Partnering for a safe, secure and inclusive Aviation System in the MID Region

ICAO DG Meeting 1-3 November

IATA

Outline

Welcome and Introduction

Industry Economics and MID Region
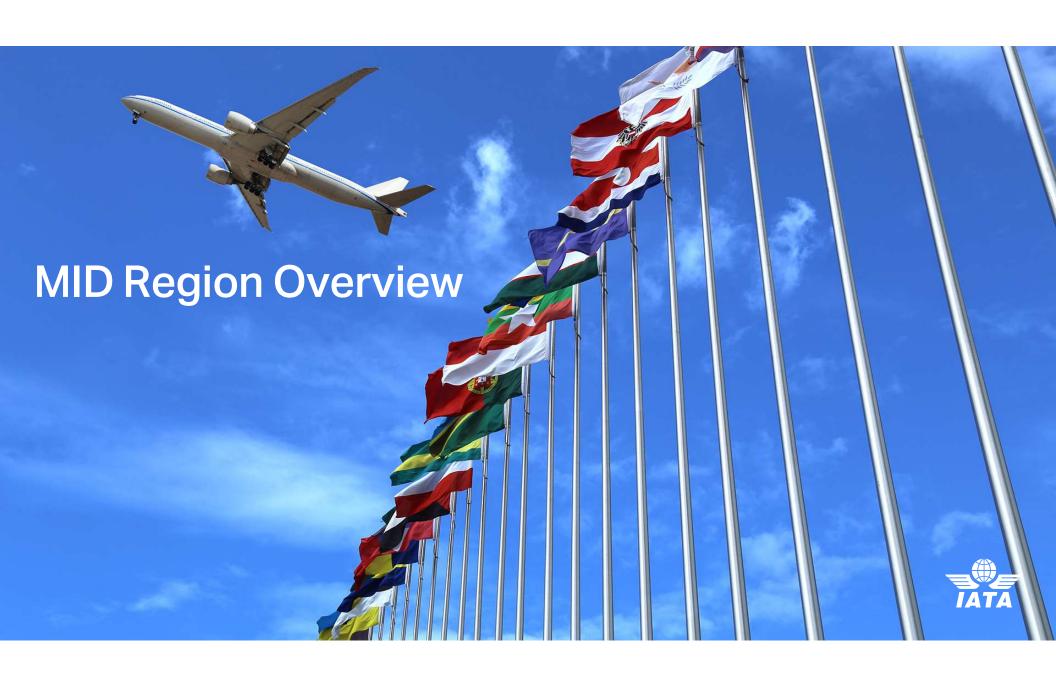
Overview ICAO NCLB

Where IATA can support ICAO

Additional Value by IATA

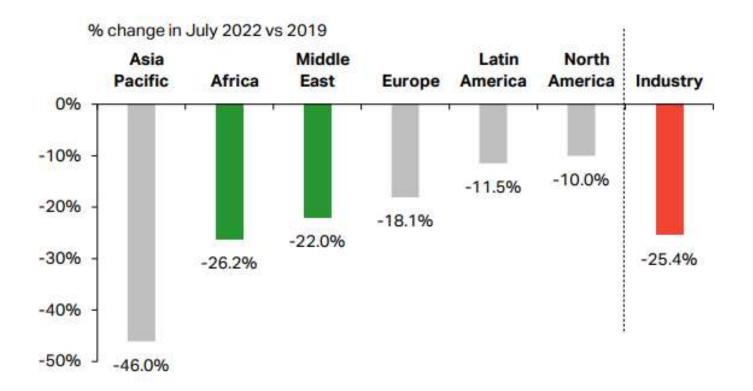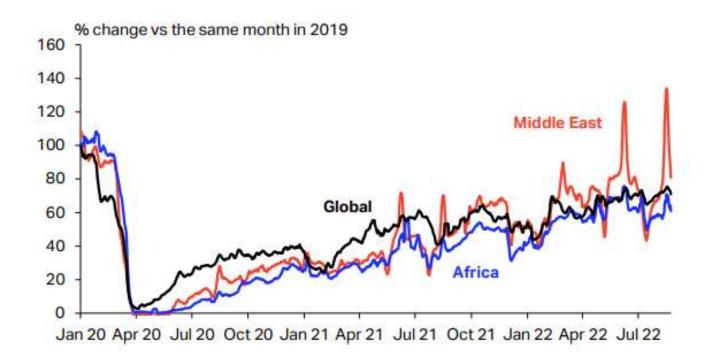IATA Pledge & Proposed Way Forward

Closing Remarks

MID Region Overview

IATA Economics Slide on MID Region

Growth in RPKs by region

% change in July 2022 vs 2019

	Asia Pacific	Africa	Middle East	Europe	Latin America	North America	Industry
	-46.0%	-26.2%	-22.0%	-18.1%	-11.5%	-10.0%	-25.4%

Source: IATA Monthly Statistics   31 October 2022

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Ticket bookings, by region (7 day moving average)

% change vs the same month in 2019

Middle East

Global

Africa

Jan 20 Apr 20 Jul 20 Oct 20 Jan 21 Apr 21 Jul 21 Oct 21 Jan 22 Apr 22 Jul 22

Source: IATA Economics based on DDS data   31 October 2022

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Aircraft deliveries in 2018-22

Aircrafts delivered
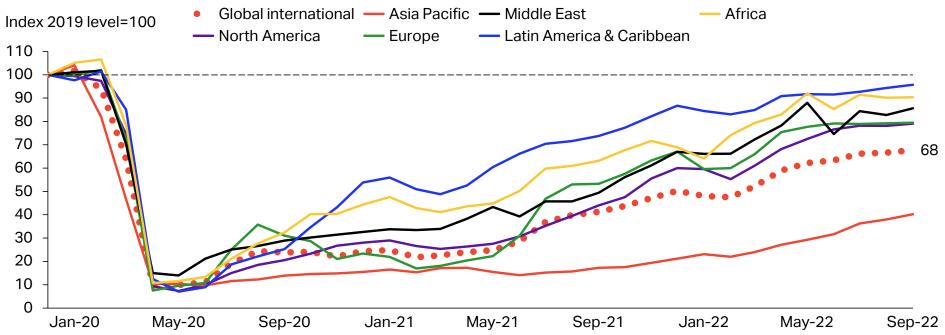
Legend: Africa, Middle East

Source: IATA Economics using data from Cirium Fleet Analyzer

31 October 2022

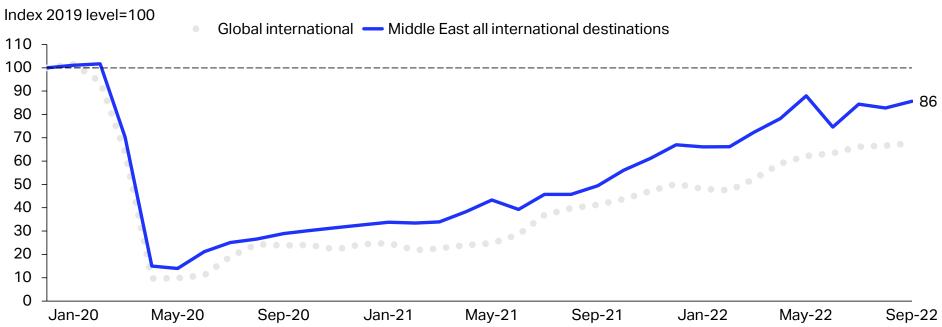# International air connectivity recovery by Sep 2022 varies significantly across regions

IATA International Air Connectivity Index by region for all international routes, monthly Jan 2020-Sep 2022

Legend:
- Global international
- Asia Pacific
- Middle East
- Africa
- North America
- Europe
- Latin America & Caribbean

Index 2019 level=100

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TC04 OAG_20210914

Middle East total international air connectivity in Sep 2022 is 86% of pre-crisis levels

IATA International Air Connectivity Index, monthly Jan 2020-Sep 2022

Index 2019 level=100

Legend: Global international · Middle East all international destinations

IATA Connectivity Index using data from OAG
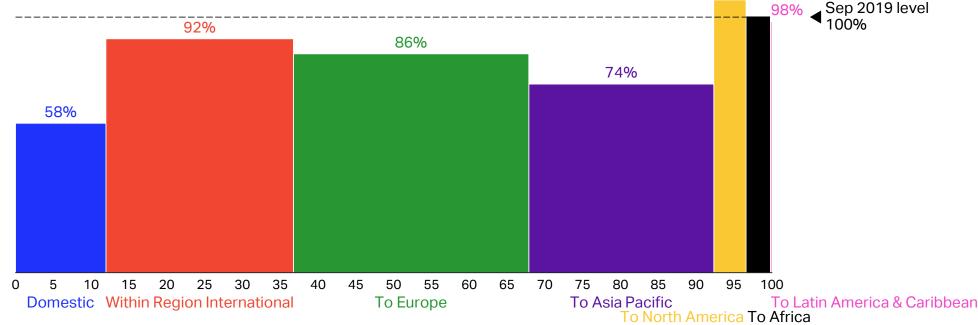
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TC07 OAG 20210914

Extent of recovery to Sep 2019 connectivity for Middle East by Sep 2022

Middle East connectivity recovery by route area in Sep 2022 as % of Sep 2019 level
Horizontal scale shows proportion of Sep 2019 connectivity contributed by each route area

IATA Connectivity Index using data from OAG

TC09 OAG_20210914

Challenges

Select states continue to face Challenges

- Many States still coping with the onslaught of the pandemic and fragmented recovery of the aviation industry

- Volatile Traffic Recovery

- Staff retention, shortages, upskilling/training and changes in workforce dynamics

- Geopolitical instability

- High Energy Prices and Inflation

- Unstable political regimes affecting Governance and Regulatory oversight

- Lack of Resources

- Inability of Governments to prioritize aviation

- Challenging Security environment

Despite the Challenges ICAO has continuously led the way through the No country left behind initiative!

ICAO has continuously led NCLB efforts

No Country Left Behind – enabling all States to Safe reliable air transportation services

NCLB for All States and ICAO objectives

Benefits of aviation for sustainable growth, connectivity and economic prosperity

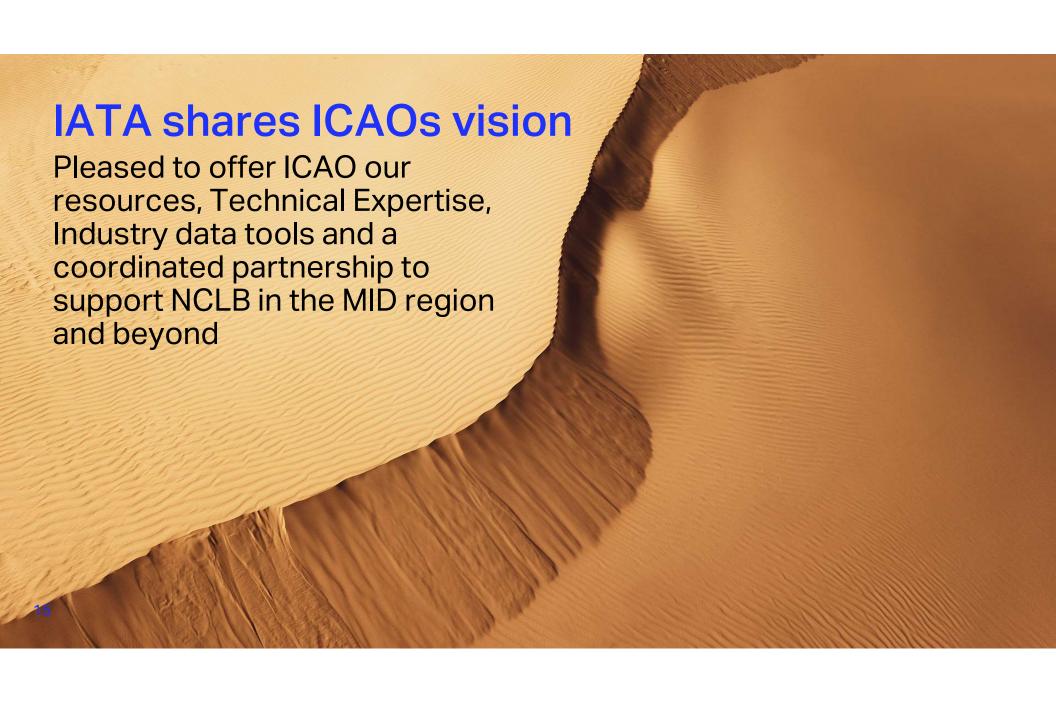Assist States with awareness and implementation of SARPs

Collaboration with Industry partners to achieve objectives

Enhancing aviation safety, security and capacity building

Providing tools and mobilizing resources

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IATA shares ICAOs vision

Pleased to offer ICAO our resources, Technical Expertise, Industry data tools and a coordinated partnership to support NCLB in the MID region and beyond

IATA would be pleased to support ICAO:

	Capacity Building & Technical Assistance to States	

ATM	Airports Master Planning, Development Advisory & Aerodrome Certification	Ground Operations	Environment & Sustainability	IATA would be pleased to offer Technical Expertise, IATA resources and tools to support ICAO with State missions as part of NCLB agenda Especially in struggling locations
Safety & Air Navigation Capacity and Efficiency	Security & Facilitation	Cargo & Safety	Air Transport Regulations and Governance	

Besides IATA Technical Expertise what we bring

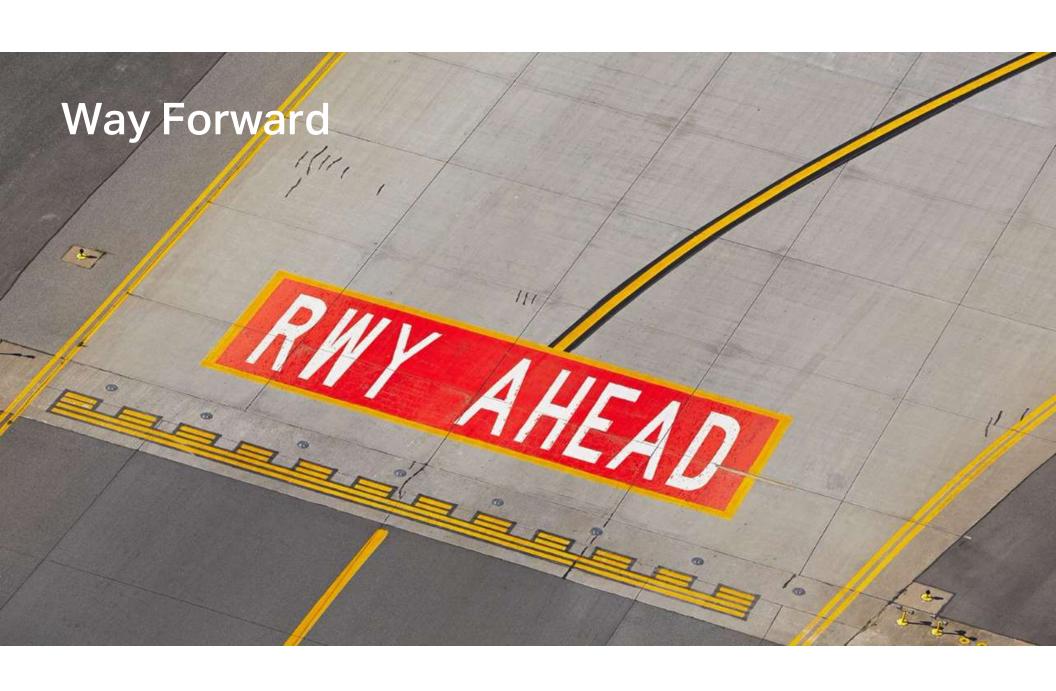|	
Airline Member Perspective and Insights	Ability to leverage IATA commercial programs and training portfolio to assist States NCLB
Industry leading Business Intelligence, Economics Forecasts and Data solutions	Support States with both guidance material, tools and implementation
Pool of well trained regional and global subject matter expertise	Access to IATA working groups, innovation accelerators and Industry Forums
Access to wide Industry partners beyond States and Airlines, Cargo, Ground Handling, Fuel, Security, Airports, Vendors & Agencies	Customer Centric regional team acting as a One Stop Shop for all IATA assistance based in Middle East

Dedicated Team which is based in the Middle East region

Way Forward

Proposed Next Steps

- Establishment of an ICAO MID – IATA AME Project Steering Group

- Memorandum of Understanding or Partnership framework between IATA committing to support Aviation and Air Transport Capacity Building in the MID region

- Identify prioritize projects by ICAO and where IATA could potentially contribute

- Map Stakeholders with clear projects and accountability and deliverables by IATA

- Nominate IATA Champions to program manage, deliver and roll out plans to support ICAO

- Engage regional States under the leadership of ICAO, foster collaboration with IATA members and Industry partners to support Capacity Building initiatives and technical missions

Proposed Leadership Team

IATA Regional POC	IATA Leadership & Oversight
Kashif Khalid: Regional Director, Airports, Passenger, Cargo, Security, Ground Operations, and Facilitation - Africa and the Middle East khalidk@iata.org **Sharron Caunt**: Regional Director, Safety & Flight Operations – Africa & Middle East caunts@iata.org XXX	**Kamil Al Awadhi:** Regional Vice President, IATA Africa & Middle East alawadhik@iata.org

Thank You!

IATA