



International Coordinating Council of Aerospace Industries Associations

Newsletter

Summer 2022



A WORD FROM OUR CHAIR

Despite the challenges from high temperatures and travel difficulties, this summer has brought some great progress and achievements in the aviation world.

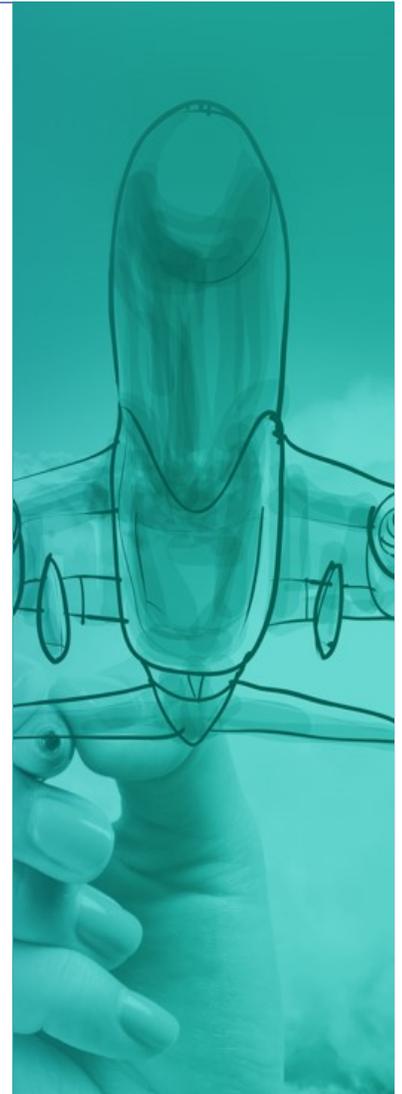
The first piece of good news is related to the fight against climate change. Following a year of advocacy work by ICCAIA and other industry organizations, both directly with Council members in Montreal and indirectly through ATAG in Geneva, ICAO has indicated its intent to adopt a Net Zero 2050 goal for carbon reduction in line with industry's already stated goal and ICCAIA's own targets. The details will have to be finalized at the Assembly, but the expectation for the goal has now been set by ICAO and it reinforces our pathways to Net Zero 2050, giving us the framework for regulatory certainty that we all desperately need.

Secondly, there is some relief from the challenges posed by sanctions against Russia, which have significantly impacted ICCAIA's ability to contribute to the technical work of ICAO. The European Council in Brussels has amended sanctions on Russia to allow "sharing of technical assistance ... in relation to aviation goods and technology", removing one barrier for ICCAIA manufacturers to provide technical support to ICAO activities. We are optimistic that a similar approach may be provided by the United States.

Finally, following an initiative from ICCAIA, the ICAO Council has approved a change to the implementation date for autonomous distress tracking, a requirement that a number of airframers were unable to comply with due to pandemic impacts. This has understandably been a very sensitive topic and a lot of work was needed to achieve a proposal acceptable to States.

As we continue towards fall, all eyes are on the ICAO Assembly in September/October, where ICCAIA will present 12 papers, on topics ranging from innovation and environment through to specific technical subjects such as halon replacement and the certification of firefighting aircraft. Before we get into the thick of the event itself, I hope that many of you are enjoying some well-earned vacation time.

Jan Pie, Chair, ICCAIA



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SPECIAL POINTS OF INTEREST

- ICCAIA participation in the ICAO High-Level Meeting on LTAG
- ICCAIA Management Crisis Committee Launch

ICCAIA JOINS THE UNFCCC-COP AS A 'PROVISIONAL OBSERVER'

An important milestone in aerospace industry participation to a key group responsible for global environment policy was reached in June as ICCAIA was granted 'Provisional Observer' status at the UNFCCC-COP – the United Nations Framework Convention on Climate Change – Congress Of Parties.

The UNFCCC is responsible for the Kyoto Protocol, adopted in 1997, and the more recent Paris Agreement that aims to limit global temperature increase. Whilst International Aviation climate policy is managed by ICAO, domestic aviation policy falls under the remit of the UNFCCC as a part of the Nationally Determined Contribution (NDC) of each individual State, and so is subject to actions

being taken to limit temperature increase as a part of the Paris Agreement. ICCAIA's Board of Directors felt that it was important that we have a voice in this forum, and so the application process was begun in August of 2021. The final ratification of our status as an Observer is due to take place at a meeting of the UNFCCC in late November.

As an Observer, ICCAIA will be allowed to send a delegation to participate in the COP27 meeting that will take place in Sharm el-Sheikh, Egypt, in November of this year. We will provide a follow-up report once that meeting has concluded.

The International Coordinating Council of Aerospace Industries Associations joins the UNFCCC COP and launches a new Health, Facilitation and Crisis Response Committee

ICCAIA HEALTH, FACILITATION AND CRISIS RESPONSE COMMITTEE LAUNCH

ICCAIA's Board of Directors has agreed to create a new permanent committee, reporting to the Strategy Committee, to deal with the topics of Health, Facilitation and Crisis Response. COVID-19 response and recovery has been led during the pandemic by ad-hoc groups who have delivered excellent expert advice and guidance to the ICAO Council and ICCAIA's membership. Looking forward, ICAO has recognized that work is needed to bring together and enhance health related standards, recommended practices and guidance to prepare for future crises and build on lessons learned from the COVID pandemic. There is also ongoing work through CAPSCA and its working group on innovation, and a need for representation at the Facilitation Panel and its working groups.

In addition, the High Level Conference on Covid-19 in October 2021 recommended the creation of a framework for crisis response including both health and broader crisis topics. The new Committee will ensure a consistent and organized approach to these topics, and ensure representation of ICCAIA's members' interests.

Candidates for the committee are being sought from ICCAIA's membership. Interested parties should contact Nina Brooks: nbrooks@iccaia.org



ANC TALK - ADVANCED AIR MOBILITY

Brenden Hedblom, Head of Traffic Management Solutions from EVE Air Mobility, spoke to the ICAO Air Navigation Commission in June about Advanced Air Mobility (AAM) and what it means for a fundamentally different future for urban and regional air services.

AAM will bring radical advances in automation, different approaches to air traffic services and the use of technology, including eVTOL (electric vertical take-off and landing vehicle), electric propulsion and digitized air traffic management.

Brenden highlighted the need for agreement on topics beyond eVTOL - a pathway towards unified traffic management that includes fair and equitable access to airspace. More than just scaling air traffic management systems, industry and regulators need to determine how to support a harmonized and integrated ecosystem.

UAM Operating Environment & Traffic Management Overview

Future of UAM operations

- Operations will increase in tempo, density, & complexity
- More flights with short turnaround times and less notice
- Multiple vertiports will support multiple operators
- eVTOLs will have unique performance capabilities (i.e., endurance)
- Increase in other airspace users, both UAM & others (i.e., UAS)

Will require a new paradigm of ATM

- Procedures & services tailored for a complex urban environment
- Integration across all stakeholders to support access & equity
- Increased automation, reducing reliance on conventional ATC
- New responsibilities on operators to collaboratively manage flights and ground infrastructure resource availability



Urban Air Traffic Management

A holistic, integrated approach to safely enable and scale UAM for all airspace users with services tailored to needs of each stakeholder to support efficient operations and resource optimizations

Although there are different approaches and even terminology used across the world, there is a lot of commonality in challenges; it will be important to take stock and develop frameworks and models on a global level that can then be tailored to each specific region, city and operation. There is more work to be done, but we are on the cusp of a globally harmonized approach as things develop.

The business case for eVTOL relies on the cooperation with actors traditionally outside of aviation operations, such as urban planners, terrestrial traffic management and emergency services. Expectations are likely to differ on how solutions can support the introduction of UAM into cities based on various factors. For example, Sao Paulo, which is home to the busiest air taxi market in the world, where social acceptance occurred organically, still has procedural limitations on the number of simultaneous helicopter operations due to the proximity of the surrounding airports. In contrast, London, which Eve used as a Use Case as part of the UK CAA Regulatory Sandbox, brought a new perspective on local acceptability due to the lower volume of current operations. However, challenges related to scaling operations, flying in a congested obstacle environment and in close proximity to other low-flying aircraft are similar across the two cities. A global framework can be used as a basis to support that effort as AAM is introduced across the world.

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UAM Challenges for New Operations

<p>Sharing airspace Additional number of flight in normally congested airspace with multiple operators seeking access</p> <p>Higher volume & higher tempo operations Current operational, equipment, and regulatory shortfalls limit capacity of urban environment</p> <p>Legacy systems lack integration & automation Solutions rely on multiple data sources, manual data entry, & are isolated from other stakeholders</p> <p>Lack of flight planning requirements Visual flight rules & uncontrolled airspace do not require flight planning, limiting coordination in congested airspace</p>	<p>High ground infrastructure utilization Flow management for network of vertiports essential to optimize resource constraints in a dynamic environment</p> <p>Controlled Airspace Access to controlled airspace not guaranteed – clearances by ATC may require holding</p> <p>Flights into Airports Good locations for business case are complex for airspace access (approach and vertiport locations)</p> <p>Electric aircraft performance constraints Confirmed resource availability, including airspace, vertiports, & alternates key to ensuring safe operations</p>
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If airspace integration and traffic management challenges are not addressed, the ability to achieve the UAM/AAM business case is at risk

Looking at ICAO’s role, it will be critical that fundamental principles for safety are still adhered to and equivalent safety levels are met, as well as avoiding disruption to international aviation. Most importantly for the AAM business, there need to be close cooperation and incremental work to ensure compatibility with the existing and future regulatory framework to allow thinking to converge on air traffic management and flight rules.

ICCAIA will be presenting a paper to the 41st Assembly on Urban Air Mobility and expects increased focus on the topic at ICAO in the coming months and years.

THE ICAO GENERAL ASSEMBLY – WHAT IT’S ALL ABOUT

27th September to 7th October will see ICAO hold its 41st triennial General Assembly at the ICAO headquarters in Montreal, bringing together 193 States, industry and other stakeholders in the aviation system. Many of you will have heard that this is happening, but what is it all about and why is it important to the aerospace manufacturing community?

The ICAO General Assembly has two major roles. The first is to elect the 36 ICAO Council Members for the following triennium from amongst the 193 Member States. This is done quite early during the two-week meeting and is completed in three phases. The first phase sees 11 “Part 1” States elected to the Council, which are defined as “States of chief importance in air transport”. Those “Part 1” States are also where the primary airframe and engine manufacturers are generally located and so form the main points of interaction for the ICCAIA Staff in Montreal. The second phase elects 12 “Part 2 “ States, that are defined as the States not elected in Part 1 but “which make the largest contribution to the provision of facilities for international aviation”. Many of those States host major MRO and service providers along with some of the world’s major airlines. The final round, “Part 3”, sees the remainder of the Council positions made available to ensure a geographic balance. Those 36 States of the Council will go on to oversee the work which is conducted during the following three years.

The second major role of the General Assembly is to task ICAO with the work to be conducted over that following three-year period across all aspects of civil aviation. Some of those work items will be policy-driven, for example on environmental tasks or on aviation recovery in the wake of the COVID pandemic, and others will be technical in nature. For that reason, an Executive Committee session that considers some of the ‘big-ticket’ policy items is convened first with all of the stakeholders present. The 41st Assembly will consider items such as the outcomes of the High Level Conference on COVID-19, Facilitation (the transit of people and goods across borders), Aviation Security, Cybersecurity and Environmental Protection in the first session, all of which are of critical interest to our community.

Following the Executive Committee, the Assembly breaks out into smaller, parallel, sessions to consider technical items in the Technical Commission, financial issues in the Economic Commission and legal issues in the Legal Commission before reconvening in a plenary session to bring all of the separate threads together. States, industry, including ICCAIA, and other stakeholders will present their case in the various different sessions to include items of interest on the work programme going forward. For ICCAIA, these Working Papers give us the opportunity to bring new technical issues, such as around the certification of firefighting aircraft or improvement in the operations for regional aircraft, along with proposals for the way that ICAO can be structured to be ready for the new technologies that the manufacturing community will bring to market, be that new vehicles, new propulsion systems or new modes of operation. Finally, one very significant outcome will entail a vision for how ICAO will structure itself to be better prepared for future crises, whether they be in health or other issues, to avoid the shutdown of the air transport system that we have all recently experienced.

In short, the General Assembly is of critical importance to ICCAIA and its membership as it determines in which areas future regulation will appear and it gives us the opportunity to help to shape that regulatory landscape. Without our inputs and influence, there is a risk that some regulations may have unintended consequences that hinder our business or prevent new business models from flourishing.

*ICCAIA will have its finger
on the pulse of the
General Assembly to work
for the benefit of all of our
collective interests*

SPOTLIGHT ON RPAS

The Remotely Piloted Aircraft System (RPAS) panel has been working on a large number of changes to several ICAO annexes, PANS, and documents, in support of the requirements for safely integrating RPAS into the aviation system.

One of the biggest changes is a new Part IV to Annex 6, Operation of Aircraft, which is under review for likely implementation in Q3 2024. A State letter is expected soon, which will invite States and Industry comment.

There are ongoing discussions about how Advanced Air Mobility should be included in this work with broad agreement that it should be addressed holistically, but recognizing that much of the work may be completed outside of ICAO. The creation of a study group to work on scoping is under discussion, with terms of reference to be discussed in fall.

ABOUT ICCAIA

ICCAIA's members are engaged in the design, development, manufacture and in-service support of aeronautical and space products and technologies, including related ground-based systems and services.

Recognized by the International Civil Aviation Organization (ICAO), ICCAIA provides an avenue for the world's aerospace manufacturers and service providers to offer their industry expertise toward the development of the international standards and regulations necessary for the safety, security, efficiency and sustainability of air transport.

Find out more on www.iccaia.org

CALENDAR - FALL 2022

06-09 September	Montreal	Information Management Panel IMP/3
13-15 September	Montreal	ICAO TRIP Symposium
23-25 September	Montreal	ICAO Innovation Fair
26 September	Montreal	ICCAIA Board Meeting
26 September	Montreal	ICCAIA 50th Anniversary Celebration
27 Sept - 14 October	Montreal	41 st Session of ICAO Assembly
01-13 November	Abu Dhabi	Middle East Region DGCA Meeting
14-17 November	Montreal	Drone Enable
07-10 November	Montreal	RPAS-Symposium/2022
07-11 November	Montreal	Airworthiness Panel AIRP/9
09-11 November	Lisbon, Portugal	IAWA Annual Conference - ICCAIA presenting
06-18 November	Sharm el-Sheikh, Egypt	COP27 meeting
14-25 November	Montreal	Personnel Training and Licensing Panel PLTP/3
28 November-02 December	Montreal	Flight Operations Panel FLTOPSP/9
05-16 December	Montreal	Navigation Systems Panel

AUTONOMOUS DISTRESS TRACKING (ADT)

At the end of 2021, several aircraft manufacturers raised concerns that due to the COVID-19 pandemic's impact on the industry including supply chain and staffing issues and a large number of aircraft that were not able to be delivered during the pandemic, they would not be able to meet the applicability date of January 1st 2023 for transmission of location of an aircraft in distress in accordance with Annex 6 requirements.

Following lengthy deliberations by the Air Navigation Commission, a paper was presented to the ICAO Council on June 18th, requesting a delay in the date of applicability for the standard. This request has been approved by the Council, and a State Letter has been sent to inform States of the change. Once issued, the amended standard would read "6.18.1 - As of 1 January 2025, all aeroplanes of a maximum certificated take-off mass of over 27 000 kg for which the individual certificate of airworthiness is first issued on or after 1 January 2024, shall autonomously transmit information from which a position can be determined by the operator at least once every minute, when in distress, in accordance with Appendix 9."

ICAO Cybersecurity Panel First Meeting 16-20 May 2022

In May 2022, the Chairman of the Security Committee, Xavier Depin, participated in the inaugural meeting of the CYSECP - ICAO's brand new Cybersecurity Panel. This virtual meeting was attended by 177 members, advisors and observers nominated by 69 Member States and 16 international organisations and industry associations.

The Cybersecurity Panel represents an evolution of the Secretariat's Cybersecurity Task Force (CSTF). As such, most of the tasks currently undertaken by the SSGC were assigned to the CYSECP at its first meeting. These tasks cover a wide range of international civil aviation disciplines, such as safety, Aviation security, air navigation and risk management in relation to cyber security. Discussions focused on the need to include provisions in the annexes to the Chicago Convention, the auditing of cybersecurity requirements under the USAP programme, the need for awareness initiatives and coordination across other expert groups. Working Groups were created on Cyber Threat and Risk, and Cybersecurity Guidance material, and have already completed their first meetings.

ICCAIA members interested in participating in the panel or its working groups should contact Xavier Depin. email: xavier.depin@airbus.com

ICAO HLM-LTAG

Representatives from ICCAIA have been participating in the ICAO High Level Meeting on the Long Term Aspirational Goal for CO2 reduction (HLM-LTAG) from 19-22 July in Montreal. After the publication of the ICAO Committee on Aviation Environmental Protection (CAEP) LTAG technical report in March of 2022, to which over 70 ICCAIA technical experts contributed, the HLM-LTAG aims to bring together the technical capability with the political ambition. ICCAIA has already committed to supporting a goal of Net Zero aviation emissions in international civil operations by 2050 in common with the other major sectors of the aerospace industry (airlines, airports and air navigation service pro-



Representatives from ICCAIA, ATAG, IBAC, CANSO, Airbus and Gulfstream discuss the industry approach.

viders), and is working through the Air Transport Action Group (ATAG) to encourage States to adopt a similarly ambitious political goal.

HLM-LTAG OUTCOMES

By Haldane Dodd, Executive Director, Air Transport Action Group (ATAG)



A few weeks ago, the wider aviation community showed one of our collective strengths at the ICAO High Level Meeting on a long-term climate goal for the sector. Against geopolitical pressure and some very big and far-reaching questions and concerns, governments came to an agreement and adopted conclusion text which makes progress towards a net-zero carbon by 2050 commitment. This still needs to be adopted by the ICAO Assembly in late September, but the fact that such an agreement was already reached shows how aviation can get things done.

The work at ICAO builds upon an industry pledge to net-zero reached last year. It is fair to say that the aviation industry – through tight collaboration amongst the global industry associations of ACI, IATA, CANSO, IBAC and ICCAIA, coordinated by ATAG – has been a leader in taking long-term climate action seriously. Having a collective industry goal backed up by a United Nations objective will help ensure governments share some of the responsibility for meeting the challenge.

Whilst continued support for technology research and development is vital, perhaps the most important requirement for policy support will be to boost scale up of both supply and demand for sustainable aviation fuels. Currently comprising less than 1% of total aviation fuel use worldwide, we need to see this shift to an almost complete replacement of fossil fuel by mid-century if we are to meet our net-zero commitment.

Having the long-term goal at the UN level will ensure a common trajectory and stability of global-level policy which will provide the certainty for corporate decision making to invest in SAF production facilities as well as make decisions on technology development and deployment. But we also have to remember that Governments will only get us part of the way to hitting an agreement – we have the responsibility for a lot of the heavy lifting ourselves in industry.

Once we get an ICAO agreement, we will then need to set about convincing governments in all parts of the world to support through national policy measures and build coalitions of private and institutional investors to help finance the transition to net-zero. Our stakeholders are calling for action: particularly corporate customers buying significant quantities of airline tickets; the investment and shareholder community; and our employees.

As part of the industry effort to get an agreement at ICAO this year, ATAG gathered the voices of young aviation professionals from across the world in a video message to governments. They are starting out in their aviation careers. They will still be working in our sector in 2050 and they are united in their views that a truly sustainable industry is vital for their own futures as well as the future of connectivity provided by aviation. Their message is here:

<https://youtu.be/OMCnZn4GJAE>

As we demonstrated in the ATAG Waypoint 2050 report (www.aviationbenefits.org/W2050), net-zero is achievable by 2050, but it will be a significant challenge. In aviation, we are used to overcoming significant challenges: we do it every day all over the world. Given our industry commitment and with the support of governments looking like it is on track, I am ever more confident that we can rise to the challenge this time as well.



ACKNOWLEDGEMENTS

ICCAIA would like to sincerely thank all of the contributors to this newsletter, the Committee Chairs and Working Group leads. We would welcome contributions from all members for future issues.

Please let us have your feedback and ideas for future topics at info@iccaia.org