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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

# HOST AIRLINES



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## Access to simultaneous French translation



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## Social Media



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## WiFi



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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  
Canada



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# Government of Canada's Air Transport Vision



**Arun Thangaraj**

Deputy Minister of Transport  
Canada



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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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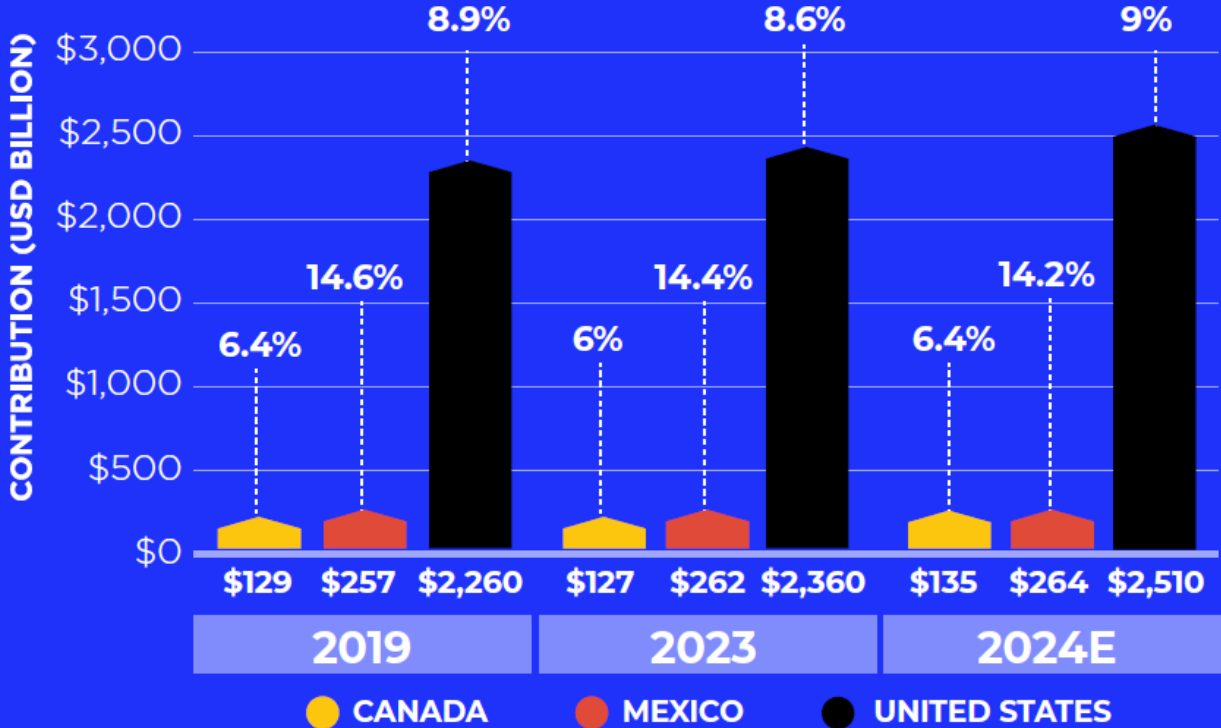


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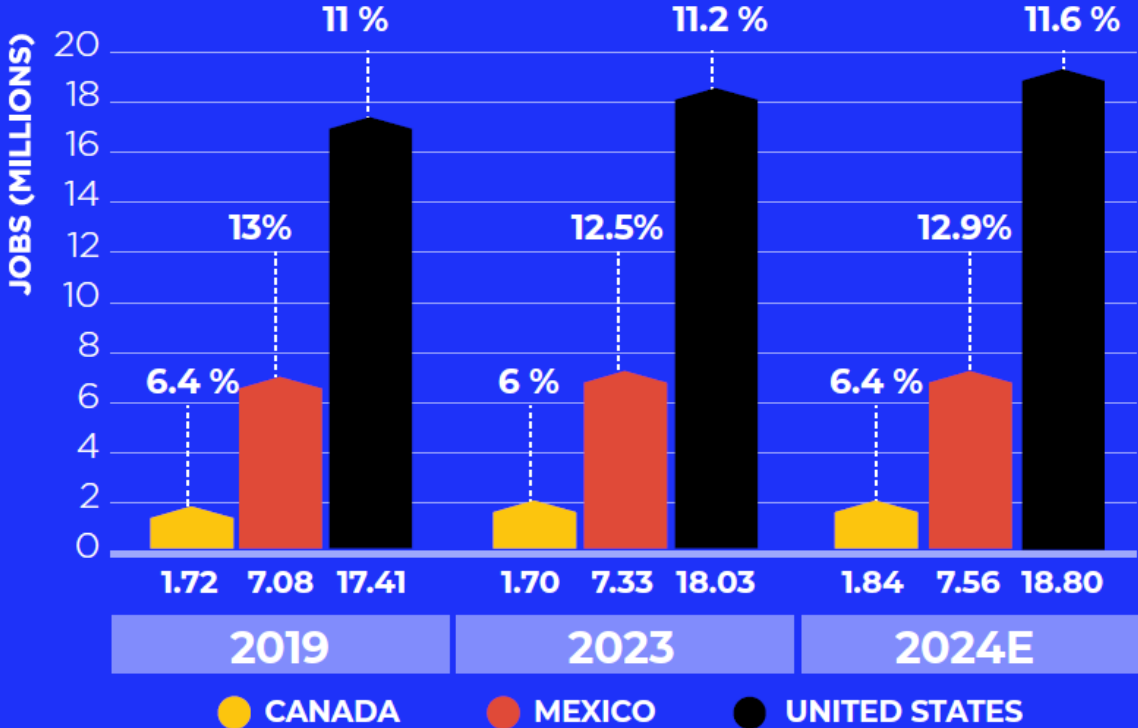
# Benefits of Air Transport and Tourism in Canada



## 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

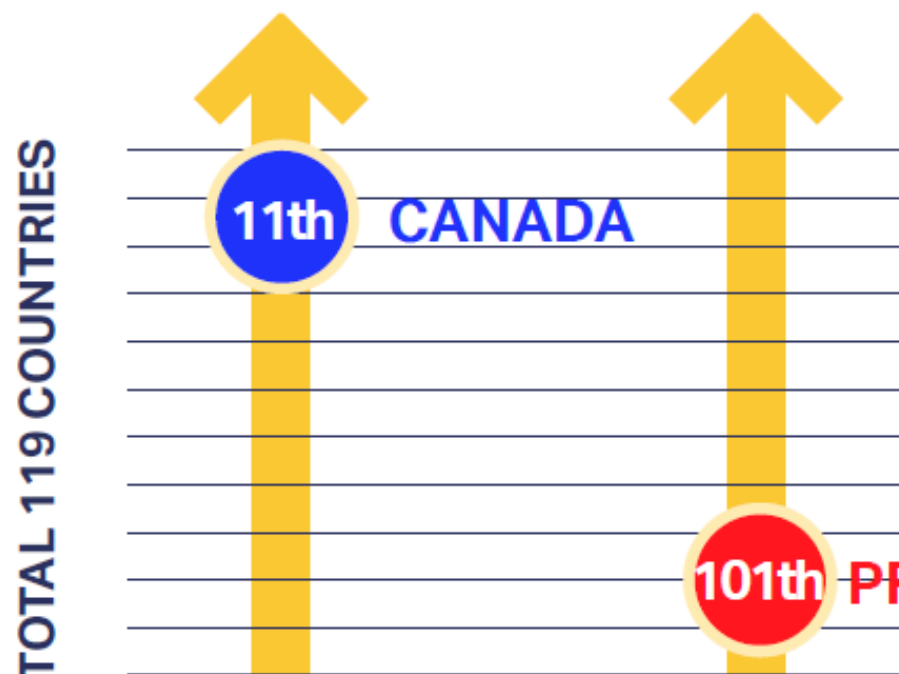
Passenger Facility Charge
\$ 12.32 CAD ≈ \$ 9 USD
September 11 Security Fee
\$ 15.33 CAD ≈ \$ 11.2 USD
Navigation Fees
✗ Not Applicable
✗ Not Applicable



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



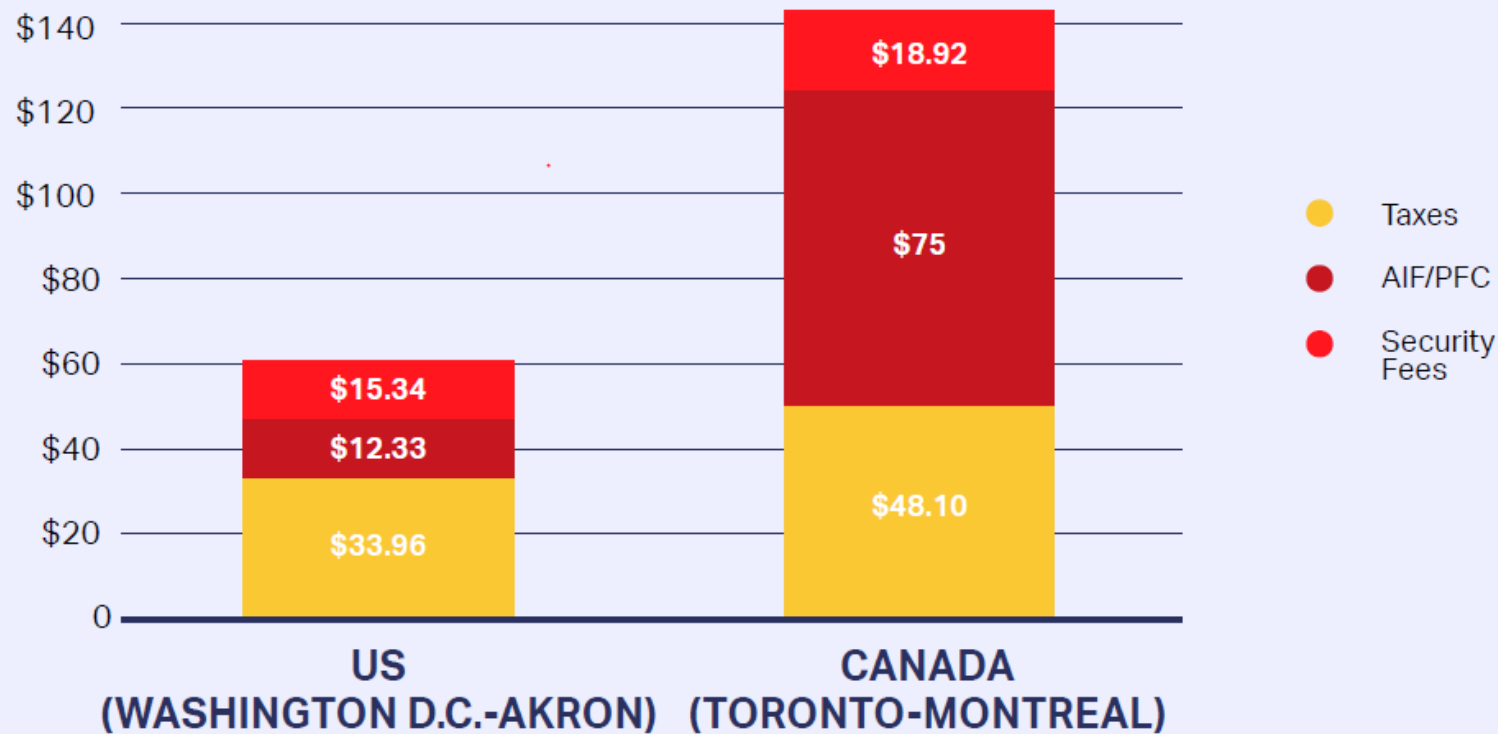
According to the 2024 Travel & Tourism Competitiveness Index by the World Economic Forum, **Canada ranks 11th among 116 countries**. However, Canada's price competitiveness is low, **ranking 101st**.





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

In CAD



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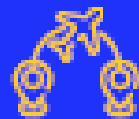


We urge the Canadian government to review its approach toward aviation and implement policies that support growth and affordability while promoting this incredible economic engine.





## 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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## Agenda

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

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

MODERATOR



**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

- 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

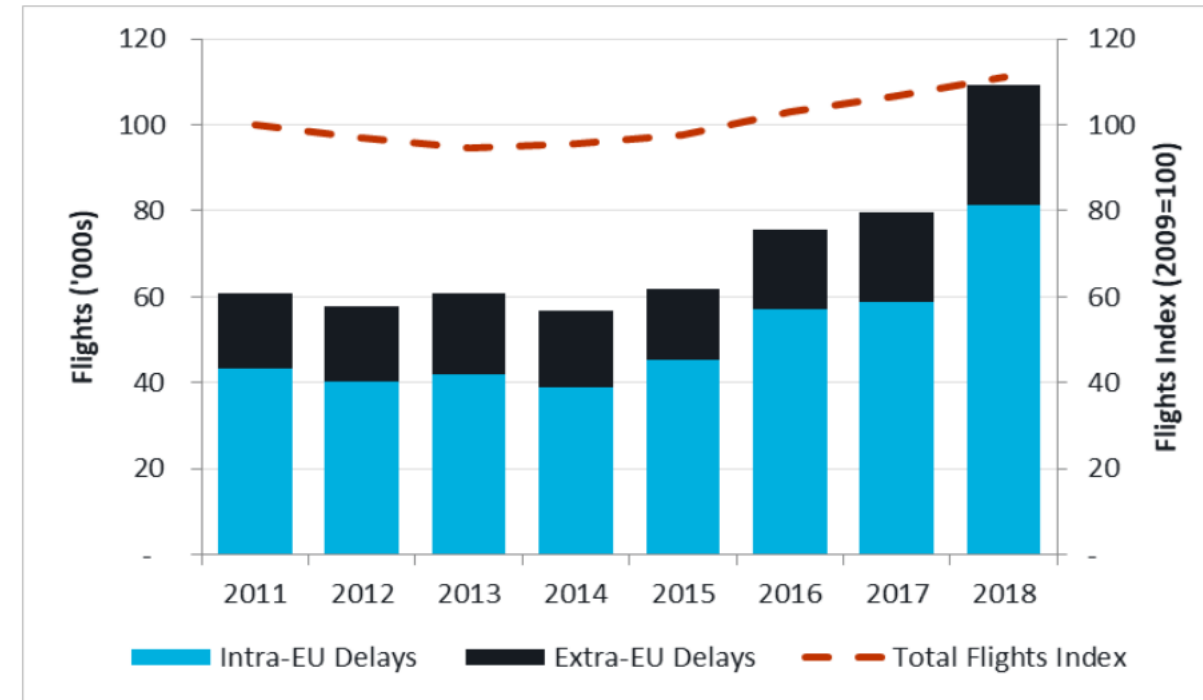
- EU Regulation 261 / 2004 intended to influence commercial decisions made by carriers
- Legal interpretations mean that most claims under EU261 relate to operational disruption
- 2009 *Sturgeon* case - CJEU judged that a long delay is *de facto* equivalent to a cancellation
- Delay compensation being 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

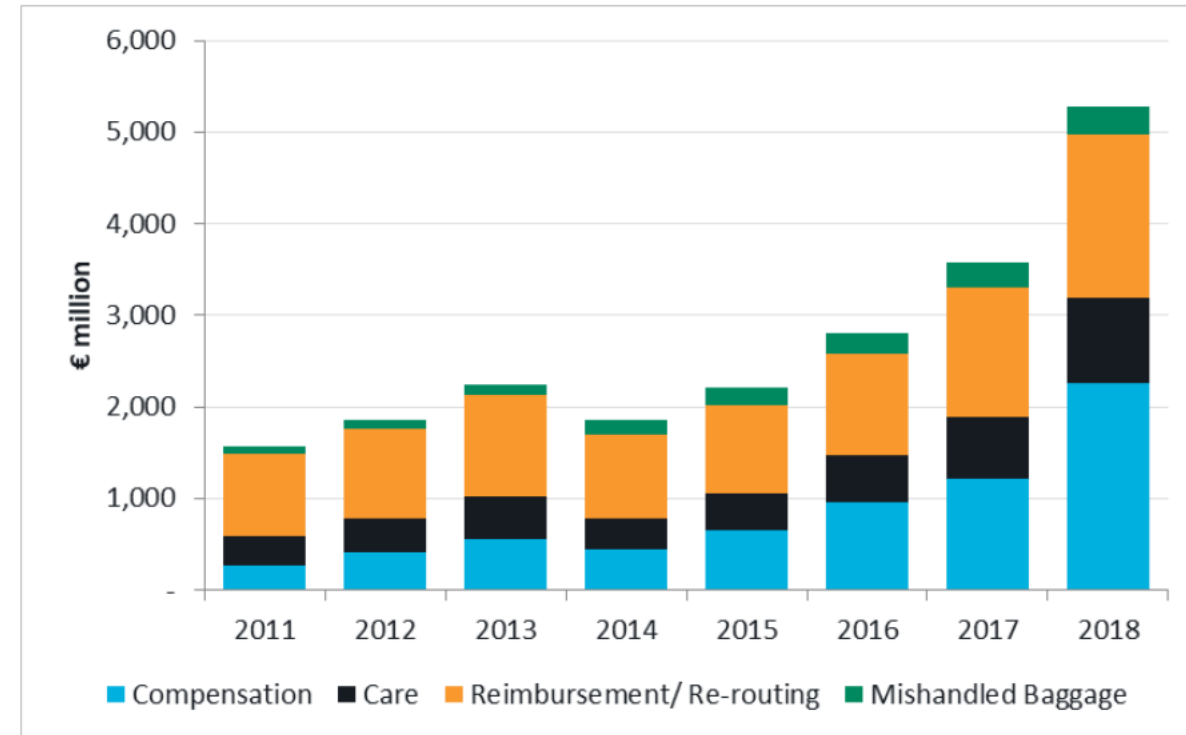


# Compensation regimes drive up the cost of travel

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

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

MODERATOR



**Doug Lavin**

Vice President, Member  
and External Relations  
North America, IATA



**Robert Kokonis**

President &  
Managing Director,  
AirTrav Inc.



**Ronc Almond**

Managing Director  
International  
Government Affairs,  
American Airlines



**Laura Dawson**

Executive  
Director, Future  
Borders Coalition



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## Remarks

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**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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SUSTAINABILITY  
IN THE AIR

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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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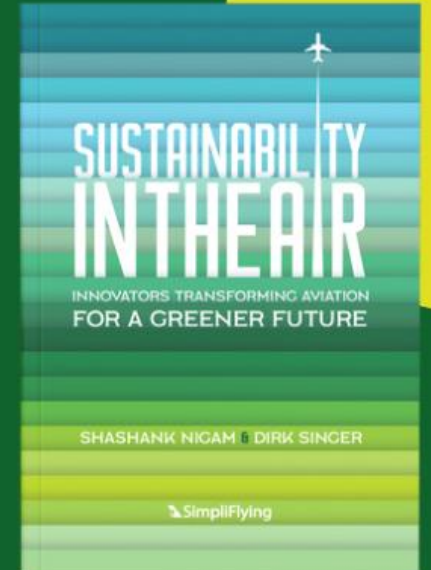
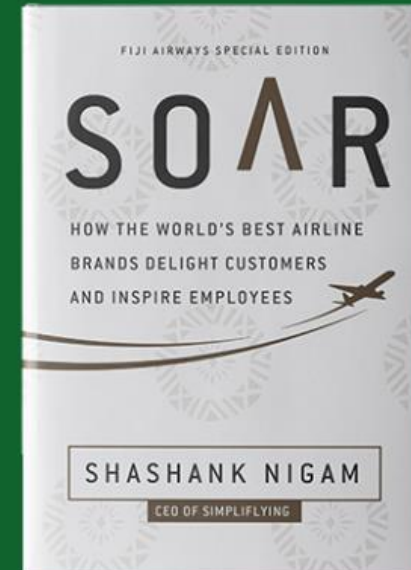
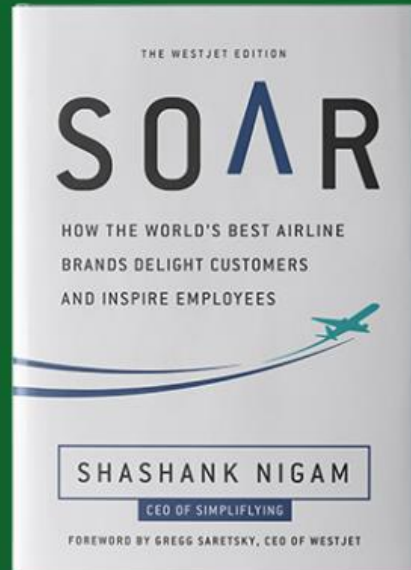
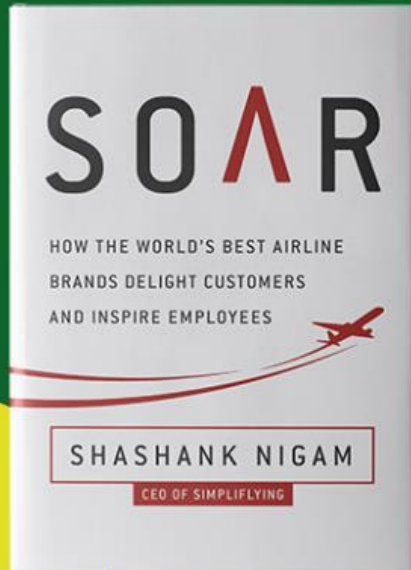


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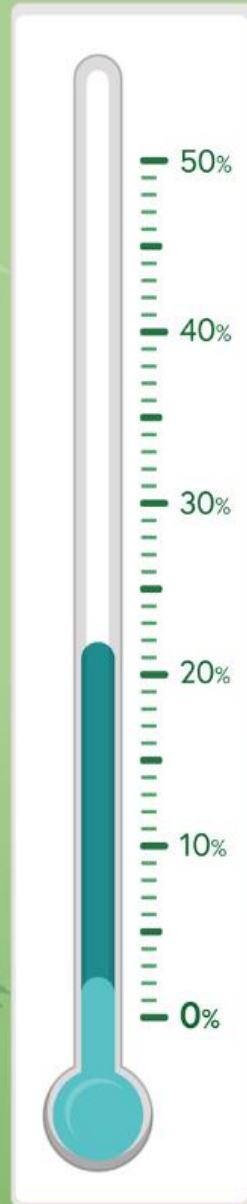
Source: TSA screening data

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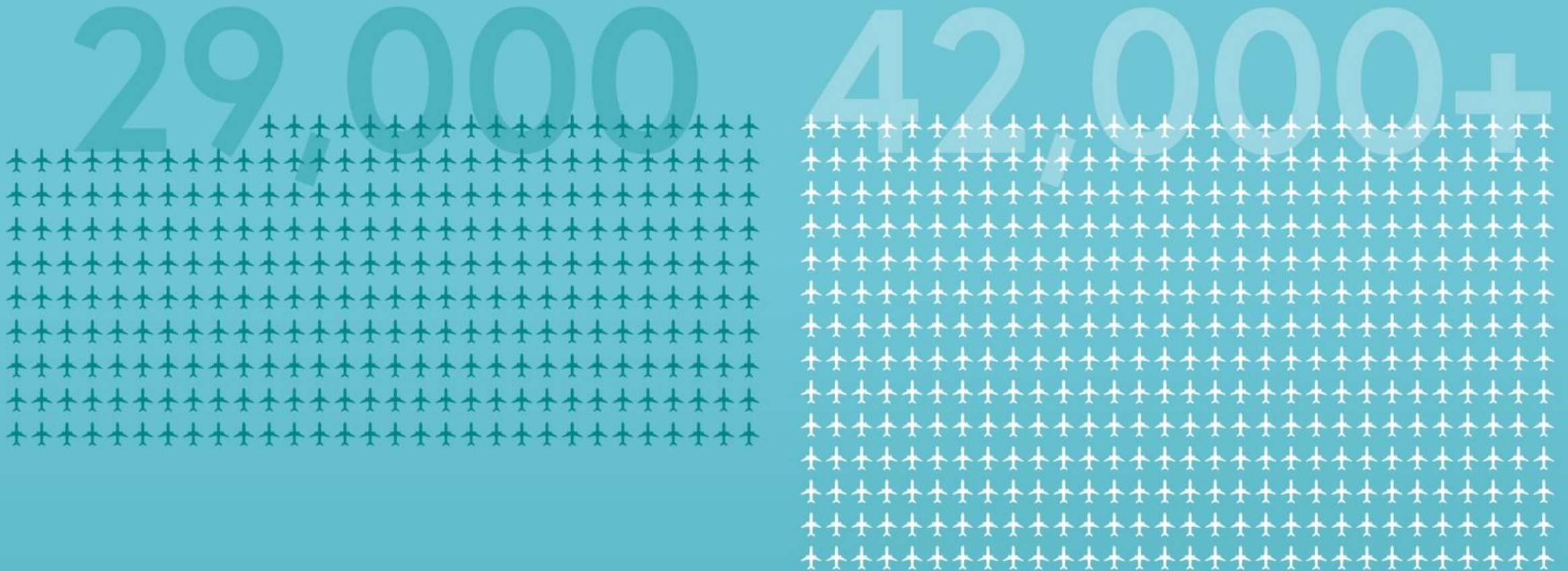
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If nothing is done,  
**aviation's share  
of global emissions  
could rise from  
2 to 22%  
by 2050.**

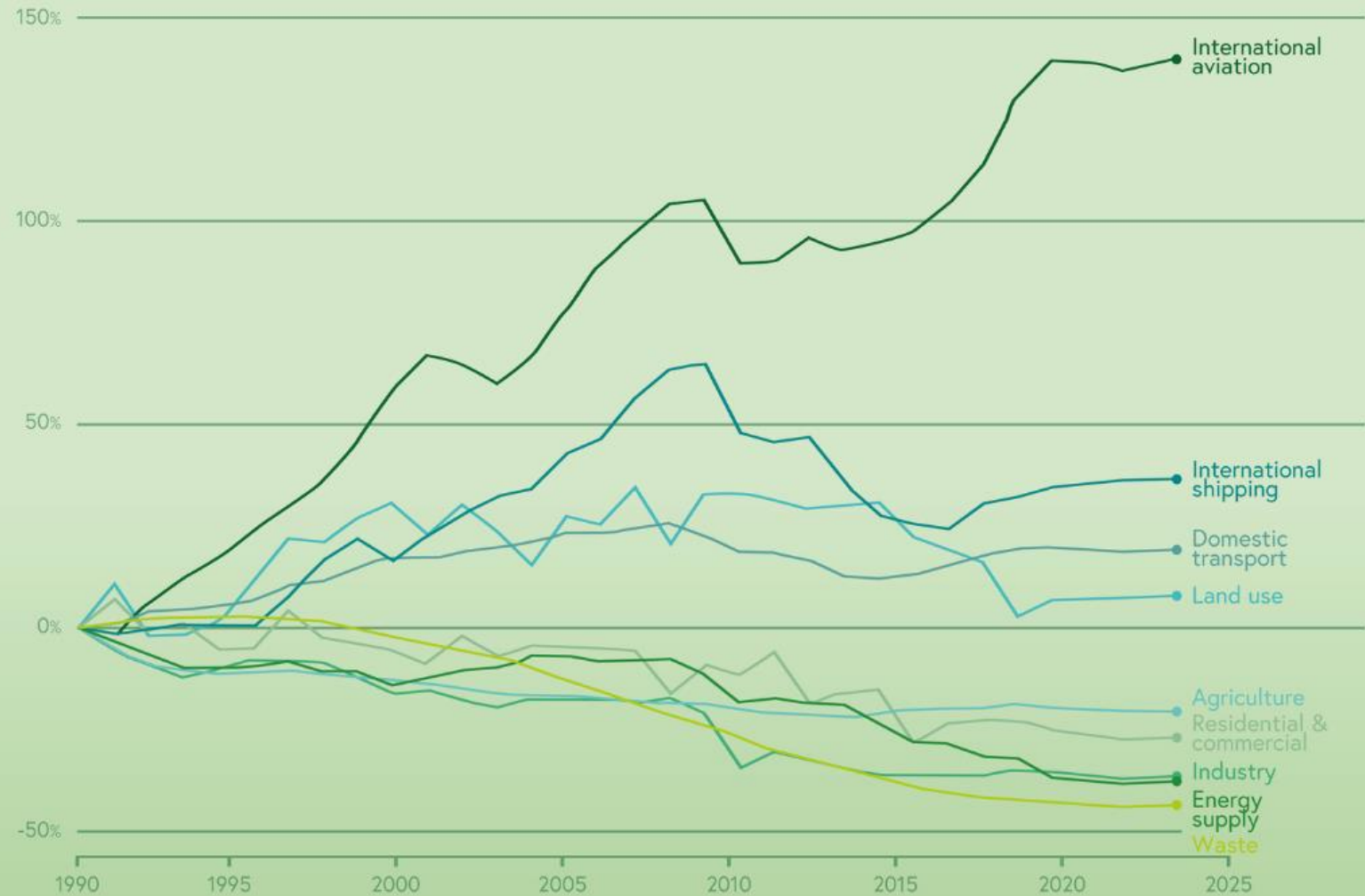


By 2042, the global aircraft fleet will be ~50% larger,  
growing from 29,000 to 42,000+.



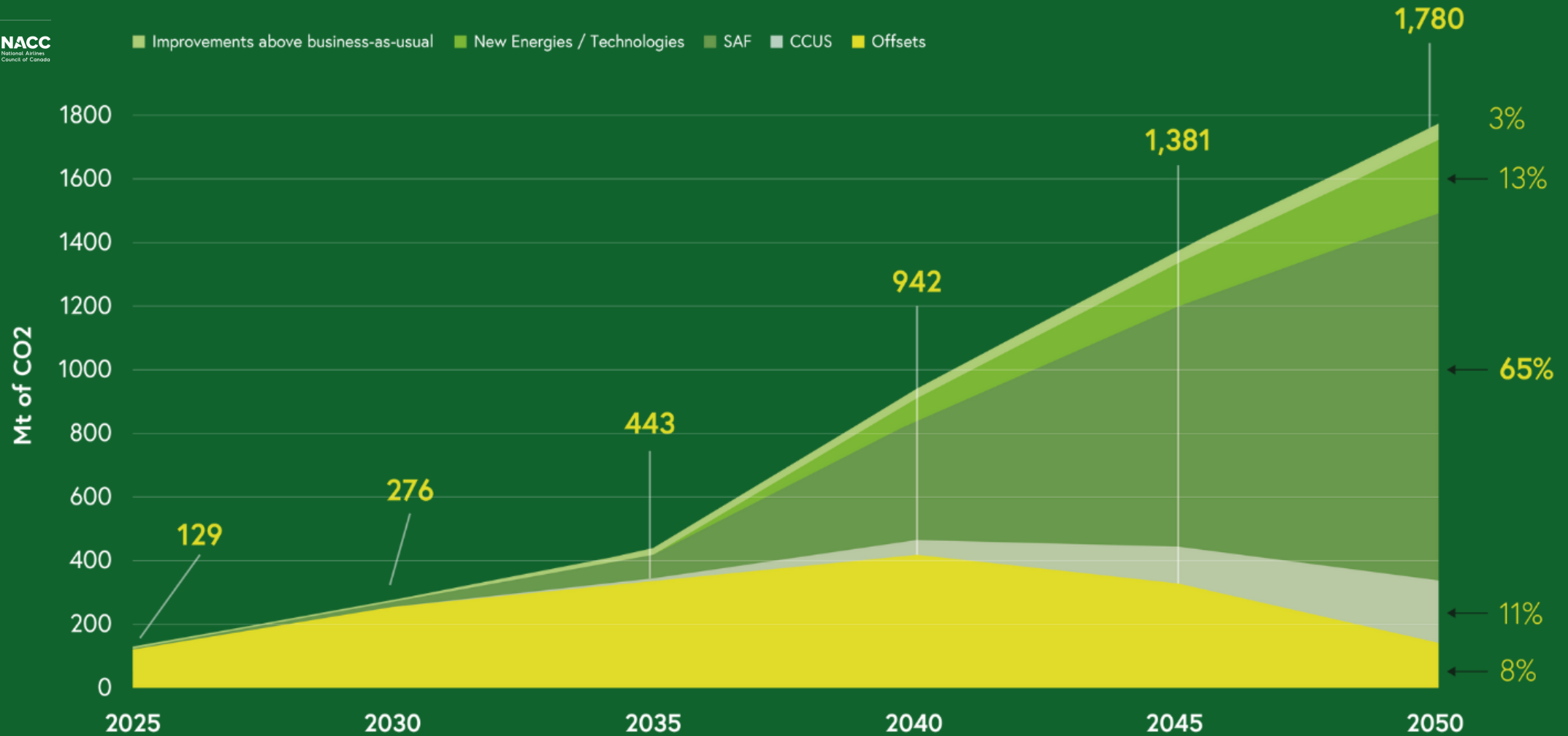
2023 2024 2025 2026 2027 2028 2029 2030 2031 2032 2033 2034 2035 2036 2037 2038 2039 2040 2041 2042 2043 2044 2045

Aviation's emissions have grown  
**dramatically** and  
**disproportionately.**





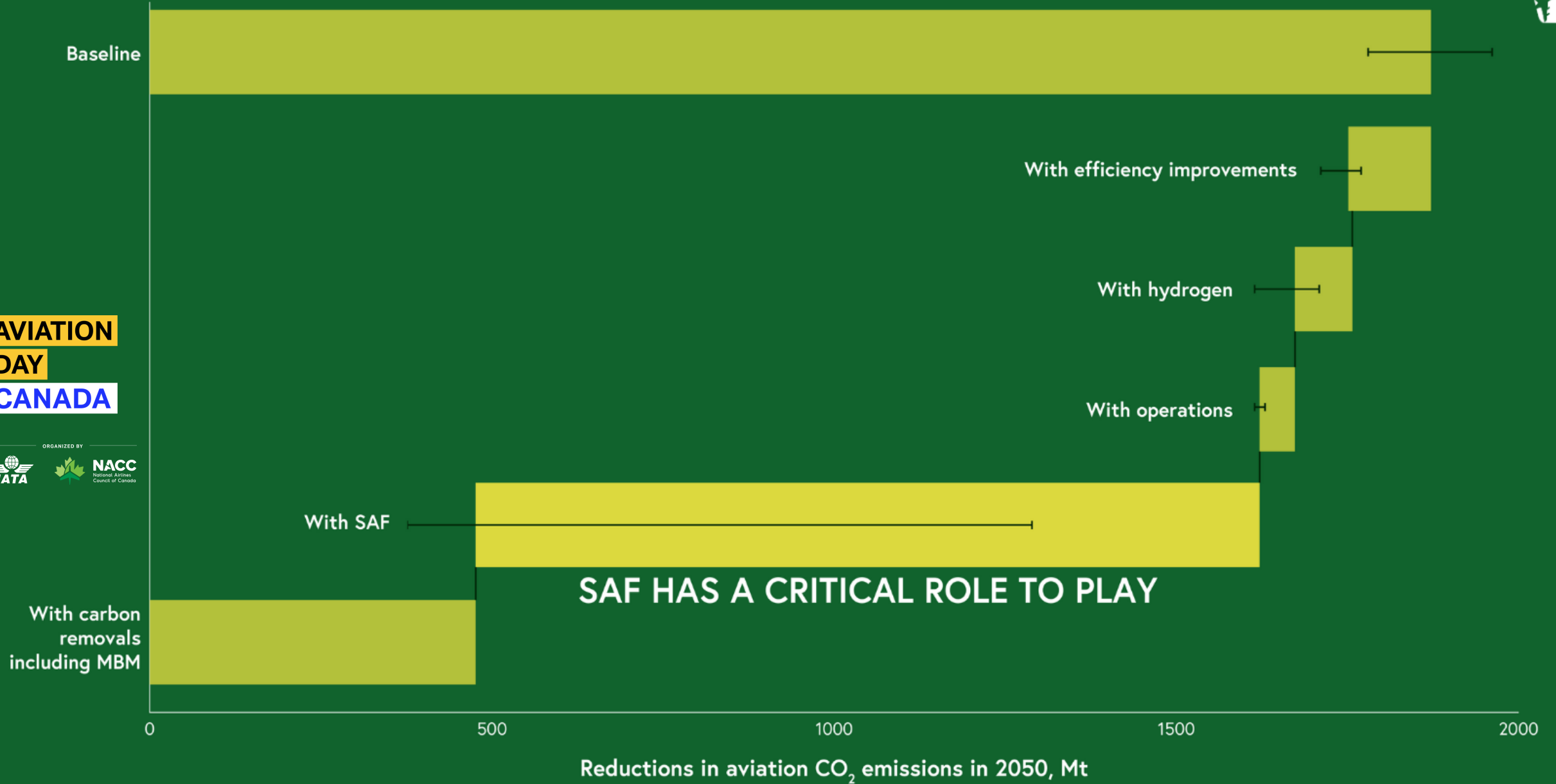
# Evolution over time





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**150 SAF**  
REFINERIES

**€250BN**  
INVESTMENT



**250 SAF**  
REFINERIES

**\$400BN**  
INVESTMENT

# 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	<b>Total</b> (both columns)		<b>20.73 Mt</b>
Canada (BC only)	10%*	.1 Mt			

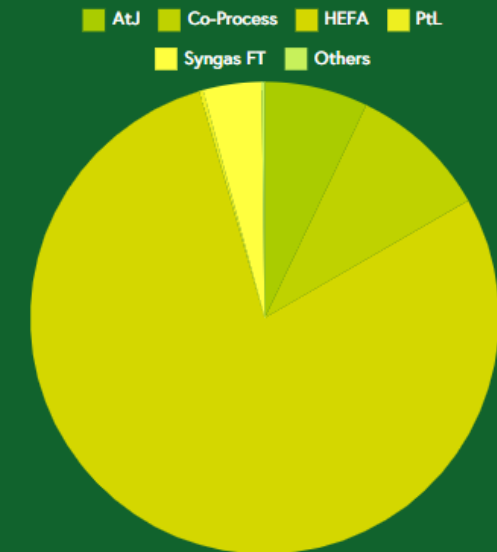
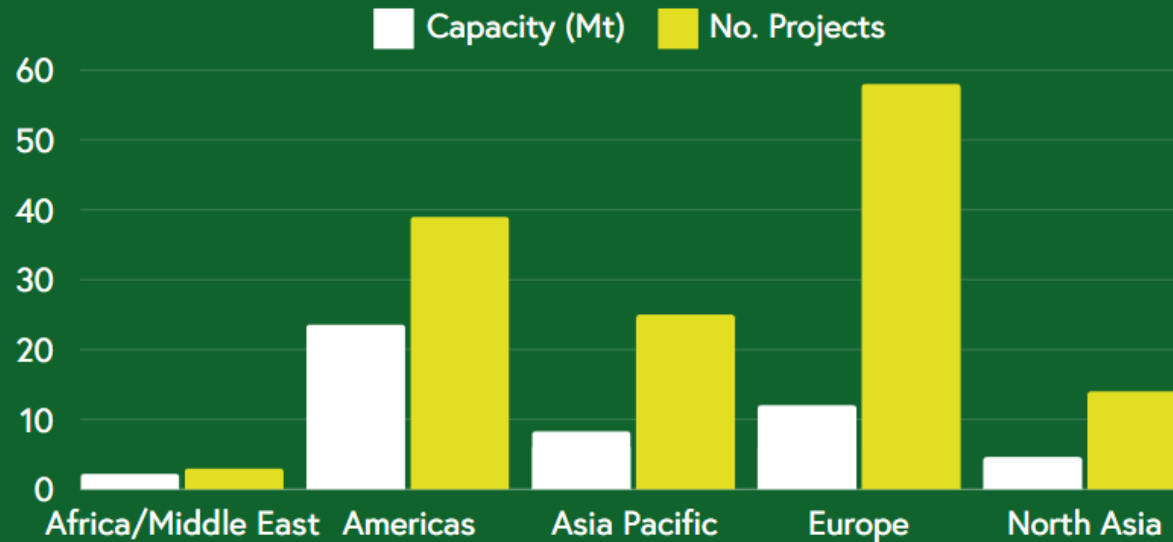


Source: atag.corg

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

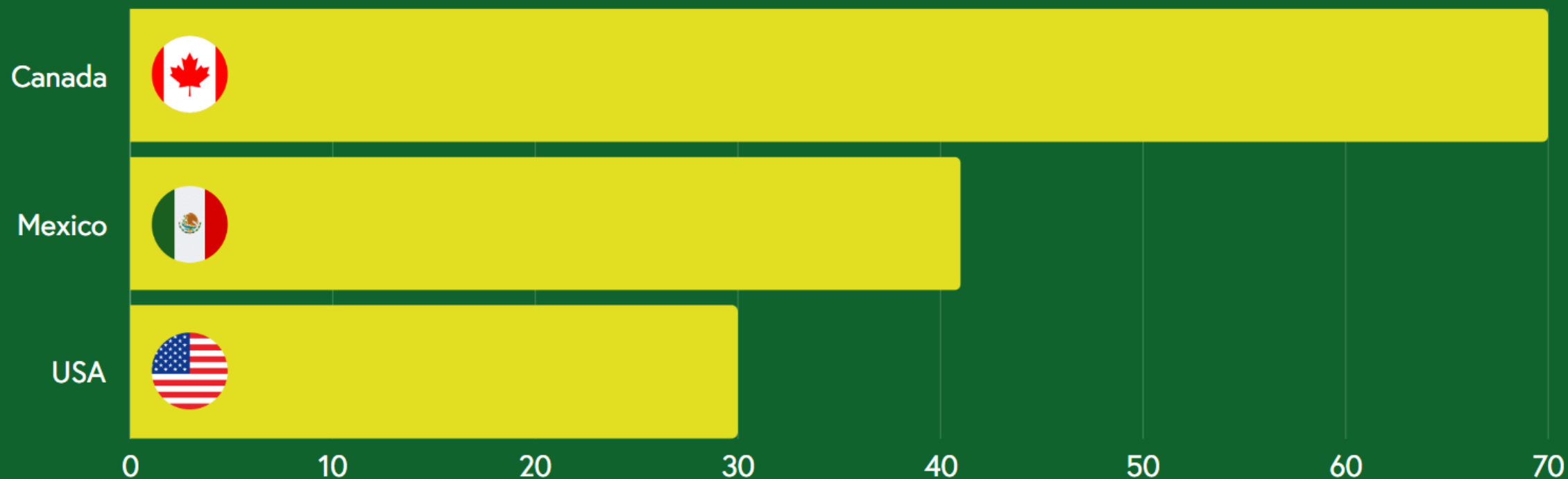


# Renewable Fuel Capacity by region & technology by 2030



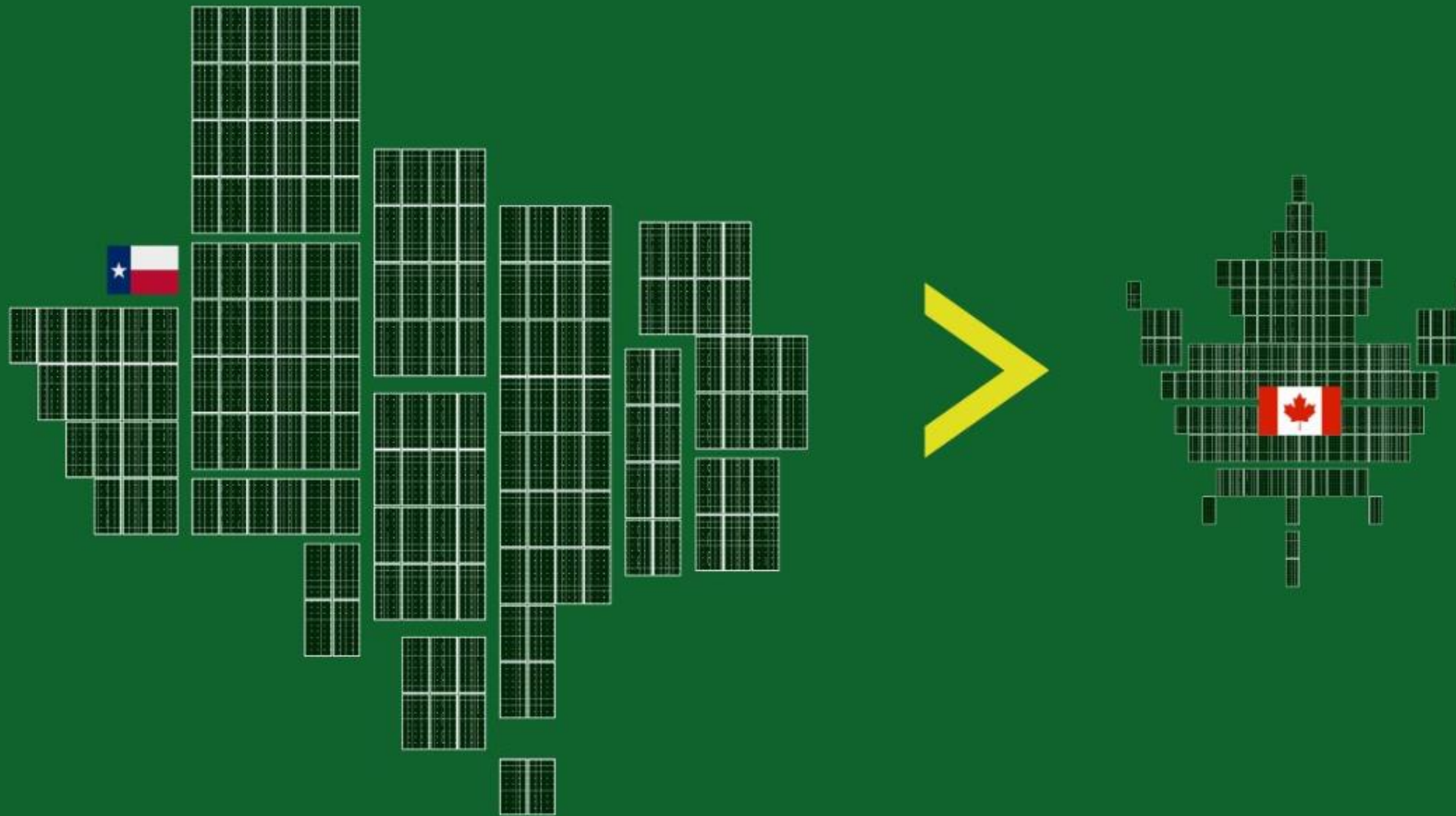
**140 identified SAF projects, 100+ producers in 31 countries - but sluggish pace of commercialization**  
**Government financing will be central to accelerate deployment of SAF technologies**  
**Feedstock diversification, technology neutrality, and robust accounting framework are essential**

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



Last 12 months

Since 1867

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# LET'S BEGIN!

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

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Head of Public Affairs  
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Representative to ICAO



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## The Passenger Journey: How Can the Canadian Air Travel Ecosystem Work Better Together to Improve Passenger Air Travel?

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# Accessibility Insights: Ensuring that every individual, regardless of ability, can access air travel in Canada

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[thespokeapp.com](https://thespokeapp.com)

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**Stephanie Cadieux**

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**Jeff Morrison**

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# Value of Aviation in Canada: The Outside Perspective

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**David De Grandpré**

Partner  
Deloitte



**Nadia MacDonald**

Executive Director  
Atlantic Canada  
Airports Association



**Stephane Albert**

ICAO Main Executive  
Representative  
Pratt & Whitney



**Nelson Camacho**

CEO North  
America  
Swissport



**Amy Butcher**

Vice President,  
Stakeholder Relations  
& Engagement,  
Tourism Industry  
Association of Canada



**Can Dizdar**

H.E.  
Turkish Ambassador  
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Vice President,  
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## Closing Remarks



**Jeff Morrison**

President & CEO  
National Airlines Council of Canada



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**Andrew Gibbons**

Vice-President, External Affairs  
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