



# HERMES

AIR TRANSPORT ORGANISATION

THE MAGAZINE

13 | JANUARY - MARCH 2021

## MONTSERRAT BARRIGA

Director General  
ERA





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**Dr Kostas Iatrou**  
Director General,  
Hermes - Air Transport Organisation



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**January - March 2021**  
Latest Industry News and Updates



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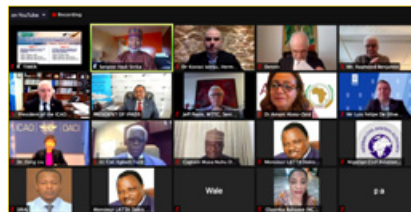
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# EDITORIAL



**Dr Kostas Iatrou**  
Director General  
Hermes - Air Transport Organisation

Dear Hermes member,

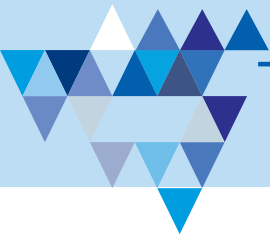
Since the beginning of 2021 Hermes, despite the current constraints, has actively participated and/or organised key events. On the 18th of February, the Hellenic Aviation Society's Executive Webinar was set under the Hermes' auspices. Many Board members participated in the Executive Panel of this webinar. In March I had the pleasure to speak in a High Level Ministerial Meeting on Enhancing Air Transport Connectivity and Growth in West Africa held on the 17th & 18th and organised by Nigerian Federal Ministry of Aviation and iPADIS, one of Hermes partners.

Finally, on the 19th of April Hermes co-organised with Aeronautica Civil de Colombia a webinar entitled: "The Latin America Air Transport sector in the post COVID-19 era: Resilience and efficiency through Leadership and Cooperation". This was the first event that Hermes organised focusing on Latin America.

In February the 36-State governing body of the International Civil Aviation Organization (ICAO), the ICAO Council, appointed Mr. Juan Carlos Salazar of Colombia, an Hermes member, as the new Secretary General of the Organization for a three-year term, beginning 1 August 2021. I would like to congratulate Juan Carlos on his new appointment. We also have the pleasure to welcome the interview of Montserrat Barriga, Director General of ERA.

Enjoy reading,

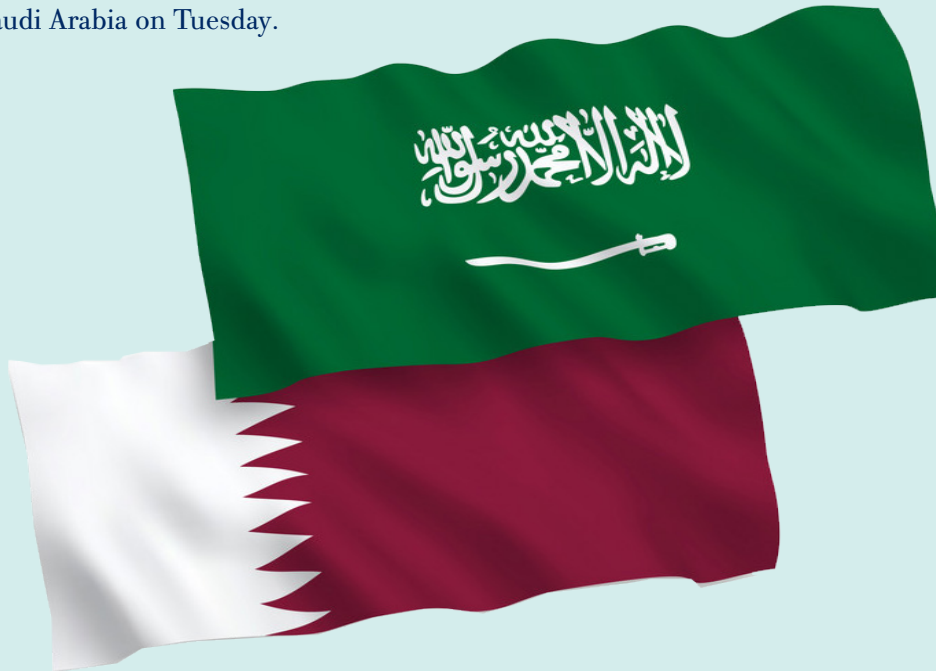
*Kostas Iatrou*



04/01/2021

## **AN AGREEMENT HAS BEEN REACHED TO OPEN AIRSPACE AND LAND AND SEA BORDERS BETWEEN SAUDI ARABIA AND QATAR AS OF THIS EVENING**

"An agreement has been reached to open airspace and land and sea borders between Saudi Arabia and Qatar as of this evening," Kuwaiti Foreign Minister Ahmad Nasser al-Sabah said on Kuwait TV ahead of a GCC summit in Saudi Arabia on Tuesday.



06/01/2021

## **FAA ANNOUNCES FINAL RULE TO FACILITATE THE REINTRODUCTION OF CIVIL SUPERSONIC FLIGHT**

Today the U.S. Department of Transportation and the Federal Aviation Administration (FAA) issued a final rule to facilitate the safe development of civil supersonic aircraft. The rule streamlines and clarifies procedures to obtain FAA approval for supersonic flight testing in the United States. This rule will help ensure that companies developing these aircraft clearly understand the process for gaining FAA approval to conduct flight testing, which is a key step in ultimately bringing their products to market.

07/01/2021

## **BOEING CHARGED WITH 737 MAX FRAUD CONSPIRACY AND AGREES TO PAY OVER \$2.5 BILLION**

The Boeing Company has entered into an agreement with the Department of Justice to resolve a criminal charge related to a conspiracy to defraud the Federal Aviation Administration's Aircraft Evaluation Group (FAA AEG) in connection with the FAA AEG's evaluation of Boeing's 737 MAX airplane.

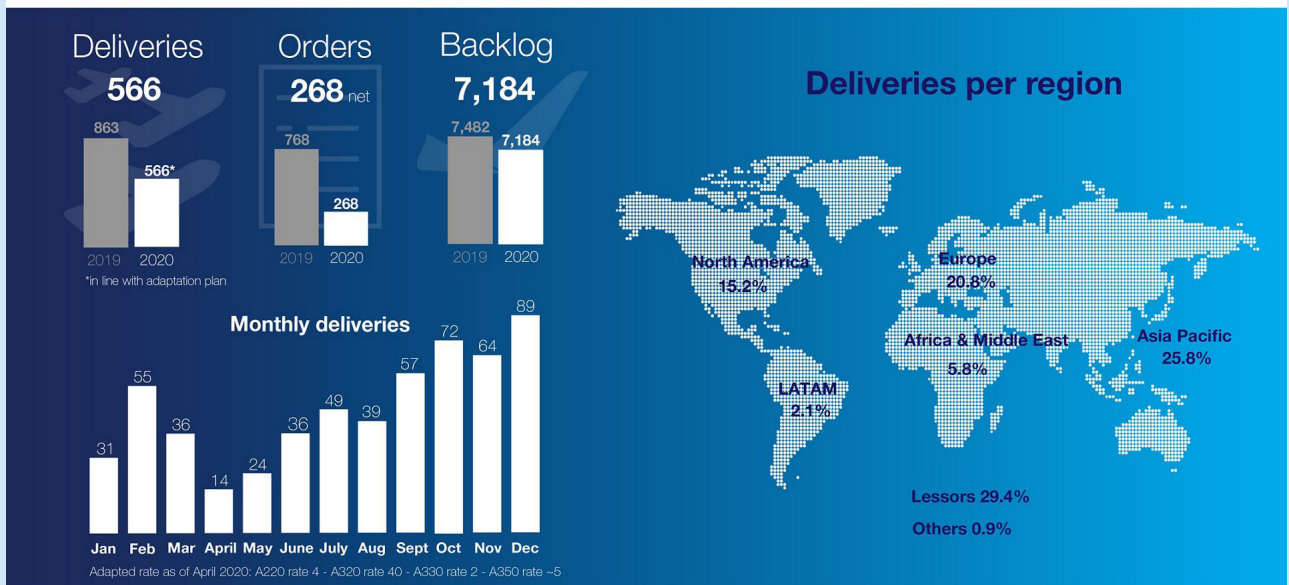
08/01/2021

**AIRBUS 2020 DELIVERIES DEMONSTRATE RESILIENCE**

Airbus SE delivered 566 commercial aircraft to 87 customers in 2020, in line with the production adaptation plan set out in April 2020 in response to the COVID-19 pandemic. In 2020, deliveries comprised:

	2020 (including)		2019 (including)	
A220 Family	38			48
A320 Family	446	(431 NEO)	642	(551 NEO)
A330 Family	19	(13 NEO)	53	(41 NEO)
A350 Family	59	(14 A350-1000)	112	(25 A350-1000)
A380	4		8	

Airbus Commercial Aircraft **Orders & Deliveries 2020**



**AIRBUS**

13/01/2021

**FEDERAL AVIATION ADMINISTRATION ADOPTS STRICTER UNRULY PASSENGER POLICY**

FAA Administrator Steve Dickson today signed an order directing a stricter legal enforcement policy against unruly airline passengers in the wake of recent, troubling incidents. The FAA has seen a disturbing increase in incidents where airline passengers have disrupted flights with threatening or violent behavior. These incidents have stemmed both from passengers’ refusals to wear masks and from recent violence at the U.S. Capitol.



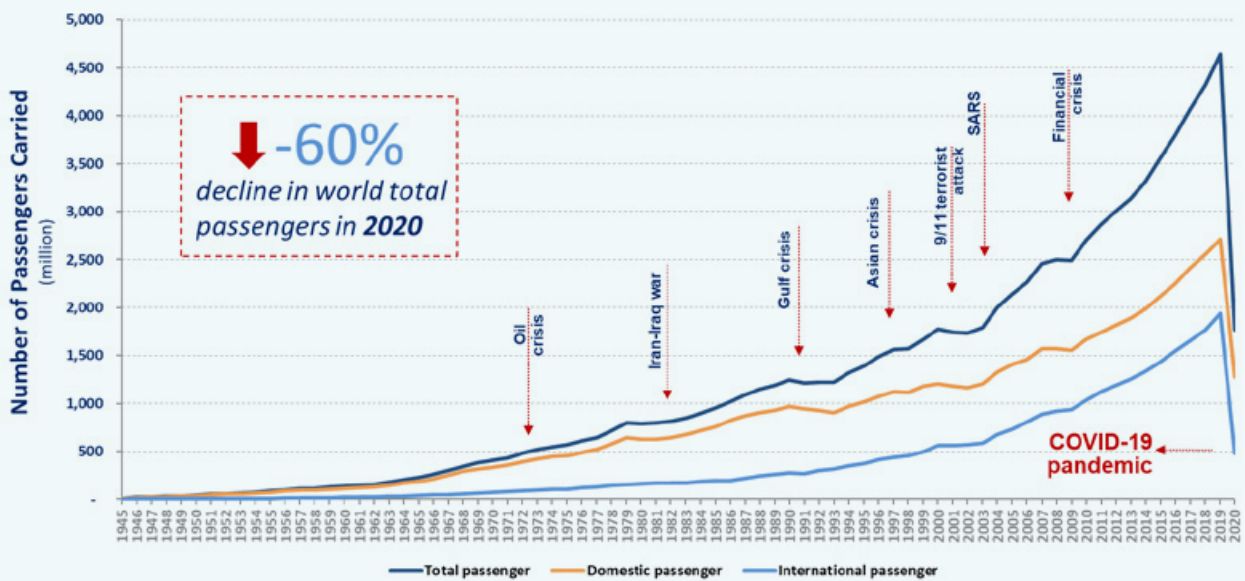
Source: US FAA

15/01/2021

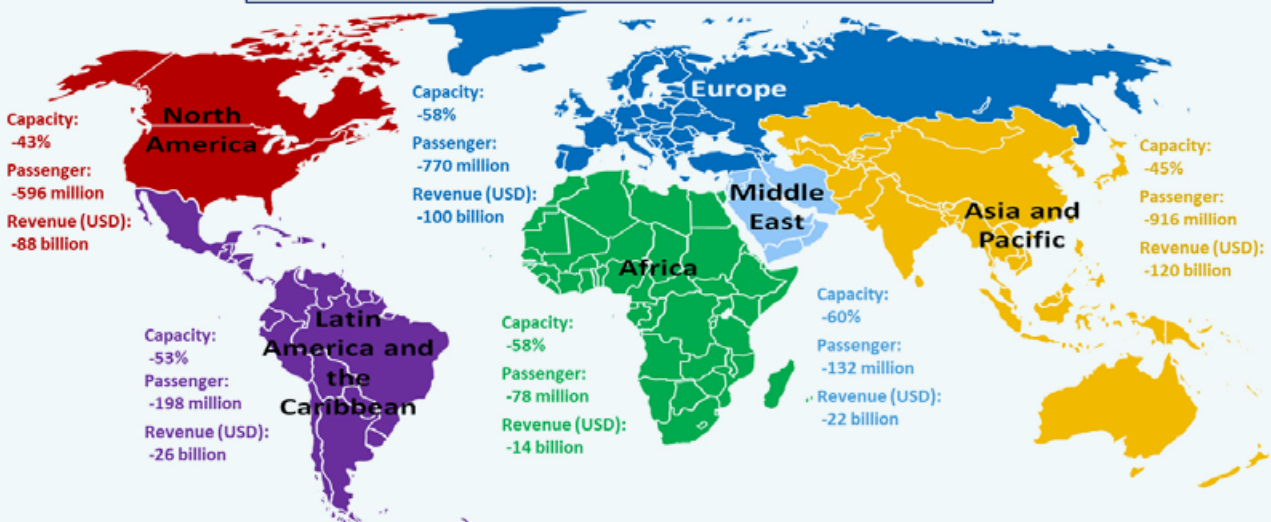
**2020 PASSENGER TOTALS DROP 60 PER CENT AS COVID-19 ASSAULT ON INTERNATIONAL MOBILITY CONTINUES**

With its latest economic impact analysis of COVID-19 now completed, ICAO has confirmed that international passenger traffic suffered a dramatic 60 per cent drop over 2020, bringing air travel totals back to 2003 levels. ICAO reports that as seat capacity fell by 50 per cent last year, passenger totals dropped by 60 per cent with just 1.8 billion passengers taking to the air during the first year of the pandemic, compared to 4.5 billion in 2019.

Its numbers also point to airline financial losses of 370 billion dollars resulting from the COVID-19 impacts, with airports and air navigation services providers (ANSPs) losing a further 115 billion and 13 billion, respectively.



<b>Global:</b>	<b>Capacity:</b> -50%	<b>Passenger:</b> -2.7 billion	<b>Revenue (USD):</b> -370 billion
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Source: ICAO

**27/01/2021****EASA declares Boeing 737 MAX safe to return to service in Europe**

The European Union Aviation Safety Agency (EASA) gave its seal of approval for the return to service of a modified version of the Boeing 737 MAX, mandating a package of software upgrades, electrical wiring rework, maintenance checks, operations manual updates and crew training which will allow the plane to fly safely in European skies after almost two years on the ground.

**28/01/2021****UNWTO - 2020: WORST YEAR IN TOURISM HISTORY WITH 1 BILLION FEWER INTERNATIONAL ARRIVALS**

Global tourism suffered its worst year on record in 2020, with international arrivals dropping by 74% according to the latest data from the World Tourism Organization (UNWTO). Destinations worldwide welcomed 1 billion fewer international arrivals in 2020 than in the previous year, due to an unprecedented fall in demand and widespread travel restrictions. This compares with the 4% decline recorded during the 2009 global economic crisis.

**01/02/2021****AVIATION: A NEW STEP TOWARDS MODERNISING AND GREENING THE EUROPEAN SKIES**

Today, the European Commission adopted a regulation that establishes the Common Project One (CP1) in support of the single European sky – a new framework that contributes to making flying in the European skies more sustainable by ensuring a more efficient management of airways. Following an intense pilot phase of implementing new technological and operational air traffic management (ATM) solutions developed under the SESAR project dealing with Single European Sky ATM Research, CP1 focuses on the most efficient solutions and sets a realistic implementation timeline to be respected by the concerned parties: airlines, airports and air navigation service providers.

These solutions are grouped into six functionalities that introduce a higher degree of digitalisation and interoperability for civil and military airspace users, airports and air navigation service providers. More efficient flight trajectories supported by these innovative technologies will also allow modern aircraft to exploit fully their greener and quieter technologies. The new solutions will ensure more direct and therefore more fuel efficient flight paths.



03/02/2021

**PETE BUTTIGIEG WAS SWORN AS THE U.S. SECRETARY OF TRANSPORTATION**

Pete Buttigieg currently serves as the 19th Secretary of Transportation, having been sworn in on February 3, 2021.

Prior to joining the Biden-Harris Administration, Secretary Buttigieg served two terms as mayor of his hometown of South Bend, Indiana. A graduate of Harvard University and a Rhodes Scholar at Oxford, Buttigieg served for seven years as an officer in the U.S. Navy Reserve, taking a leave of absence from the mayor's office for a deployment to Afghanistan in 2014.

In 2019, he launched his historic campaign for president. Throughout 2020, he campaigned for the election of the Biden-Harris ticket and served on the advisory board for the presidential transition. In December, he was nominated by President-elect Biden to be Secretary of Transportation. He was confirmed by the Senate on February 2, 2021, becoming the first openly gay person confirmed to serve in a president's Cabinet.



Source: US DOT

03/02/2021

**IATA: 2020 WORST YEAR FOR AIR CARGO DEMAND SINCE PERFORMANCE MONITORING BEGAN IN 1990**

The International Air Transport Association (IATA) released data for global air freight markets showing that demand for air cargo decreased by 10.6% in 2020, compared to 2019. This was the largest drop in year-on-year demand since IATA started to monitor cargo performance in 1990, outpacing the 6% fall in global trade in goods.

- Global demand in 2020, measured in cargo tonne-kilometers (CTKs\*), was 10.6% below 2019 levels (-11.8% for international operations).
- Global capacity, measured in available cargo tonne-kilometers (ACTKs), shrank by 23.3% in 2020 (-24.1% for international operations) compared to 2019. This was more than double the contraction in demand.
- Due to the lack of available capacity, cargo load factors rose 7.7% in 2020. This contributed to increased yields and revenues, providing support to airlines and some long-haul passenger services in the face of collapsed passenger revenues.
- Improvements towards yearend were demonstrated in December when global demand was 0.5% below previous-year levels (-2.3% for international operations). Global capacity was 17.7% below previous-year levels (-20.6% for international operations). That is much deeper than the contraction in demand, indicating the continuing and severe capacity crunch. With the stalling of the recovery in passenger markets, there is no end in sight for the capacity crunch.



**03/02/2021****IATA: 2020 WORST YEAR IN HISTORY FOR AIR TRAVEL DEMAND**

The International Air Transport Association (IATA) announced full-year global passenger traffic results for 2020 showing that demand (revenue passenger kilometers or RPKs) fell by 65.9% compared to the full year of 2019, by far the sharpest traffic decline in aviation history. Furthermore, forward bookings have been falling sharply since late December.

- International passenger demand in 2020 was 75.6% below 2019 levels. Capacity, (measured in available seat kilometers or ASKs) declined 68.1% and load factor fell 19.2 percentage points to 62.8%.
- Domestic demand in 2020 was down 48.8% compared to 2019. Capacity contracted by 35.7% and load factor dropped 17 percentage points to 66.6%.
- December 2020 total traffic was 69.7% below the same month in 2019, little improved from the 70.4% contraction in November. Capacity was down 56.7% and load factor fell 24.6 percentage points to 57.5%.
- Bookings for future travel made in January 2021 were down 70% compared to a year-ago, putting further pressure on airline cash positions and potentially impacting the timing of the expected recovery.
- IATA's baseline forecast for 2021 is for a 50.4% improvement on 2020 demand that would bring the industry to 50.6% of 2019 levels. While this view remains unchanged, there is a severe downside risk if more severe travel restrictions in response to new variants persist. Should such a scenario materialize, demand improvement could be limited to just 13% over 2020 levels, leaving the industry at 38% of 2019 levels.

**05/02/2021****ACI WORLD WELCOMES AIRPORT INDUSTRY CLIMATE ACTION AMID COVID-19**

Airports Council International (ACI) World has today welcomed the new Airport Carbon Accreditation Interim Report 2019-2020 which reveals the latest results of and developments in the global carbon standard for airports.

The Report reveals robust participation growth across all regions, illustrating the extent of airport industry's readiness to decarbonise even in the toughest of conditions.

Since the start of the COVID-19 outbreak, 34 airports have become accredited for the first time and another 31 have progressed to a higher level of the programme. This trend is set to continue in 2021, driven by the enduring leadership of airports in CO<sub>2</sub> management and reduction.

As the financial situation of airports across the world deteriorates rapidly, however, the necessary investments to cut carbon are weighed against survival. This will be a factor of concern for further decarbonisation in the sector and should be considered as one of the grounds for urgent government aid.

**08/02/2021****ACI WORLD LAUNCHES VOICE OF THE CUSTOMER RECOGNITION**

In 2020, ACI introduced a new form of recognition – separate from the ASQ Awards – called “The Voice of the Customer”.

This is given to airports which demonstrated significant efforts in gathering passenger feedback through the Airport Service Quality (ASQ) Departures survey, to help them better understand their customers during the pandemic.

To qualify, an airport member must have collected 3 or more quarters of data.

This year, 140 airports have been recognized around the world.



08/02/2021

**WORLD FIRST IN THE NETHERLANDS BY KLM, SHELL AND DUTCH MINISTRY FOR INFRASTRUCTURE AND WATER MANAGEMENT: FIRST PASSENGER FLIGHT PERFORMED WITH SUSTAINABLE SYNTHETIC KEROSENE**

For the first time worldwide, a passenger flight partly flown on sustainably produced synthetic kerosene, was carried out in The Netherlands. This was announced today during the international conference on Synthetic Sustainable Aviation Fuels (SAF) in The Hague. Shell, producer of the sustainable kerosene and KLM, operating the flight, presented this showcase during the meeting initiated by Cora van Nieuwenhuizen, Dutch Minister for Infrastructure and Water Management. European politicians, policymakers, representatives from the business community, the (aviation) industry and NGOs participated at the conference.



09/02/2021

**EUROCAE & EUROCONTROL STRENGTHEN COOPERATION IN AVIATION STANDARDS DEVELOPMENT**

Today, the Director General of EUROCONTROL, Eamonn Brennan, and the Secretary General of EUROCAE, Christian Schleifer, concluded a new Memorandum of Cooperation (MoC) between the two organisations at a virtual meeting in the presence of the EUROCAE President and Council Chair, Bruno Ayrat, Thales LAS France. The new MoC builds on and strengthens decades of cooperation between EUROCAE and EUROCONTROL – Europe's leading developers of aviation standards. It provides for greater mutual recognition of the role played by each organisation in the field of standards and contributes to greater complementarity between the two.



10/02/2021

**ETIHAD AIRWAYS IS THE FIRST AIRLINE IN THE WORLD WITH 100% OF CREW ON BOARD VACCINATED**


Etihaad Airways, the national airline of the United Arab Emirates, has become the first airline in the world with all its operating pilots and cabin crew vaccinated to help curb the spread of COVID-19 and give passengers who travel with the airline peace of mind. This achievement was made possible through Etihad's 'Protected Together' employee vaccination initiative which was formally launched in January this year. Building on the UAE's Choose to Vaccinate campaign, Protected Together is about helping staff take proactive, personal steps towards protecting themselves against COVID-19.



10/02/2021

**UNITED TO WORK WITH ARCHER AVIATION TO ACCELERATE PRODUCTION OF ADVANCED, SHORT-HAUL ELECTRIC AIRCRAFT**

United Airlines today announced that it has completed an agreement to work with air mobility company Archer as part of the airline's broader effort to invest in emerging technologies that decarbonize air travel. Rather than relying on traditional combustion engines, Archer's electric vertical takeoff and landing (eVTOL) aircraft are designed to use electric motors and have the potential for future use as an 'air taxi' in urban markets. Under the terms of the agreement, United will contribute its expertise in airspace management to assist Archer with the development of battery-powered, short-haul aircraft. Once the aircraft are in operation and have met United's operating and business requirements, United, together with Mesa Airlines, would acquire a fleet of up to 200 of these electric aircraft that would be operated by a partner and are expected to give customers a quick, economical and low-carbon way to get to United's hub airports and commute in dense urban environments within the next five years.

**UNITED** A STAR ALLIANCE MEMBER 

11/02/2021

**EUROPE'S AVIATION SECTOR TODAY UNVEILED ITS FLAGSHIP SUSTAINABILITY INITIATIVE, DESTINATION 2050 – A ROUTE TO NET ZERO EUROPEAN AVIATION**

Europe's aviation sector today unveiled its flagship sustainability initiative, Destination 2050 – A Route to Net Zero European Aviation. Driven by a new, independent report, it provides a vision and path for meaningful CO<sub>2</sub> emission reduction efforts in Europe and globally.



This follows recent climate commitments announced by the sector last November in the Round Table Report on the Recovery of European Aviation which called upon institutional stakeholders to join the sector in an EU Pact for Sustainable Aviation by the end of 2021 – a call reiterated today. Building on the Paris Agreement and the European Green Deal, Destination 2050 sees all flights within and departing the EU, UK and EFTA realising net zero CO<sub>2</sub> emissions by 2050. The ambitious plan and related commitments laid out by Europe's airlines, airports, aerospace manufacturers and air navigation service providers shows collective leadership of the European aviation sector to reduce CO<sub>2</sub> emissions, with the goal of making leisure and business air travel in Europe, and globally, more sustainable in the long term. According to the report, there is an opportunity to reach net zero CO<sub>2</sub> emissions by 2050 through a combination of four key measures, aligning European aviation with EU climate goals – subject to securing the required supporting policy and financing framework at EU and national level. These four measures include:

- Improvements in aircraft and engine technologies could achieve emission reductions of 37%
- Using sustainable aviation fuels (SAFs) could achieve emission reductions of 34%
- Implementing economic measures could achieve emission reductions of 8%
- Improvements in air traffic management (ATM) and aircraft operations could achieve emission reductions of 6%

The Destination 2050 report further assumes an impact on demand due to the above measures, resulting in the net zero CO<sub>2</sub> goal. Nevertheless, European air passenger numbers are projected to grow on average by approximately 1.4% per year between 2018 and 2050 without compromising the sector's ability to reach net zero CO<sub>2</sub> emissions by this point.

Destination 2050 highlights that to make the net zero vision for European aviation by 2050 a reality, while maintaining international competitiveness and aviation's benefits to society – quick, decisive joint actions by governments and industry will be needed. Industry will need to continue to substantially invest in decarbonisation and innovation and make the necessary operational transitions, while governments will need to ensure a level playing field and facilitate the transition through incentives and by reducing investment risks with consistent and stable policy frameworks.

This is the first pan-European, industry-wide, long-term vision that comes with concrete solutions to the complex challenge of reducing CO<sub>2</sub> emissions from commercial flights within and departing the EU, UK and EFTA. The initiative is led by five European aviation associations – Airports Council International Europe (ACI EUROPE), AeroSpace and Defence Industries Association of Europe (ASD Europe), Airlines for Europe (A4E), Civil Air Navigation Services Organisation (CANSO) and European Regions Airline Association (ERA). The report was made possible thanks to the work of the Royal Netherlands Aerospace Centre (NLR) and SEO Amsterdam Economics.

**12/02/2021****U.S. DEPARTMENT OF TRANSPORTATION ANNOUNCES NEARLY \$2 BILLION GRANT PROGRAM FOR COVID RELIEF TO AIRPORTS**

The program is funded under the Coronavirus Response and Relief Supplemental Appropriations Act of 2020. It is available to more than 3,000 commercial service, reliever and publically owned general-aviation airports in the National Plan of Integrated Airport Systems.

Most of the funds will go toward helping keep people safe and in jobs by reimbursing operational expenses, debt service payments and costs related to combating the spread of pathogens at the airport. The program also includes money for rent relief to airport concessions and to support FAA contract towers for items such as cleaning and sanitizing facilities affected by COVID-19 cases.

**19/02/2021****IATA'S CHIEF ECONOMIST TO RETIRE**

The International Air Transport Association (IATA) announced that its Chief Economist, Brian Pearce, will retire from the organization in July 2021.

Pearce joined IATA in 2004. Since then he has built IATA's evidence-based economic analysis capabilities into the most authoritative source of insight on aviation's global performance. He also serves on the Association's Strategic Leadership team.



Source: IATA

**22/02/2021****ICAO AND WCO ISSUE JOINT CALLS ON VACCINE SUPPLY CHAIN PRIORITIES, NEW CUSTOMS AND SECURITY GUIDELINES**

ICAO and the World Customs Organization (WCO) have published a joint statement calling on governments to demonstrate maximum flexibility with respect to border clearance and air transport supply chain operations essential to the effective distribution of COVID-19 vaccines and related medical supplies.

In a separate but related development, the two agencies have also developed new guidelines to help countries achieve better alignment of their customs and security procedures.

Signed by ICAO Secretary General Dr. Fang Liu and WCO Secretary General Dr. Kunio Mikuriya, the joint statement on vaccines urges the rapid establishment of the infrastructure needed to support end-to-end vaccine storage and logistics for public supplies.

**24/02/2021****IATA: COVID-19 CASH BURN CONTINUES - URGENT PREPARATIONS FOR RESTART**

The International Air Transport Association (IATA) released new analysis showing that the airline industry is expected to remain cash negative throughout 2021. Previous analysis (November 2020) indicated that airlines would turn cash positive in the fourth quarter of 2021. At the industry level, airlines are now not expected to be cash positive until 2022. Estimates for cash burn in 2021 have ballooned to the \$75 billion to \$95 billion range from a previously anticipated \$48 billion. The following factors play into this estimate:

- **Weak Start for 2021:** It is already clear that the first half of 2021 will be worse than earlier anticipated. This is because governments have tightened travel restrictions in response to new COVID-19 variants. Forward bookings for summer (July-August) are currently 78% below levels in February 2019 (comparisons to 2020 are distorted owing to COVID-19 impacts).

24/02/2021

**IATA: COVID-19 CASH BURN CONTINUES – URGENT PREPARATIONS FOR RESTART**

- **Optimistic Scenario:** From this lower starting point for the year, an optimistic scenario would see travel restrictions gradually lifted once the vulnerable populations in developed economies have been vaccinated, but only in time to facilitate tepid demand over the peak summer travel season in the northern hemisphere. In this case 2021 demand would be 38% of 2019 levels. Airlines would burn through \$75 billion of cash over the year. But cash burn of \$7 billion in the fourth quarter would be significantly improved from an anticipated \$33 billion cash burn in the first quarter.
- **Pessimistic Scenario:** This scenario would see airlines burn through \$95 billion over the year. There would be an improving trend from a \$33 billion cash burn in the first quarter reducing to \$16 billion in the fourth quarter. The driver of this scenario would be governments retaining significant travel restrictions through the peak northern summer travel season. In this case, 2021 demand would only be 33% of 2019 levels.

25/02/2021

**JOINT STATEMENT BY TRANSPORT CANADA AND THE U.S. DEPARTMENT OF TRANSPORTATION ON THE NEXUS BETWEEN TRANSPORTATION AND CLIMATE CHANGE**

Recognizing the transport sector constitutes one of the largest sources of greenhouse gas emissions for both nations, and in light of the integrated nature of our transportation sectors, Secretary Buttigieg and Minister Alghabra committed to reinvigorate our bilateral cooperation to fight climate change and limit the environmental impacts from our transportation networks—on land, air and sea.

In support of the Roadmap for a Renewed U.S.-Canada Partnership, announced by President Biden and Prime Minister Trudeau and our bilateral Memorandum of Cooperation on “Transport Matters of Mutual Interest,” signed in 2016, we will work together to accelerate policy actions that help our transport sectors grapple effectively with the climate challenge. A healthy environment and economy support the goals of both countries to ‘build back better’ from the COVID-19 pandemic, and leverage actions at the state, provincial, territorial and local levels.

On roads, together with other federal departments and agencies, we aim toward a zero-emission vehicle future through ambitious vehicle standards to improve fuel efficiency and reduce greenhouse gases from light-duty and heavy-duty vehicles. We intend to work together to help accelerate the achievement of 100% zero-emission vehicle sales for light-duty vehicles and increase the supply of and demand for zero-emission medium — and heavy-duty vehicles.

We plan to explore best practices on how to help incentivize the installation of electric charging stations, and refuelling stations for clean fuels, includ-

ing through the ongoing coordination of electric and alternative fuel corridors and the alignment of technical codes, standards and regulations, to enable the seamless transportation of people and goods. We also plan to work collaboratively on new innovative solutions to decrease emissions and to advance the use of cleaner fuels in rail transportation.

On aviation, we are committed to working together on a shared vision toward reducing the sector’s emissions in a manner consistent with the goal of net zero emissions for our economies by 2050, and on robust standards that integrate climate protection and safety. We intend to advance the development and deployment of high integrity sustainable aviation fuels and other clean technologies that meet rigorous international standards, building on existing partnerships, such as through ASCENT — the Aviation Sustainability Center — and pursue policies to increase the supply and demand of sustainable aviation fuels.

We are committed to partnering in key international forums, including the International Civil Aviation Organization (ICAO) and the International Maritime Organization (IMO). In ICAO, we will engage in processes to advance a new long-term aspirational goal in line with our vision for decarbonizing the aviation sector, and continue to participate in the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA). At the IMO, to reduce emissions from ships, we plan to work towards achieving the ambition reflected in the Initial IMO Strategy on reduction

*(cont.’d ►)*

25/02/2021

**JOINT STATEMENT BY TRANSPORT CANADA AND THE U.S. DEPARTMENT OF TRANSPORTATION ON THE NEXUS BETWEEN TRANSPORTATION AND CLIMATE CHANGE**

►cont'd

of GHG emissions to halve emissions from ships by 2050 compared to 2008 levels.

We will continue to support the development of green transport infrastructure along the border, including in our management of the Great Lakes and St. Lawrence Seaway for maritime navigation. We will work to advance cleaner, sustainable and renewable fuels for shipping. We are dedicated to working with the IMO to effectively implement the ban on the use and carriage of heavy fuel oil (HFO) as fuel in the Arctic. We also look forward to exploring how we might ad-

dress and support the transportation infrastructure needs of Arctic and Northern communities, such as safety, climate change, and fostering socio-economic opportunities.

This new focus on climate will reinforce our already vast cooperation portfolio across all modes of transportation to ensure safe, secure, and efficient transportation networks of today, while preparing for the innovations of tomorrow, and recovering our economies in a way that promotes employment, sustainability and equity.

01/03/2021

**ICAO COUNCIL MAKES PROGRESS ON NEW REMOTELY PILOTED AIRCRAFT SYSTEM (RPAS) STANDARDS**

During its ongoing 222nd Session, the ICAO Council today adopted new and amended Standards and Recommended Practices (SARPs) driving important progress on the international safety and interoperability of re-

motely piloted aircraft systems (RPAS).

The new provisions will become effective on 12 July 2021, and applicable as of 26 November 2026. The most important pertain to Annex 8 — Airworthiness

of Aircraft to the Chicago Convention, and cover certification requirements for remotely piloted aeroplanes and helicopters, in addition to the remote pilot stations (RPS) they are operated from.



03/03/2021

**RYANAIR JOINS AMBITIOUS 'FUELLING FLIGHT INITIATIVE' IN ITS PLEDGE TO SUPPORT SUSTAINABLE AVIATION FUELS FOR A CARBON NEUTRAL FUTURE**

Ryanair today announced it has joined the ambitious "Fuelling Flight Initiative" in its commitment to supporting Sustainable Aviation Fuels (SAFs) as an essential element to achieve net-zero carbon emissions in the aviation industry.

This ambitious initiative provides recommendations on the sustainability aspects of the EU's policy design to support SAFs. Together with environmental groups, fellow airlines and research organisations, the group convenes to reach consensus on the necessary policies for the transition towards carbon neutral flying.



**05/03/2021****ICAO TO PARTNER WITH ACI, IATA AND CANSO ON NEW RUNWAY SAFETY TRAINING INITIATIVE**

With the coming into effect this November of its new Global Reporting Format for Runway Surface Conditions (GRF), ICAO has agreed to partner with the International Air Transport Association (IATA) and the Civil Air Navigation Services Organisation (CANSO) on a new joint GRF training programme.

The new online course has been specifically designed for air traffic controllers and aeronautical information service staff, and will be available for enrolment in April of this year on the ICAO Global Aviation Training website. It complements existing courses developed in cooperation with Airports Council International (ACI) for airport operations staff, and with IATA for flight crews.

**08/03/2021****ICAO COUNCIL MARKS #IWD 2021 WITH CONCRETE COMMITMENTS ON GENDER EQUALITY**

On the occasion of International Women's Day (IWD2021), the 36 State ICAO governing Council has adopted concrete commitments in a new Declaration on Improving Gender Representation in ICAO's Governing and Technical Bodies.

The new commitments include that all future ICAO Council committees, working groups, panels, and other governance or technical bodies, as well as their Chair Groups where applicable and the Council's own Vice-President co-

hort, must be comprised of both men and women.

Other commitments included protecting ICAO policies and standards from gender discriminatory language, promoting gender neutral language for its own communications, and working to increase the number of women having access to Council level responsibilities.

The new Declaration also noted that #IWD2021 would mark the start of new Council advocacy efforts at the global, regional and



ICAO

national levels, and called on all of ICAO's 193 Member States to systematically promote the role of women in aviation, and to give due regard and equal opportunity to the nomination of qualified female candidates when nominating Representatives and other experts and officials to ICAO bodies and groups.

**08/03/2021****EASA ISSUES GUIDELINES FOR MANAGEMENT OF DRONE INCIDENTS AT AIRPORTS**

The European Union Aviation Safety Agency (EASA) published guidance to help aviation operators and national authorities manage drone incidents near airports, a response to a number of recent events which have disrupted Europe's air traffic at considerable expense to aviation operators, bringing inconvenience for passengers and posing a potential safety threat.

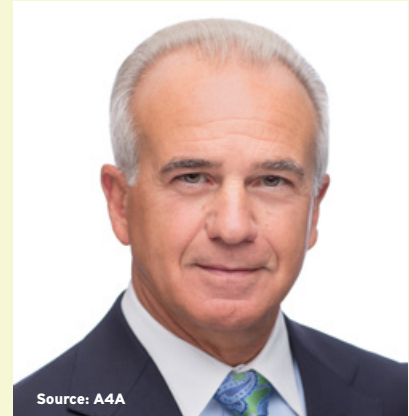
EASA's "Drone Incident Management at Aerodromes" manual addresses unauthorised drone usage in the vicinity of airports. Such incidents may occur by accident -- when individuals are simply not aware of the problems their actions may create -- or due to individuals acting with deliberate intent to disrupt, such as activists. At the extreme, the actions may have criminal or terrorist motivation.

The manual includes guidance on how to ascertain whether a criminal offence has been committed, developed with input from law enforcement authorities.

10/03/2021

**STATEMENT FROM A4A CEO AND PRESIDENT NICHOLAS E. CALIO ON THE PASSAGE OF THE AMERICAN RESCUE PLAN**

On behalf of our member carriers, Airlines for America (A4A) applauds the U.S. Congress for passing the American Rescue Plan (ARP), which includes provisions to extend the highly successful Payroll Support Program (PSP) that has been vital to preserving the jobs of the U.S. airline industry’s hardworking employees – flight attendants, pilots, mechanics, gate agents and others. We are deeply appreciative of Congress’ continued support of our employees, who are our industry’s greatest resource and a critical component of the overall U.S. economic recovery.



Source: A4A

11/03/2021

**NGOS AND AVIATION SECTOR CALL FOR LONG-HAUL EMISSIONS TO BE COVERED BY EU’S SUSTAINABLE AVIATION FUELS MANDATE**

In a letter, sent to Vice-President Frans Timmermans and Transport Commissioner Adina Violean, the coalition point out that long-haul operations are the primary source of the sector’s climate impact. According to recent Eurocontrol figures, just 6% of flights, those over 4000km in length, create half of aviation’s CO<sub>2</sub> emissions. Eurocontrol concludes: “Increasing the supply of sustainable aviation fuel to cover just 10% of the needs of long-haul, would do more than can ever be done in short-haul to reduce net CO<sub>2</sub> emissions”. \* Moreover, extra-EEA flights and long-haul hub operations are already excluded from many European environmental policies such as the Emissions Trading Scheme (ETS). For short-haul flying, SAFs are only an interim step, similar to offsetting, until zero-emissions technologies, such as hydrogen or electric propulsion aircraft, will be available by the mid to late-2030s.

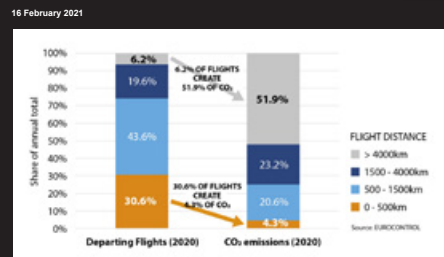
These new, zero-emissions technologies, however, are not available for long-haul aviation in the foreseeable future, therefore SAFs continue to be key for long-haul aviation to mitigate its carbon emissions.

In addition, by potentially raising costs, SAFs could detract from ongoing efforts by technology manufacturers and short-haul carriers to switch to cleaner, zero-emissions solutions. The signatories therefore call on the European Commission to ensure the SAFs mandate does not delay the development of zero-emission propulsion (i.e. hydrogen or electric).

In addition, the European Commission needs to exclude biofuels from dedicated cropland\*\* and ensure

**EUROCONTROL Data Snapshot**

Half of CO<sub>2</sub> emissions come from just 6% of flights: the long-haul ones.



For some routes, only aviation can provide a timely connection. This is true for some shorter hops, over water or where a land connection is difficult, but mostly this is a question of distance. In 2020, some 6% of flights from European airports were clearly long-haul, crossing more than 4000km.

For passengers and for urgent or high-value cargo, there is little or no alternative on such routes. The importance of long-haul is even more clear when measured in capacity, rather than flights. For example, on the passenger side these 6% of flights carry 10% of total seats, and more than 40% of seat-kilometres (the usual measure of passenger capacity in the industry).

The chart shows, however, that there is an environmental cost. Longer distances naturally mean longer duration flights, and mostly by larger aircraft (hence the higher proportion of seats). That has a significant cost in terms of CO<sub>2</sub>. In 2020, more than half of European aviation’s CO<sub>2</sub> emissions were from this tiny proportion of the overall number of flights. We have mentioned in other data snapshots how COVID-19 has affected the mix of longer- and shorter-haul flights. But this domination of emissions by a few longer-haul flights is not COVID-related: in 2019, the 6% that were long-haul had a 48% share of CO<sub>2</sub>, very similar to 2020.

At the opposite end of the scale, the 31% of flights under 500km had only a 4% share of CO<sub>2</sub> (24% of flights with 3.8% of CO<sub>2</sub> in 2019). Short-haul is an excellent candidate for early electrification, amongst other initiatives, to reduce its environmental impact. These improvements will be needed, if aviation is to meet its sustainability targets. However, these data show that the maximum possible saving in short-haul is about 4% of the total CO<sub>2</sub>. Increasing the supply of sustainable aviation fuel to cover just 10% of the needs of long-haul, would do more than can ever be done in short-haul to reduce net CO<sub>2</sub> emissions.

Technical Note: The statistics shown are for departures from airports in the 40 European States which participate in the EUROCONTROL Central Booking Process zone. Seats and seat-km data are from 2019. For this illustration we assume sustainable aviation fuel saves 75-80% of CO<sub>2</sub> compared to kerosene.

SUPPORTING EUROPEAN AVIATION



that advanced biofuels are sustainable and mandates for best-in-class fuels, such as synthetic kerosene, are included.

**12/03/2021****ICAO COUNCIL APPROVES NEW PANDEMIC RESPONSE AND RECOVERY MEASURES**

The ICAO Council approved six new COVID-19 recommendations today, and amended two others, as countries continue to address latest information and cooperate to optimize the role of international air transport in global pandemic recovery and ensure the speedy resumption of air travel.

The new and amended recommendations and updated guidelines are contained in the High-Level Cover Document and "Take-off" Guidelines issued by the Council's Aviation Recovery Task Force (CART), established shortly after the pandemic was identified by the World Health Organization (WHO).



ICAO

**16/03/2021****ACI WORLD UPDATES GUIDANCE ON RESTART AND RECOVERY FOR AIRPORTS**

Airports Council International (ACI) World has today published new guidance for airports to help them prepare for restart and recovery from the COVID-19 pandemic and its impact on their operations.

As the trajectory of recovery has been affected by new variants of COVID-19 and the new restrictions introduced by governments in response, the second edition of ACI World's Aviation Operations during COVID-19 – Business Restart and Recovery, provides updated best practice examples and guidance for both initial restart and longer-term recovery. ACI has not only updated its guidance on the practical and efficient health and operational measures that can be introduced to support safe travel, but also included new information on the provision of COVID-19 testing facilities at airports and supporting the distribution of vaccines.

**AIRPORTS COUNCIL INTERNATIONAL****17/03/2021****EUROPEAN COMMISSION PROPOSES A DIGITAL GREEN CERTIFICATE**

Today the European Commission is proposing to create a Digital Green Certificate to facilitate safe free movement inside the EU during the COVID-19 pandemic. The Digital Green Certificate will be a proof that a person has been vaccinated against COVID-19, received a negative test result or recovered from COVID-19. It will be available, free of charge, in digital or paper format. It will include a QR code to ensure security and authenticity of the certificate. The Commission will build a gateway to ensure all certificates can be verified across the EU, and support Member States in the technical implementation of certificates. Member States remain responsible to decide which public health restrictions can be waived for travellers but will have to apply such waivers in the same way to travellers holding a Digital Green Certificate.

**17/03/2021****IATA TRAVEL PASS SUCCESSFULLY TRIALED ON FIRST INTERNATIONAL FLIGHT**

The International Air Transport Association (IATA) announced the arrival at London's Heathrow Airport of the first traveler using the IATA Travel Pass app to manage their travel health credentials. Passengers on Singapore Airlines flights from Singapore to London during the trial could use IATA Travel Pass to:

- Create a secure digital version of their passport on their mobile device
- Input their flight details to learn of travel restrictions and requirements
- Receive verified test results and a confirmation that they meet all travel requirements.



18/03/2021

**AVIATION LEADERS LAUNCH FIRST IN-FLIGHT 100% SUSTAINABLE AVIATION FUEL EMISSIONS STUDY ON COMMERCIAL PASSENGER JET**

A team of aerospace specialists has launched the world's first in-flight emissions study using 100% sustainable aviation fuel (SAF) on a wide-body commercial passenger aircraft.

Airbus, German research centre DLR, Rolls-Royce and SAF producer Neste have teamed up to start the pioneering 'Emission and Climate Impact of Alternative Fuels' (ECLIF3) project looking into the effects of 100% SAF on aircraft emissions and performance.

Findings from the study - to be carried out on the ground and in the air using an Airbus A350-900 aircraft powered by Rolls-Royce Trent XWB engines - will support efforts currently underway at Airbus and Rolls-Royce to ensure the aviation sector is ready for the large-scale use of SAF as part of the wider initiative to decarbonise the industry.

Fuel-clearance engine tests, including a first flight to check operational compatibility of using 100% SAF with the aircraft's systems, started at Airbus' facilities in Toulouse, France, this week. These will be followed by the ground-breaking flight-emissions tests due to start in April and resuming in the Autumn, using DLR's Falcon 20-E 'chase plane' to carry out measurements to investigate the emissions impact of using SAF. Meanwhile, further ground tests measuring particulate-matter emissions are set to indicate the environmental impact of SAF-use on airport operations.

Both the flight and the ground tests will compare emissions from the use of 100% SAF produced with HEFA (hydroprocessed esters and fatty acids) technology against those from fossil kerosene and low-sulphur fossil kerosene.



Source: Airbus

22/03/2021

**ICAO COUNCIL CONCLUDES 222ND SESSION WITH IMPORTANT NEW PROGRESS FOR INTERNATIONAL AVIATION**

The ICAO Council concluded the meetings of its 222nd Session, formalizing important progress on air transport developments relating to ongoing global pandemic response, emissions offsetting, gender equality and remotely-

piloted aircraft systems (RPAS), among others.

The Council's contributions to the continuing work to help countries respond and recover from the pandemic on an aligned, effective basis globally, came with its adop-

tion of the latest 'Phase III' guidance of its Aviation Recovery Task Force (CART), and the decision to convene a ministerial conference on COVID-19 this coming October.

► *cont'd*

**22/03/2021****ICAO COUNCIL CONCLUDES 222ND SESSION WITH IMPORTANT NEW PROGRESS FOR INTERNATIONAL AVIATION** (*cont.'d* ▶)

Where sustainability and the environment are concerned, the Council agreed on additional CORSIA eligible emissions units programmes for use in CORSIA and on additional new criteria for the assessment of sustainability of aviation fuels to be eligible for use in the next phase of CORSIA. The Council also launched the first periodic CORSIA Review that will recommend possible improvements and adjustments to the implementation of the CORSIA scheme for consideration at the 41st ICAO Assembly scheduled for 2022.

Other important progress was made on new amendments to the annexes to the Chicago Convention supporting the integration of remotely-piloted aircraft systems into the international air transport regulatory framework, the approval of a new structure for ICAO Cybersecurity activities, the adoption of a new Declaration on gender equality in ICAO's technical and governing bodies, and in the inaugural meeting of the Council's new industry consultative body.

The 222nd Session also witnessed the Council's election and appointment of Mr Juan Carlos Salazar as ICAO's new Secretary General beginning in August this year, at which time he will replace Dr. Fang Liu of China.

**24/03/2021****IATA LAUNCHES EPIC TO ENHANCE DIGITAL COLLABORATION ACROSS THE AIR CARGO INDUSTRY**

The International Air Transport Association (IATA) today announced the launch of the IATA Enhanced Partner Identification and Connectivity (EPIC) platform to support the digitization of the global air cargo supply chain. EPIC simplifies the complex process of making digital connections across the air cargo value chain including enabling the efficient exchange of critical information such as messaging capabilities and identities.



Source: IATA

**24/03/2021****ICAO APPROVES NEW EDITION OF ITS TESTING AND CROSS-BORDER RISK MANAGEMENT MEASURES MANUAL**

ICAO has announced the release of the revised second edition of the UN aviation agency's Testing and Cross-border Risk Management Measures Manual.

Approved last week by ICAO Secretary General Dr. Fang Liu, the manual is fundamental to the effective global alignment of countries' pandemic response and recovery efforts, and provides national governments and air transport operators with important updates on wide ranging pandemic response and recovery priorities relating to civil aviation and public health measures.

**25/03/2021****EUROCONTROL MUAC OPTIMISES AIRSPACE SECTORS TO DRAW FULL BENEFIT FROM FREE ROUTE AIRSPACE**

On the AIRAC date 25 March 2021, EUROCONTROL's Maastricht Upper Area Control Centre (MUAC) successfully implemented a major overhaul of its airspace sector layout, which now better meets the European concept of free route airspace. The new airspace sector organisation is designed to better support higher traffic levels as soon as commercial schedules resume.

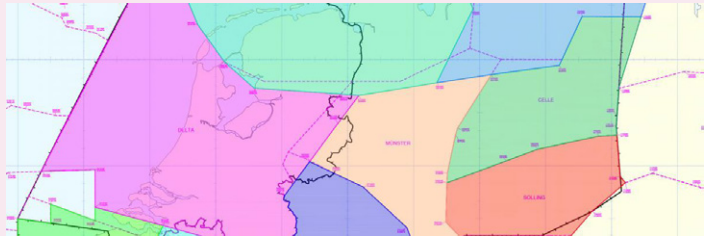
Benefits include a reduction in flight planning restrictions and the creation of several shorter flight-plannable route options. Simulations predict that, on the basis of pre-pandemic traffic, the change will bring a weekly CO<sub>2</sub> saving

▶ *cont'd*

25/03/2021

**EUROCONTROL MUAC OPTIMISES AIRSPACE SECTORS TO DRAW FULL BENEFIT FROM FREE ROUTE AIRSPACE ▶cont'd**

potential of 6,700 kg and offer flight-plannable gains of 280 NM. These savings are either directly achievable through explicit changes in the European Route Availability Document (RAD) or readily available thanks to improved alignment between sector boundaries and specific FRA trajectories. In order to help airspace users identify their individual saving potential, the MUAC AO AIRAC Brief highlights the explicit and also the implicit changes to flight plan routings within the improved MUAC sectorisation.



Source: EUROCONTROL

25/03/2021

**IATA RELEASES 2020 SAFETY REPORT, DETAILS AIRLINE SAFETY PERFORMANCE**

The International Air Transport Association (IATA) announced the publication of the 2020 Safety Report and released data for the 2020 safety performance of the commercial airline industry.

- The total number of accidents decreased from 52 in 2019 to 38 in 2020.
- The total number of fatal accidents decreased from 8 in 2019 to 5 in 2020.
- The all accident rate was 1.71 accidents per million flights. This is higher than the 5-year (2016-

2020) average rate which is 1.38 accidents per million flights.

- IATA member airlines' accident rate was 0.83 per million flights, which was an improvement over the 5-year average rate of 0.96.
- Total flight operations reduced by 53% to 22 million in 2020.
- Fatality risk remained unchanged compared to the five-year average at 0.13.

	2020	2019	5-YEAR AVERAGE (2016-2020)
All accident rate (accidents per one million flights)	<b>1.71 or 1 accident every 0.58 million flights</b>	1.11 or 1 accident every 0.9 million flights	1.38 or 1 accident every 0.75 million flights
Total accidents	38	52	52.4
Fatal accidents <sup>(1)</sup>	5	8 with 240 fatalities	7.6 with 222.4 fatalities
Fatality risk	0.13	0.09	0.13
Jet hull losses (per one million flights)	<b>0.21 which is equal to 1 major accident for every 4.8 million flights</b>	0.15 (one major accident for every 6.6 million flights)	0.20 (one major accident for every 5 million flights)
Turboprop hull losses (per one million flights)	<b>1.59 (1 hull loss for every 0.63 million flights)</b>	0.69 (1 hull loss for every 1.45 million flights)	1.07 (1 hull loss for every 1.0 million flights)

25/03/2021

**SWEDAVIA ACHIEVES WORLD FIRST AS NET ZERO CO<sub>2</sub> OPERATIONS ARE ANNOUNCED ACROSS ITS TEN AIRPORTS**

Just before the end of last year, Swedavia became one of the first airport operators in the world to have the operations it runs under its own management at its ten airports be fossil-free. The company notes this milestone in its Annual and Sustainability Report 2020. Swedavia is now extending that work to supporting other companies and organisations at its airports in transforming their operations, with a special focus on reducing climate impact of the Swedish aviation industry.

ACI EUROPE has welcomed the announcement from Swedish airport group Swedavia that all ten of its airports – including the Stockholm-Arlanda hub – have now achieved Net Zero CO<sub>2</sub> emissions across all operations under their control – a world first. Swedavia thus also becomes the first company to deliver on the European airport industry pledge to become Net Zero by 2050 at the latest.

30/03/2021

**SOUTHWEST AIRLINES ORDERS 100 BOEING 737 MAX JETS, PLUS 155 OPTIONS**

Boeing [NYSE:BA] and Southwest Airlines today announced the carrier will continue to build its business around the 737 MAX family with a new order for 100 airplanes and 155 options across two models. The deal comes after a multi-year fleet evaluation by Southwest and means that Boeing and its suppliers could build more than 600 new 737 MAX jets for the airline through 2031. Southwest had been exploring options to modernize the largest component of its fleet: the 737-700 that serves the airline’s needs for a 140-150 seat airplane. With the new agreement, the airline reaffirmed the 737-7 as its preferred replacement and growth airplane. The jet will complement the 737-8, which serves Southwest’s needs for a 175-seat model. Both 737 MAX family members will reduce fuel use and carbon emissions by at least 14% compared to the airplanes they replace, helping to improve operating costs and environmental performance. Southwest said the solution allows it to maintain the operational efficiencies of an all-Boeing 737 fleet to support its low-cost, point-to-point route network.



Source: Boeing

30/03/2021

**MAJOR U.S. AIRLINES COMMIT TO NET-ZERO CARBON EMISSIONS BY 2050**

Today, Airlines for America (A4A), the industry trade organization representing the leading U.S. airlines, announced the commitment of its member carriers to work across the aviation industry and with government leaders in a positive partnership to achieve net-zero carbon emissions by 2050. As part of that commitment, A4A carriers pledged to work with the government and other stakeholders toward a rapid expansion of the production and deployment of commercially viable sustainable aviation fuel (SAF) to make 2 billion gallons of SAF available to U.S. aircraft operators in 2030.



31/03/2021

**ALASKA AIRLINES OFFICIALLY JOINS ONEWORLD**

Marking a milestone in its 89-year history, Alaska Airlines today celebrated its first day as a member of oneworld. Alaska becomes the 14th full member of the global alliance, just eight months after receiving a formal invitation from oneworld in July 2020.



Source: Alaska



Februaru 25th

## *Hermes member Juan Carlos Salazar was elected Secretary General of ICAO*

**T**he 36-State governing body of the International Civil Aviation Organization (ICAO), the ICAO Council, has appointed Mr. Juan Carlos Salazar of Colombia as the new Secretary General of the Organization for a three-year term, beginning 1 August 2021.

Mr Salazar said: "I want to thank the Council of ICAO for providing a very strong mandate and for supporting a vision to work together for the recovery of aviation in all regions and to restore the confidence in the international civil aviation system."

"I would like to congratulate Juan Carlos on his new appointment. His winning personality, his active participation, his collaborative spirit will be a valuable addition to our industry. Colombia has a long history in aviation starting from its very early days. We are looking forward to working with Juan Carlos and to continuing our close relation with ICAO." added Dr Kostas Iatrou, Director General of Hermes – Air Transport Organisation.

Since January 2018, Mr. Salazar has been serving as Director General of Civil Aviation of Colombia at Aerocivil, a complex civil aviation organization with more than 3,100 employees and 12 trade unions. He is in charge of a network of 72 public airports and of the sole air navigation service provider in a country that serves as a key hub for air routes in Latin America. He has also served as Chief Executive Officer of the Colombian Civil Aviation Organisation and as Senior Advisor to the Civil Aviation Authority of the United Arab Emirates.

Finally Mr. Salazar is member of Hermes since 13 December 2019.



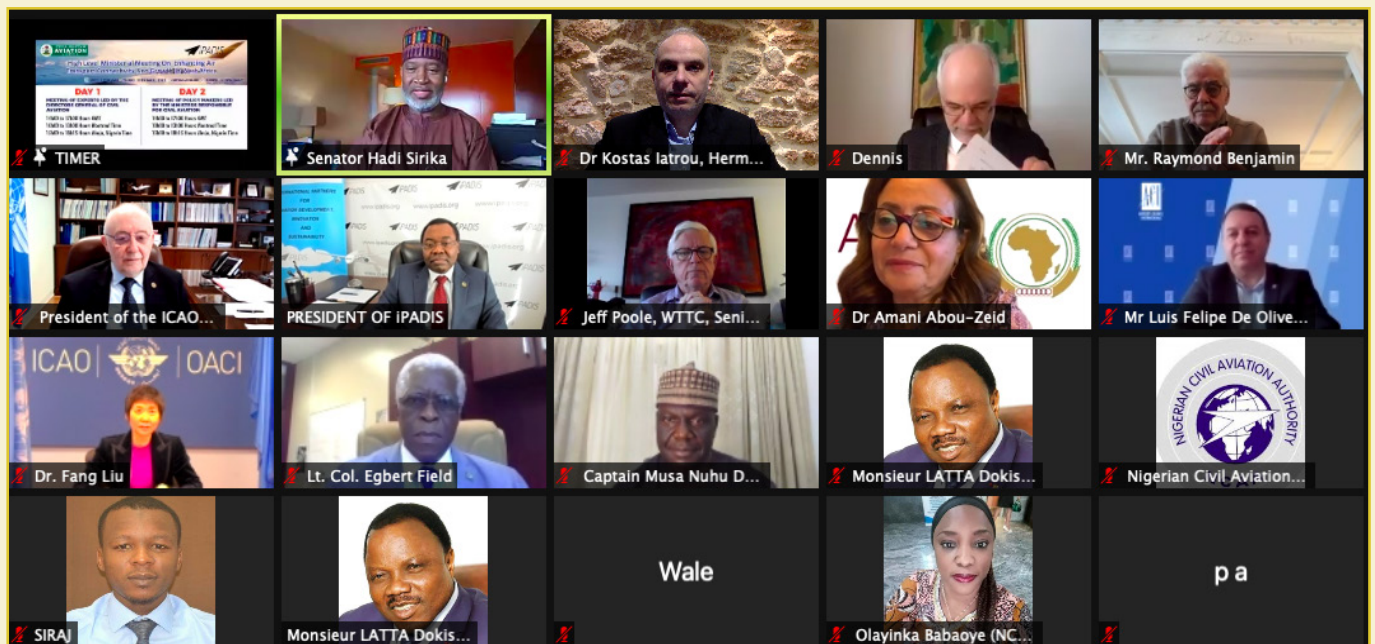


March 18th

## *Hermes Director General participates at the high level Ministerial Meeting on Enhancing Air Transport Connectivity and Growth in West Africa*

**D**r Kostas Iatrou, Director General of Hermes – Air Transport Organisation, representing Hermes participated in the High level Ministerial Meeting on Enhancing Air Transport Connectivity and Growth in West Africa held on 17 & 18 March 2021 organised by Nigerian Federal Ministry of Aviation and iPADIS. He participated in the panel of SESSION 4 – Strategies and Sectoral synergies that are required for air transport growth.

In his speech he stressed that now that the industry faces an unprecedented existential crisis it needs to bring together individuals with varied experiences to collaborate and solve complex situations as a diversity of experience is needed to see risks and opportunities from different angles to generate new, dynamic, and flexible solutions and adopt best practices. Long term strategic and risk-based scenario planning is crucial for the sustainable development of aviation to better prepare the industry for the next crisis. NGOs and Civil Society Organisations should act as fora for exchange, cooperation and collaboration and for institutionalizing collaborative and leadership practices. The role of the leader is not to issue directives but to influence and to coordinate so as to agree on a common set of goals. Hermes’s goal is to facilitate discussions on collaboration and leadership this is why it issues recommendations, this year’s focuses on Resilience and Efficiency through Leadership and Cooperation.





# 2021

## HERMES AGM & LEADERS FORUM Resilience and Efficiency Through Leadership and Cooperation

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# INTERVIEW



## MONTSERRAT BARRIGA

Director General



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

In light of the COVID-19 pandemic, a priority for all stakeholders within the industry right now is recovery and resilience, to ensure the future of European aviation and to maintain vital connectivity to the citizens of Europe. Another shared goal is sustainability and, guided by the ambitions of the European Green Deal, to ensure aviation contributes to climate neutrality by 2050. This is why ERA has joined forces together with the

European aviation sector in launching a series of climate commitments as part of the Aviation Round Table Report on the Recovery of European Aviation and the flagship climate initiative Destination 2050 – a route to net zero European aviation.

The Aviation Round Table Report, launched in November 2020, highlights how maintaining connectivity, skills and employment and preserving the European internal market and its competitiveness is vital for ensuring aviation's

recovery from COVID-19, improving its governance and making European aviation more resilient to future shocks. As well as specifically calling for a comprehensive Aviation Relief Programme to rebuild the sector following the pandemic, the report notes 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 commits to ambitious actions to tackle the sector's climate impact, and to strive for a so-



cially sustainable, competitive and more resilient aviation sector. This is a joint commitment alongside 23 fellow associations and has invited the EU and its member states to work alongside industry in defining and agreeing an EU Pact for Sustainable Aviation by the end of 2021 that covers social and environmental aspects. On the environmental side, topics include sustainable aviation fuels (SAFs); funding and investments to enable the acceleration of low-carbon aircraft innovations, such as electric and hydrogen; an incentive scheme for fleet renewal, coupled with retirement; increased public co-funding rates for civil aviation research and innovation (such as Clean Aviation and SESAR) through EU recovery mechanisms; and the revision of the Single European Sky and continuation of the EU Emissions Trading Scheme and CORSIA.

Underpinning this, our recently launched flagship initiative Destination 2050 is driven by a new, independent report, providing a vision and path for meaningful CO2 emission reduction efforts in Europe.

Led by ERA and fellow associations A4E, ACI EUROPE, ASD Europe and CANSO, it is the first pan-European, industry-wide, long-term vision that comes with concrete solutions to the complex challenge of reducing CO<sub>2</sub> emissions from commercial flights within and departing the EU, UK and EFTA.

There is an opportunity to reach net zero CO2 emissions by 2050 through a combination of four key measures, aligning European aviation with EU climate goals – subject to securing the required supporting policy and financing framework at EU and national level. These four measures include: improvements in aircraft and engine technologies, which could achieve emission reductions of 37 per cent; using SAFs, which could achieve emission reductions of 34 per cent; implementing economic measures, which could achieve emission reductions of 8 per cent; and improvements in air traffic management (ATM) and aircraft operations, which could achieve emission reductions of 6 per cent.

*How can the industry ensure that the achievement of these shared goals does not unduly advantage some stakeholders at the expense of others?*

It is important that any action taken does not affect airlines unevenly and that we are able to maintain competition. Big carriers, already dominant in their markets, have received large support since the start of the pandemic, while more fragile economies and markets cannot afford to support their airlines. It is therefore very likely that such state aid will lead to market distortions, with potentially smaller airlines being forced out of markets by larger and wealthier airlines. This uneven government aid all over Europe has consequently initiated a shift in market powers with regional carriers suffering the most, facing the toughest challenges as a result of unfair competition. If this happens, it will not end with the airlines, but will have direct and dramatic impact on the economic recovery of the European regions and the people living there, working directly in the industry or tourism

sector or dependent on infrastructure. Connectivity to the regions of Europe is vital particularly where aviation is the only means transportation.

Additionally, when it comes to sustainable solutions, it must be recognised that further regulatory burdens affect airlines' ability to stay solvent with regulations such as new environmental taxes affecting the bottom line. Governments must also avoid systems that penalise airlines for older aircraft; small to medium-sized airlines, particularly following the COVID-19 pandemic, do not have the same level of reserves as large airlines and are not in a position to invest in new, more efficient aircraft as easily. Further to this, it is important that states exploring new solutions such as new technology or SAF must ensure these are made equally available to all, not just for the larger carriers.

***How does the industry overcome some vested interests of some key stakeholders that may undermine the common good?***

European air transport is one of the toughest and most competitive markets in the world and the effects of the COVID-19 pandemic has only increased this. A pivotal decision made by the European Commission during this period has been to extend the slots waiver. If this decision had not been made, it would have been possible for some airlines to take advantage of the situation and monopolise the market. Whilst this would have been beneficial to them, it would have negatively impacted the wider industry. At ERA, we always work to protect consumer choice. The current diversity is needed, with smaller European carriers being more flexible to adopt changes, implement innovative technology needed for ensuring sustainability, customise their offers to passenger needs, connect remote regions to big hubs and contribute to local

employment. In the context of the slot waiver prolongation, this agreement has allowed for greater planning for not only airlines, but airports and co-ordinators, allowing them to maximise the use of capacity at a critical time and promote the recovery of air connectivity whilst still preventing anti-competitive behaviours.

***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?***

The aviation industry is large and varied and no one party can take ownership over defining its future: it is important that we work together. This is often the benefit of associations like ERA, as we are able to represent multiple airlines and aviation businesses, developing collective positions and the right actions for the wider community. We recognise the importance of each player across the aerospace industry's value chain and the role they will play to achieve our goals, and as ERA's recent work with the Aviation Round Table Report and Destination 2050 shows, we are now taking this one step further by joining other aviation stakeholders.

Nevertheless, the aviation industry cannot achieve its goals alone. Urgent action by EU leaders is needed to deliver policies to enable action. The EU Pact for Sustainable Aviation for example, will provide an opportunity to formalise and enact the required partnership between industry and European and national policy makers ensuring an agreement on joint sustainability targets and alignment between the related industry contribution and roadmap on the one hand and the enabling regulatory and financial framework on the other.

***During the COVID-19 pandemic, the***



***aviation industry has experienced unprecedented actions by States as they closed borders and instituted quarantines for air travelers. What cooperative arrangements can be put in place to guide state actions for the shared benefits of industry stakeholders? How can we achieve these cooperative arrangements?***

This year has seen industry react quickly to provide new health and safety processes such as airport testing, and has seen it subjugated to decisions beyond its control, such as border closures and quarantine rules. Whilst a vaccine is now a reality – it being only a matter of time before this is rolled out across Europe and beyond – it is essential that European aviation stakeholders and member states are aligned as we work towards recovery. To achieve this, a common road map is needed on subjects such as testing and quarantines, as well as the EU's proposed Digital Green Pass. This proposal requires EU member states to issue common, interoperable and mutually recognised certificates for COVID-19 vaccination, testing and recovery status. We fully support this, but we are a long way out of this crippling situation and need the member states to implement common solutions and plan ahead in a fully co-ordinated and aligned way.



# Taking off Again: The Air Transport Sector in the Post COVID-19 Era



The insightful executive webinar “Taking Off Again: The Air Transport Sector in the Post Covid-19 Era” (18 February), following the online annual general meeting, was hosted by the Hellenic Aviation Society. The event fulfilled under the auspices of Hermes Air Transport Organisation and some of the most significant stakeholders of the air transport and tourism sector shared their opinions for the future of the industry, in a post-Covid19 era. The ATN was the media partner of the event.

**D**r Kostas Iatrou, Director General of Hermes Air Transport Organisation and Honorary Member of the Hellenic Aviation Society, welcomed all participants to the event, addressed to the need of the aviation sector to navigate uncharted waters in a safe yet innovative manner and finally presented this year’s keynote speaker, and President of ICAO

Council. Moreover, **Prof Dr Andreas Papatheodorou** presented Salvatore Sciacchitano with the prestigious Hellenic Aviation Society Keramianakis Award, for his great contribution to the industry over the years.

The President of ICAO Council, **Salvatore Sciacchitano**, addressed to the last ICAO Economic



# Taking off Again: The Air Transport Sector in the Post COVID-19 Era



Analysis which presented a decrease of 60%, or 2,7 million, on passenger traffic. He also mentioned the strong impact of COVID-19 on air travel and tourism by pointing out the liquidity issues as well as, the job losses, during the pandemic. Salvatore Sciacchitano highlighted the important role of ICAO Council to react and present a roadmap towards restart and recovery of the sector. On an immediate response to the pandemic the ICAO Council, in cooperation with several industry stakeholders, established the CART (Council Aviation Recovery Task) Task Force. The role of CART was the elaboration of principals and recommendations in order to establish an international alignment and apply common synergies throughout the industry. Furthermore, Salvatore Sciacchitano referred the importance of vaccine certifications on global basis as well as the establishment of standard health protocols. The creation of health corridors through bilateral agreements for vaccination between countries referred as the key for a safe, secure and sustainable future.

Furthermore, ICAO Council monitors the pandemic through several platforms which provide health data from the 95% of its members. This data will allow ICAO to create recovery roadmaps, prepare for any future pandemic events, introduce economic viability strategies, based on the new normality, and prioritise the impact of the industry on the climate change. Finally, he recognised the role of innovation as main pillar for the future of the industry, on security, safety and environmental challenges.

As a moderator of the webinar, **Jeff Poole**, President of Hermes Air Transport Organisation and Senior Vice President of World Travel and Tourism Council (W TTC), highlighted the uncertain and challenging times of the pandemic as well as pointed out that the air transport sector has to remain agile and robust for the future. He identified pandemic as a constant evolving situation which creates lack of confidence for the passengers as well as the need to reconvince them to travel again. At





## Taking off Again: The Air Transport Sector in the Post COVID-19 Era



Eamonn Brennan DG EUROCNTRL - Henrik Hololei DG Mobility EC

last, the President of Hermes Air Transport Organisation identified that governments acted individually against the pandemic and focused on the ways they will start to operate as a whole.

**Henrik Hololei**, Director General for Mobility and Transport at European Commission, addressed the following months as the most difficult ones. Most of the flights in Europe remained in halt at that moment and the need to create conditions for travel was essential. As a European Commissioner he identified the large number of air travel restrictions, which make travel impossible, as well as he said that a large number of restrictions will remain within the industry for the near future. The main priority for the European Union is to regain the trust and confidence of the passengers, as they are the lifeline, and finally make them feel secure again. He added that the EU maintain its competitiveness, prosperity as well as resilience and the fact that the former would remain only with strong government support. Summarising

his speech, Henrik Hololei addressed the lack of willingness for collaboration, on a governmental level, as well as to the importance of the acceleration of the vaccination processes as a key factor for confidence among the passengers.

On a similar track, **Eamonn Brennan**, Director General of EUROCONTROL, identified the summer season as vital for the industry and vital to be rescued. He presented a challenging situation for the European market, especially due to the heavy losses of the European flag carriers. Moreover, he addressed the importance of the long-haul travel for the European carriers and the serious challenges they face, due to their strong dependency on hub and spoke operations. He also pointed out the gradual loss of connectivity, between airports as well as the lack of financial viability of regional airports after the pandemic. At last, the Director General of EUROCONTROL admitted that the air transport industry lost the battle on its effort to promote itself as



# Taking off Again: The Air Transport Sector in the Post COVID-19 Era



**18.02.2021**

➤ ΔΙΑΔΙΚΤΥΑΚΗ ΕΤΗΣΙΑ ΤΑΚΤΙΚΗ ΓΕΝΙΚΗ ΣΥΝΕΛΕΥΣΗ & ΚΟΠΗ ΠΙΤΑΣ / ONLINE ANNUAL GENERAL MEETING

➤ ΔΙΑΔΙΚΤΥΑΚΗ ΣΥΝΕΔΡΙΑ / EXECUTIVE WEBINAR

**Taking off Again: The Air Transport Sector in the Post COVID-19 Era**

**Πρόγραμμα / Programme**

*Restarting Air Travel / Restarting the Economy*



**18.02.2021**

➤ ΔΙΑΔΙΚΤΥΑΚΗ ΕΤΗΣΙΑ ΤΑΚΤΙΚΗ ΓΕΝΙΚΗ ΣΥΝΕΛΕΥΣΗ & ΚΟΠΗ ΠΙΤΑΣ / ONLINE ANNUAL GENERAL MEETING

➤ ΔΙΑΔΙΚΤΥΑΚΗ ΣΥΝΕΔΡΙΑ / EXECUTIVE WEBINAR

**Πρόγραμμα / Programme**  
(Greece time zone - UTC+2)

**18:00 – 19:00** 2021 ANNUAL GENERAL MEETING OF THE HELLENIC AVIATION SOCIETY (members-only)  
Η Ελληνική Αεροπορική Ένωση (www.aviationsociety.gr) καλεί τα μέλη της να συμμετάσχουν μέσω Zoom στην Ετήσια Τακτική Γενική Συνέλευση και την κοπή της πίτας μας. Ο σύνδεσμος σύνδεσης στο Zoom θα αποσταλεί μέσω ηλεκτρονικού ταχυδρομείου.

**19:00 – 19:05** WELCOME NOTE  
**Dr Kostas Iatrou**, Honorary Member, Hellenic Aviation Society  
Director General, Hermes - Air Transport Organization

**19:05 – 19:20** KEYNOTE ADDRESS  
**Salvatore Sciacchitano**, President, International Civil Aviation Organization Council

**19:20 – 19:30** KERAMIANAKIS AWARD CEREMONY

**19:30 – 21:00** EXECUTIVE PANEL  
**TAKING-OFF AGAIN: THE AIR TRANSPORT SECTOR IN THE POST COVID-19 ERA**

**Moderator:** **Jeff Poole**, President, Hermes - Air Transport Organisation  
Senior Vice President, World Travel and Tourism Council

**Panellists:** **Henrik Hololei**, Director General for Mobility and Transport, European Commission  
**Luis Felipe de Oliveira**, Director General, Airports Council International (ACI)  
**Abdul Wahab Teffaha**, Secretary General, Arab Air Carriers Organization (AACO)  
**Eamonn Brennan**, Director General, EUROCONTROL  
**Dr Yiannis Paraschis**, CEO, Athens International Airport  
**Prof Dr Andreas Papatheodorou**, President, Hellenic Aviation Society

Everyone is invited to attend the webinar, which will be live broadcast on the Hellenic Aviation Society's YouTube channel:  
[https://www.youtube.com/channel/UCD\\_h1HEYr2-Jc2AH0INVc0](https://www.youtube.com/channel/UCD_h1HEYr2-Jc2AH0INVc0)

Established in 2004, the Hellenic Aviation Society is a highly dynamic scientific non-profitable forum on aviation issues in Greece, which aims to contribute to the progress and promotion of scientific work in air transport; to present and promote the role of aviation and its contribution to the economic, political and social development to the wider public of Greece; to offer survey, research and advisory assistance to governmental and private institutions involved in aviation; to collaborate with Higher Education Institutions and other organizations engaged in the area of aviation; and to create and to keep Historical Archives and a Library for both Hellenic and international aviation.

**3** *Restarting Air Travel / Restarting the Economy*

a secure and healthy way of transportation, through the pandemic era. He said that the acceptance of the health passport is a priority, and should be also adopted by other countries as well as the industry needs to move on and provide innovative technological solutions for the future of the air travel.

Representing the airport perspective, **Luis Felipe De Oliveira**, Director General of Airport Council International (ACI), also admitted the loss of the power of the air transport sector. He focused on the collaboration and cooperation of Industry Bodies and Governments, in order to face this global pandemic. Luis Felipe De Oliveira identified the need of process and measure harmonisation among the markets as well as the implementation of the CART guidelines. In particular, the Director General of ACI focused to the

support of small and medium-haul airports, as he said 80% of WTTTC includes small and medium enterprises. The ACI deployed a support strategy on two (2) main pillars:

- Renew of the ACI Fund: Financial and training support for the development of the less developed airports to meet the global standards
- Prepare those airports to deal with the cargo processes as an alternative source of revenue

Concluding his speech, Luis Felipe De Oliveira identified every airport as a different entity with different needs. However, the ownership of each airport plays an important role on the way it will face the pandemic as well as its actions for the domestic market recovery.



## Taking off Again: The Air Transport Sector in the Post COVID-19 Era

**Abdul Wahab Teffaha**, Secretary General of AACO, admitted that there is a form of process harmonisation but still most of the air transport stakeholders act individually. He also identified the strong presence of fear regarding the policy making procedures. He addressed to the global recognition of health passports as vital for the future of the air travel. At the same time there is a strong need for global criteria for the establishment of health corridors and travel bundles. However, Abdul Wahab Teffaha pointed out that these strategies have to be processed of an industrial, and not governmental, level. Furthermore, the Secretary General of AACO concentrated on the four (4) pillars which the industry needs to focus on the next years. There are:

- Technology
- Sustainable Fuels
- Offsetting
- Infrastructure

Finally, he adds that the last years the airlines mostly concentrated on the offsetting pillar. He identifies technology as an alternative tool for the industry as well as its harmonisation and total penetration to the travel process as the way forward.

Representing the Greek airport market, **Dr Yiannis Paraschis**, CEO of Athens International Airport also raised his concerns over the individual approach of every country, regarding the air travel. He also addressed to the pre departure PCR tests as a temporal health measure while he hopes the vaccine will be the first step towards recovery. Moreover, Dr Yiannis Paraschis said that additional measures will only provide lower passenger numbers and at this stage airports can only operate with strong financial support for the governments. However, airports never stop operations, that is why there is a fundamental need for future planning. Airports need to plan on a medium and long term and invest on health, sustainability as well as technology, not only bigger capacity.

At last, Prof. Dr Andreas Papatheodorou, President of Hellenic Aviation Society, Professor and Director

at University of the Aegean, highlighted the fact that air transport industry remains a strong pillar and key player of the global economy. He mostly focused on the impact of the pandemic in Greek tourism market as well as he pointed out that tourism is vital for the country's GDP and Greece should promote itself as a safe destination. He addressed to the pandemic as a multilateral challenge which need to be faced with cooperation from all stakeholders.

After finishing their speeches, all participants expressed their opinions on the phenomenon of the "New Normal" among the aviation industry. Henrik Hololei identified health safety as a new dimension for the industry which will play an important role in the future. However, he mentions that the industry does not need any more regulations and that it will eventually evolve on a long term. Director General of EUROCONTROL stated that the future of air transport will have much less carriers but the connectivity expects to be sufficient. He also pointed out that to maintain the balance in the sector, the participation and cooperation of all stakeholders is essential.

The majority of the speakers presented sustainability as an integral part of the "New Normality". Abdul Wahab Teffaha highlighted sustainability as the way forward for tourism as well as the fact that regulators and stakeholders need to invest on technology and infrastructure for a more sustainable future. On the airport side, the vulnerability of the airports demands new regulations for their protection. However, Luis Felipe De Oliveira identified that airports need to adopt sustainable strategies and follow the trends of climate change and digital transformation as well.

At last, Prof. Dr Andreas Papatheodorou analysed the importance of health protocols among the industry as well as the importance of destination management after such global events. He pointed out that every crisis is an opportunity. A global event can only be faced by a global response, which implies a strong need for synergies among the aviation industry. Finally, he added that aviation and tourism remain stronger together.



# High level Ministerial Meeting on Enhancing Air Transport Connectivity and Growth in West Africa



## West Africa Ministers and iPADIS Map Out Air Transport Recovery Plan

**Montréal, 19 March 2021** – A high-level ministerial meeting of Western African States concluded yesterday with a 15-point post-covid recovery plan for air transport in the region, including strategies for the long-term sustainable development of the industry.

The two-day virtual event on enhancing air connectivity and growth in West Africa was organized by the Federal Ministry of Aviation of Nigeria, in cooperation with the International Partners for Aviation Development, Innovation and Sustainability (iPADIS). Also, participating were Central African and Caribbean States, international and regional financial and regulatory organizations, as well as industry stakeholders from air transport, tourism, trade, public health and related sectors.

Senator Hadi Sirika, Nigerian Minister of Aviation, stated that “Nigeria’s determination to host the High-Level Ministerial Meeting is borne out of the desire to find a lasting solution to the challenges of this sector in our sub-region, especially at a time when the industry is unprecedentedly being impacted by the Covid-19 pandemic, resulting in depressed travel demands and disruptions of businesses globally.”

Minister Sirika called on States to address the issue of financing and modernization of aviation infrastructure and to attract support from private investors by “building a transparent, stable and predictable investment climate, as well as by include aviation in national development plans”.

Dr. Olumuyiwa Benard Aliu, founding president of iPADIS, likewise stressed the need for strengthened levels of collaboration and decisiveness among West African governments and industry stakeholders in addressing the COVID-19 challenge and ensuring a rapid recovery of the air transport and tourism sectors, vital to stimulating economic development in the region.

## West Africa Ministers and iPADIS Map Out Air Transport Recovery Plan



“I am confident that the 15 West African States have the potential and the resourcefulness to transform their region into a leading aviation market and to take full advantage of air transport as a major contributor to trade, tourism and GDP”, said Dr. Aliu.

“What is required is political determination to turn the COVID-19 crisis into an opportunity to enhance the contribution of civil aviation to West Africa’s economic growth, social progress and integration, and overall sustainable development. Your collaboration and leadership will be critical to implement necessary strategies and synergies for a sustainable and resilient air transport system worthy of the great potential of this region”, he emphasized.

Dr. Aliu thanked the Nigerian Government for hosting the event and reiterated that iPADIS is looking forward to continue collaborating with Nigeria, other members of the Economic Community of West African States (ECOWAS), as well as other partner organizations, to ensure effective implementation of the decisions of the high-level ministerial meeting.



## Enhancing Air Transport Connectivity and Growth in West Africa

### COMMUNIQUE

**We**, Ministers responsible for air transport from West African States, neighbouring Central African States as well as from the Diaspora held a High-Level Ministerial meeting on Enhancing Air Transport Connectivity and Growth in West Africa on 18 March 2021, at the kind invitation of the Federal Ministry of Aviation, Nigeria in cooperation with the International Partners for Aviation Development, Innovation and Sustainability (iPADIS).

We considered many issues affecting air transport and related sectors, the impact and recovery from the ongoing COVID-19 pandemic crisis as well as strategies and synergies to establish air transport on a path of sustainable and resilient growth in our States and region. Arising from our deliberations, We:

1. Acknowledge the population of over 380 million people, a land mass of 5,112,903 Square kilometres and many historical and cultural touristic sites within the fifteen (15) ECOWAS member States, some of which are small island and landlocked States. Also acknowledge that an important part of the African Diaspora is originating from this region.
2. Recognise the importance of air transport as a tool for regional economic growth, social integration and overall sustainable development, in line with the African Union vision for African integration, including travel, tourism and trade.
3. Affirm our determination to take full advantage of the safe and rapid interconnectivity that air transport offers for intra regional and international travels for our citizens and businesses.
4. Acknowledge the longstanding pre-COVID 19 challenges and the slow pace of air transport development and connectivity in the region that should have been effectively addressed, which the COVID-19 crisis have further exacerbated.
5. Determine to take urgent steps to address those factors that militate against national and regional solutions to sustainable development and growth of air transport in the region including political, institutional, financial, technological, technical expertise, capacity building, manpower development, infrastructure development, proliferation of taxes, regulatory constraints, etc.
6. Note that COVID-19 underscored the impact of public and user's confidence on operational and financial viability of air transport and accordingly, recognise that continuous improvement in safety, security, efficiency, reliability, comfort, affordability, and competitiveness of air travel is critical to sustainable development and growth of air transport.
7. Recognise that the current COVID-19 crisis further underscores the importance of inter-sectoral collaboration and synergies between air transport and other sectors of the

## Enhancing Air Transport Connectivity and Growth in West Africa

economy such as tourism, trade, finance, public health, immigration and border control etc., and that opportunities and threats in those sectors have significant impact on the strength and growth of air transport and vice versa.

8. Undertake to support the expeditious recovery of the air transport, travel, tourism trade and related sectors with the aim to reimagine, revitalize and retool the aviation system in West Africa to meet present and future challenges.
9. Recognise the need for regional collaboration for immediate development and implementation of harmonised air travel related public health policies and protocols as well as joint action to ensure that the interest of the region, its citizens and operators are not unduly or discriminatorily impacted by air travel policies and protocols, implemented by foreign governments and international organisations in the wake of COVID-19.
10. Appreciate the importance of establishing short, medium, long term and risk-based national and regional strategic civil aviation plans with clear objectives, measurable targets, milestones, accountabilities and monitoring mechanisms to establish sustainable, innovative, socially responsible and resilient aviation systems as well as the need to integrate such civil aviation plans into national and regional economic development plans.
11. Commit to develop, review and implement national, regional and international civil aviation policies, regulatory frameworks, and strategic plans that promote the growth of air transport in a sustainable, innovative and socially responsible manner.
12. Welcome a more active involvement of non-governmental organizations, civil society organizations and stakeholders to ensure that international civil aviation policies, plans and programmes consider the interests of users of air transport services and overall benefits to the society.
13. Urge all operators including airlines, airports, air navigation service providers, training organizations, freight forwarders, ground handling and catering services companies, etc. to review and adapt their plans, business models and operations to address current challenges and future risks, and to implement innovative technologies and solutions to ensure long-term sustainability and resilience of air transport systems in the region.
14. Express appreciation to the Federal Ministry of Aviation of Nigeria, the ECOWAS Commission and iPADIS for organizing and facilitating this Event and urge their continuing support to the implementation of the outcomes by States and stakeholders.
15. Thank AUC, AFCAC, AfDB, ICAO, UNWTO, WHO, World Bank and other regional and international, industry and civil society organizations for their active participation in the event and urge their continuing support and assistance to air transport development in the West African region.

## Enhancing Air Transport Connectivity and Growth in West Africa

Finally, we appreciate the spirit of openness and cordiality that prevailed during our deliberations in the Meeting.

The list of States and international organisations that attended and participated in the meeting is attached to this Communiqué.

18 March 2021

### High Level / Ministerial Meeting on Enhancing Connectivity and Growth in West Africa

## Enhancing Air Transport Connectivity and Growth in West Africa

### PLAN OF ACTION

1.	ACTIVITIES AND ACTIONS	LEAD	SUPPORTING ORGANIZATION	TIMELINES
<b>IMPORTANCE OF AIR TRANSPORT TO ECONOMIC GROWTH AND DEVELOPMENT IN WEST AFRICA.</b>				
<i>With a population of over 380 million people, land mass of 5,112,903 Sq. km, geographical location, etc, Air Transport is a vital tool for economic growth, social integrations and overall sustainable development of West Africa.</i>				
i.	Promote the role of Air transport as an important tool and catalyst for regional economic growth, social integration and overall sustainable development of West Africa.	States and ECOWAS	AFCAC, ICAO other regional bodies and iPADIS	Continuous
ii.	Put in place appropriate policies that would create conducive operating environment for air transport businesses, stimulate traffic and support sustainable airline operations in the sub-region.	States and ECOWAS	AFCAC, ICAO other regional bodies and iPADIS	2021-2023
iii.	Assess the direct and indirect contribution of air transport to the national and regional GDP and put in place measures to increase it.	States and ECOWAS	iPADIS and other development partners	2021-2023



## Enhancing Air Transport Connectivity and Growth in West Africa

2.	ACTIVITIES AND ACTIONS	LEAD	SUPPORTING ORGANIZATION	TIMELINES
<b>PRE-COVID 19 CHALLENGES AND THE SLOW PACE OF AIR TRANSPORT DEVELOPMENT IN THE REGION</b>				
<i>Pre-COVID 19 challenges and the factors that have militated against air transport development in the region should be effectively addressed.</i>				
i.	Promote the implementation of the various Declarations, Decisions, Roadmaps, Plans of Action, Targets etc. that have been adopted to facilitate the development air transport at the national and regional levels.	ECOWAS	AFCAC, ICAO, iPADIS and other development partners	2021-2022
ii.	Address factors that militate against national solutions to sustainable development and growth of air transport in the region including political, institutional, planning, financial, technological, technical expertise, capacity building, and manpower development, infrastructure development, proliferation of taxes, regulatory constraints, amongst others.	States and ECOWAS	AFCAC, ICAO, iPADIS and other development partners	2021-2022
iii.	Reassess the role and revitalize the contribution of civil aviation in West Africa to the economic growth, social progress and integration, and overall sustainable development.	ECOWAS	AFCAC, ICAO, iPADIS and other development partners	2021-2022

3.	ACTIVITIES AND ACTIONS	LEAD	SUPPORTING ORGANIZATION	TIMELINES
<b>IMPACT AND SOLUTIONS TO COVID-19 CHALLENGES ON AIR CONNECTIVITY</b>				
<i>The impact of COVID-19 Pandemic on air transport in West Africa further exacerbated the difficult position of the industry in the region and underscored the importance of public and user's confidence on operational and financial viability of air transport. It is therefore encouraged that the users of aviation services and the civil society should be consulted and involved in the development and implementation of aviation recovery plans and public health protocols applied to air transport.</i>				
i.	Implement a process for regular consultation with users and the public on the implementation of passenger facilitation programmes generally and on the Aviation Covid-19 recovery plans and the public health protocols applied to air transport.	States	ECOWAS, AFCAC ICAO, and iPADIS	2021
ii.	Implement targeted, fit for purpose and well publicized air transport public health protocols applied in a manner that facilitate easy compliance by travelers.	States	ECOWAS, AFCAC, ICAO, WHO-Africa, and iPADIS	2021
iii.	Implement a process for regular consultation with non-governmental and civil society organisations representing the interest of users and the public on the development and implementation of passenger facilitation programmes.	States, ECOWAS, AFCAC and ICAO	iPADIS and other non-governmental organisations	2021-2022
iv.	Enhance safety, security, facilitation, passenger health, efficiency, reliability, comfort, affordability, and competitiveness of air travel.	States	ICAO, AFCAC, and iPADIS	Continuous
v.	Assist and support the expeditious recovery of the air transport, tourism, trade and related sectors with the aim to reimagine, revitalize and retool the aviation system in West Africa to meet present and future challenges.	States	AU, AFCAC, ICAO, UNWTO, AfDB, World Bank, iPADIS and other development partners etc.	2021

## Enhancing Air Transport Connectivity and Growth in West Africa

vi.	Develop and implement harmonised air travel related public health policies and protocols for the West African region.	States and ECOWAS	AFCAC, ICAO, WHO-Africa, African CDC and iPADIS	2021
vii.	Develop and implement a joint assessment and reciprocal policy on air travel related public health policies and protocols, implemented by third party governments and organisations.	States and ECOWAS	AFCAC, ICAO, WHO-Africa, African CDC and iPADIS	2021

4.	ACTIVITIES AND ACTIONS	LEAD	SUPPORTING ORGANIZATION	TIMELINES
<b>INTER-SECTORAL COLLABORATION AND SYNERGIES BETWEEN AIR TRANSPORT AND OTHER SECTORS</b>				
<i>Opportunities and threats in other sectors such as tourism, trade, finance, public health, immigration and border control etc. have significant impact on the strength and growth of air transport and vice versa. Also in order to ensure that civil aviation policies, plans and programmes consider the interests of users of air transport services and overall benefits to the society, a more active involvement of non-governmental organizations, civil society organizations and stakeholders should be encouraged.</i>				
i.	Establish and implement a process for regular inter-sectoral consultation and collaboration between air transport and other sectors of the economy such as tourism, trade, finance, public health, immigration and border control etc.	States	ECOWAS, AFCAC, ICAO and UNWTO	2021
ii.	Develop, review and implement civil aviation policies, regulatory frameworks, and strategic plans that promote the growth of air transport in a sustainable, innovative and socially responsible manner.	States	ECOWAS, AfDB and iPADIS	2021
iii.	Establish short, medium, long term and risk-based national and regional strategic plans with clear objectives, measurable targets, milestones, accountabilities and monitoring mechanisms.	States	ECOWAS, AfDB and iPADIS	2021-2023
iv.	Align and integrate civil aviation master plans with their national and regional economic development plans.	States	ECOWAS, AfDB and iPADIS	2021-2023
v.	Implement a framework to enable regular engagement with non-governmental organizations, civil society organizations and stakeholders in the development and implementation civil aviation related policies, plans and programmes.	States, ECOWAS, AFCAC and ICAO	iPADIS	2021-2022
vi.	Organize Non-governmental organizations, and civil society organizations in the civil aviation and related sectors under an umbrella organisation for a more effective participation at the regional and global aviation levels. Within one year.	iPADIS	States, ECOWAS, AFCAC, ICAO and Donor Agencies	2021-2022

## Enhancing Air Transport Connectivity and Growth in West Africa

5.	ACTIVITIES AND ACTIONS	LEAD	SUPPORTING ORGANIZATION	TIMELINES
<b>REVITALISE AND REPOSITION THE AIR TRANSPORT INDUSTRY IN THE REGION</b>  <i>Industry operators and service providers including airlines, airports, air navigation service providers, etc. should review their business models and implement innovative technologies and solutions to ensure long term sustainability and resilience of air transport services in the region.</i>				
i.	Review and adapt plans, business models and operations to overcome current challenges and ensure resilience against future risks.	Airlines, airports, ANSPs and other service providers	States, AfDB, IATA, ACI	Continuous
ii.	Promote and apply innovative technologies, digitalized processes, approaches and thinking in the air transport and related sectors.	States	International Organisations, NGOs, operators and service providers	Continuous
iii.	Encourage cooperation and partnership among airlines in West Africa, by putting in place policies that allows cross border investments among member States.	States	ECOWAS, AFCAC, AFRAA and ICAO	Continuous
iv	All forms of regulatory impediments and constraints on granting of traffic rights to airlines in the region to promote intra regional travels should be removed.	States	ICAO, AFCAC, ECOWAS and iPADIS	Continuous
v	Appropriate regulations to support the operations and digitalization of air cargo operations in the region in order to maximise the benefits of the African Continental Free Trade Agreement (AfCFTA) should be put in place.	States	ICAO, AFCAC, ECOWAS and iPADIS	Continuous
vi	Support and assistance be given to the industry to safeguard the employment of their personnel, who should be retrained to acquire versatile skills in order to contribute to the ongoing recovery and repositioning of the air transport industry in West Africa	States, Airlines, airports, ANSPs and other service providers	ICAO, AFCAC, ECOWAS, iPADIS, AFRAA, ACI, IATA, CANSO, ITF, and AATO	Continuous

6.	ACTIVITIES AND ACTIONS	LEAD	SUPPORTING ORGANIZATION	TIMELINES
<b>FOLLOW-UP ACTION AND MONITORING</b>  <i>The continuous support and assistance of international organisations, civil society organisations and development partners, etc., to the development of air transport in West African Region are encouraged. Additionally, a monitoring framework to monitor the implementation of the regional plan should be established.</i>				
i.	Establish a monitoring framework to monitor and report on the implementation of the Regional Plan of Action as well as organize and facilitate the implementation of follow up activities.	States and ECOWAS	AFCAC, ICAO and iPADIS	2021
ii	Strengthen the capacity of States and ECOWAS, Air Transport Department to facilitate the development of sectoral and regional Plan of Action.	States and ECOWAS	AFCAC, ICAO and iPADIS	Continuous
ii.	Continue to support and assist air transport development in the West African region.	States and ECOWAS	AUC, AFCAC, AFRAA, ICAO, iPADIS, AfDB, World Bank, IATA, ACI,	Continuous
			UNWTO, CANSO, ASECNA, etc.	

## Enhancing Air Transport Connectivity and Growth in West Africa

### APPENDIX TO COMMUNIQUE

#### LIST OF STATES

##### ECOWAS member States:

1. Benin
2. Cabo Verde
3. Côte d'Ivoire
4. Gambia
5. Ghana
6. Liberia
7. Mali
8. Niger
9. Nigeria
10. Senegal
11. Sierra Leone
12. Togo

##### Other States:

13. Cameroon
14. Equatorial Guinea
15. Guyana
16. Jamaica

#### LIST OF ORGANISATIONS

1. Africa Airlines Association (AFRAA)
2. African Civil Aviation Commission (AFCAC)
3. African Development Bank (AfDB)
4. African Union Commission (AUC)
5. Agency for Aerial Navigation Safety in Africa (ASECNA)
6. Airport Council International (ACI)
7. Banjul Accord Group Accident Investigation Agency (BAGAIA)
8. Banjul Accord Group Aviation Safety Oversight Organisation (BAGASSO)
9. Civil Air Navigation Services Organisation (CANSO)
10. Economic Community of West African States (ECOWAS)
11. Hermes - Air Transport Organisation
12. International Air Transport Association (IATA)
13. International Civil Aviation Organization (ICAO)
14. International Federation of Air Line Pilots Associations (IFALPA)
15. International Partners for Aviation Development, Innovation and Sustainability (iPADIS)
16. International Transport Workers' Federation (ITF)
17. United Nations World Tourism Organisation (UNWTO)
18. World Bank
19. World Travel & Tourism Council (WTTC)

# The Latin America Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency Through Leadership and Cooperation

Organisers:



AERONÁUTICA CIVIL  
UNIDAD ADMINISTRATIVA ESPECIAL



**HERMES**  
AIR TRANSPORT ORGANISATION



Media Partner:



## The Latin America Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency Through Leadership and Cooperation



Hermes – Air Transport Organisation and Aeronautica Civil de Colombia co-organised an insightful online event regarding the issues, challenges and opportunities which may arise, on the Latin American Air Transport market, in the post COVID-19 era. The panel consisted of a great variety of aviation stakeholders, who shared their opinions regarding the needed actions which will provide resilience and efficiency to the industry through mutual efforts and initiatives.



**Juan Carlos Salazar**,  
Director General,  
Aeronautica Civil  
de Colombia.

**Juan Carlos Salazar**, Director General, Aeronautica Civil de Colombia, and **Dr Kostas Iatrou**, Director General, Hermes – Air Transport Organisation, presented their welcome speeches by pointing out the major challenges in the Latin American market, which occurred due to Covid-19 pandemic, as well as the importance of Leadership and Cooperation for the future of the air transport industry.

The first keynote speaker, **Salvatore Sciacchitano**, President of the Council, ICAO, addressed to the severe impact of COVID-19 on the Air Transport Industry by mentioning that ICAO is projecting an overall global reduction in passenger volumes of between 41-50% for 2021, compared to the 60% reduction it monitored

## The Latin America Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency Through Leadership and Cooperation



for 2020. Following his speech, he emphasised on the significant downturns on the global and regional air travel which continue to present high liquidity strains to all aviation related companies, as well as across the full extent of the air transport and tourism value chain. The President highlighted, once again, how the ICAO Council's Aviation Recovery Task Force (CART) provides the guidelines and recommendations for an international alignment of measures and the promotion of a more effective public-private cooperation among governments and the aviation industry. The Phase III of the CART's guidance and recommendations lays the foundation for the creation of public health travel corridors, promotion of safe and efficient global vaccine distribution and multilateral cargo air services, and encourages standardized COVID-19 testing certificates for secure international use. A short-term success with these strategies will establish risk management strategies for a gradual route opening. Moreover, he long-term implications identified as

major challenge, among aviation leaders, as they have to choose between acceleration of digitization or higher passenger expectations for healthier and more sustainable travel options. At last, Salvatore Sciacchitano identified the multidimensional nature of the Covid-19 crisis as well as the importance of the new regional air cargo liberalization agreement which will help on the distribution of the vaccine and long-term recovery across Latin America.

As the second keynote speaker, **Luis Felipe de Oliveira**, *Director General of ACI*, expressed his optimism for the future due to surge of global vaccinations, easing of several country restrictions as well as falling infection statistics. He identified the vulnerability of the air transport sector to events of such scale as well as that the insurance of the highest level of safety and security for passengers and operations is industry's top priority. The challenges which arise of such events provide great opportunities for cooperation among the aviation sector. Luis Felipe de

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Oliveira recognised ICAO Council Aviation Recovery Task Force (CART) as an example which enables collaboration among governments and between governments and the industry. He also welcomed Phase III of CART's guidelines and presented Airport Health Accreditation programme for the support of global coordination of new measures and recovery. The highly involving programme consists of almost 600 participants, which represent 70% of the global passenger traffic and aims to the prioritisation of health and safety as well as harmonisation of global guidelines. Director General referred to the need for an establishment of a sustainable plan for the future of the airports and identified that Latin America could be a great contributor to this effort. He concluded that the next months will be crucial, however through continuous effort of international solidarity and collaboration the industry can face this great challenge.

As the moderator, **Jeff Poole**, *President of Hermes – Air Transport Organisation*, addressed to significance of such event due to the importance of air connectivity between the Latin American countries as well as

its significance for the distribution of the Covid-19 vaccine. He identified that external parties have great impact on the decision making process as well as new business models need to be adopted as the aviation environment influenced by several factors.

**Juan Carlos Salazar**, *Director General of Aeronautica Civil de Colombia*, initiated the event by addressing to three major factors which the industry need to rely in order to restore the confidence both from travellers as well as the authorities and these are: leadership, cooperation and good communication. Based on the CART's guidelines, he presented Colombia's plan to face the pandemic which consisted of the Recovery Plan and the Establishment of health protocols both for domestic and international travel. The holistic impact of the COVID-19 pandemic affected every air transport stakeholder, in different levels, however in order to face such great challenge the Latin American market needs to establish leadership and cooperation guidelines. He highlighted the need of implementation of certain guidelines for the harmonisation of several processes and decisions



## The Latin America Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency Through Leadership and Cooperation



**Jaime Binder**, Secretary General of Latin American Civil Aviation Commission (LACAC)



**José Ricardo Botelho**, Executive Director & CEO of ALTA

while he admitted that is vital for the industry to initiate joint actions with other sectors. Juan Carlos Salazar recognised that a viable recovery demands the participation of multiple partners, including people from the local governments. At last, Director General pointed out that the challenge for the industry is to implement CART's guidelines in order to create health corridors and reboot domestic and international traffic.

**Jaime Binder**, Secretary General of Latin American Civil Aviation Commission (LACAC) recognised that a global crisis demands global solutions. However, in the Latin American region authorities implement more nationalist, and not multilateral, approaches to face the pandemic. Moreover, the governments do not have the ability to support the air transport sector as others have extensively done. According to Jaime Binder, the multidimensional crisis has increased the lack of people's confidence as well as on the current situation nobody can guarantee any prediction regarding the end of the pandemic. He recognised the CART initiative as the main tool for the provision of guidelines and its

recommendations are vital for the recovery and future of the industry. At last, Secretary General identified sustainable aviation and technology as the main pillars which the industry can rely on for the recovery as well as the affordability of the air transport among the Latin American region. He also pointed out his optimism on the recovery of aviation and his trust on the system.

**José Ricardo Botelho**, Executive Director & CEO of ALTA first admitted that it's time for all parties to start cooperating but also identified the different approaches on both governmental as well as operational level. He highlighted the major importance of aviation for the Latin American-Caribbean region and its unique role to connect the different countries. The Executive Director & CEO of ALTA presented his strong belief that harmonisation of processes and strategies are fundamental for a viable future towards a post COVID-19 era. He mentioned that the industry has presented itself to safe and now it is time to properly communicate it. As the air transport sector represents 15% of the total GDP for the region, José Ricardo Botelho highlighted

## The Latin America Air Transport Sector in the Post COVID-19 Era: Resilience and Efficiency Through Leadership and Cooperation



**Dr Rafael Echevarne**, *Director General of ACI-LAC*

the importance of the implementation of COVID-19 passports, as well as Test, by pointing out the existing Latin American market experience from previous years. He concluded by mentioned that the tools which the industry has right now can be used to reach the light out of the darkness. The use of right information, the harmonised processes as well as the ICAO guidelines will provide a safer sector.

**Dr Rafael Echevarne**, *Director General of ACI-LAC* addressed to the heavy losses for the Latin American Airport sector, while he mentioned the essential character of aviation for the region. However, he mentioned that infrastructure remains a major challenge for the airports and the current situation does not provide any positive results so far. He discussed phenomenon of airports of two different shifts by highlighting the recovery of domestic and international capacity of certain airports of the region in addition with others. In contrast with the other speakers, Dr Rafael Echevarne identifies technology as the biggest ally towards recovery from the pandemic. Moreover, the



**Javier Vanegas**, *Director of Latin America and Caribbean Affairs, CANSO*

harmonisation of the processes still play crucial role on implementation of common actions and protocols. He stated that now is the opportunity for the industry to challenge the strict regimes towards air travel, when at the same time he totally supports an extended cooperation of all aviation stakeholders at a time when the industry has both the protocols as well as the guidelines to achieve this.

**Javier Vanegas**, *Director of Latin America and Caribbean Affairs, CANSO*, recognised the vital role of the airline industry during the difficult times of the pandemic. However, he mentioned the great amount of job losses as well as other impacts of the pandemic to the air transport industry. He referred to the provided policies and introduction of frameworks and guidelines for the aviation sector, in order to ensure its resilience. Mr Vanegas identified that nature of the industry is to adapt rapidly and establish collaborations for its viability and continuum. Although, Javier Vanegas addressed to the great impact of governmental decisions on the air travel which concluded to even more decline of the South American capacity.

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He concluded that air transport industry remains safe and this needs to be addressed to the world. The main goal has to be a joint effort between aviation stakeholders and regional governments.

**Jeff Peet**, *Managing Editor of América Latina Aeronoticias (ALA)* focused on the communication of the proper messages. He identified the strong effort that has been done both from the companies as well as the governments. He recognises technology as the key factor for safety and recovery, however he insisted on the definition of a common messaging strategy. He stated that the aviation industry needs to communicate the value of air transport beyond the tourism level. Furthermore, he addressed to the future of the industry which will be closely connected to sustainability. As part of the industry's future, environmental policies, inequality issues as well as social responsibility campaigns need to become part of aviation sector's new normality. He concludes referring to the crisis as an opportunity and that communication could be the right tool for harmonisation.



**Jeff Peet**, *Managing Editor of América Latina Aeronoticias (ALA)*

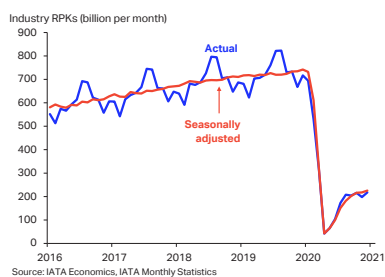
**Summarising what has been said, Juan Carlos Salazar highlighted the following outcomes:**

- **Recognition of efforts towards harmonisation with the CART guidelines**
- **Major challenges in the region demand effective implementation of strategies**
- **Reactivation of the air connectivity in the rest of the world in contrast with the Latin American region**
- **A global crisis requires harmonisation of the processes**
- **The help of the regional authorities is vital for the recovery of the industry**
- **Major capacity decrease in the region requires strong implementation of technology in the future**
- **The continuity of air connectivity is essential for Latin America**
- **The importance of communication in order to communicate the right message**

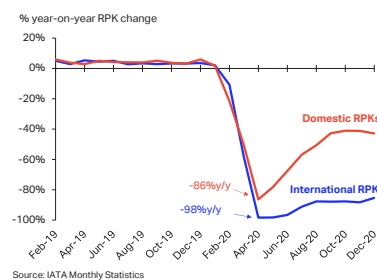


## DEC 2020: Air Passenger Market Analysis

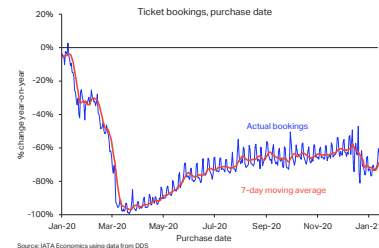
**Chart 1 – Air passenger volumes**



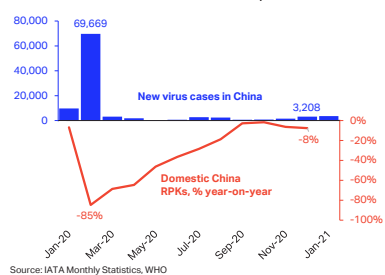
**Chart 2 – Year-on-year change in domestic and international RPKs, global level**



**Chart 3: Y/y change in net passenger bookings, global**



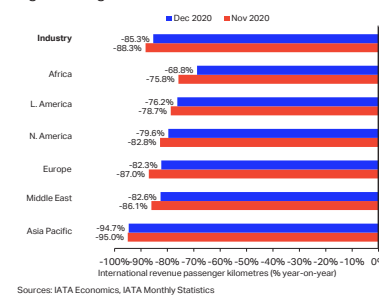
**Chart 4: COVID-19 and RPK developments in China**



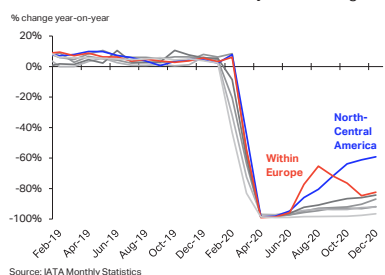
**Chart 5 – Passenger load factors by region**



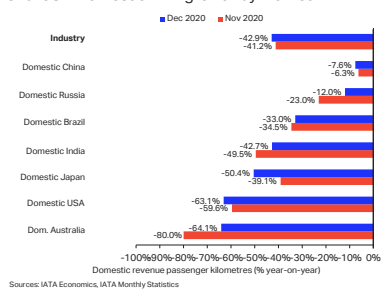
**Chart 6 – International RPK growth, yearly (airline region of registration basis)**



**Chart 7 – Growth in int'l RPKs by market segment**



**Chart 8 – Domestic RPK growth by market**



**Air passenger market detail - December 2020**

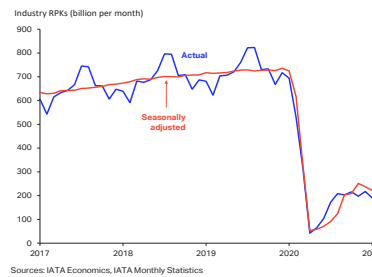
World share <sup>1</sup>	December 2020 (% year-on-year)					2020 calendar year (% year-on-year)				
	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>		
<b>TOTAL MARKET</b>	<b>100.0%</b>	<b>-68.7%</b>	<b>-56.7%</b>	<b>-24.6%</b>	<b>57.5%</b>	<b>-65.9%</b>	<b>-56.5%</b>	<b>-17.8%</b>	<b>64.8%</b>	
Africa	1.9%	-67.7%	-57.5%	-17.5%	54.9%	-68.8%	-61.0%	-14.4%	57.4%	
Asia Pacific	38.6%	-63.8%	-52.1%	-20.0%	61.6%	-61.9%	-53.9%	-14.3%	67.5%	
Europe	23.6%	-77.5%	-67.7%	-25.2%	57.8%	-69.9%	-62.1%	-17.4%	67.8%	
Latin America	5.7%	-57.3%	-51.8%	-9.3%	73.0%	-62.1%	-58.3%	-7.7%	74.9%	
Middle East	7.4%	-81.3%	-67.2%	-33.2%	44.0%	-72.2%	-63.3%	-18.5%	57.6%	
North America	22.7%	-68.9%	-48.5%	-33.8%	51.6%	-65.2%	-50.2%	-25.6%	59.2%	
<b>International</b>	<b>45.7%</b>	<b>-85.3%</b>	<b>-74.5%</b>	<b>-34.7%</b>	<b>47.0%</b>	<b>-75.6%</b>	<b>-68.1%</b>	<b>-19.2%</b>	<b>62.8%</b>	
Africa	1.6%	-68.8%	-57.6%	-19.0%	53.1%	-69.8%	-61.5%	-15.4%	55.9%	
Asia Pacific	11.0%	-94.7%	-86.4%	-49.7%	32.1%	-80.3%	-74.1%	-19.5%	61.4%	
Europe	18.5%	-82.3%	-72.2%	-30.4%	53.3%	-73.7%	-66.3%	-18.8%	66.9%	
Latin America	2.2%	-76.2%	-68.9%	-19.2%	62.7%	-71.8%	-67.7%	-10.4%	72.4%	
Middle East	6.9%	-82.6%	-68.7%	-34.3%	43.1%	-72.9%	-63.9%	-18.9%	57.3%	
North America	5.5%	-79.6%	-63.0%	-38.1%	46.6%	-75.4%	-65.5%	-23.9%	60.1%	
<b>Domestic</b>	<b>54.3%</b>	<b>-42.9%</b>	<b>-25.7%</b>	<b>-19.1%</b>	<b>63.7%</b>	<b>-48.8%</b>	<b>-35.7%</b>	<b>-17.0%</b>	<b>66.6%</b>	
Dom. Australia <sup>4</sup>	0.7%	-64.1%	-46.3%	-27.5%	55.4%	-69.5%	-62.8%	-14.7%	66.1%	
Domestic Brazil <sup>4</sup>	1.6%	-33.0%	-31.4%	-1.9%	82.1%	-49.0%	-47.4%	-2.4%	80.3%	
Dom. China P.R. <sup>4</sup>	19.9%	-7.6%	6.1%	-10.6%	71.2%	-30.8%	-19.7%	-11.7%	72.9%	
Domestic India <sup>4</sup>	2.1%	-42.7%	-28.3%	-17.7%	70.4%	-55.6%	-48.0%	-12.8%	74.6%	
Domestic Japan <sup>4</sup>	1.4%	-50.4%	-20.5%	-26.3%	43.5%	-53.6%	-32.7%	-22.9%	50.9%	
Dom. Russian Fed. <sup>4</sup>	3.4%	-12.0%	-11.2%	-0.7%	77.1%	-23.5%	-12.6%	-10.3%	72.9%	
Domestic US <sup>4</sup>	16.6%	-63.1%	-40.8%	-32.4%	53.5%	-59.6%	-41.4%	-26.4%	58.8%	

<sup>1</sup>% of industry RPKs in 2020 <sup>2</sup>Year-on-year change in load factor <sup>3</sup>Load factor level  
<sup>4</sup>Note: the seven domestic passenger markets for which broken-down data are available accounted for 46% of global total RPKs and approximately 84% of total domestic RPKs in 2020  
 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

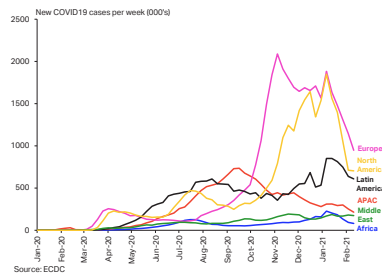


# JAN 2021: Air Passenger Market Analysis

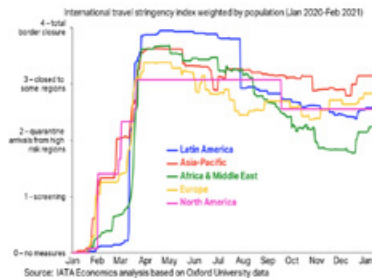
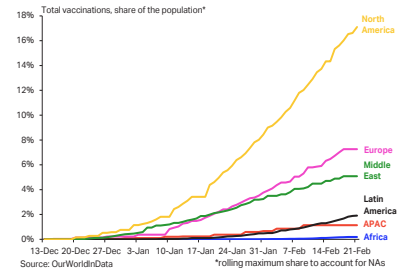
**Chart 1 – Air passenger volumes**



**Chart 2 – New COVID cases by region**

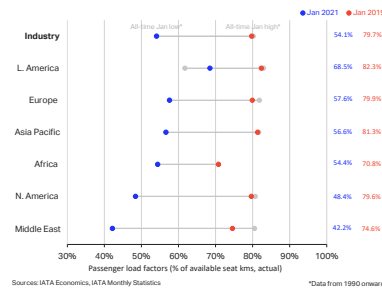


**Chart 3: Vaccine doses administered by region**

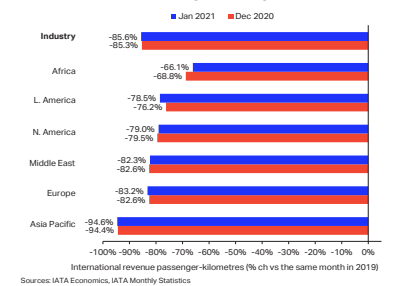


**Load factors fall again as carriers struggle to adjust**

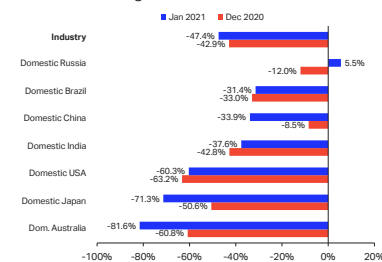
**Chart 5 – Passenger load factors by region**



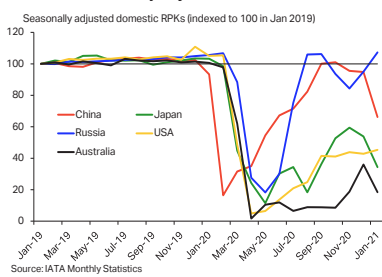
**Chart 6 – International RPK growth versus the same month in 2019 (airline region of registration basis)**



**Chart 7 – Domestic RPK growth versus the same month in 2019, registration basis**



**Chart 8 – Seasonally adjusted domestic RPK markets**



**Air passenger market detail - January 2021**

To aid understanding, the table includes both % comparisons with pre-crisis 2019 months and 2020 months.

World share <sup>1</sup>	January 2021 (% ch vs the same month in 2019)				January 2021 (% year-on-year, 2020)				
	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	
<b>TOTAL MARKET</b>	<b>-72.0%</b>	<b>-58.7%</b>	<b>-25.7%</b>	<b>54.1%</b>	<b>-72.5%</b>	<b>-59.3%</b>	<b>-26.0%</b>	<b>54.1%</b>	
Africa	1.0%	-63.9%	-53.0%	-16.4%	54.4%	-66.0%	-56.0%	-15.9%	54.4%
Asia Pacific	38.0%	-71.5%	-59.0%	-24.8%	56.6%	-71.4%	-59.8%	-23.1%	56.6%
Europe	23.7%	-77.4%	-68.7%	-22.4%	57.6%	-77.7%	-68.3%	-24.2%	57.6%
Latin America	5.7%	-58.0%	-49.5%	-13.9%	68.5%	-58.2%	-49.6%	-14.2%	68.5%
Middle East	7.4%	-80.7%	-65.8%	-32.4%	42.2%	-81.7%	-66.0%	-36.3%	42.2%
North America	22.7%	-67.5%	-46.5%	-31.2%	48.4%	-69.0%	-48.5%	-31.9%	48.4%
<b>International</b>	<b>-45.7%</b>	<b>-85.6%</b>	<b>-74.4%</b>	<b>-35.0%</b>	<b>44.9%</b>	<b>-85.9%</b>	<b>-74.5%</b>	<b>-36.2%</b>	<b>44.9%</b>
Africa	1.6%	-66.1%	-54.2%	-18.4%	52.3%	-68.1%	-57.0%	-18.3%	52.3%
Asia Pacific	11.0%	-94.6%	-86.5%	-49.4%	32.6%	-94.7%	-86.8%	-48.8%	32.6%
Europe	18.5%	-83.2%	-73.6%	-29.2%	51.4%	-83.3%	-73.1%	-31.5%	51.4%
Latin America	2.2%	-78.5%	-67.9%	-27.2%	55.3%	-77.7%	-66.6%	-27.6%	55.3%
Middle East	6.9%	-82.3%	-67.6%	-33.9%	40.8%	-83.2%	-67.7%	-37.6%	40.8%
North America	5.5%	-79.0%	-60.5%	-37.8%	42.9%	-79.1%	-61.2%	-38.8%	42.9%
<b>Domestic</b>	<b>54.3%</b>	<b>-47.4%</b>	<b>-30.5%</b>	<b>-19.3%</b>	<b>60.1%</b>	<b>-48.3%</b>	<b>-32.7%</b>	<b>-18.2%</b>	<b>60.1%</b>
Dom. Australia <sup>4</sup>	0.7%	-81.6%	-77.8%	-13.3%	64.8%	-81.7%	-77.1%	-16.1%	64.8%
Domestic Brazil <sup>4</sup>	1.6%	-31.4%	-29.4%	-2.4%	81.6%	-32.8%	-29.5%	-4.1%	81.6%
Dom. China P.R. <sup>4</sup>	79.0%	-33.9%	-15.1%	-18.2%	64.0%	-29.1%	-14.9%	-12.7%	64.0%
Domestic India <sup>4</sup>	2.1%	-37.6%	-22.5%	-16.8%	69.3%	-38.5%	-23.6%	-16.8%	69.3%
Domestic Japan <sup>4</sup>	1.5%	-71.3%	-39.9%	-35.0%	31.9%	-72.3%	-40.8%	-36.3%	31.9%
Dom. Russian Fed. <sup>4</sup>	3.4%	5.5%	-0.7%	4.7%	80.1%	1.2%	-8.4%	7.5%	80.1%
Domestic US <sup>4</sup>	16.6%	-60.3%	-47.8%	-28.7%	50.5%	-62.6%	-41.0%	-29.2%	50.5%

<sup>1</sup>% of industry RPKs in 2020

<sup>2</sup>Change in load factor vs same month in 2019

<sup>3</sup>Load factor level

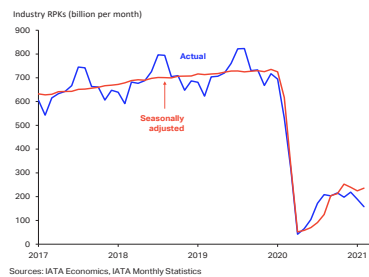
<sup>4</sup>Note: the seven domestic passenger markets for which broken-down data are available account for approximately 46% of global total RPKs and 84% of total domestic RPKs

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.

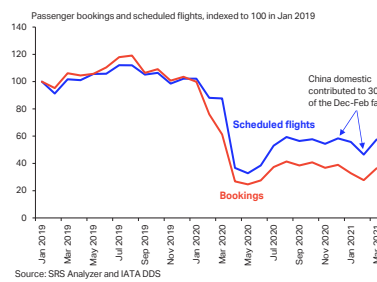


# FEB 2021: Air Passenger Market Analysis

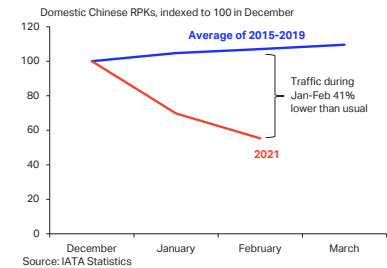
**Chart 1 – Air passenger volumes**



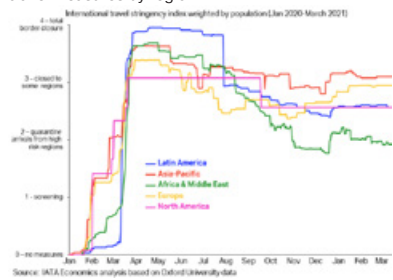
**Chart 2 – Trends in passenger bookings and flights**



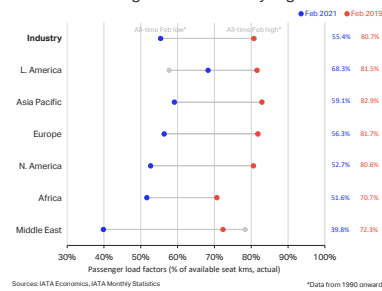
**Chart 3: Domestic RPKs in China around Chunyun**



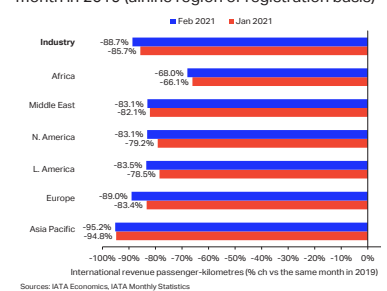
**Chart 4: Stringency of government international air travel measures by region**



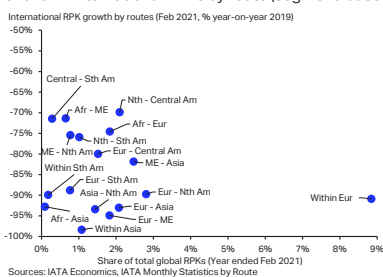
**Chart 5 – Passenger load factors by region**



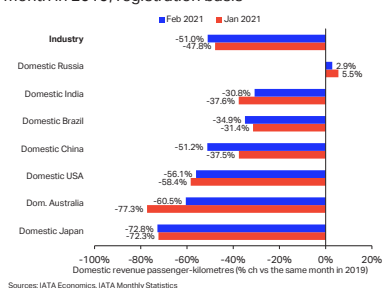
**Chart 6 – International RPK growth versus the same month in 2019 (airline region of registration basis)**



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



**Chart 8 – Domestic RPK growth versus the same month in 2019, registration basis**



**Air passenger market detail - February 2021**

To aid understanding, the table includes both % comparisons with pre-crisis 2019 months and 2020 months.

	February 2021 (% ch vs the same month in 2019)					February 2021 (% year-on-year, 2020)				
	World share <sup>1</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	RPK	ASK	PLF (%-pt) <sup>2</sup>	PLF (level) <sup>3</sup>	
<b>TOTAL MARKET</b>	100.0%	-74.7%	-63.1%	-25.3%	55.4%	-70.3%	-69.3%	-20.4%	55.4%	
Africa	0.0%	-66.1%	-53.6%	-19.0%	51.6%	-65.8%	-55.9%	-15.1%	51.6%	
Asia Pacific	38.6%	-74.9%	-64.8%	-23.8%	59.1%	-56.7%	-50.1%	-9.0%	59.1%	
Europe	23.6%	-82.8%	-75.0%	-25.4%	56.3%	-82.8%	-75.2%	-25.1%	56.3%	
Latin America	5.7%	-62.4%	-55.1%	-13.2%	68.3%	-63.8%	-56.6%	-13.2%	68.3%	
Middle East	7.4%	-81.7%	-66.8%	-32.5%	39.8%	-82.0%	-67.3%	-32.6%	39.8%	
North America	22.2%	-66.1%	-48.1%	-27.9%	52.7%	-67.2%	-50.3%	-27.3%	52.7%	
<b>International</b>	45.7%	-88.7%	-77.9%	-38.8%	40.8%	-87.3%	-76.5%	-34.7%	40.8%	
Africa	1.6%	-68.0%	-54.6%	-20.5%	49.1%	-67.5%	-56.6%	-16.4%	49.1%	
Asia Pacific	10.9%	-95.2%	-87.5%	-50.0%	31.1%	-93.0%	-84.7%	-37.0%	31.1%	
Europe	18.5%	-89.0%	-80.5%	-36.0%	46.4%	-89.0%	-80.5%	-35.8%	46.4%	
Latin America	2.2%	-83.5%	-75.4%	-26.7%	54.6%	-83.5%	-75.4%	-26.7%	54.6%	
Middle East	7.0%	-83.1%	-68.6%	-33.4%	39.0%	-83.3%	-69.0%	-33.5%	39.0%	
North America	5.4%	-83.1%	-63.9%	-41.9%	36.7%	-82.4%	-62.8%	-41.1%	36.7%	
<b>Domestic</b>	54.3%	-51.0%	-37.1%	-18.3%	64.3%	-37.5%	-25.8%	-12.0%	64.3%	
Dom. Australia <sup>4</sup>	0.7%	-60.5%	-59.4%	-2.1%	75.8%	-59.2%	-59.0%	-0.4%	75.8%	
Domestic Brazil <sup>4</sup>	1.6%	-34.9%	-30.3%	-5.4%	77.0%	-37.3%	-33.2%	-5.0%	77.0%	
Dom. China P.R. <sup>4</sup>	19.9%	-51.2%	-34.7%	-22.2%	65.5%	220.1%	130.2%	18.4%	65.5%	
Domestic India <sup>4</sup>	2.1%	-30.8%	-17.5%	-14.4%	74.9%	-35.9%	-24.7%	-13.0%	74.9%	
Domestic Japan <sup>4</sup>	1.4%	-72.8%	-59.4%	-23.7%	48.1%	-72.1%	-60.9%	-19.3%	48.1%	
Dom. Russian Fed. <sup>4</sup>	3.4%	2.9%	-5.4%	6.7%	83.4%	-4.5%	-13.3%	7.7%	83.4%	
Domestic US <sup>4</sup>	16.6%	-56.1%	-38.3%	-23.5%	58.0%	-59.3%	-43.2%	-22.9%	58.0%	

<sup>1</sup> % of industry RPKs in 2020

<sup>2</sup> Change in load factor vs same month in 2019

<sup>3</sup> Load factor level

<sup>4</sup> Note: the seven domestic passenger markets for which broken-down data are available account for approximately 46% of global total RPKs and 84% 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.



ICAO

# ECONOMIC DEVELOPMENT

## OCT 2020: Air Transport Monthly Monitor

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

Air Transport Bureau  
E-mail: [ecd@icao.int](mailto:ecd@icao.int)

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

### GLOBAL KEY FIGURES

**OCT 2020**  
(versus OCT 2019)

**RPK** ▼ -70.6% **ASK** ▼ -59.9% **FTK** ▼ -6.2% **LF**: 60.2% ▲ +0.1 pt

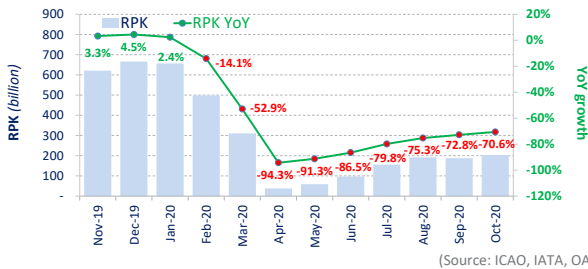
**OUTLOOK\* - NOV 2020**  
(versus NOV 2019)

**ASK** ▼ -58.1% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

World passenger traffic fell by -70.6% YoY in October 2020, +2.2 percentage points up from the decline in the previous month. The pace of recovery moderated further amid the resurgent epidemics and stricter containment measures. Europe was the main contributor to the moderation, being the only region with deteriorated traffic decline. On the contrary, Africa and Latin America/Caribbean have shown more resilience. Domestic travel in China demonstrated the best performance with traffic recovering to nearly pre-pandemic levels.

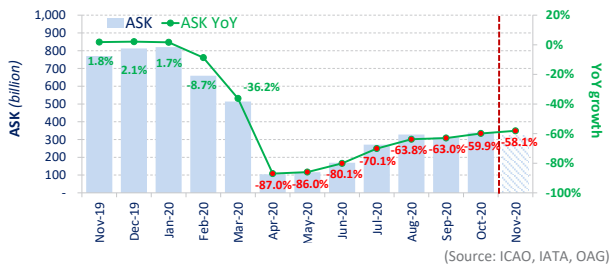


### CAPACITY

#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -59.9% YoY in October 2020, +3.1 percentage points up from the decline in the previous month (-63.0%).

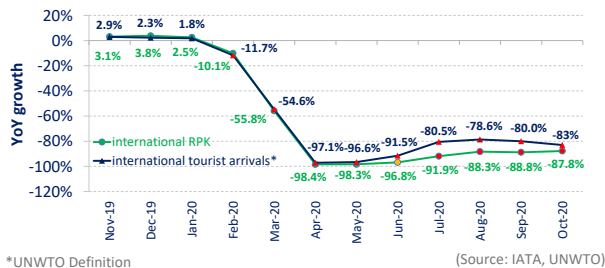
In light of the renewed outbreaks, airlines' resumption of operations is likely to slow down, and the contraction in world capacity in November is expected to be at -58.1% YoY.



#### International Traffic vs. Tourist Arrivals

International passenger traffic fell by -87.8% YoY in October 2020, +1.0 percentage point up from the decline in the previous month. Improvements in international travel continued to be insignificant with subdued demand and ongoing cross-border travel restrictions across all regions.

The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.

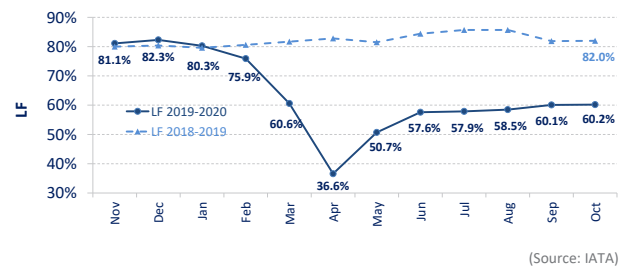


\* UNWTO Definition

#### Load Factor - LF

The passenger Load Factor reached 60.2% in October 2020, +0.1 percentage point higher than the previous month.

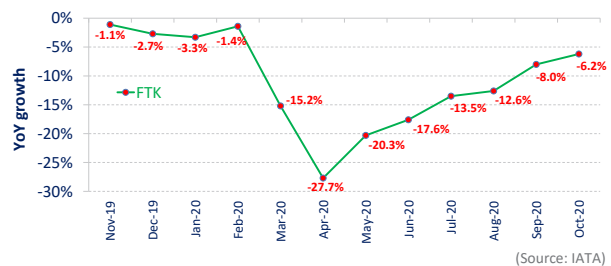
As the fall in air travel demand was still deeper than capacity cut, the October LF was -21.8 percentage points lower than the rate in the same period of 2019.



### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -6.2% YoY in October 2020, +1.8 percentage points up from the fall in the previous month. Demand in air cargo continued to recover significantly faster than air travel demand, despite at a slightly eased pace. The main cause of the overall moderation was the softening in North America and Africa, particularly in the latter. Nevertheless, the two regions remained as the strongest performing ones and have returned to pre-crisis levels since September. Moreover, the recovery in the Middle East stalled, affected by a weaker demand to/from Africa. Improvements were recorded by the remaining regions with a particularly brisk upswing in Latin America/Caribbean.



**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.

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ICAO

# ECONOMIC DEVELOPMENT

## OCT 2020: Air Transport Monthly Monitor

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

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

OCT 2020: -28.1%, -36.9%, and +6.2% YoY in terms of aircraft departures, passengers and freight for the Top 15

OCT 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)	23,680	-38.1%	Guangzhou, CN (CAN)	2,473,198	-22.1%	Memphis TN, US (MEM)	410,851	8.9%
Dallas/Fort Worth TX, US (DFW)	22,750	-26.8%	Chengdu, CN (CTU)	2,405,190	-1.1%	Hong Kong SAR, CN (HKG)	400,000	-4.6%
Chicago IL, US (ORD)	21,919	-47.0%	Beijing, CN (PEK)	2,217,211	-48.7%	Shanghai, CN (PVG)	331,799	3.2%
Denver CO, US (DEN)	19,756	-29.2%	Shenzhen, CN (SZX)	2,122,981	-7.9%	Anchorage AK, US (ANC)	302,452	+26.4%
Guangzhou, CN (CAN)	19,460	-7.3%	Shanghai, CN (PVG)	1,950,355	-37.9%	Incheon, KR (ICN)	253,690	5.8%
Shanghai, CN (PVG)	17,824	-17.3%	Dallas/Fort Worth TX, US (DFW)	1,908,009	-40.2%	Louisville KY, US (SDF)	249,513	4.9%
Charlotte NC, US (CLT)	17,280	-31.8%	Shanghai, CN (SHA)	1,889,753	-6.2%	Taipei, CN (TPE)	223,572	14.6%
Shenzhen, CN (SZX)	16,113	2.1%	Atlanta GA, US (ATL)	1,794,660	-62.3%	Doha, QA (DOH)	208,771	6.1%
Chengdu, CN (CTU)	16,089	3.0%	Xi'an, CN (XIY)	1,793,609	-12.6%	Los Angeles CA, US (LAX)	200,684	+15.8%
Phoenix AZ, US (DVT)	15,843	-21.6%	Kunming, CN (KMG)	1,771,971	-11.8%	Chicago IL, US (ORD)	193,549	22.5%
Beijing, CN (PEK)	15,064	-40.0%	Hangzhou, CN (HGH)	1,675,790	-5.3%	Dubai, AE (DXB)	190,635	-13.4%
Los Angeles CA, US (LAX)	14,691	-49.1%	Denver CO, US (DEN)	1,657,486	-45.4%	Miami FL, US (MIA)	188,963	9.4%
Kunming, CN (KMG)	14,220	-4.0%	Charlotte NC, US (CLT)	1,384,095	-37.4%	Tokyo, JP (NRT)	182,426	4.1%
Phoenix AZ, US (AZA)	13,241	-23.4%	Tokyo, JP (HND)	1,333,129	-63.7%	Frankfurt, DE (FRA)	174,080	3.4%
Seattle WA, US (SEA)	13,188	-31.2%	Chicago IL, US (ORD)	1,277,707	-66.1%	Guangzhou, CN (CAN)	158,591	-1.6%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of aircraft departures, the Top 15 airports reported a combined fall of -28.1% YoY. For the second consecutive month, positive growth was observed in the Top 15 with two airports in China, **Shenzhen** and **Chengdu**, increasing at +2.1% and +3.0%, respectively. **Atlanta** ranked 1st with -38.1% decline, followed by **Chicago** and **Dallas/Fort Worth**.

In terms of passengers, all the Top 15 airports posted a total fall of -36.9% YoY. Although YoY increase observed in the previous month disappeared, several Chinese airports have seen traffic returning closely to pre-crisis levels. Airports in China and US continue to dominate the Top 15 list with **Guangzhou** retaining the 1st place. **Tokyo** overtook **Antalya** and returned to the Top 15.

In terms of freight, the Top 15 airports reported a YoY increase of +6.2%. This was the fifth consecutive growth since June with majority of the Top 15 posting YoY increase. The strongest expansion was recorded by **Anchorage** (+26.4%) and **Chicago** (+22.5%). Three airports, **Hong Kong**, **Dubai** and **Guangzhou** were the only ones posting declines.

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

OCT 2020: -60.7% YoY in terms of RPK for the Top 15

OCT 20

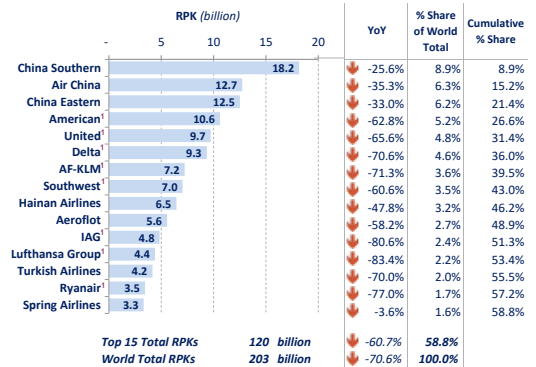
In terms of RPK, the Top 15 airline groups accounted for 58.8% of the world's total RPK in October 2020 and declined by -60.7% YoY. This decline was 9.9 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

Same airlines as in the previous month claimed the Top 15 albeit with diverging recovery pace. All in all, airlines with larger domestic markets appeared to be more resilient.

Chinese airlines continued to lead the chart and posted considerably smaller declines. **China Southern**, **Air China**, and **China Eastern** maintained the Top 3 with traffic returning to over 60% of 2019 levels. Two other airlines, **Hainan Airlines** and **Spring Airlines**, ranked at 9th and 15th, respectively; and the latter also recorded the fastest recovery among the Top 15 with a moderate decline of -3.6%.

Following the Top 3 Chinese airlines were the three major US airlines, i.e. **American**, **United** and **Delta** whose traffic declined ranging from -60 to -70%. **Southwest** improved two positions to 8th with a slightly faster recovery among the US airlines.

Marginal improvements were recorded by airlines in Europe, nevertheless, **AF-KLM** climbed up two positions to 7th outperforming other airlines in the region. In contrast, both **Aeroflot** and **Ryanair** were down two positions respectively to 10th and 14th, posting deteriorated declines, particularly for **Aeroflot** due to the slowdown in domestic traffic recovery.

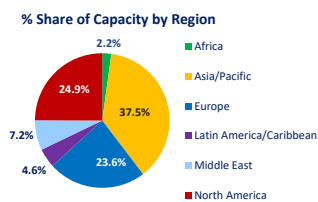


(Source: ICAO, airlines' websites)

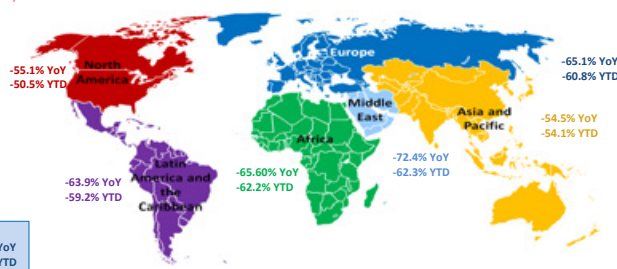
Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

OCT 2020: -59.9% YoY in terms of World ASK



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



Worldwide capacity contracted by -59.9% YoY in October 2020.

Capacity were added in all regions with the exception in Europe which has seen further cut in response to the spike in COVID-19 cases and more restricted cross-border travel.

North America and Asia/Pacific showed the fastest recovery in capacity, while Latin America/Caribbean and Africa recorded the biggest improvements compared to the previous month.

\* 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.





ICAO

# ECONOMIC DEVELOPMENT

## NOV 2020: Air Transport Monthly Monitor

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

Air Transport Bureau  
E-mail: [ecd@icao.int](mailto:ecd@icao.int)

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

### GLOBAL KEY FIGURES

**NOV 2020**  
(versus NOV 2019)

**RPK** ▼ -70.3% **ASK** ▼ -58.6% **FTK** ▼ -6.6% **LF**: 58.0% ▼ -2.2 pt

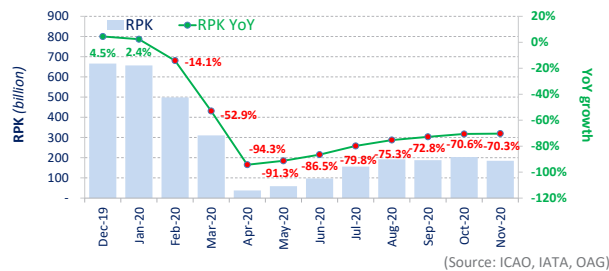
**OUTLOOK\* - DEC 2020**  
(versus NOV 2019)

**ASK** ▼ -55.7% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

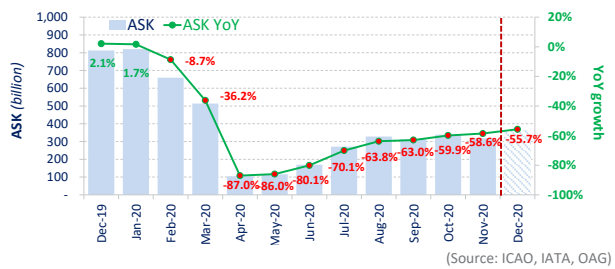
World passenger traffic fell by -70.3% YoY in November 2020, +0.3 percentage point up from the decline in the previous month. Air travel recovery was hampered by the resurgence in outbreaks and the resulting reimposition of restrictions. The impact on regions was a mix. Whereas Europe recorded a deterioration in traffic, other regions ticked up somewhat with Latin America/Caribbean showing the fastest improvements. Domestic travel recovery in China continued to be the best performing market albeit with a slight slowdown.



### CAPACITY

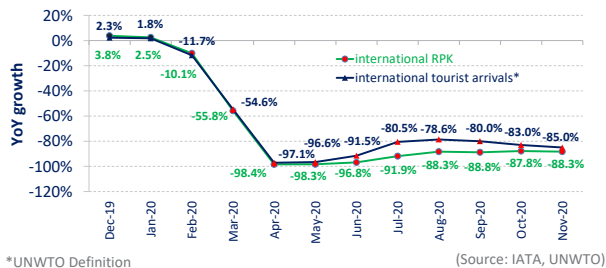
#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -58.6% YoY in November 2020, +1.3 percentage points up from the decline in the previous month (-59.9%). Approaching the end of year travel period, airlines are expected to add more capacity. As a result, capacity contraction in December would ease to -55.7% YoY.



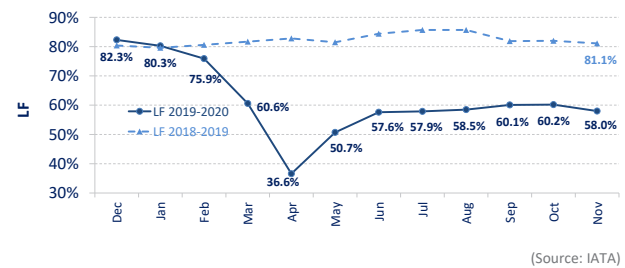
#### International Traffic vs. Tourist Arrivals

International passenger traffic fell by -88.3% YoY in November 2020, -0.5 percentage point down from the decline in the previous month. Recovery in international travel further weakened mainly due to the larger fall in Intra-Europe traffic. The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.



#### Load Factor - LF

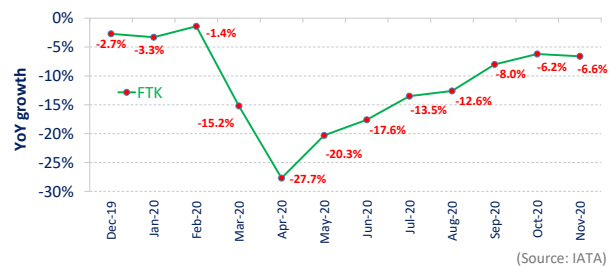
The passenger Load Factor reached 58.0% in November 2020, -2.2 percentage points lower than the previous month. As the decline in air travel demand was deeper than capacity cut, the November LF was -23.1 percentage points lower than the rate in the same period of 2019.



### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -6.6% YoY in November 2020, -0.4 percentage point down from the fall in the previous month. Air cargo recovery softened slightly as the virus resurgence had affected demand in certain markets. On the other hand, demand in air cargo in November also benefitted from the peak e-commerce events such as Black Friday and Double 11. Overall, recovery in air cargo stalled since the improvements in Asia/Pacific were offset by the setbacks in other regions, particularly in Latin America/Caribbean and Europe. Nevertheless, expectations for December remains optimistic as the economic recovery will likely continue and the consumer consumption during holiday shopping season will also be supportive.



**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.

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ICAO

# ECONOMIC DEVELOPMENT

## NOV 2020: Air Transport Monthly Monitor

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

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

NOV 2020: -25.3%, -38.4%, and +6.0% YoY in terms of aircraft departures, passengers and freight for the Top 15

NOV 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)	24,531	-30.9%	Guangzhou, CN (CAN)	2,506,689	-19.3%	Hong Kong SAR, CN (HKG)	431,000	-2.1%
Dallas/Fort Worth TX, US (DFW)	22,519	-24.3%	Chengdu, CN (CTU)	2,164,602	-5.8%	Memphis TN, US (MEM)	378,049	6.6%
Chicago IL, US (ORD)	21,652	-42.5%	Beijing, CN (PEK)	2,045,021	-49.1%	Shanghai, CN (PVG)	349,174	3.3%
Guangzhou, CN (CAN)	20,139	-2.5%	Shenzhen, CN (SZX)	1,971,530	-10.9%	Anchorage AK, US (ANC)	300,748	+19.3%
Denver CO, US (DEN)	19,765	-21.5%	Atlanta GA, US (ATL)	1,743,955	-59.9%	Incheon, KR (ICN)	256,470	5.5%
Charlotte NC, US (CLT)	16,323	-32.3%	Kunming, CN (KMG)	1,721,439	-10.2%	Louisville KY, US (SDF)	233,710	3.8%
Beijing, CN (PEK)	16,078	-34.2%	Dallas/Fort Worth TX, US (DFW)	1,706,587	-43.1%	Taipei, CN (TPE)	219,270	10.7%
Shenzhen, CN (SZX)	15,517	-1.7%	Shanghai, CN (SHA)	1,601,236	-17.6%	Doha, QA (DOH)	207,849	4.8%
Los Angeles CA, US (LAX)	15,375	-43.7%	Tokyo, JP (HND)	1,540,025	-59.3%	Chicago IL, US (ORD)	203,850	+35.6%
Chengdu, CN (CTU)	15,180	0.6%	Hangzhou, CN (HGH)	1,501,558	-7.4%	Los Angeles CA, US (LAX)	197,835	15.5%
Shanghai, CN (PVG)	15,167	-26.7%	Denver CO, US (DEN)	1,434,346	-45.9%	Tokyo, JP (NRT)	195,932	3.1%
Phoenix AZ, US (DVT)	15,008	-18.2%	New Delhi, IN (DEL)	1,253,324	-60.4%	Miami FL, US (MIA)	192,653	10.0%
Kunming, CN (KMG)	13,847	-2.7%	Shanghai, CN (PVG)	1,240,550	-58.3%	Dubai, AE (DXB)	188,109	-14.4%
Phoenix AZ, US (PHX)	13,531	-25.7%	Xi'an, CN (XIY)	1,214,297	-35.4%	Frankfurt, DE (FRA)	186,497	6.0%
Seattle WA, US (SEA)	12,786	-28.4%	Jeju, KR (CJU)	1,190,418	-12.5%	Guangzhou, CN (CAN)	165,782	0.1%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of aircraft departures, the Top 15 airports reported a combined fall of -25.3% YoY. The Top 15 list was still dominated by US and Chinese airports. Chengdu became the only airport reporting positive growth (+0.6%), and for the third consecutive month. Atlanta ranked 1st with -30.9% decline, followed by Dallas/Fort Worth and Chicago.

In terms of passengers, the Top 15 airports posted a total fall of -38.4% YoY. The majority of the Top 15 airports were in Asia/Pacific, with over half being Chinese airports. Guangzhou retained the 1st place, followed by Chengdu and Beijing. Significant improvement was observed in Tokyo supported by the domestic Go To Travel campaign. New Delhi, Jeju and three US airports also ranked in the Top 15.

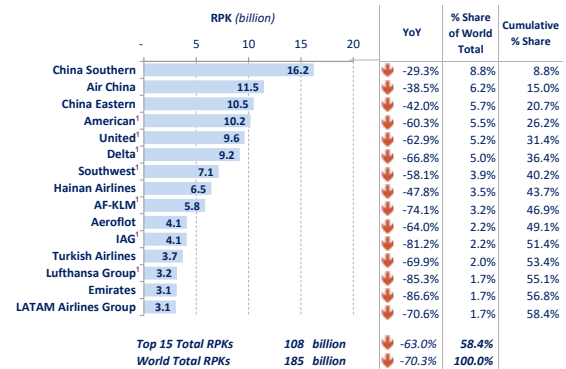
In terms of freight, the Top 15 airports reported a YoY increase of +6.0%, recording sixth consecutive monthly growth since June. Only two airports, Hong Kong and Dubai, posted declines. The former, however, overtook Memphis and became 1st. The strongest expansion was recorded by Chicago (+35.6%), followed by Anchorage (+19.3%).

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

NOV 2020: -63.0% YoY in terms of RPK for the Top 15

NOV 20

In terms of RPK, the Top 15 airline groups accounted for 58.4% of the world's total RPK in November 2020 and declined by -63.0% YoY. This decline was 7.3 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.



Top 15 ranking fluctuated in the month of November due to the uneven impact of the renewed outbreaks on air travel recovery across regions.

China Southern, Air China, and China Eastern retained the Top 3 positions and demonstrated the most resilience within the Top 15, albeit with slight moderation. Hainan Airlines climbed up one position to 8th while maintaining a similar level of traffic as the previous month.

Four US airlines, American, United, Delta and Southwest, occupied the places of 4th to 7th, with YoY traffic decline ranging from -58 to -67% – slight improvements from October owing to the increased travel during Thanksgiving holidays. Southwest ranked one position up to 7th, improving faster than the other three US airlines.

Airlines in Europe saw further deterioration in traffic recovery, impacted by the surge in COVID-19 cases and the associated more strict measures. Five airlines in the region ranked between 9th and 13th. AF-KLM dropped two positions to 9th, whereas the others stayed relatively stable.

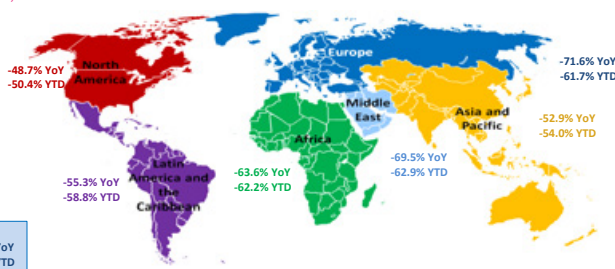
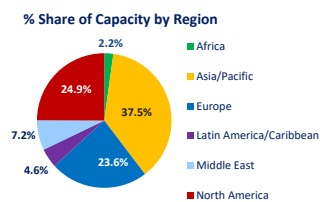
For the first time since April 2020, Emirates and LATAM reappeared in the Top 15, and ranked at 14th and 15th, respectively.

(Source: ICAO, airlines' websites)

Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

NOV 2020: -58.6% YoY in terms of World ASK



Worldwide capacity contracted by -58.6% YoY in November 2020. All regions saw increases in capacity, except for Europe where further reduction was shown, severely impacted by the elevated infection rates.

The fastest increase in capacity was recorded by Latin America/Caribbean and North America; the latter also showed the smallest capacity declines among all regions.

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

\* 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.



ICAO

# ECONOMIC DEVELOPMENT

## DEC 2020: Air Transport Monthly Monitor

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

Air Transport Bureau  
E-mail: [ecd@icao.int](mailto:ecd@icao.int)

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

### GLOBAL KEY FIGURES

**DEC 2020**  
(versus DEC 2019)

**RPK** ▼ -69.7% **ASK** ▼ -56.7% **FTK** ▼ -0.5% **LF**: 57.5% ▼ -0.5 pt

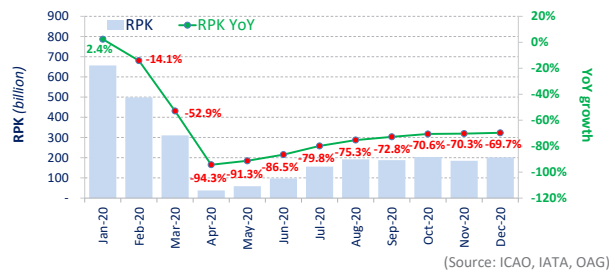
**OUTLOOK\* - JAN 2021**  
(versus JAN 2020)

**ASK** ▼ -58.0% \* Source OAG

### PASSENGER TRAFFIC

#### Revenue Passenger-Kilometres - RPK

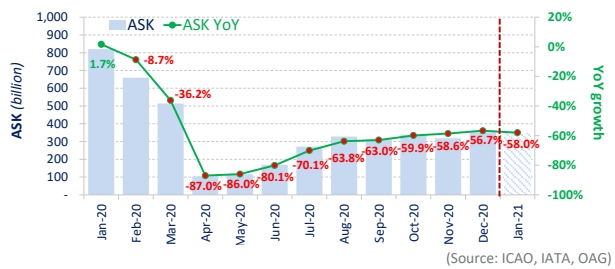
World passenger traffic fell by -69.7% YoY in December 2020, +0.6 percentage point up from the decline in the previous month. Elevated COVID-19 cases and the resulting travel restrictions continued to weigh on air travel. Subsequent to the initial rebound from the lowest point in April throughout the summer, passenger traffic recovery has stalled with several months of moderate improvements. For 2020 as whole, total number of passengers was down -60% YoY to 1.8 billion, back to 2003 levels. China domestic traffic demonstrated the swiftest recovery among all markets.



### CAPACITY

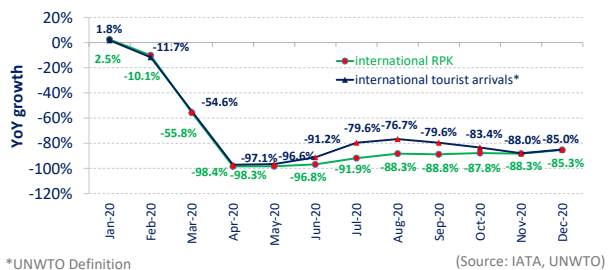
#### Available Seat-Kilometres - ASK

Capacity worldwide fell by -56.7% YoY in December 2020, +1.9 percentage points up from the decline in the previous month (-58.6%). In response to the renewed outbreaks across the world and ease of peak holiday travel, capacity decline in January 2021 is expected to accelerate to -58.0% YoY.



#### International Traffic vs. Tourist Arrivals

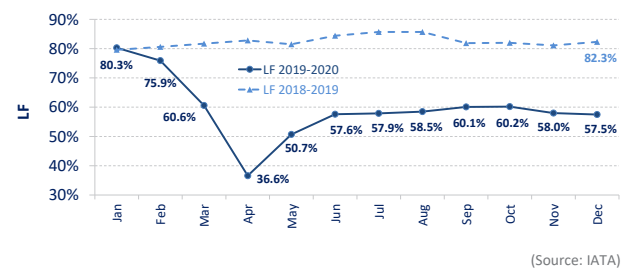
International passenger traffic fell by -85.3% YoY in December 2020, +3.0 percentage points up from the decline in the previous month. There has been no clear signs of improvement in international travel since the peak of crisis in April. Number of international passengers in 2020 was far below 2019 levels, and was down -74% YoY. The international tourist arrivals also remained stagnant and followed a similar trend as international passenger traffic.



\* UNWTO Definition

#### Load Factor - LF

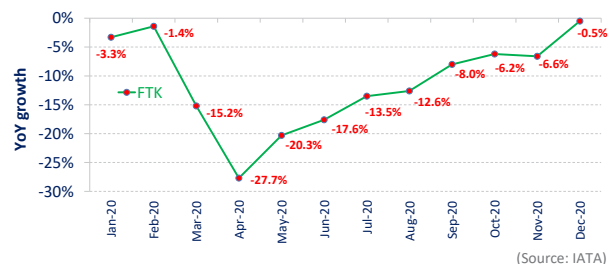
The passenger Load Factor reached 57.5% in December 2020, -0.5 percentage point lower than the previous month. As the decline in air travel demand was faster than capacity cut, the December LF was -24.8 percentage points lower than the rate in the same period of 2019.



### FREIGHT TRAFFIC

#### Freight Tonne-Kilometres - FTK

World freight traffic reported a decline of -0.5% YoY in December 2020, +6.1 percentage points up from the fall in the previous month. December marked another month of robust rebound in air cargo with traffic recovering to over 99% of the pre-crisis levels. In contrast to the depressed air travel, cargo traffic recovered swiftly benefiting from the continued demand for goods and supplies during the pandemic. Overall, air cargo traffic fell by -10.6% YoY in 2020, much lower than the decline in passenger traffic. Solid improvements were observed in all regions, specifically in Africa and North America, where traffic have already bounced back to 2019 levels and achieved positive growth.



**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.

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ICAO

# ECONOMIC DEVELOPMENT

## DEC 2020: Air Transport Monthly Monitor

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

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

DEC 2020: -26.6%, -41.3%, and +8.0% YoY in terms of aircraft departures, passengers and freight for the Top 15

DEC 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)	26,127	-29.5%	Guangzhou, CN (CAN)	2,433,024	-22.9%	Hong Kong SAR, CN (HKG)	437,000	0.9%
Dallas/Fort Worth TX, US (DFW)	23,982	-22.0%	Shenzhen, CN (SZX)	1,915,639	-15.8%	Memphis TN, US (MEM)	426,525	22.1%
Chicago IL, US (ORD)	21,302	-44.9%	Beijing, CN (PEK)	1,842,361	-54.8%	Shanghai, CN (PVG)	354,104	-0.7%
Guangzhou, CN (CAN)	20,734	-1.8%	Atlanta GA, US (ATL)	1,794,223	-60.5%	Louisville KY, US (SDF)	303,132	3.6%
Denver CO, US (DEN)	20,326	-24.6%	Dallas/Fort Worth TX, US (DFW)	1,760,257	-44.9%	Anchorage AK, US (ANC)	277,283	21.7%
Charlotte NC, US (CLT)	17,363	-29.2%	Kunming, CN (KMG)	1,724,022	-8.4%	Incheon, KR (ICN)	264,391	14.8%
Los Angeles CA, US (LAX)	16,499	-43.9%	Xi'an, CN (XIY)	1,606,284	-14.8%	Taipei, CN (TPE)	235,959	16.5%
Beijing, CN (PEK)	16,030	-35.6%	Shanghai, CN (SHA)	1,595,046	-17.3%	Doha, QA (DOH)	209,474	7.4%
Shenzhen, CN (SZX)	15,767	-2.8%	Denver CO, US (DEN)	1,581,594	-45.4%	Tokyo, JP (NRT)	207,469	14.3%
Phoenix AZ, US (DVT)	14,769	-18.0%	New Delhi, IN (DEL)	1,453,468	-53.9%	Los Angeles CA, US (LAX)	202,333	20.6%
Phoenix AZ, US (PHX)	14,110	-28.9%	Hangzhou, CN (HGH)	1,418,626	-9.7%	Dubai, AE (DXB)	192,974	-11.9%
Kunming, CN (KMG)	14,050	-3.0%	Chengdu, CN (CTU)	1,356,744	-41.1%	Miami FL, US (MIA)	190,149	11.7%
Tokyo, JP (HND)	13,679	-30.2%	Tokyo, JP (HND)	1,184,350	-67.0%	Frankfurt, DE (FRA)	177,405	11.7%
New Delhi, IN (DEL)	13,468	-35.4%	Mexico City, MX (MEX)	1,179,992	-47.6%	Guangzhou, CN (CAN)	170,530	1.1%
Xi'an, CN (XIY)	13,442	-6.2%	Charlotte NC, US (CLT)	1,163,744	-46.3%	Paris, FR (CDG)	156,300	-7.1%

Note: Total scheduled and non-scheduled services

(Source: ACI)

In terms of aircraft departures, the Top 15 airports reported a combined fall of -26.6% YoY. While US and Chinese airports continued to dominate Top 15, Tokyo and New Delhi, appeared in the list for the first time since May 2020. Atlanta ranked 1st with -29.5% decline, followed by Dallas/Fort (-22.0%). Guangzhou reported the smallest fall at -1.8%, followed by Shenzhen (-2.8%).

In terms of passengers, the Top 15 airports posted a total fall of -41.3% YoY. Ten airports in Asia/Pacific ranked in the Top 15, including eight Chinese airports, New Delhi and Tokyo. Guangzhou retained the 1st place, followed by Shenzhen and Beijing. Kunming and Hangzhou reported the smallest contraction at around less than -10%. Mexico City made it to the list for the first time since 2020.

In terms of freight, the Top 15 airports reported a YoY increase of +8.0%, recording seventh consecutive monthly growth since June. Majority Top 15 recorded YoY growth, except for Shanghai, Dubai, and Paris. Hong Kong rose marginally at +0.9% while retained the 1st position. US airports recorded stronger growth overall, with Memphis up by +22.1%.

### TOP 15 AIRLINE GROUPS (Ranked by RPK)

DEC 2020: -63.3% YoY in terms of RPK for the Top 15

DEC 20

In terms of RPK, the Top 15 airline groups accounted for 55.3% of the world's total RPK in December 2020 and declined by -63.3% YoY. This decline was 6.4 percentage points smaller than the fall in world's average RPK, with all airlines in the Top 15 posting contractions.

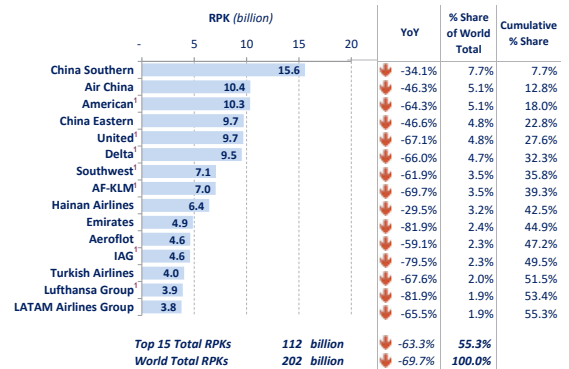
The Top 15 airline list was the same as November, nonetheless rankings fluctuated due to the epidemic divergence across countries. Top 7 were dominated by airlines in China and US, the two largest domestic markets.

The three major Chinese airlines reported moderated recovery due to the new outbreaks and resulting restrictions, but they still demonstrated the strongest resilience. China Southern and Air China retained the Top 2 positions while China Eastern slipped to 4th. Hainan Airlines moved one position down to 9th; however, it recorded the fastest recovery among the Top 15.

For the first time since the lowest point in April, American ranked within the Top 3, surpassed China Eastern. United, Delta and Southwest, occupied the places of 5th to 7th, with YoY traffic decline at around -60%, a slight slowdown from November.

Traffic declines of airlines in Europe eased somewhat owing to increased travel during holiday season. AF-KLM climbed up one position to 8th, whereas the others dropped one position and ranked between 11th and 14th.

Both Emirates and LATAM posted smaller fall and ranked 10th and 15th, respectively.

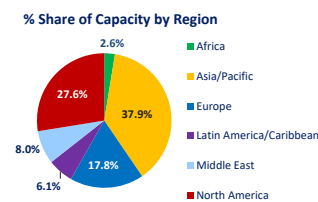


(Source: ICAO, airlines' websites)

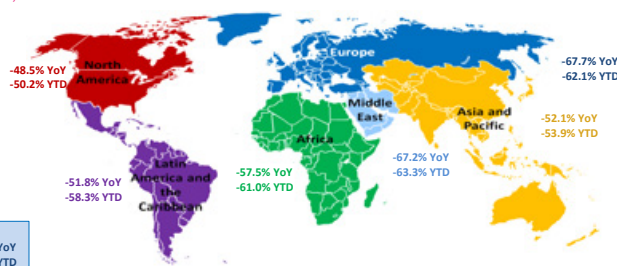
Note: Total scheduled and non-scheduled services

### CAPACITY BY REGION (ICAO Statistical Regions)

DEC 2020: -56.7% YoY in terms of World ASK



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



Worldwide capacity contracted by -56.7% YoY in December 2020. All regions saw increases in capacity, with the most significant acceleration in Africa, followed by Europe and Latin America/Caribbean. Capacity increase in other regions was modest.

Capacity offered in 2020 closed out at -56.5% YoY. The fastest resumption in capacity was recorded in North America while the slowest was seen in the Middle East.

\* 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.