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Ottawa - October 29th, 2024

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Women in Aviation Breakfast



Kendra Kincade

Elevate Aviation



Judy Cameron

Director
Northern Lights Aero
Foundation

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Event Overview



Julie Mailhot

Master of Ceremonies
IATA

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Competition Law Guidelines



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Land Acknowledgement



Elder Verna McGregor

Algonquin Nation

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Government of Canada's Air Transport Vision



The Honourable Anita Anand

Minister of Transport
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Arun Thangaraj

Deputy Minister of Transport
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Welcoming Remarks



Jeff Morrison

President & CEO
National Airlines Council of Canada

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IATA's Global Perspective: Opportunities and Challenges in Canada's Aviation Sector



Doug Lavin

Vice President, Member and External
Relation, North America, IATA

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Welcome

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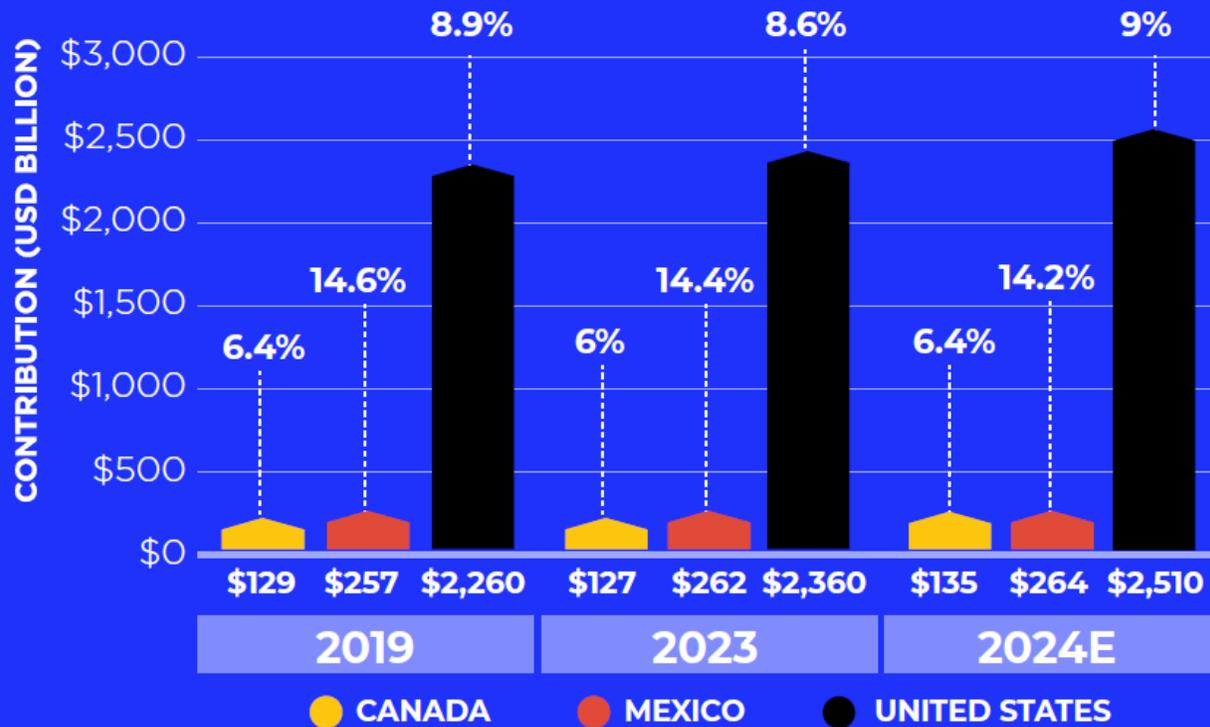


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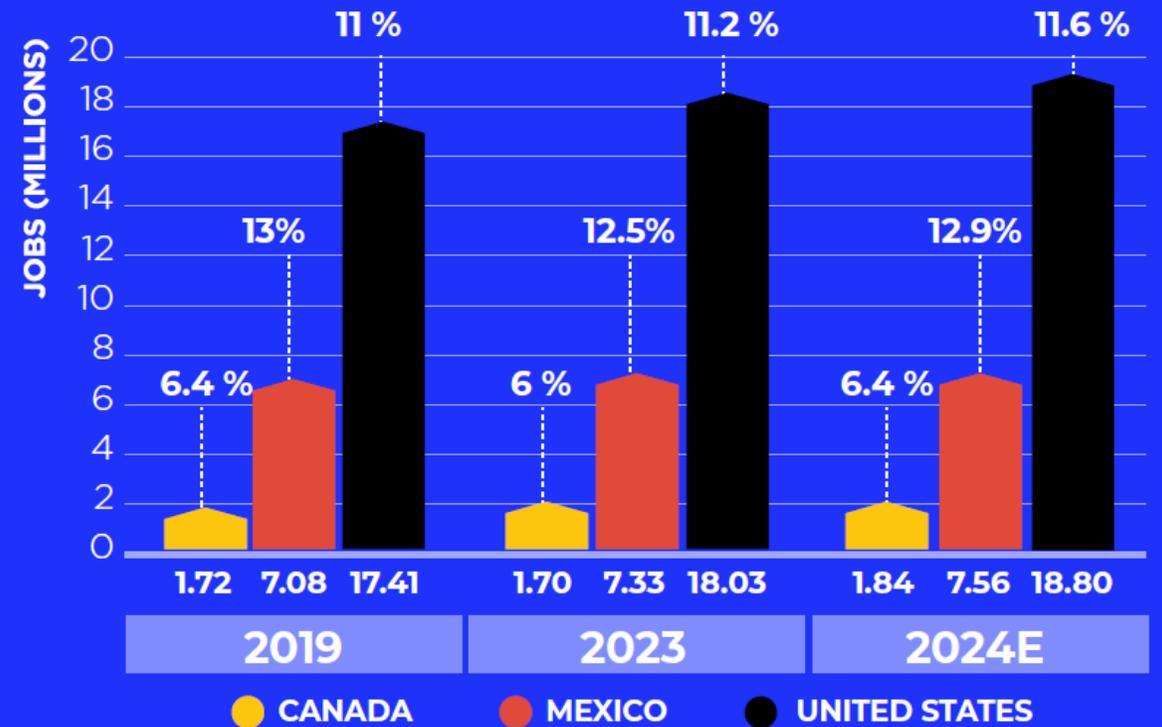
Benefits of Air Transport and Tourism in Canada



TOURISM CONTRIBUTIONS TO GDP



TOURISM CONTRIBUTIONS TO EMPLOYMENT



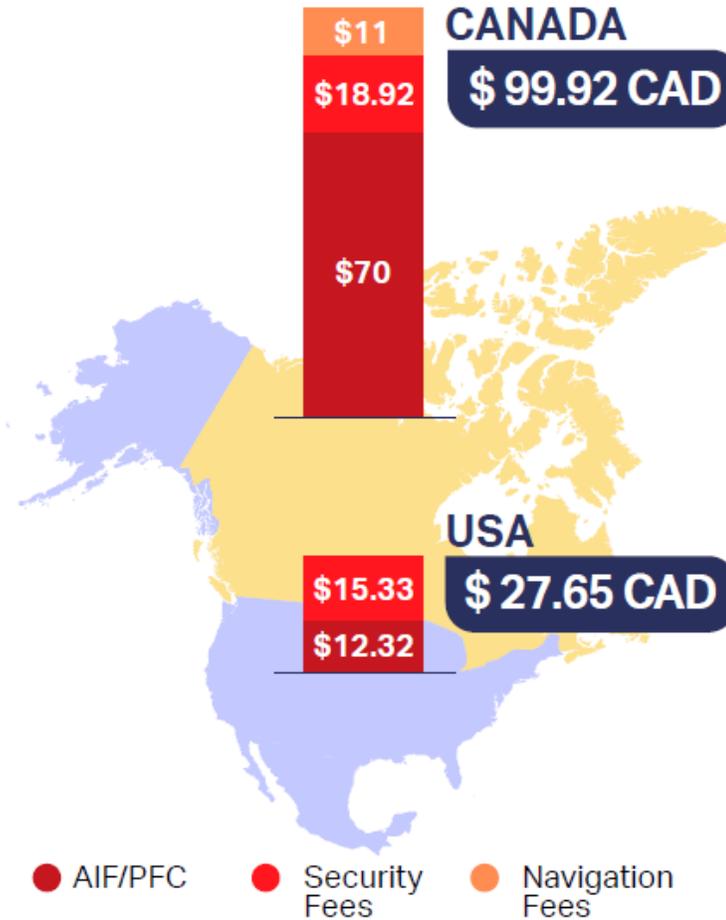
Source: IATA Economics using information from WTTC. Jobs in millions and GDP contribution in USD.

Taxes and Fees in Canada vs. US



Airport Improvement Fee
\$ 70.00 CAD
ATSC Fees
\$ 18.92 CAD
Navigation Fees
\$ 11.00 CAD
APPR
UP TO \$ 1,000.00 CAD

Passenger Facility Charge
\$ 12.32 CAD ≈ \$ 9 USD
September 11 Security Fee
\$ 15.33 CAD ≈ \$ 11.2 USD
Navigation Fees
✗ Not Applicable
APPR
✗ Not Applicable



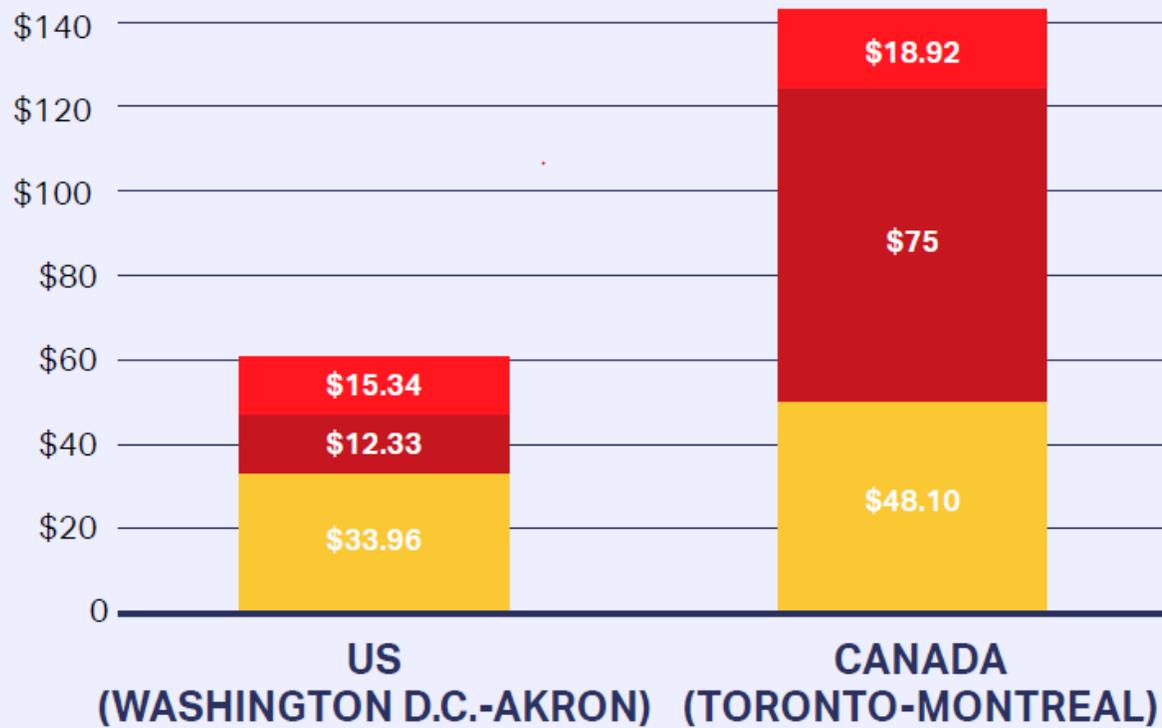
Source: IATA using information provided by a member airline.
 Note: Canadian example based on YYZ-YUL round trip. Fees are per passenger. US example based on a domestic roundtrip.

Canada's Air Transport Competitiveness



According to the 2024 Travel & Tourism Competitiveness Index by the World Economic Forum, **Canada ranks 11th among 116 countries.** However, Canada's price competitiveness is low, **ranking 101st.**

Roundtrip Example For a Comparably Distanced Domestic Route in Canada and the US In CAD



- Taxes
- AIF/PFC
- Security Fees



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We urge the Canadian government to review its approach toward aviation and implement policies that support growth and affordability while promoting this incredible economic engine.



CANADA - ROUTES



	Sep2019	Sep2023	Sep2024	Var. 2024 Vs 2019	Var. 2024 Vs 2023
Domestic	1,004	866	843	-16.0%	-2.7%
International	353	356	389	10.2%	9.3%
Total	1,357	1,222	1,232	-9.2%	0.8%

CANADA - FREQUENCIES



	Sep2019	Sep2023	Sep2024	Var. 2024 Vs 2019	Var. 2024 Vs 2023
Domestic	71,972	54,434	55,391	-23.0%	1.8%
International	22,917	19,915	21,462	-6.3%	7.8%
Total	94,889	74,349	76,853	-19.0%	3.4%

CANADA - SEATS



	Sep2019	Sep2023	Sep2024	Var. 2024 Vs 2019	Var. 2024 Vs 2023
Domestic	5,727,989	5,106,136	5,205,344	-9.1%	1.94%
International	3,380,594	3,193,135	3,502,094	3.6%	9.7%
Total	9,108,583	8,299,271	8,707,438	-4.4%	4.9%

Source: IATA using data from OAG

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Canada's **international routes** and seats surpassed 2019 levels in September.



Domestic connectivity has not fully recovered since the pandemic.

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Tuesday - October 29 th , 2024	
07:00 - 09:00	Registration Check-In & Welcome Coffee
07:30 - 08:45	Women in Aviation Breakfast - By Invitation only Sponsored by: TURKISH AIRLINES Kendra Kincade - President & CEO, Elevate Aviation Judy Cameron - Director- Northern Lights Aero Foundation
09:00 - 09:15	Event Kick-Off, Indigenous Land Acknowledgement & Competition Law Statement Omayra Issa - News Anchor, CPAC
09:15 - 09:30	Government of Canada's Air Transport Vision Arun Thangaraj - Deputy Minister of Transport Canada
09:30 - 09:45	Welcoming Remarks Jeff Morrison - President and CEO, National Airlines Council of Canada
09:45 - 10:00	IATA's Global Perspective: Opportunities and Challenges in Canada's Aviation Sector Doug Lavin - Vice President, Member & External Relations, North America, IATA
10:00 - 11:00	Airline CEO Roundtable Michael Rousseau - President & CEO, Air Canada Annick Guérard - CEO, Air Transat Shelly De Caria - President & CEO, Canadian North Alexis von Hoensbroech - CEO, WestJet Moderator: Lisa Raitt - Vice-Chair Global Investment Banking, CIBC
11:00 - 11:30	Coffee Break - Sponsored by: NAV CANADA
11:30 - 11:50	Regulatory Insights: Passenger Rights & More: Lessons Learnt from EU 261 and How to Address Consumer Protection in Canada's Aviation Sector James Wittshire - Assistant Director External Affairs, IATA
11:50 - 12:35	Global Insights: An International Competitive Comparison & Outlook on Canada Ronce Almond - Managing Director, International Government Affairs, American Airlines Laura Dawson - Executive Director, Future Borders Coalition Robert Kokonis - President & Managing Director, AirTrav Inc. Moderator: Doug Lavin - Vice President Member & External Relations North America, IATA
12:35 - 14:00	Networking Lunch - Sponsored by: AIR CANADA

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Tuesday - October 29 th , 2024	
14:00 - 14:45	Sustainability Insights: Canada's Flight Path Towards Net Zero by 2050 Catherine Guillemart - Head of Public Affairs Canada, Airbus Representative to ICAO Myrka Manzo - Director, Environmental Compliance, Air Canada Geoffrey Tauvette - Executive Director, Canadian Council for Sustainable Aviation Fuels Moderator: Shashank Nigam - Founder & CEO, SimpliFlying
14:45 - 15:30	The Passenger Journey: How Can the Canadian Air Travel Ecosystem Work Better Together to Improve Passenger Air Travel? Nada Semaan - President & CEO, Canadian Air Transport Security Authority (CATSA) Erin O'Gorman - President, Canada Border Services Agency (CBSA) Mark Cooper - Vice President, Chief Technology and Information Officer, NAV CANADA Kevin Jackson - President, Porter Airlines Monette Pasher - President, Canadian Airports Council Moderator: David Duval - Professor, University of Winnipeg
15:30 - 16:00	Coffee Break - Sponsored by: TURKISH AIRLINES
16:00 - 16:30	Accessibility Insights: Ensuring that every individual, regardless of ability, can access air travel in Canada Stephanie Cadieux - Chief Accessibility Officer, Government of Canada Jeff Morrison - President and CEO, National Airlines Council of Canada Moderator: Graham Keithley - Vice President and Deputy Counsel, Regulatory Legal Affairs, Airlines for America (A4A)
16:30 - 17:15	Value of Aviation in Canada: The Outside Perspective Amy Butcher - Vice-President, Stakeholder Relations and Engagement Tourism Industry Association of Canada Nelson Camacho - CEO North America, Swissport Stephane Albert - ICAO Main Executive Representative, Pratt & Whitney Can Dizdar - Ambassador, Turkish Embassy in Canada Nadia MacDonald - Executive Director, Atlantic Canada Airport Association Moderator: David De Grandpré - Partner, Deloitte
17:15 - 17:30	Closing Remarks Jeff Morrison - President and CEO, National Airlines Council of Canada
17:30 - 19:00	Networking Reception - Sponsored by: WESTJET For speaker profiles , please click here . To learn more about our sponsors , please click here .

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Airline CEO Roundtable

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Lisa Raitt

Vice-Chair Global
Investment Banking
CIBC Capital Markets



Michael Rousseau

President & CEO
Air Canada



Annick Guerard

CEO
Air Transat



Shelly De Caria

President & CEO
Canadian North



Alexis von Hoensbroech

CEO
WestJet

Coffee Break

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Regulatory Insights, Passenger Rights & More: Lessons Learnt from EU 261 and How to Address Consumer Protection In Canada's Aviation Sector



James Wiltshire

Assistant Director,
External Affairs, IATA

General observations on Consumer Protection

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- Balance protection of consumer rights and promotion of choice and value
- Focus should be on improving performance of the network
- Aviation is a complex system involving multiple stakeholders
 - important to align accountability with control
- Roles for governments, industry and consumers – rights and responsibilities
- Key role for information and communication

Regulation can take on a life of its own

Application of EU261 very different to Regulation text

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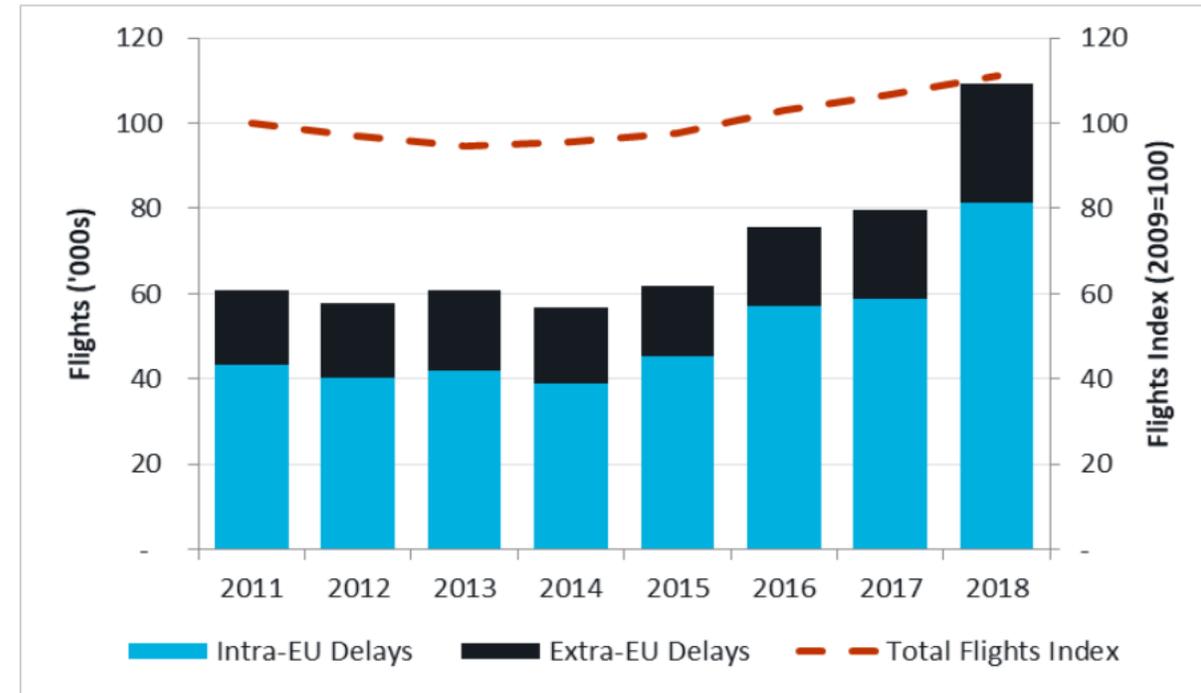
- EU Regulation 261 / 2004 intended to influence commercial decisions made by carriers
- Legal interpretations mean that most claims under EU261 relate to operational disruption
- 2009 *Sturgeon* case - CJEU judged that a long delay is *de facto* equivalent to a cancellation
- Delay compensation being payable for long-delays is not actually included in the Regulation



Compensation doesn't improve operational performance

EU261 never intended to address disruption

- Operational performance in Europe declined even as the cost of claims under R261 increased.
- Airlines fully incentivized to operate to schedule: estimated delay cost = \$101 / block minute
- Primarily driven by increased air traffic management delays which caused knock-on disruption
- Lack of shared accountability breaks link between performance and liability



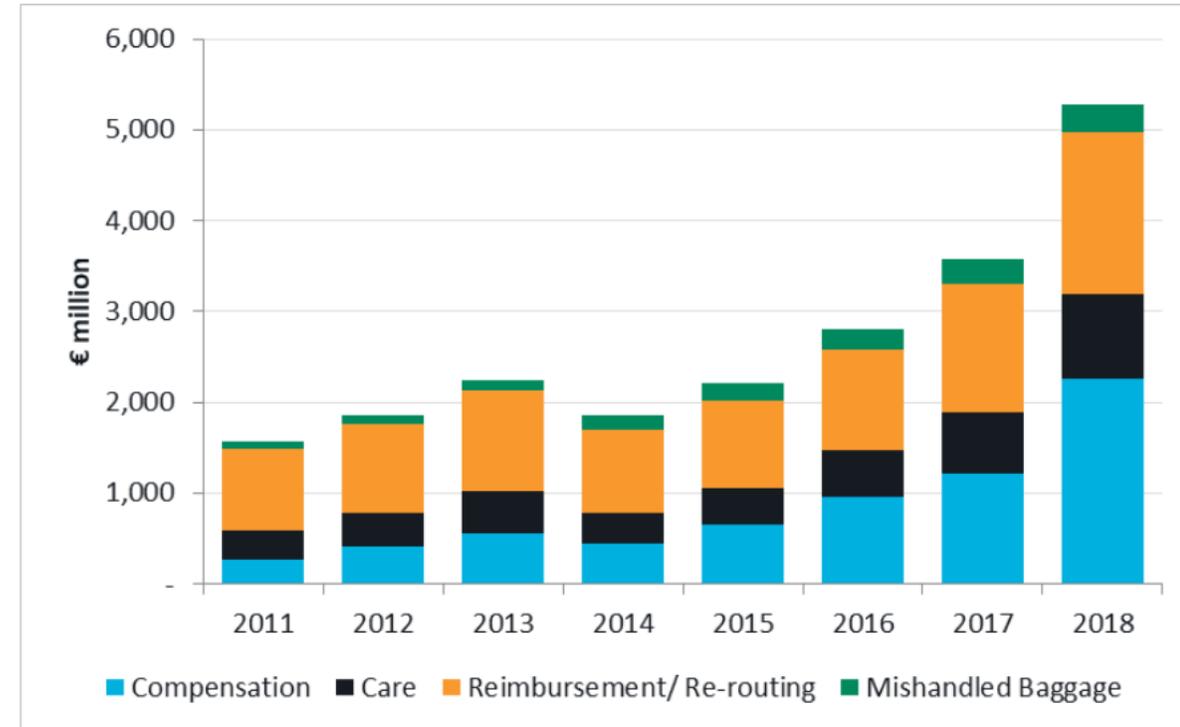
Source: Steer analysis of CODA data

Compensation regimes drive up the cost of travel

Ballooning cost of punitive compensation impacts competitiveness

2020 European Commission study assessed cost to airlines of complying with EU 261:

- Cost to airlines of complying with claims under R261 reached ~CAD \$8 Billion in 2018, up approximately CAD \$2.50 Billion in 2011
- Equivalent per passenger cost ~CAD \$4.5
- Cost per passenger affected by disruption more than 90% of airlines' average fare
- Legal and administrative equivalent to 0.6% of airlines' overall cost base



Source: Steer analysis of CODA and airline data

Lack of clarity creates issues for all parties

Uneven approach to enforcement adds to challenges

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Many aspects of EU261 poorly defined e.g. concept of “extraordinary circumstances”:

- Consumers do not always know whether they are eligible for compensation
- For airlines, each case of disruption is unique. Many require detailed investigation. Highly manual process driving the increase in legal and administrative costs
- Claims Management Companies (CMCs) have emerged to take advantage of complexity and high value of compensation. Commission worth up to 50% of the value of the compensation.
- Court of Justice of the EU (CJEU) has filled the vacuum 75+ judgements related to EU261

High volume of complaints is a symptom, not a cause

EU261 is not the "Gold Standard"

Shortcomings of R261 widely acknowledged

- Better information to passengers: informed consumers are empowered consumers
- "Better late than never": passengers want to reach their destination
 - Revised delay thresholds: 5, 9 and 12 hours
 - Reactionary delays
- Clear rules on extraordinary circumstances:
 - Binding but non-exhaustive list;
 - Separation of safety-related incidents
- Care and assistance:
 - Shared responsibility
 - Time limitation in events of mass disruption
- Addressing lack of a right of redress for carriers

Implications for Canada and the APPRs

- EU261 is not the “Gold Standard”
- Focus should be on improved performance not punitive compensation
- Aviation is a system – shared accountability is key to align incentives
- Compensation regimes drive up the cost of travel – not in consumer interest
- Enhanced clarity needed on extraordinary circumstances – especially safety
- Complaint Fee proposals address symptoms not causes

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Global Insights: An International Competitive Comparison & Outlook on Canada

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Vice President, Member
and External Relations
North America, IATA



Robert Kokonis

President &
Managing Director,
AirTrav Inc.



Ronce Almond

Managing Director
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Government Affairs,
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Laura Dawson

Executive
Director, Future
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Remarks

Lunch Sponsor



David Rheault

Vice President, Government and
Community Relations, Air Canada



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Sustainability Insights: Canada's Flight Path Towards Net Zero by 2050

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Shashank Nigam

Founder & CEO
SimpliFlying



Catherine Guillemart

Head of Public Affairs
Canada, Airbus
Representative to ICAO



Myrka Manzo

Director, Environmental
Compliance, Air Canada



Geoffrey Tauvette

Executive Director,
Canadian Council for
Sustainable Aviation
Fuels



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Shashank Nigam

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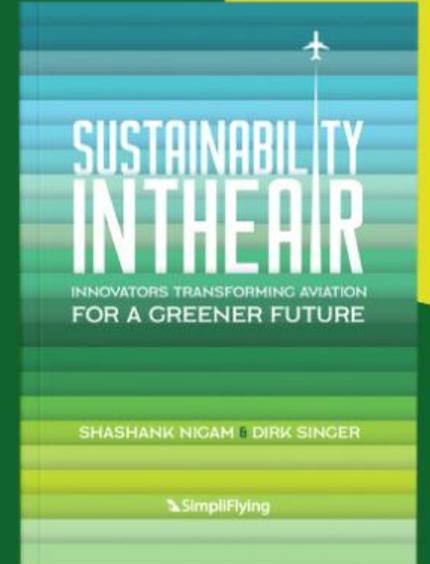
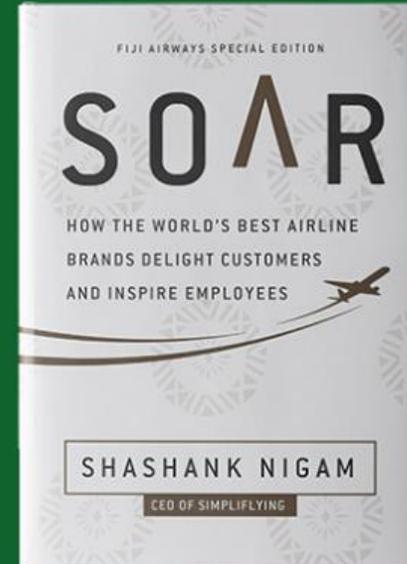
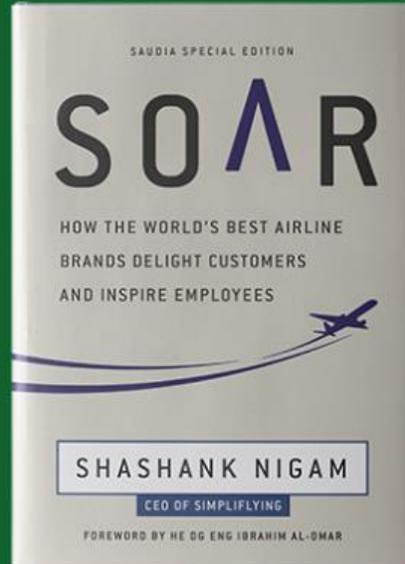
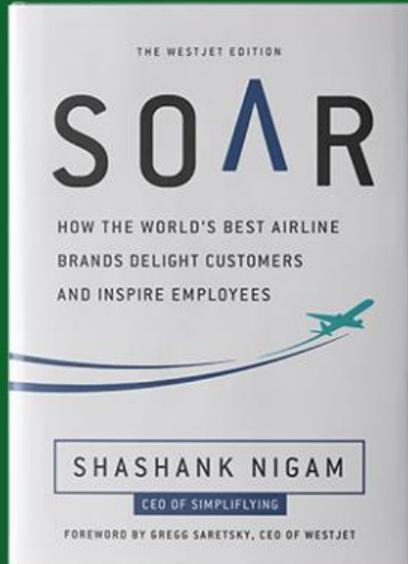
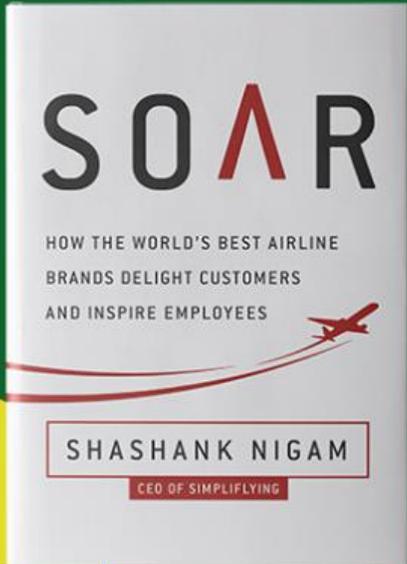


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2.9 million passengers flew on Sunday, November 26, 2023 in the US

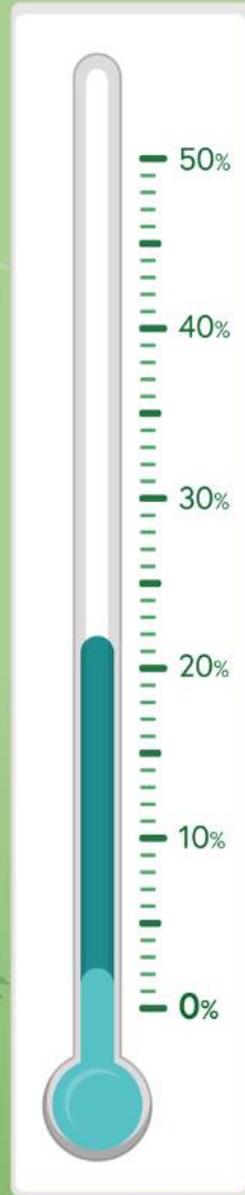


Source: TSA screening data

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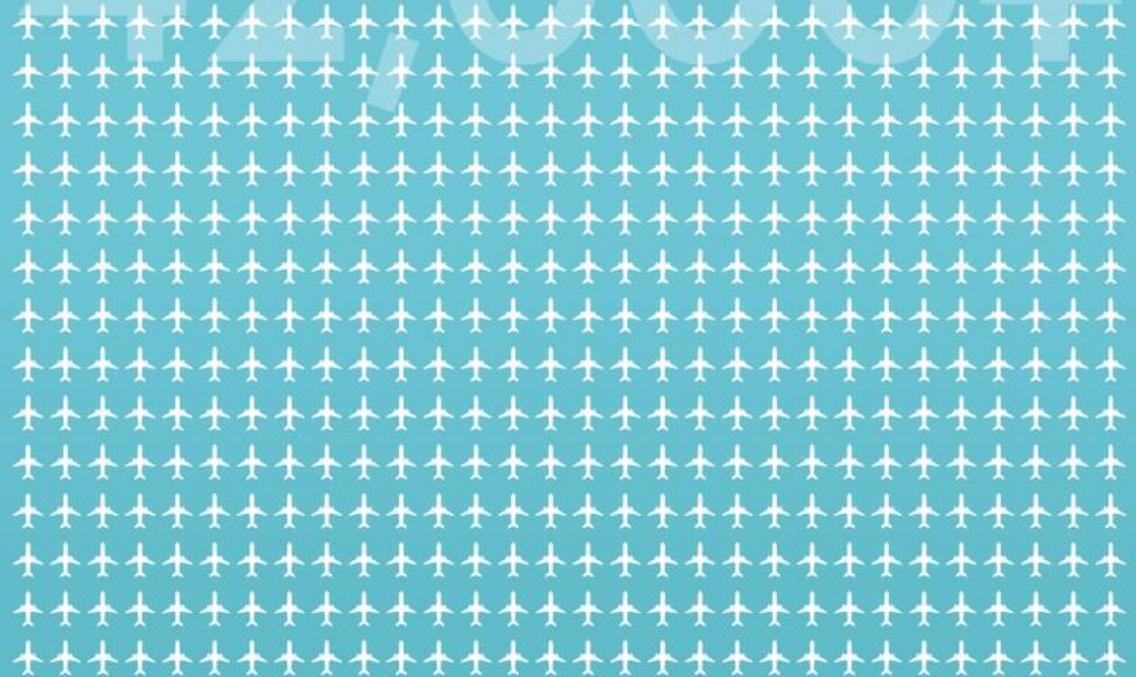
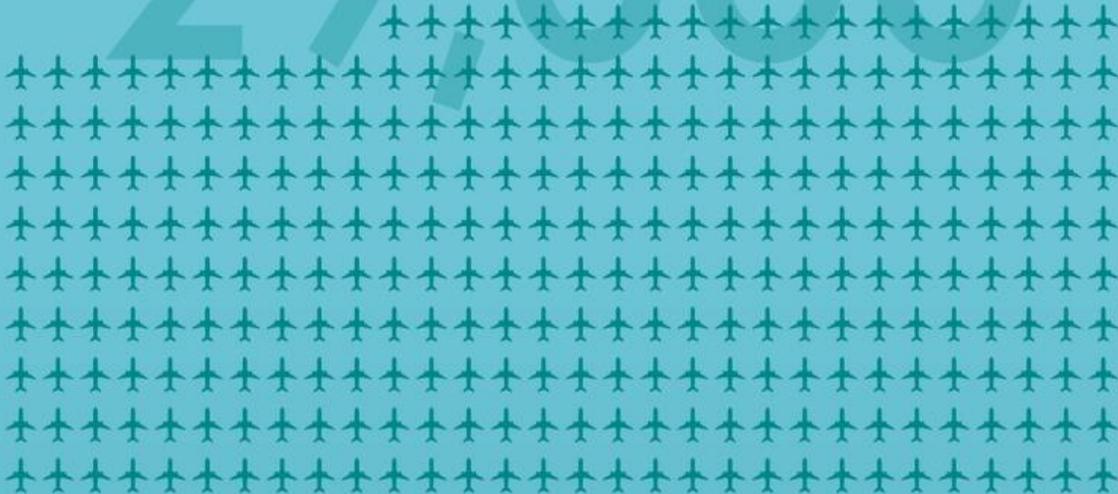


If nothing is done,
**aviation's share
of global emissions
could rise from
2 to 22%
by 2050.**

By 2042, the global aircraft fleet will be ~50% larger,
growing from 29,000 to 42,000+.

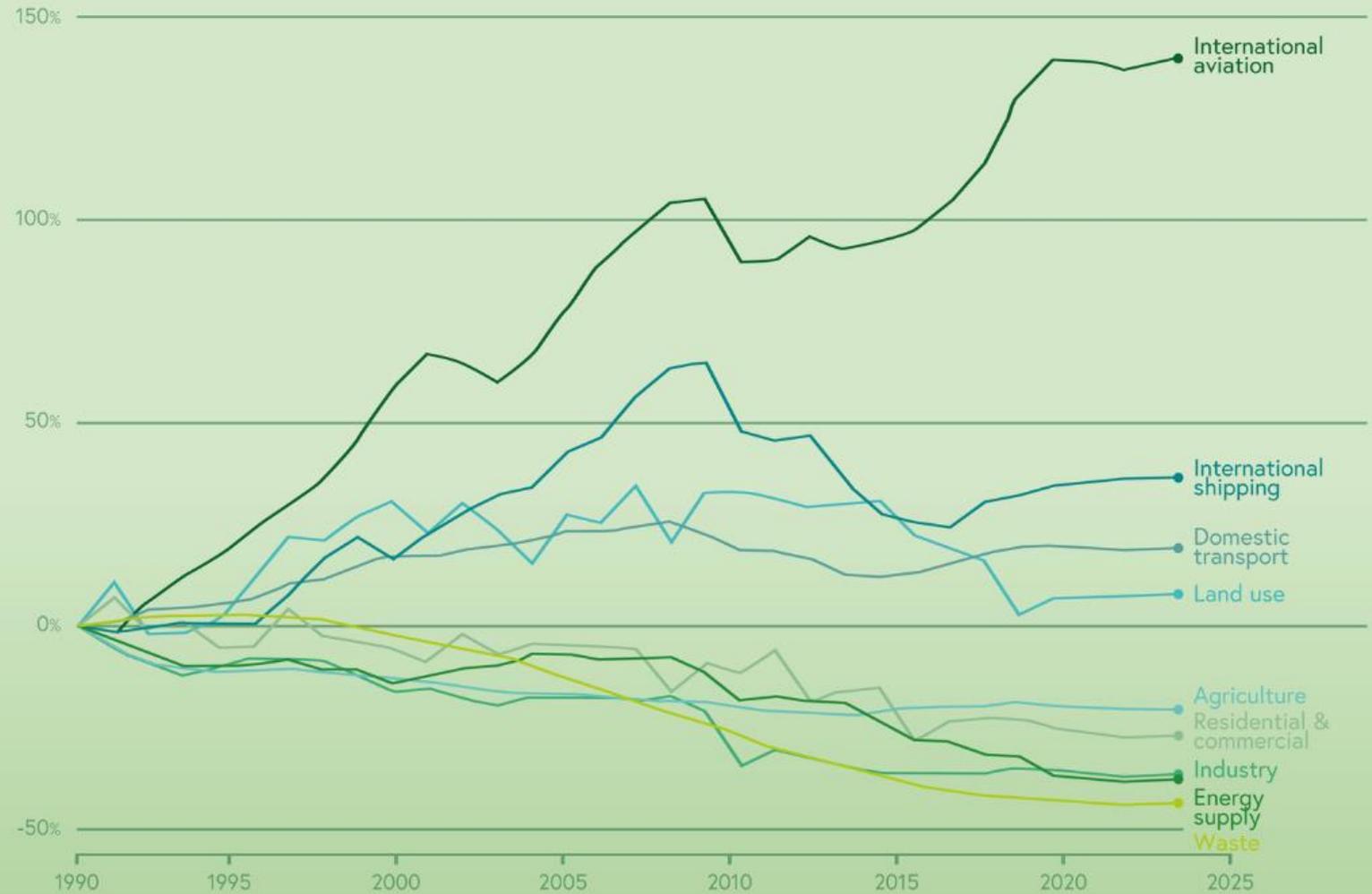


29,000 42,000+

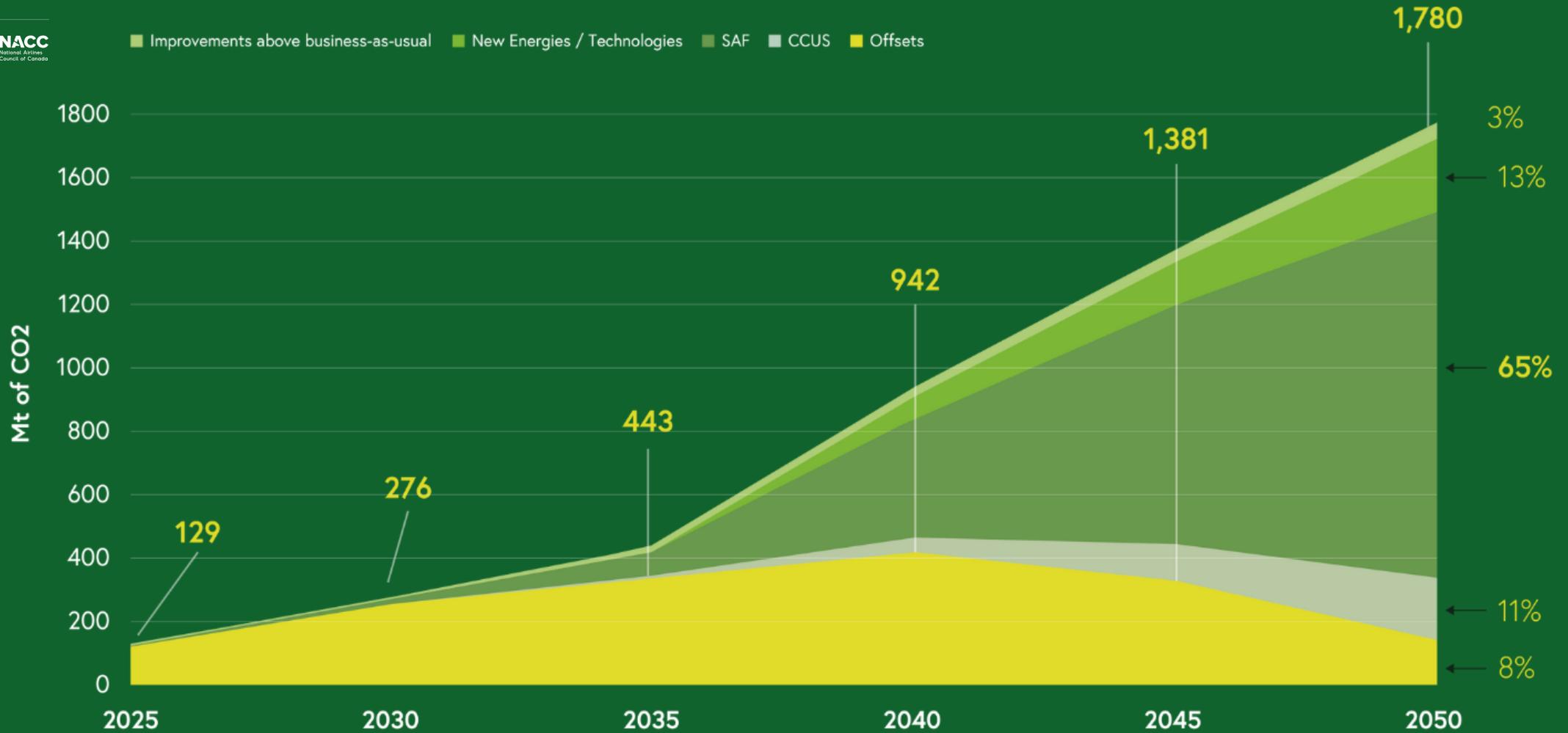


2023 2024 2025 2026 2027 2028 2029 2030 2031 2032 2033 2034 2035 2036 2037 2038 2039 2040 2041 2042 2043 2044 2045

Aviation's emissions have grown
dramatically and
disproportionately.



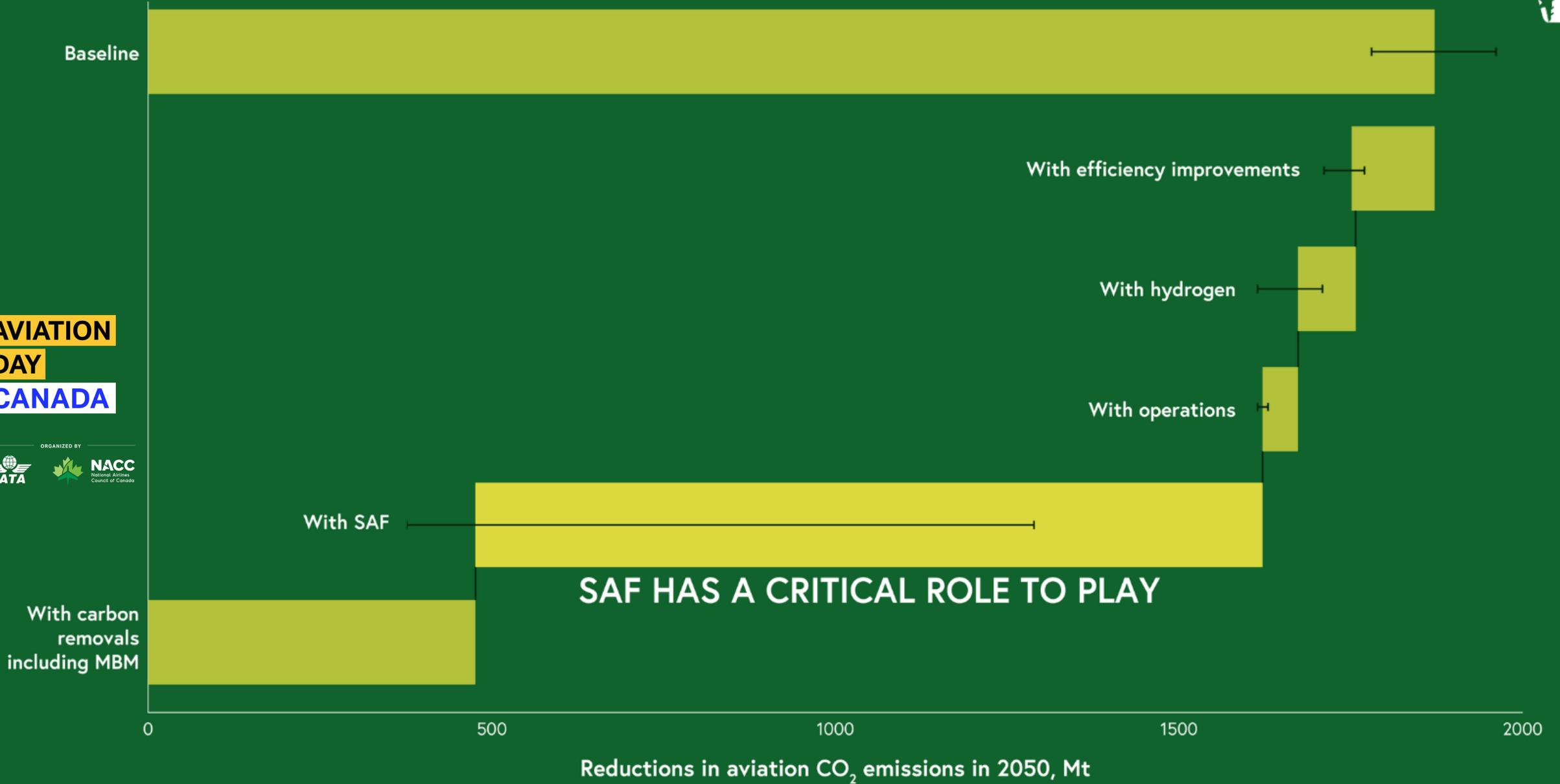
Evolution over time





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SAF HAS A CRITICAL ROLE TO PLAY

Source: IATA Sustainability and Economics, ICAO LTAG SAF availability scenarios

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150 SAF
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€250BN
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250 SAF
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\$400BN
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GOVERNMENT REGULATIONS: 2030 BLEND POLICY (OR EQUIVALENT)

Policy announced			Policy in discussion		
	Blend	Mt SAF needed		Blend	Mt SAF needed
USA	10%	9.08Mt	China		~3 Mt*
European Union	6%	3.58 Mt	Türkiye	5%*	.5 Mt
Norway	6% (30%*)	.06 Mt (0.3 Mt*)	UAE		.5 Mt
UK	10%	1.2 Mt	India	5%*	.4 Mt
Brazil	3%*	.145 Mt	Malaysia	1%*	.05 Mt
Singapore	3-5%	.68 Mt	Thailand	1%*	.07 Mt
Japan	10%*	1.365 Mt	Total (both columns)		20.73 Mt
Canada (BC only)	10%*	.1 Mt			

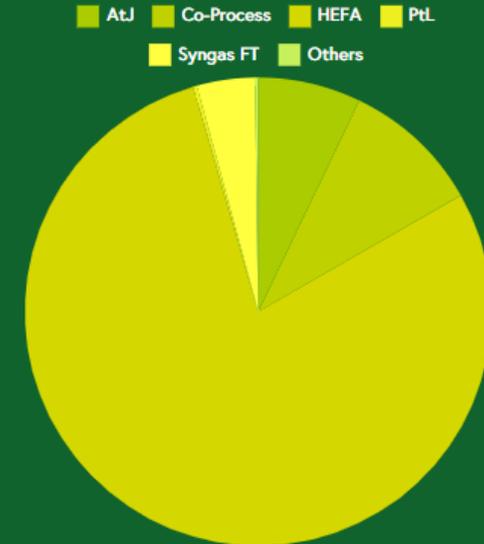
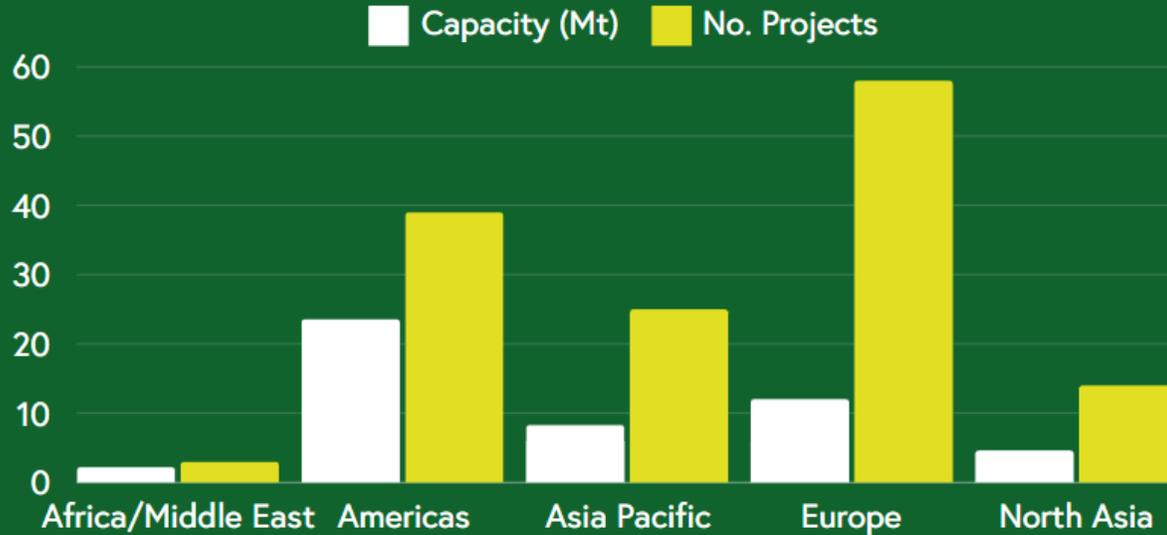


Source: atag.org

Mt of SAF required is an estimate based on traffic forecasts. **USA:** Grand challenge objective of 3 billion gallons in 2030. **Norway:** assume alignment with ReFuel EU, although could aim for higher (30% is current goal). **Brazil:** 3% emissions reduction requirement on domestic only, rising to 10% in 2037. **China:** Indication of 10% feasibility study (~6.5 Mt in 2035 - assume ramp-up). **UAE:** Target of 700 million litres being delivered

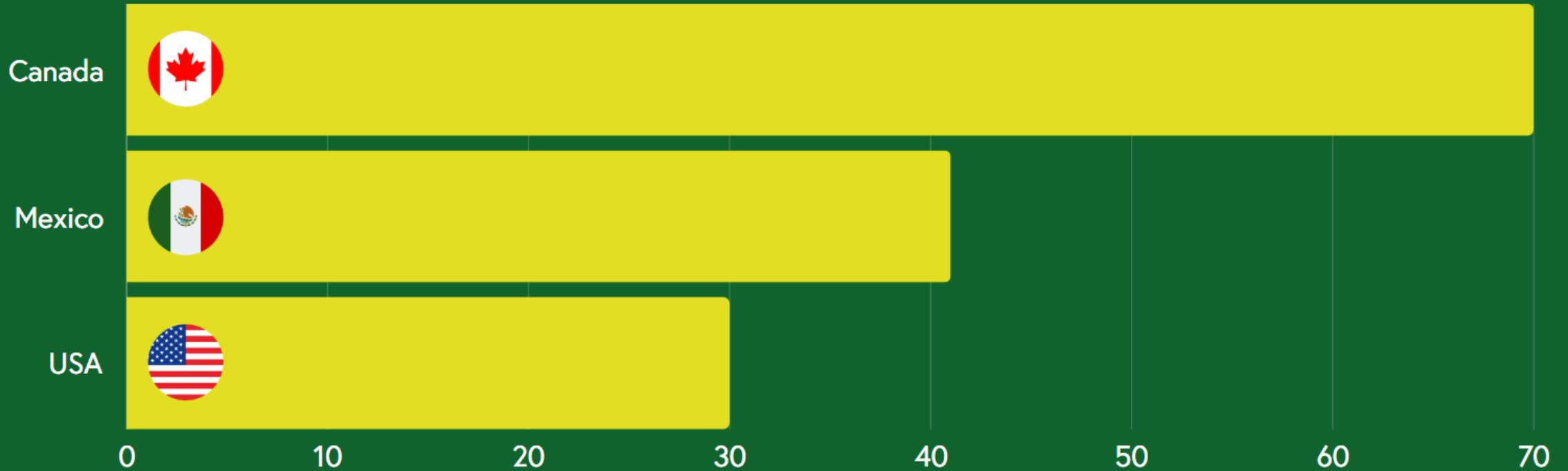


Renewable Fuel Capacity by region & technology by 2030

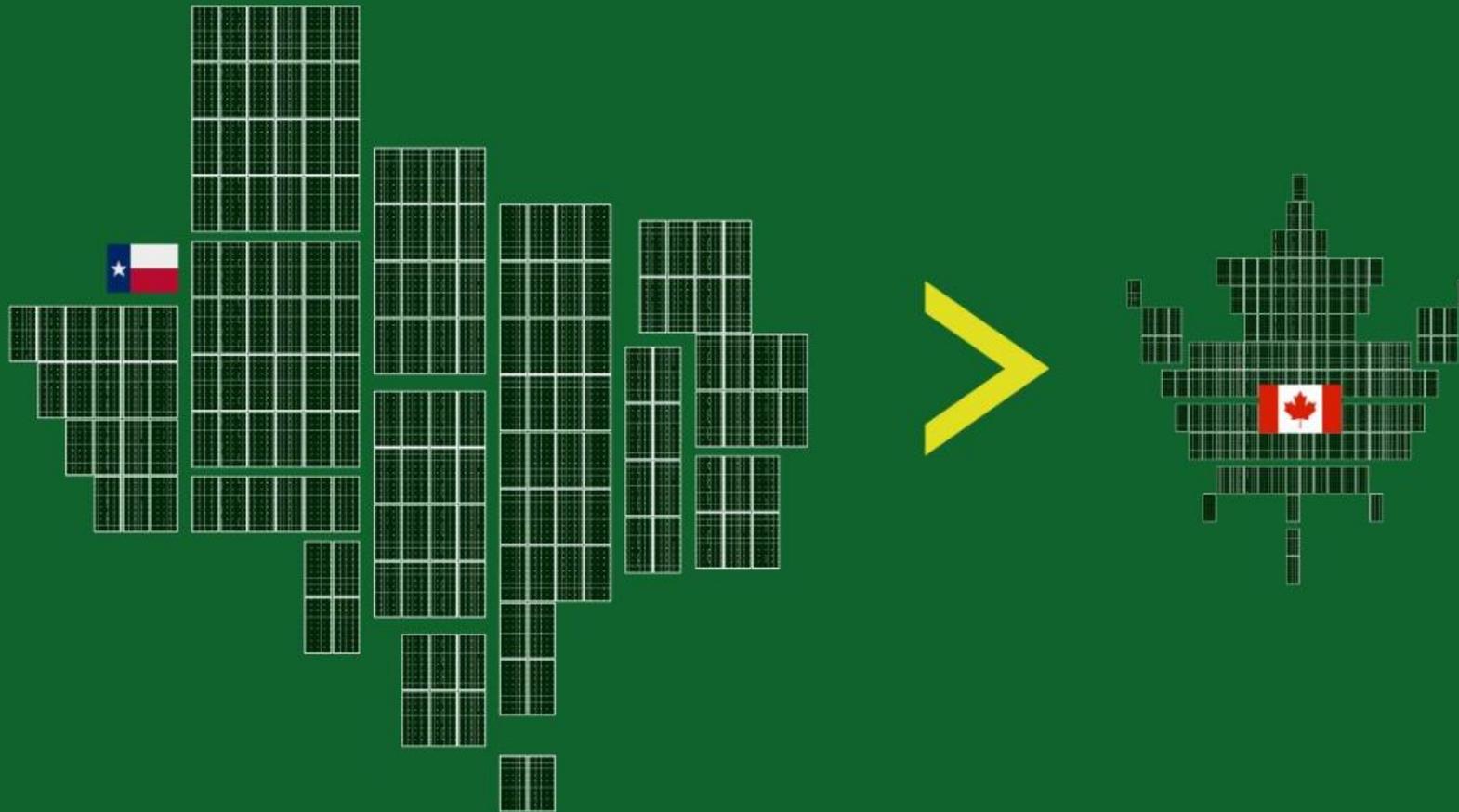


140 identified SAF projects, 100+ producers in 31 countries - but sluggish pace of commercialization
Government financing will be central to accelerate deployment of SAF technologies
Feedstock diversification, technology neutrality, and robust accounting framework are essential

Non-airline charges and sales taxes average over \$70 per ticket for a 1,250 mile domestic stage length adjusted flight in Canada between the top 8 cities, while the US is \$30, and Mexico is approximately \$40.



In the last year Texas has installed more solar energy than all of Canada has in its history



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