



ICAO

# INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY



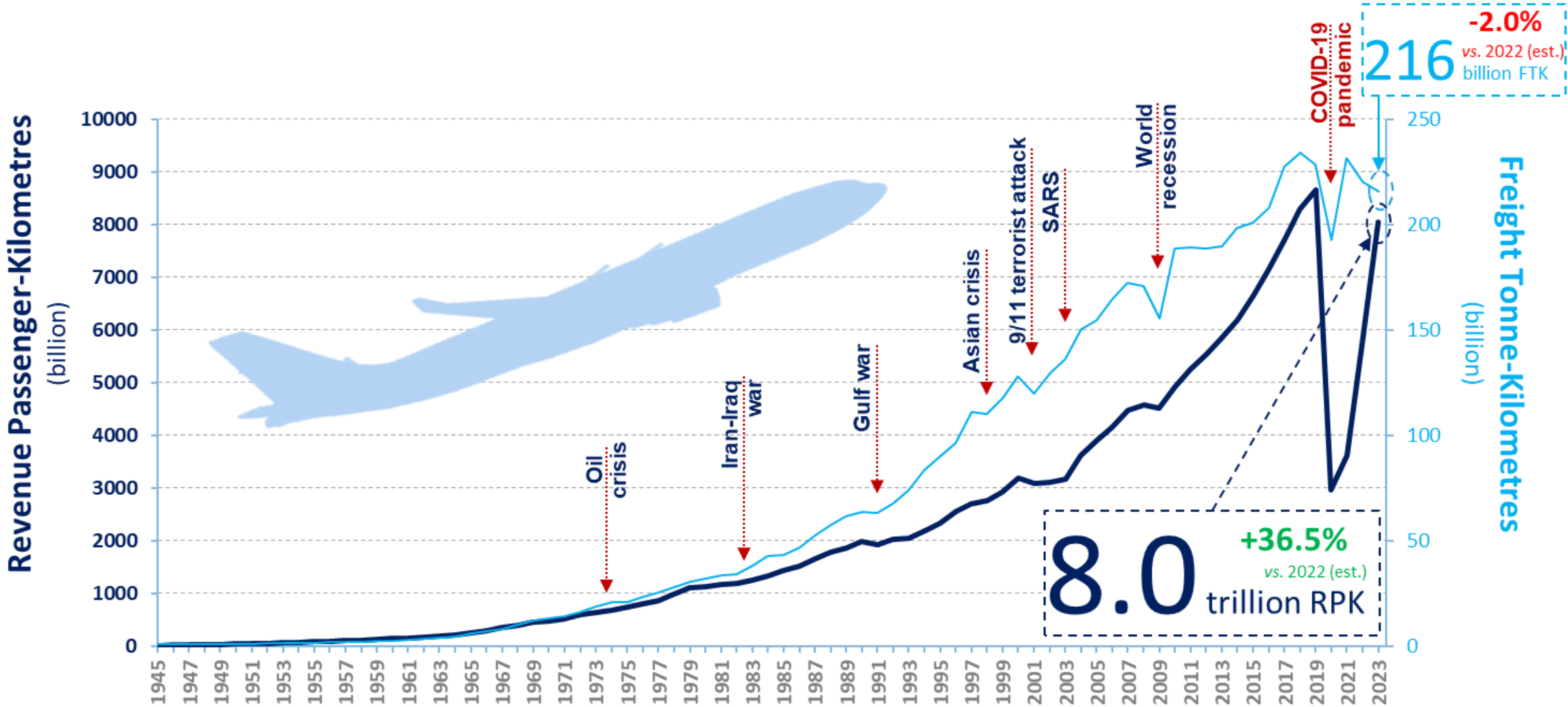
# Economic Development of Air Transport: Air Transport Updates

**59<sup>th</sup> Conference of Directors General of Civil Aviation  
Asia and Pacific Regions  
15 to 19 October 2024  
Cebu, Philippines**

**International Civil Aviation Organization (ICAO)**

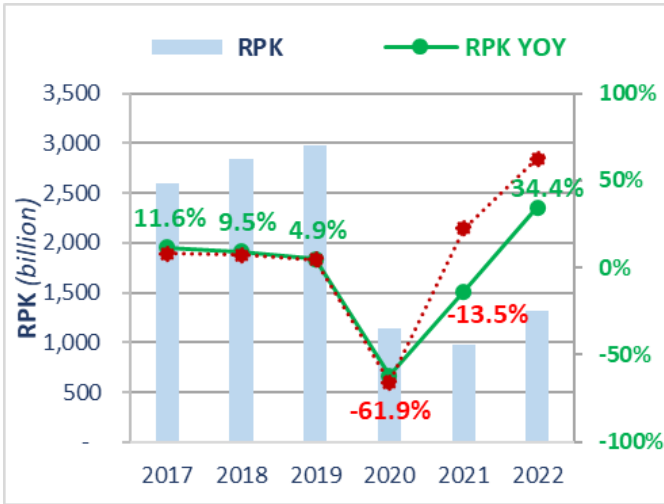
# Aviation Data and Analysis

# Global traffic: A recovery from the pandemic shock

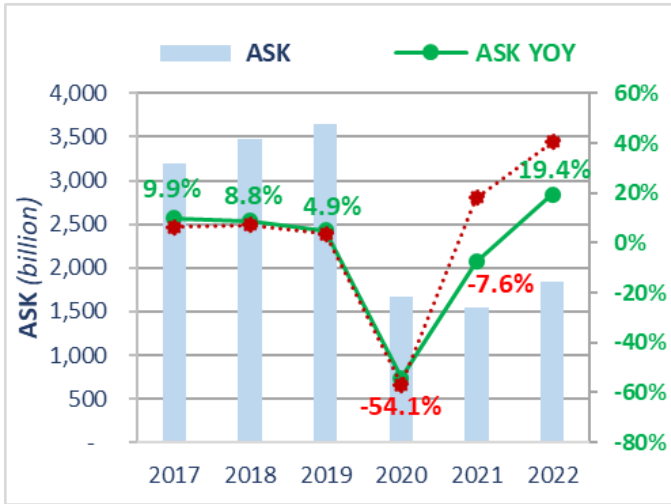


Source: Presentation of Air Transport Statistical Result

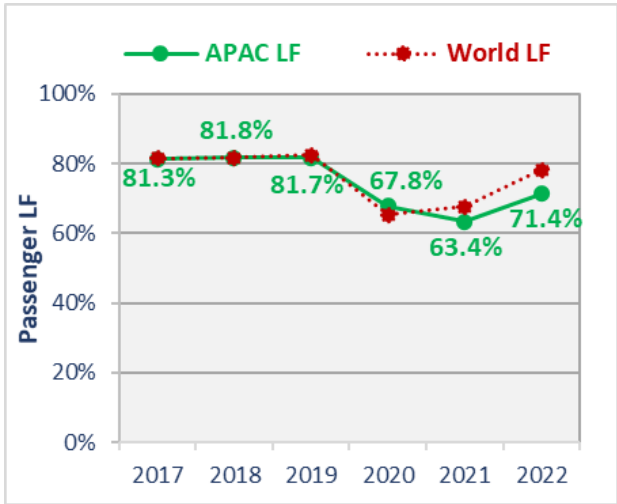
# Asia/Pacific Passenger Traffic



- Passenger traffic in Revenue Passenger-Kilometres (RPKs) increased by 34.4% in 2022.
- Passenger traffic increase rate is lower than the world average.

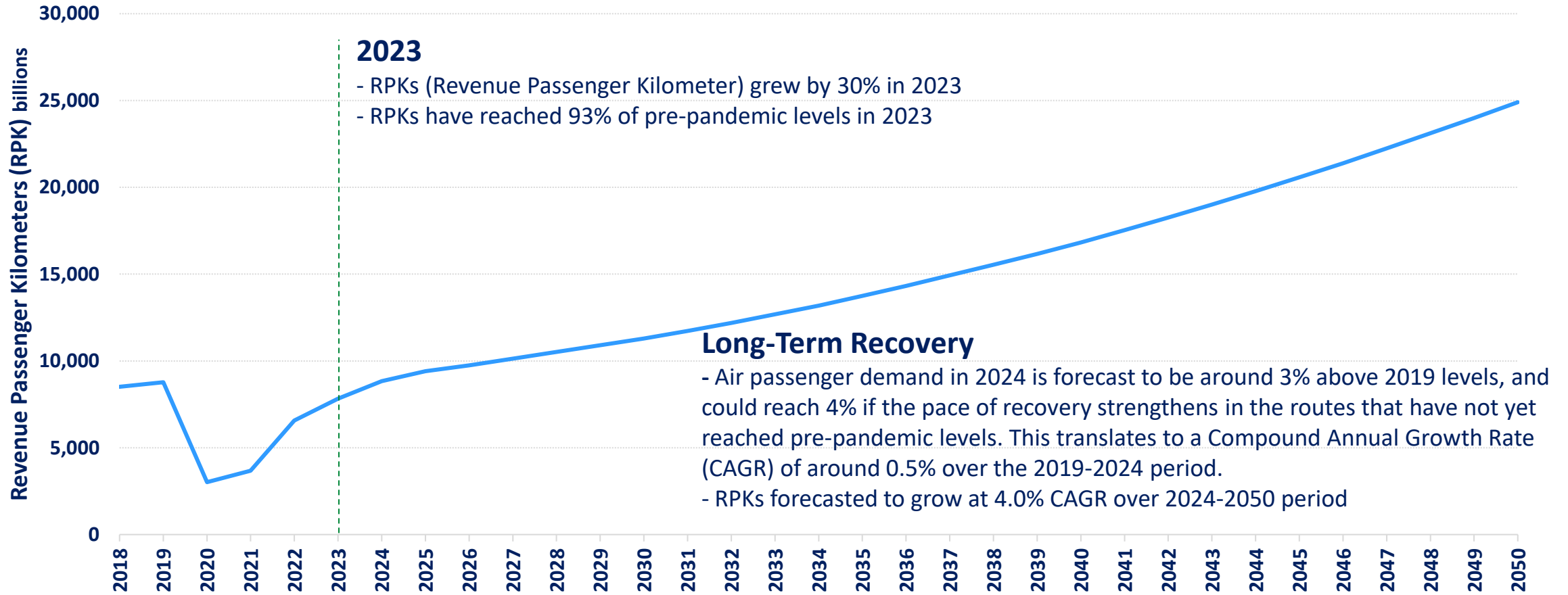


- Seat Capacity in Available Seat-Kilometres (ASKs) increased by 19.4% in 2022.
- Capacity increase rate is lower than the world average.



- Passenger load factor increased to 71.4% in 2022.
- Passenger load factor is lower than the world average.

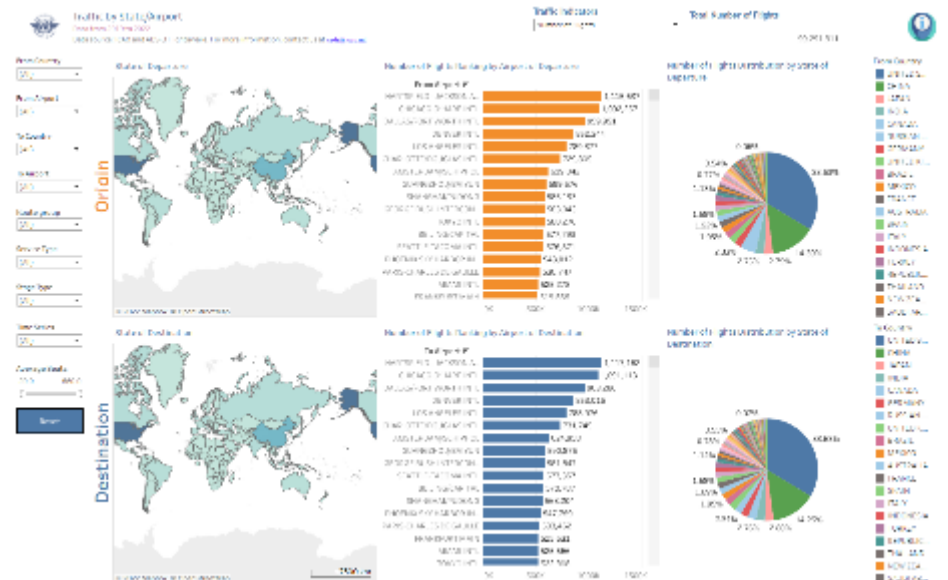
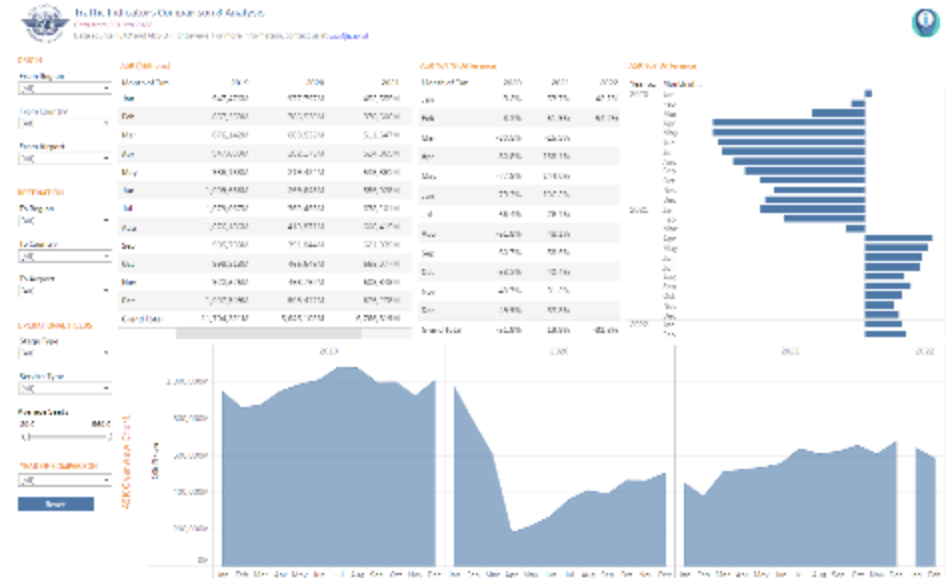
# Global Long Term Traffic Forecast (RPKs)



Source: ICAO Long Term Forecasts

# ICAO Traffic and Economic Dashboards

- ✈ Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**.
- ✈ Covering a **wide array of analytics**:
  - operations;
  - fleet usage;
  - passenger carried;
  - Flight Information Region (FIR) traffic;
  - revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity.
- ✈ Each Member States has been provided with a free license.



# Air Transport Policy and Regulation

# ICAO's Long-term Vision for International Air Transport Liberalization<sup>9</sup>

---

The ICAO Council, during its 205th session, endorsed the recommendation made by the Sixth Worldwide Air Transport Conference (ATConf/6) to adopt the ICAO Long-term Vision for International Air Transport Liberalization:

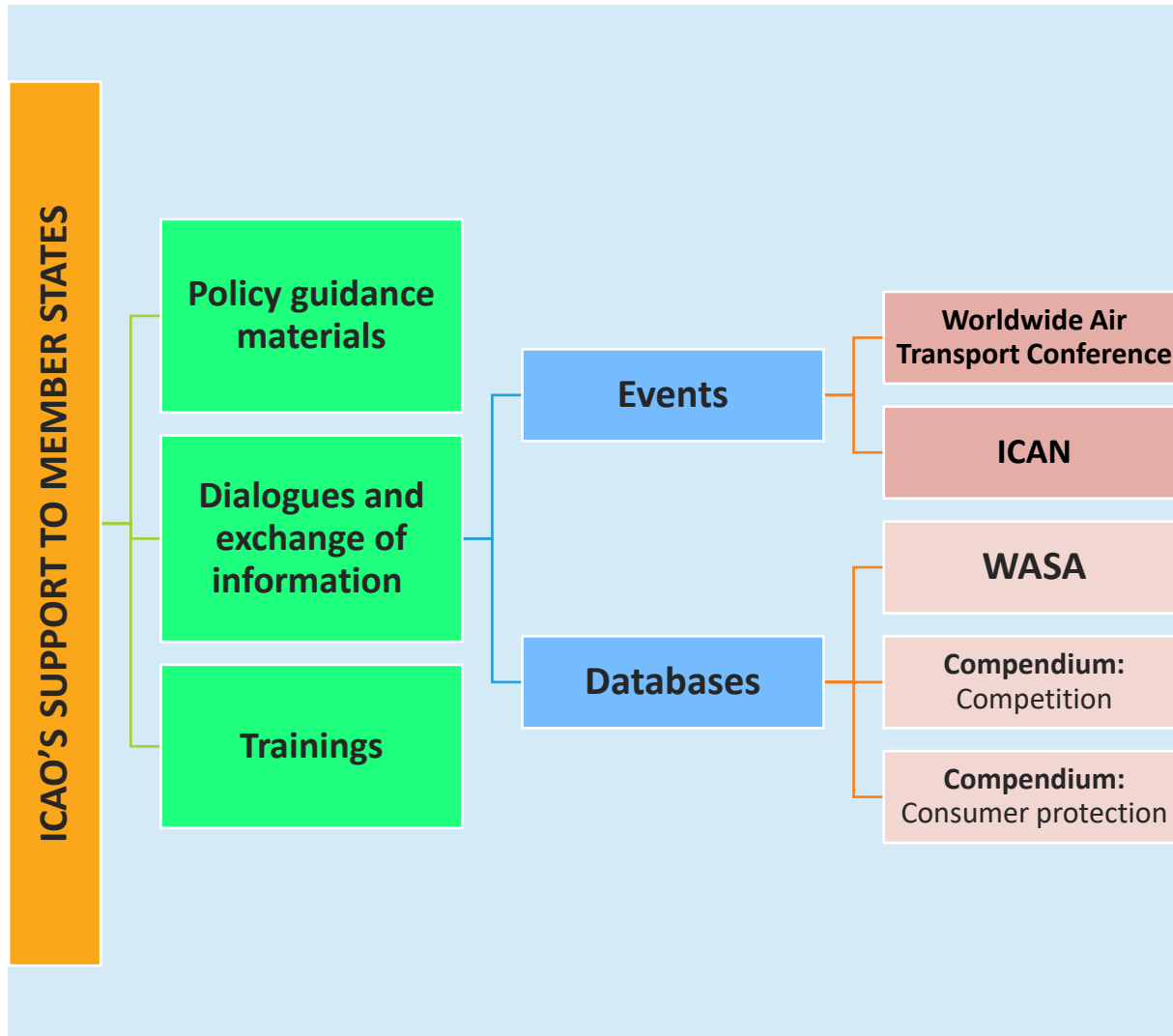
*“We, the Member States of the International Civil Aviation Organization, resolve to actively pursue the continuous liberalization of international air transport to the benefit of all stakeholders and the economy at large.*

*We will be guided by the need to ensure respect for the highest levels of safety and security and the principle of fair and equal opportunity for all States and their stakeholders.”*

The 41st Session of the Assembly urged 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.

# Air Transport Policy and Regulation

Ensuring that international air transport services may be developed in an orderly, regular, efficient, economical, harmonious and sustainable manner



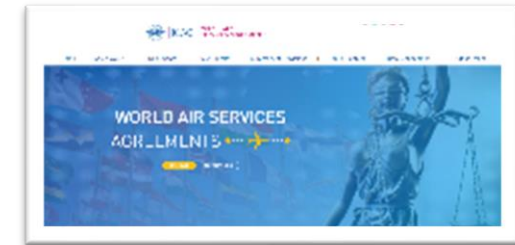
Doc 9587



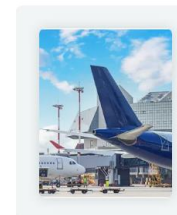
Doc 9626



Doc 8632



Self-paced Training  
Air Transport Economics (ATE)  
Offered in English only



Self-paced Training  
Air Transport Economics for  
Airport Professionals



Self-paced Training  
Air Transport Regulation (ATR)  
Offered in English only



Self-paced Training  
Air Transport Regulations Issues  
(ATRI)

Note: To add graphic on air cargo online course - pending GAT

# Ongoing works by the Air Transport Regulation Panel (ATRP)

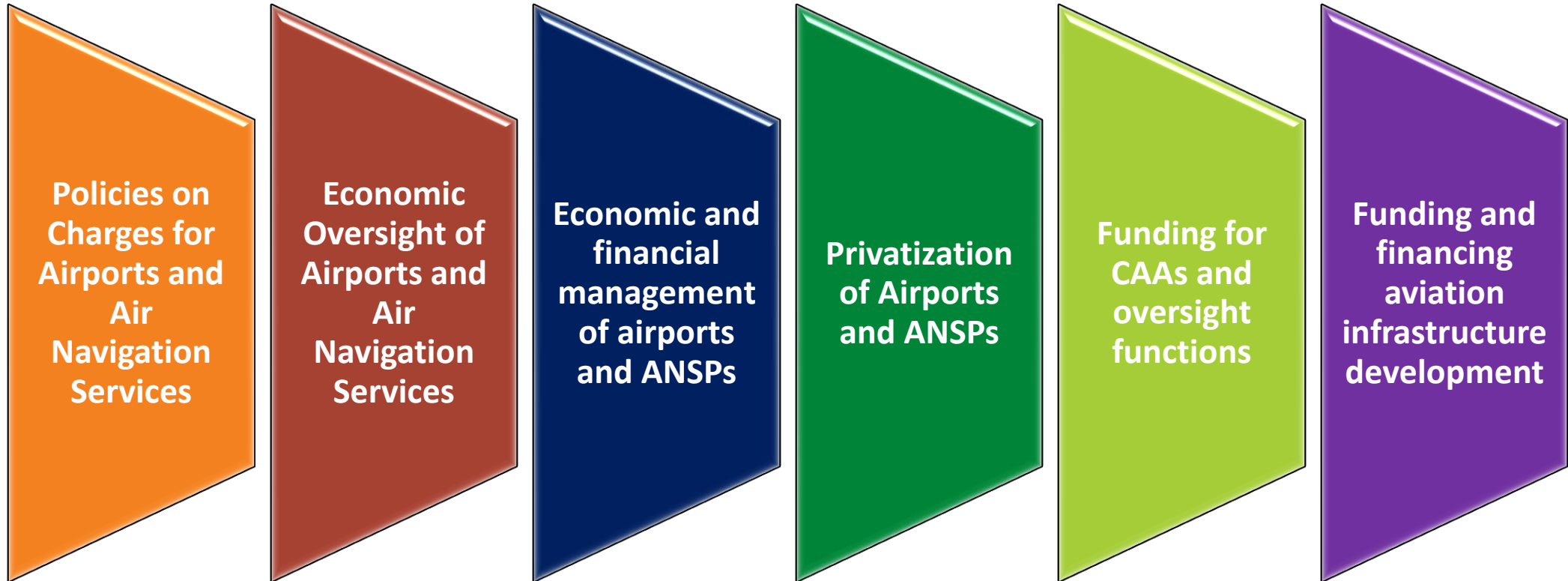
✈ Recommendations of the Seventeenth Meeting of the ATRP (ATRP/17)



# Aviation Infrastructure Management

# Aviation Infrastructure Management

Promoting the efficient development of aviation infrastructure



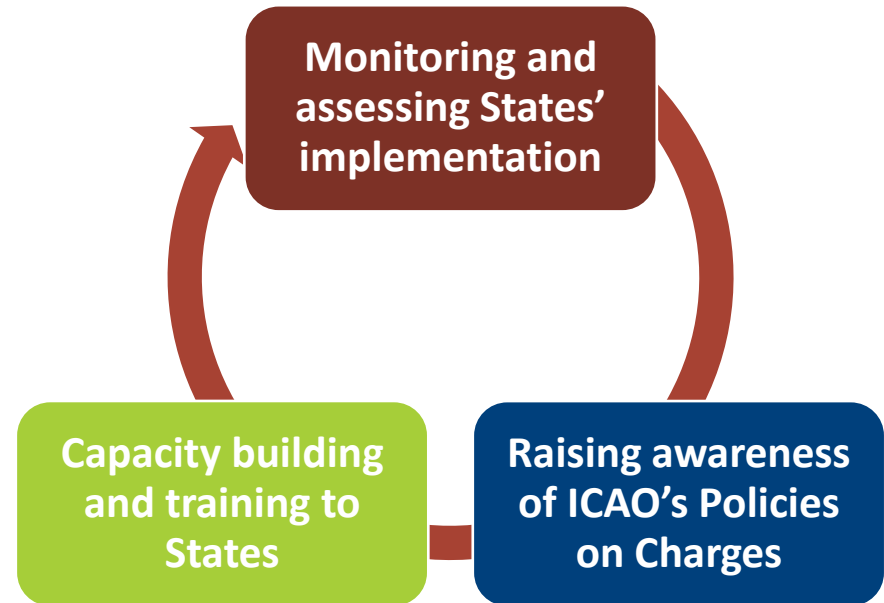
# ICAO's policies and guidance on infrastructure management and implementation support



**Doc 9082**

**Doc 9562**

**Doc 9161**



**Doc 9980**

**Doc 10170**

- **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
- **Doc 10170** – Manual on Economic and Financial Analyses for Aviation Infrastructure Projects

# Ongoing Activities of the Airport Economics Panel and Air Navigation Services Economics Panel (AEP-ANSEP)

## Recommendations of the Ninth Joint Meeting of AEP-ANSEP

Charging policies	Article 15 of Chicago Convention	Enhance the implementation of ICAO policies	Sustainable funding for CAA	Funding for UAS, AAM	Cost recovery of MET services	Invoicing of air navigation service charges	Economic oversight of transnational airports
<ul style="list-style-type: none"><li>• Update of ICAO's Policies on Charges for Airports and Air Navigation Services (Doc 9082)</li><li>• Definitions for the key charging principles</li></ul>	<ul style="list-style-type: none"><li>• Incorporate Article 15 in Doc 9082, particularly concerning the issue of fees and charges for granting access to airspace</li></ul>	<ul style="list-style-type: none"><li>• Global survey to assess the status and challenges faced by States</li><li>• Training and regional workshops</li></ul>	<ul style="list-style-type: none"><li>• Global survey on sustainable funding for oversight functions</li></ul>	<ul style="list-style-type: none"><li>• Economic aspects and potential funding mechanisms for UAS and AAM</li></ul>	<ul style="list-style-type: none"><li>• Collaborate with METP to address cost recovery for MET services</li></ul>	<ul style="list-style-type: none"><li>• Guidance on invoicing air navigation services charges</li></ul>	<ul style="list-style-type: none"><li>• Economic oversight of airports owned by foreign entities</li><li>• Standalone document of "black swan" events</li></ul>

# ICAO's support to States

# ICAO's capacity building support to States

## Online training

Air Transport Regulation online course

Air Transport Regulation Issues online course

Air Transport Economics online course

Air Transport Economics for Airport Professionals course online

Introduction to Air Cargo Economics

## Classroom/Virtual training

Joint ICAO-ACI training on Airport User Charges

## Regional workshop/seminar

*ICAO-AFCAC validation and stakeholder's sensitization workshop on the draft Template Economic Regulation for African States*



---

Thank You!