

Présentation par Mme. Annaleen Bobb, Responsable régionale de l'Association du transport aérien international (IATA), du Programme de travail de l'IATA.



ANNALEEN BOBB
AREA MANAGER, CARIBBEAN

Our mission is to represent, lead and serve the airline industry. 



Special Meeting for Transport
October 15th, 2016, Port of Spain, Trinidad.

- 
- A circular view from an airplane window showing a blue sky with white clouds.
- AN OVERVIEW OF IATA
 - ECONOMIC OUTLOOK
 - REGIONAL CHALLENGES
 - IMPORTANCE OF PARTNERSHIPS





OVERVIEW



- 
- GLOBAL TRADE ASSOCIATION FOR THE WORLD'S AIRLINES
 - 265 PASSENGER AND CARGO CARRIERS
 - 84% OF GLOBAL AIR TRAFFIC
 - 63 OFFICES IN 60 COUNTRIES
 - REGIONAL HUB IN MIA
 - 10 COUNTRY OFFICES ACROSS THE AMERICAS
 - 1,500 EMPLOYEES



GLOBAL STANDARD SETTING

FINANCIAL SETTLEMENT	\$387B	99.99%
FINANCIAL SAVINGS	REDUCE COSTS AND INCREASE EFFICIENCY ACROSS THE AVIATION VALUE CHAIN	\$17B
ADVOCACY	OPERATIONAL	REGULATORY



PASSENGER RIGHTS, CONSUMER PROTECTION, UNRULY PASSENGERS



SAFER FUNDS



TAXATION & CHARGES



VALUE OF AVIATION



ATC & AIRPORT INFRASTRUCTURE



SMARTER REGULATION



AVIATION ENVIRONMENT





ECONOMIC INSIGHTS



9.8 MILLION PASSENGERS



104,000 FLIGHTS

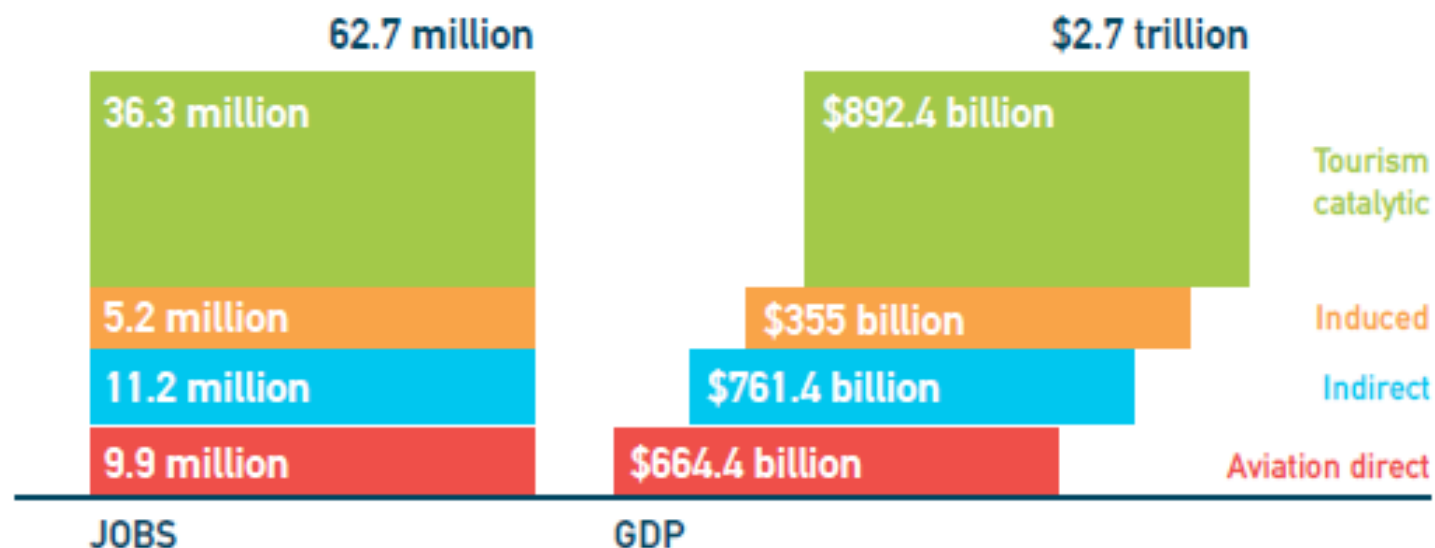


\$18.6 BILLION WORTH
OF GOODS CARRIED



Beyond the industry

Aviation's global employment and GDP impact, 2014



62.7 MILLION

Jobs supported by aviation worldwide

\$2.7 TRILLION

Aviation's global economic impact (including direct, indirect, induced and tourism catalytic)

3.5%

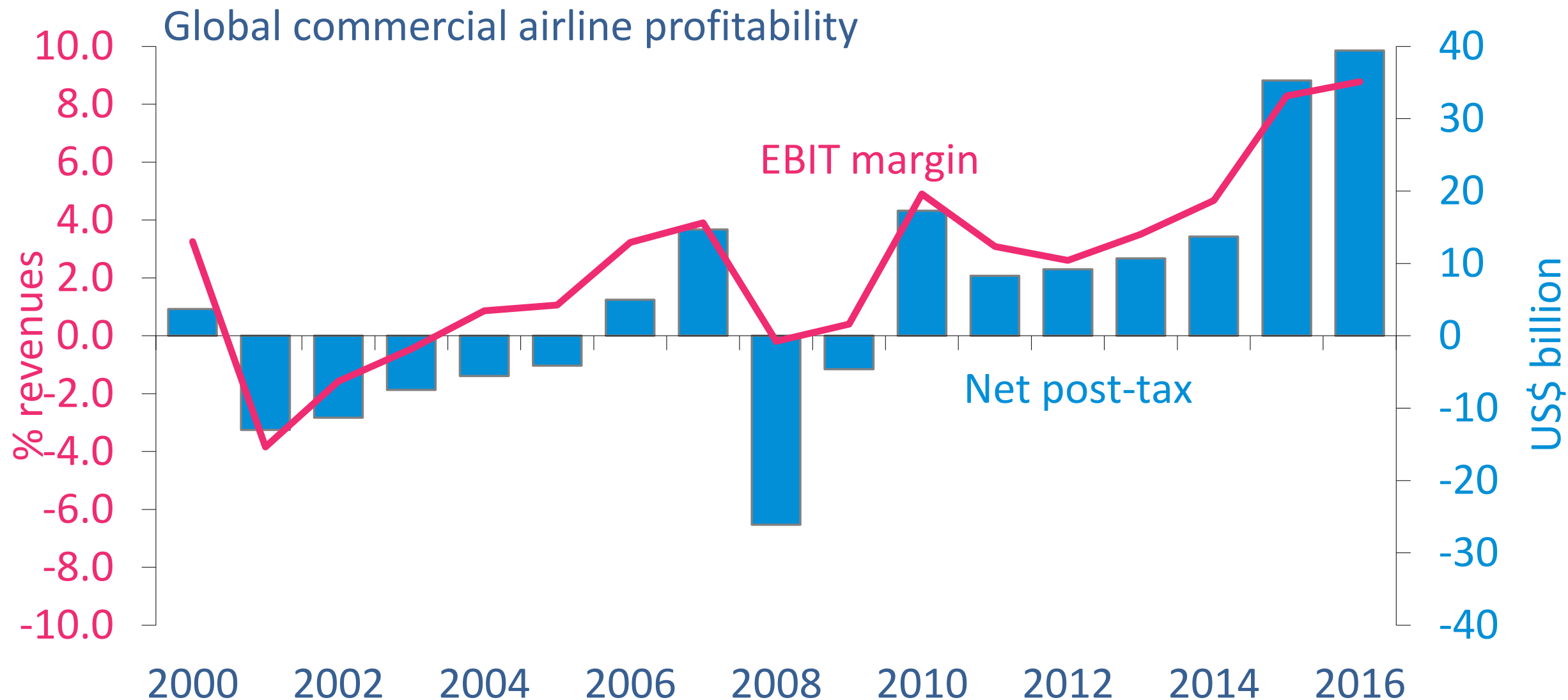
of global GDP supported by aviation

A large, stylized world map in the background, rendered in a low-poly, geometric style with various shades of red and pink. The map is centered on the Atlantic Ocean, with North and South America on the left and Europe and Africa on the right.

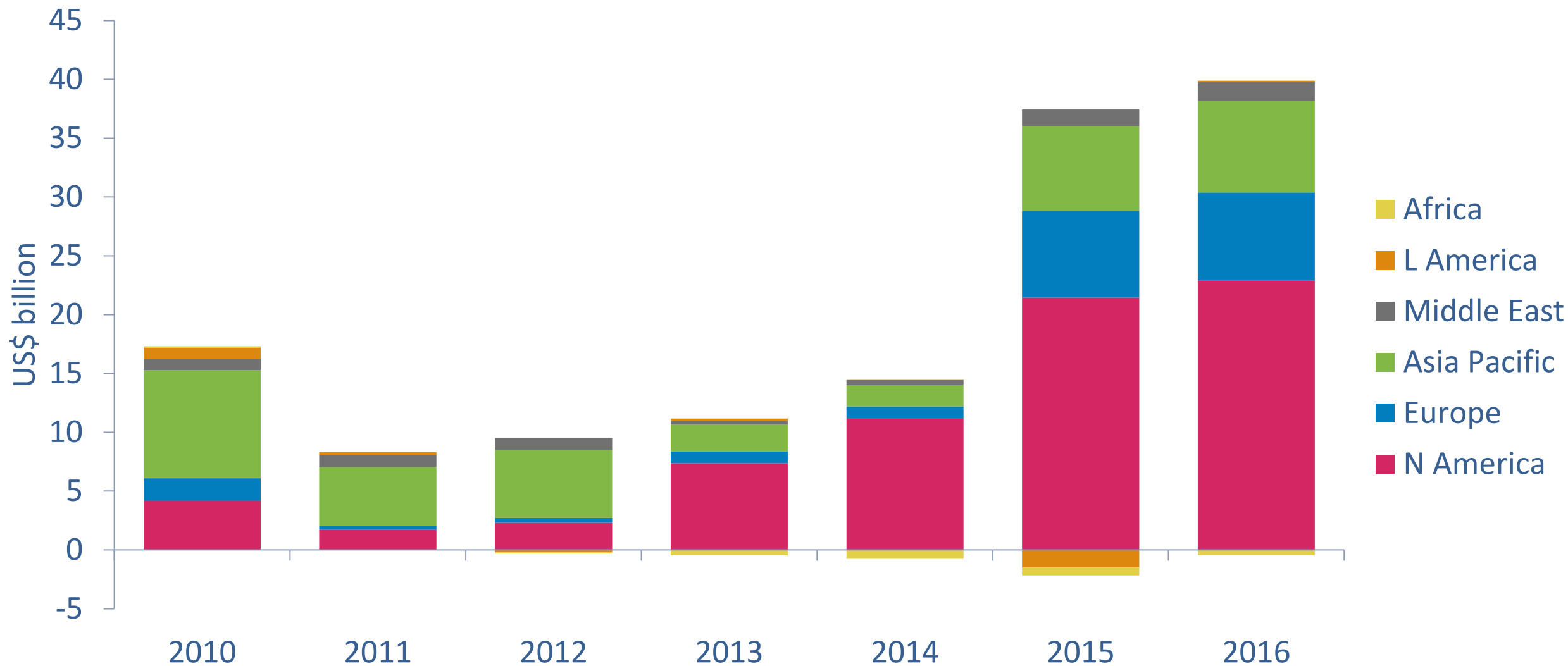
...7.6 million jobs & \$791 billion of GDP

A large, stylized world map in the background, composed of many blue triangles of varying shades, creating a low-poly effect. The map is centered on the Atlantic Ocean.

...5.2 million jobs & \$167 billion of GDP

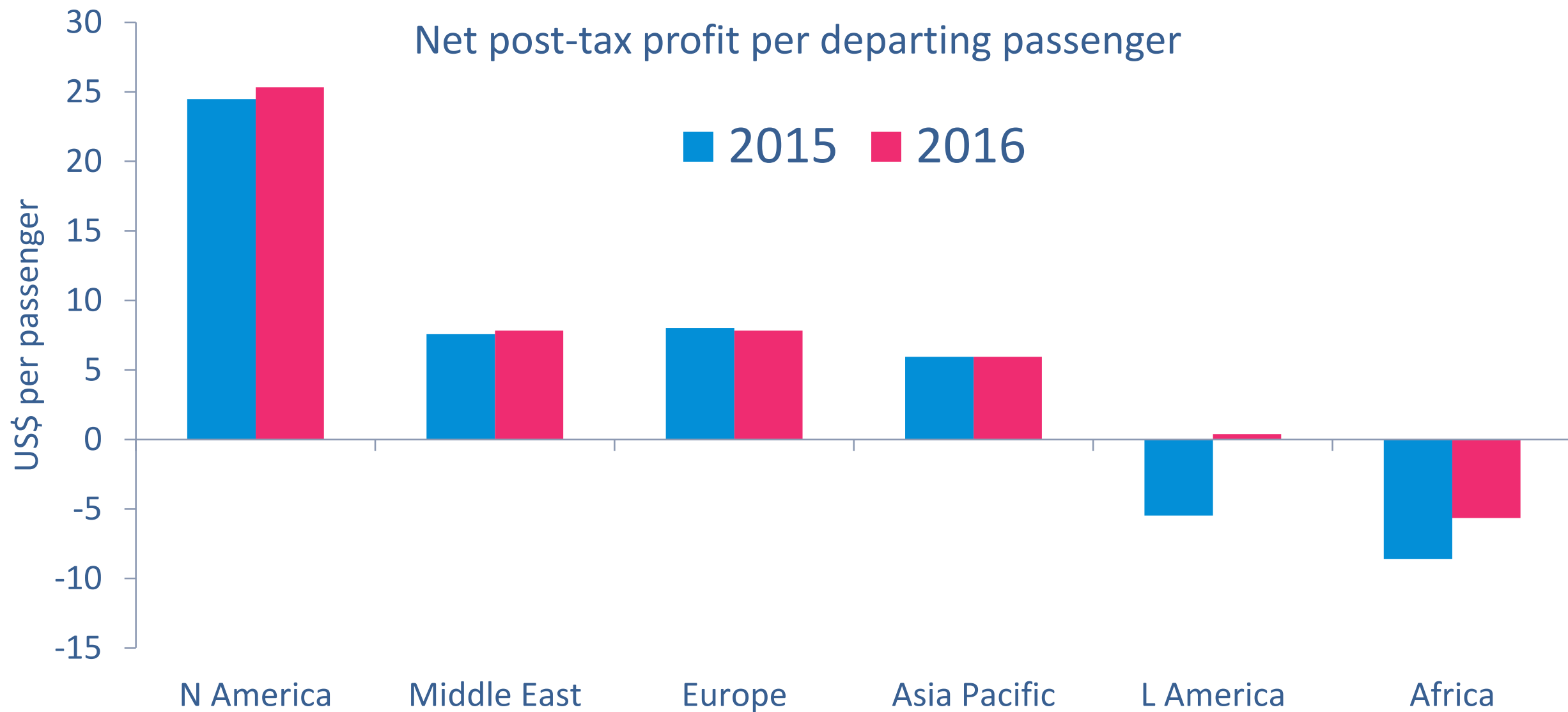


Net post-tax profit by region





PER PASSENGER PROFIT SHOWS WIDE REGIONAL VARIATION...





INDUSTRY CONSOLIDATION







1990s COMPETITIVE ENVIRONMENT



2016 COMPETITIVE LANDSCAPE





WHAT'S AHEAD?



Passengers

1990: 1.2 billion



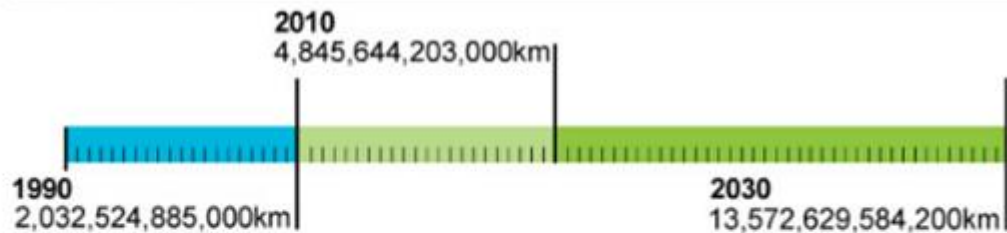
2010: 2.7 billion



2030: 5.9 billion



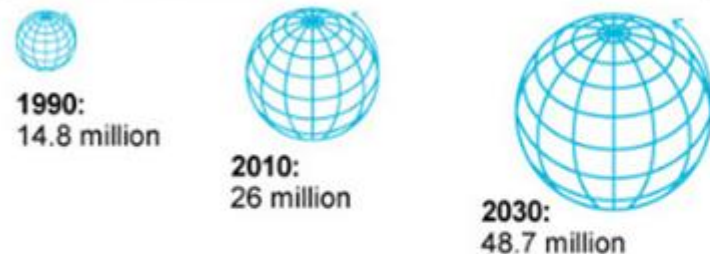
Passenger kilometres flown



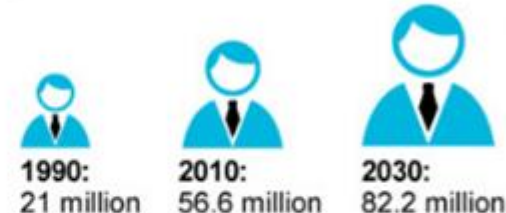
Aircraft in service



Aircraft movements



Jobs supported



Source:
ABBB
Air Transport
Action Group

Note:
Figures are
for 2010

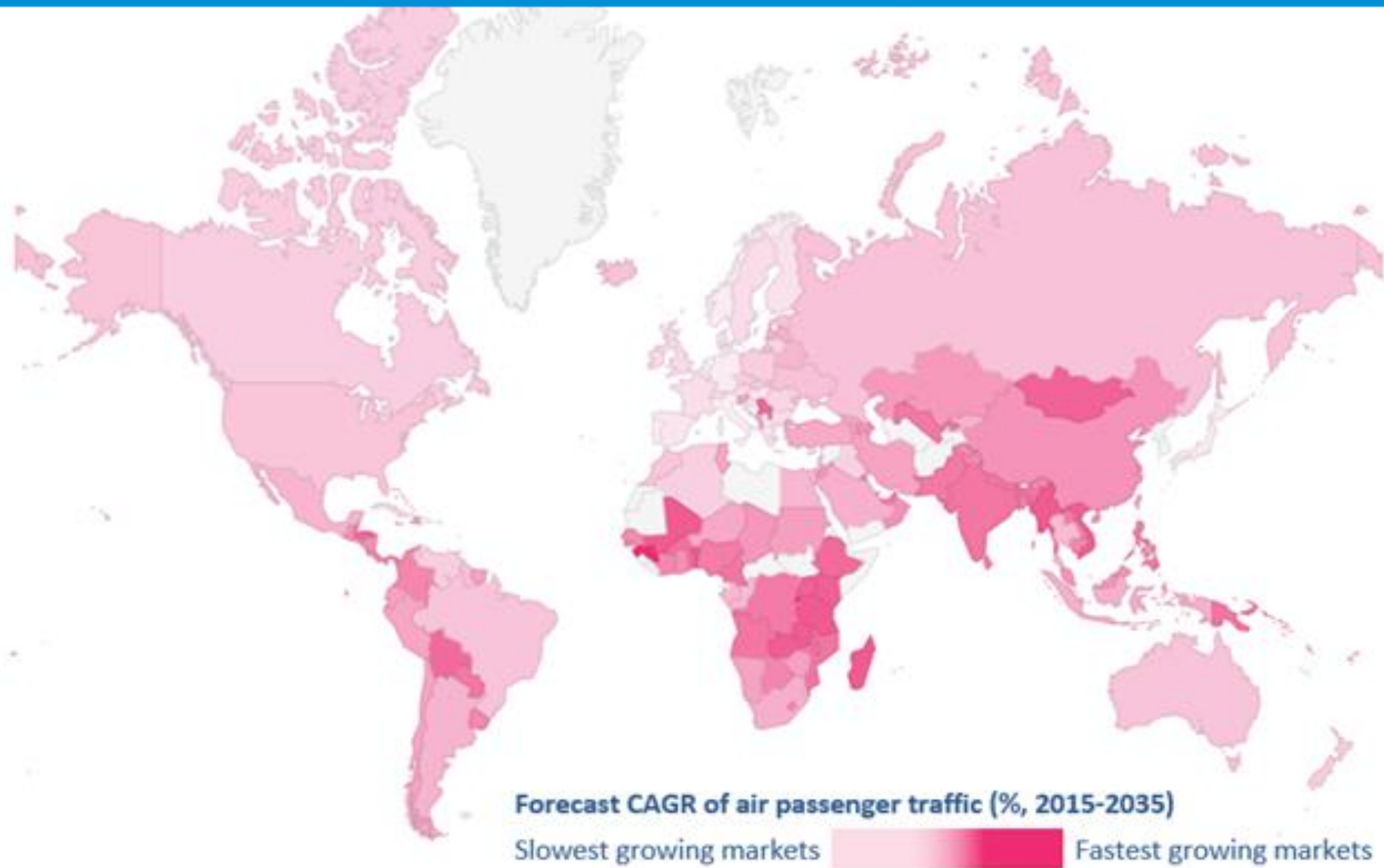
56.6 million
Supported by
aviation worldwide

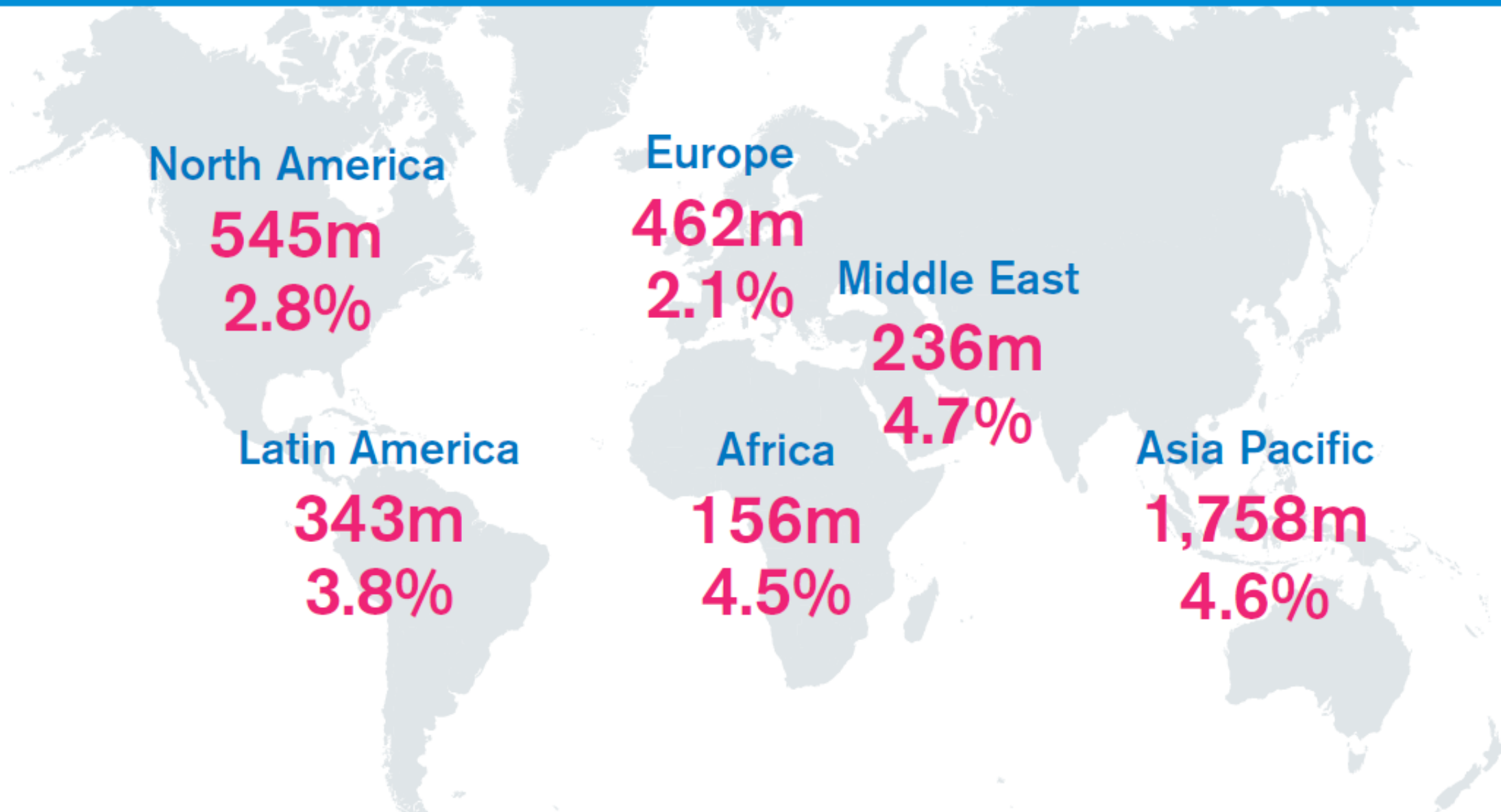
\$2.2 trillion
Aviation's global
economic impact

19th
If aviation
were a country,
it would rank 19th
in size by GDP

3,848 Airports with
scheduled services
1,568 Commercial
airlines

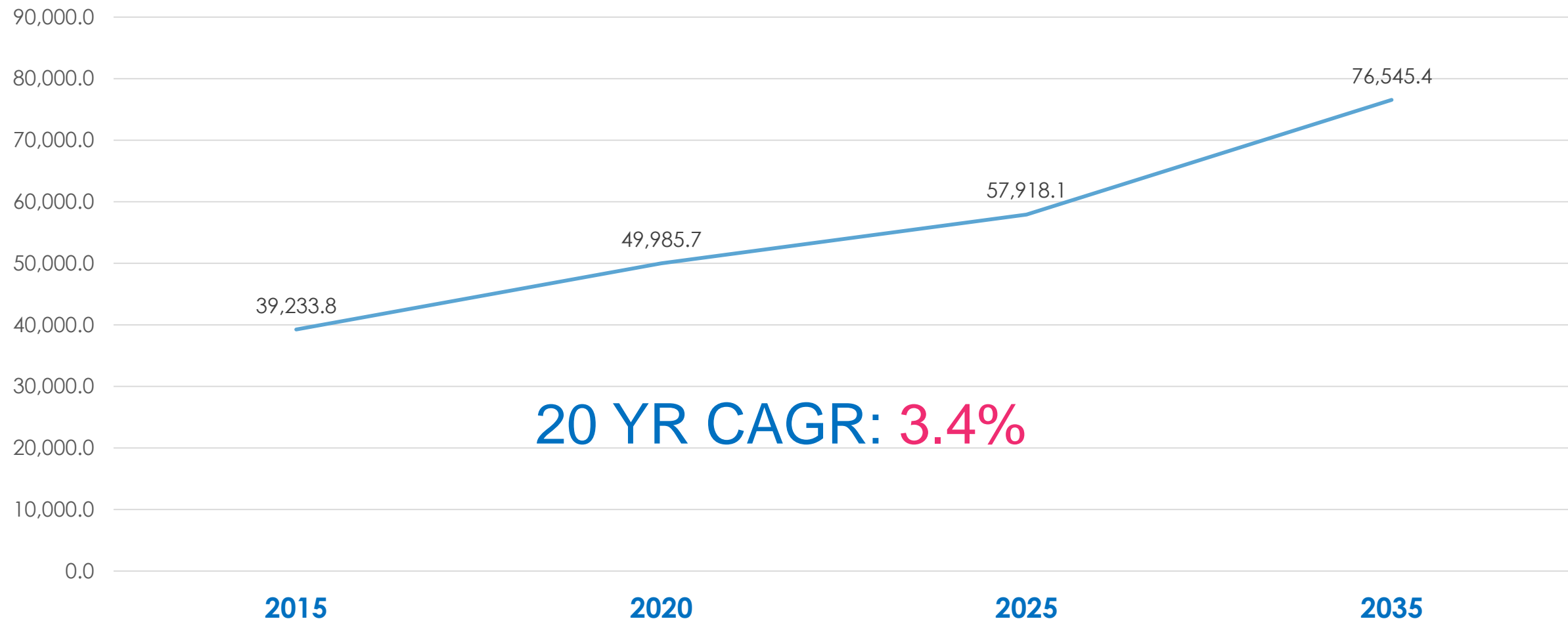
192 Air navigation
service providers
23,844 Commercial
aircraft in service





'000 pax

CARIBBEAN



'000 pax

2015 2020 2025 2035

30,000.0

25,000.0

20,000.0

15,000.0

10,000.0

5,000.0

0.0

20 YR CAGR

3.9%

3.0%

1.9%

4.4%

3.6%

3.1%

Bahamas

Barbados

Cuba

Dominican
Republic

Jamaica

Trinidad And
Tobago

3,540.2

4,818.0

5,695.2

7,635.1

1,411.6

1,835.2

2,052.9

2,573.6

6,264.6

6,226.7

7,036.6

9,109.6

11,219.3

16,066.4

19,344.9

26,590.1

4,879.7

6,416.9

7,476.4

9,841.0

2,719.6

3,834.5

4,215.8

4,973.1



United States

Key West

Miami

The Bahamas

Havana

Cuba

Camagüey

Holguín

Santiago de Cuba

Turks & Caicos

Dominican Republic

Haiti

Virgin

North Atlantic Ocean



CARIBBEAN OPERATIONAL CLIMATE



Kingston

Antilles

Sea

icaragua

Providencia

San Andrés

agua

San José

Panama

Barranquilla

Cartagena

Maracaibo

Caracas

Barcelona

Aruba

Curaçao

Bonaire

Lesser Antilles

Leeward Antilles

Margarita

Windward Islands

St. Kitts
Nevis

Antigua
Montserrat

Guadeloupe

Dominica

Martinique

St. Lucia

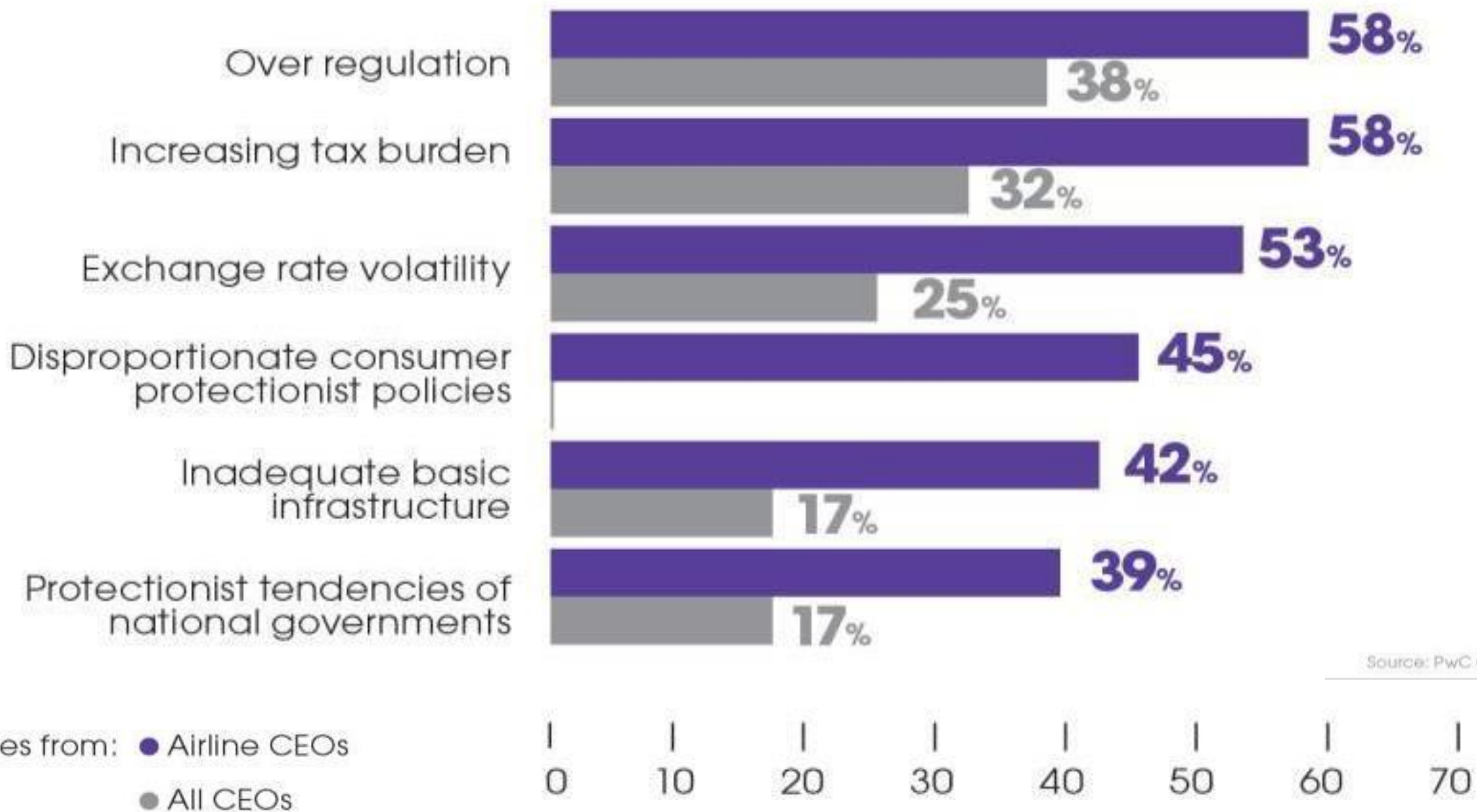
Barbados

St. Vincent

Grenada

Tobago

Trinidad



- Volatile markets
- Currency restrictions
- Relevant Infrastructure Projects
- Intra-Caribbean Connectivity
- Taxation and fees are a growing problem*
- Regulatory Environment*





YOUR EMISSIONS CHARGES
Payable to governments
(not to be used for reducing emissions)

Receipt Nbr: 0566488
Issued: 27/02/2013

17:47
Geneva

INTERNATIONAL & DOMESTIC	
Europe (ETS, 30 countries)	\$800m
United Kingdom (APD)	\$4,700m
Germany (air passenger tax)	\$1,300m
Ireland (air travel tax)	\$175m
Austria (carbon tax)	\$120m
DOMESTIC	
New Zealand (ETS)	\$1.3m
Australia (carbon tax)	\$137m
	\$49m
	\$1,300m
	\$1,100m
	\$120m



CHARGES & TAXATION



Australia (fuel tax)
Canada (fuel tax)
Brazil (fuel tax)
USA (fuel tax)

OF WHICH ENVIRONMENTAL CHARGES \$7,000m

VISA
XXXX XXXX XXXX XXXX 8541
#22/344/5
TVA

**** NO FREQUENT FLYER MILE
COLLECTION POSSIBLE ON TAXES ****

Thank you for contributing to our national
treasuries. Have a nice day.



- EACH \$1 OF TICKET TAX COULD LEAD TO:
 - OVER 40,000 FEWER FOREIGN PASSENGERS
 - \$20M OF REDUCED TOURIST EXPENDITURE
 - 1,200 FEWER JOBS



➤ Increase in departure tax by 150% from US\$14 to US\$35.

➤ Aviation is burdened with excessive taxes to fund both State functions and generate public revenues.

➤ Taxes and charges on international air transport should only be levied in compliance with ICAO's taxation policies.





- Tax removal in the Caribbean may generate a total discounted benefit of USD \$8 billion up to 2035.
- Tax removal can potentially deliver a GDP benefit of USD \$3.2 billion.
- Employment growth of 51,000 jobs.
- Removal of aviation taxes in the Caribbean is estimated to result in a total consumer benefit of \$ 426 million.

Link to study:

<https://www.iata.org/pressroom/media-kit/Documents/latin-america-tax-study.pdf>



REGULATORY ENVIRONMENT



- Entered in to force in 2003
- It governs airline liability for passengers, baggage and cargo on international flights in cases of:
 - death, injury or delay to passengers
 - delay, loss or damage to baggage
 - delay, loss or damage to cargo
- IATA and its member airlines continue to support ICAO in promoting MC99 as the single, global Convention on airline liability



- Passenger A is on the outbound sector of a round trip ticket booked NAS-YYZ-NAS. In the case of a claim, the Warsaw Convention would apply because the origin and destination are the same, NAS, and the Bahamas has not ratified MC99
- Passenger B is returning to YYZ as part of a round trip ticket booked YYZ-NAS-YYZ. In the case of a claim the Montreal Convention 1999 would apply because the origin and destination are the same, YYZ and Canada is a party to MC99
- Passenger C is on a one way ticket NAS-YYZ. In the case of a claim the applicable treaty that both the Bahamas and Canada are both parties to which is the Warsaw Convention and amended by the Hague Protocol 1955

	Warsaw Convention (1929)	Hague Protocol (1955)	Additional Protocol 2 + Montreal Protocol 4	Montreal Convention 1999*
Death or injury	USD 12,000	USD 24,000	USD 25,000	USD 160,000 (first <i>threshold</i> , higher sums recoverable)
Baggage	USD 20 per kg	USD 20 per kg	USD 25 per kg	USD 1,700 (new global limit, approx. USD 74 per kg on 23kg bag)
Cargo	USD 20 per kg	USD 20 per kg	USD 25 per kg	USD 28 per kg
Provisions for electronic documentation?	No	No	Yes (with MP4 only)	Yes

NB. *Treaties don't express limits in USD. These have been calculated using [xe.com](https://www.xe.com) for comparison purposes

- Universal ratification of MC99 ensures that citizens are covered by a fair and modern liability regime wherever they are flying in the world.
- MC99 supports trade facilitation by enabling the use of electronic documents in the air cargo supply chain:
 - This means faster, more secure shipments for exporters and businesses
 - Important for many high-value or time sensitive products that rely on air cargo connectivity.

- Antigua & Barbuda
- Bahamas
- Grenada
- Haiti
- St. Kitts & Nevis
- St. Lucia
- Suriname
- Trinidad and Tobago



MONTREAL PROTOCOL 14 - UNRULY PASSENGERS



Unruly Passengers

have become a **significant issue**

2007–2015

49,084

reported cases of
unruly incidents

**1 incident every
1,613 flights**

2015

10,854

reported cases of
unruly incidents

**1 incident every
1,205 flights**

11%

of reports indicated
physical aggression

**It is one
of the top 3**
safety issues that
concern cabin crew



53% of IATA members surveyed considered that unruly passengers have increased in frequency in past 5 years

40% of airlines had diverted a flight in past 12 months due to an unruly passenger.

Unruly passenger delays flight, booted off

Published on May 4, 2016, 10:15 am AST
By Carolyn Kissoon

LIAT Passenger Fined for Bomb Threat

CARIBBEAN360 | AUGUST 10, 2016

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Unruly passenger on Air Canada flight to Barbados causes scare

CARIBBEAN360 | JUNE 15, 2016

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Tuesday, October 11, 2016



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LATEST NEWS: [Darren Bravo ready for pink ball challenge](#) 12:57 PM



News

Unruly passengers force Caribbean-bound flight to divert to Bermuda

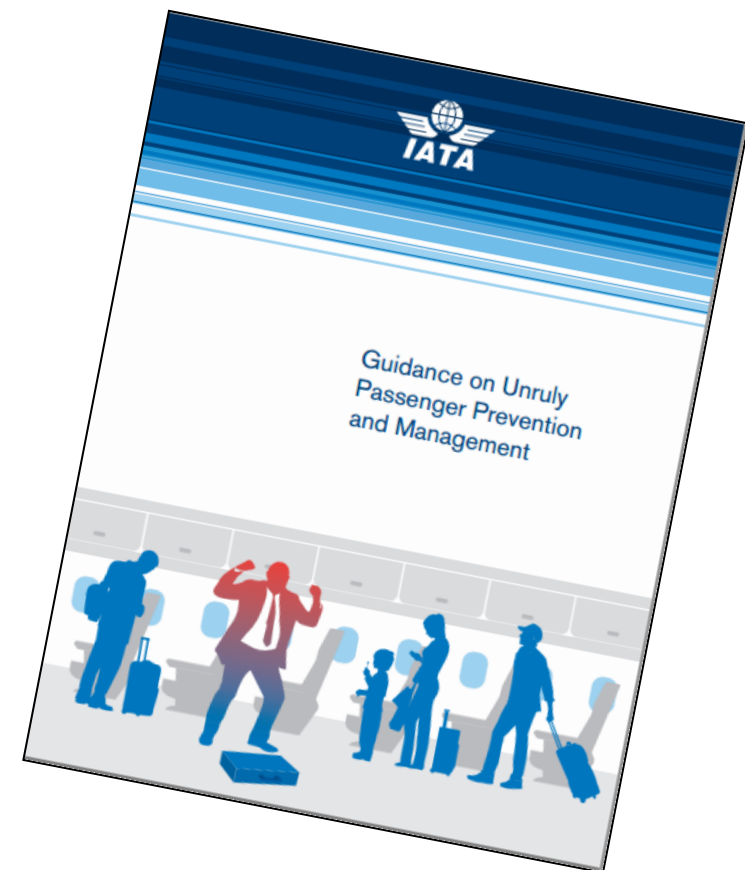
Saturday, February 02, 2013 | 6:22 PM

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HAMILTON, Bermuda (CMC) - Three unruly passengers were arrested and will appear in a Bermudan court "in the near future" after forcing a Caribbean-bound jetliner to divert to the island on Friday night.

OTHER STORIES

- American with bipolar disorder turns mental illness advocate
[10 Comments](#)
- Ganja law scolding
[12 Comments](#)
- 'Rot in jail'
[7 Comments](#)
- 12-year-old beekeeper
[6 Comments](#)
- Cops name person of interest in March Pen murders
[6 Comments](#)
- Work on sewerage system to continue while



- Threaten the safety and security of aircraft, passengers and crew
- Harm to other passengers and crew
- Inconvenience to other passengers
- Operational disruption
- Cost of unscheduled landings to disembark or deliver unruly passengers is usually borne by airlines - can be between USD10,000 – USD200,000

A new Protocol amending the Tokyo Convention was adopted on 4th April 2014

Benefits:

- **Extends jurisdiction**
- **Better definition of offenses**
- **Airline right of recourse**



- GOVERNMENTS
- INDUSTRY PARTNERS
- WTO
- CIVIL AVIATION AUTHORITIES
- REGULATORS





CONNECT. COLLABORATE. COMMUNICATE.





Our mission is to represent, lead and serve the airline industry. 