



57th DGCA Asia and Pacific Region

Agenda Item 6

Economic Development of Air Transport

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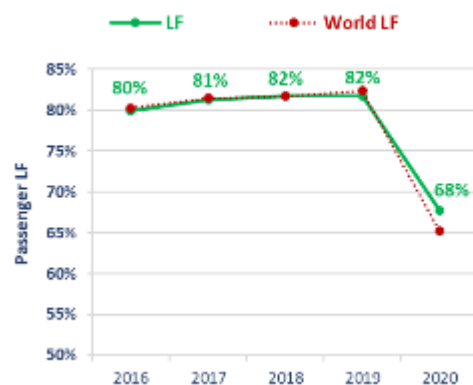
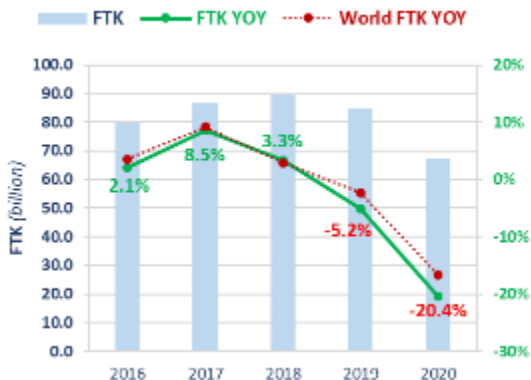
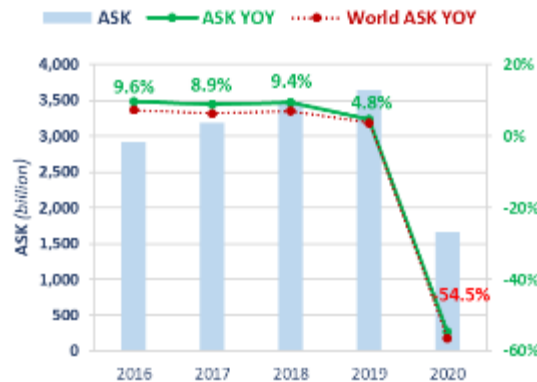
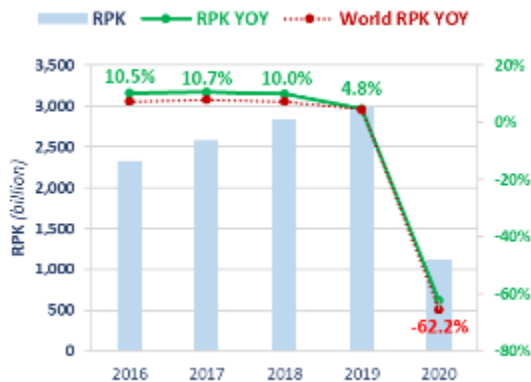


State of the Industry



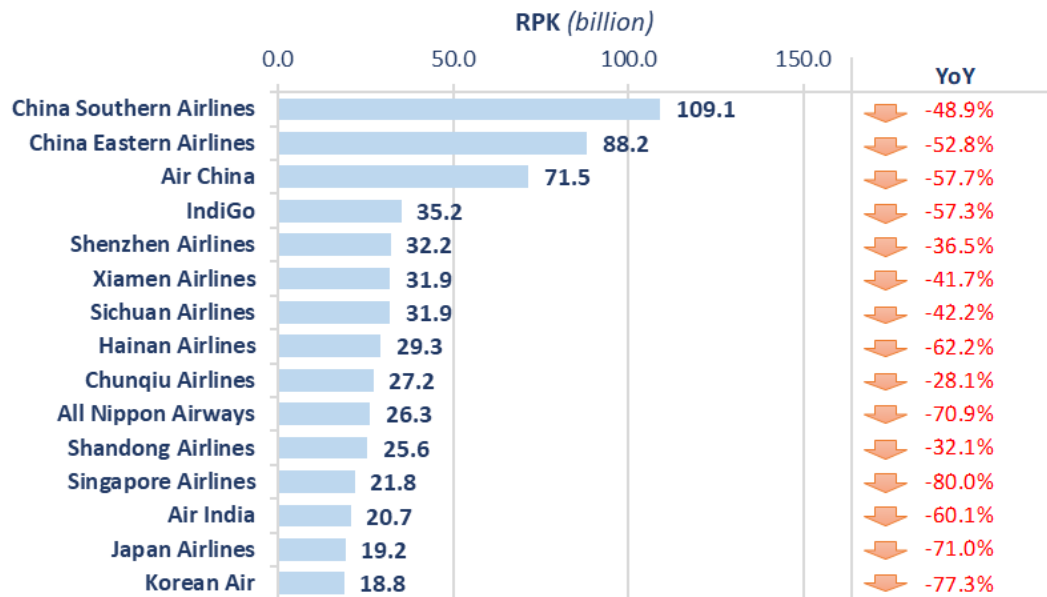


State of Air Transport in APAC in 2020





Top Airlines in APAC in 2020



Top 15 airlines accounted for 53.2% of the traffic performed by carriers of APAC



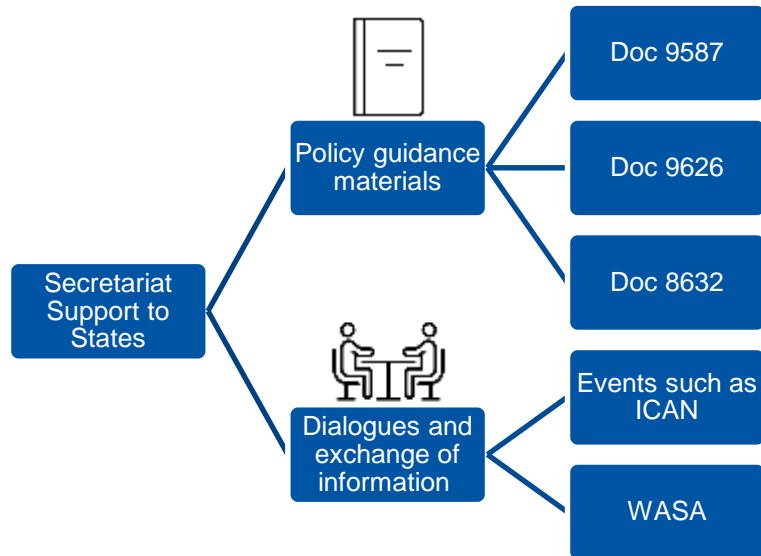
Air Transport Policy and Regulation





ICAO's Long-term Vision for International Air Transport Liberalization

✈️ A40 - "Urges all Member States to give regard to, and apply, the ICAO Long-term Vision for International Air Transport Liberalization in policy making and regulatory practices"





Sixteenth Meeting of the Air Transport Regulation Panel (ATRP/16)



Airline ownership and control

- Revised draft Convention on Foreign Investment in Airlines was discussed
- Continue to work on finalizing the draft Convention



Liberalization of air cargo

- Examination on whether there is a need for a specific agreement



Unmanned aircraft

- Examination on whether there is a need to develop guidance for economic regulation of international operations of unmanned aircraft

ICAO's Competition Compendium



Description

- Information on Member States and regional organization regulatory framework in the field of competition



Scope

- Competition laws
- Regulations and practices
- Cooperation in the field of competition



Coverage

- 129 Member States
- 3 regional organizations

Continuous update

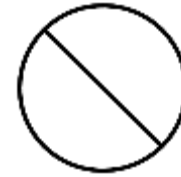


Consumer Protection



ICAO Compendium on Consumer Protection

- 189 Member States
- 4 regional organizations



Compendia on Emergency Response Planning (ERP)

- 28 Member States
- States are encouraged to update the Secretariat



Infrastructure Management



Focus areas

**Charges for
Airports and
Air Navigation
Services**

**Economic
Oversight of
Airports and
Air Navigation
Services**

**Privatization
of Airports
and ANSPs**

**Funding for
CAAs and
Oversight
Functions**

**Funding,
Financing and
Investment
for
Infrastructure**

Airport Economics Panel and Air Navigation Services Economics Panel (AEP-ANSEP)

Harmonizing global regulatory framework by developing policies and guidance materials

- **Doc 9082** – ICAO's Policies on Charges for Airports and Air Navigation Services
- **Doc 9562** – Airport Economics Manual
- **Doc 9161** – Manual on Air Navigation Services Economics
- **Doc 9980** – Manual on Privatization in the Provision of Airports and Air Navigation Services



NEW! Manual on Economic and Financial Analyses for Aviation Infrastructure Projects

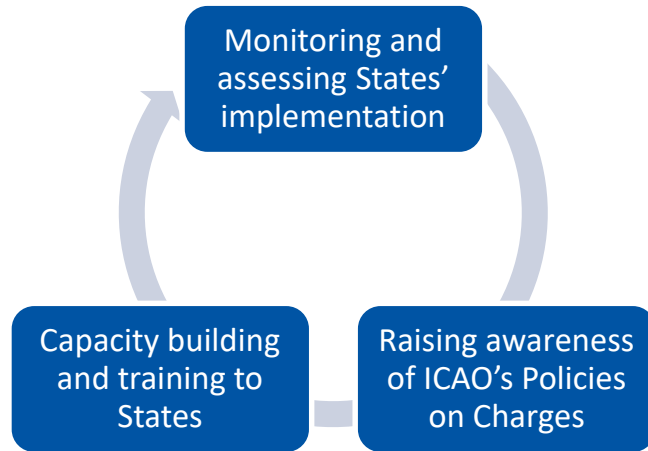
Ongoing activities

Eighth Joint Meeting of the Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP/8)

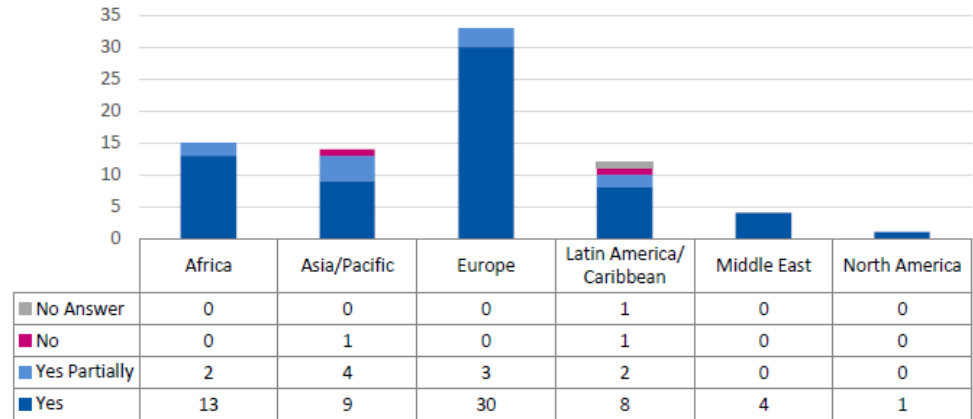
- ✈ Virtual panel meeting held from 29 November to 3 December 2021
- ✈ Update of ICAO's policies and guidance on airport and air navigation services economics
- ✈ New guidance and tools to support investment decisions of financing aviation infrastructure
- ✈ Development of guidance on funding for the provision of services to civil aviation, e.g. MET, space weather information, UAS operation
- ✈ Modernization of Tariffs for Airports and Air Navigation Services (Doc 7100)
- ✈ Economic impact of COVID-19 on airports and air navigation services



Enhancing the implementation of ICAO's policies on charges



States' implementation of ICAO's policies on charges for airports and air navigation services (2020)



■ Yes ■ Yes Partially ■ No ■ No Answer

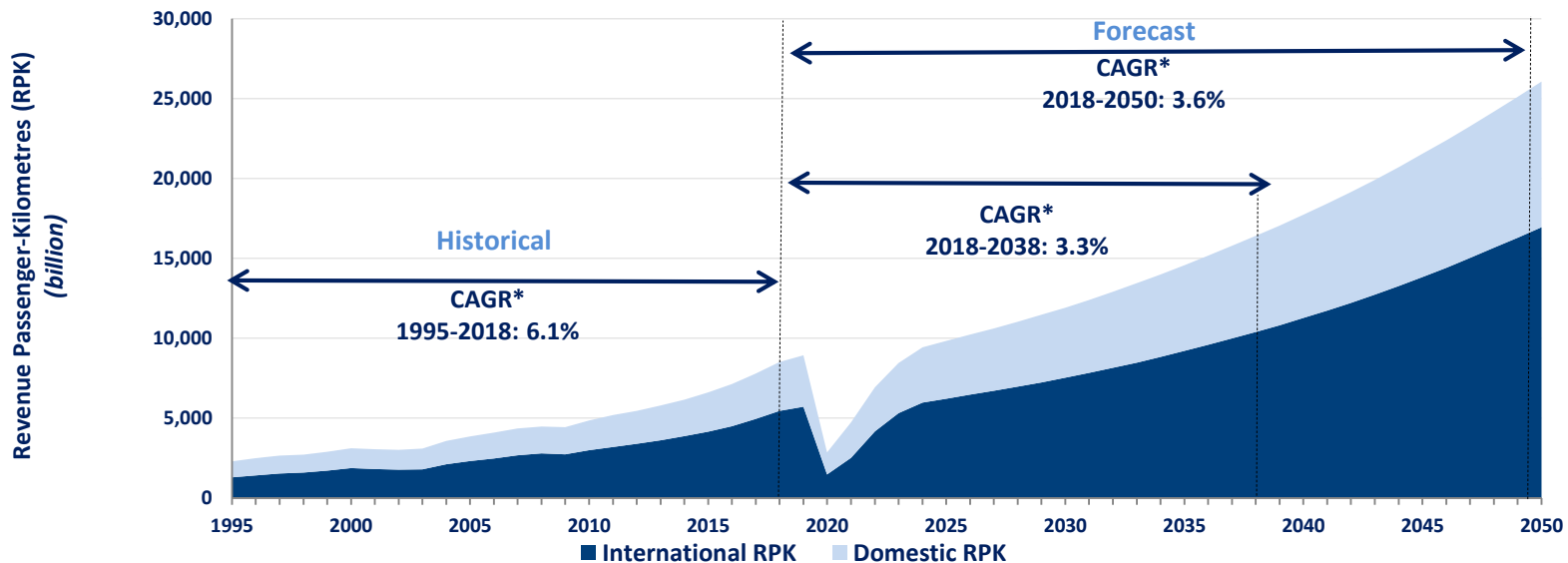


Aviation Data and Analysis





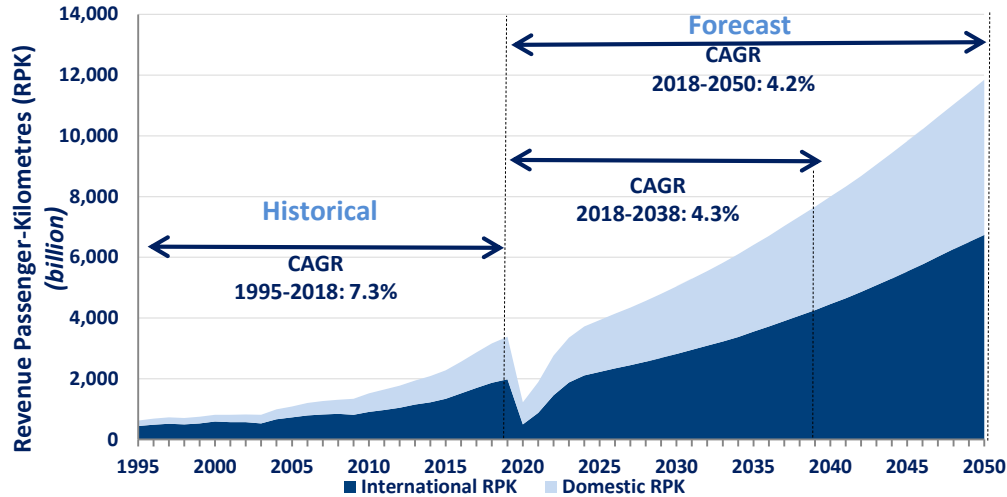
ICAO long-term passenger traffic forecasts* (Global)



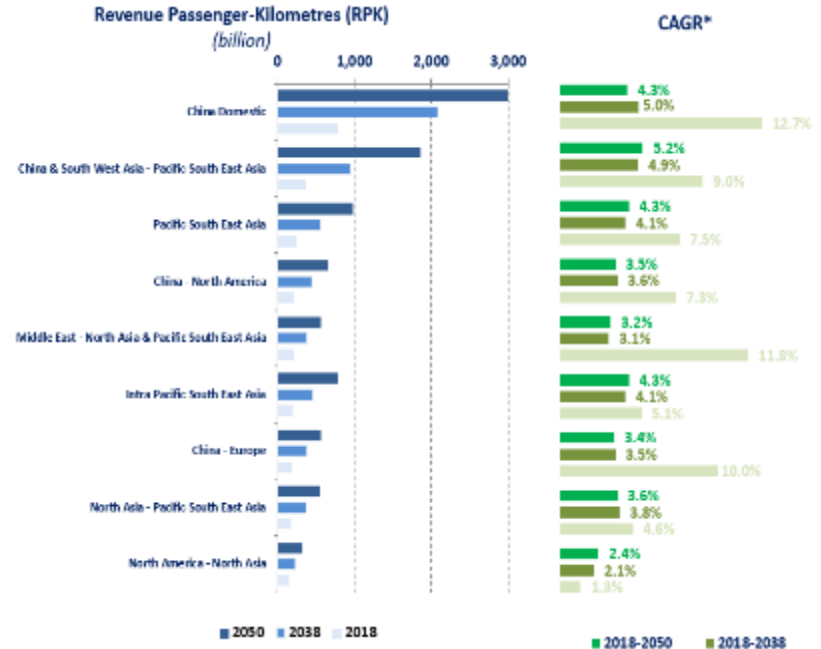
- Global traffic is forecasted to grow by 3.6% CAGR for the period 2018-2050
- International and Domestic traffic are forecasted to grow by 3.6% and 3.5% CAGR respectively



ICAO long-term passenger traffic forecasts* (Asia/Pacific)



Asia/Pacific top10 Route groups



- Asia/Pacific traffic is forecasted to grow by 7.3% CAGR for the period 2018-2050. International and domestic traffic are forecasted to grow by 6.4% and 8.9% respectively
- China & South West Asia - North Asia and China & South West Asia - Pacific South East Asia are fastest growing international route groups in the region with 5.5% and 5.2% forecast CAGR respectively

* Source: ICAO long-term traffic forecasts, <https://data.icao.int/icads/Product/View/26>



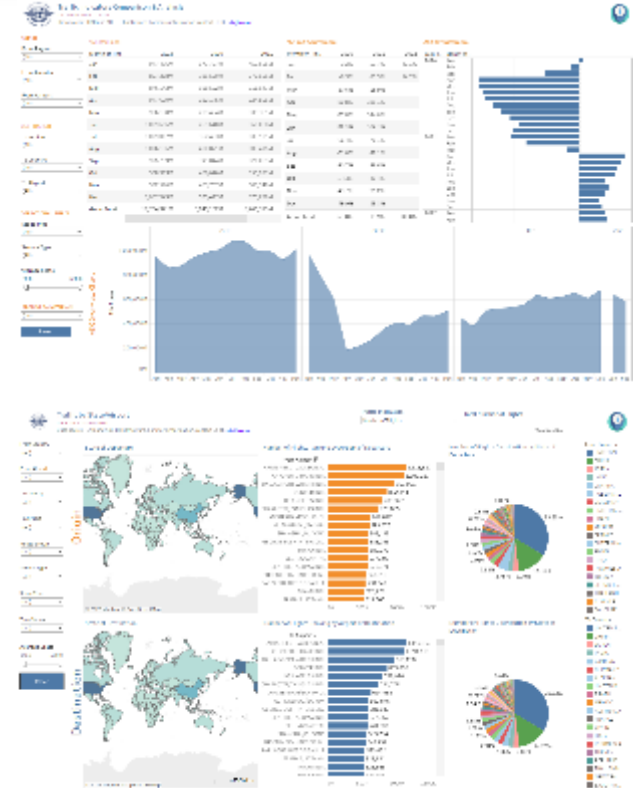
United Nations Sustainable Development Goals – UN SDG

- ICAO is the custodian agency of the UN SDG indicator 9.1.2 on passengers and freight volumes, by mode of transport – collaboration with other agencies (UNCTAD, ITF-OECD) for the provision of rail, road and maritime data
- The data and analysis provided is reflected in the annual global SDG report and in the online UN platform for monitoring the progress towards the SDGs
- This indicator assists ICAO Member States to monitor and benchmark air transport infrastructure and to facilitate related investments. ICAO encourages States to include clear references to the SDGs in their national aviation plans, with the objective of showcasing the contribution of aviation to the UN SDGs and national economies



Development of traffic dashboards

- Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**
- cover a **wide array of analytics** ranging from operations, fleet usage, passenger carried, Flight Information Region (FIR) traffic, and revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity
- Dashboards were presented to the ICAO Council in June 2022. Member States were provided with one free license
- Expected to be valuable to the ICAO Council and Member States in their **current and post COVID-19 pandemic planning and implementation efforts**



Development of an Aviation Competitiveness Index

Objectives

- use a standardized methodology to measure **the level of competitiveness of the aviation sector**
- The ACWG commonly agreed that the objective of the competitiveness index is **to measure the performance of the aviation of a State and its ability to create and maintain value from the sector**
- The measurement of aviation competitiveness using standard methodologies will assist States in learning successful experiences and act appropriately in improving their competitiveness and **leveraging optimally the social-economic benefits of aviation**

Results

- Aviation Competitiveness index can drive outcomes and be a core lever for policy interventions
- Aviation Competitiveness working group progress was presented to the Eleventh Session of the Statistics Division in April 2022



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Upcoming Events



Upcoming Events

ICAN2022

Abuja, Nigeria

5-9 December 2022

Hosted by the Nigerian Civil Aviation Authority



2022 ICAD Air Services Negotiation Event
Abuja, Nigeria | 5-9 December 2022

ICAN2022



Actions by the DGCA

The DGCA Conference is invited to:

- ✈ support ICAO's work for Economic Development of Air Transport;
- ✈ encourage States to apply and follow ICAO's policies and guidance in the air transport field in their regulatory practices;
- ✈ encourage States to apply and follow ICAO's policies and guidance on infrastructure management including the charging policies;
- ✈ encourage States to provide statistics required by ICAO in a timely manner;
- ✈ encourage States to use ICAO data, tools and analysis; and
- ✈ encourage States to actively participate in the ICAO upcoming meetings.



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THANK YOU!