



**INTERNATIONAL
CIVIL AVIATION
ORGANIZATION**





Directors General of Civil Aviation – Middle East Region Eighth Meeting (DGCA-MID/8)

Doha, Qatar, 26 – 28 October 2026

ICAO

Agenda Item 9: Economic Development of Air Transport
Air Transport Updates



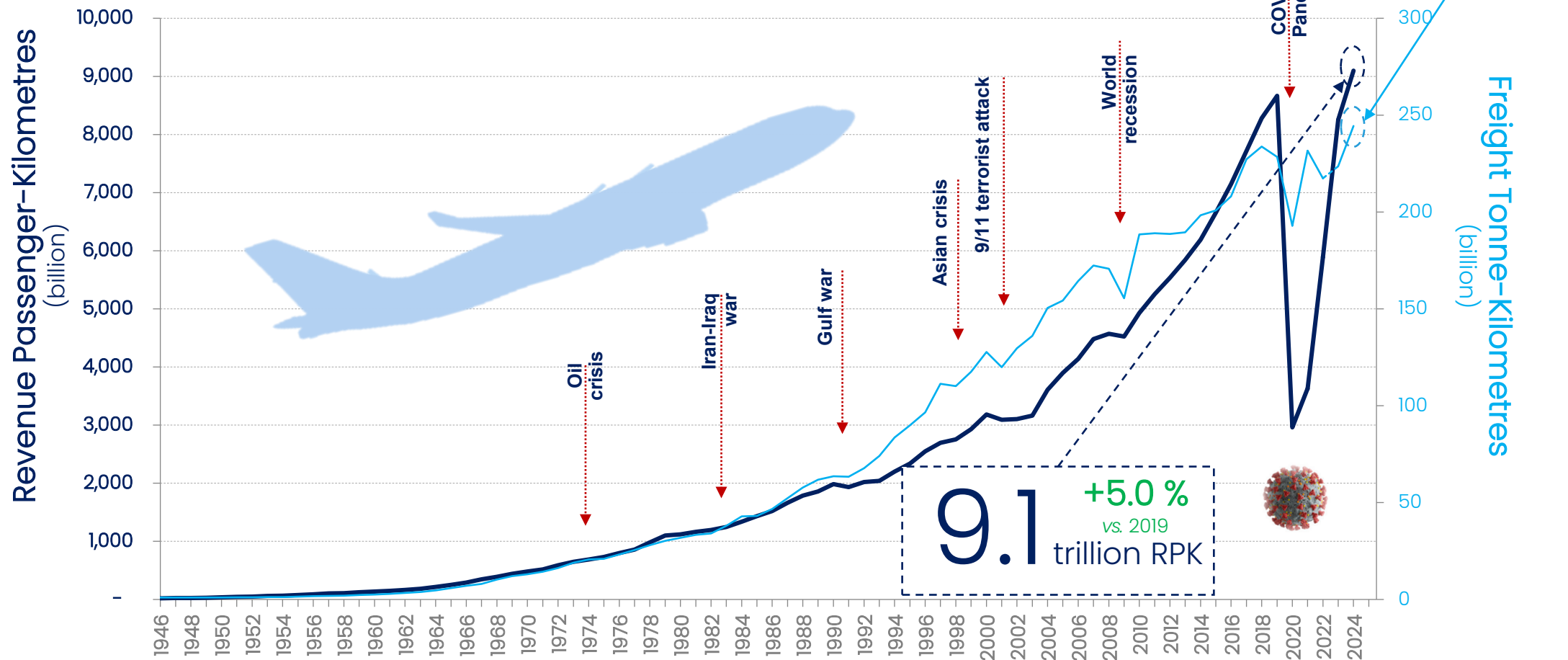
01

STATE OF INDUSTRY

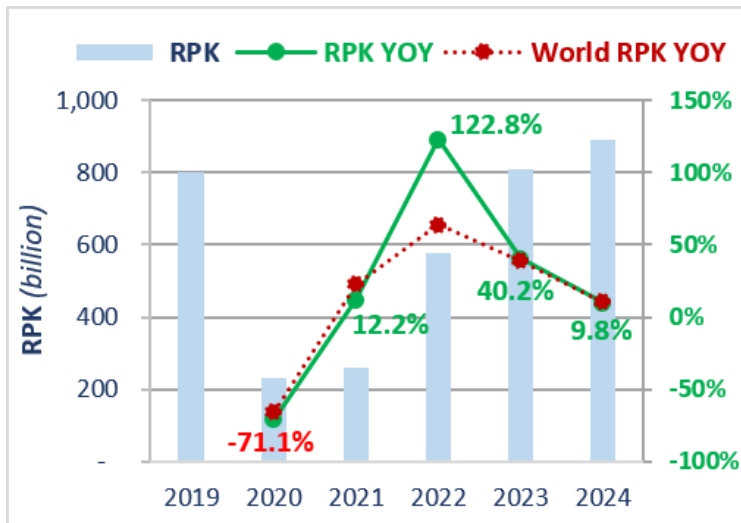


Aviation Data and Analysis

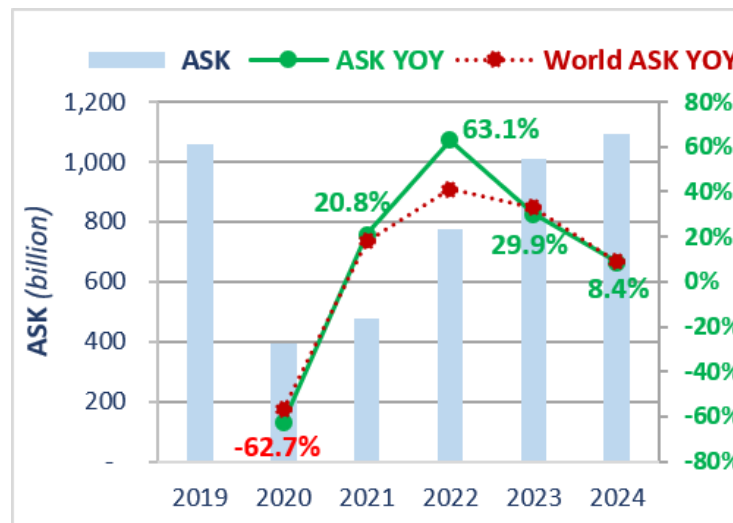
Global traffic: Growth after the pandemic shock



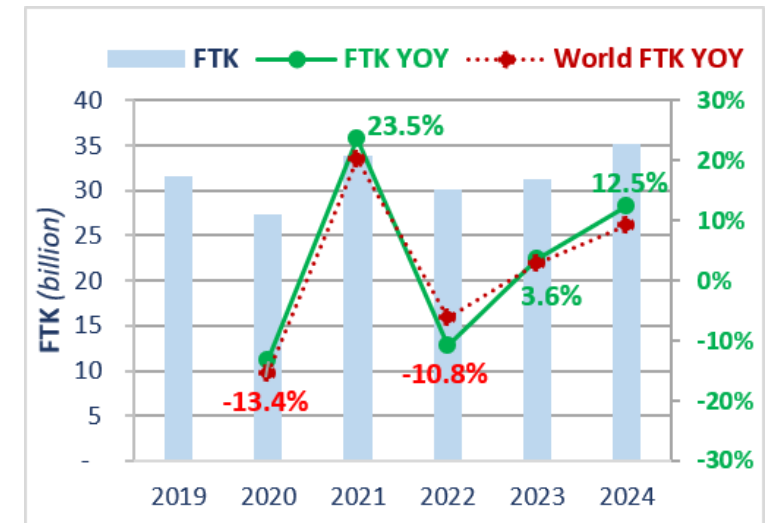
MID Traffic Trends



- Passenger traffic in Revenue Passenger-Kilometres (RPKs) of MID increased by +9.8% in 2024, surpassing the pre-pandemic level.



- Seat Capacity in Available Seat-Kilometres (ASKs) of MID increased by +8.4% in 2024, surpassing the pre-pandemic level.



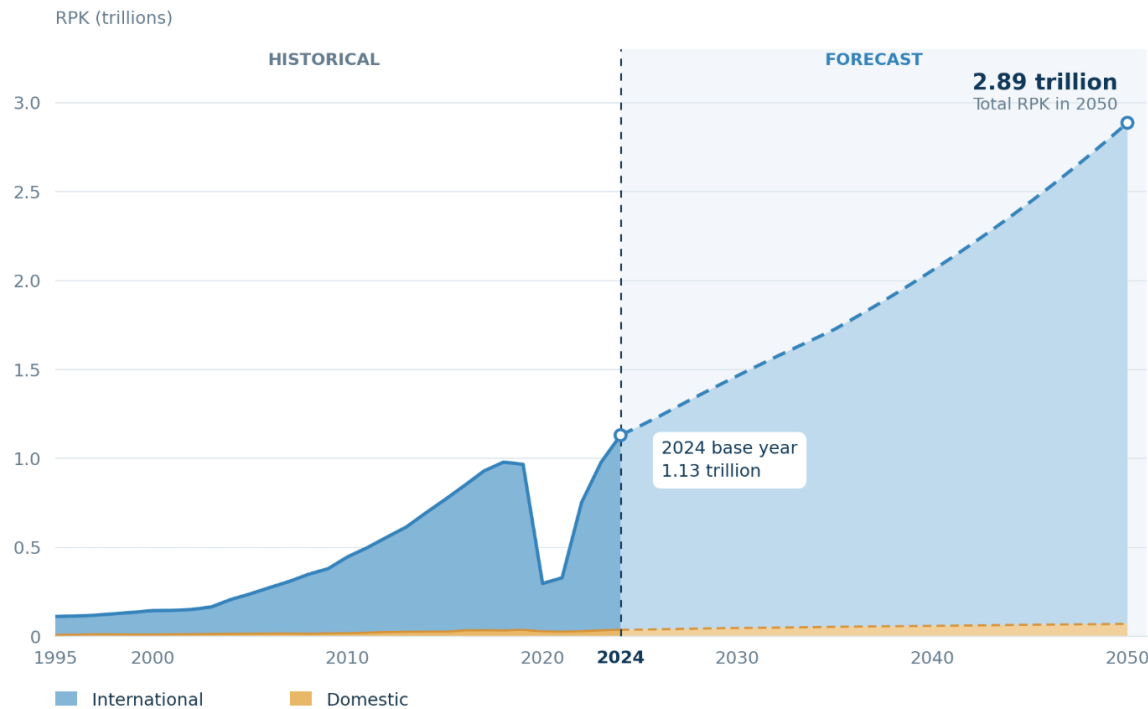
- Cargo traffic measures in Freight Tonnes-Kilometres (FTKs) of MID increased by +12.5% in 2024.

Source: ICAO Air Transport Reporting Form A and AS (Official Statistics reported by Member States)

Long Term Traffic Forecasts (MID)

Middle East passenger traffic

Historical RPK and long-term forecast to 2050



- Passenger traffic (RPK) CAGR* 2025-2050 forecast is 3.7%, 2.5% and 3.7% for international, domestic and total, respectively.

Outcome of ADAP/5



Fifth Meeting of the Aviation Data and Analysis Panel

Panel noted progress, gave technical guidance and endorsed methods for ICAO data and analysis



1. Outcome of the 42nd Assembly

- Policy basis for the ADAP/5 work programme
- Statistics, big data, AI, forecasting, economics



2. Big Data for aviation

- Integrate official statistics with ADS-B / MIDT
- Timely monitoring; support to CAEP and CORSIA



3. Long-term traffic forecasts

- Review of methodology and assumptions
- Customized forecasts for States



4. Aviation Competitiveness Index

- Framework: indicators, data, PCA method
- For peer learning, not public ranking



5. AI to enhance access to ICAO data

- Develop and test AI / LLM use cases
- Natural-language querying of ICAO data



6. Aviation Satellite Account

- Guidance to finalize the ASA framework
- Measure aviation's economic contribution



7. Gender statistics in the workforce

- Scope of gender workforce data
- Minimize State reporting burden

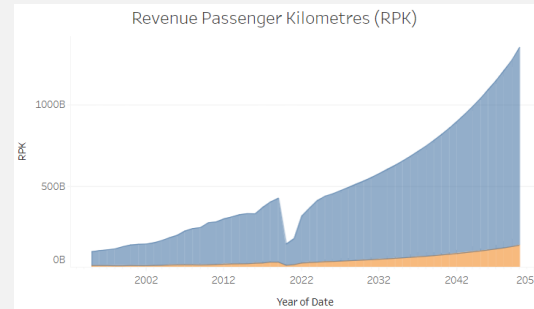
The work on Aviation Data and Analysis

Official aviation statistics
with big data sources



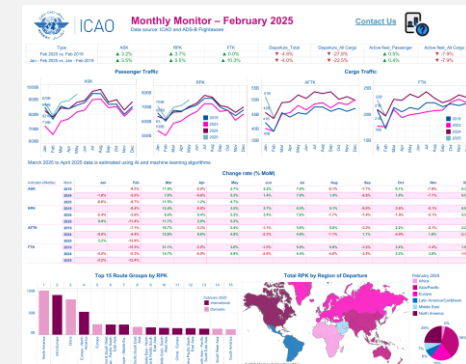
ICAO provides comprehensive official air transport statistics, analytics, and forecasts validated at the government level.

Long-term traffic forecast



A strategic tool for long-term planning, capacity building, and investment prioritization.

Monthly Monitor report
and Dashboard



A wide array of traffic analysis with operational data - aircraft departures, active fleet and movements made as well as short-term projection.

The work on Aviation Data and Analysis (Continued)

Global Aviation Competitiveness Index



Allow to assess and benchmark their performance across key dimensions.

Basic Airmail Conveyance Rate



A key mechanism under the Universal Postal Union (UPU) for settling international mail transport costs.

Analysis of aviation personnel by gender



To raise awareness of the still significant aviation gender gap, which will lead to better policy making.



02

AIR TRANSPORT LIBERALIZATION AND REGULATION



Air Transport Liberalization and Regulation



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

- A42 continue to give regard to and apply this principle in policy-making and regulatory practices
- The 18th ICAO Air Services Negotiation Event (ICAN) 2026 will be held from 7-11 December 2026 in Malabo, Equatorial Guinea



ICAO Template Air Services Agreement (TASA)

- TASA is currently being reviewed to provide flexible options to Member States in supporting their bilateral and multilateral air services negotiations



Economic Guidance on International Operations of Unmanned Aircraft System (UAS)

- Under Resolution A42-26, the Council was tasked with monitoring developments in the UAS sector and strengthening the exchange of information among Member States on related economic regulatory matters
- This work is being carried forward by the ATRP



Article 15 of the Chicago Convention

- The Economic Commission at A42 noted the ATRP, AEP and ANSEP's collaborative work on Article 15 and agreed to refer the guidance material, draft State letter and process for the Council to review issues related to A15 to the Legal Committee, where review is currently underway



03

TAXATION IN THE FIELD OF INTERNATIONAL AIR TRANSPORT



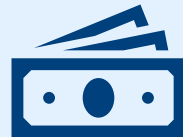
Taxation in International Air Transport

UN International Taxation Framework



UN Model Taxation

UN Framework Convention on International Tax Cooperation



Developments under both the UN Model Taxation and the UN Framework Convention on International Tax Cooperation may have significant implications for the taxation of international air transport, particularly with respect to the allocation of taxing rights between States.



At A42, Member States expressed concerns that approaches departing from the residence-based taxation principle could lead to double taxation, market distortions and adverse impacts on air services, trade and tourism.



Consistent with Assembly Resolution A42-26, Member States are encouraged to apply ICAO's Policies on Taxation in the Field of International Air Transport (Doc 8632), particularly to avoid double or discriminatory taxation.



Following the fifth session of the Intergovernmental Negotiating Committee on the UN Framework Convention on International Tax Cooperation (INC Tax), ICAO submitted inputs to INC Tax, emphasizing consistency with the Chicago Convention and ICAO policies on international air transport taxation.



ICAO continues to monitor these developments and assess their implications for international air transport.



04

INFRASTRUCTURE MANAGEMENT / AIRPORT AND AIR NAVIGATION SERVICES ECONOMICS



Infrastructure management / Airports and Air Navigation Services Economics

ICAO Policies on Charges

- Surveying States to assess implementation of Doc 9082, identify challenges, and inform further ICAO assistance and work

Sustainable Funding for CAAs

- Developing a global survey on funding mechanisms for States' oversight functions and CAAs, with a view to developing guidance

Charging Framework for New Airspace Entrants

- Potential cost recovery and charging framework for the provision of airports and ANS services to UAS, AAM
- Charging mechanisms for the provision of ANS services to commercial space operations

Article 15 of the Chicago Convention

- Supporting the Legal Study Group's review of Article 15 material, with results to be reported to the Legal Committee in October 2027

Other ongoing work

- Developing a survey on economic oversight of transnational/ supranational airport ownership
- Collaboration with the Meteorological Panel on cost recovery for aeronautical meteorological services



05

CONVENING OF THE ATCONF/7



Worldwide Air Transport Conference





ATConf/7 Theme



ICAO



“Air Transport: Powering Global Connectivity, Economic Development, and Resilience in a Dynamic World”

ATConf/7 Objectives

20

01

Advance economic regulatory frameworks to adapt to evolving market trends and technologies by leveraging data

02

Enhance industry resilience by addressing workforce, supply chain, market access, emergency response gaps, and consumer protection

03

Mobilize blended financing to support civil aviation infrastructure

04

Shape economic policy foundations for innovation and emerging technologies

05

Strengthen institutional and human capacity

06

Enable sustainable and inclusive growth in air transport

Agenda Items



Conference Format



01

Plenary Sessions with
thematic interactive
discussions



02

Daily panel discussion and
Experts presentations.



03

Consideration of Working
Papers.



04

Parallel side events including
side Sky Talks and Exhibitions

ATConf/7 Conference Format

PLENARY SESSIONS				
Day 1	Day 2	Day 3	Day 4	Day 5
Agenda Item 1 <i>(Setting the Scene)</i> <i>Overview of developments in the field of air transport</i>	Agenda Item 2 <i>Fostering aviation growth and air connectivity through investments in infrastructure, human capital and partnerships</i>	Agenda Item 3 <i>Strengthening regulatory and institutional frameworks</i>	Agenda Item 4 <i>Emerging technologies, new business models and other associated aspects</i>	End of ATConf/7 (Half a day)
1.1 ATConf/7 Opening Ceremony	2.1 Presentations by stakeholders (Experts from financial institutions, airports, air nav., airlines, CAAs, etc.) on funding and financing needs of the industry	3.1 Presentations or Experts round table discussion on the key subject matter of the day	4.1 Presentations or Experts round table discussion on the key subject matter of the day	5.1 Approval of ATConf/7 draft report and Closing Ceremony
1.2 Industry Experts round table discussion on the overview of the industry since ATConf/6			4.2 Consideration of working papers	5.2 Adoption of Ministerial Declaration
	2.2 Consideration of working papers	3.2 Consideration of working papers	43rd Session (Extraordinary) of the ICAO Assembly	43rd Session (Extraordinary) of the ICAO Assembly

ATConf/7 Next Steps



Thank You

