	-78.5%	-40.9%	34.4%	-69.2%	-62.4%	-13.9%	62.8%
North America	7.5%	-91.3%	-78.3%	-49.8%	33.4%	-73.1%	-65.1%	-19.3%	65.1%
Domestic	36.2%	-43.3%	-33.3%	-12.4%	69.9%	-51.2%	-38.4%	-17.4%	66.4%
Dom. Australia[4]	0.8%	-88.7%	-82.8%	-28.3%	54.1%	-67.1%	-61.8%	-11.0%	68.9%
Domestic Brazil[4]	1.1%	-55.3%	-54.7%	-1.1%	80.7%	-53.2%	-51.5%	-3.0%	79.4%
Dom. China P.R.[4]	9.8%	-2.8%	2.3%	-4.2%	79.4%	-43.8%	-32.1%	-14.6%	72.0%
Domestic Japan[4]	1.1%	-59.3%	-45.6%	-19.5%	58.1%	-56.3%	-34.1%	-24.6%	48.7%
Dom. Russian Fed.[4]	1.5%	2.7%	6.8%	-3.3%	82.4%	-26.1%	-14.0%	-11.7%	72.1%
Domestic US[4]	14.0%	-65.0%	-49.3%	-25.6%	57.0%	-59.1%	-41.2%	-26.1%	59.5%

[1] % of industry RPKs in 2019   [2] Year-on-year change in load factor   [3] Load factor level

[4] Note: the seven domestic passenger markets for which broken-down data are available account for 30% of global total RPKs and approximately 83% of total domestic RPKs

Note: The total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic.

OCT 2020:
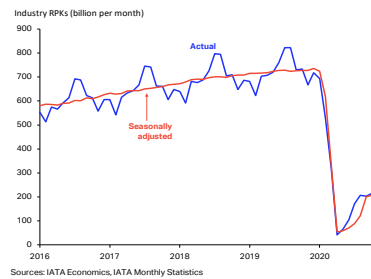# Air Passenger Market Analysis

Chart 1 – Air passenger volumes

Industry RPKs (billion per month)

Sources: IATA Economics, IATA Monthly Statistics

Chart 2 – New COVID cases by group of economies

New COVID19 cases per day, 7-day moving average

Source: ECDC
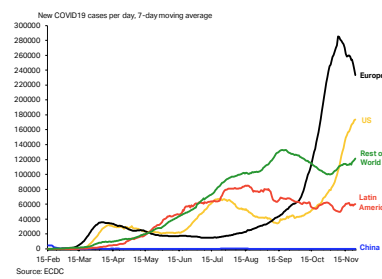
Chart 3 – Stringency of government control measures

Government stringency index (containment and closure)

Source: Oxford COVID-19 Government Response Tracker
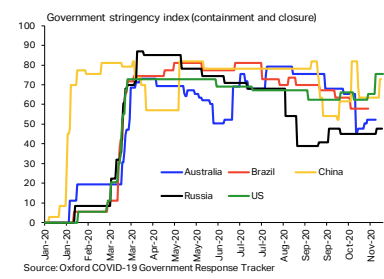
Chart 4: Business confidence (composite PMI) and consumer confidence

Indexed, Jan 2019 = 100

Source: IATA Economics using data from Markit and Thomson Reuters Datastream

Chart 5 – Passenger load factors by region

Passenger load factors (% of available seat kms, actual)

Sources: IATA Economics, IATA Monthly Statistics   *Data from 1990 onwards

Chart 6 – International RPK growth, yearly (airline region of registration basis)

International revenue passenger kilometres (% year-on-year)

Sources: IATA Economics, IATA Monthly Statistics

Chart 7 – International RPKs by route (segment-based)

International RPK growth by routes (Oct 2020, % year-on-year)

Share of total global RPKs (Year ended Oct 2020)

Sources: IATA Economics, IATA Monthly Statistics by Route

Chart 8 – Domestic RPK growth by market

Domestic revenue passenger kilometres (% year-on-year)

Sources: IATA Economics, IATA Monthly Statistics

Air passenger market detail - October 2020

	World share[1]	October 2020 (% year-on-year)				% year-to-date			
		RPK	ASK	PLF (%-pt)[2]	PLF (level)[3]	RPK	ASK	PLF (%-pt)[2]	PLF (level)[3]
TOTAL MARKET	**100.0%**	**-70.6%**	**-59.9%**	**-21.8%**	**60.2%**	**-65.1%**	**-56.4%**	**-16.7%**	**66.1%**
Africa	2.1%	-76.3%	-65.6%	-21.8%	48.2%	-69.0%	-62.2%	-12.9%	58.9%
Asia Pacific	34.6%	-61.6%	-54.5%	-12.7%	68.7%	-61.8%	-54.1%	-13.8%	68.1%
Europe	26.8%	-77.6%	-65.1%	-30.7%	55.2%	-68.2%	-60.8%	-16.0%	69.5%
Latin America	5.1%	-68.0%	-63.9%	-9.4%	72.1%	-62.8%	-59.2%	-7.3%	75.3%
Middle East	9.1%	-85.5%	-72.4%	-34.7%	38.7%	-70.0%	-62.3%	-15.6%	60.7%
North America	22.3%	-70.1%	-55.1%	-27.9%	55.8%	-64.7%	-50.5%	-24.4%	60.6%
International	**63.8%**	**-87.8%**	**-76.9%**	**-38.3%**	**42.9%**	**-73.6%**	**-66.7%**	**-16.9%**	**65.3%**
Africa	1.8%	-78.6%	-67.5%	-23.8%	45.5%	-70.1%	-62.9%	-13.7%	57.6%
Asia Pacific	19.1%	-95.6%	-88.5%	-49.4%	30.3%	-77.6%	-71.6%	-17.1%	63.8%
Europe	24.0%	-83.0%	-70.4%	-36.7%	49.5%	-71.8%	-64.9%	-17.0%	68.9%
Latin America	2.7%	-86.0%	-80.3%	-23.5%	57.7%	-70.7%	-67.2%	-8.9%	74.1%
Middle East	8.7%	-86.7%	-73.6%	-36.6%	37.0%	-70.6%	-62.9%	-15.9%	60.5%
North America	7.5%	-88.2%	-73.1%	-46.2%	36.2%	-74.4%	-65.8%	-21.2%	63.0%
Domestic	**36.2%**	**-40.8%**	**-29.7%**	**-13.2%**	**70.4%**	**-50.1%**	**-37.5%**	**-16.9%**	**66.9%**
Dom. Australia[4]	0.8%	-86.3%	-80.3%	-25.7%	58.0%	-69.4%	-64.2%	-11.8%	68.5%
Domestic Brazil[4]	1.1%	-44.5%	-41.7%	-4.1%	79.9%	-52.3%	-50.4%	-3.1%	79.5%
Dom. China P.R.[4]	9.8%	-1.4%	7.6%	-7.1%	78.3%	-43.8%	-32.1%	-14.6%	72.9%
Domestic Japan[4]	1.1%	-45.3%	-34.1%	-13.1%	64.5%	-56.3%	-34.1%	-24.6%	50.3%
Dom. Russian Fed.[4]	1.5%	-10.0%	0.4%	-8.7%	76.0%	-24.5%	-12.6%	-11.4%	72.6%
Domestic US[4]	14.0%	-60.7%	-45.7%	-23.8%	60.9%	-59.2%	-41.6%	-25.8%	59.7%

[1] % of industry RPKs in 2019   [2] Year-on-year change in load factor   [3] Load factor level

[4] Note: the seven domestic passenger markets for which broken-down data are available account for 30% of global total RPKs and approximately 83% of total domestic RPKs

Note: The total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registrated; it should not be considered as regional traffic.

NOV 2020:
Air Passenger Market Analysis

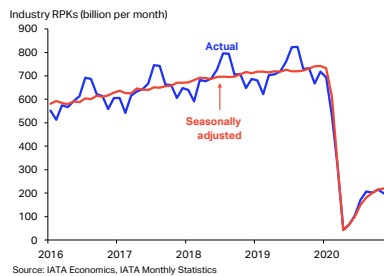**IATA**

Chart 1 – Air passenger volumes

Industry RPKs (billion per month)

Source: IATA Economics, IATA Monthly Statistics

Chart 2 – New COVID-19 cases by region

New COVID-19 cases per week

Source: WHO
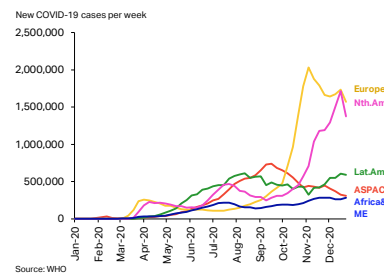
Chart 3: YoY change in net bookings between the UAE and the rest of the world

% year-on-year

Source: IATA Economics analysis based on DDS ticketing data   * excludes the UK
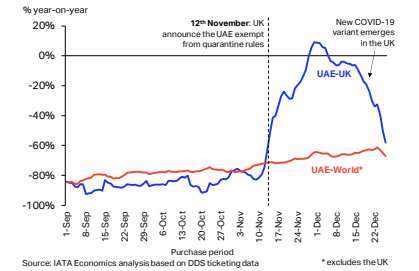
Chart 4: Activity on flight search websites
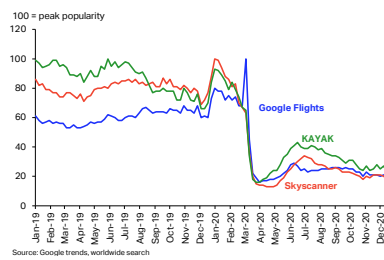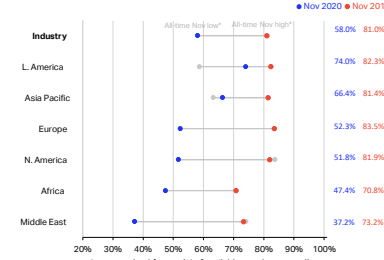
100 = peak popularity

Source: Google trends, worldwide search

Chart 5 – Passenger load factors by region

Sources: IATA Economics, IATA Monthly Statistics   *Data from 1990 onwards

Chart 6 – International RPK growth, yearly (airline region of registration basis)

Sources: IATA Economics, IATA Monthly Statistics

Chart 7 – International RPKs by route (segment-based)

RPK growth by int'l route and dom. market (latest month, % year-on-year*)

Sources: IATA Economics, IATA Monthly Statistics by Route

Chart 8 – Domestic RPK growth by market

Sources: IATA Economics, IATA Monthly Statistics
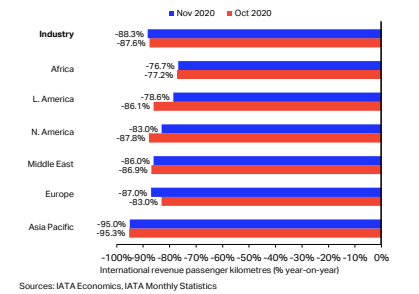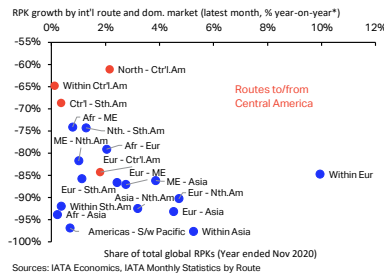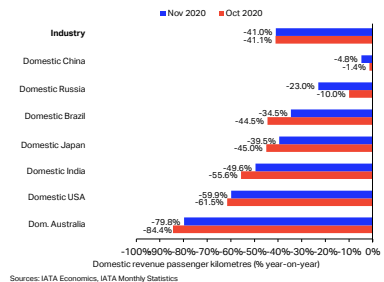
Air passenger market detail - November 2020

	World share [1]	November 2020 (% year-on-year)				% year-to-date			
		RPK	ASK	PLF (%-pt) [2]	PLF (level) [3]	RPK	ASK	PLF (%-pt) [2]	PLF (level) [3]
TOTAL MARKET	*100.0%*	**-70.3%**	**-58.6%**	**-23.0%**	**58.0%**	**-65.6%**	**-56.5%**	**-17.2%**	**65.5%**
Africa	*2.1%*	-75.6%	-63.6%	-23.4%	47.4%	-69.6%	-62.2%	-13.9%	57.8%
Asia Pacific	*34.6%*	-61.6%	-52.9%	-15.0%	66.4%	-61.7%	-54.0%	-13.8%	68.1%
Europe	*26.8%*	-82.2%	-71.6%	-31.2%	52.3%	-69.3%	-61.7%	-16.9%	68.5%
Latin America	*5.1%*	-59.8%	-55.3%	-8.3%	74.0%	-62.6%	-58.8%	-7.5%	75.1%
Middle East	*9.1%*	-84.5%	-69.5%	-36.1%	37.2%	-71.3%	-62.9%	-17.3%	58.8%
North America	*22.3%*	-67.6%	-48.7%	-30.1%	51.8%	-65.0%	-50.4%	-24.9%	59.8%
International	*63.8%*	**-88.3%**	**-77.4%**	**-38.7%**	**41.5%**	**-74.7%**	**-67.6%**	**-18.1%**	**64.0%**
Africa	*1.8%*	-76.7%	-63.7%	-25.2%	45.2%	-70.6%	-62.8%	-14.9%	56.4%
Asia Pacific	*19.1%*	-95.0%	-87.4%	-48.4%	31.6%	-79.0%	-73.0%	-17.9%	62.9%
Europe	*24.0%*	-87.0%	-76.5%	-37.4%	46.6%	-73.0%	-65.8%	-18.1%	67.7%
Latin America	*2.7%*	-78.6%	-72.0%	-19.5%	62.7%	-71.4%	-67.6%	-9.7%	73.3%
Middle East	*8.7%*	-86.0%	-71.0%	-37.9%	35.3%	-71.9%	-63.5%	-17.6%	58.5%
North America	*7.5%*	-83.0%	-66.1%	-40.5%	40.8%	-75.0%	-65.8%	-22.6%	61.4%
Domestic	*36.2%*	**-41.0%**	**-27.1%**	**-15.7%**	**66.6%**	**-49.3%**	**-36.6%**	**-16.8%**	**66.8%**
Dom. Australia [4]	*0.8%*	-79.8%	-70.8%	-25.8%	57.8%	-70.2%	-64.5%	-12.9%	67.6%
Domestic Brazil [4]	*1.1%*	-34.5%	-36.0%	1.8%	84.5%	-50.6%	-49.1%	-2.5%	80.1%
Dom. China P.R. [4]	*9.8%*	-4.8%	6.0%	-8.5%	74.7%	-32.6%	-21.8%	-11.7%	73.1%
Domestic India [4]	*1.6%*	-49.6%	-37.8%	-17.0%	72.8%	-56.9%	-50.0%	-12.1%	75.2%
Domestic Japan [4]	*1.1%*	-39.5%	-25.6%	-14.7%	64.0%	-53.9%	-33.9%	-22.5%	51.7%
Dom. Russian Fed. [4]	*1.5%*	-23.0%	-14.0%	-8.4%	71.6%	-24.4%	-12.8%	-11.1%	72.5%
Domestic US [4]	*14.0%*	-59.9%	-39.9%	-27.4%	54.8%	-59.4%	-41.5%	-26.1%	59.2%

[1] % of industry RPKs in 2019   [2] Year-on-year change in load factor   [3] Load factor level

[4] Note: the seven domestic passenger markets for which broken-down data are available accounted for 30% of global total RPKs and approximately 82% of total domestic RPKs in 2019

Note: The total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic.

STATISTICS

JULY 2020: Worldwide Traffic Results

Passenger traffic/Freight volumes
(*Summary*)

Table 1a: Summary Worldwide Traffic Results, July 2020 (% change)			
	July 2020 over July 2019	Year to date 2020	12-month rolling year
PaxFlash			
International passenger	(88.5)	(68.6)	(38.8)
Domestic passenger	(62.8)	(54.8)	(31.0)
Total passenger	(75.1)	(61.2)	(34.6)
FreightFlash			
International freight	(15.0)	(14.3)	(9.6)
Domestic freight	(1.4)	(7.0)	(4.3)
Total freight	(10.9)	(12.1)	(8.0)

TABLE 2a: PaxFlash summary – July 2020			
Regions	July 2020 % YOY	YTD July 2020 % YOY	YE thru July 2020 % YOY
International passengers			
Africa	(90.1)	(63.0)	(33.7)
Asia-Pacific	(97.3)	(72.7)	(42.0)
Europe	(83.5)	(69.2)	(38.3)
Latin America-Caribbean	(91.4)	(60.5)	(36.3)
Middle East	(93.0)	(63.3)	(35.2)
North America	(92.8)	(66.0)	(38.6)
World	(88.5)	(68.6)	(38.8)
Domestic passengers			
Africa	(84.5)	(56.8)	(29.6)
Asia-Pacific	(51.8)	(51.7)	(29.3)
Europe	(52.5)	(57.2)	(33.5)
Latin America-Caribbean	(79.6)	(54.8)	(30.5)
Middle East	...	...	...
North America	(69.9)	(56.3)	(31.6)
World	(62.8)	(54.8)	(31.0)
Total passengers			
Africa	(88.5)	(61.0)	(32.3)
Asia-Pacific	(68.5)	(59.6)	(34.3)
Europe	(76.6)	(66.4)	(37.2)
Latin America-Caribbean	(83.4)	(56.8)	(32.4)
Middle East	(90.7)	(62.2)	(35.4)
North America	(73.8)	(57.9)	(32.7)
World	(75.1)	(61.2)	(34.6)

TRAFFIC TABLE DEFINITIONS:

PASSENGER TRAFFIC: departing + arriving passengers
INTERNATIONAL: traffic performed between the designated airport and an airport in another country/territory
DOMESTIC: traffic performed between two airports located in the same country/territory
TOTAL: international + domestic passengers + direct transit passengers counted once (when breakdown is available)
Year-over-year percentage changes (% YOY) are calculated from a representative sample.

YOY Year-over-year same month comparison
YTD Year to date, starting Jan 2019, compared to same period in previous year
YE Year end, based on a rolling 12-month period, compared to the same prior 12-month perio

JUL 2020: Worldwide Traffic Results
Passenger traffic/Freight volumes
(Summary)

TABLE 3a: FreightFlash summary – July 2020			
Regions	July 2020 % YOY	YTD July 2020 % YOY	YE thru July 20 2020 % YOY
International freight			
Africa	(22.4)	(21.5)	(14.6)
Asia-Pacific	(12.5)	(13.3)	(9.1)
Europe	(14.3)	(13.3)	(8.1)
Latin America-Caribbean	(23.3)	(19.6)	(13.6)
Middle East	(36.6)	(23.7)	(14.3)
North America	(2.8)	(8.7)	(7.7)
World	(15.0)	(14.3)	(9.6)
Domestic freight			
Africa	…	…	…
Asia-Pacific	(21.9)	(23.1)	(12.8)
Europe	(13.1)	(18.0)	(9.3)
Latin America-Caribbean	(34.5)	(31.7)	(19.9)
Middle East	…	…	…
North America	12.7	3.5	1.6
World	(1.4)	(7.0)	(4.3)
Total freight			
Africa	(23.1)	(21.9)	(14.6)
Asia-Pacific	(15.1)	(15.9)	(10.1)
Europe	(14.6)	(13.7)	(8.3)
Latin America-Caribbean	(26.5)	(23.0)	(15.2)
Middle East	(36.6)	(23.8)	(14.4)
North America	6.3	(1.5)	(2.2)
World	(10.9)	(12.1)	(8.0)

TRAFFIC TABLE DEFINITIONS:

FREIGHT TRAFFIC: loaded and unloaded freight; data in metric tonnes
INTERNATIONAL: traffic performed between the designated airport and an airport in another country/territory
DOMESTIC: traffic performed between two airports located in the same country/territory
TOTAL: international + domestic freight (when breakdown is available)
Note: No domestic freight traffic is reported by airports in the Middle East and Africa regions.
Year-over-year percentage changes (% YOY) are calculated from a representative sample.

YOY Year-over-year same month comparison
YTD Year to date, starting Jan 2019, compared to same period in previous year
YE Year end, based on a rolling 12-month period, compared to same prior 12-month period

AUG 2020: Worldwide Traffic Results

Passenger traffic/Freight volumes
(Summary)

ACI
AIRPORTS COUNCIL INTERNATIONAL

Table 1b: Summary Worldwide Traffic Results, August 2020 (% change)			
	August 2020 over August 2019	Year to date 2020	12-month rolling year
PaxFlash			
International passenger	(83.5)	(70.9)	(47.5)
Domestic passenger	(56.7)	(55.2)	(36.3)
Total passenger	(69.4)	(62.4)	(41.4)
FreightFlash			
International freight	(12.0)	(13.8)	(10.1)
Domestic freight	(7.4)	(7.7)	(5.1)
Total freight	(10.7)	(12.1)	(8.7)

TABLE 2b: PaxFlash summary – August 2020			
Regions	August 2020 % YOY	YTD August 2020 % YOY	YE thru August 2020 % YOY
International passengers			
Africa	(86.6)	(66.6)	(43.3)
Asia-Pacific	(97.1)	(75.8)	(50.7)
Europe	(75.6)	(70.4)	(47.0)
Latin America-Caribbean	(89.8)	(64.4)	(44.3)
Middle East	(90.7)	(67.4)	(44.5)
North America	(90.6)	(69.4)	(47.5)
World	(83.5)	(70.9)	(47.5)
Domestic passengers			
Africa	(72.5)	(58.8)	(36.3)
Asia-Pacific	(46.8)	(51.3)	(33.7)
Europe	(36.8)	(54.4)	(36.9)
Latin America-Caribbean	(75.0)	(58.0)	(37.4)
Middle East	...	...	...
North America	(66.7)	(57.7)	(37.8)
World	(56.7)	(55.2)	(36.3)
Total passengers			
Africa	(82.5)	(64.1)	(41.1)
Asia-Pacific	(64.3)	(60.2)	(39.8)
Europe	(67.2)	(66.6)	(44.6)
Latin America-Caribbean	(79.6)	(60.0)	(39.6)
Middle East	(90.3)	(67.3)	(44.4)
North America	(70.8)	(59.6)	(39.4)
World	(69.4)	(62.4)	(41.4)

TRAFFIC TABLE DEFINITIONS:

PASSENGER TRAFFIC: departing + arriving passengers
INTERNATIONAL: traffic performed between the designated airport and an airport in another country/territory
DOMESTIC: traffic performed between two airports located in the same country/territory
TOTAL: international + domestic passengers + direct transit passengers counted once (when breakdown is available)
Year-over-year percentage changes (% YOY) are calculated from a representative sample.

YOY Year-over-year same month comparison
YTD Year to date, starting Jan 2019, compared to same period in previous year
YE Year end, based on a rolling 12-month period, compared to the same prior 12-month perio

AUG 2020: Worldwide Traffic Results
Passenger traffic/Freight volumes
(Summary)

TABLE 3b: FreightFlash summary – August 2020			
Regions	**August 2020 % YOY**	**YTD August 2020 % YOY**	**YE thru August 20 2020 % YOY**
International freight			
Africa	(19.1)	(20.8)	(15.3)
Asia-Pacific	(11.5)	(13.1)	(9.7)
Europe	(11.7)	(13.1)	(8.8)
Latin America-Caribbean	(16.7)	(18.6)	(14.0)
Middle East	(28.6)	(23.6)	(16.1)
North America	(0.8)	(7.8)	(7.1)
World	(12.0)	(13.8)	(10.1)
Domestic freight			
Africa	...	...	...
Asia-Pacific	(21.5)	(24.9)	(15.4)
Europe	(10.3)	(17.3)	(10.7)
Latin America-Caribbean	(28.3)	(31.5)	(22.1)
Middle East	...	...	...
North America	1.5	3.3	1.8
World	(7.4)	(7.7)	(5.1)
Total freight			
Africa	(19.9)	(21.2)	(15.4)
Asia-Pacific	(14.2)	(16.2)	(11.2)
Europe	(12.0)	(13.5)	(9.0)
Latin America-Caribbean	(20.3)	(22.5)	(16.4)
Middle East	(28.6)	(23.8)	(16.2)
North America	0.1	(1.3)	(1.9)
World	(10.7)	(12.1)	(8.7)

TRAFFIC TABLE DEFINITIONS:

FREIGHT TRAFFIC: loaded and unloaded freight; data in metric tonnes
INTERNATIONAL: traffic performed between the designated airport and an airport in another country/territory
DOMESTIC: traffic performed between two airports located in the same country/territory
TOTAL: international + domestic freight (when breakdown is available)
Note: No domestic freight traffic is reported by airports in the Middle East and Africa regions.
Year-over-year percentage changes (% YOY) are calculated from a representative sample.

YOY Year-over-year same month comparison
YTD Year to date, starting Jan 2019, compared to same period in previous year
YE Year end, based on a rolling 12-month period, compared to same prior 12-month period

STATISTICS

ECONOMIC DEVELOPMENT
AUG 2020: Air Transport Monthly Monitor

ICAO

World Results and Analyses. Total scheduled services
(Domestic and international)

http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx

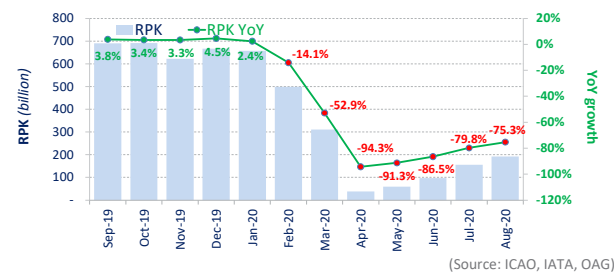| GLOBAL KEY FIGURES	AUG 2020 *(versus AUG 2019)*	OUTLOOK* - SEP 2020 *(versus SEP 2019)*
	RPK ▼ -75.3% ASK ▼ -63.8% FTK ▼ -12.6% LF: 58.5% ▲ +0.6 pt	ASK ▼ -60.7% * Source OAG

PASSENGER TRAFFIC
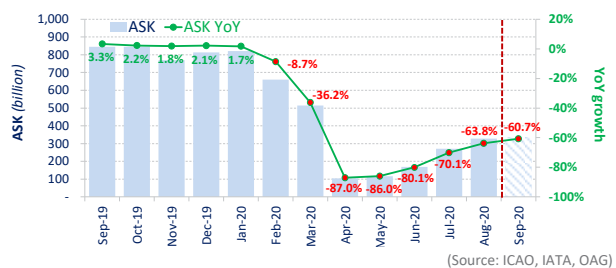
Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -75.3% YoY in August 2020, +4.5 percentage points up from the decline in the previous month. Air travel demand in all regions improved modestly with Asia/Pacific showing the fastest recovery while the Middle East being the weakest performer due to the sluggish international traffic. Domestic travel remained as the main contributor to recovery globally with significant improvements in major markets, particularly China and Russia Federation; the latter also became the first to rebound back to pre-pandemic level.

(Source: ICAO, IATA, OAG)

International Traffic vs. Tourist Arrivals

International passenger traffic fell by -88.3% YoY in August 2020, +3.6 percentage points up from the decline in the previous month. International air travel demand globally remained severely curtailed at less than 10% of the 2019 level, except for Europe which showed increases in intra-regional travel and recovered to around 20%.

The international tourist arrivals remained stagnant and is expected to follow a similar trend as international passenger traffic.

*UNWTO Definition

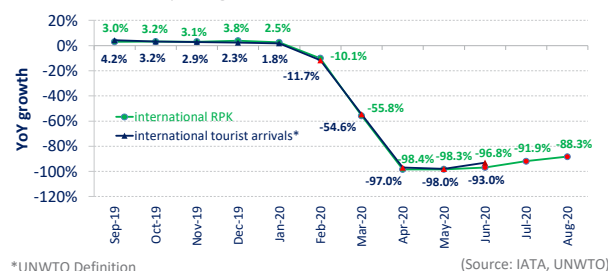(Source: IATA, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -63.8% YoY in August 2020, +6.3 percentage points up from the decline in the previous month (-70.1%).

Contraction in world capacity is expected to ease in September to -60.7% down YoY, as airlines continue to resume more operations.

(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 58.5% in August 2020, +0.6 percentage point higher than the previous month.

As recovery in air travel demand was still slower than capacity rebound, the August LF was -27.2 percentage points lower than the rate in the same period of 2019.
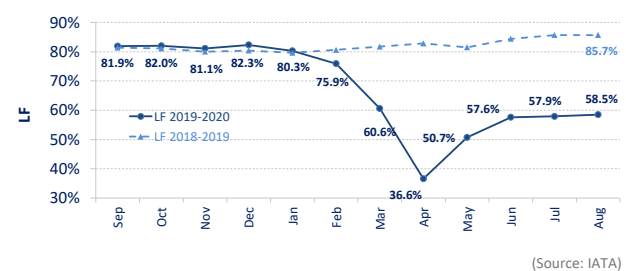
(Source: IATA)

FREIGHT TRAFFIC

Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -12.6% YoY in August 2020, +0.9 percentage point up from the fall in the previous month. For the first time since May, all regions posted improvements in air cargo recovery; however, the overall upward trend has eased slightly due to the slowdown in certain major markets. Pace of recovery by region differs at varying degrees, with Africa continued to demonstrate more resilience with stronger demand and became the only region recording positive growth. Significant upswing was seen in the Middle East while the recovery stalled in Asia/Pacific. Economic activities are expected to recover with stabilizing industrial production and export orders, which will support the recovery in air cargo demand in the coming months.
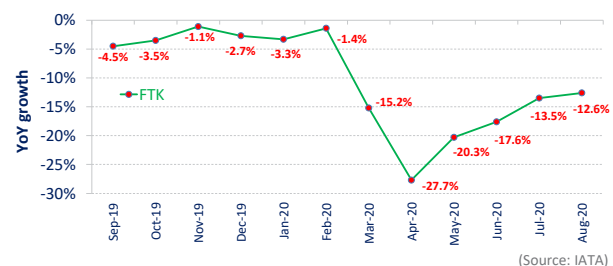
(Source: IATA)

ACRONYMS: **ACI:** Airports Council International; **ASK:** Available Seat-Kilometres; **IATA:** International Air Transport Association; **FTK:** Freight Tonne-Kilometres; **LF:** Passenger Load Factor; **OAG:** Official Airline Guide; **RPK:** Revenue Passenger-Kilometres; **UNWTO:** World Tourism Organization; **YoY:** Year-on-year; **YTD:** Year-to-date.

ECONOMIC DEVELOPMENT
AUG 2020: Air Transport Monthly Monitor
World Results and Analyses. Total scheduled services
(Domestic and international)

ICAO

TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

AUG 2020: -28.8%, -41.5%, and +1.9% YoY in terms of aircraft departures, passengers and freight for the Top 15

AUG 20

Airports (ranking by number of departures)	Departures	YoY	Airports (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Atlanta GA, US (ATL)	23,696	-41.5%	Guangzhou, CN (CAN)	2,304,846	-30.0%	Memphis TN, US (MEM)	380,582	4.6%
Chicago IL, US (ORD)	23,000	-44.6%	Chengdu, CN (CTU)	2,190,914	-13.3%	Hong Kong SAR, CN (HKG)	370,000	-2.2%
Dallas/Fort Worth TX, US (DFW)	22,401	-32.1%	Shenzhen, CN (SZX)	1,999,460	-14.8%	Shanghai, CN (PVG)	298,310	2.1%
Denver CO, US (DEN)	19,934	-31.6%	Kunming, CN (KMG)	1,916,054	-12.7%	Anchorage AK, US (ANC)	284,367	25.4%
Guangzhou, CN (CAN)	18,593	-12.1%	Xi'An, CN (XIY)	1,783,064	-18.9%	Louisville KY, US (SDF)	230,031	-1.5%
Charlotte NC, US (CLT)	16,464	-33.4%	Beijing, CN (PEK)	1,777,309	-60.6%	Incheon, KR (ICN)	225,124	2.5%
Shanghai, CN (PVG)	16,347	-23.0%	Shanghai, CN (PVG)	1,698,382	-49.4%	Taipei, CN (TPE)	206,414	12.9%
Shenzhen, CN (SZX)	15,723	-0.5%	Shanghai, CN (SHA)	1,680,578	-12.8%	Los Angeles CA, US (LAX)	184,436	9.1%
Chengdu, CN (CTU)	15,193	-4.0%	Dallas/Fort Worth TX, US (DFW)	1,633,377	-52.5%	Doha, QA (DOH)	183,828	5.6%
Kunming, CN (KMG)	15,006	-5.4%	Hangzhou, CN (HGH)	1,576,986	-11.5%	Miami FL, US (MIA)	183,361	11.8%
Long Beach CA, US (LGB)	14,857	-2.9%	Atlanta GA, US (ATL)	1,497,570	-69.7%	Chicago IL, US (ORD)	168,976	15.7%
Beijing, CN (PEK)	14,772	-42.8%	Denver CO, US (DEN)	1,492,841	-53.8%	Frankfurt, DE (FRA)	152,835	-6.4%
Los Angeles CA, US (LAX)	14,291	-53.7%	Jeju, KR (CJU)	1,163,549	-20.0%	Tokyo, JP (NRT)	149,954	-10.9%
Xi'An, CN (XIY)	14,085	-8.4%	Moscow, RU (DME)	1,147,752	-27.4%	Guangzhou, CN (CAN)	146,352	-4.9%
Anchorage AK, US (ANC)	13,919	-17.2%	Chicago IL, US (ORD)	1,140,739	-71.4%	Dubai, AE (DXB)	135,384	-33.3%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, all the Top 15 airports reported declines with a combined fall of **-28.8%** YoY. The list was comprised of eight US and seven Chinese airports. **Atlanta** ranked **1st** followed by Chicago and Dallas/Fort Worth. Most Chinese airports in the Top 15 held median positions and showed smaller declines, with **Shenzhen** recording the smallest decline of **-0.5%**.

In terms of **passengers**, all the Top 15 airports posted declines with a total fall of **-41.5%** YoY. The list continued to be dominated by Chinese and US airports. The Top 8 were only Chinese airports with **Guangzhou** retaining the **1st** position. Similar to departures, overall smaller declines were observed in Chinese airports. **Moscow** made it to the Top 15 owing to the bullish domestic traffic growth.

In terms of **freight**, the Top 15 airports reported a YoY increase of **+1.9%**. This was the third consecutive growth since June, and over half of the Top 15 posted YoY increase with the strongest growth recorded by Anchorage (**+25.4%**). **Memphis** remained at **1st** growing at **+4.6%**, followed by **Hong Kong** (**-2.2%**) and **Shanghai** (**+2.1%**).

TOP 15 AIRLINE GROUPS (Ranked by RPK)

AUG 2020: -66.9% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 58.1% of the world's total RPK in August 2020 and declined by **-66.9%** YoY. This decline was 8.4 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

The Top 15 list was the same as the previous month, dominated by airlines in China, US and Europe, with few movements in the rankings due to the diverging recovery pace by country.

China Southern, China Eastern and **Air China** remained at Top 3, with traffic recovered to over 50% of the 2019 level. Two other Chinese airlines, **Hainan Airlines** and **Spring Airlines** have slipped down the list to **11th** and **15th**, respectively, as major airlines in other regions continued to recover. Nevertheless, Spring Airlines recorded the fastest recovery with traffic returning to 88.6% of the 2019 level.

Both **American** and **Southwest** fell 1 position to **5th** and **6th**, overtaken by Aeroflot. **Delta** and **United** continued to record relatively slower recovery with traffic at around merely 20% of the 2019 level, and ranked **8th** and **10th**, respectively.

Airlines in Europe recorded gradual improvements with more noticeable increase recorded by **Aeroflot**, which ranked 2 positions up to **4th** and recovered to almost 50% of the 2019 traffic level. **AF-KLM** and **Ryanair** went up to **7th** and **9th**, respectively. Other airlines in the Top 15 improved modestly.

AUG 20

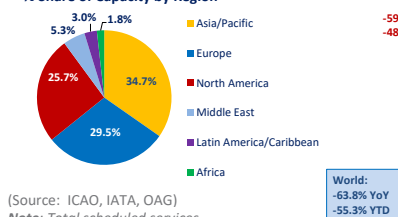|	RPK (billion)	YoY	% Share of World Total	Cumulative % Share
China Southern	15.2	-44.0%	7.9%	7.9%
China Eastern	11.4	-44.0%	5.9%	13.8%
Air China	10.8	-49.4%	5.6%	19.4%
Aeroflot	7.9	-51.6%	4.1%	23.6%
American[1]	7.6	-76.1%	4.0%	27.5%
Southwest[1]	7.5	-58.0%	3.9%	31.4%
AF-KLM[1]	7.4	-73.5%	3.9%	35.3%
Delta[1]	7.3	-80.6%	3.8%	39.1%
Ryanair[1]	6.7	-63.0%	3.5%	42.6%
United[1]	6.5	-80.0%	3.4%	46.0%
Hainan Airlines	5.7	-44.1%	3.0%	49.0%
Lufthansa Group[1]	5.4	-81.5%	2.8%	51.8%
IAG[1]	4.9	-82.8%	2.5%	54.3%
Turkish Airlines	4.1	-72.8%	2.1%	56.5%
Spring Airlines	3.2	-11.4%	1.7%	58.1%
Top 15 Total RPKs	**112** billion	**-66.9%**	**58.1%**	
World Total RPKs	**192** billion	**-75.3%**	**100.0%**	

(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

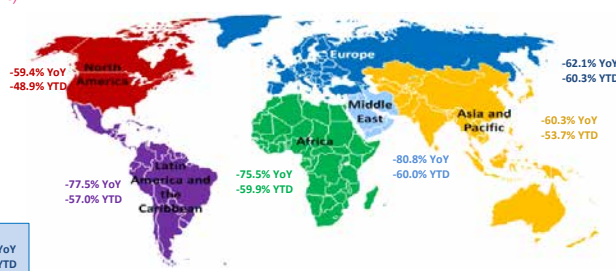## CAPACITY BY REGION *(ICAO Statistical Regions)*

AUG 2020: -63.8% YoY in terms of World ASK

% Share of Capacity by Region

- Asia/Pacific — 34.7%
- Europe — 29.5%
- North America — 25.7%
- Middle East — 5.3%
- Latin America/Caribbean — 3.0%
- Africa — 1.8%

North America: -59.4% YoY, -48.9% YTD
Europe: -62.1% YoY, -60.3% YTD
Middle East: -80.8% YoY, -60.0% YTD
Asia and Pacific: -60.3% YoY, -53.7% YTD
Latin America and the Caribbean: -77.5% YoY, -57.0% YTD
Africa: -75.5% YoY, -59.9% YTD

World: -63.8% YoY, -55.3% YTD

(Source: ICAO, IATA, OAG)
Note: Total scheduled services

Worldwide capacity contracted by -63.8% YoY in August 2020. Capacity improvements were observed in all regions with a relatively stronger increase in Europe where lockdowns and cross-border travel restrictions eased during the summer period.

North America and Asia/Pacific posted the fastest recovery in capacity, at around 60% below the pre-COVID-19 level.

* Embarked Passengers   ** Loaded and Unloaded Freight in Tonnes   1. ICAO estimates

ACRONYMS: **ACI:** Airports Council International; **ASK:** Available Seat-Kilometres; **IATA:** International Air Transport Association; **FTK:** Freight Tonne-Kilometres; **LF:** Passenger Load Factor; **OAG:** Official Airline Guide; **RPK:** Revenue Passenger-Kilometres; **UNWTO:** World Tourism Organization; **YoY:** Year-on-year; **YTD:** Year-to-date.

ECONOMIC DEVELOPMENT
SEP 2020: Air Transport Monthly Monitor

World Results and Analyses. Total scheduled services
(Domestic and international)

ICAO

http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx

GLOBAL KEY FIGURES	SEP 2020 *(versus SEP 2019)*				OUTLOOK* - OCT 2020 *(versus OCT 2019)*	
	RPK ▼ -72.8%	ASK ▼ -63.0%	FTK ▼ -8.0%	LF: 60.1% ▲ +1.6 pt	ASK ▼ -63.0%	* Source OAG

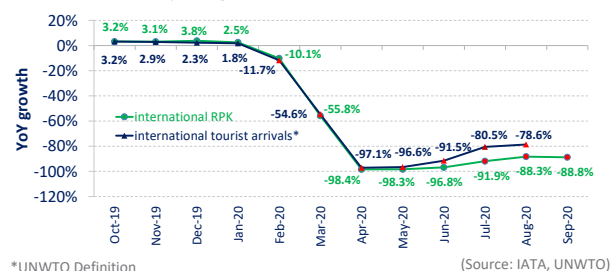## PASSENGER TRAFFIC

Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -72.8% YoY in September 2020, +2.5 percentage points up from the decline in the previous month. All regions posted improvements except in Europe which was suppressed by the tightened travel restrictions due to the resurgence of outbreaks in the region. Asia/Pacific continued to lead the pace of recovery while Latin America/Caribbean also gained momentum from the domestic travel in Brazil. Among the major domestic markets, growth in Russian Federation remained positive, and the demand increase in China has been sharp.

(Source: ICAO, IATA, OAG)
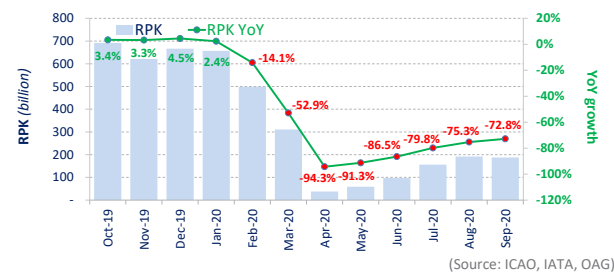
International Traffic vs. Tourist Arrivals

International passenger traffic fell by -88.8% YoY in September 2020, -0.5 percentage point down from the decline in the previous month. International travel further weakened, as the main driver for international traffic recovery - Intra Europe travel demand - has softened amid the re-imposed lockdowns.

The international tourist arrivals remained stagnant and is expected to follow a similar trend as international passenger traffic.

*UNWTO Definition

(Source: IATA, UNWTO)

CAPACITY

Available Seat-Kilometres - ASK

Capacity worldwide fell by -63.0% YoY in September 2020, +0.8 percentage point up from the decline in the previous month (-63.8%).

As some regions may see capacity cut in response to the stricter measures, overall fall of world capacity in October is expected to be unchanged.

(Source: ICAO, IATA, OAG)

Load Factor - LF

The passenger Load Factor reached 60.1% in September 2020, +1.6 percentage points higher than the previous month.

The fall in travel demand was deeper than the capacity cut, as a result, the September LF was -21.8 percentage points lower than the rate in the same period of 2019.
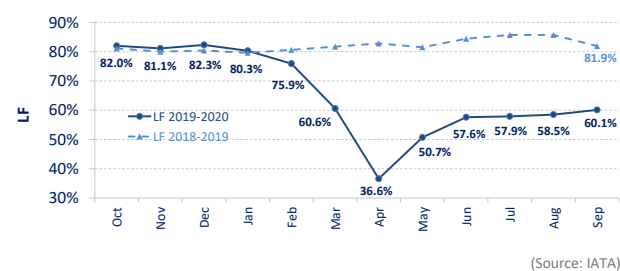
(Source: IATA)

FREIGHT TRAFFIC

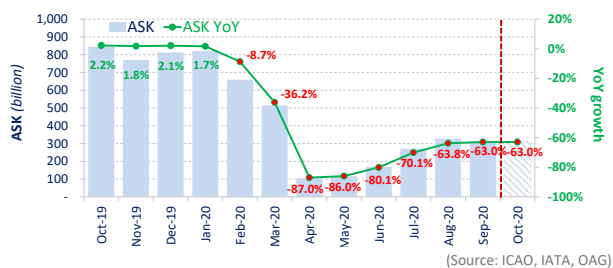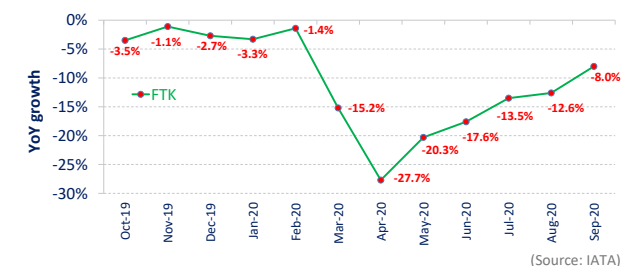### Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -8.0% YoY in September 2020, +4.6 percentage points up from the fall in the previous month. Air cargo showed an expedited recovery with solid improvements in all regions. Africa and North America, in particular, have returned back to pre-pandemic levels and achieved a robust positive YoY growth of over +8%, outperforming other regions. The uptick was supported by the rebound in consumer spending on goods and services after the gradual economic re-opening. The Middle East was also resilient, closely approaching the 2019 level, while recovery in other regions was slower with Latin America/Caribbean showing the steepest YoY decline of over -20%.

(Source: IATA)

ACRONYMS: **ACI:** Airports Council International; **ASK:** Available Seat-Kilometres; **IATA:** International Air Transport Association; **FTK:** Freight Tonne-Kilometres; **LF:** Passenger Load Factor; **OAG:** Official Airline Guide; **RPK:** Revenue Passenger-Kilometres; **UNWTO:** World Tourism Organization; **YoY:** Year-on-year; **YTD:** Year-to-date.

STATISTICS

ECONOMIC DEVELOPMENT
SEP 2020: Air Transport Monthly Monitor
ICAO

World Results and Analyses. Total scheduled services
(Domestic and international)

TOP 15 AIRPORTS (Ranked by aircraft departures, passengers and volume of freight)

SEP 2020: -24.5%, -37.0%, and +6.9% YoY in terms of aircraft departures, passengers and freight for the Top 15

SEP 20

Airports (ranking by number of departures)	Departures	YoY	Airports (ranking by number of passengers)	Passengers*	YoY	Airports (ranking by tonnes of freight)	Freight**	YoY
Atlanta GA, US (ATL)	22,123	▼ -39.0%	Guangzhou, CN (CAN)	2,308,170	▼ -23.3%	Memphis TN, US (MEM)	387,737	▲ 17.5%
Chicago IL, US (ORD)	21,880	▼ -44.1%	Chengdu, CN (CTU)	2,282,135	▲ 0.6%	Hong Kong SAR, CN (HKG)	384,000	▼ -3.3%
Dallas/Fort Worth TX, US (DFW)	20,705	▼ -32.5%	Beijing, CN (PEK)	1,985,079	▼ -51.2%	Shanghai, CN (PVG)	319,462	▲ 2.1%
Guangzhou, CN (CAN)	18,021	▼ -12.0%	Shenzhen, CN (SZX)	1,964,196	▼ -9.5%	Anchorage AK, US (ANC)	291,186	▲ 27.6%
Denver CO, US (DEN)	17,715	▼ -35.4%	Shanghai, CN (PVG)	1,813,270	▼ -41.1%	Incheon, KR (ICN)	244,730	▲ 10.1%
Shanghai, CN (PVG)	16,912	▼ -20.1%	Xi'An, CN (XIY)	1,804,245	▼ -9.5%	Louisville KY, US (SDF)	241,883	▲ 16.1%
Charlotte NC, US (CLT)	16,127	▼ -32.9%	Shanghai, CN (SHA)	1,793,488	▼ -4.3%	Taipei, CN (TPE)	210,103	▲ 14.3%
Chengdu, CN (CTU)	15,599	▲ 2.9%	Kunming, CN (KMG)	1,790,713	▼ -7.8%	Los Angeles CA, US (LAX)	194,054	▲ 21.6%
Shenzhen, CN (SZX)	15,451	▲ 1.3%	Dallas/Fort Worth TX, US (DFW)	1,696,340	▼ -44.8%	Doha, QA (DOH)	188,362	▲ 4.4%
Beijing, CN (PEK)	14,773	▼ -40.4%	Hangzhou, CN (HGH)	1,581,494	▼ -6.5%	Miami FL, US (MIA)	188,339	▲ 18.8%
Phoenix AZ, US (DVT)	14,082	▼ -21.9%	Atlanta GA, US (ATL)	1,562,116	▼ -64.2%	Dubai, AE (DXB)	174,618	▼ -15.4%
Kunming, CN (KMG)	14,073	▼ -2.1%	Denver CO, US (DEN)	1,450,959	▼ -51.3%	Tokyo, JP (NRT)	162,704	▼ -8.0%
Xi'An, CN (XIY)	13,655	▼ -6.1%	Charlotte NC, US (CLT)	1,179,388	▼ -41.3%	Guangzhou, CN (CAN)	158,738	▼ -2.5%
Long Beach CA, US (LGB)	13,293	▼ -0.6%	Chicago IL, US (ORD)	1,165,818	▼ -67.1%	Frankfurt, DE (FRA)	157,923	▼ -4.1%
Phoenix AZ, US (AZA)	13,229	▲ 0.6%	Antalya, TR (AYT)	1,126,313	▼ -53.5%	Chicago IL, US (ORD)	157,195	▲ 8.1%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of **aircraft departures**, the Top 15 airports reported a combined fall of **-24.5%** YoY. For the first time since the pandemic, a few airports posted positive growth, i.e. **Chengdu** (+2.9%), **Shenzhen** (+1.3%) and **Phoenix** (+0.6%). The Top 15 list comprised of US and Chinese airports. **Atlanta** retained the **1st** position, followed by **Chicago** and **Dallas/Fort Worth**.

In terms of **passengers**, the Top 15 airports posted a total fall of **-37.0%** YoY. Similar to departures, YoY increase re-emerged in the list since March, albeit only in one airport, **Chengdu** (+0.6%). Nine out of the Top 15 airports were Chinese airports, most of which also recorded smaller YoY declines. In addition, five US airports and one Turkish airport ranked within the Top 15.

In terms of **freight**, the Top 15 airports reported a YoY increase of **+6.9%**, indicating four consecutive monthly growth since June. Ten out of the Top 15 posted YoY increase with seven growing double-digitally. **Anchorage** and **Los Angeles** recorded the strongest growth at **+27.6%** and **+21.6%**, respectively. **Memphis** remained **1st** with an increase of **+17.5%**.

TOP 15 AIRLINE GROUPS (Ranked by RPK)

SEP 2020: -60.6% YoY in terms of RPK for the Top 15

In terms of RPK, the Top 15 airline groups accounted for 63.7% of the world's total RPK in September 2020 and declined by -60.6% YoY. This decline was 12.2 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

The distortion in Top 15 rankings reflects the uneven recovery across the globe. Countries with bigger domestic market have demonstrated more resilience.

Owing to the steady increase in domestic demand, Chinese airlines, **China Southern, Hainan Airlines, China Eastern** and **Air China** ranked Top 4, with traffic being recovered to over 60% of the 2019 level. Noticeable improvement was recorded by **Hainan Airlines** which climbed up 9 positions and made it to **2nd** for the first time. **Spring Airlines** kept the **15th** place, and recorded the fastest recovery with traffic returning to 96.0% of the 2019 level.

Recovery of US airlines has been modest. **American** stayed at **5th** while **Southwest** went down to **10th** surpassed by few other major airlines. **Delta** and **United** improved to **6th** and **7th**, respectively, posting gradual improvements.

After a short-lived summer recovery, the upward trend in European airlines stalled due to the new lockdown restrictions introduced in reaction to the second wave in the region. Except for **Aeroflot** which recovered to almost 50% of the 2019 level, the other airlines remained weak at below 70%.

SEP 20

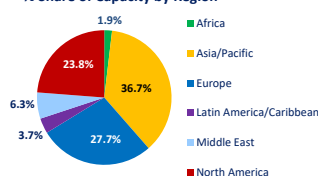|	RPK (billion)	YoY	% Share of World Total	Cumulative % Share
China Southern	17.1	▼ -27.5%	9.1%	9.1%
Hainan Airlines	12.5	▼ -10.5%	6.6%	15.8%
China Eastern	12.2	▼ -32.2%	6.5%	22.3%
Air China	11.7	▼ -38.7%	6.2%	28.5%
American[1]	9.3	▼ -66.3%	5.0%	33.5%
Delta[1]	8.4	▼ -73.5%	4.5%	37.9%
United[1]	7.7	▼ -71.6%	4.1%	42.0%
Aeroflot	7.1	▼ -51.2%	3.8%	45.8%
AF-KLM[1]	7.0	▼ -72.6%	3.7%	49.5%
Southwest[1]	6.2	▼ -61.3%	3.3%	52.8%
Lufthansa Group[1]	4.8	▼ -82.5%	2.5%	55.4%
Ryanair[1]	4.3	▼ -76.0%	2.3%	57.6%
IAG[1]	4.2	▼ -82.8%	2.3%	59.9%
Turkish Airlines	4.0	▼ -71.0%	2.1%	62.0%
Spring Airlines	3.2	▼ -4.0%	1.7%	63.7%
Top 15 Total RPKs	**120** billion	▼ -60.6%	63.7%	
World Total RPKs	**188** billion	▼ -72.8%	100.0%	

(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

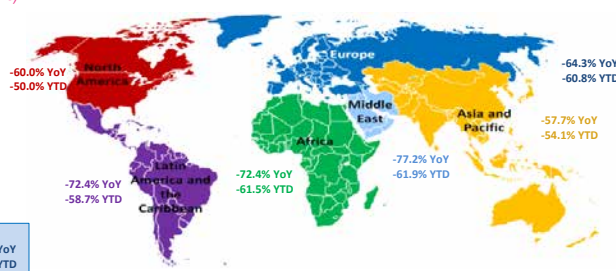## CAPACITY BY REGION *(ICAO Statistical Regions)*

SEP 2020: -63.0% YoY in terms of World ASK

% Share of Capacity by Region

- 1.9% Africa
- 36.7% Asia/Pacific
- 27.7% Europe
- 3.7% Latin America/Caribbean
- 6.3% Middle East
- 23.8% North America

(Source: ICAO, IATA, OAG)

Note: Total scheduled services

North America -60.0% YoY -50.0% YTD
Europe -64.3% YoY -60.8% YTD
Middle East -77.2% YoY -61.9% YTD
Asia and Pacific -57.7% YoY -54.1% YTD
Africa -72.4% YoY -61.5% YTD
Latin America and the Caribbean -72.4% YoY -58.7% YTD
World: -63.0% YoY -56.2% YTD

Worldwide capacity contracted by **-63.0% YoY** in September 2020. Although this indicated a smaller fall compared to the previous month, improvements eased in two regions, i.e. Europe and North America, with more airlines further cutting capacity.

The biggest increase was observed in Latin America/Caribbean while Asia/Pacific showed the smallest YoY capacity decline.

* Embarked Passengers   ** Loaded and Unloaded Freight in Tonnes   1. ICAO estimates

ACRONYMS: **ACI:** Airports Council International;   **ASK:** Available Seat-Kilometres;   **IATA:** International Air Transport Association;   **FTK:** Freight Tonne-Kilometres;   **LF:** Passenger Load Factor;   **OAG:** Official Airline Guide;   **RPK:** Revenue Passenger-Kilometres;   **UNWTO:** World Tourism Organization;   **YoY:** Year-on-year;   **YTD:** Year-to-date.