

国際線の再開に向けて Restarting Aviation

第3回航空イノベーション
推進官民連絡会

2021年4月12日

IATA 藤原勇二



2019年世界の航空関連産業の雇用・経済効果

The global air transport industry -2019:

87.7 million

Jobs supported by aviation

worldwide 8770万人の雇用

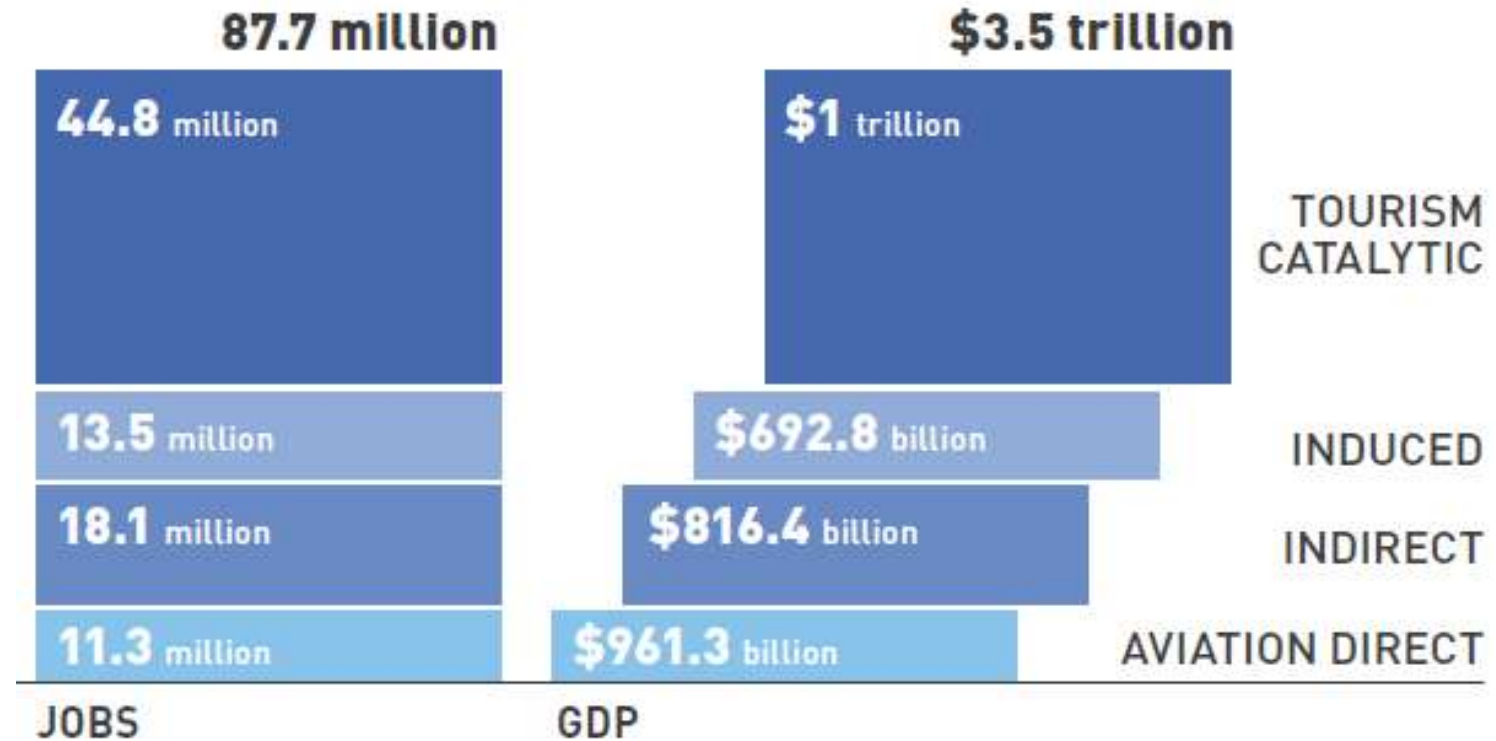
\$3.5 trillion

Aviation's global economic impact
(including direct, indirect, induced and tourism catalytic)

約370兆円の経済効果

4.1%

Global GDP supported by aviation



2019年日本の航空関連産業の雇用・経済効果

The Japan air transport industry -2019:

1.8 million

Jobs supported by aviation Japan
180万人の雇用

¥11.3 trillion

Aviation's Japan economic impact
(including direct, indirect, induced and
tourism catalytic)

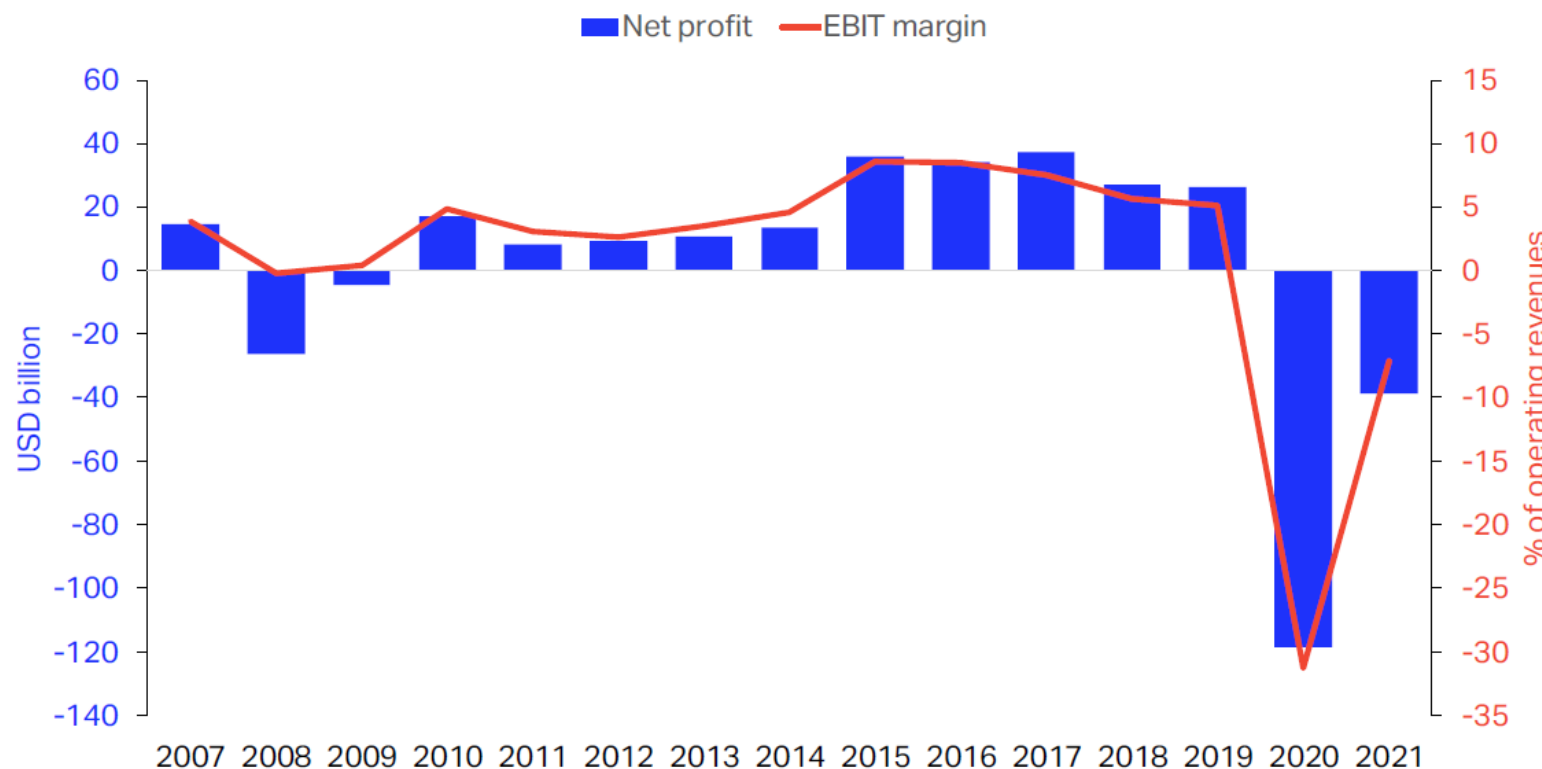
約11.3兆円の経済効果

コロナ禍
雇用の危機
経済効果の消失

2007-2021年の業界収益の推移と見通し



Losses forecast to be reduced to USD38bn in 2021
That's after an estimated USD118bn in 2020 but still exceeds GFC loss



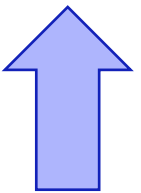
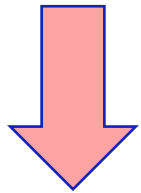
- 2008年GFC
リーマンショック
Industry Loss USD25B
(約2兆7500億円)
- 2020年COVID19
Industry Loss USD118B
(約13兆円)
- 2021年赤字
Industry Loss USD38B
(4兆1800億円)
リーマンより2年連続悪い

USD1=JPY110で換算



2021 Updates 2021年これまでの状況

| Developments社会状況 | Aviation 航空業界 |
|---|---|
| Fear about new variant 変異種 | Border restrictions worsened 国際線制限強化する国 |
| Worsening domestic COVID situation 感染状況悪化の国 | Closure, Additional Test 国境閉鎖・検査の追加等 |
| Vaccinations started and has been in progress ワクチン接種の開始と促進 | Recovery in some Countries Reopen the borders 航空需要回復、国境再開の国 |
| Positive on vaccine efficacy ワクチンの有効性 | Awareness of Digital Certificate デジタル証明書の重要性 |

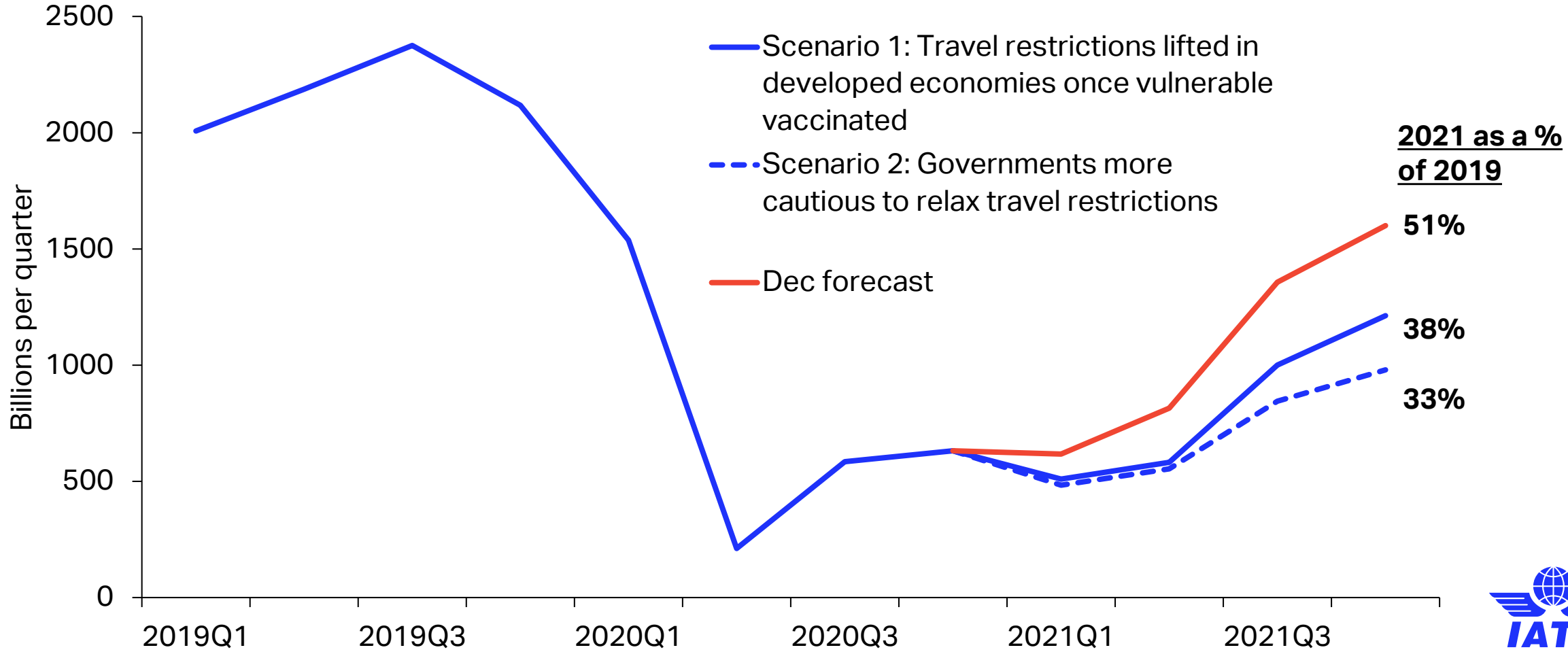


2021 H1 will be weaker than expected in December

There is also a risk to H2 from policy response to new virus variants

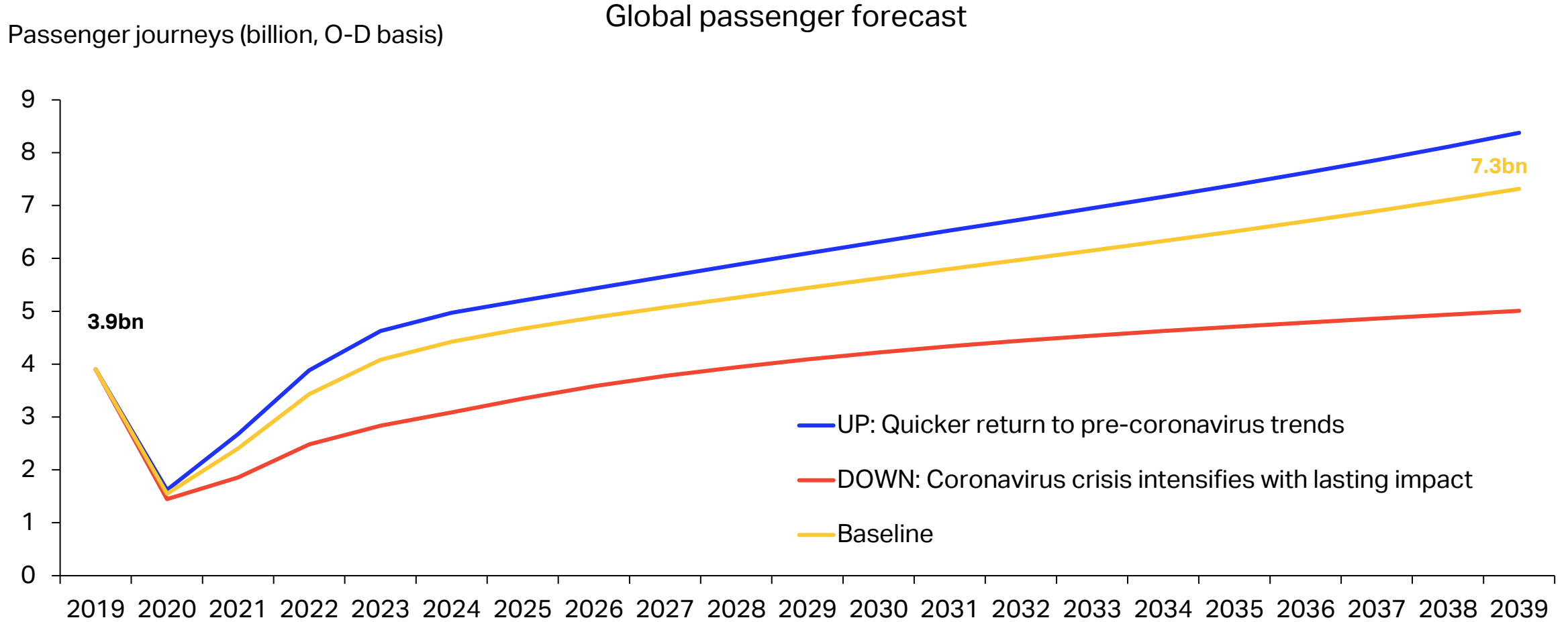
1-6月は厳しい状況が継続、通年では2019年比33-38%しか戻らない可能性

Global RPKs, billions per quarter



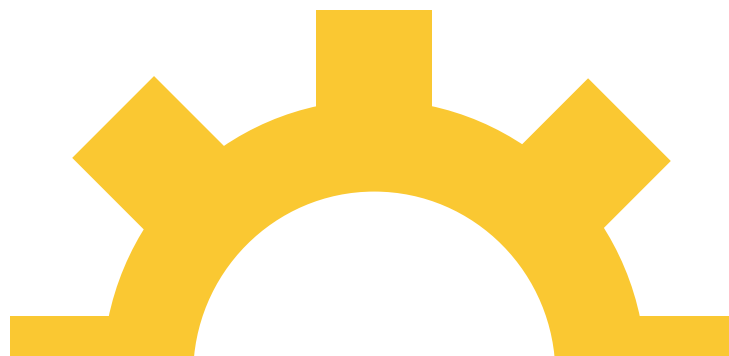
Air travel demand to rise above 7bn in the next 20 years

航空業界は今後20年間でほぼ倍増する成長産業



Source: IATA/Tourism Economics, Air Passenger Forecasts October 2020

IATA Travel Pass



The challenges 課題

Passengers 旅客

Need accurate information on test requirements, where they can get tested or vaccinated, and the means to securely convey test information to airlines and border authorities

検査要件、検査またはワクチン接種を受けることができる機関、検査結果の航空会社や政府機関への提出に関する正確な情報の必要性

Airlines 航空会社

Need to have the ability to provide accurate information to their passengers on test requirements and verify that a passenger meets the requirements for travel

検査要件について旅客に正確な情報を提供し、要件を満たしていることを確認

Governments 政府

Need to be able to verify the authenticity of tests and the identity of those presenting the test certificates

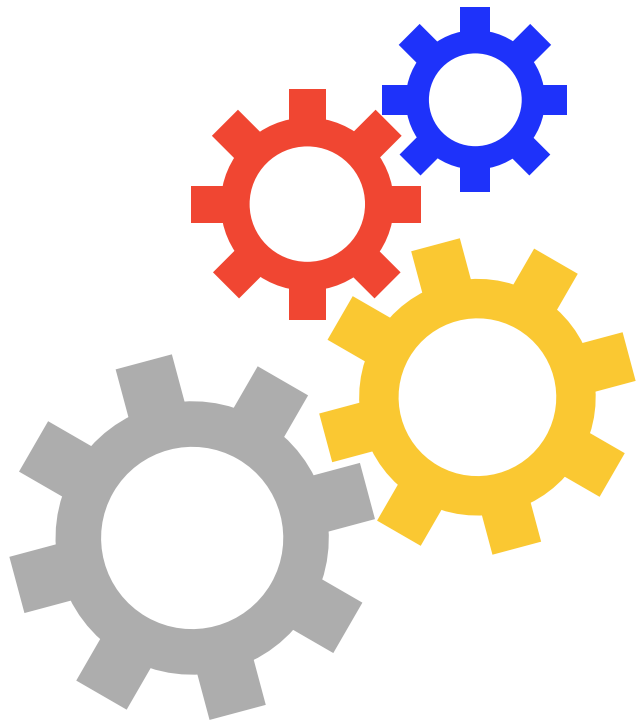
検査結果の信憑性と検査証明書を提示する人物照合

Laboratories 医療機関

Need to be able to issue certificates that will be recognized by governments

相手国政府に承認される証明書の発行

Solution 課題解決ツールのIATAトラベルパス



To address these challenges
IATA is launching:



...a combination of modules that are
interoperable and open access

Test, Vaccines and Air Travel

Vaccine Rollout is good news, Waiting for vaccine before reopening borders not an option

ワクチン接種開始は業界にとって朗報。一方で国境再開はワクチン接種がいきわたるまでは待ってられません

- Global vaccine roll-out is likely to take at least 12-24 months ワクチンの世界的展開は12-24ヶ月必要と思われます
- Implementing testing is the bridge solution – critical for industry survival
検査が当面の解決であり、航空業界の存続に必要です

IATA is NOT asking for vaccination to be a requirement.

IATAはワクチン接種を入国要件とすることを求めています。

- practicality, we are preparing for governments to use a combination of testing and vaccination to re-open borders. ワクチン接種を受けられない、ワクチン接種を受けない方々の存在を認識

Test, Vaccines and Air Travel

We need a digital solution to manage health requirements.

Common standards are needed to document both tests and vaccines.

デジタル化の必要性とグローバルスタンダードの必要性

- Paper can be a back-up. 紙はバックアップ

IATA call on governments to ensure that employees in the aviation sector are considered as essential workers during the impending COVID-19 vaccine campaign, once health care workers and vulnerable groups have been protected.

航空従事者をエッセンシャルワーカーと位置づけた接種計画

(医療従事者・高齢者・基礎疾患のある方の次にエッセンシャルワーカーとしての優先順位)

- WHOのワクチン接種ガイダンスの尊重
- 3月18日現在航空従事者への優先接種方針を発表した国・地域

USA (some states)

Brazil

Israel

UAE

Australia

Bangladesh

China

Fiji

India (some states)

Indonesia

Maldives

New Zealand

Pakistan

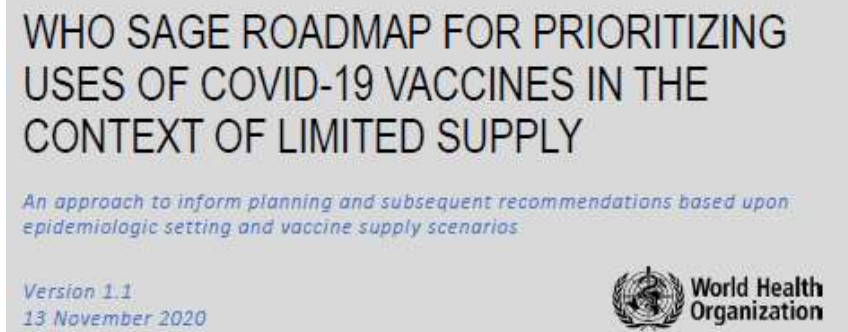
Philippines

Singapore

Sri Lanka

Thailand

Vietnam

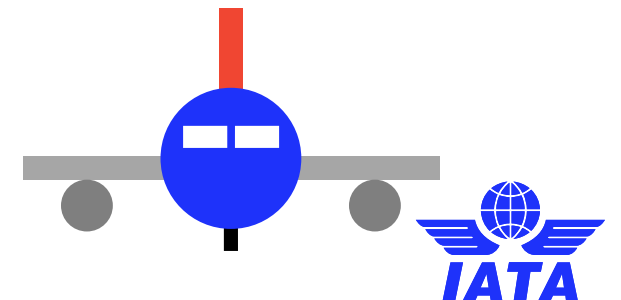


IATA Travel Pass principles

理念

- **Proven:** based on existing IATA solutions
- 従来から推奨している
Off-Airport, Fast Travel, OneID
空港混雑緩和
- **Sustainable:** additional data-sets required for travel can be easily integrated into app
- コロナ後も利用可能
他の情報が必要になった場合、統合できる柔軟性
- **Interoperable:** open standards and open networks
- 相互運用
オープンスターダートによる
航空会社・空港・他団体
等他アプリとの統合

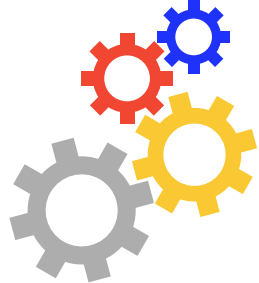
One iD



IATA Travel Pass principles

Modular and interoperable with:

- Other COVID-19 solutions
- Existing airline and industry solutions
- airlines can choose modules supporting their strategy
- モジュール毎の展開
- 既に実施済みのモジュールとの組合せ



Based on standards:

- ICAO Digital Travel Credential
- World Wide Web Consortium(W3C) – Digital Comms

グローバルスタンダードの採用

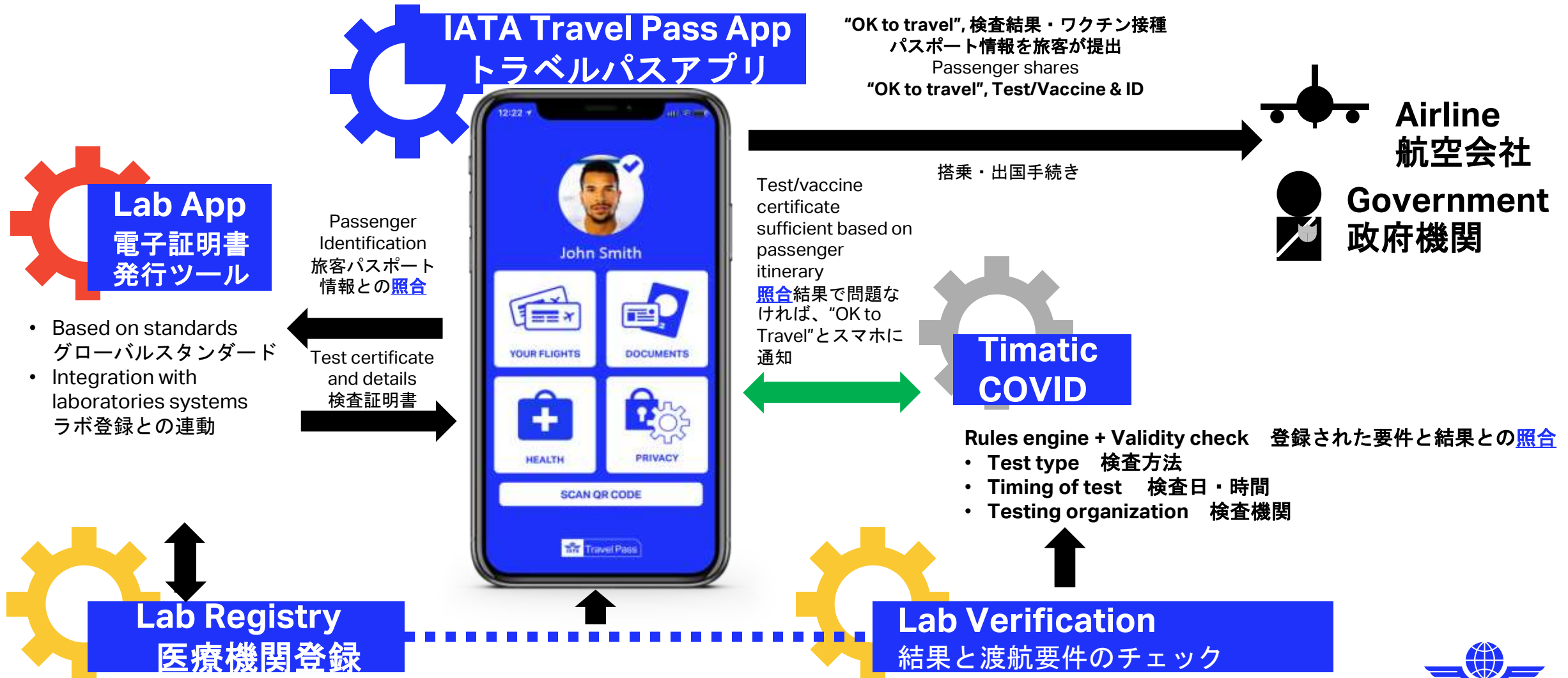


理念

- **Data privacy and security**
Decentralized: there is **no** central database holding passenger information. Passengers have the **sole right** share to their data. Users can delete their data anytime on their app.
- 集中管理を行わず、個人情報保護に留意
- データの所有は個人のみ



Overview 全体図



IATA Travel Pass @ Home (Any Time Before Travel)

出発前の自宅での作業（いつでも可能）



Create Digital Travel Credential **パスポート情報の取込**

Photo Verified
自撮り



Data Captured
パスポート情報読込



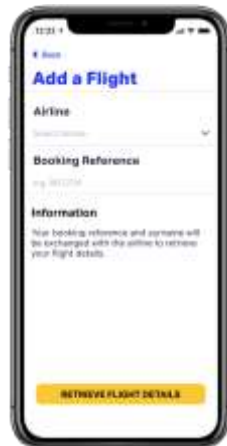
ID Verified
パスポートICチップの
写真と照合



Verified Digital Identity on Mobile

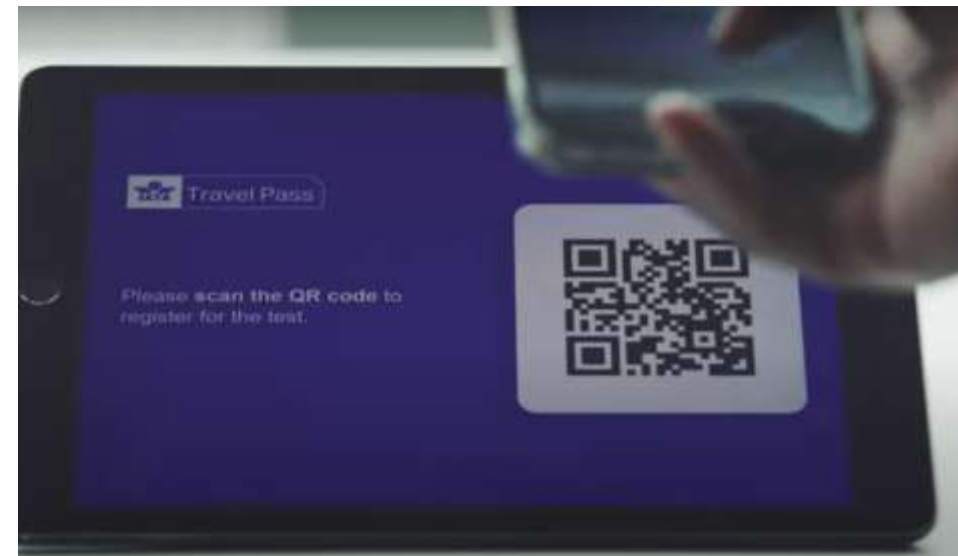
照合されたパスポート情報のスマホへの取り込み

Check Travel Requirements for the destination. **目的地の健康要件のチェック**



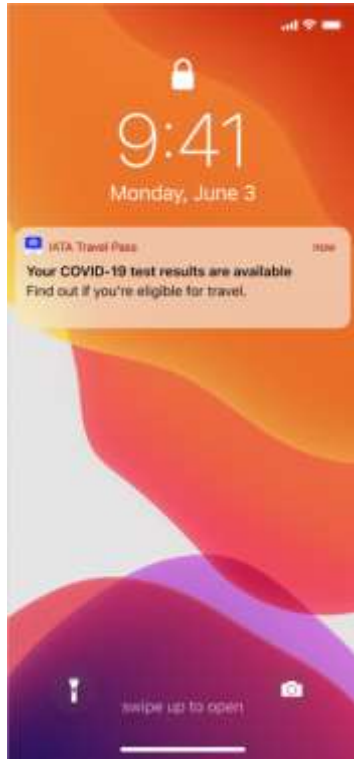
IATA Travel Pass @ Medical Institution

医療機関での電子証明書発行

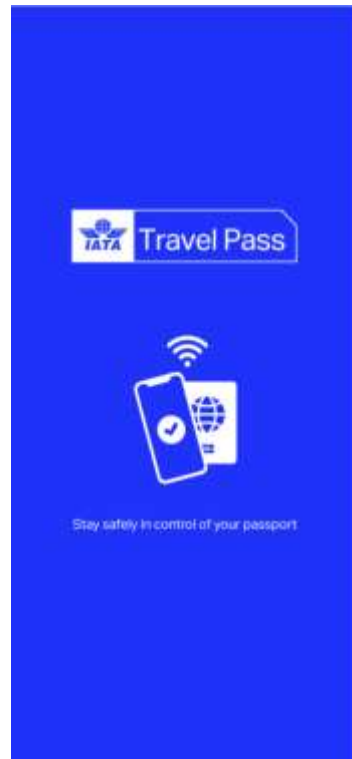


Traveler receives the result

医療機関のデジタル証明書発行後の旅行者のスマホ画面



通知表示
Notification
Pop-up



アプリを開く
Open IATA
Travel Pass



OK to
Travel



NOT OK
to Travel 

IATA Travel Pass @ Airport

空港での活用



Traveler:

Present test result at departure check-in counter and/or the authorities at the arrival airport

出国：空港チェックインに利用

入国：各国入国手続きに提示



Singapore Government accepts IATA Travel Pass from 1 May

シンガポール政府が5月1日よりIATAトラベルパスを受け入れ

<https://www.iata.org/en/pressroom/pr/2021-04-06-01/>

Date: 6 April 2021



Singapore Accepts IATA Travel Pass



Geneva – The International Air Transport Association (IATA) welcomed Singapore's acceptance of pre-departure COVID-19 PCR test results on the IATA Travel Pass.

From 1 May 2021, passengers traveling to Singapore will be able to use IATA Travel Pass to share their pre-departure COVID-19 PCR test results upon check-in with their airline, as well as on-arrival at the immigration checkpoints at Changi Airport. This is part of an ongoing collaboration between the Civil Aviation Authority of Singapore (CAAS) and IATA to

facilitate seamless and efficient travel through digital certificates of COVID-19 tests.

IATA Travel Pass Status Update as of 7 April

<https://www.iata.org/en/programs/passenger/travel-pass/>

Announcement
発表

Singapore Gov Acceptance
シンガポール政府取扱開始



1st Pilot

A collection of airline logos arranged in a grid. The logos include: Singapore Airlines, IAG International Airlines Group, Copa Airlines, ANA, JAL Japan Airlines, Qatar Airways, Emirates, Etihad, Malaysia Airlines, RwandAir, Air New Zealand, Qantas, airBaltic, Gulf Air, Air Serbia, Thai Smile, Thai, Korean Air, Neos, Virgin Atlantic, Ethiopian Airlines, Vietjet Air, and Iberia.

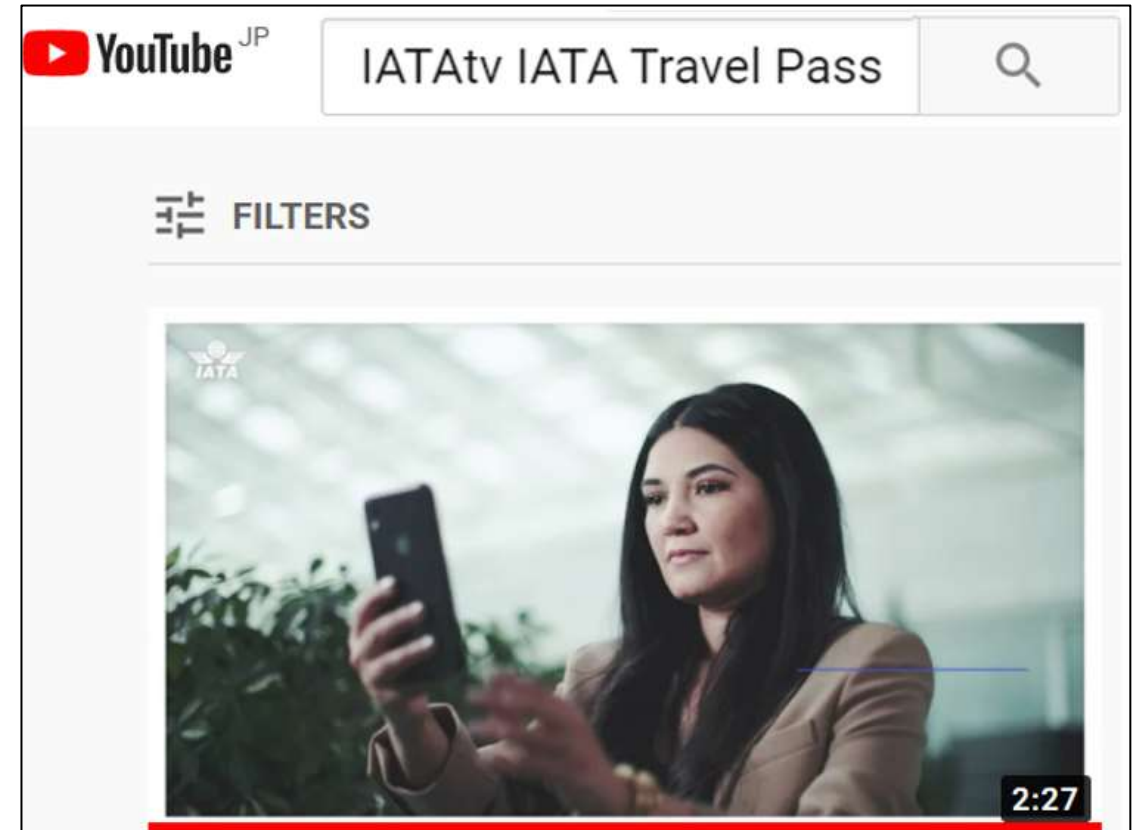
IATA Travel Pass YouTube ユーチューブ動画

日本語字幕付

<https://www.youtube.com/watch?v=iTeAMXfyEX4>.

英語のみ

<https://www.youtube.com/watch?v=R4f1r5iogAo>



Thank you

ありがとうございました

Twitter:

<https://twitter.com/IATA/>

LinkedIn:

https://www.linkedin.com/company/international-air-transport-association-iata?trk=public_post_share-update_actor-text

Facebook:

<https://www.facebook.com/pg/iata.org/videos/>

