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CARIBBEAN DEVELOPMENT AND CO-OPERATION COMMITTEE

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PROGRESS REPORT  
ON  
JOINT CEPAL/ICAO STUDY ON AIR TRANSPORT



UNITED NATIONS

ECONOMIC COMMISSION FOR LATIN AMERICA Office for the Caribbean



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MANDATE

CDCC II agreed as follows:

"With respect to air transport, the Committee endorsed the joint CEPAL/ICAO project to carry out the survey into the existing state and conditions of air transport in the CDCC area; and agreed to nominate the liaison officers and a regional committee of experts to expedite the work." (paragraph 48 of the Report of CDCC II - E/CEPAL/CDCC/21/Rev.1 -/E/CEPAL/1039/).

Part One of the study - the Data Collection Stage has now been completed and nine working papers have been produced, one on each subject specified in the original proposal (E/CEPAL/CDCC/19/Add.1).

PROGRESS

These working papers will be presented at a meeting of Regional Experts and cover the following topics:

1. The existing air routes and services connecting the main centres in the Region; scheduled and non-scheduled international air transport services for passengers and freight, operated by regional and extra-regional scheduled and non-scheduled carriers.  
This data was compiled mainly from the Official Airlines Guide.
2. A brief description of scheduled and non-scheduled carriers based in the region.  
This data has been compiled mainly from the World Airline Record.
3. A brief analysis of air traffic flows, passenger and cargo, between countries in the region and the participation in the carriage of such flows by regional airlines.  
This data has been collected on ICAO Form C : Traffic by Flight Stage.
4. The financial and economic situation of scheduled airlines and determinants of their costs.  
This data has been collected on ICAO Form F1 : Profit and Loss Statement, and Form D : Fleet and Personnel.
5. Some relevant considerations concerning the level of regular passenger fares and freight rates in regional services.  
This data has been produced from the ICAO publication - Regional Differences in Fares and Costs for International Scheduled Passenger Transport, 1976 - and further analysis by ICAO headquarters.

6. Existing conditions of air transport infrastructure (airports and air navigation facilities).

- This data has been compiled from the Air Navigation Plan for the Caribbean and South America by ICAO and by further work completed by the ICAO Mexico Office.

7. Government Policies with regard to the operation of scheduled and non-scheduled air services.

This paper looks at the existing 51 Bilateral Agreements in the region as well as supporting information compiled by ICAO in order to determine existing policies, and then makes specific recommendations for the future.

8. The development of tourist traffic in the region.

This paper looks at the growth of tourism in the region and is based on data provided to the CDCC by the individual Tourist Boards and from Official Government sources.

9. The facilitation of international air transport in the region.

This paper looks at problems with documentation of passenger and freight movements which hinder the free development of international Air Transport Trade and Tourism.

A progress meeting was held at ICAO headquarters, Montreal, in November 1977, in order to review the data that had been collected and to organize the production of the Working Papers.

PROBLEMS ENCOUNTERED

The study itself is slightly behind schedule. Difficulty was experienced in obtaining the relevant ICAO forms needed for Working Papers 3 and 4 from the regional airlines. It had been hoped to start processing of the data by October 1977, but in fact this date was extended to 31 January 1978 and renewed efforts were made to obtain the outstanding data. On that date while some additional information was obtained, the data collected amounted to about 85% of the total. Since that date, several more airlines have replied, but at the time of writing no data has yet been received from ALM, SLM and Cubana. While the data obtained is sufficient from a statistical point of view to produce a regional overview, the results will of course, be biased toward those airlines that have forwarded data.

Further efforts will be made to collect this data so that the regional picture can be completed. It should be mentioned that if any regional airline feels it would be useful for ICAO to train staff to complete the normal ICAO reporting forms so that reporting could be on an on-going basis in future, then those airlines should approach us with a request.

Governments have been asked for nominations for the Regional Group of Experts, and while several nominations have been made, they are all from the English-speaking members.

#### WORK PLAN 1978/79

It had been hoped to convene a meeting of the Regional Group of Experts prior to the Belize Session, so that the Working Papers could be evaluated and guidance given as to which areas the group wanted expanded. Due to the delay in assembling the data, this proved to be impossible and it is now proposed to circulate the Working Papers shortly, and hold the initial meeting of the Regional Group of Experts at the end of May 1978. This meeting will carry out an economic evaluation and define the alternative strategies which is Part II of the Study. Those Governments who have not yet nominated a representative to the Regional Group of Experts are asked to do so as soon as possible.

Further meetings of the Group of Experts are planned during 1978 and despite the delay experienced it is still anticipated that this Group will be able to make their recommendations to the CDCC IV as originally proposed.

