# HERMES

AIR TRANSPORT ORGANISATION

## 2021_RECOMMENDATIONS

### RESILIENCE AND EFFICIENCY THROUGH LEADERSHIP AND COOPERATION

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# RESILIENCE AND EFFICIENCY THROUGH LEADERSHIP AND COOPERATION

## Introduction

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

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

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

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

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

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

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

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

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## Salvatore Sciacchitano, President of the ICAO Council

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**What are the upcoming challenges of the recovery phase?**

The Council, through the work of its Council Aviation Recovery Task Force (CART) has identified three key areas which will require the continued coordination and commitments of States, UN agencies, international and regional organizations, and industry. The first of these is the planning of national risk management strategies to gradually reduce reliance on public health measures and reactivate economic activity.

The second area of key priority concerns the possibly profound implications for traditional air transport due to COVID-19, and whether in terms of its business models or operations.

The third key area the Council has identified concerns the priority for us to learn together from COVID-19 to improve overall air transport crisis preparedness, enhance economic and environmental sustainability, and enable smarter operations. To help countries explore the specifics of these and other challenges, and, in particular, to sensitize governments to make aviation the highest priority in their political agendas, the Council has approved a High-Level Conference on COVID-19 be convened by ICAO this coming October.

Another priority is to move the work forward on aviation climate action. The post-COVID period will no doubt provide aviation with a tremendous opportunity to build back better, to recover greener. This is an opportunity to accelerate the transition of the global air transport network toward its decarbonized future. ICAO will continue to support bold action in this regard. ICAO will lead the sector along this path for a green recovery. And ICAO will ensure that *No Country is Left Behind*.

**What lessons have we learned from this global crisis?**

It remains to be seen how the pandemic more specifically will affect the organization over the longer-term, but certainly we can expect that issues which every major company and organization are now facing will have impacts at ICAO as well. This would include ICAO meetings being able to be attended both in-person or virtually, and more ICAO staff working remotely. There will be a new normal on the way we work and the way we travel by air. Definitely a more digital, resilient and sustainable one.

The Council and Secretariat are continuously working to identify new efficiencies to help ICAO be more streamlined, inclusive and cost-effective for the countries it serves.

**What direction will ICAO take in a post-pandemic world? How will the Organization reinvent itself to become even more relevant and responsive to the needs of its member States and the air transport industry at large?**

ICAO was already in the process of modernizing itself before the pandemic struck, and primarily to help accelerate the safe and effective standardization and regulation of air transport innovations, given the speed at which these are arriving today.

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This priority is only made more relevant given the current expectations that further innovations will be required for the new normal ahead, whether to make the sector more resilient to future communicable disease threats, more accessible to new types of aircraft and operations, or greener and more sustainable to address the international aviation effect on the global climate. For this reason, the Council of ICAO has recently decided to establish a Consultative Forum with Industry on Innovation. This consultative forum between the Council of ICAO and Aviation Industry leaders aims at increasing ICAO awareness on technological innovation and exploring how ICAO can support its introduction.

**In light of the pandemic, are countries still on course to meet their CORSIA objectives?**

Their main priority is still on in-sector measures to reduce $CO_2$ emissions, including green aircraft technologies and innovations, operational improvements, and increasing use of sustainable fuels and clean energy. As the first global market-based measure for any industry sector, CORSIA plays a complementary role to ensure the achievement of ICAO Member States' collective goal of 2020 carbon-neutral growth for international aviation.

Today, CORSIA implementation is fully on track and ICAO has completed all necessary steps for the start of the CORSIA pilot phase on 1 January 2021. Despite the unique challenges associated with the COVID-19 pandemic, we have seen significant progress in States on the timely implementation of the $CO_2$ Monitoring, Reporting and Verification (MRV) procedures, thanks to the robust ICAO Assistance, Capacity-building and Training programme for CORSIA (ACT-CORSIA).

**What role will the industry have to play with respect to ICAO post-pandemic? How can industry stakeholders better engage with ICAO in the future?**

The aviation industry is already well-represented through formal IATA, ACI, ICCAIA, IBAC, IFALPA and CANSO involvement with ICAO and now will also contribute through the ICAO Industry Consultative Forum highlighted above. Indeed, we've been very grateful to have the voice of the aviation industry advising us through every step of the CART process.

Under the current new circumstances, ICAO is adapting its processes to maintain engagement at a more strategic level. Additionally, we continue coordinating with all the stakeholders, elaborating the best practices and ensuring that no one is left behind.

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## Abdul Wahab Teffaha, Secretary General, AACO

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

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

The question I ask myself is how the industry and the stakeholders will talk or be able to convince governments, when many of them ignored the guidelines of ICAO, WHO and IATA, even after those guidelines were welcomed and sought after by those same governments. Look at what is happening today with the UK after the discovery of the new strain: governments resorted back to their comfort zone of employing unilateral measures, no harmony, no discussions even no scientifically driven measures. Going back to the basics, it needs to be stressed that those measures taken today have proven to be not good enough to mitigate the spread. So, the answer is not more closure, the answer is openness with intelligence, that is "smart openness" rather than just fall back on isolation and for some politicians to try to convince their constituencies that they are doing the right thing, driven by the fear of blame rather than driven by leadership. This is where many governments have failed miserably in dealing with this pandemic. Now we can see the light at the end of the tunnel, the vaccines are there, and we know that we have started with the help of the vaccines the way out of the tunnel. But the question is going to be: "how many airlines, restaurants, hotels, stakeholders, people are going to be left out in the tunnel?" Because by the time we exit the tunnel we will be a smaller industry in terms of connectivity, which will have serious repercussions on the recovery of the economy. We need to reach that light at the end of the tunnel with the maximum possible strength rather than what they are seeing today which is causing the damage for the industry for no good reason.

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

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

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

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

I believe that, at the moment, the whole industry is in a survival mode, so no one is looking at who is taking what from his government. I believe that this is the role of governments. They need to step in and provide safety nets for the airlines in what they represent, that is a major contribution to the economic resilience. Therefore, if US and EU airlines are receiving support from their governments, that's great, because I am calling upon the Arab governments to do the same. Governments are required to step in during times of crises and provide safety nets in order for the economy to recover faster. Without that safety net imagine what would be the case for jobs and how the recovery will happen. What the recovery will be like when we get out of this situation if the main foundations of the players, stakeholders, airlines, hotels, restaurants and so on have collapsed during the crisis. So, I would not think that what is happening with the support is bad. US airlines are receiving something like 30% + of their perceived losses. Airlines in Europe received more than 35% of their perceived losses, while airlines in the Arab region received only 11% of their perceived losses. I am encouraging governments in the Arab world to support the airlines in similar magnitudes.

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Otherwise, it will be very difficult for the airlines to go back to their normal pre-crisis operations very quickly. Because of the competitive nature of the business, there have always been voices against subsidies claiming, "I cannot compete against airlines that get subsidies". These claims will be heard again when the industry gets back to normal, but in the current situation, any cent spent on airlines and any other stakeholders such as airports and so on in support of the resilience of the aviation industry and its satellite businesses is wanted and needed.

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

IATA and ICAO should take the lead jointly with WHO in order to provide the needed power to convince governments that there is a better way of dealing with the problem. I am not talking about appealing to governments but about a joint strategy built upon the main requisites of the stakeholders for a quick recovery. IATA representing the airlines which are the connectors and the backbone for the other related industries; ICAO representing the infrastructure and the entry points; the governments in terms of oversight over the airlines, airports, airspace and so on; and the WHO for being the party representing the governments in relation to the required health measures and measures in general to deal with the pandemic. So, the leadership should be a combined leadership that is required not only to produce guidelines which are of course important especially the harmonized guidelines provided by ICAO in conjunction with IATA and WHO - but also to reach out to governments individually and to talk to them and present action plans for dealing with access to their countries and dealing with the measures required by most governments in order to ensure travel with the maximum biosafety. I will present an example of what we have done jointly with the Arab Civil Aviation Organization, IATA and ICAO regional offices, and the Arab Tourism Organization, to give an idea of how this can be implemented: we have taken ICAO CART guidelines and discussed them in a joint Forum with the four organizations and developed an action plan which was taken to the Arab Council of Transport Ministers for approval and it was approved. We also went to the Arab League which is the custodian of all the joint Arab efforts, and it was approved. The implementation tool for these measures will be through a joint meeting that will bring together the executive offices of the three ministerial councils that made the harmonization of these measures, the CART measures basically, possible for implementation. More specifically, the meeting will bring together the Arab ministers of Health, Arab Ministers of Transport and Arab Ministers of Tourism in order to adopt these measures and then to carry on with the individual governments for implementation. This is a model that can be done elsewhere in the world.

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

Absolutely. This does not mean that collaboration does not exist today. There is a great deal of collaboration between IATA and ICAO on the environmental front and between A4E, EUROCONTROL, and the EU on infrastructure development and air traffic management flows. Those examples of collaboration have led to better results not only for airlines and for airports, but also to the sustainable development in all the countries of the world. So that model of collaboration is already here, what it needs to have is more passion in doing things, more decisiveness to go beyond the conventional. Unfortunately, some members of governmental organizations raise too many hurdles by invoking the principle of sovereignty. I do understand it, but most of the times it comes into play to stop things from happening rather than to make them happen. The sovereignty concept should be used to take from best practices and best work that is done globally and

implement them nationally. But what is happening most of the time is that sovereignty is like a comfort zone where countries or governments step back and say, "we will not do what is recommended because we are sovereign!". They invoke sovereignty every time they want to stop something from happening. This is where going beyond the conventional is important. And to use an example: Why is it that the EU was the very successful in dealing with this crisis in comparison with other parts of the world? Some people may say China, but Chinese dynamics are totally different than the western dynamics in relation to how they implement measures internally, how they enforce adherence. That cannot happen in the Western world. But if we compare two western powers, the EU with the US, the EU is much more successful in handling this crisis and this is obvious by the number of infections. The secret in that success is that the EU transcends political boundaries in Europe and has the power to be listened to by national governments in that region.

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

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

But there is a caveat on deliverables of cooperation. Cooperation is great if it leads to action on the ground. To give an example: CART I and CART II were excellent initiatives that led to harmonious measures that can be implemented by governments. Unfortunately, it stopped there, and I am not blaming ICAO for that. Guidelines are guidelines but aviation people and governments are not the drivers. If you do something good in the time of crisis then it serves as a model for what can be done in normal times because that will add value to whatever you are doing. If you are succeeding in a crisis then you will succeed with high marks in a normal situation. ICAO succeeded in bringing together different parties to issue the guidelines. But these guidelines, despite the best efforts of ICAO which created dashboards to show who is implementing and who is not - have not been as successful as expected. I believe that many of the individual stakeholders in ICAO did not play their role in order to make these guidelines implemented globally. It is not ICAO nor IATA to blame, what needs to be done is to actually change the attitude towards what is called "guidelines" from being only "guidelines", that is recommendations that we can forget about and do whatever we want, to something more concrete: to understand that guidelines need to be actually implemented. Good things are measured by what happens on the ground, and not by good intentions. Seeing what has happened this last year with the UK has made me believe even more that no matter what great guidelines one does, no matter what great recommendations one does, no matter how deep the collaboration is, the test is what is implemented on the ground at the end. Therefore, on the theoretical academic level, what we have done collaboratively is great, but on the ground, airlines and stakeholders are still suffering and many governments are doing what they want to do, individually, that is making life even more difficult for aviation. I hope the lesson to be learnt from this crisis is that we can collaborate and talk in principle as much as we want but the achievement is

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not there. The actual achievement is how much of that is going to transpire to the actual stakeholders on the ground. And this is what matters: what our people are going to feel that what we have done together has made a difference, a positive difference.

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**Air transport resilience and efficiency through leadership and cooperation**

Presented by ACAO

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Transport plays an essential role in the development of nations by loosening the isolation of regions, and enhancing social and economic exchanges through people and goods movement facilitation. This development contributes in producing wealth and employment opportunities, whether in industry or in the transportation infrastructure system. Today, transport plays an important part in achieving the Sustainable Development Goals set by the United Nations for 2030.

Air transport, which is an intrinsic part of this system, is distinct from other means of transport by its speed, efficiency, regularity and high level of safety, drawing on international standards at the institutional, organizational, financial and technical levels. However, if these basic principles persist, the air transport system is called to continuously adapt to the international environment developments.

During the past decades, the air transport sector has recorded great growth despite the impact of the tragic events that the world has known, such as the awakening of volcanoes, earthquakes, tsunamis, epidemics, terrorist acts, increased fuel prices, financial and economic crises, revolutions, and social movements ... that many countries have gone through.

These events contributed to the emergence of a new scene characterized by:

- The disappearance of major airlines.

- Strengthening alliances between traditional companies that are no longer able to deal on their own with the constraints of the market.

- The emergence of low-cost airlines and their increasing dominance in the short and medium term thanks to their attractive pricing policy.

- The emergence of a trend that tends towards privatizing airport and air navigation services.

- The competition provided by the liberalization policy practiced by countries with a high share in international air transport.

- Environmental protection requirements.

- New restrictions related to consumer rights protection.

- Increased security and safety measures.

Thus, the air transport industry showed maturity and great ability to adapt to various risks and succeeded in surviving and reaching increasingly large sectors of the population thanks to lower prices and to leveraging new information and communication technologies.

✓ **The international civil aviation framework designed to curb the spread of epidemics**

Today, as we face the repercussions of the Coronavirus epidemic, which has claimed the lives of many people, and caused unprecedented damage to our societies and economies, the first of which was the air transport sector, we recall what our countries have done believing that the international civil aviation sector can help create and maintain friendship and understanding between nations of the world and its peoples, and in an effort to promote cooperation among them, have agreed on principles and arrangements establishing the provision of safe and orderly international civil aviation, and the establishment of an international network of air transport.

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Among the arrangements made in this framework is the spread of diseases prevention, as Article 14 of the Chicago Convention affirms the consent of each contracting state to take effective measures to prevent the spread of infectious diseases that the contracting states decide to commonly define from time to time, and that, to this end, the contracting states maintain continuity in close consultation with bodies concerned with international regulations related to health procedures that apply to aircraft. This consultation shall take place without prejudice to the implementation of any existing international agreement in this regard, to which the contracting states are parties.

Resolution No. 14-40 on mitigating the spread of disease through means including, inter alia, aircraft disinfection, vector control methods and the importance of the Collaborative Arrangement Program for the Prevention and Management of Public Health Events in International Aviation (CAPSCA) issued by the General Assembly of the International Civil Aviation Organization at its fortieth session, urging countries to take measures, including membership in the Collaborative Arrangement Program for the Prevention and Management of Public Health Events in the Field of International Aviation (CAPSCA), and work to activate the recommendations contained in the publications and guidance materials issued by ICAO, the World Health Organization and the "CAPSCA " program.

The global outbreak of the Corona epidemic represented an opportunity to mobilize all components of the international system to manage the crisis first, and to develop a global approach secondly, in which the international civil aviation sector, with all its components, including civil aviation authorities, global and regional organizations, as well as the air transport industry sector, was involved for the recovery of the civil aviation sector.

The Council's Aviation Sector Recovery Task Force (CART) adopted from the outset basic principles in its approach to laying down measures to restore air transport activity, including the second principle, which affirms that supporting the safe, secure and sustainable recovery of the global aviation sector is in the best possible way. Through an internationally coordinated approach that relies on working as a single aviation team and showing solidarity, and on the need to integrate ICAO plans and those of states, international and regional organizations and industry. Should national and regional needs require different approaches, States should coordinate responses to the greatest extent possible, in line with ICAO standards, plans and policies.

After preparing two packages of recovery measures, the ICAO Council adopted during its 222nd session last March the third version of these recommendations and procedures, the most important of which is standardizing health-testing certification by countries by issuing safe, reliable and interoperable documentary evidence internationally, and encouraging aircraft crews to undergo vaccination. With the possibility of exempting crew members who have been vaccinated or have a history of infection with the COVID-19 virus confirmed by laboratory testing programs, and proof of vaccination in an approved national registry provided that countries issue a safe and globally interoperable guide.

As for public health corridors, the latter are implemented between countries based on mutual recognition of public health mitigation measures implemented by each party on one or more paths, with states being encouraged to exchange information through the ICAO Public Health Corridor model.

These corridors are the subject of a stand-alone memorandum of understanding due to their exceptional and temporary nature, and cannot be considered an amendment to the air services

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agreements or as a reason for resuming future negotiations on the latter. The inclusion of a clause on registration with the International Civil Aviation Organization (with reference to Article 83) is at the discretion of the parties.

ICAO has developed an application that provides a legal and operational model framework for the development of bilateral or multilateral arrangements according to the needs of each country and epidemic situation. This application facilitates the development of a mutually recognized safety risk management approach on the pathways identified under this arrangement.

This will help our countries to reopen international flights again, at a time when it is imperative to bypass the constraints that hinder the process of immunity against Covid 19 virus through the provision of vaccines.

Here, I would like to point out that our region was the first to emphasize the need for consultation and coordination of efforts to confront this crisis, under the umbrella of the International Civil Aviation Organization and within the framework of the CART Team. The Arab Civil Aviation Organization, as a specialized Arab Organization under the Arab League, aims to strengthen cooperation and coordination among member states. It has undertaken several initiatives at the level of civil aviation authorities in these countries, as well as at the level of the councils of Arab transport ministers, tourism ministers, and health ministers of the League of Arab States, the first of which was to take decisions and actions that support airlines, before the end of March 2020.

We have also suggested, from the start, a global plan to restart and restore air transport pursuing the following goals:

- Reassuring passengers and governments of the safety of air transport;

- Prevent fragmentation of health measures and their negative impacts on operational sustainability and travel experience;

- Ensure an orderly return to service of the air transport when the travel restrictions end.

In order to achieve these goals, two important axis must be addressed in a continuous and collaborative manner:

1. Globally coordinated health measures that ensure the transmission of the virus is mitigated while at the same time reducing the compliance burden on air transport passengers and stakeholders.

2. Continuous risk assessment and development of scenarios at the national and regional levels, to determine the resources and infrastructure and their impact on return to service.

✓ The importance of regional blocs

Border closure accounts as one of the precautionary measures adopted by countries to confront the outbreak of the new Corona virus (COVID-19), which affected the air transport sector, especially for those countries among Arab countries that are important markets for air and tourism activity. The air transport activity, in the latter, was strongly affected compared to other countries operating within the framework of regional blocs with an integrated air transport market. An example is the single European air transport market, which represents more than two-thirds of the total air traffic of the European Union, and there is the Association of Southeast Asian Nations (ASEAN), where the unified market for air transport activity for this group constitutes about 40% of the total traffic. In many countries this led to the idea of establishing regional blocs in order to create similar markets,

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including Latin America and Africa. The latter is now working to activate the unified African air transport market, which is a pioneering project within the African Union's agenda 2063. Its launch was given on the sidelines of the 30th summit The African Union, as this initiative aims to establish a unified market in the field of air transport in Africa, and will provide about 9.8 million jobs within the year 2036, with undeniable impact on the gross domestic product, which is expected to reach 159 billion dollars within the same year.

Arab countries, in turn, were the first to establish the Arab air transport market within the framework of the Damascus Agreement to liberalize airspace, especially since the Arab world occupies a strategic position between Europe, Asia and Africa. The Middle East and North Africa region is today the fastest growing region in the world in terms of air transport, investing huge amounts of money on Airlines and airport infrastructure, to keep this momentum, by giving a strong impetus encouraging Arab countries to lift operational restrictions on the basis of a bilateral approach and liberalizing air transport services to reach a unified market for air transport, by:

• Expanding the signing, joining and ratification of the 2004 multilateral agreement (the Damascus Agreement) for the liberalization and its implementation, including economic rules and legal guarantees, which would enable Arab carriers to work with expansion plans,

• Encouraging Arab countries to sign, join, and ratify the amended agreement for the "Exchanges of Customs Tax and Duties Exemptions on the Activities and Equipment of Arab Air Carrier" because of their benefits and gains they represent for Arab Air Carrier in terms of contribution and support to the activities of these carriers.

• Supporting continuous cooperation with international and regional organizations for coordination (ICAO - ECAC - LACAC - African Union ... etc.)

• Permanent and continuous coordination with the civil aviation authorities in the Arab member states to coordinate positions and efforts that support Arab carriers operation.

• Encouraging Arab countries to sign and join international agreements and protocols that would support the development of legal frameworks that contribute to the growth of the operation of Arab carriers.

• Encouraging the use of international inter-transportation means.

• Establishing an emergency plan for the optimal use of the actual achievements.

• Enhancing cooperation and integration between air carriers in terms of training and employment.

   ✓  Communication

The path to establishing a more resilient aviation system is based on comprehensive communication, including the establishment of close, transparent and continuous communication between all stakeholders, as well as towards the public. Coordinated and clear information and an emphasis on safety, security and operational integrity of aviation systems will enhance compliance with actions taken to reduce risks and help develop resilience to crises while addressing recovery and demand growth.

International and regional organizations, international civil aviation and public health authorities, in cooperation with the aviation sector, should communicate clearly and effectively to enhance

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travelers' confidence and help people understand how to contribute to the safety of a traveler's flight, and digital platforms should be used wherever possible.

Since the beginning of the outbreak of the new Corona epidemic (COVID-19), the concern of all involved stakeholders, regardless of the diversity of their fields of specialization, is to enhance public confidence due to the proliferation of rumors and the large number of news that terrorize the latter. In light of the skepticism and the decline of confidence resulting from the news related to "Corona", It was necessary to think about ways to restore the public's confidence, by highlighting reports of interest and concern to the public, and through more effective communication based on clear goals that are mainly reflected in:

- Ensuring the transfer of relevant, consistent, accurate and up-to-date information to all stakeholders and states;

- Supporting the implementation of the International Civil Aviation Organization (ICAO) provisions, recommendations, guidance materials and the outputs of the ICAO Council Working Group for the recovery of the aviation sector (CART) as approved by the ICAO Council.

- Help get commitment at all levels.

These goals are likely to change through the evolution of the new Corona epidemic (COVID-19), with the development of measures taken by countries and national and regional efforts to limit its spread, as well as with the recommendations received from the World Health Organization.

A thorough understanding of the role played by other, non-aviation national organizations such as public health authorities, military authorities, customs and immigration authorities as well as establishing coordination is critical and fundamental to ensuring that strategies are effectively and smoothly implemented.

Moreover, preventive measures must be consistent at all levels: before the airport; at airport facilities; Personnel and crew interacting with passengers, on board the aircraft, upon transit; after the flight and upon arrival at the destination.

Providing future travelers with information about what needs to be taken into account regarding covid 19 symptoms is crucial, as promotional materials must ensure that passengers are not only aware of the applicable preventive health measures but are also fully committed to them.

Enhancing traveler's confidence in aviation is of utmost importance and is the key to the recovery of the sector. This confidence consists in the following elements:

- Take effective and efficient measures to protect passengers and flight crew interacting with passengers, allowing the health risks associated with COVID-19 to be mitigated;

- Ensure that available scientific data are constantly reviewed;

- Measures and procedures in place to treat the response to any case showing symptoms of the disease to avoid danger to other passengers.

- Passengers' experience in honest and open interaction on behalf of the authorities regarding measures taken to mitigate risks associated with COVID-19;

- Receive clear, detailed and supportive information on civil aviation safety measures, that are adapted to various groups in order to meet different needs;

- Obtaining realistic and scientific guidance about one's actions to meet his own responsibility related to the health and safety of others.

✓ Stakeholders

Coordination of actions at the global and regional levels is necessary to enhance public confidence, especially the air traveler, as stakeholders and industry partners who represent both international and regional organizations, civil aviation authorities, airlines, airport operators and service providers (ground handling, cleaning and catering companies), public health authorities and other companies from various business sectors that use air transport frequently (management consultants, tourism and entertainment agencies etc.), politicians and policymakers to ensure that their needs are recognized by aviation authorities, national regulatory bodies to take advantage of industry expertise as appropriate. All of these parties should In cooperation with the aviation sector, communicate clearly and effectively with each other to enhance travelers' confidence and help people understand how to contribute to the safety of their travel journey. They will also pursue strategies and initiatives to implement the aviation industry and strive to achieve synergies whenever possible to ensure the effective and timely implementation of recommendations and guidance materials for the Council of the International Civil Aviation Organization CART working group (CART).

Countries providing material support to the civil aviation sector in the current circumstances is necessary, especially since the sharp decline in demand for air transport, to which travel restrictions are added, has had multiple negative effects, including pressures on revenues and cash flows for all stakeholders. Examples include, but not limited to, airlines, airports, and air navigation as well as service providers and aircraft manufacturers. However, concerted efforts to address the actual problems related to the precautionary measures on air travel are the guarantee of the recovery of this sector and support its role in achieving the sustainable development goals.

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✓ Coordination and cooperation

The main objective of coordination and cooperation activities is to facilitate the exchange of information and experiences, including best practices, challenges and lessons learned, between countries and regions. It also aims to avoid duplication of efforts between all aviation stakeholders and to enhance cooperation and synergy among them whenever possible.

In this context, the civil aviation authorities are invited to continue holding regular meetings with the International Civil Aviation Organization at the level of the General Secretariat and relevant regional offices and with regional and international organizations and Member States to support the exchange of information on actions taken, experience, best practices, challenges encountered, and initiatives implemented, successes, and help required. This is in order to unify positions and visions, especially as we look forward to holding a high-level international conference on recovery in the civil aviation sector, next October.

- END -

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**Resilience and efficiency through Leadership and Cooperation – how can shared leadership and collaboration between industry leaders help to address the challenges facing aviation today?**

Presented by EUROCONTROL

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## Introduction

*In 2021, the aviation industry is facing two existential threats. The first and most immediate is how to survive the devastating impact of COVID and come out of the crisis with a sector that will be fit for purpose, structurally and economically able to deal with future crises. The second is sustainability, which is a deeper challenge that will be much more difficult to solve. Climate change is the single biggest issue facing society today, and aviation needs urgently to find workable solutions to lessen impacts and make our industry more sustainable.*

## What are the challenges facing our industry?

Before the COVID crisis hit, the aviation industry was already under tremendous pressure. With delays peaking at an average of 14.7 minutes/flight in 2018, the system was struggling to deliver enough airspace capacity and cost-efficiency, and unable to advance on key dossiers, particularly regarding the slow pace of delivering the Single European Sky (SES).

These challenges were tackled head on by the Wise Person's Group, which in its 2019 report called for 'a customer-focused SES that meets future needs for aviation services and environmental goals'. The group defined a clear and achievable vision for the future of ATM, envisaging "a **safe, seamless, scalable and resilient aviation network**" that "will be delivered through digital air traffic management services for all airspace users (civil and military) and passengers".

The Wise Person's Group also clearly identified that reducing the environmental footprint of aviation would be a key challenge for the future. Events over the course of 2019 and early 2020 would confirm this, as environmental issues moved up the agenda with remarkable speed, due in no small part to the flygskam movement coupled with increasing pressure from the European and national parliaments. This would culminate in the European Green Deal, proposed at the end of 2019 and adopted at the start of 2020, which defines very clear environmental targets for all sectors including the aviation industry, with the aim of achieving a reduction in the $CO_2$ emissions from transport of 90% by 2050.

COVID has given the industry its biggest shock ever. By April 2020, European aviation had collapsed with flights over 90% down. Despite a mini-recovery over the summer, uncoordinated State responses and changing advisories saw the year close with European aviation having lost 55% of all traffic – 6.1 million flights fewer than in 2019. At the time of submitting this paper in March 2021, European aviation remains 65% down on 2019 traffic levels. Losses to the aviation industry globally are estimated at close on €350 billion, with European aviation alone estimated to have recorded €56.2 billion in losses in 2020. The sheer number of bankruptcies, businesses closing, jobs being lost across the industry, and huge declines in flight and passenger numbers has brought into sharp relief the inefficiencies and deficiencies in the system that underline the need to strengthen our resilience.

Allocation of unbalanced State aid that has supported certain sectors of the industry over others, and some public entities over private ones, has changed the level-playing field that we started to build with deregulation at the end of the 1980s. It has also highlighted the tremendous interdependencies between all the players – airports, air navigation service providers (ANSPs), aircraft operators, industry, the military. As we struggled with the stop-start for air traffic over the course of 2020, with

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closing of borders and inconsistent rules for travel, it became increasingly apparent that providing support to one part of the industry or one player was not the way of ensuring that the industry as a whole, with the millions of jobs that it delivers and its huge contribution to European GDP, would be able to survive.

That is why EUROCONTROL and its Member States took a series of bold and timely actions in 2020 to demonstrate leadership and to play their part in providing much-needed support to European aviation. A loan facility of €1.3 billion was secured by EUROCONTROL to support the ANSPs. Ten States used the facility, leading to a loan of €272 million which was successfully rolled out in the course of 2020. In parallel, immediate relief was provided to all airlines by deferring up to €1.1 billion of route charges as a way of easing their liquidity burden.

In addition to financial support, over the course of 2020, EUROCONTROL radically revised its approach to public provision of data, ramping up dramatically the quantity and quality of data and analysis provided to Stakeholders. Outputs such as Think Papers, weekly Comprehensive Assessments, dashboards and daily data tweets were all provided in an open and transparent manner to decision-makers across the industry, supporting them to take business decisions on the basis of reliable, comprehensive and shared information.

Transparency and inclusiveness in a network-centric approach are also a feature of the CDM process put in place within the EUROCONTROL Network Manager. This collaborative approach has significantly improved the operational management of the crisis, and ensured that preparations for recovery are strongly coordinated between the various operational actors. By bringing aircraft operators, ANSPs, airports and military partners together regularly, and transparently sharing information, EUROCONTROL has aided decision-making by helping establish a common understanding of the situation and how it is evolving.

Actions such as these can go some way to helping to create a level playing-field and supporting the different parts of the industry, but they are not enough, in particular in a context where some States are in a better position than others to support their national carriers their airports or their ANSPs. If we want to come out of this crisis able to build and grow again as an industry, we need to take on board these lessons and the need to look in a more global way at how our industry works. The challenges that face us in the post-COVID era are in fact larger and more challenging than the one we have faced in the past 12 months.

### Post-COVID – what are we building to?

Aviation is, and will remain, a cornerstone for our globalised and interconnected world. It contributes hugely to European and global GDP, providing pre-crisis 65.5 million jobs globally in an industry worth over USD2 trillion to the global economy. It facilitates international trade, creates jobs, unites people, and welds together far-flung regions. It makes Europe not a continent with distant islands, but a united whole that can be crossed safely and securely in 5 hours.

We do however need to recognise that the world post-COVID will not be the same as before. In a 5-year forecast released at the end of 2020, EUROCONTROL found that the most optimistic scenario would see traffic returning to 2019 levels by 2024. However, in the second scenario (based on a vaccine only being widely available and taken up in 2022), the 2024 traffic would only be at 92% of

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the 2019 figure. In the third scenario, traffic in 2024 would be 75% of the 2019 figure and would not reach numbers seen in 2019 until 2029.

These numbers highlight the need to seize this opportunity, and not only to build back better, but **build forward differently**, if our industry is to survive and thrive in the post-COVID world. We need to be able to adapt quickly to changing consumer patterns and societal requirements and to do that, we need to build an industry that is **resilient, flexible** and **scalable,** able to deal with the 'black swan' events that will certainly come in the future.

As a first step, we need to revisit how the industry is funded. **Clear** and **transparent funding mechanisms** that allow balanced operation of market forces and state support are needed to ensure we can achieve our common goals. During COVID we have seen a very different picture of funding support from different States. In some cases, partially or fully State-owned legacy carriers have received emergency support, while in general privatised airlines including all low-cost carriers have been left to fend for themselves. The picture is equally fragmented when we turn to airports, where some have received funding, while others have had to manage alone. Even among ANSPs the level and type of State support provided have varied widely. We have to challenge this approach head on because it distorts competition and poses a real risk that when the crisis has receded, a playing field will be in place that is far from level, stocked with many companies that are less resilient, less competitive, and ill-suited to compete internationally and in an open market. This risks undoing all the gains in competitiveness built up in recent decades, with negative effects on the European consumer and the European economy.

This approach is also important if we want to ensure that the future European aviation industry remains globally competitive. We have seen all too clearly how taking a purely local, regional or national approach is catastrophic for any business that needs to operate seamlessly across borders, providing services that are vital to European society. So to achieve this objective, we must ensure that Europe's aviation industry is indeed truly European and operates on a basis of financial equity regardless of what is seen to be national interest.

The second and key element to building back better and building forward differently will be to build an industry that is **sustainable in the long term**. Different parts of the aviation industry have different roles to play in this sustainability roadmap. Up to 10% of emissions today can be addressed through improvements to air traffic management systems, and many of these evolutions are available today. Reducing the environmental footprint of the fuel that powers aircraft is another powerful lever; alternative airframes fully powered by carbon-neutral fuel sources is another. Airports are already making major strides in improving the footprint of their infrastructure and working through programmes such as ACI's carbon accreditation scheme to pursue carbon reductions in line with the goals of the Paris Agreement. Much more work needs to be done however to ensure that ground-based infrastructure can achieve carbon-neutrality in the coming decades and to incentivise sustainable solutions such as the uptake of Sustainable Aviation Fuel (SAF), as well as research and development into new technologies like electric or hydrogen-powered commercial airliners, which will require significant investment to realise.

As a European industry, we need to take all of these different strands of work forward in a coherent manner, with a shared vision and a common understanding of how each separate element can contribute to our common goal. Crucially, we need a shared understanding that no one part of the industry can promote its green credentials at the expense of another, one of the reasons

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EUROCONTROL has recently started publishing a Sustainability Briefing aiming to highlight the different kinds of work being done across the sector as a whole.

State actions during COVID have shown that different legislative frameworks across Europe create a patchwork of confusing and fragmented measures. Without **coherent legislative frameworks**, the airlines in particular but also the associated industry partners do not have the certainty and predictability that they need to return to profitability and then to grow in a sustainable manner. Part of building back better and forward differently will be to ensure that there is at European level the appropriate mechanisms to take coordination action between States on matters that affect aviation.

EUROCONTROL has tried to be a catalyst for this discussion and to help the industry see beyond the near term problems which have been extremely challenging, so that aviation will be fit for purpose when the COVID crisis passes, as it eventually will. We have coordinated our positions with Industry groups such as IATA, A4E, ACI, CANSO and well as our member states. EUROCONTROL has also looked inwards to ensure that we also continue to deliver the best possible service to our member states and the industry with the recent Deloitte study which proposes far reaching reform of EUROCONTROL over the next 10 years.

**Institutional reform**, the fourth area in which we must take action, is clearly needed across the industry as a whole. The Single European Sky package developed following inputs from the Wise Person's Group is desperately needed to deliver the changes needed to ensure that Europe's aviation industry will continue to prosper in the future. We need to seize the golden opportunity to reform how airspace is managed as ATM's contribution to improving Europe's aviation system.

## Conclusion

In summary, there are four key lines of action that we must pursue collectively to ensure Europe's aviation industry will be resilient and efficient in the future. We have to address funding, identify a clear pathway to carbon neutrality, develop coherent legislative frameworks and tackle institutional reforms head on.

The Wise Persons Group in their report identified a number of principles that served as the basis for their recommendations. While the report was written before the COVID pandemic, those principles and the approach behind them remain true. We need the real commitment of all Member States and stakeholders as well as the full involvement of industry to make the changes that will ensure Europe can remain competitive and a hub of future global connectivity.

- END -

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**Resilience and efficiency through Leadership and Cooperation**

Presented by ERA

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**Introduction**

The European Regions Airline Association (ERA) is a non-profit trade association representing around 60 airlines and 150 companies involved in the European air transport sector.

We are delighted to have been invited by Hermes – Air Transport Organization – to provide our thoughts and views with respect to Resilience and Efficiency through Leadership and Co-operation, against a backdrop of the continuing pandemic.

In the following Position Paper we hope to articulate the shared goals of stakeholders, how the stakeholders have and will continue to show leadership, and demonstrate how, as an industry, we have united to define how the sector should not only recover, but recover in a sustainable manner. We also lay out the current agreements and put forward the arrangements that are needed in the forthcoming weeks and months to allow air travel to resume in a safe way for all citizens.

**Round Table Report for the Recovery of European Aviation**

The aviation industry has coped with several historical disruptions and crises, including the financial crash, SARS, volcanic ash and terrorist atrocities. Different disruptions have always had a negative effect on aviation, but it is testimony to the dynamism and resilience of our industry that it has always been able to adapt, recover and grow, demonstrating the fundamental importance of air travel to the global economy. When the pandemic hit the world in the beginning of 2020, it became obvious we were woefully underprepared as a society and as an industry for such a seismic shock.

Just as aviation recovered from previous crises, the industry will recover again from this pandemic, but for this recovery to happen quickly, all stakeholders have to align as best possible. Indeed, during the past 12 months we have seen closer co-operation than ever between the operational stakeholders; airlines, airports, manufacturers and air navigation service providers and with the wider European trade associations.

This can be clearly demonstrated by the publication of the Aviation Round Table (ART) report in mid-November 2020, which launched the industry's joint proposals for the recovery and relaunch of our sector in a post-COVID-19 world. European associations, representing the entire European aviation sector, including airlines, airports, air navigation service providers, aeronautical manufacturing, trade unions, non-governmental organisations for environmental and consumer action, service providers, ground handling services, the duty free and travel retail sector, airport co-ordinators, general and business aviation, express carriers, travel agents, tour operators, travel distributors, and the entire tourism sector, came together to endorse the ART report because the gravity of the crisis threatening aviation in Europe called for unprecedented action. The report focussed on five main themes; restoring public confidence, green and social aviation, digitalisation, competition and resilience. Calling for a comprehensive Aviation Relief Programme to rebuild the sector, the report noted 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 highlighted maintaining connectivity, skills and employment and preserving the European internal market and its competitiveness as vital to ensuring aviation's recovery from COVID-19, improving its governance and making European aviation more resilient to future shocks.

That 24 of Europe's associations came together to agree on a significant package of key proposed actions and recommendations is unprecedented and clearly articulates those shared goals that we

can all agree on as an industry. By working with a wide spectrum of stakeholders with differing interests we can be aware of impacts across the sector and ensure no stakeholder group is disadvantaged when setting goals.

### *Destination 2050* and the sustainability challenges

Whilst COVID-19 remains the challenge of our time, environmental sustainability is the challenge that will define our generation. And addressing sustainability as we restart aviation following the pandemic is one of the key priorities for stakeholders from across the ecosystem.

In February this year, Europe's aviation sector (ERA, alongside A4E, CANSO, ACI Europe and ASD) unveiled its flagship sustainability initiative, *Destination 2050 – A route to net zero European aviation*. Driven by a new independent report which provides a vision and path for meaningful $CO_2$ emission reduction efforts in Europe and globally, it builds on the Paris Agreement and the European Green Deal and charts the path to how all flights within and departing the EU, UK and EFTA will realise net zero $CO_2$ emissions by 2050.

In a similar vein to the ART report, the collaboration for this initiative demonstrates how stakeholders are aligned and united behind a shared roadmap to achieve a sustainable future for our industry.

### Next steps

Given the different nature of the stakeholders involved in both reports, it should be of no surprise that the outcomes are a result of lengthy discussions and compromises, in particular for the ART report. In fact, compromises were reached on issues such as the flights in the scope for $CO_2$ reductions by 2050, the revision of consumer rights and data sharing for multimodal ticketing, to name but a few.

The recommendations and roadmap laid out in the ART report and *Destination 2050* show where industry is aligned in not only restarting aviation post pandemic but also addressing how we can do this sustainably, both in the short and long term.

It is clear that safety, sustainability and recovery are common goals that the whole industry can share, but careful collaboration and compromise will be needed when it comes to the detail.

High-level leaders almost universally recognise the importance of consensus and co-operation. Although all stakeholders may have their own agendas, they can come together on common objectives as demonstrated above, they may just have different ways of achieving these. Our industry is by nature competitive, so there is a need for robust regulation to protect the interests of smaller players. One of ERA's key roles is to give a voice to these smaller organisations, our members, and to get regulators to recognise how their decisions will affect them.

To allow Member States to help the businesses and economic actors suffering most from the crisis, the European Commission has softened EU legislation with regards to state aid. However, Member States have for the most part supported their flag carriers rather than the smaller regional airline players. This could lead in the medium to long term to competitive issues, and also to a decrease in connectivity with some routes closing. ERA is advocating for a focus on the unique characteristics of regional and domestic markets and for dedicated recovery tools. Domestic flying is most likely to be the first to return post lockdown (as it is not dependent on cross-boundary clearances) and hence should be encouraged as much as possible to get the airline industry moving again. The issue of the disproportionate cost burden of regulation on small regional airports must also be addressed via an

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## Resilience and efficiency through Leadership and Cooperation

Presented by AIRLINES ASSOCIATION OF SOUTHERN AFRICA

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## THE PANDEMIC – DIFFERENT STYLES OF LEADERSHIP

One thing the handling of the COVID-19 pandemic has shown us, is that across the world leadership styles have been so diverse as the many nation leaders, business leaders, community and family leaders have sought to manage the COVID-19 pandemic as they see fit, either in the interest of their nations and their people, their organizations, their community and family members or their own interests.   Since the emergence of the COVID-19 virus in December 2019, and particularly following its declaration as a pandemic on 11 March 2021, the World Health Organization (WHO) and in our industry, the International Civil Aviation Organization (ICAO), the International Air Transport Association (IATA), and Airports Council International (ACI), have led the way with the development of standards, recommended practices, protocol guidelines, processes and procedures on how to manage the pandemic in our industry, and in particular how to reduce and mitigate the risk of transmission of the virus in operations.  In general, the above measures have been largely successful in their implementation since once air travel was permitted, operations have proceeded with minor blame being apportioned to the air travel value chain for spreading the virus.  A culture of compliance which exists within the aviation industry has assisted greatly with ensuring standards are maintained by airlines and airports as passengers use their services.

However, the culture of pandemic reality is viewed differently across the public spectrum.  On one hand you have the group that acknowledges a significant threat to life caused by the spread of the virus, and on the other hand there is the group of denialists who believe to varying degrees that it is a hoax and openly disregard regulations that have been put in place as well as directives of leaders. The majority of Heads of State have led their nations acknowledging the threat of COVID-19, but some have openly disputed the existence of the virus, challenged science and disregarded the recommendations of the WHO.  The latter group of leaders have uniformly dismissed the threat, challenged their health experts, and dealt with the pandemic in a dismissive manner, only to see later how the pandemic has spread through their nation with them providing little comfort or leadership to their people on how to deal with the virus.

For those Heads of State leaders who have acknowledged the virus, there has been another challenge.   How does one impose restrictive measures on your people and take them along with your decisions?   Across the world, we have seen the most amazing display of the use of State authority to enforce regulations.  Through the declaration of states of emergency or disaster, the State has assumed power to impose restrictions and measures to control their citizens in ways not ever considered possible in an open society.  In the main, at least in the initial stages, the population largely accepted this and complied with leadership by decree.  This was probably largely as a result of uncertainty as to what this virus was and how it could potentially impact the population.   Each State had its own process of containing the virus including complete lockdown, risk adjusted lockdown depending on levels of infection and availability of medical facilities, and the imposition of travel bans with various levels of quarantining and testing.

## GOVERNMENT AND BUSINESS – THE NEED FOR INCLUSIVITY

One of the areas which has been of concern to the aviation industry as lockdown regulations were imposed and amended from time to time, is the level of access by private business associations and organizations to be able to influence Government decisions.  As the lockdowns persisted under severe restrictions, businesses became desperate as they fought for survival.  The aviation industry business in many States fell to zero overnight as lockdowns came into place in March 2020.   The restart was slow based on a Government assessment of the readiness of the industry to be able to operate with new protocols.   As the pandemic proceeded, access was given to some organizations to meet with Government, in some areas not widely enough, but ultimately Government made the final decision.

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Governments have been the subject of criticism, being blamed for the devastation that has taken place in the aviation, travel and tourism industry. Governments have consistently said that actions taken were to protect the lives of their citizens. However, the argument has been used that loss of livelihoods has led to massive fall-out and loss for families, directly and indirectly caused by COVID-19. Business leaders have said that many restrictions were kept in place for longer periods than required and had they been lifted, this could have averted many business and personal tragedies. Trying to balance the dynamic of lives vs. livelihoods has probably been the biggest challenge to achieve a solution acceptable to all. A recommendation is that Government should be more receptive to the views of business and the private sector, and achieve a more inclusive balanced approach to introduce efficiencies into the process. This has occurred in some States, although not across all business sectors. Many Governments still impose strict lockdowns which continue to inhibit the ability to restart the economy and businesses that contribute to a nation's economic upliftment.

From a leadership perspective, unfortunately, Governments have not always taken their citizens and many businesses into their confidence and the broader public normally finds out the latest restrictions through Government announcements with no opportunity to influence the amended regulations. This has caused significant frustration for many sectors including the aviation, travel and tourism sector, which, it is acknowledged has been of the most profoundly impacted by this pandemic.

## VACCINE ROLL OUT OPPORTUNITY FOR COOPERATION

An area of opportunity for Government and the private sector to work together is in respect of the vaccine roll-out. Throughout the world, Government is insisting on leading the roll out in their country and being in complete control of the process. With the certification of a wide range of vaccines becoming available, the imperative must be for as quick a roll out as possible. States must be ready to get the vaccines administered as quickly as possible to their population. The private sector has indicated its willingness to assist, but it would appear Government is reluctant to involved the private sector to the extent possible. Private business has shown a great resilience and ability to adapt to changing circumstances and their involvement working together as a team with Government can only enhance and improve the efficiencies of the vaccine roll out.

## THE COVID-19 DISRUPTION AND IMPACT TO AVIATION

One of the continued casualties of continued lockdowns in many States is the negative impact on international civil aviation. Many States have imposed continued travel bans on flights to and from their countries to all States or to some States where they perceive there to be a high risk of transmission of the virus or variants thereof. ICAO and IATA, supported by States and other industry associations, developed the ICAO Civil Aviation Recovery Taskforce (CART) guidelines to ensure the safe restart of international aviation. Whilst States in principle supported CART, its implementation in practice has been limited as many States continue to impose their own rules to the restart of international aviation. This has caused confusion to the travelling public with a hesitancy for customers to make travel plans given the risk that a State may at short notice reimpose a travel ban and disrupt a journey causing disruption and potentially financial loss to several customers. A recommendation is that if States support internationally agreed plans e.g. CART, they should apply them or provide reasons why they are not supported. Both IATA and ICAO and other organizations have published guidelines, apps etc. to enable the successful restart of international aviation, and it is essential that States try to find an alignment of purpose and intent and enable international aviation to re-commence.

Domestic aviation appears to be allowed to continue worldwide, but its growth and development is hampered by the lack of international feed to domestic services. ICAO and IATA have shown global leadership in this area interacting with Governments and airlines to re-start operations. On a

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regional basis, the measures are supported by regional associations, airlines and airports. However, if State leaders and officials persist in making their own decisions feeling they have to do it all themselves, all the efforts of these organizations to open up and restart international aviation, will be further delayed.

Within the aviation industry, all stakeholders have been severely impacted by the COVID-19 pandemic. When lockdown occurred, and flights were prohibited, revenue fell to zero as there were no passengers and no flights, except for essential services and cargo. This impacted airlines, airports and air navigation service providers, civil aviation authorities, travel and tourism agents, and all associated businesses which rely on revenue from passengers and customers who pay for services that feed the businesses across the value chain. Where some flights were allowed to continue and as the start-up commenced in certain areas, revenue was very limited and practically all organizations were loss making during 2020 and this will continue in 2021.

**THE COLLABORATION AND CONSULTATION IMPERATIVE**

Aviation stakeholders do have a common goal – they are in business to successfully and profitably provide a service to passengers to travel to destinations by air and to transport cargo by air. As has been shown by the pandemic, if there are no flights, there are no winners. However, the various stakeholders do have different approaches to achieve the common goal and this is where through leadership and importantly collaboration, preferred win-win solutions can be achieved.

In terms of ICAO DOC 9082, the principle of economic regulation should be an accepted practice whereby the State and Industry reach consensus or agreement on user charges to be levied on airlines or passengers. Either the State or an independent regulator determines the final charge to be implemented, but importantly, the principle of consultation is essential to determine user requirements. In addition, the affordability for both the service provider to finance the development and the customer to pay the charges necessary to enable the service provider to recoup expenditure which was incurred, must be assessed. COVID-19 introduced the dynamic of survival into the mix due to the financial distress experienced by all state owned and private aviation organizations, and all airlines.

Industry Associations and businesses have called for significant financial relief for public and private industry organizations. With a global pandemic cutting across so many sectors of the socio-economic sectors, Governments have naturally had to lead the process. Governments have the responsibility to put the legal framework in place to manage the pandemic. Due to the extreme negative impact on business, it is also only natural that Governments, given that businesses and private citizens pay taxes, have been approached for financial relief. For the aviation industry, relief has been sought either firstly, in respect of cash injection (equity, wage subsidies, or grants), secondly, loans or loan guarantees and tax relief and thirdly, in respect of user charges and fees levied on airlines, requests for reductions, no increases, waivers, deferment of payment etc. In respect of cash injection, Governments have not taken a uniform approach with only some providing assistance, and in respect of user charges, through their government owned service providers, providing limited assistance. In respect of loans and loan guarantees, some facilities were made available, but certain financial institutions have continued to impose stringent loan conditions, making loans an non-viable option for many businesses. It is noted that private organizations within Africa, have not received any significant financial support often citing different conditions to be applied to private businesses. It is recognized that Governments do have a responsibility for their citizens well-being and in many cases, they have had to focus their resources on alleviating poverty and providing support for many citizens who are destitute due to job losses or having to survive on significantly reduced salaries.

**INDUSTRY LEADERSHIP**

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Industry Associations have a leadership responsibility and mandate from their members to represent them on issues of common interest with Government, public and private stakeholders. This is to enable the individual organizations, in particular CEO's and their executives to concentrate on core matters across their aviation businesses, and in particular during this COVID pandemic, to focus on their survival. Industry association leadership enables the airlines to be represented at engagements with these stakeholders without the airlines themselves having to be represented. The CEO's are themselves leaders of their organizations, and industry associations must always be aware that they act on the behest of their members. Hence it is important for industry associations to consult regularly with their members to ensure that their views and requirements are correctly represented during these discussions.

To ensure the above, it is important to ensure the following. Firstly, there must be an open, transparent, good relationship between the industry association and its members. Secondly, there must be accessibility between the parties to enable consensus views to be formulated and a position to be taken with minimal delays. Thirdly, should airline representatives wish to be part of the discussions, this should be facilitated. Such engagements could entail the following options : the industry association puts together a position paper or sets out the proposed position in an e-mail or at a meeting and requests agreement to the proposal or comments. The Industry Association must be ready to take different views on board and to amend the proposal accordingly. Ultimately a team based solution should be reached. Where this is not possible, dissenting views must be recorded.

It is ideal for consultations to take place between the stakeholders where the above process is carried through to reach a consensus position and a win-win solution. Unfortunately, this can often not be achieved where certain views on process and position are not negotiable for one or the other party. This does not lead to amicable solutions and can lead to the deterioration of relationships between the organizations and results which are unacceptable to one or both parties. Where an independent regulator is charged with making the final decision, both parties agree to subject themselves to the regulator's final decision. If one party feels so aggrieved, then an appeal process is possible, but by that stage, the relationship between the regulator and at least one party would be damaged. Strong leadership is not shown by being intransigent on decisions but on finding a solution that meets most of the needs of all parties.

**DEALING WITH EMBEDDED POSITIONS**

Overcoming embedded interests of some key stakeholders could require a number of alternative actions. Taking fixed positions has probably been more prevalent during the COVID-19 times due to the severe financial impact of the pandemic . As noted previously, Government has taken the lead and makes decisions, often with little consultation, and the position in dealing with COVID-19 is not negotiable. In dealing with Government owned organizations, it is therefore imperative that open channels of communication and access to the stakeholder management is put in place. The aviation industry, needs to debate realistic options and try to find solutions – common sense solutions, or well worked out and motivated alternatives. If there is some flexibility, solutions may be found. It is imperative that all parties understand the current realities that all stakeholders are in, and work to find amicable solutions. Rigid positions will invariably lead to conflict.

**CONCLUSION**

All organizations have leaders. Governments have the legal, policy and strategic responsibility to lead their nations in good times and in challenging times, such as the COVID-19 pandemic. Industry bodies are mandated by the members to represent and lead their position in mutual business interest consultations. During normal business and particularly during COVID-19 pandemic, a general rule must be for leaders of their organizations representing respective

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engage in an open and transparent manner to reach a workable solution. Government must also mandate their representatives to similarly develop mandates through which solutions can be developed in their interest, that of the stakeholders and the community at large. Ultimately new efficiencies need to be incorporated into work practices and a resilience shown to enable necessary change to be implemented. Strong leadership does not mean getting your own way – there may need to be compromise to find a solution in the best interests and ensuring the mutual success of all stakeholders.

- END -

# HERMES
### AIR TRANSPORT ORGANISATION

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## Resilience and efficiency through Leadership and Cooperation

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*By Norman MacLeod*

## Introduction

The global coronavirus (COVID-19) pandemic has placed extreme strain on the aviation industry. However, it has also given cause for reflection on the broader organisation of the sector and current models of governance. The dramatic decline in traffic has stress-tested the financial viability of the industry with companies going out of business, jobs lost, and extreme hardship experienced by most.

An event of the scale of the COVID-19 pandemic is an existential threat at a systemic level. It is an instance of a factor that reaches across borders, jurisdictions, and has effects across the global industry. Any response requires a coordinated approach to hazard recognition, short-term risk mitigation and long-term recovery.

It is important to remember that aviation contributed to the pandemic in two ways:

- Firstly, by facilitating global trade, it forms parts of a system that creates the conditions for zoonotic disease outbreaks and,

- Secondly, by facilitating the rapid transmission of the virus through the carriage of passengers.

The pandemic also cast a harsh light on the harmful by-products of aviation: emissions and vapour trails. Clear blue skies became a hallmark of the first phase of lockdown in many countries. Any lessons we take from this experience must look at the broadest possible picture.

The first section of this paper will address the shared goals of stakeholders, the tensions that arise and the implication of cross-scale effects at a system level. The second section of the paper will deal with governance.

### Stakeholder Goals, Tensions and Risk

What, then, are the shared goals of the stakeholders in the aviation industry and does the achievement of these shared goals benefit all stakeholders? A year after the World Health Organization (WHO) declared COVID-19 for a global pandemic and throughout the ambivalent course of public health management, three main themes can be identified: maintaining trust; ensuring viability and mitigating anthropogenic risk.

Trust is an emergent property of the aviation system and, quite simply, is a measure of the willingness of people and organisations (airlines, shippers, etc.) to board or put cargo on an aircraft. One well-known effect of the 9/11 terrorist attacks was the increase in road traffic fatalities in the United States as travelers chose to drive rather than fly. At an organisational level, we might argue that trust flows from internal processes used to regulate work and to mitigate external operational hazards, usually under the heading of Safety Management Systems. These

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factors are, to a degree, within the control of single business entities. Geopolitical threats (terrorism, regional tension, conflict), atmospheric disturbances on a mega scale (volcanic ash, extreme weather events) and pandemics exceed the capacity of a single business entity and require a response at an international level. It seems that this class of threat is the most likely to increase in frequency and will have the biggest consequences for all. Finally, the Boeing 737MAX experience has shown that regulatory oversight, itself, represents a significant process risk but also one that can have a significant impact on trust.

Commercial viability can be improved through reducing operating risks. Two areas of interest are efficiency and effectiveness. Efficiency gains would flow from increased harmonisation and reduced process risk. Harmonisation includes a suite of activities that result in the seamless operation across jurisdictions (ATC interfaces, global routing, weather avoidance, notification of change, common compliance requirement). Process risk mitigation looks at cost and risk transference meaning when activity in one part of the system creates consequences elsewhere (incorrect documentation and packaging for Dangerous Goods, inaccurate/fraudulent freight forwarder processes, fuel quality monitoring). Effectiveness describes non-revenue impositions such as training, audit and compliance. Unless these activities represent genuine added value they serve merely to act as financial burdens. To this list we should add the implications of emerging airspace usage, such as Unmanned Aircraft Vehicles (UAV) and extra-terrestrial vehicles. Activities such as these will probably result in more, albeit temporary, airspace restrictions which might have implications for traffic routing and, thus, fuel consumption.

Anthropogenic risk flows from the impact of human activity. In this case, the term is used to describe the consequences of aviation-related processes. The most obvious example of risk in this category flows from direct emissions ($CO_2$, vapour trails (albedo), Nitrous Oxide (local effects, global effects)) but we also need to consider carbon budgets associated with infrastructure (construction, operation). Future developments will need to consider the sustainability agenda (lifecycle costs of aircraft, delivery of service, infrastructure) and all regulation should probably tested against this specific criterion. For example, in the area of pilot recurrent training, the onus should be on the regulator to demonstrate why alternative, more sustainable, technologies (networked VR simulation, say) do NOT meet the requirements for accreditation. But the systemic risk here is not simply the direct effects of emissions on climate change, but the implication of shifts in public opinion. First, airline carbon offsetting schemes do nothing to address the historic record on emissions, simply attempting to mitigate the effect of on-going operations. The question is one of moral hazard. In short, will the public continue to tolerate an industry that does not bear its full costs? Linked to this is the issue of employee well-being. As our understanding of the health effects of fatigue and the broader problem of mental health, generally, it is becoming clear that some of the cost of doing business is being borne by individuals and by State healthcare systems. Addressing personnel issues will have implications for business models (asset utilisation, cost of staff turnover, insurance risk)

These three goals of maintaining trust, ensuring viability and mitigating the anthropogenic impact of the industry undoubtedly benefit all stakeholders in the interconnected system of aviation. An issue with systems is that this interconnectedness can create unanticipated problems. For example, post-pandemic air carrier recovery will not simply be a case of revalidating pilot licenses. Competence will have to be rebuilt over time. Grounded aircraft have been subject to degradation and will need more than routine inspection before they can be returned to service. The disruption caused by the pandemic points to a broader set of contingencies for which the industry must plan in anticipation of the next such disruption. In future, Emergency Response Planning (ERP) will need

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to consider longer time horizons so that cross-scale effects and unintended outcomes from recovery management under uncertainty can be accommodated.

Action in support of these shared goals will benefit the industry as whole but there will be local variations in the significance of the goals and between entities in their ability to act in support of the goals. For example, regional differences in investment in infrastructure will affect system efficiency.

Having established three target areas of policy that should contribute to the future of the global industry, in the next section we will look at the challenges of delivering solutions in a competitive environment.

**Governance and the Future of Aviation**

Because of territorial differences in funding, existing infrastructure, level of maturity of the industry and existing states of stakeholder integration and coordination, it is important that work directed at achieving shared goals does not adversely disadvantage groups of stakeholders. Coordination between State versus non-State actors already presents challenges. State National Aviation Authorities operate under resource constraints and even existing oversight requirements can be challenging to meet. Trends towards delegation of aspects of oversight to third parties, to clients (performance-based regulation) and management through compliance regimes runs the risk of weakening oversight. Negotiated, discretionary participation (witness the US's actions in relation to the Paris Climate Accord and the WHO under President Trump) mean that effort in relation to shared goals might not be guaranteed. An uncoordinated approach would make it difficult to preventing entities avoiding restrictions and thereby gaining advantage. Before looking at what a control structure might look like for a future global aviation system, we need to explore new approaches to regulation, generally.

The COVID-19 pandemic caused anticipated stress to risk management at all international levels. Yet, it has revealed a woeful lack of preparedness in most countries. Individual States have elements of an effective response but no State has the complete solution. Although initiatives are now emerging to support the return to normal working (International Air Transport Association (IATA) vaccine passport being an example), there is a need for a single 'future risk' research body that can support contingency planning. Solutions need to be evidence-based. An evidence-based approach is one that looks at all possible interventions and identifies those which will have the most efficacy for a given set of conditions. Importantly, the evidence is provided by controlled trials. Cultural differences as well as access to supplies are influencing vaccine uptake, so any response must be able to accommodate geographic, cultural and temporal variations. An evidence-based approach must be extended to all areas of regulation to support the shared goal of economic viability. For example, training transfer trials over the past 40 years have shown that high fidelity simulation is not necessary for pilot training. The Volpe Research Centre, USA, did work on low-cost motion systems 20 years ago. There are now readily available low-cost networked virtual reality capabilities that could revolutionise pilot training. However, an extensive installed equipment base linked to a regulatory framework rooted in the 1960s is an impediment to innovation, a barrier to entry for new technology and a possibly unjustified cost to the industry. A centralised research capability that addresses the range of challenges to the shared industry goals would lead to compliance regimes directed solely at effective outcomes. Linked to this is a need for improved personnel training, with increased professionalisation of all levels of management in the industry.

A coordinated approach to supporting these shared industry goals will require an entity with both credibility and the authority to act. A Systemic Threat Centre would provide a faster, more agile responses to risk. Responsible for the constant monitoring of significant systemic threats

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(atmospheric, health, airworthiness), the centre would coordinate a research programme, develop responses and providing input to ERP at State and entity level. Recognising regional differences, there would need to be a network of centres empowered to coordinate action and escalate responses as required. The centres would therefore need funding and powers. Such an approach would reduce opportunities for divergence and, hence, reduce unfair competitive advantage accruing to individual States or entities.

The challenge of developing unified responses to system threats is clearly illustrated by the COVID-19 pandemic. While the shift to increasingly contactless processes should act as a catalyst for ever smarter uses of technology, the real issue is how to restore traffic in ways that reduce barriers. Differences in State testing and vaccination regimes, access to individual data, local track and trace capabilities, the implications of inter-State differences in vaccine approval, quarantine requirements and subsequent management all affect passenger willingness, and ability, to travel. Furthermore, it is not clear how differences in vaccine approval might impact the validity of flight crew medical certificates. Finally, unilateral bans on direct flight between countries have resulted in travelers finding alternative routes via the remaining open borders (for example, passengers from South Africa to the UK routing via the Gulf region; because of BREXIT, passengers to the UK from proscribed ports of embarkation can land in the Republic of Ireland and cross the open border to continue to the UK via Belfast). Although IATA has launched its Travel Pass, which brings together data about a passenger's test record and current vaccine status, the concept of a 'vaccine passport' is highly contentious in many States. An industry response would need to be able to offer authoritative guidance on dealing with these issues, accepting that the risk of providing poor advice would be catastrophic. Guidance must accommodate local variations in capability.

Of course, such is the political nature of an individual States' response to a pandemic that enforcement of a code of coordinated best practice would be problematic. Unfortunately, arbitrary impositions act in ways similar to non-tariff trade barriers. They represent a constraint on the limited existing opportunities, impede recovery and afford opportunities for protectionist policies. The experience of the WHO during the current pandemic illustrates the challenges faced by a UN body working in a dynamic situation with uncooperative stakeholders. In some ways, the problem reflects the challenge of an organisation that is essentially designed to create policy and to coordinate but with limited executive capabilities, always dependent upon support for Member States. Any future systemic risk structure will need global reach, must have independence but must also have executive power, the ability to arbitrate and, also, to sanction if necessary. Working through trade or military alliances might offer executive power but will only offer piecemeal coverage and present too many political obstacles. An independent agency sponsored by key stakeholders should be the goal.

The Financial Stability Board (FSB) offers an analogy we can look to for an international institutional innovation body that can provide future leadership. Like the FSB, a future Global Aviation Stability and Recovery organisation will need top-level commitment from all States and be staffed by recognised experts. It must be independent and have a duty to actively create solutions appropriate for the needs of all States. It will, ultimately, need powers of intervention, although recourse to a Court of Arbitration, such as that of the World Trade Organization (WTO), might suffice.

**Conclusion**

The threat of significant disruption to global aviation, even an existential threat to large segments of the industry is a reality. In order to sustain a viable aviation sector, the industry needs to be able to

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respond quickly and, more importantly, with interventions that will have maximum efficacy while recognising differences between geographic regions and types of operation.

An effective response would be predicated on sound, research-driven policies. There needs to be effective regular, communication with stakeholders. There also needs to be a 'professionalisation' of management in aviation such that local implementation of action is more reliable. Caution is needed, however, to guard against cross-scale effects that might result in unintended outcomes propagating across the system. To meet the future needs of the global aviation system, two agencies are required.

First, there is a requirement for a research body that is tasked with creating a future risk register that identifies both emerging threats and potential hazardous conditions based on current trends. The body will examine emerging technologies and models of collaborative behaviour to potential solutions and suites of responses. The goal will be to have repertoires of prototypical solutions capable of being rapidly scaled up in the event of a crisis. The research body will undertake original research, coordinate research through networks of experts and test the products of research to ensure that recommendations are evidence-based.

Second, control must be exercised through an agency that has global reach, has executive powers and has access to meaningful sanctions. The suggested Stability and Recovery organisation would provide the leadership needed in a time of crisis. The agency must be capable of independent, impartial action. Enforcement must be either directly through its own court of arbitration or facilitated through agreements with other executive agencies. The purpose of this agency is to guarantee equitable response that support the global industry in a crisis.

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## AFCAC's POSITION PAPER ON AIR TRANSPORT RESILIENCE AND EFFICIENCY THROUGH LEADERSHIP AND COOPERATION IN COVID-19 PANDEMIC SITUATION

Presented by AFCAC

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**Introduction – African Aviation Industry**

Aviation in Africa is a driver of socio-economic development of Africa. Aviation supports over **60 billion US dollars** in economic activity and **over 7 million** direct and indirect jobs in Africa according to ATAG report on Aviation benefits. In addition, aviation in Africa has the potential to open up markets, facilitate trade, link Africa to the rest of the world and contribute to the socio economic integration of the continent.

The COVID-19 impact on African Civil aviation industry can be summarized as **39 million in 2020** vs **74 million in 2019** of international passengers and **15 million in 2020 vs 41 million in 2019** of domestic passengers' reductions as depicted by the ICAO's report on the Economic Impact Analysis of COVID-19 as at 10 March 2021. This translates to massive losses in revenues to the entire African aviation value chain – airlines, airports, ANSPs, States etc

Ensuring collaboration and securing the necessary level of uniformity in regulations is recognized in Article 37 of the Chicago Convention. During this COVID-19 pandemic that has affected global aviation systems, it is important that actions taken by all aviation stakeholders to respond to the pandemic observe Article 37.

**Discussions**

**Shared goals of the aviation industry stakeholders**: Aviation Safety and Security anchored on an economically viable and environmentally sustainable framework and implemented in an orderly fashion is a key shared goal for global aviation systems. Achieving these shared goals in a coordinated way that meets agreed international standards and in a way that is not discriminatory to any State or stakeholder is a priority for AFCAC.

**Leadership Role in decision-making:** Aviation systems are inter related, however there exists various stakeholders and associations that play equally important roles to support aviation. In the African context for instance, AFCAC plays a leadership role in supporting African States in achieving international standards and also in ensuring the sustainable development of air transport in Africa. There are various associations that promote and lead interests of airlines, ANSPs, airports among others in Africa. The success of African aviation is achieved through close collaboration among these associations and stakeholders.

**COVID Pandemic:** The ICAO CART Phase III notes that the COVID-19 crisis has required States to confront difficult trade-offs associated with health, economic and social challenges. The resources available in response to emergency needs are often limited and characterized by high political pressure and urgency.

African aviation like in other regions is important and crucial in the fight against the pandemic. The global distribution of emergency and humanitarian supplies including the vaccines will no doubt depend on an economically viable aviation system. Aviation is also capable of stimulating recovery and growth of national economies by acting as an enabler and multiplier of economic activity.

It is therefore imperative that all the States of the world implement the ICAO CART Phase III recommendations and guidance which has taken note of the latest development of the COVID-19.

**Resilience and Efficiency through Leadership and Cooperation**

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The global aviation industry operates as an interconnected ecosystem. The Preamble of the Chicago Convention captures the important need to develop international civil aviation to preserve friendship and understanding, reduce threat to general security and establish international air transport based on equal opportunity, operated soundly and economically.

**Therefore;**
In these COVID-19 pandemic era,
Proof of vaccination should not be a prerequisite for international travel. Implementation of the ICAO CART and Africa Union High Level Task Force recommendations should be the priority. Imposing unilateral conditions will bring disorder and pro long the already difficult recovery of civil aviation from the pandemic.

In the African context, AFCAC has developed a comprehensive wok plan for the recovery and resilience of African aviation in coordination and cooperation with aviation stakeholders. Stakeholders and partners planning to support African aviation should do so under this Joint Action plan so as to optimize resources and avoid duplicative efforts.

The shared goals of the aviation industry in Africa being to foster sustainable development of Air transport, enhancing aviation safety, security and environmental protection supported with a sustainable human resources development for African aviation and a strong rule of law in the African Aviation Industry. AFCAC plays the leadership role in matters aviation on the African Continent by supporting African States in achieving international standards and in ensuring the sustainable development of air transport in Africa. AFCAC is making deliberate efforts to implement various Declarations, Decisions, Regulations, Guidelines, Roadmaps, Plans of Action, and Targets that have been developed and adopted to facilitate the sustainable development air transport in Africa.

In this regard, AFCAC in coordination with AUC and other stakeholder agencies like IATA-Africa, AFRAA, UN-ECA, AfDB and RECs, is engaged in advocacy programs that addresses factors that impact against national solutions to sustainable development and growth of air transport in Africa including political, institutional, planning, financial, technological, technical expertise, capacity building, and human resource development, infrastructure development, proliferation of taxes, regulatory constraints, amongst others.

And consequently come up with a framework that enable the AU Member States to adapt to the advantageous trend of multilateralism in the air transport sector which is now a consequence of globalization and reap from benefits inherent in the Single African Air Transport Market (SAATM) and the African Continental Free Trade Area (AfCFTA) through the full implementation of the Yamoussoukro Decision (YD) to let the vision of the AU Agenda 2063 pull all of us together.

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**IFATSEA Position Paper on Resilience and Efficiency through Leadership and Cooperation**

Presented by IFATSEA

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## Crises calls for Leadership and Resilience

The Corona pandemic is currently not only bringing the global economy to its knees but is hitting the global economy with full force.

Share prices crash, public and economic life is restricted by the state - the Corona pandemic has hit the global economy with full force.

Now, in such critical times, it becomes apparent whether corporate success is sustainable. Leadership and resilience are required.

For companies, the crisis can mean a drop in orders, liquidity problems, short-time work and, as a last consequence, possibly also the necessary adjustment of cost and personnel structures to secure the existence of the company or to save it through the crisis.

More specifically, in the area of Air Navigation Services and especially Corporatized ANSPs, the fact of relying on the income from route charges within a cost recovery basis and not being allowed to build capital for a crisis time, had kept them away from building resilience. State help has almost invariably been used to ensure corporate survivability.

## Ensuring the continuity of the company

For companies, the order of the day is "business continuity management", i.e., ensuring the company's continued existence. Especially in times of crisis, managers bear an enormous responsibility for their employees and, despite difficult decisions, must have a great deal of tact in dealing with employees. Many employees are not only unsettled, but also have fears, for example, of infection or job loss.
Maintenance areas may also be affected due to cost cuts or inability to travel. It must be noted that ICAO after many years refocused on the Navaid periodic tests and certification with a State letter effectively addressing ATSEP tasks (including Preventive and Corrective maintenance).

In order for managers to be able to act professionally in times of crisis, they need crisis competencies. Practical crisis competence requires professional competence (broad-based knowledge and skills), social competence (dealing with employees) and personal competence (dealing with crisis oneself). Important leadership qualities in a crisis are:

- Positive thinking and confidence,
- Maintaining calm (internally and externally),
- Maintaining priorities enabling Safety and efficiency of operations
- Empathy (emotional, social and mental skills),
- Courage and determination to make decisions,
- Communication skills,
- Confidence in one's own strengths (professional knowledge and practical experience)

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### Keeping an eye on your own behavior

At present, it is especially important for managers to keep a cool head and not let themselves be led by emotions and corporate management pressure. Personal misconduct could further fuel the crisis at the company level.

Especially in crises, negative reaction patterns often emerge. These normal human patterns should be accepted and not be repressed or faded out. It is important not to fall victim to these patterns of behavior, but to recognize them and take countermeasures (e.g. close exchange and association with others).

### Building crisis competence through learning

To deal with a crisis in a resilient way, one should neither take it lightly nor fixate exclusively on possible risks and negative effects. One should also recognize the opportunities. For example, there is an opportunity for managers, companies, and employees to learn from crises.

Crisis competence can ultimately only be built up through learning and practice. In this respect, the current crisis is a challenge, but also a learning and practice process for the state and companies, from which as many insights as possible should be drawn.

### Admitting mistakes

This also requires an evaluation after the crisis. Experience shows that there is resistance to this because of fear of uncomfortable insights, reflection and discussion of misconduct or loss of prestige and status. Responsible leaders are self-critical and aware of the fact that without admitting mistakes, learning and improving is not possible. Here, the corporate culture is also crucial: How has the company dealt with mistakes so far? An open crisis follow-up is the most effective preparation for the next crisis and building resilience and crisis stability of companies and managers.

The current crisis shows once again that companies must attach more importance to leadership in crises. People are always at the center of crises. Therefore, crises are not only about leadership processes and leadership methods, but also about leadership with a vision, goals and values.

Leaders should therefore pay attention to the following:

- common goals
- values and interests
- Motivation
- commitment
- interpersonal relationships

These points provide orientation, security and support in crises and thus form an essential contribution to operational crisis stability. Continuous training (competence development) is important to support this.

## Resilience and Efficiency through Leadership and Cooperation in the context of Air Traffic Management and Regulations
## of the European Union (EU)

Resilience and Efficiency through Leadership and Cooperation is lacking or inefficient from political decision makers in the EU.

More specifically, the actual way to implement the "Single European Sky" is a top-down approach together enhanced with the idea of fragmenting all Air Navigation Services as it is promoted by the recent regulations 2017/373 and the revisiting of the unsuccessful SES2+ Legislation Package. Also, the promotion of the idea of competition of services is displaced in a naturally given monopolistic safety critical infrastructure like Air Traffic Management. Sadly, despite the redrafting of the regulation and the COVID crisis, it does not include tools or processes that will enable the Financial Resilience of ANSPs.

First steps regarding Resilience leadership in Air Traffic Management were officially taken by the Eurocontrol White Pater on Resilience Engineering for ATM.
The following definition can be found there:
"Resilience is the intrinsic ability of a system to adjust its functioning prior to, during, or following changes and disturbances, so that it can sustain required operations under both expected and unexpected conditions".
Other definitions go in the same direction.
As it was state by IFATSEA we provide Air Navigation Services and especially CNS/ATM system services irrespective of the number of airplanes in the air. And naturally ATSEP are on duty 24/7 to provide System Management and Control.

## Resilience Leadership

Resilient leaders could sustain their energy level under pressure, to cope with disruptive changes and adapt. They bounce back from setbacks. Leadership is sustainable only if individuals and teams can consistently recover high energy levels.

What is resilience?

Resilience is the human capacity to meet adversity, setbacks, and trauma, and then recover from them to live life fully. Resilient leaders can sustain their energy level under pressure, to cope with disruptive changes and adapt. They bounce back from setbacks. They also overcome major difficulties without engaging in dysfunctional behavior or harming others.

They all basically say the same thing. It is about being prepared for any incidents as best as possible and reacting to them as quickly as possible.

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There is a Eurocontrol project called "Expect the Unexpected", which has been discussed and presented by ANSP safety experts, but never implemented due to cost reasons. The whole thing served the self-promotion of individuals to show how advanced they already are in this area.

The day-to-day action looks much more sobering. Lack of personnel, lack of know-how, obstruction of internal audit teams, organizational interpretation of safety regulations and requirements that are only met on paper, among other reasons, make it difficult to loop back possible errors and misjudgments.

Safety and security management under cost pressure always ends in patchwork. Even the states themselves, including the regulators, often look the other way to avoid hindering an important branch of their own economy.

Since the EU was unable to move forward a new path has been taken since 2016:

In addition to the ATM Master Plan, the European Airspace Architecture Study and the Airspace Study Transition Plan developed by SJU, were adopted by the EU Parliament.

The ideas for this were originated in the SESAR Administrative Management Board. Then the Wise Persons Group was created. The heads of international organizations such as IFATSEA, ATCEUC, IFATCA and ETF were invited to interviews to provide their operational and technical input. IFATSEA participated in all European fora, let it be ATM MP, AAS, and others, with proposals and opinion submissions. In fact, letters were sent to all European institutions e.g. COVID and ANSP economic resilience related, on Cybersecurity, Artificial Intelligence, and technical enablers like the ATSEP WP for systems SMC.

**Regulatory Framework as an enabler**

Due to the decision in the SES regulations from 2004 to involve the industry more closely, on the one hand, and the project developments from SESAR, on the other, it became clear that the Interoperability Directive 552 from 2004 had to be updated.

The EU Regulation 552/2004 was then also partly withdrawn in September 2019 but continues to apply in some articles until a successor regulation comes into force at the end of 2023.

As a result, it is now possible to separate the actual function (application), from the technical hardware and have this executed potentially by external parties to the integrated (bundled) ANSP model (contracted activities).

Now the proposal from the ATM Master Plan, the Airspace Architecture Study and the projects planned at SESAR are possible to be implemented, provided that the regulatory issues, including liability and sovereignty, can be solved. It must always be kept in mind that according to the Chicago Convention Article 28, the ANS Systems are a responsibility of the State. It must also be kept in mind that regarding the infamous Unbundling is to be done only on a voluntary basis,

In fact, instead of continuing referring to "unbundling", which would have meant a complete separation of services between themselves, as in the previous documents, they now mention the word "decoupling".

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Decoupling, as a new notion, means that a service provider can continue to have several certificates for each different service provision. However, the individual services are to be regarded as independent services that can be used as desired in the European ATM network and hold separate accounts and Economic certificates.

One option emerging by optionally separating the ANSP application/service from the actual hardware, it is now possible to have the hardware operated by external companies who provide the processing power (e.g., Data Centers). However, since private companies naturally focus on profit, security and especially safety will suffer, despite appeasements to the contrary as they are not Safety related or Certified.

Regarding Safety, the Air Navigation Service Providers who offered technical services were responsible for them until a couple of years back. However, by changing the requirements for all ANSP providers in the recent 2017/373, only the ATS providers are legally responsible for everything, all others must only perform a "Safety Support Assessment" and pass this on to the respective ATS provider. Moreover, since the 2nd amendment of ICAO Annex 19 Safety Management, only the ATS is clearly required to adhere with Safety management requirements while it remains obscure or undefined for the rest of the ANSPs, from the ANS Domain.

However, since the ATS providers lack the technical know-how and, due to the separation of the technical systems from the applications, the hardware can be operated by external parties, a decisive criterion is missing from the safety management system. Air Traffic Safety Electronics Personnel (ATSEP), who know the interrelationships of the interlocking systems, and are the only professionals allowed to put into or take out of operation ANS systems including software are left out.

Again, external companies, such as cloud operators, have employees who are specialists in their field but have no idea about Air Navigation Services and safety. Thus, a latent critical for safety issue may arise where, ATS providers and external companies will work together in the future without any aeronautical technical background.

Resilience leadership is massively hindered here, although no one involved publicly admits it or is willing to take it seriously into account due to potential and not always justified claims of cost reduction. Attempts are made to find solutions, but these are always directed toward savings (money). It appears that Safety plays only a subordinate role.

In the security (cyber security / IT security) area and critical infrastructure, the situation is not better. It must be noted that the ANS area is not a classical situation with networked PCs like any other e.g., banking system. The information presented to the ATCO working position and the pilot in the cockpit, is a combination of data but also Signal in space either by ground or space-based CNS/ATM systems.

The new EU SECURITY regulations obliges states to enact a national regulation in which the critical infrastructures are defined, and their handling is regulated. The responsibility is borne by the respective state which in the case of Cyber Security has appointed a CERT Computer Emergency Response Team.

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In the event of a cyberattack on air traffic control infrastructure, this CERT now intervenes in the responsibility of air traffic controllers and ATSEP but only for the ground networks.

The new European AMC for ATSEP Training have been recently updated with the contribution of IFATSEA and now include ATSEP Tasks related to Cybersecurity. In the definition of the required tools for the ATSEP WP developed by EGHD of the EC, but also, in the context of the new European research context for CNS/ATM provisions, have been suggested by IFATSEA that were adopted by the EC that deal with the Cybersecurity requirements in the AAS and ATM MP proposed environments.

We suggest creating a security ATSEP training stream that will provide the required competences to them as they are responsible for the safe operation of the CNS/ATM systems and services. In this way they will become a reliable partner with the corresponding security know-how of the CERT as they have air traffic control know-how and can understand the impact of remedial actions on the air traffic controllers and technical services.

We proposed this on behalf of IFATSEA at a meeting with EASA, which was initially not taken up.

Meanwhile, a rethinking process has taken place and an ATSEP Security Subgroup has been established under the ATM / ATS group of the Stakeholder Advisory Board, which generally handles security training objectives for ATSEP.

On the one hand, because of the delegated responsibility of the air traffic control staff and the efforts of individual stakeholders to reduce the costs to the detriment of safety and security, our concern was to bring this issue to the ICAO, to create appropriate documents to make flying as safe as possible, Safety should always come first and not be lowered for financial reasons.

Considering the delegated responsibility of both technical air navigation services and air traffic control staff and the increasing efforts of individual stakeholders to reduce costs in detriment of safety and security, we maintain our intention to bring this issue to ICAO to take the appropriate measures for the best assurance of safety standards in aviation. Finally, our aim is to stress and support that resilience and efficiency through leadership and cooperation shall be instrumental to put safety first without compromising it for financial reasons.

*IFATSEA considers that ATSEP are critical contributors in the safe, efficient, and secure delivery of the Air Navigation Services to all related stakeholders. Technical outages can have a cost in human life but also and more frequently on the cost efficiency of ATM. Higher competencies for ATSEP are required, on the basis of a scientific background (just think of AI driven ATM applications), and can help the thriving of business and the economic sustainability of ANSPs.*

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## Resilience and Efficiency through Leadership and Cooperation

Presented by AFRAA

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## Introduction

Africans make up 16% of the world's population but only 2% of the world's passengers. Prior to March 2020, aviation in Africa supported over 63 billion US dollars in economic activity and employed around 7.7 million people directly and indirectly according to ATAG 2020 report on Aviation benefits. In addition, aviation in Africa has the potential to open-up markets, facilitate trade, link Africa to the rest of the world and contribute to the socio-economic integration and prosperity of the continent. Simply, aviation is a driver of socio-economic development of Africa.

The COVID-19 significantly reduced international passenger traffic from 74 million in 2019 to 39 million in 2020. Domestic traffic was also adversely impacted – 15 million in 2020 compared to 41 million the year before, according to the ICAO report on the Economic Impact Analysis of COVID-19 (March 2021). The decline in traffic translates into massive losses in revenue to the African airlines and all players in the aviation value chain. AFRAA estimates that African airlines made a revenue loss of US$10.21 billion in 2020 due to the impacts of the pandemic.

Global 20-year traffic forecast by IATA at the end of 2019 suggest Africa with over 1.3 billion people was one of the fastest growing air transport markets in the world. Currently, air connectivity is limited but the progress being witnessed with the implementation of the Single African Air Transport Market (SAATM); the Africa Continental Free Trade Area (AfFTA) and the protocols on free movement of people and goods are clear indications of the opportunities that lie ahead for aviation growth. In anticipation of traffic growth and to ensure African airlines are well positioned to be key beneficiaries, AFRAA in partnership with one of its partners is developing a Connectivity Index. This is a solution that can be queried to know the connectivity gaps, traffic capacity and potential. Such a tool will make it easier for airlines to evaluate routes profitability and make the rights decisions on launching new routes.

## Pursuing shared goals

Like elsewhere in the world, the aviation business in Africa has many stakeholders drawn from some government departments/agencies, travelling public, and business community, service providers and airlines. Though the overall goal of all the key actors in the travel value chain is to ensure a smooth, efficient and safe passage of travelers, sometimes this is difficult to achieve because of conflicting interest, leadership style and governance structures. For instance, handling passengers by airlines and airport authorities calls for a high sense of customer-centrism. On the contrary, the work of the security agencies and safety oversight providers at airports demands strict adherence to rules, regulations and guidelines that may have little room for compromise. This calls for different leadership approaches, which could breed conflict. To minimize potential leadership challenges, it is recommended that leadership establish a joint coordination team that meets regularly to discuss and reach decisions on how each should complement the others. In countries where such joint coordination exists, each stakeholder has fair opportunity to contribute to the attainment of the shared goals of the industry without undue interference. Together, they also have a better work environment and are likely to meet customer expectations.

## Who bells the cat?

The complex nature of what constitutes aviation makes it difficult to single handedly hand down leadership to a person or institution and expect the rest to fall in line. The best approach might be to

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cluster the industry in related activities and establish a coordination framework that facilitates regular consultation and interaction among players.

At the country level, the regulatory and security functions which are the preserve of governments should be led by the civil aviation authority with oversight from the supervising ministry. At the operations level, there should exist a multi-sectoral economic oversight body made up of representatives from airlines, airports, Air Navigation Service Providers, ground/cargo handlers, immigration, customs, port health, security, tourism, etc. Again, this body should be led by the civil aviation authority to avoid conflict of interest situation arising from the commercial interest by some of the players on the team.

At the sub-regional and continental level, the strengthening of capacity of the aviation desk of the Regional Economic Communities (RECs) to enable them play the two roles below will be critical.

First, the RECs should lead efforts aimed at harmonizing aviation regulations, taxes, travel requirements, airline eligibility and set benchmarks for safety, security, infrastructure, trade and tourism facilitation. This will ensure that within each REC there is homogeneity in the way aviation business is undertaken. The harmonized regulations and benchmarks set must however be in alignment with the tenets of the Yamoussoukro Decision (YD).

Secondly, for purposes of continental alignment, the RECs will serve as liaison with the African Civil Aviation Commission (AFCAC) on all regulatory and policy matters involving aviation in their regions. The Project Implementation Unit of the Executing Agency of the YD will be the main point of engagement by the RECs at AFCAC. By this, AFCAC will have first-hand information on all aviation development matters across Africa through an established feedback mechanism agreed upon with the RECs. In a similar vein, AFCAC will also provide support and guidance to the industry through the RECs and onward to the stakeholders in each country. AFCAC's role in the implementation of SAATM goes beyond its regulatory and capacity building role to CAAs through States. It involves (or should involve) providing support and direction to the entire industry in consultation with States and the RECs.

Admittedly, the level of aviation development is not even across the continent, therefore chances are that some better endowed aviation countries/regions may want to take advantage of the rest. This has the potential to undermine the common good of African aviation. To avoid this happening, AFCAC as the executing agency of the YD and SAATM implementation may have to look at the structures of and possibly borrow from other regions and some global alliance groups like Star Alliance, One World, Skyteam. In these groupings, there are safeguards that ensure equitable and fair competition. There are also punitive provisions that discourage abrupt disruption of operations or unilateral decisions that could have collateral damage on other members. Borrowing from and Africanizing what already works in the EU or among the global alliance groups well in advance of the SAATM full rollout will be helpful in avoiding headwinds as we move forward. Leadership should be provided by AFCAC working in consultation with the AUC to ensure the rules of engagement are adopted at the continental level to avoid undue disruption of operations and the associated negative consequences.

**Lessons from the Covid-19 Pandemic**

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The Covid-19 pandemic is a crisis of unimagined proportions. Though a lot of multi-sectoral work was done to in response to the pandemic and restore confidence in travel, much of it was panicky and not very impactful at the beginning. Covid-19 had far reaching effects and tested the very foundation of aviation globally. So much work has been and continue to be done. However, as the pandemic was unanticipated by existing organizational structures/systems it exposed some weaknesses in leadership and the industry's agility to coordinate effective response. The result is the widespread misconception of aviation as carrier and global distributor of Covid-19 virus and consequently the disruption of air travel, tourism and the hospitality sectors. The damage caused will take a long time to fix but not without significant casualties.

Travel restrictions by Governments in a bid to curb the spread of the pandemic negatively impacted demand for air travel and disrupted supply chains thus resulting to adverse consequences for the air transport industry. There seems to be over-reliance on States to decide for the industry with or without consultation. Oftentimes, governments choose not to consult even when it may be evident aviation will bear the biggest brunt. Could this be due to the lack of strong institutions to provide alternatives to governments for consideration? Probably! But in crisis of the proportion of Covid-19, the priority for governments was first to safe lives, curtail transmission and find a cure. So the reaction was to be expected, especially when the impression was created across Africa that airlines were the main mode of moving the infection across borders. To date, though the ICAO CART Guidelines and passenger testing has provided some respite, the perception is still strong that open borders could lead to high incidence of Covid-19 infections.

For an industry that has collectively not made a profit in over a decade, the fundamentals for aviation in Africa are weak. Stakeholders require investments and concessions from governments and the private sector if airlines in particular, are to continue operations for longer. Already some 6-7 airlines are in liquidation and it is expected more will join the frail soon unless coordinated support action is taken.

While the crisis in the aviation sector following the pandemic, exposed the lack of real leadership and coordinated action by sector players, it also triggered some knee-jag reactions by some institutions and organizations. A careful evaluation of what transpired since March 2020, could help us fix the leadership challenges and get the industry better integrated and aligned in good and bad times.

The aviation industry stood helpless while their business was brought to a standstill. No timely alternatives or counter measures to what governments were imposing came from the industry.
Going forward, there needs to be engagement of stakeholders by governments in policy-making to enable stakeholders offer constructive suggestions prior to the making of critical decisions impacting the industry. This is an institutional as well as collective responsibility of AFCAC, AFRAA, AASA, ACI-Africa, CANSO, etc. These organizations subsequently came together under the auspices of the AU and AFCAC, prescribing 15 Recommendations for the recovery of the industry. Leadership by States is key in the implementation of the recommendations to assure a successful recovery of the industry. Indeed, the work of the Africa Aviation Industry Group (AAIG), a body consisting of associations/organizations representing the commercial entities in the aviation value chain in Africa may have a role to play in interfacing with governments to advocate for the industry and develop policy.

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In a highly competitive and capital-intensive aviation industry, African airlines are required to establish efficient and effective strategies to gain leverage in the market. Optimum leadership and management are also required to maximize on profitability. One of the ways to make this possible is through data-driven studies that are aimed to build winning strategies and business plans to achieve the airlines' goals. Among AFRAA's strategic objectives is to become a hub for data intelligence and expertise on the African Aviation Industry. African airlines have to keep up with the developments through proper information management and data intelligence. AFRAA has realized the need to be the real voice of the industry. It is currently turning our regular performance statistical updates on the industry and forecasting future trends. Through AFRAA Consultancy and Training Units, the Association is assisting to bridge the capacity gap not only in airlines but also airports and allied businesses. With AFRAA in the lead, financial and logistical support is needed to deliver more.

**Leadership that Bites**

The starting point to having the leadership that makes binding decisions is at the AUC level. Today, the AU lacks the legal mandate to make decisions that are binding on its 55 member states. The risk of this to the aviation sector is the inability of AU to represent continental Africa in negotiating or challenging decisions may not be in the interest of Africa. For instance AU lacks the mandate to negotiate multi-lateral agreements that are binding of individual states unlike its counterpart the EU. As a consequence, individual states are saddled with the onerous duty of going into multilateral air service negotiations with the EU – a situation of David versus Goliath. This presents individual African States a weaker bargaining position. This is further complicated by the variations in the final air services agreements reached by individual states with the EU.

The lack of harmonization in air service agreements is a threat to the implementation of SAATM and the AfCFTA. Therefore, a critical step is to amend the statutes of the AU receding individual states right to negotiate multi-lateral agreements and entrusting the AUC to do so on behalf of all 55 States. Knowing Africa, this will be difficult to achieve considering how highly States uphold their sovereignty. But can some authority be ceded in AU to enter into binding agreements for players in the aviation sector? Until Africa has a representative body that can commit all states to multi-lateral treaties and agreements that are binding and enforceable, we will not have a leadership that bites.

The February 2021 landmark agreement reached by the ECOWAS Head of States summit to perk the cost of Covid-19 PCR test to not more than US$50 for ECOWAS citizens points to what consensus among leadership can do for their sub-regions or the continent. Though implementation of the decision remains problematic, the consensus reached on such a critical matter is commendable.

Another recent development that has the potential to be a game-changer for Africa aviation advocacy and lobbying is the Africa Aviation Industry Group (AAIG). It serves as a joint industry think-thank for aviation advocacy and lobbying. Its membership includes AFRAA, AASA, IATA Africa, ACI-Africa, CANSO, Boeing, Embraer, among others. Though this body currently lacks the mandate to make policy decisions, it could use the power of its advocacy to push forward the collective agenda of the aviation industry and act as pressure group to require action by States and other entities.

At individual level, each African state needs a permanent body that represent the various aviation and tourism stakeholders. Such a body will elect leaders and meet regularly to discuss developments in the industry and make recommendations to governments and the CAA. What exist

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currently are Boards of Airline Representatives (BARs) whose scope is narrow and limited to only airlines operational issues. The mandate and structure of the Economic Regulator under the CAA could be broadened to handle country-level aviation development issues. The Economic Regulator could then be charged to lead implementation and reporting of collaborative decisions of the industry. For efficient delivery, such a body aught to be independent of the CAA.

**Conclusion**

Leadership is everything. Without the right type of leadership and institutions that are mandated to champion the common interest of Africa aviation, success will continue to elude the business. Unfortunately, Africa has hanged on to the aviation as was practiced in the 1960's and 1970's while the rest of the world has moved on. The lack of leadership is further manifested in the failure to collaborate and cooperate in manner that will deliver better value than individual states or businesses can attain.

At the continental level, an AU capable of leading negotiations with third countries on behalf of Africa is critical going forward.

At the sub-regional level under the auspices of the RECs, coordination of regional level implementation and reporting will be needed. RECs will need an enhanced mandate and improved capacity to lead and coordinate aviation stakeholders to bring about alignment.

The regional organizations too have a role to play by leading industry and governments better appreciate the impact, needs and expectations of stakeholders. This they can do by strengthening their research and analytical capacity and re-organizing their delivery structures to be agile and thorough. AFCAC as the Executing Agency of the YD, can be empowered to lead coordination, delivery at the continental level. It already has established working arrangements with the RECs and States. These can be further aligned and resourced to deliver better.

At the state/country level, a restructured economic regulator with a broader mandate and scope of operation would be helpful in driving the common interest of airlines and stakeholders and ensuring that neither industry nor state interests are compromised.

Finally, coordinated efforts and a collaborative approach amongst all stakeholders is critical to ensure effective leadership and business continuity of the industry.

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## Resilience and Efficiency through Leadership and Cooperation

Presented by A4A

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Airlines for America (A4A) is the principal trade organization for the U.S. airline industry[1] and has consistently supported the need to establish a coordinated COVID-19 pandemic response. We believe that the continued recovery of aviation and increased resilience of global governance frameworks are dependent on two equally critical elements:

- 1) ongoing and frequent engagement by industry stakeholders; and

- 2) improved cooperation and collaboration between governments worldwide.

Additionally, industry actors must commit to having an open dialogue with relevant government agencies regarding the multiple layers of protection – including operational policies and procedures – implemented by the industry to mitigate risk, convey the effectiveness of such measures, and emphasize the need to explore additional risk-based, data-driven measures.

It is vital for the future of the aviation ecosystem that the necessary lessons are learned from the ongoing crisis, in particular the need to provide a more robust and complete scientific evidence base. This should consider the effectiveness of measures taken by national governments at various stages of the pandemic to restrict and contain COVID-19, the operational and technical measures taken by the aviation industry actors to provide a safe travel environment for passengers and crew, and the role that individual travellers play in being part of the solution.

**SHORT-TERM GOAL: FINDING A WAY OUT OF THIS CRISIS**

The inconsistent approach taken by each region throughout the COVID-19 pandemic has led to fragmented policies regarding travel restrictions and preventative measures. This patchwork not only adds costs that hamper recovery but also creates uncertainty for businesses and travellers throughout the world. To this end, we offer the following short-term initiatives requiring immediate international coordination as the industry continues to navigate through recovery phase challenges:

**• *Implementation of Global Guidance***
It is critical that existing guidance, such as that produced by ICAO CART, is implemented by all participating nation states to allow for a more coordinated approach to the resumption of travel. We need a framework that facilitates travel internationally with the least number of restrictions possible. The further roll-out of vaccination programs globally should help such efforts.

The pandemic has also highlighted the importance of aviation to the global economy (both passenger and cargo transport), along with the recognition by most governments that it is vital to ensure that logistics chains continue to operate with as minimal disruption as possible. This includes the recognition of air crew and transport workers as part of the critical infrastructure of operating air transport services.

- ***Coordination of Vaccine Certification***
  A global protocol on vaccine certification should be platform-neutral and non-discriminatory, allowing individual organizations/sectors to develop their own solutions that most suit their specific requirements. These solutions need to also allow passengers to quickly and easily transfer the required data to the system of preference of the carrier, airport, authority or other organization requiring this information.
  Systems developed at the regional level must consider the work currently taking place at

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ICAO and WHO in developing principles and standards that provide greater interoperability. In addition, any future restrictions on travel must recognize a valid proof of vaccination to allow maximum travel freedom with a minimum of restrictions, while allowing for those who have yet to receive the relevant vaccination to travel and have certainty of the restrictions that apply in destination[2].

- *Rebuilding Public Confidence*
  The availability of information will be key to restoring confidence in the coming months. Passengers need to have sufficient information on what restrictions apply at their destination, as well as the confidence that this will not change without advance warning and recourse. To facilitate this flow of information, greater coordination needs to take place globally, steered via ICAO, in coordination with the WHO. Ideally, this would include an online resource available to national authorities, airlines, airports and other aviation stakeholders, from which relevant information for a particular route can be easily accessed.

- *Ongoing Information Campaigns on Industry Measures to Mitigate Risk*
  The aviation community must continue to invest in effective awareness and educational campaigns that help inform not only their traditional national agencies but also those who are directly involved in health decisions as well as the traveling public. Ongoing engagement is required to ensure that the steps being taken by the airline industry are recognized and to assure political stakeholders and, most importantly, the traveling public that it is safe to fly.

  In a study undertaken by the Harvard School of Public Health[3], scientists concluded that the multi-layered measures undertaken by airlines – including the use of HEPA filters, the universal use of face coverings, enhanced cleaning protocols and updated operational procedures – significantly reduced the risk of transmission of the COVID- 19 virus. In fact, the research showed that being on an airplane is as safe if not significantly safer than other routine activities like eating at a restaurant or going to the grocery store.

A second phase of the Harvard Aviation Public Health Initiative also showed that layers of protection implemented by airports are significant to lowering the risk of transmission. Studies such as these are vital to push back against the misinformed narrative that flying is a risk for travellers.

The aviation ecosystem has put vast amounts of resources into building resilient, low risk operations. Collectively, we need to ensure that this is well understood across government agencies, as this is particularly important in the prevention of future crises. Data on what is effective and what is not effective will be vital in helping the new aviation ecosystem evolve and be more resilient. Feedback is crucially important in tackling the future evolution of this challenge.

**LONG-TERM GOAL: ACHIEVING COLLABORATIVE AND LEADERSHIP PRACTICES**

In addition to strengthening and expanding existing international structures (exemplified during this crisis by the ICAO CART process) to allow for greater industry participation and sharing of operational experience and expertise as well as first-hand knowledge on impact and best practice, all governments should re-evaluate their domestic preparedness and crisis response frameworks. There is great room for improvement in involving industry participants in information rounds and providing quick and responsive communications channels, particularly on the operational level.

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Leadership and collaboration take on different forms depending on the situation. The EU instituted a network of national transport contact points, first response contact points through which industry could effectively and rapidly signal operational concerns. In the U.S., a group of aviation industry stakeholders, led by A4A, engaged the Harvard School of Public Health (as noted above) to conduct an independent study to evaluate the current layers of protective health measures across the air passenger journey to determine science-based efficacy as well as general and relative risk; consider additional methods to mitigate risk of transmission; and instill public confidence. The project brought together existing research on the aviation environment and protective measures in place with what was known specifically about COVID-19, included contributions from stakeholders across the commercial aviation ecosystem and considered existing ICAO, IATA and government-issued guidelines.

The success of this collaborative project in the U.S. was due to five principles[4] followed in achieving the industry's shared goals in an equitable manner and to the benefit of all stakeholders. The intent of the principles is to rally people's collective instincts to coalesce and contribute to the resolution of a crisis that imperils them all. The five principles of Swarm Leadership applied to this project were as follows:

1. **Unity of mission**: The public health safe resilience of the aviation industry.

2. **Generosity of spirit and action**: Each of the stakeholders had to be willing to contribute their time, commitment, and changes in order to reach combined industry progress.

3. **Everyone stays in their lanes and help others succeed in theirs**: Airlines, manufacturers, and airports had to commit to public health safety in plans and actions to enhance the combined protection of the traveling public.

4. **No Ego - No Blame**: The effort had to be a shared enterprise, in which no one stakeholder dominated the good that evolved, and no one was blaming others for the problems. Sounds easy. It is very difficult in a multi-stakeholder effort in the midst of a high-consequence crisis.

5. **The Foundation of Trusting Relationships**: There are many unknowns in a crisis. There is also a great deal of risk. It is critical to know that others involved are truth tellers, putting their cards and motives on the table and that everyone is rowing in the same direction.

What was remarkable about this achievement with the Harvard Aviation Public Health Initiative was that various entities participating in the collaborative project were direct competitors. And yet, on this topic, they were all ready and willing to collaborate toward a common good: the public health safe resilience of the aviation industry.[5]

This is a model that the aviation community could consider in the future on a global scale. Hermes could take on a leadership role and bring together industry and international organizations to harmonize practices that can then be advocated to governments around the world.

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[1] Members of the association are Alaska Airlines, Inc.; American Airlines Group, Inc.; Atlas Air, Inc.; Delta Air Lines, Inc., Federal Express Corporation; Hawaiian Airlines; JetBlue Airways Corp.; Southwest Airlines Co.; United Holdings, Inc.; and United Parcel Service Co. Air Canada is an associate member.

[2] The EU has recognized this principle in its Digital Green Certification proposal, which recommends that passengers traveling with a valid vaccine certificate should not be subject to additional travel restrictions, opting therefore to provide the framework for testing certification as well as recovery from infection certification for travelers.

[3] https://npli.sph.harvard.edu/resources-2/aviation-public-health-initiative-aphi/

[4] There are five principles of Swarm leadership – a phenomenon in which no one is in charge and yet all leaders follow the same principles and rules to accomplish more together than any one leader could alone. The Boston Marathon Bombings required leaders of many agencies – scattered over numerous jurisdictions and with different authorities and priorities – to rapidly respond together to an unknown and complex set of risks, decisions, and actions. This report analyzes their leadership through the event. It seeks to understand how they were able to effectively lead an operation with remarkable results. These outcomes are measured in lives saved, suspects quickly captured, public confidence maintained, and population resilience fostered. These leaders were observed to exhibit "Swarm Intelligence". https://cdn1.sph.harvard.edu/wp-content/uploads/sites/2443/2016/09/Marathon-Bombing-Leadership-Response-Report.pdf

[5] Leonard J. Marcus, Ph.D., National Preparedness Leadership Initiative, a joint program of the Harvard School of Public Health and the Harvard Kennedy School of Government, Center for Public Leadership.

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**Resilience and Efficiency through Leadership and Cooperation
Position Paper by DG MOVE**

Presented by European Commission

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## Introduction

COVID-19 has had an extremely profound impact on our lives for more than a year now. All sectors across the global economy have been severely affected but no sector has been harder hit than aviation. In March 2020, this unprecedented crisis which dwarfs previous shocks, such as the 2008 global financial crisis or 9/11, has turned upside down what used to be vibrant aviation markets around the globe. Prior to the outbreak of the pandemic, aviation transported passengers in record numbers, reaching more than 4.5 billion passengers in 2019 (ICAO), and provided unprecedented levels of connectivity and consumer choice. Beyond that, the aviation industry, traditionally prone to cyclical shocks and razor-thin margins, had managed to improve its profitability and collectively posted sustained profits for several years in a row (IATA). In addition, and very importantly, aviation had also stepped up its commitment to greening the sector to make its contribution to fight climate change.

The outbreak of the pandemic has completely reshaped the state of the sector overnight, resulting in a near total grounding of the global fleet last spring, and radically reduced traffic and passenger numbers since then. For 2020, this has resulted in -60% of global passenger numbers, and a massive USD 370 billion loss of gross passenger operating revenues for airlines alone (ICAO). There are significant differences among regions as well as types of services and operations when it comes to the impact of COVID-19. Inter-continental and international air traffic has been hit particularly hard. Europe has been faring worse than other regions, with 769 million passengers fewer than in 2019, and a USD 100 billion lossin gross passenger operating revenues for airlines alone (ICAO). Currently, air traffic in Europe remains at only one third of flight movements compared to 2019 (Eurocontrol, April 2021) with less than a fifth of pre-crisis passenger numbers travelling through European airports (ACI, March 2021).

## EU aviation: a success story

To understand the current crisis, and develop the appropriate responses it is important not to lose sight of the importance of aviation for Europe. Aviation stands out as a European success story and as prime example of the benefits for European citizens of the EU single market. Trough progressive liberalisation since the late 1980s paired with high standards and common rules, we have achieved one of the most integrated and successful aviation markets in the world. Through the market opening and more competition, Europeans from all corners of the Union have come to benefit from connectivity at competitive prices. As a result, aviation plays a hugely important social and economic role in Europe. What used to be a privilege of the few, is now affordable to millions of Europeans. Air transport has been a driver of social and regional cohesion and air connectivity gives competitive edge to the European economy.

This is not to claim that pre-COVID-19 everything was perfect in European aviation. Far from it. Already pre-COVID, aviation growth was not sustainable and it was hampered in various ways. In several aspects, aviation had become a victim of its own success, above all concerning aviation emissions, airport capacity constraints but also linked to airspace capacity, congestion and the still untapped potential of completing the Single European Sky. Overall, however, European aviation has been an overwhelming success story. For the European Commission, it is therefore crucially important to preserve the benefits of the EU Single Aviation Market also after the current crisis. COVID-19 must not cause long-term damage that jeopardises the successes of the EU's Single Aviation Market. Instead, we must work together to preserve the conditions for its benefits and transition aviation to becoming a sustainable, resilient and smart transport mode. This notably requires overcoming the crisis by restarting, recovering and building resilience.

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## Leadership and cooperation

Leadership and cooperation, the topics of this call for papers, are naturally at the heart of this process. There is an important role for both governments and stakeholders in that respect. While stakeholder leadership, including industry voluntary action and self-regulation, is often helpful, it cannot be everything and it cannot replace government regulation. The role of governments is to set out the appropriate regulatory framework to govern the marketplace within which commercial operators can compete based on fair and equal opportunities and within which citizens can rely on safe and affordable services and a fair treatment. In doing so, the European Union focuses on the general European interests, which are naturally wider than the interests of individual stakeholders and notably include consumer interests as well as wider economic and strategic interests. If it had been left to some individual aviation industry stakeholders, the European Union would never have achieved the success story of the Single Aviation Market. This is why the European Commission takes all interests into consideration when considering new policies and proposing legislation. These basic principles will continue to guide EU aviation policy.

"*Build back better*" must be the motto – and while it may sound like a cliché it is exactly what policymakers, regulators and stakeholders jointly need to do. Sir Winston Churchill famously said, "never let a good crisis go to waste", and for aviation, possibly even more than for any other sector, COVID-19, with its catastrophic impact, is nothing short of the mother of all crises. Faced with a crisis of such a magnitude, which we will hopefully never witness again in our lifetime, our only option is to see and use the crisis as an opportunity to rethink and reinvent the way global and European aviation is regulated and put on track the right measures to ensure the sector's long-term sustainability.

## The pandemic as a catalyst

The need to recover from a deep crisis can in itself become a powerful accelerator for necessary reform and adaptation to a new normal. The Commission has demonstrated this when providing immediate relief in a very short timeframe in the early response to COVID-19. Measures were developed and adopted at record time in many domains, including health, the overall economy and transport. Aviation specific measures, such as guidelines to maintain the economic lifeline of cargo operations amidst the chaos of uncoordinated border closures, slot relief legislation, guidelines on PSOs and the EASA/ECDC aviation health safety protocol to help restart the sector were all developed within a few weeks. Other horizontal measures, such as adopting the temporary framework for state aid or activating the full flexibility of the EU stability and growth pact also benefitted the aviation sector. Close and good cooperation between the Commission, the European co-legislators, and stakeholders was the key to enabling a quick reaction, in particular also in the field of aviation. Unfortunately, such a well-coordinated response was not possible across all areas. In particular, unilateral and uncoordinated border actions have undermined the impact of the EU's response, put in question the free movement of citizens and to some extent continue to do so one year into the crisis. Whilst cooperation between Member States has improved since the start of the pandemic, it remains essential if we are to tackle effectively the threats we face. The Commission has worked continously to support national efforts since the onset of the pandemic. The measures it has introduced have, amongst others, helped keep essential goods and services flowing, supported national healthcare systems which found themselves under pressure, supported the economy, facilitated free movement of people and crossing of borders and boosted preparedness.

This has permitted to restart air travel and some first steps towards recovery last summer. Yet, the deteriorating epidemiological situation and the panic it has triggered in the autumn serve as a reminder how fragile the situation remains.

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**The importance of stakeholder leadership**

For regulators it is always helpful to receive active stakeholder input when formulating policies, and their feedback from implementing policies and regulations. The Commission has therefore put in place a comprehensive network to consult with stakeholders, including expert groups or public consultations, including in the field of aviation. However, a situation so serious that Europe's long-term connectivity is at risk has brought new forms of stakeholder leadership going beyond the established consultation mechanisms.

Unprecedented challenges require unprecedented responses and measures. COVID-19 has demonstrated that unprecedented cooperation is needed too: cooperation among the EU institutions, among Member States, various ministries (transport, health, tourism etc)and agencies and especially between stakeholders. While the Commission has done its utmost to coordinate the response to the pandemic and to mitigate its socio-economic impact, stakeholders have shown leadership too.

The aviation sector has understood that when it came together, in each and every part, as in the Aviation Round Table to develop a broad and joint vision of what is needed for recovery. Overcoming internal differences, industry, trade unions, consumer organisations and environmental NGOs have sat together to draft the Roundtable Report, laying out a comprehensive strategy of what is necessary so that aviation can again take to the skies. This report is truly innovative, not just in the inclusive way in which it was prepared but also in terms of its content. It is not just about "more of the same", or getting back to pre-crisis ways and means. Rather, it offers a vision of a sector that is stronger, more sustainable and more forward-looking than before.

Especially in the area of environmental sustainability, the report testifies to the sector's clear commitment to reduce its environmental footprint and calls for regulatory measures to help reach this objectice. This commitment goes further than the current position in other parts of the world but has helped reinforce EU actions and cooperation worldwide, notably at the International Civil Aviation Organization (ICAO). In addition, the report emphasises the need to ensure the enforcement of EU passenger rights and consumer potection and calls for reinforced social actions. As regards economic sustainability, the report proposes measures to preserve the single aviation market and its competitiveness including ways to make it more resilient to future shocks as well as to continue pursuing an ambitious external EU aviation policy.

**The EU Sustainable and Smart Mobility Strategy**

As one of the tools to implement the European Green Deal, the Sustainable and Smart Mobility Strategy (SSMS) includes several key proposals for the aviation sector. Business as usual is not an option if we want to preserve a vibrant European aviation market for future generations. The licence to grow of the aviation sector will be very dependent on the sectors willingness and ability in the coming years to seriously address its environmental impact in a responsible and credible way. In the SSMS, the Commission has therefore proposed a number of flagship initiatives to enhance the sustainability of the transport sector, which are also very relevant for aviation. In particular, the Commission will propose a revision of the EU ETS and the implementation of the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) into EU legislation. Looking at the global level, European efforts will also serve to support the work done at ICAO on the establishment of a Long-Term Aspirational Goal for the aviation industry to reduce its emissions. Important work will also be done to include aviation in the EU's sustainable taxonomy legislation. The aim is to provide investors with clarity on investments that qualify as sustainable, and would contribute to supporting the aeronautic industry in its efforts to decarbonise. The large-scale deployment of sustainable aviation fuels (SAF) is a strong pillar of the decarbonisation of

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aviation for the years and decades to come. SAF have high potential to reduce emissions within the sector. In the coming weeks, the Commission will adopt a legislative proposal to mandate the deployment of advanced and e-fuels, and to maintain a level playing field for aviation fuels in the EU aviation internal market. Fostering multimodality is a another key aspect to ensure more convenient and greener journeys and address congestions. The Commission proposals also seek to enhance the flexibility of the ATM sector to accommodate fluctuations and make it more resilient by operationalising more efficient digital technologies. Preserving the benefits of the Single Aviation Market also requires a critical review and where needed update of its many building blocks, including air services, PSOs, computer reservations, airport charges or slots.

Aviation is by nature international, which is why the Commission will continue to deepen aviation relations with key strategic partners to ensure a global level playing field, including through the negotiation of new EU-level air transport agreements. This will serve as a tool to promote EU policy objectives internationally while contributing to the recovery.

**Going forward**

The pandemic will however continue to shape the aviation sector for the immediate future. Once the epidemiological situation allows, the single most important aspect for ensuring the short-term recovery of the sector will be to re-establish consumer trust and confidence in flying while safeguarding public health and passenger safety. The full re-opening of borders both within the EU and with third countries is indispensable in this respect. While the accelerated rollout of vaccines will be a key tool in this regard, vaccination should not become a precondition for travelling. At the same time, once there is sufficient scientific evidence that a vaccinated person does not represent any risk of contagion, that person should be relieved from having to undergo other measures such as testing or quarantine. This could further help travel and tourism to recover. To ensure that the necessary operational and secure infrastructure is in place, the Commission has proposed to establish Digital Green Certificates by June 2021 for proofs of vaccination, testing or recovery from COVID-19. The technical solutions must fit many use cases beyond pure health uses. Transport, including air transport, will be an important such use case which should be able to work seamlessly with other solutions that are currently being developed outside Europe. This is particularly important for the aviation sector, and its strong international focus that sets it apart from other economic activities. The Commission is therefore working closely with international organisations, such as ICAO or the World Health Organization (WHO) to ensure global interoperability.

This builds on the work of the ICAO Council Aviation Recovery Taskforce (CART), which was set up to devise global recommendations in the wake of the outbreak of COVID-19. Convinced that global cooperation and coordination are key to overcoming the pandemic, the Commission, along with EU Member States, and stakeholders, has been active in CART to ensure safe travelling for passengers, seeking to avoid fragmentation and contradictory rules, which would delay the recovery of the sector. The latest update of the CART recommendations put forward the technical groundwork for testing certificates, which will also be used for vaccination certification, and took up the key principles that vaccination must not become mandatory while once the non-transmissibility is proven, vaccinated passengers should no longer be subject to quarantine or testing requirements.

**Conclusion**

COVID-19 has put a severe strain on the European aviation ecosystem and challenged it as we have known it. The current unparalleled crisis requires all actors, regulators and stakeholders alike, to rethink the set up of European aviation to ensure that also future European generations will be able

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to benefit from the Single Aviation Market. It is therefore critically important to use the crisis as an opportunity to put the sector firmly on track towards sustainability. While there are still plenty of unknows on the path to recovery, it seems that currently at least the number of unknown unknows is being reduced. The progressive roll out of vaccines around the globe provides a silver lining on the horizon. The ongoing preparations of the necessary infrastructure for implementing European Digital Green Certificates by June will be critical for the short-term recovery. The crisis has provided valuable lessons learnt also for aviation. The fact that the diverse stakeholder landscape managed to pull together and proactively provided a vision for a sustainble long-term future of the sector, is impressive, useful and bodes well for the future and should, in the Commission's view, be maintained as a working method also after the pandemic. Together with strong regulatory leadership, it can chart the way to a new bright future for European aviation.

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**ACI World Position Paper: Resilience and efficiency through leadership and cooperation**

Presented by ACI

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Last year will go down as the worst year ever in the history of international civil aviation. The COVID-19 pandemic has been a sobering reminder that health is the foundation of social, economic, and political stability, and that the globe is connected as never before. As the industry continues to navigate the impacts and effects of the COVID-19 pandemic, health and safety of travellers, staff, and the travelling public remains an overriding priority.

Our industry will continue to face significant challenges this year, but it is safe to say that we have entered a new phase of the pandemic. There are reasons for optimism: vaccination supply and vaccination rates have increased significantly in recent weeks, a few countries have started easing their lockdowns and, in some parts of the world, falling infection rates show that immunization is beginning to make a positive impact.

While the challenges facing the world and the aviation industry have been significant, the crisis has demonstrated that international cooperation and coordination, between governments and aviation industry groups, have been key to paving the road to recovery. It is this coming together of regulators and stakeholders through the establishment of the ICAO Council Aviation Recovery Task Force (CART) which has proved that leadership and cooperation between all parts of the industry can effectively provide leadership and provide for future resilience, where individual organisations could not. CART has been the main vehicle enabling collaboration among governments, and between governments and industry, which has been vital to ensure synergy and coordinated action which is essential to restoring air connectivity and passenger confidence in air travel.

CART's Take-Off Guidance Document (TOGD), which was developed through broad-base consultations with ICAI Member States, international organizations such as the World Health Organization (WHO), and key industry stakeholders, provides practical and consistent guidance to the industry and governments. It has been essential to underpin globally harmonised measures that will support a safe, secure, and sustainable restart and recovery of the aviation sector.

ACI fully support the updated recommendations issued on 12 March by CART, which highlight the interoperability of testing protocols and proof-of-results certification, vaccination for crew and passengers, as well as on appropriate masks for air travel. In addition, guidance on Public Health Corridors has been updated to facilitate the establishment of such arrangements on a bilateral or multilateral level, which would recognise the role of the industry in ensuring health and hygiene measures throughout the passenger journey. The updated guidance will provide immeasurable assistance in promoting the harmonization of measures being introduced around the world to facilitate the restart of air travel, which will demonstrate that aviation is the key engine driving global economic recovery, most notably in the travel and tourism sector.

The CART recommendations continue to provide strategic guidance to the entire aviation community throughout the COVID-19 pandemic, including in relation to the prevention of the spread of the virus, the operations of critical humanitarian, repatriation, and air cargo flights, and the re-opening of regular air services. From the beginning ACI World has been an active member of the CART, advocating on behalf of our airport members, and we will continue to promote our members' interests, working closely with ICAO and our industry partners, in the effort to build back better.

Soon after the pandemic began to bite at a global level, airports around the world moved fast to introduce many new health-related measures. To help airports in restoring public confidence in air travel, and to promote global implementation of best practice, ACI lead the way by launching the Airport Health Accreditation Programme (AHA). The programme has been a significant tool in

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providing airports with an assessment of airport health measures that are in in accordance with the CART TOGD recommendations and in alignment with the joint European Union Aviation Safety Agency (EASA) and European Centre for Disease Prevention and Control (ECDC) Aviation Health Safety Protocol and ACI EUROPE's Guidelines for a Healthy Passenger Experience at Airports.

The AHA programme continues to meet the needs of our members and demonstrates the airports' commitment to delivering the objectives in the CART Take-Off guidance. It enables airports to demonstrate to passengers, staff, regulators, and governments that they are prioritizing health and safety in a measurable manner while also ensuring harmonization between ICAO global guidance and industry implementation.

Moving forward, governments and industry regulators will need to ensure that any new processes that they require airports to introduce are reviewed in line with changing data and medical evidence and ensure that they remain aligned with those deployed through other modes of transport and the wider society.

The world is changing fast and, while the pandemic's impact on the industry has been far greater than any crisis we had previously experienced, the aviation industry has not lost sight of our top priority: ensuring the highest level of safety and security for passengers and operations.

Safety remains a top priority, and a safe and secure aviation system is crucial to the global recovery. Each stakeholder has a role to play in the end-to-end operation and to ensure an overall high level of safety performance. Airports, as infrastructure providers, have to ensure a high level of availability and reliability of the airport system. A good example of this is the new ICAO Global Reporting Format for runway condition assessment and reporting which will be applicable as of 4 November this year. It has taken many years to come to a globally harmonized format for reporting runway conditions, and should lead to a reduction in runway excursions, one of the most frequent types of accident today. These types of coordinated and harmonized approaches are critical to keep our industry safe and running smoothly.

As we gear up towards recovery, it will be critical to keep focused on the safety performance of the aviation system. All segments of the industry have been subjected to lower levels of operations for over a year, with many of the operational staff on long-term absence or operating on reduced shifts and frequencies. Due to this reduced activity, personnel may not have the same confidence, reflexes and ease when returning to operations at a higher level of intensity.

The successful recovery and resumption of global air transport operations relies significantly on the technical and managerial skills of airport safety professionals and airport civil aviation regulators, and on their capacity to innovate in the face of the many challenges now confronting our sector and the societies and industries it serves.

As in the past, strong leadership and a renewed collaborative effort amongst all industry segments will be key to ensure safe operations for all. To this end, ACI affirms its commitment towards safety to its members and aviation partners and will continue to participate in activities that serve to promote and improve operational safety and managerial excellence of airports worldwide.

The current crisis has made it clear how vulnerable the aviation industry can be to external shocks, and, without doubt, the long-term survival of the aviation sector will also heavily depend on the ability to reset to a more sustainable model that meets the demands of the climate emergency.

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As climate change and the need for sustainable development moves up the political agenda, now more than ever we need to show that aviation is part of the solution, and not part of the problem. ACI has taken a leadership role in developing a long-term carbon goal, and its Long-Term Carbon Goals study is a reflection of our member's commitment to meet the Net Zero Carbon by 2050 goal and the airport community's dedication in leading the industry in taking real and meaningful action.

The future of aviation depends on our commitment to the cause of sustainability and ACI will continue to work with the global aviation sector and stakeholders so that we can be a strong part of the solution.

It is important to note that "the normal" before the pandemic had its challenges that have not gone away. We do not shy away from the role aviation must play in addressing the climate emergency but it is important to highlight the considerable and measurable efforts of the aviation industry in making flying more efficient and more sustainable are recognized. ACI has encouraged airports to keep climate mitigation, adaptation and resilience as key parts of their strategies and recovery plans and identify opportunities to 'build back better' by keeping sustainability and resilience at the core of their recovery strategies.

Climate change remains the greatest challenge facing the world and it will require worldwide collaboration and action. The recovery from COVID-19 offers us an opportunity to show global industry leadership in making the whole industry more resilient than ever. The pandemic has shown how important timely actions are to address a crisis and delaying our efforts to reduce emissions today means more ambitious targets and potentially growth limiting actions will be required in future.

While ACI is dedicated to advancing the collective interests of the world's airports and the communities they serve, we believe that the best way to do this is through cooperation with our partners. The next few years will be crucial in the battle against this historic crisis. We must continue the effort of international solidarity and collaboration, which will be essential for the safe, secure, and sustainable restart and recovery of the aviation sector.

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# Reflections on leadership and cooperation in commercial civil aviation with the purpose of overcoming the crisis derived from the COVID-19 Pandemic

Presented by LACAC

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## Introduction

The global and multidimensional crisis that the COVID-19 pandemic produced requires global and multifunctional solutions. However, these solutions have been fragmented and applied at the level of each sovereign State. The result is that the crisis has lasted longer than anticipated, with a major impact on the commercial aviation industry. Consequently, this sector of the economy, probably the one most hit by the crisis, is experiencing the worst times in its entire history.

The level of uncertainty regarding the end of the pandemic is constant despite the encouraging news of the development of several vaccines that could produce herd immunity in the long term. However, the speed of the production of vaccines and of people effectively getting it is, so far, less than the speed with which the virus spreads and continues its mutation process.

Reflecting on the leadership needed to overcome this crisis, it is clear that the recovery of the harmonization of the applicable regulations in international air transport and the management of various interests is an unavoidable task in this period.

In December 2020, a LACAC-CAAS High Level Roundtable was held, in which directors and representatives of the senior management of the aeronautical authorities of Latin America and the Caribbean, with the support of the Aeronautical Authority of Singapore, reflected on restarting civil aviation and building resilience. The reflections and conclusions of that meeting serve as the basis for this document.

It should be noted that this document tries to portray a common position, however, in the times of uncertainty that currently exist, it serves more as a contribution to the reflections already in progress. In other words, it illuminates a part of a still unfinished discussion, regarding the role that leaders play, the way in which greater cooperation can be achieved, and what we must do to improve the response to future crises.

## Shared objectives of international civil aviation and harmonization of interests

The history of commercial aviation shows that, from the beginning, there has been an effort to achieve goals common to all actors in the "air transport ecosystem," a broader term than "commercial airline industry." The essential place of cooperation, where coordination decisions have been made among States by gathering opinions from all sectors (public and private), has been the International Civil Aviation Organization - ICAO and its main organs, the Assembly and the Council.

Regional organizations, such as LACAC, have served as a coordination forum for States to prepare and refine their presentations to ICAO. A similar process has been developed in other organizations and observers, so that, with the active participation of various actors in ICAO bodies, decisions can be harmonized resulting in the establishment of common objectives in our sector.

It is feasible to affirm, then, that ICAO's strategic objectives are also shared objectives in the aviation industry at a global level, which are to enhance global civil aviation safety, increase the capacity and improve the efficiency of the global civil aviation system, enhance global civil aviation security and facilitation, foster the development of a sound and economically viable civil aviation system, and minimize the adverse environmental effects of civil aviation activities.

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The COVID 19 crisis prompted the right and valuable action of the ICAO Council to establish the Council Aviation Recovery Taskforce CART, where all actors have agreed on objectives, principles, and procedures to overcome this crisis. These measures are related to aviation, public health, security and facilitation, and economic and financial measures, among others. A common goal was quickly agreed between the actors: the need to build a more resilient air transport system. The awareness that in the future we will have similar crises again motivates us and also forces us to design resilient institutions as a common goal. In this sense, it should be added that it is crucial that, in the future, civil aviation does not lose the harmonization of the measures that make international air travel possible and feasible.

In general terms, the correct implementation of the aforementioned objectives benefits all the actors of the international civil aviation ecosystem and prevents one actor having an advantage over others. However, it is pertinent to continually review the plans and global or regional programs that seek to achieve these objectives, because through them, even when there is a good intention, some actor could be in disadvantage due to a specific measure.

The aforementioned happens because it is normal for there to be conflicting interests between the parties, especially in a system as complex as international civil aviation. In addition, economic and environmental issues always arouse a great debate, and the attempt to harmonize interests can cause contradictions in the short term.

The best way to avoid or reduce situations that generate disadvantage due to some measures is to maintain a frank and open dialogue, where the various stakeholders can express their apprehensions with transparent procedures, with access to the relevant information of each process.

The continuous review of the measures adopted to achieve the shared objectives is a task that must be addressed with due periodicity in each of the instances that coordinate common actions in the civil aviation system or in the industry, and then take them to the bodies of ICAO.

**Leadership and decision making**

ICAO's leadership on making recommendations for the implementation of public policies for commercial aviation is undisputed. In addition, it should be mentioned that crises put leaderships to the test and that these are renewed and validated as they overcome obstacles. In a crisis, you tend to look for leaders who show a way forward. ICAO has been successful in using inclusive leadership in creating CART and making this information available to all stakeholders.

Although a sample of the success described are the documents prepared by CART, part of the pending challenges is that we have not been able to regain harmonization in the sector. Indeed, the implementation of CART recommendations is a complex task that has not been able to be put into practice globally. The States, based on the principle of sovereignty, maintain dissimilar measures that are not adequately coordinated with others. Without mentioning an exhaustive list, the explanations of the above can be summarized as follows:

     1. Decision-making came from the aeronautical sphere, and they are at the mercy of the health policies adopted by the States.

     2. Public opinion, in general, better understands the measures that protect people's health than those that promote economic activity, however, the need for everyone is to keep economic activity alive.

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3. With few exceptions, the multidimensional crisis of COVID 19 has resulted in a loss of trust in public and private institutions. This lack of trust translates into political crises that are added to the health and economic crises.

The way to break the non-virtuous circle that this generates is to maintain a single voice in the sector. The leadership to achieve an adequate balance between health measures, and at the same time, to progressively aid the economies of the countries, where the recovery of aviation plays a substantive role, requires the generosity of all the actors of the aeronautical system in order to achieve cooperation and coordination.

Additionally, there are several signs of fatigue in the population that show that the strictest quarantine measures have been losing effectiveness. This gives way to begin to develop the idea of the adaptation of people to new conditions, generating new habits- an opportunity opens up to achieve new balances.

The role of global, regional, and local leaderships requires a great pedagogical exercise to explain, especially to the authorities that are not from the aeronautical world, the consensual measures in CART and the need to apply them. They must reinforce the idea that unilateral measures that close borders or impose quarantine conditions, which do not allow commercial air traffic, should be avoided. The above, however, requires an adequate risk assessment in order to maintain the strategy that will finally lead us to the end of the pandemic through the herd immunity generated by the ongoing vaccination processes in several countries.

**Cooperate to achieve the progressive reactivation of commercial aviation**

The response to a global and multifunctional crisis varies between countries in this region and the world at large. It has not been an easy answer, and there are only a few cases of success. In general, progress has been made in trial-and-error processes. Leaders have opted for the solutions that are available: quarantines or border closures.

The best way to move forward in these types of difficult-to-answer situations is to simply deliver as much information as possible to the community. Without underestimating the importance of maintaining health measures that protect the population, it is also necessary to progressively adopt measures so that the economy can be reactivated, and for this the air transport system has to be operative.

In different forums on aviation, the common idea is that the best way out of the crisis is through cooperation. It seems to be quite obvious that, in this time of crisis, the multilateral response is the correct one to efficiently face the threat of the pandemic. However, it is also evident, after a simple observation, that exactly the opposite occurs. The response has been and continues to be primarily one-sided. Therefore, cooperation is subject to only some shared policies. The dominant strategy is non-cooperation, and this leads to a loss of global welfare that in the medium and long term will make us pay a much more expensive price than if we were able to cooperate.

Unfortunately, cooperation, given the current scenario, is difficult to achieve. It takes enormous effort to go back, then go forward, and go back again to go forward one more time and eventually repeat this sequence. In countries where the aviation industry has managed to get financial support, the situation has been somewhat simplified, but when this does not happen, only effective opening through shared measures would improve the situation of this ailing sector.

To illustrate the point above, imagine a theater on fire. Everyone runs to the exit door, but the doors can only open inwardly. If everyone keeps pushing, the doors will stay closed. It takes a tremendous cooperative effort to get everyone to stop pushing and back off so that the door can be opened. It is extremely difficult for people to collaborate in such circumstances. Then, if non-cooperation predominates, because each party pursues its own interest, what could be done to change the situation? It requires opening the door of the burning theater from the outside, so that it would be possible for everyone to go out. For this, a leadership with enough strength is required to break through that door.

Cooperating and maintaining transparency in the delivery of information allows for the adaptation of institutions and people to new conditions. Thus, it is possible to regain confidence in the aeronautical system. This is not an automatic process, but it can take place quite quickly in the coming months as the flexibility of the interposed measures increases and thus facilitates commercial aviation operations.

**<u>Preliminary conclusions</u>**

1.- ICAO's response to the crisis, through inclusive leadership by establishing CART and its recommendations has been a successful initiative. The concern is to effectively implement these recommendations so that an institutional structure is generated that aids the recovery of the air sector.

2.- The continuous review of the measures adopted to achieve the shared objectives in the industry is a periodic task and must be developed in all the available instances, including CART, to coordinate actions in the civil aviation system or in the industry that prevent the collision of interests.

3.- It is necessary to activate the leaderships of the aeronautical sector to develop a pedagogical explanation regarding the need to adopt CART recommendations based on harmonized measures. It is especially important to direct these explanations to the authorities that are currently making the most relevant decisions, which are not in the aeronautical sector.

4.- The structure of interests, even beyond the commercial aviation sector, facilitates the adoption of unilateral policies instead of multilateral ones, which delays the recovery of both health and the global economy, and therefore the commercial aviation sector is especially affected. It is pertinent to use all available leadership and direct the initiatives at the highest possible level for each country in order to achieve cooperative solutions.

5. Leaders must maintain a single voice in the sector, in other words, a common discourse, which progressively helps the recovery of air transport for the benefit of the social and economic development of the countries.

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**Resilience and Efficiency Through Leadership and Cooperation**

**Introduction**

*Last year will go down as the worst year ever in the history of international civil aviation.*[1]

*Just as aviation recovered from previous crises, the industry will recover again from this pandemic, but for this recovery to happen quickly, all stakeholders have to align as best possible.*[2]

*Leadership is everything.*[3]

The theme for this year's aviation discussion, initiated by Hermes Air Transport Organization, is "Resilience and Efficiency Through Leadership and Cooperation." Fourteen (14) briefs on this theme were received from various aviation organizations. This report attempts to distill the key observations from the briefs to arrive at recommendations for the aviation industry as it moves forward from the COVID-19 pandemic.

In soliciting the briefs from the aviation organizations, Hermes asked that three (3) major questions be considered as follows:

- What are the shared goals of the stakeholders in the aviation industry?
- Who should assume a leadership role in industry decision-making?
- Are there cooperative arrangements that could be put in place to guide individual state actions?

The responses to each of these questions are discussed, in turn.

**Shared Goals in the Aviation Industry**

As noted in the brief by AFRAA, since the COVID-19 pandemic was unanticipated by aviation organizations, it exposed weaknesses in industry leadership and the ability of aviation to coordinate an effective response to the pandemic. However, once these coordinated efforts were underway, there were goals shared by several industry and governmental associations. These included the following:

- Restore confidence in the safety of the aviation system. This involves taking measures to increase safety. The AACO brief cites the safety of air travel and notes that 97.1% of

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[1] ACI World Position Paper: Resilience and Efficiency through Leadership and Cooperation.

[2] ERA Position Paper: Resilience and Efficiency through Leadership and Cooperation.

[3] AFRAA Position Paper: Resilience and Efficiency through Leadership and Cooperation.

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infections are locally generated and that only 0.0000004% of infections occurred during air transport. It is paramount that the safety procedures implemented in the industry and the safety record of aviation be conveyed to the public and to policymakers.

- Conveyance and management of timely and relevant safety information. A key to the restoration of confidence in the aviation system is the transparent conveyance and management of information on aviation safety to the public.[4] For example, the ACAO brief states:

  *The path to establishing a more resilient aviation system is based on comprehensive communication, including the establishment of close, transparent and continuous communication between all stakeholders, as well as towards the public. Coordinated and clear information and an emphasis on safety, security and operational integrity of aviation systems will enhance compliance with actions taken to reduce risks and help develop resilience to crises while addressing recovery and demand growth.*

- Keep infected passengers away from flying. Although viral transmission may be rare during flights, the JAATO brief notes that aviation contributed to the COVID-19 pandemic by transporting infected passengers around the globe, thus leading to the spread of the virus. As a result, a shared goal of the industry is to keep infected passengers away from flying. There are several ways that this can be done; for example, through rapid testing or the use of "green passports". The proposed methods may vary across the different regions, but the overall goal of keeping infected passengers off airplanes is universal.[5]

- Coordinate safety initiatives. Some briefs received by Hermes expressed frustrations with unilateral state actions that closed borders and restricted air traffic. The AASA brief is illustrative of this sentiment, stating that during the pandemic, "we have seen the most amazing display of the use of state authority to enforce regulations … to impose restrictions and measures to control their citizens in ways not considered possible in an open society." The brief recommends that governments abide by internationally agreed plans or provide reasons why these plans are not embraced and/or supported.

- "Build back better" is a common goal mentioned in several of the briefs. The IFATSEA brief, for example, notes that the pandemic has created the opportunity for managers, companies, and employees to learn from the crisis. Quoting Winston Churchill, the European Commission discussion paper further intones, "never let a good crisis go to waste."  The briefs note that the pre-pandemic aviation system had significant problems; for example, the EUROCONTROL brief states that the aviation industry was already under tremendous pressure prior to the pandemic with flight delays and an aviation management system, "struggling to deliver enough airspace capacity and cost-efficiency, and unable to advance on key dossiers, particularly regarding the slow pace of delivering the Single European Sky (SES)." Other briefs cite the environmental record of the aviation industry. Along these lines, in his interview with Hermes Magazine, ICAO Council President Salvatore Sciacchitano states, "The post-COVID period will no doubt provide aviation with

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[4] The EUROCONTROL brief, for example, notes the provision of "think papers", weekly assessments, dashboards and daily data tweets.

[5] The AFCAC brief, noting the importance of safety measures is aviation, is quite adamant that proof of vaccine should not be a prerequisite for international travel.

a tremendous opportunity to build back better, to recover greener. This is an opportunity to accelerate the transition of the global air transport network toward its decarbonized future."

- Make better use of technology. Certainly, one way to build back better is to focus on the realization of technological advancements. For example, although privacy and fairness are major issues, using technology to increase the efficient and safe movement of passengers and cargo is a shared goal of the associations. Digitalization and the effective use of Artificial Intelligence were also extensively discussed in the 2020 Hermes report.

**Leadership in Industry Decision Making**

To achieve the goals cited above, there must be cooperative initiatives in the aviation industry and these initiatives require leadership to be launched and to succeed. Several briefs note the leadership of ICAO during the pandemic, especially through the ICAO Council Aviation Recovery Task Force (CART), that provides a forum for determining risk management strategies for the industry. ICAO, in conjunction with other intergovernmental organizations, such as the World Health Organization (WHO) and the United Nations World Tourism Organization (UNWTO), will undoubtedly continue to lead in determining how best to operate aviation safely, efficiently, and environmentally following the pandemic.

Other initiatives have taken place at the regional level. For example, the European Aviation Round Table (ART) developed industry proposals to facilitate aviation post-pandemic. The LACAC brief describes a roundtable, in which directors and representatives of the aeronautical authorities of Latin America and the Caribbean, with the support of the Aeronautical Authority of Singapore, discussed how to restart civil aviation and build resilience in the industry and its related business ecosystem.

The main shortcoming of the initiatives is not lack of leadership, but the failure of states to implement the guidelines and policies enunciated through these collaborative efforts, resulting in inconsistent, unpredictable policies, even within regions. EUROCONTROL writes: "State actions during COVID have shown that different legislative frameworks across Europe create a patchwork of confusing and fragmented measures. Without coherent legislative frameworks, the airlines in particular but also the associated industry partners do not have the certainty and predictability that they need to return to profitability and then to grow in a sustainable manner." These views are echoed by ERA: "The current patchwork of restrictions across Europe is still, one year later, causing confusion among Europe's travel and tourism industries, its workers and passengers. Lack of predictability on these measures effectively impedes air transport connectivity, which puts employment at risk across the sector. Unilateral approaches implemented by the Member States inevitably risk harming the EU both economically and socially." A similar situation exists in Africa, as stated in the AFRAA brief: "Travel restrictions by Governments in a bid to curb the spread of the pandemic negatively impacted demand for air travel and disrupted supply chains thus resulting in adverse consequences for the air transport industry. There seems to be over-reliance on States to decide for the industry with or without consultation."

Therefore, the way forward from the COVID-19 pandemic is not only to determine effective leaders – ICAO, industry associations, and regional organizations can certainly assume this mantle, but to

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better ensure that the guidelines put in place at forums initiated by these leaders are followed by the relevant authorities.

## Cooperative Agreements

There is widespread sentiment among the industry and governmental groups that cooperative agreements need to be established to guide the industry in the post-pandemic world. Although there are debates over the content of these agreements, the associations recognize that the current "patchwork" system of regulations that have developed during the pandemic are inefficient, inequitable, and unsustainable. The U.S. airline trade group, A4A, for example, states the following:

> *We believe that the continued recovery of aviation and increased resilience of global governance frameworks are dependent on two equally critical elements:*
> *1) ongoing and frequent engagement by industry stakeholders; and*
> *2) improved cooperation and collaboration between governments worldwide…*
> *The inconsistent approach taken by each region throughout the COVID-19 pandemic has led to fragmented policies regarding travel restrictions and preventative measures. This patchwork not only adds costs that hamper recovery but also creates uncertainty for businesses and travelers throughout the world… It is critical that existing guidance, such as that produced by ICAO CART, is implemented by all participating nation states to allow for a more coordinated approach to the resumption of travel.*

As noted above, the major issue is having governments and other decision makers follow international guidelines. With this in mind, JAATO proposes a "future risk" research body that will support contingency planning and provide evidence-based solutions to potential industry problems, such as how the industry should respond to the next pandemic. Certainly, an independent organization that can proactively conduct research into risks assessment and mitigation for the industry could be useful when confronting governments contemplating unilateral actions in crisis management.

## Recommendations

Based on the briefs submitted to Hermes Air Transport Organization, it appears that the industry is quite unified in its shared goals to restore confidence in aviation and to build back a better industry. There is strong sentiment, as well, that intergovernmental and inter-industry associations should lead the post-pandemic recovery. Finally, cooperative initiatives are seen as key to developing guidelines for recovery.

With these thoughts in mind, the following recommendations are proposed:

- Develop ongoing cooperative research initiatives for risk assessment and risk abatement. Evidence-based research can be key to reducing threats to the industry from unilateral state initiatives in crisis management, as well as in providing important information to disseminate to the public, the policymakers and all other involved stakeholders.

- Continue industry initiatives under leading organizations, most notably ICAO, to develop industry guidelines and protocols to enhance safety and efficiency and boost confidence and morale in the airline industry.

- Build back better. Although the COVID-19 pandemic contributed an unprecedented blow to the aviation industry, it also represents an excellent opportunity to build back better. Therefore, the industry should further the cooperative initiatives developed during the pandemic to implement innovative technologies and procedures, both evolving and disrupting. These will facilitate aviation processes, contribute to safety and security, increase efficiency, and reduce the environmental footprint of the industry.

As climate change and the need for sustainable development moves up the political agenda, now more than ever we need to show that aviation is part of the solution, and not part of the problem. Such aggressive targets as the development of net zero carbon goals will help assure the right kind of conscientiousness from our industry.

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