



International Coordinating Council of Aerospace Industries Associations

Newsletter

Summer 2023

A WORD FROM OUR CHAIR



This summer edition of the ICCAIA newsletter highlights some good progress across a number of exciting initiatives, as well as look ahead to a busy fall in Montreal.

In May, the ICAO Advanced Air Mobility Study group got off the ground, with its inaugural meeting held in person in Montreal. ICCAIA will take a leadership role of this group, with Brenden Hedblom from EVE Air Mobility appointed as its Vice Chair. At the same time, ICCAIA's own internal AAM group met several times to develop and discuss our future inputs to ICAO's group, and we are encouraged by the fantastic response to our call for volunteers to

support these workstreams.

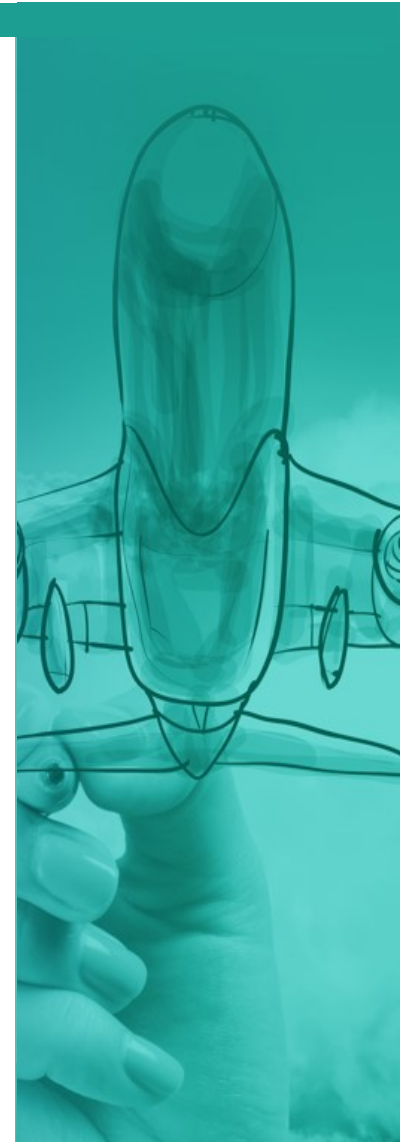
Preparations for the third conference on aviation alternative fuels (CAAF/3) meeting in Dubai in November are well underway; regional meetings and a Stocktaking concluded in July, all with significant ICCAIA manufacturer contributions. These next steps are very important, and we hope they will lead to an ambitious goal for the use of Sustainable Aviation Fuels at the Dubai meeting that gives confidence to the market to trigger a significant increase in fuel production. In turn, this will drive the whole sector towards the Long-Term Aspirational Goal (LTAG) of Net-Zero Carbon by 2050, which was agreed to last year, and bring down the cost of SAF. ICCAIA's members also played a prominent role in the Industry Consultative Forum in June, to highlight what will be needed to support electric, hydrogen and hybrid propulsion - another critical step on the path to LTAG.

The ICAO Gender Summit, held in July in Madrid, was a great success, with many ICCAIA members participating and speaking. Our breakfast workshop on the broader of issue of future workforce, held in partnership with UK DfT, IATA and ACI, provided some useful input to the launch of a new joint industry taskforce that will be created towards the end of this year.

The fall agenda is packed, kicking off with the Air Navigation Symposium (AN World) where ICCAIA's Vice Chair, Mike Mueller, will speak in the opening session. Through the balance of the year, we have ICAO's Aviation Security and Cybersecurity week in October, the CAAF/3 meeting, COP/28 meeting in Dubai, the next ICAO AAM study group, and the Drone Enable Symposium, alongside some key panels such as the Airworthiness, Instrument Flight Procedures, RPAS and Dangerous Goods. ICCAIA encourages all of our members to engage in these meetings and conferences to ensure that manufacturing and services industries are well represented.

As always, please do not hesitate to reach out if you have any questions, and I hope you are enjoying your summer.

Eric Fanning, Chair, ICCAIA
& President and Chief Executive Officer of the Aerospace Industries Association (AIA)



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FIRST MEETING OF THE ICAO ADVANCED AIR MOBILITY STUDY GROUP

By Brenden James Hedblom

Advanced Air Mobility (AAM) is one of the central and most rapidly advancing areas across the aviation industry today. However, as industry continues to accelerate, the likelihood of diverging approaches, including standards and certification increases in parallel.

The 41st Session of the ICAO Assembly recognized that the quickly evolving AAM ecosystem requires ICAO to take a central role in the development of a holistic and globally harmonized framework, and as such created the ICAO AAM Study Group. The primary objective of the AAM Study Group is to serve as a focal point in developing strategy recommendations and guidance material for AAM related work to ICAO. This includes a comprehensive assessment and gap analysis of the AAM ecosystem and the current environment including enablers to Urban Air Mobility (UAM), emerging traffic management systems facilitating tighter integration and coordination, and the supporting ground infrastructure these operations will rely on. The AAM Study Group will also coordinate with the relevant ICAO Panels to support alignment across the various initiatives.

During the first week of May, Members across 15 States and 16 International Organizations came together in Montreal for the inaugural session of the ICAO AAM Study Group. The first session focused on reviewing and aligning on the Study Group objectives, coordination within ICAO, and the formation of three complementary Working Groups (WGs) targeting key objectives put in place by the Assembly: **AAM Vision WG**, **Small UAS & UTM Guidance Material WG**, and **Exploratory WG**.



ICAO Advanced Air Mobility Study Group (AAM SG)

The Study Group will support the global alignment for the future of AAM and will rely heavily on the knowledge and needs from industry to form the integrated framework required to enable operations to scale safely. Playing a critical role in coordinating industry engagement and as a participating member to the ICAO AAM Study Group, ICCAIA created a dedicated AAM Advisory Group consisting of participating organizations to further support the ICAO initiative. Currently, 38 members across 26 organizations are contributing to ICCAIA's Advisory Group to ensure the perspectives and needs of industry are well represented and captured across the ICAO AAM Study Group.

ICCAIA & IATA WELCOME ICAO ADVANCED AIR MOBILITY STUDY GROUP



Brenden Hedblom, Vice Chair (ICCAIA)
Kirsten Riensema, Chair (UK CAA),
Ruby Sayyed (IATA), Nina Brooks (ICCAIA)

ICCAIA and IATA were pleased to host an informal reception to welcome members of the newly formed ICAO Advanced Air Mobility (AAM) Study Group on May 1st 2023 in Montreal.

The new group provides an important opportunity to exchange experiences, information, and best practice on this exciting new area. We look forward to achieving alignment at a global level to enable scaling of the trials and operations that we've already seen.

Our congratulations as well to Brenden Hedblom from EVE Air Mobility who has been elected Vice-Chair and is also leading ICCAIA's own AAM advisory group.

ICAO GLOBAL AVIATION GENDER SUMMIT SUCCESSFUL OUTCOMES

The ICAO Global Aviation Gender Summit in Madrid resulted in a “Call to Action” that comprises several clear and actionable steps and strategies towards resolving the aviation sector’s very significant gender equality challenges. The Call to Action was presented by the President of the ICAO Council, Salvatore Sciacchitano. Priorities included the development of better data, which was recognized as being key to strengthening strategic foresight to support the identification of trends, anticipated needs, and planning, and accordingly to informed policy and decision making.

The Summit was well attended, with a broad range of stakeholders participating including aircraft and engine manufacturers. Nina Brooks from ICCAIA spoke at the closing panel of the summit and also co-hosted a breakfast workshop addressing workforce issues more broadly, with the UK Department for Transport, ACI and IATA.



Breakfast Workshop with over 70 attendees

Global Aerospace and Aviation Skills Taskforce

The outcomes from the workshop will help to inform the direction of a new taskforce on workforce being created with likeminded states and industry representatives.

Building on existing domestic programmes and international work, the taskforce, being created by UK Department for Transport, ACI, IATA and ICCAIA, will focus on workforce challenges with a primary objective of supporting ICAO in achieving its objectives, but also more broadly on addressing future aviation skills.

Workforce shortages faced by the global aviation and aerospace industry, and expected changes to the sector will be considered to ensure that the industry is appropriately prepared to face future demand.



Taskforce Group

The challenges to be addressed include improving the perception of the sector, upskilling for new and expanding technologies, outreach to young people, promoting equality and creating sustainable career pathways.

The taskforce will seek to contribute to the work of ICAO through the 42nd General Assembly in 2025 and the newly re-vamped NGAP program.

We have already received a great deal of support from over a hundred potential participants and expect the first full meeting of the task force to take place in early 2024.

ICNSS TASK FORCE

By Claude Pichavant

Integrated Communication, Navigation, Surveillance and Spectrum (ICNSS) was a key subject at the 41st ICAO Assembly, presented in several working papers. The Assembly welcomed and endorsed the work of the ICNSS task force, noting the ultimate objective of the ICNSS project being to propose a set of recommendations for endorsement by the next Assembly.

The ICNSS Task Force main tasks are:

- Prepare CNS and Spectrum Roadmaps for the medium and longer term, leveraging recent advances in the state-of-the art of CNS technologies.
- Propose a Standardization Framework for CNS Systems and Spectrum which includes the definition of a new approach for the development of Standards and Recommended Practices (SARPs) and Global Technical Specifications, by leveraging a more performance-based approach.

After a pause due to the COVID-19 crisis, significant growth in air traffic is now being seen, with a 3,5% average annual growth rate. Also considering the fast progress of new entrants, legacy CNS infrastructure is reaching limits in terms of capacity and performance. This requires the aeronautical industry to embrace new technologies that offer increasing CNS system performance, capacity and efficiency.

As the technology is advancing at a pace that exceeds the ability of the aviation community to develop applicable aviation CNS standards within an appropriate timeframe, the need to streamline the standardization process within

ICAO and industry with the help of the industry is key.

ICCAIA, through its various members, is well engaged and represented in this Task Force.

Despite the difficult time faced during the COVID-19 crisis, ICNSS Task Force conducted 41 virtual meetings between 2020 and 2022, progressed the base work and finally, started its face-to-face meetings in 2023. This year, ICNSS Task Force already conducted three face-to-face meetings, which resulted in excellent progress in the work.

With their active participation and close collaboration among members, the Task Force is expected to complete the development of deliverables by the middle of next year, for presentation to the ICAO Air Navigation Commission.

During the past few meetings, ICNSS Task Force also started its review of Assembly Resolutions in force and recognized that there might be a need to for amendments to resolutions related to the standardization and evolution of CNS systems and their related use of spectrum. The ICNSS Task Force will continue their discussion on this point, and this will likely result in proposals to be presented for the next upcoming ICAO Assembly.

Thanks to the work of this ICNSS Task Force, it is clear the ICAO inter-panel coordination process including cooperative activities between panels is a key factor to make the standardization process quicker and more efficient.

The effective collaboration with other Standard Making Organisations such RTCA, Eurocae, AEEC, SAE, ETSI, etc. is also paramount in this project.

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



Dan Carnelly



Nina Brooks



Sandrine Kanakri

THIRD MEETING OF THE INDUSTRY CONSULTATIVE FORUM (ICF)

The third meeting of the Industry Consultative Forum (ICF3) saw significant senior-level presence by ICCAIA manufacturers across four sessions held on 12th and 13th June. Following on from the strategic themes identified in the first ICF and building on the work of the second ICF that examined the requirements for SAF, the ICF3 examined the alternative propulsion systems that will be needed to revolutionise aerospace to achieve the 2050 Net Zero goal.

Representatives of Airbus, ATR, Embraer, Rolls-Royce, Pratt and Whitney, ZeroAvia, Universal Hydrogen and Eviation joined representatives of airports and airlines to discuss what will be needed to bring electric, hybrid and hydrogen propulsion to the marketplace. All of the stakeholders gave an overview of their various programs, with some companies identifying that they had stakes in multiple areas. Council Members posed questions around what will be needed to energise the transformation, with some posing questions about ensuring accessibility for developing countries. With respect to the production of the energy, be it electricity or hydrogen, the industry expressed the need to ensure that the generation or production was also clean, utilising renewables. Finally, one consistent ask of ICAO emerged from each of the groups – please make sure that there you develop regulatory framework that enables the technologies to come to market in a timely way; there is no time to lose. Work needs to start now. This message is consistent with the ICCAIA White Paper presented by Eric Fanning to the ICAO Council in March and on which, as a result, extensive work has been triggered across ICAO.

ICCAIA TO JOIN THE COMPLETE AIR TRAFFIC SYSTEM (CATS) GLOBAL COUNCIL

The CATS Global Council is an independent innovation forum, initiated by CANSO, to facilitate greater collaboration among leaders across the aviation and aerospace industries: ANSPs, UTM service providers, aircraft manufacturers, drone operators and manufacturers, high-tech companies, airlines, airports, regulatory authorities, space agencies and research bodies. It has developed a vision and roadmap for the creation of a future global airspace that is safe, fair, intelligent and interoperable, leveraging revolutionised design, technology and services to power global mobility and prosperity.

ICCAIA will officially become a member of the Council this fall, and is looking forward to contributing to this vital work.

ABOUT THE INDUSTRY CONSULTATIVE FORUM (ICF)

The Industry Consultative Forum, or ICF, is an approximately annual virtual meeting hosted by the ICAO President and Secretary General that aims to foster dialogue between senior civil aviation sector representatives and the ICAO Council.

The format brings together small round-table groups of five or six stakeholders, including airframe and engine manufacturers, airlines, airports, ANSPs, academia, fuel and energy producers, focusing on a subject of importance to the industry. Each person is invited to speak about the importance of the subject to their company and signal to ICAO what they believe ICAO's role is in that subject area. Council members then pose their questions in a dialogue.

Previous sessions have been a high-level overview of strategic priorities, followed by a second ICF on Sustainable Aviation Fuels. The next ICF, to be held in early 2024, will focus on the issue of Cyber Security.

ICCAIA EXPANSION PROGRAM

Increased participation of ICCAIA at both ICAO and other global fora, coupled with an expanded work program has generated expectations from ICAO and opportunities for manufacturers that demands the creation of an expanded, more structured team. In March this year, ICCAIA's Board of Directors gave its support for progressing the program. As an accredited International Organization, ICCAIA is also recognized for the value it brings to Quebec and Canada, making it eligible for application for government subsidies to help fund an expansion.

We are pleased to have started the recruitment process for the first of five new positions to be filled over the next three years. We will be recruiting two new directors, one to focus on Airworthiness and CNS/ATM, and the other on Environment, Security and Facilitation. These will be supplemented by a more junior position to assist across all subjects, and a manager responsible for marketing, communications and membership. With this structure in place, ICCAIA will be able to better support its Committee Chairs and panel members, participate in all required meetings and events and ensure an organized regional presence.

As the expansion program progresses we will provide updates through this newsletter and via our website. This is an exciting time!

ICAO COUNCIL VISIT TO PRATT & WHITNEY

By Dan Carnelly



Continuing direct engagement with aerospace manufacturers local to the Montreal area, the ICAO Council visited the Longueuil production facilities of Pratt & Whitney Canada on May 17th. This visit follows on the heels of a visit to Airbus' Mirabel facility and is designed to enable Council members to visualise the equipment for which ICAO designs standards, while facilitating a direct exchange with industry leadership on the main points of concern for the sector in the coming years.



After an introduction to both Pratt & Whitney and Pratt & Whitney Canada, and their various engine products, Council members received a guided tour of the machine shops and production lines in the plant. Senior Executives went on to present Pratt & Whitney's vision for Sustainable Aviation Fuel (SAF) usage and the technological development already ongoing for design, test and production of alternative forms of propulsion – a subject closely aligned with the third Industry Consultative Forum (ICF3) discussions – before entering into a Q&A that allowed the company to express industry's asks of the ICAO Council.

Pratt & Whitney reiterated industry's commitment to a Net Zero 2050 goal and helped the Council to understand how ICAO's activities can be leveraged to help ensure SAF availability whilst also keeping an eye on the longer term technology roadmap to enable electric, hybrid and hydrogen propulsion to come to market in the future.





MEET SJAC'S PRESIDENT

Mr. Takumi Fujino

Mr. Takumi Fujino, President of the Society of Japanese Aerospace Companies - SJAC - is ICCAIA's Second Vice-Chair. He accepted our interview and we are happy to share with you hereafter his answers.

Q. How would you describe yourself? How would your team describe you?

A. I personally describe myself as an idealist and in a sense a dreamer. However, my team seems to describe me as a realist. It seems that my previous assignment, a government official, gives such an image of me.

Q. What attracted you to aviation/aerospace? What are you most passionate about?

A. Flying, both aviation and aerospace gives a lot of attraction and/or dreams to people. Furthermore, practically speaking, only aviation can provide the access to the connection all over the world, which would be the basement of the world prosperity. I am proud that I can serve for such an important function human being has.

Q. What, in your view, is the biggest challenge facing aviation right now?

My personal view on the biggest challenge is, as most people so think, the environment challenge. Industries all over the world should contribute to minimize the bad effect on environment by reducing the emission of green-house gas. But at the same time, the role of the aviation

as one of the key means of transportation and the prosperity, must be secured. Without passengers or cargoes due to much high cost, no innovation could continue. Balancing between the enhancement of innovation by R/D and the application of such innovation in such a manner that could keep the role of the aviation would be the most challenging issue, I believe.

Q. What excites you about the future of aviation?

A. I believe aviation continues to be one of the key infrastructures of world-wide prosperity, innovation on this sector should keep updating. Although we have IT technologies which already provide us "the world without the limit of time and space," we still can find the necessity of it in a real world. Super-sonic aircrafts, for example, could overcome such limitations.

Q. What are you looking forward to the most in the next year?

A. Japan International Aerospace Exhibition 2024 will be held on 16-19 October next year at Tokyo Big-Site in Tokyo. We welcome your participation in the exhibition and would like to see you in Tokyo!



The Society of Japanese Aerospace Companies

About SJAC

Founded in 1952 as private forum for aircraft industrialists, the Society of Japanese Aerospace Companies (SJAC) was reorganized in 1974 and has since grown steadily as the sole public entity representing the interests of the Japanese aerospace industry. SJAC joined ICCAIA in 1972 and has been actively participating since.

SJAC's 130 member companies are engaged in manufacturing, repairing and trading of aircraft, satellite, launch vehicle and related equipment in Japan.

For more details, please visit www.sjac.or.jp.

EVENTS CALENDAR – AUGUST / DECEMBER 2023

Dates	Meeting	Place
21-24 August 2023	Twenty-Eighth Meeting of the Regional Airspace Safety Monitoring Advisory Group	ICAO-Bangkok
28-31 August 2023	Air Navigation World	ICAO HQ
05-08 Sept. 2023	4th Meeting of the Aviation Data and Analysis Panel	ICAO HQ
12-14 Sept. 2023	DRONE ENABLE/ Remotely Piloted Aircraft Systems (RPAS)	ICAO-Brazil
12-14 Sept. 2023	Traveller Identification Programme (TRIP) 2023	ICAO HQ
18-29 Sept. 2023	5th meeting of the Surveillance Panel	ICAO HQ
18-29 Sept. 2023	16th meeting of the Instrument Flight Procedures Panel	ICAO HQ
19-21 Sept. 2023	14th meeting of the Flight Recorder Specific Working Group	ICAO HQ
25-26 Sept. 2023	ICAO pre-CAAF/3 (pre-third Conference on Aviation and Alternative Fuels) Outcomes Consultation	ICAO HQ
02-06 October 2023	Eleventh Meeting of the Air Traffic Management Sub-Group of APANPIRG	ICAO-Singapore
09-10 October 2023	EUR/NAT VOLCEX23 Preparatory Workshop	ICAO-Reykjavik
10-12 October 2023	ICAO/EASA Second Forum on Regional Safety Oversight Organizations (RSOOs) for Global Aviation Safety	ICAO-Nairobi
11-13 October 2023	4th Meeting of the Technical Advisory Group on the Traveller Identification Programme	ICAO HQ
16-20 October 2023	Committee on Aviation Environmental Protection Steering Group Meeting	ICAO-Japan (TBC)
17-19 October 2023	9th Joint Meeting of the Airport Economics Panel and Air Navigation Services Economics Panel	ICAO HQ
19-20 October 2023	Global Aviation Skills Taskforce Steering Group	UK-London
23-27 October 2023	22nd meeting of the Remotely Piloted Aircraft Systems Panel	ICAO HQ
23-27 October 2023	ICAO Security Week 2023: AVSEC & CYBERSEC	ICAO HQ
23-27 October 2023	ICAO Air Navigation World 2023 – ATM Procedures for Today	ICAO-Singapore
25-27 October 2023	Civil Aviation Training Centres Working Group - North American, Central American and Caribbean Region	ICAO-Mexico City
6-10 November 2023	Twelfth meeting of the Operational Data Link Specific Working Group	ICAO HQ
13-15 November 2023	Regional Aviation Safety Group - Pan America (RASG-PA)	ICAO-Dominican Republic
13-17 November 2023	Tenth meeting of the Airworthiness Panel	ICAO HQ
13-17 November 2023	Twenty-ninth meeting of the Dangerous Goods Panel	ICAO HQ
15-17 November 2023	Air Navigation Planning and Implementation Regional Group - Caribbean and South American Region	ICAO-Dominican Republic
21-24 November 2023	Third ICAO Conference on Aviation and Alternative Fuels (CAAF/3) Meeting	ICAO HQ
30 Nov.-12 Dec. 2023	28th session of the Conference of the Parties (COP 28) to the UNFCCC	UAE
05-07 December 2023	DRONE ENABLE 2023 Symposium	ICAO HQ/Regions



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