3rd Conference of Directors General of Civil Aviation
Middle East Region (MID)

ICAO’s Work on
ICAO Strategic Objectives 2014-2016

Boubacar Djibo
Director, ICAO Air Transport Bureau
Doha, Qatar
April 27 to 29, 2015
Preamble

THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically;
**United Nations**: "Sustainable development meets the needs of the present without compromising the ability of future generations to meet their own needs."

**Triple Bottom Line**: In business, one approach to sustainability is focusing on the impact of decisions on the environment and the community in addition to profit (traditional single bottom line). The diagram illustrates this idea.
Continuous growth of air traffic

Note: world total scheduled services

Source: ICAO

Recovery Passenger-Kilometres (billion)

+5.9% growth rate vs. 2013

Revenue Passenger-Kilometres in 2014*

*preliminary figures
The Size of the Industry in 2013

- 3.1 billion passengers
- 49 million tonnes of freight
- 1,000 scheduled airlines
- 26,000 aircraft in service
- More than 4,000 airports
- 170 air navigation centres

Traffic is for scheduled services in 2013
Number of routes increased by 30% in the last decade showing the dramatic growth of new regional hubs.
Economic Development of Air Transport

Foster the development of a sound and economically-viable civil aviation system. This Strategic Objective reflects the need for ICAO's leadership in harmonizing the air transport framework focused on economic policies and supporting activities.
Outline

• Air Transport Policy and Regulation
• Infrastructure Management
• Aviation Data and Analysis
• Air Transport Fund
Air Transport Policy and Regulation
• Recommendations of ATConf/6 endorsed by the Council
• Council’s action plan to implement the ATConf/6 Recommendations with prioritization, endorsed by 38th Session of the ICAO Assembly
• Assembly Resolution A38-14 Consolidated Statement of continuing ICAO policies in the Air Transport Field
ICAO’s air transport policy and regulation programme is designed to:

a) reduce State’s costs in performing its economic regulatory functions

b) increase consumer’s benefits and choices;

c) improve air connectivity; and

d) create more competitive business opportunities in the marketplace;

thereby contributing to the sustainable economic development and to the expansion of trade and tourism.
Air Transport Regulation Panel (ATRP)

Outcome

ATRP/12: 26-30 May 2014, Montreal, Canada

- **Agreed:** long-term vision for international air transport liberalization
- **Agreed:** set of core principles on consumer protection
- **Established:** working group to draft international agreements on liberalization of market access and air carrier ownership and control
- **Established:** working group to update ICAO guidance on fair competition
- **Endorsed:** plan for future work on implementation of ATConf/6 recs
- **Agreed:** coordinate with other panels on related work (e.g. ADAP)

[Next ATRP/13: Last quarter 2015, Montreal, Canada]
## Liberalization of market access

<table>
<thead>
<tr>
<th>ATConf/6 recommended action</th>
<th>Action</th>
</tr>
</thead>
</table>
| Develop a long-term vision for international air transport liberalization | • ATRP/12 agreed to a text of the vision for the consideration by governing bodies  
• States consulted on the vision for adoption by Council in 2015 through State Letter |
| Develop an international agreement for States to liberalize market access | • ATRP/12 considered initial proposals; established a Working Group (WG1) to develop draft text of the agreement  
• To be considered by ATRP/13 in September 2015  
• ATRP will present proposal to governing bodies in late 2015 or early 2016 |
| Develop an international agreement to liberalize air carrier ownership and control | • Task undertaken by ATRP/12 Working Group 1 (WG1)  
• To be considered by ATRP/13 in September 2015  
• ATRP will present proposal to governing bodies in late 2015 or early 2016 |
<table>
<thead>
<tr>
<th>ATRP and Secretariat action</th>
<th>Action by governing bodies</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop draft text of the Agreements (3\textsuperscript{rd} Q 2015)</td>
<td>• Consider ATRP recommendations re Agreement draft texts (4\textsuperscript{th} Q 2015)</td>
</tr>
<tr>
<td>• Consult Legal Bureau and Legal Committee re draft texts</td>
<td>• Consider results of consultation with LEB and Legal Committee (3\textsuperscript{rd} Q 2016)</td>
</tr>
<tr>
<td>• States consultation on draft Agreement (1\textsuperscript{st} Q 2016)</td>
<td>• Consider results of consultation with States (2\textsuperscript{nd} Q 2016)</td>
</tr>
<tr>
<td>• Revised draft texts (3\textsuperscript{rd} Q 2016)</td>
<td>• Determine action for finalization of the agreements (3\textsuperscript{rd} Q 2016)</td>
</tr>
<tr>
<td>• Finalize Agreements and arrange for signing</td>
<td>• Determine arrangements for signing of agreements</td>
</tr>
<tr>
<td>ATConf/6 recommended action</td>
<td>Action</td>
</tr>
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<td>----------------------------</td>
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</tr>
</tbody>
</table>
| Develop a compendium of competition policies and practices of States and regional bodies | • Preliminary version prepared in 2013  
• ATRP/12 established a Working Group (WG2) to assist in work on this task  
• Updates of the compendium |
| Develop tools such as an exchange forum to enhance cooperation, etc. to promote more compatible regulatory approach towards international air transport | • Seminar on competition policies organized in the context of ICAN |
### Competition Practices

**Practices emanating from Regional competition networks:**
- European Union (EU); Common Market for Eastern and Southern Africa (COMESA)- East Africa Community (EAC) - Southern African Development Community (SADC), Association of Southeast Asian Nations (ASEAN)

**Practices emanating from International Organizations:**
- ICAO policy guidance; Organization for Economic Co-operation and Development (OECD); United Nations Conference on Trade and Development (UNCTAD), World Trade Organization (WTO)

### Competition Policies

**Topics:**
- anticompetitive behaviors; abuse of dominance/monopoly; merger control; State aid

**Regional Organizations:**
- COMESA-EAC-SADC; ACAC; ASEAN; EU; etc.
<table>
<thead>
<tr>
<th>ATConf/6 recommended action</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop a set of core principles</td>
<td>• ATRP/12 agreed on a set of core principles</td>
</tr>
<tr>
<td></td>
<td>• Consulted States through State letter</td>
</tr>
<tr>
<td></td>
<td>• to be submitted to Council as guidance for States and stakeholders</td>
</tr>
<tr>
<td>Monitor related developments and cooperate with other</td>
<td>• Consumer protection database on ICAO website</td>
</tr>
<tr>
<td>International Organizations (incl. UNWTO)</td>
<td>• Closely monitor and work with UNWTO: core principles to be communicated to UNWTO after Council approval</td>
</tr>
</tbody>
</table>
Passenger Guidance

High level core principles

Before the travel
- Balance passenger rights/industry competitiveness
- Pre-travel information, including price transparency

During the travel
- Assistance/compensation, as provided by regulations or contract
- Coordination between stakeholders to address "massive disruptions"

After the Travel
- Efficient complaint handling procedures

Proposed complementing guidance:  
(i) enhanced definition of “massive disruptions”; 
(ii) contingency mechanisms.
### ICAN Benefits

<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Dubai</td>
<td>UAE</td>
</tr>
<tr>
<td>2009</td>
<td>Istanbul</td>
<td>Turkey</td>
</tr>
<tr>
<td>2010</td>
<td>Kingston</td>
<td>Jamaica</td>
</tr>
<tr>
<td>2011</td>
<td>Mumbai</td>
<td>India</td>
</tr>
<tr>
<td>2012</td>
<td>Jeddah</td>
<td>Saudi Arabia</td>
</tr>
<tr>
<td>2013</td>
<td>Durban</td>
<td>South Africa</td>
</tr>
<tr>
<td>2014</td>
<td>Bali</td>
<td>Indonesia</td>
</tr>
</tbody>
</table>

#### Improve efficiency of negotiations
- A place to meet for multiple ASA talks
- A forum to get info, discuss issues
- A platform for bilateral, multilateral talks

- **ICAN/2015:** Antalya, Turkey
- **ICAN/2016:** Latin America

#### Save time and money for States
Dubai, UAE 2008: 27 participating States, 6 Middle East States
Istanbul, Turkey 2009: 52 participating States, 8 Middle East States
Kingston, Jamaica 2010: 39 participating States, 5 Middle East States
Mumbai, India 2011: 65 participating States, 10 Middle East States
Jeddah, Saudi Arabia 2012: 62 participating States, 12 Middle East States
Durban, South Africa 2013: 73 participating States, 7 Middle East States
Bali, Indonesia 2014: 78 participating States, 11 Middle East States
ICAN 2015
Antalya, Turkey (19-23 Oct 2015)

ICAN website
http://www.icao.int/Meetings/ICAN2015
<table>
<thead>
<tr>
<th>ICAO Regional Events</th>
<th>Date</th>
<th>ICAO Regional Events</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>China LCC event</td>
<td>Nov. 2013</td>
<td>ICAN 2014, Indonesia</td>
<td>Nov. 2014</td>
</tr>
<tr>
<td>ICAN 2013, Durban, South Africa</td>
<td>Dec. 2013</td>
<td>Air Transport Meeting, Madagascar</td>
<td>Mar. 2015</td>
</tr>
<tr>
<td>McGill pre-A38 Symposium, Canada</td>
<td>Sept. 2013</td>
<td>ICAN 2015, Turkey</td>
<td>Oct. 2015</td>
</tr>
<tr>
<td>ICAO Air Transport Symposium, Canada</td>
<td>May 2014</td>
<td>ICAO Air Transport Symposium, Canada</td>
<td>Oct. 2015</td>
</tr>
<tr>
<td>Meeting Air Cargo Development Africa, Togo</td>
<td>Aug. 2014</td>
<td>Aviation Data Meeting, India</td>
<td>Nov. 2015 (tbc)</td>
</tr>
<tr>
<td>China LCC event</td>
<td>Oct. 2014</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ICAO’s infrastructure management programme aims at enhancing and promoting sustainable development of infrastructure for the provision and operation of airports and air navigation services.

The programme offers solutions to:

a) improve organizational and managerial capability of providers;
b) reduce the financing burden on governments;
c) protect user’s interests;
d) allow early benefits of new technologies; and
e) facilitate access to funding for long-term investment needs.
<table>
<thead>
<tr>
<th>ATConf/6 recommended action</th>
<th>Action</th>
</tr>
</thead>
</table>
| Multi-disciplinary working group (MDWG) to consider the challenges associated with the establishment of operational and economic incentives | MDWG - First Aviation System Block Upgrades (ASBU/1) met on February 2014  
• 2 Co-secretaries: 1 ATB + 1 ANB  
• 51 participants: 13 Member States, 12 Organizations  
• List of Tasks to be delivered  

MDWG-ASBUs/2 in February 2015 Recommendation:  
• no changes to Doc9082  
• Develop new policies for operational incentives |

**Fifth Airport Economics Panel (AEP) and the Air Navigation Services Economics Panel (ANSEP) to be held in Montréal from 20 to 21 May 2015**

AEP-ANSEP/5 will review the recommendations made by the MDWG-ASBU.
MDWG-ASBUs Time-Frame

**FEB 2014**
MDWG-ASBU/1

**MAY 2014**
- WGs 1, 2, and 3 Intermediate Report 1

**JULY 2014**
- WGs 1, 2, and 3 Preliminary Report 2

**SEPT. 2014**
- WGs 1, 2, and 3 Final Report

**9-10 FEB 2015**
MDWG-ASBU/2

**Working Group Reports to be consolidated**

**MAY 2015**
AEP-ANSEP & GANP

To be ready for the updated GANP for A39
Aviation Data and Analysis
Informed-decision as foundation for building successful businesses

- In a fast-growing industry like aviation, planners and investors require the most comprehensive, up-to-date, and reliable data.
- ICAO’s aviation data/statistics programme provides accurate, reliable and consistent aviation data so that States, international organizations, aviation industry, tourism and other stakeholders can:
  - make better projections;
  - control costs and risks;
  - improve business valuations; and
  - benchmark performance.
Continuous growth of air traffic

Note: world total scheduled services

Source: ICAO
World Air Transport in 2013

- **Passengers carried**: 3.1 billion (+4.5% vs. 2012)
- **Commercial flights performed**: 32 million (+1.2% vs. 2012)
- **Revenue Passenger-Kilometres**: 5.8 trillion (+5.5% vs. 2012)
- **Freight Tonne-Kilometres**: 186 billion (+0.4% vs. 2012)

58.1 million Jobs* supported by aviation worldwide

$2.4 trillion Global economic impact*

*Including direct, indirect, induced and tourism catalytic

Source: Air Transport Action Group (ATAG), 2014
In 2012, for the first time of history, there were *over 1 billion international arrivals.*

Travel and Tourism...
...employs **105 million people** and sustains **277 million jobs** around the world.
...is one of the largest industry in the world.

Over the next 10 years, travel and tourism will create **80 million new jobs**, contribute to the global GDP by **11.4 trillion US$**.

Travel and Tourism accounts for
**9.8%**
Total global GDP

**Source:** Global Travel Association Coalition (GTAC, 2014)
Economic Benefits of Aviation
Focus on Middle East

in 2012 – Middle East

2 million **Jobs*** supported by aviation in Middle East

$1166 billion **Global economic impact***

*including direct, indirect, induced and tourism catalytic

**Source:** Air Transport Action Group (ATAG), 2014
<table>
<thead>
<tr>
<th>Region</th>
<th>Aircraft departures (million)</th>
<th>Passengers carried (million)</th>
<th>Revenue Passenger-Kilometres (billion)</th>
<th>Freight Tonne-Kilometres (billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>7.9</td>
<td>817</td>
<td>1,556</td>
<td>41.5</td>
</tr>
<tr>
<td>Africa</td>
<td>0.9</td>
<td>73</td>
<td>134</td>
<td>3.1</td>
</tr>
<tr>
<td>Middle East</td>
<td>1.1</td>
<td>161</td>
<td>500</td>
<td>22.6</td>
</tr>
<tr>
<td>Asia and Pacific</td>
<td>8.6</td>
<td>1,008</td>
<td>1,785</td>
<td>74.0</td>
</tr>
<tr>
<td>North America</td>
<td>11.0</td>
<td>815</td>
<td>1,505</td>
<td>39.1</td>
</tr>
<tr>
<td>Latin America and Caribbean</td>
<td>2.6</td>
<td>230</td>
<td>303</td>
<td>5.3</td>
</tr>
</tbody>
</table>

**Source:** ICAO Annual Report of the Council 2013
Passenger traffic: Worldwide distribution

Distribution in Revenue Passenger-Kilometres

2007

North America 32%
Asia/Pacific 29%
Europe 27%
Middle East 6%
Latin America/Caribbean 4%
Africa 2%

1st: North America
2nd: Asia/Pacific
3rd: Europe

Source: ICAO Annual Reports of the Council

Scheduled commercial traffic
Total (international and domestic) services
World Top 15 airline groups in Feb 2015

- Top 15 carriers accounted for 47.2% of the World Total Traffic in terms of RPKs
- 5 carriers from Asia/Pacific
- 4 carriers from North America
- 4 carriers from Europe
- 1 carrier from Middle East
- 1 carrier from Latin America/Caribbean
- Highest growth → China Southern Airline with +14.7% RPK growth

Source: Airline websites and ICAO estimates
Middle East
Top 15 Airlines - Top 15 Airports in 2013

### AIRLINES

<table>
<thead>
<tr>
<th>Airlines</th>
<th>RPK (billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emirates</td>
<td>209.4</td>
</tr>
<tr>
<td>Qatar Airways</td>
<td>79.8</td>
</tr>
<tr>
<td>Etihad Airways</td>
<td>56.8</td>
</tr>
<tr>
<td>Saudi Arabian Airlines</td>
<td>44.7</td>
</tr>
<tr>
<td>El Al</td>
<td>18.7</td>
</tr>
<tr>
<td>Air Arabia</td>
<td>12.4</td>
</tr>
<tr>
<td>Flydubai</td>
<td>12.0</td>
</tr>
<tr>
<td>Oman Air</td>
<td>11.3</td>
</tr>
<tr>
<td>Royal Jordanian</td>
<td>8.6</td>
</tr>
<tr>
<td>Gulf Air</td>
<td>7.9</td>
</tr>
<tr>
<td>Kuwait Airways</td>
<td>6.8</td>
</tr>
<tr>
<td>Mahan Air</td>
<td>4.9</td>
</tr>
<tr>
<td>NAS</td>
<td>4.6</td>
</tr>
<tr>
<td>Iran Air</td>
<td>4.3</td>
</tr>
<tr>
<td>Iran Aseman Airline</td>
<td>4.0</td>
</tr>
</tbody>
</table>

### AIRPORTS

<table>
<thead>
<tr>
<th>Airport</th>
<th>Departures (thousand)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dubai (DXB)</td>
<td>185.0</td>
</tr>
<tr>
<td>Doha (DOH)</td>
<td>102.9</td>
</tr>
<tr>
<td>Jeddah (JED)</td>
<td>82.6</td>
</tr>
<tr>
<td>Riyadh (RUH)</td>
<td>80.7</td>
</tr>
<tr>
<td>Abu Dhabi (AUH)</td>
<td>67.6</td>
</tr>
<tr>
<td>Tehran (THR)</td>
<td>53.0</td>
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<tr>
<td>Tel-Aviv (TLV)</td>
<td>52.4</td>
</tr>
<tr>
<td>Al Ain (AAAN) *</td>
<td>46.7</td>
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<tr>
<td>Bahrain (BAH) **</td>
<td>45.4</td>
</tr>
<tr>
<td>Kuwait (KWI)</td>
<td>41.4</td>
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<tr>
<td>Muscat (MCT)</td>
<td>40.6</td>
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<tr>
<td>Dammam (DMM)</td>
<td>36.4</td>
</tr>
<tr>
<td>Sharjah (SHJ)</td>
<td>34.2</td>
</tr>
<tr>
<td>Amman (AMM)</td>
<td>34.0</td>
</tr>
<tr>
<td>Beirut (BEY)</td>
<td>31.5</td>
</tr>
</tbody>
</table>

**YoY**
- Emirates: + 15.8%
- Qatar Airways: + 11.0%
- Etihad Airways: + 19.0%
- Saudi Arabian Airlines: + 9.6%
- El Al: + 4.4%
- Air Arabia: + 15.1%
- Flydubai: + 28.3%
- Royal Jordanian: + 10.2%
- Gulf Air: + 0.2%
- Kuwait Airways: - 26.8%
- Mahan Air: - 7.0%
- NAS: + 5.0%
- Iran Air: + 9.8%
- Iran Aseman Airline: - 11.1%
- Beirut (BEY): - 12.5%

- Dubai airport is the 1st airport in terms of departures.
- Al Ain airport achieved the highest growth in 2013 by +18.9%.

* Mostly general aviation
** estimate

**Note:**
- 1st airline is Emirates, and its traffic is over double of the 2nd carrier.
- The top3 carriers in Middle East achieved a double-digit growth in 2013.

**Source:**
- ICAO Form A and ICAO estimates
- ACI

**Note:**
- total (int. and dom.) scheduled and non-scheduled services
- total (int. and dom.) scheduled services

*ICAO estimate
**Middle East (Cairo Regional Office)**

**Top 15 Airlines - Top 15 Airports in 2013**

<table>
<thead>
<tr>
<th>AIRLINES</th>
<th>RPK (billion)</th>
<th>YoY</th>
<th>AIRPORTS</th>
<th>Departures (thousand)</th>
<th>YoY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emirates</td>
<td>209.4</td>
<td></td>
<td>Dubai (DXB)</td>
<td>185.0</td>
<td>+ 7.5%</td>
</tr>
<tr>
<td>Qatar Airways</td>
<td>79.8</td>
<td>+ 15.8%</td>
<td>Doha (DOH)</td>
<td>102.9</td>
<td>+ 7.7%</td>
</tr>
<tr>
<td>Etihad Airways</td>
<td>56.8</td>
<td>+ 11.0%</td>
<td>Jeddah (JED)</td>
<td>82.6</td>
<td>- 2.3%</td>
</tr>
<tr>
<td>Saudi Arabian Airlines</td>
<td>44.7</td>
<td>+ 19.0%</td>
<td>Riyadh (RUH)</td>
<td>80.7</td>
<td>+ 5.1%</td>
</tr>
<tr>
<td>Egypt Air</td>
<td>18.8</td>
<td>+ 9.6%</td>
<td>Cairo (CAI)</td>
<td>71.1</td>
<td>- 0.3%</td>
</tr>
<tr>
<td>Air Arabia</td>
<td>12.4</td>
<td>+ 2.9%</td>
<td>Abu Dhabi (AUH)</td>
<td>67.6</td>
<td>+ 11.2%</td>
</tr>
<tr>
<td>Flydubai</td>
<td>12.0</td>
<td>+ 14.9%</td>
<td>Tehran (THR)</td>
<td>53.0</td>
<td>- 4.6%</td>
</tr>
<tr>
<td>Oman Air</td>
<td>11.3</td>
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<td>Al Ain (AAN) *</td>
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<td>Gulf Air</td>
<td>7.9</td>
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<td>Kuwait (KWI)</td>
<td>41.4</td>
<td>- 3.3%</td>
</tr>
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<td>Kuwait Airways</td>
<td>6.8</td>
<td>- 26.8%</td>
<td>Muscat (MCT)</td>
<td>40.6</td>
<td>+ 10.0%</td>
</tr>
<tr>
<td>Mahan Air</td>
<td>4.9</td>
<td>- 7.0%</td>
<td>Dammam (DMM)</td>
<td>36.4</td>
<td>+ 8.2%</td>
</tr>
<tr>
<td>National Air Services - NAS</td>
<td>4.6</td>
<td>+ 5.0%</td>
<td>Sharjah (SHJ)</td>
<td>34.2</td>
<td>+ 1.4%</td>
</tr>
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<td>Iran Air</td>
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<td>+ 9.8%</td>
<td>Amman (AMM)</td>
<td>34.0</td>
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<td>Iran Asseman Airlines</td>
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<td>- 11.1%</td>
<td>Beirut (BEY)</td>
<td>31.5</td>
<td>- 0.4%</td>
</tr>
</tbody>
</table>

- **Emirates**, **Qatar Airways** and **Etihad Airways** in the top 3 with a double-digit growths
- Double-digit growth of LCCs: **Air Arabia** and **Flydubai**
- **Dubai**, **Doha** and **Abu Dhabi** recorded respectively 7.5%, 7.7% and 11.2% growths
- **Abu Dhabi**, **Al Ain** and **Muscat** recorded double-digit growth in departures in 2013

*Note: total (int. and dom.) scheduled services
Source: ICAO Form A and ICAO estimates

*Mostly general aviation
**estimate

*Mostly general aviation
**estimate

*ICAO estimate
World International Cargo Shipment

**Volume** of world international cargo shipment

**Value** of world international cargo shipment

- **Aviation**: 0.5%
- **Surface modes**: 34.6%

One third of the value of world trade is shipped by air

$6.4$ trillion

*Source: Air Transport Action Group (ATAG), 2014*
### Freight Tonne-Kilometres (billion)

<table>
<thead>
<tr>
<th>Region</th>
<th>Freight Tonne-Kilometres</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>41.5</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Africa</td>
<td>3.1</td>
<td>+4.0%</td>
</tr>
<tr>
<td>Middle East</td>
<td>22.6</td>
<td>+12.0%</td>
</tr>
<tr>
<td>Asia and Pacific</td>
<td>74.0</td>
<td>+0.2%</td>
</tr>
<tr>
<td>North America</td>
<td>39.1</td>
<td>-4.9%</td>
</tr>
<tr>
<td>Latin America and Caribbean</td>
<td>5.3</td>
<td>+2.7%</td>
</tr>
</tbody>
</table>

**Total (international and domestic) services:** 186 billion vs. 2012

**ICAO is expecting +4.6% freight traffic growth in 2014**

*Preliminary result*

**Source:** ICAO Annual Report of the Council 2013
Air Cargo Traffic: Worldwide Distribution

Distribution in Freight Tonne-Kilometres

2007

1st: Asia/Pacific
2nd: North America
3rd: Europe

Asia/Pacific: 42%
Europe: 22%
North America: 21%
Middle East: 12%
Latin America/Caribbean: 3%
Africa: 1%
Middle East: 6%
Europe: 23%
North America: 25%

Source: ICAO Annual Reports of the Council

Scheduled commercial traffic
Total (international and domestic) services
Future of Air Cargo ??????
Long-Term Air Traffic Forecasts: “GATO”
Middle East - Scheduled Passenger Traffic

Passenger traffic (RPK) to/from and within Middle East

- **History**
  - 8.7% total traffic 1995-2010 AAGR*

- **Forecasts**
  - 6.2% total traffic 2011-2030 AAGR*

*Source: Cir 333, Global Air Transport Outlook to 2030 - GATO*
Long-Term Air Traffic Forecasts: “GATO”
Middle East - Scheduled Freight Traffic

Freight traffic (FTK) to/from and within Middle East

- **History**: 9.1% total traffic 1995-2010 AAGR*
- **Forecasts**: 5.9% total traffic 2011-2030 AAGR*

*Source: Cir 333, Global Air Transport Outlook to 2030 - GATO*
Outcomes

- **Single set of harmonized forecasts**: working group
- Statistical forms
  - Discontinuation: 4 Forms (H, I — Part II, L and N)
  - Amendment: 3 Forms (A-S, B and E-F)
- **Cooperation with International Organizations**
  - ICAO/ACI common form on airport traffic
  - UNWTO (tourists vs. passengers, travel facilitation, taxation, connectivity)
  - Others
- Improve the framework of the ICAO Statistics Programme by creating and implementing **dedicated SARPs**
- Data collection through **web application**: working group
- Enhancement of **BI tools for data quality** and analysis
- Ensure coordination between MDWG-ASBUs, ATRP and ADAP
2013 – State of Air Transport
Air Transport Bureau

International and domestic scheduled traffic
Edited in August 2014

Air Transport Monthly Monitor

ECONOMIC DEVELOPMENT
OCT 2013: Air Transport Monthly Monitor

http://www.icao.int/sustainability/Pages/Air-Traffic-Monitor.aspx
• Released April 2015
• Dynamic and graphical presentation of large amounts of air transport statistic data collected from Member States
• Cloud-based tool
• enables users to quickly identify patterns, trends, differences and similarities between data selections and make competitive analyses (benchmarking) more accessible.
• Distribute free “authorization codes” to Council members, Member States and Secretariat on a regular basis

• Business Analysis Tools currently available:
  – International traffic mapping and data tool
  – Air services agreement (WASA) visualization
  – Aeronautical treaty map
  – Traffic Trend tool
  – iStars applications (integrated)

Access through ICAO eTOOLS Website
www.icao.int/etools
Study on Regional Differences in International Airline Operating Economics

• unique and fundamental source of data
• used by stakeholders for essential tasks such as analysis of airline operating economics, evaluation of the impact of regulatory change and environmental planning
• results of the study are also used by the IATA Prorate Agency to prorate passenger revenues from interline journeys

Number of replies to the recent State letter not satisfying, especially from States of the Middle East region
(EC 2/20.3.2.14/ 87 dated 21 November 2014)
Air Transport Fund
Voluntary Air Transport Fund (TRAF)

- Established in 2014 thanks to a UAE initiative
- Mechanism for the collection and use of voluntary contributions from States and other donors to support ICAO’s work in the air transport field
- For projects and activities not covered by the Regular Programme Budget under the new Strategic Objective, Economic Development of Air Transport
- Consistent, transparent, efficient and timely
- Streamlined administration of donated funds

For more information:
http://www.icao.int/sustainability/Pages/TRAF.aspx
Instruments

*Convention on international interests in mobile equipment*
Signed in Cape Town on 16 November 2001

*Protocol to the Convention on international interests in mobile equipment on matters specific to aircraft equipment*
Signed in Cape Town on 16 November 2001

Entry into force: 1st March 2006
Cape Town Convention

**Status of Ratification** *(as of Feb 2015)*

- **Member Countries (incl. aircraft protocol)**
- **European Union (incl aircraft protocol)**
- **Member Countries (no protocols)**
- **Member Country (incl both protocols) ratification also covered by European Union**

- **North America:** 2
- **Latin America:** 7
- **Europe:** 11 + EU
- **Middle East:** 6
- **Asia Pacific:** 18
- **Africa:** 19

- **Luxembourg**
Main reasons for ratification by States

- **Legal advantages**
  - new **uniform international regimen** governing the taking of security in high-value mobile equipment, based on the creation of an **international interest**
  - **improve predictability** as to the enforceability of security, title reservation and leasing rights in aircraft objects

- **Economic advantage**
  - **provide confidence** to lenders and institutional investors
  - **attract** domestic and foreign **capital**
  - **improve opportunities for asset-based financing** of high-value aircraft equipment **reduce risks for creditors** and consequently **borrowing costs** for debtors
  - **improved safety** by assisting airlines in many jurisdictions in their efforts to modernize and upgrade their fleet
  - **Reduce fuel and maintenance costs** by having a more fuel efficient fleet

- **Environment advantage**
  - **Improve the fuel efficiency of the fleet** and reduce the emissions of greenhouse effect gases
In Summary

What ICAO can do for you

- **Aviation Security**
  - Assist you in the identification of deficiencies in your aviation security system
  - Assist you in addressing and solving those deficiencies
  - Assist you in enhancing your aviation security and facilitation capabilities

- **Economic Development of Air Transport**
  - Assist you in estimating the economic contribution of air transport to your economy
  - Assist you in the analysis of your portfolio of bilateral agreements and in identifying new opportunities
  - Assist you in your aviation forecasting and planning activities

- **Environmental Protection**
  - Assist you in the preparation of your action plans to reduce CO2 emissions from aviation
  - Assist you in the estimation of the environmental benefits of air navigation (ATM and operational) measures including ASBU
شكرا
Thank you