



International Civil Aviation Organization

MIDANPIRG STEERING GROUP

Fourth Meeting (MSG/4)
(Cairo, Egypt, 24 - 26 November 2014)

Agenda Item 4: MID Region Air Navigation Planning

MID REGION STATISTICS AND FORECASTS

(Presented by the Secretariat)

SUMMARY

This paper presents the state of air transport in the MID Region, the main conclusions of the Fourth meeting of the MIDANPIRG Traffic Forecasting Sub Group and the outcome of the ICAO Aviation Data Analyses Seminar (Cairo, Egypt, 27 - 29 October 2014).

Action by the meeting is at paragraph 6.

REFERENCES

- Report of the Fourth Meeting of the MIDANPIRG Traffic Forecasting Sub-Group
- Summary of Discussion of the ICAO Aviation Data Analyses Seminar (Cairo, Egypt, 27 - 29 October 2014)

1. INTRODUCTION

1.1 The development of forecasts for major traffic flows from, to and within the MID Region that also includes Peak Period analysis and other planning analyses is necessary to support regional air navigation planning and implementation processes.

2. STATE OF AIR TRANSPORT IN THE MID REGION

2.1 Air carriers of the MID Region (the 15 Member States to which the MID Office is accredited) recorded the highest annual growth of 11.5 per cent in terms of Revenue Passenger-Kilometers (RPK) on total (i.e. domestic and international services combined) scheduled services in 2013, compared to a 14.0 per cent growth in 2012. This robust growth was supported by the expansion of air carriers such as Emirates, Etihad, Qatar Airways as well as the Low Cost Carriers (LCCs) Air Arabia and flydubai. Those air carriers expanded their network and benefited from their excellent geographical position to link different cities with only one stop in their respective hubs. However, passenger traffic growth was not homogeneous in the region as for instance Gulf Air, the national airline in Bahrain, showed a decrease of -26.8 per cent in 2013. Airlines of the United Arab Emirates, Qatar and Saudi Arabia account for 83 per cent of the total passenger traffic of airlines of the MID Region.

2.2 The airlines of the MID Region showed a stable growth in 2012 and in 2013 in terms of aircraft departures. The total number of scheduled commercial departures in 2013 grew at a pace of 5.8 per cent to reach about 1.2 million departures, compared to a growth rate of 5.6 per cent recorded in 2012.

2.3 International traffic on scheduled services of air carriers in the MID Region represents 94.2 per cent of the Region's total RPK and recorded 11.4 per cent annual growth in 2013. The average passenger load factor lost 0.4 point while establishing at 76.2 per cent in 2013 compared to 76.6 per cent the previous year on international scheduled services.

2.4 The States with a consequent domestic market are Saudi Arabia and the Islamic Republic of Iran. They showed an annual growth of 7.1 per cent and 20.7 per cent, respectively.

2.5 Cargo traffic performed by MID carriers recorded the highest annual growth of 12.3 per cent in 2013 in terms of freight tonne-kilometers (FTK), compared to 14.9 per cent in 2012. Air freight markets performed by MID carriers are almost exclusively international and the United Arab Emirates and Qatar, both accounting for 85.6 per cent of the total freight traffic, recorded annual growths of 16.2 per cent and 15.2 per cent, respectively, on total scheduled services.

3. CONCLUSIONS FROM THE FOURTH MEETING OF THE MIDANPIRG TRAFFIC FORECASTING SUB-GROUP

3.1 The Fourth meeting of the MIDANPIRG Traffic Forecasting Sub Group was held in Cairo, Egypt, 15-17 November 2011. The meeting was presented with a set of updated forecasts for international passenger and aircraft movement traffic to, from and within the MID Region up to the year 2030. According to these forecasts, the passenger traffic to, from and within the MID Region on the five major route groups concerned for the period 2010-2030 is expected to increase at an average annual rate of 9.1 per cent. The Middle East-Africa Route Group is expected to experience the highest average annual growth rate of 10.4 per cent per annum, followed by Intra Middle East, Asia/Pacific-Middle East, North America-Middle East and Europe-Middle East Route Groups with growth rates of 10.3 per cent, 9.2 per cent, 8.8 per cent and 7.3 per cent respectively for the period concerned. The total aircraft movements to, from and within the Middle East Region are estimated to increase from some 976400 in 2010 to slightly above 5204000 in 2030 at an average annual growth rate of 8.7 per cent over the same period.

4. CUSTOMIZED SETS OF FORECASTS TO BE PRODUCED FOR THE TFGs

4.1 In accordance with the outcome of the First Meeting of the Aviation Data and Analysis Panel (ADAP/1), held in Montréal from 14 to 17 April 2014, regarding the development of an ICAO single-set of long-term forecasts, and the impact on the customized sets to be produced for the Planning and Implementation Regional Groups, it is proposed to have one meeting every three years gathering all the TFGs/Regions during one week at the ICAO Head Quarters (HQ). In this respect, it is planned that this meeting be organised in ICAO HQ during the second quarter of 2015, for the development of the customized and/or more detailed forecasts consistent with the single set of forecasts to be developed by the MDWG-LTF.

4.2 In connection with the above, it's to be highlighted that MIDANPIRG/14, through the endorsement of the Seventh Edition of the MIDANPIRG Procedural Handbook, which includes the new MIDANPIRG Organizational Structure (Decision 14/2 refers) approved the dissolution of the Traffic Forecasting Sub Group.

5. ICAO AVIATION DATA ANALYSES SEMINAR

5.1 The ICAO Aviation Data Analyses Seminar has been successfully held in Cairo, Egypt, from 27 to 29 October 2014. 38 participants from 5 States (Bahrain, Egypt, Oman, Qatar and Saudi Arabia) were in attendance. The event was gratefully hosted by the Egyptian Ministry of Civil Aviation. The Summary of Discussions of the Seminar is at **Appendix A**.

6. ACTION BY THE MEETING

6.1 The meeting is invited to:

- a) take into consideration the MID Region Statistics and Forecasts in the regional air navigation planning and implementation processes; and
- b) review the outcome of the ICAO Aviation Data Analyses Seminar (Cairo, Egypt, 27 - 29 October 2014) and take necessary follow-up action, as appropriate.



International Civil Aviation Organization

ICAO Aviation Data Analyses Seminar

(Cairo, Egypt, 27 - 29 October 2014)



SUMMARY OF DISCUSSIONS

1. INTRODUCTION

1.1 The ICAO Aviation Data Analyses Seminar has been successfully held in Cairo, Egypt, from 27 to 29 October 2014. 38 participants from 5 States (Bahrain, Egypt, Oman, Qatar and Saudi Arabia) were in attendance. The list of participants is attached. The event was gratefully hosted by the Egyptian Ministry of Civil Aviation. It was moderated by Mr. Jerome Simon, Infrastructure Manager and Mr. Cyrille Martin, Air Transport Economist, from ATB/EAP, ICAO HQ and supported by Mr. Mohamed Smaoui, Deputy Regional Director, ICAO MID Regional Office.

1.2 The agenda was developed around the main following topics:

1. ICAO Statistics Programme
2. ICAO activities in the field of forecasting
3. Economic incentives for ASBUs including Cost-Benefit Analyses.

1.3 A copy of the detailed Agenda/Work Programme is at **Appendix A**. The Summary of Discussions with all its attachments is available at: <http://www.icao.int/mid/Pages/default.aspx>.

1.4 The main objectives of the Seminar were to focus on ways to improve the quality and quantity of data sent to ICAO and the Civil Aviation Authorities. In this regard, detailed training was provided on the revised ICAO Statistics Programme, which is based on the Recommendations of the Tenth Session of the Statistics Division (STA/10) as well as the results of the First Meeting of the Aviation Data and Analyses Panel (ADAP/1).

2. SUMMARY

2.1 The Seminar provided a training for States on the ICAO Statistics Programme based on the *Reference Manual on the ICAO Statistics Programme* (Doc 9060). All Statistical forms collected by ICAO were presented and detailed explanations were provided.

2.2 The ADAP/1 Recommendations and 38th Assembly Resolutions related to Aviation Data/Statistics and to forecasting, planning and economic analyses were reviewed and re-iterated.

2.3 Practical hand-on exercises on Air Traffic Reporting Forms have been conducted.

2.4 The work of the Multi-disciplinary Working Group on Long-term Traffic Forecasts (MDWG-LTF) for the development of a single set of long-term traffic forecasts has been presented.

2.5 The work of the Multi-Disciplinary Working Group on economic challenges linked to the Aviation System Block Upgrade implementations (MDWG-ASBUs) has been presented.

3. CONCLUSIONS

3.1 States and ICAO should continue to cooperate closely to overcome the difficulties related to the low level of reporting statistic data to ICAO in order to improve the coverage and quality of reporting on ICAO Air Transport Reporting Forms.

3.2 States have been requested to adhere strictly to ICAO reporting instructions and to make use of the appropriate Air Transport Reporting Forms as well as associated electronic tools when reporting data to ICAO.

3.3 States have been urged to nominate focal points for aviation statistics, and to make every effort to provide the statistics required by ICAO in a timely manner and electronically, whenever possible.

3.4 States have been encouraged to support the ICAO Statistics Programme by providing feedback and sharing relevant knowledge and experience.

3.5 There was broad support for the added-value of the Seminar. However, due to the importance of the ICAO Statistics Programme and the complexity of the technical aspects, there was a consensus that the Programme of the Seminar is too busy to be finished in three days. Accordingly, it has been suggested that another Seminar be organized by ICAO within a two year time-frame to keep the momentum, further enhance the technical knowledge of States and address other subjects of relevance, which due to time constraints, have not been addressed in detail during this Seminar.

3.6 ICAO should continue to organize on a regular basis, ICAO Statistics Programme training for Member States in support to the ICAO Strategic Objectives.

4. CLOSING

4.1 During the closing ceremony, the participants expressed their gratitude and appreciation to the Egyptian Ministry of Civil Aviation for the warm welcome, the excellent arrangements made towards successful conduct of the Seminar and outstanding hospitality. Thanks were also conveyed to the ICAOMID Regional Office for the organization of the Seminar, good preparation and coordination; and to the Moderators for their support and professionalism.

ICAO Aviation Data Analysis Seminar Middle East (MID) Regional Office

27 - 29 October 2014



*Economic Analysis and Policy Section (EAP)
Air Transport Bureau (ATB)*

Proposed Agenda

Day 1 - Monday 27 October

08:30 – 08:45 **Opening session**

08:45 – 09:15 **Main goals of the ICAO Statistics Programme (what for?)**

- A Programme aimed at benefiting the civil aviation community by working together.
- An essential tool for managing civil aviation activities
- Principles governing international statistical activities and useful resources

09:15– 09:45 **The ICAO Statistics Programme, a useful tool**

- ICAO Statistics Programme – Introduction
- Manual on the ICAO Statistics Programme

09:45 – 10:15 **The ICAO Statistical Data Base (ISDB) and ICAODATA+ presentation**

10:15 – 10:45 Coffee break

10:45 – 11:30 **Introduction to air transport statistics**

11:30 – 12:00 **Statistics related to air carriers (Forms A, B, C, D, EF, M)**

12:00 – 12:30 **Air Transport Reporting forms for air carrier traffic** (relationships between forms)

12:30 – 13:00 **Air carrier traffic, fleet and fuel consumption (Forms A, B, C, D, M): exercises**

13:00 – 13:30 Coffee break

13:30 – 15:00 **Air carrier traffic, fleet and fuel consumption (Forms A, B, C, D, M): exercises**

Day 2 - Tuesday 28 October

8:30 – 10:15 **Air carrier traffic, fleet and fuel consumption (Forms A, B, C, D, M): exercises**

10:15 – 10:45 Coffee break

10:45 – 11:00 **Air carrier financial data (Form EF): presentation**

11:00 – 11:30 **Air carrier financial data (Form EF): exercises**

11:30 – 11:45 **Quarterly survey on financial parameters of air carriers**

11:45 – 12:00 **Airport traffic (Form I): presentation**

12:00 – 12:45 **Airport traffic (Form I): exercises part I**

12:45 – 13:15 Coffee break

13:15 – 13:45 **Airport traffic (Form I): exercises - part II**

13:45 – 14:30 **Intelligent forms presentation**

14:30 – 15:00 **Air navigation services financial data – Form K**

- Content, instructions, data-entry, data verification and validation, e-mailing, storing, further use.
- *Manual on Air Navigation Services Economics* (Doc 9161).

Day 3 - Wednesday 29 October

08:30 – 09:00 **Commercial air carrier and airport traffic by State - Form A-S and I-S**

- Content, instructions, data-entry, data verification and validation, e-mailing, storing, further use.

09:00 – 09:15 **Role of contacts in States and reporting procedures**

09:15 – 10:15 **ICAODATA+, data extraction and analysis**

10:15 – 10:45 Coffee break

10:45 – 11:15 **ICAO activities in the field of forecasting**

11:15 – 12:30 **Methodology for forecasting air traffic**

12:30 – 12:45 **Presentation of e-learning courses (statistics, forecasting, ...)**

12:45 – 13:15 Coffee break

13:15 – 14:15 **Economic incentives for ASBUs including Cost-Benefit Analyses**

14:15 – 14:30 **Feedback form**

14:30 – 14:45 **Final questions/discussions**

14:45 – 15:00 **Closing session**

LIST OF PARTICIPANTS

NAME	TITLE & ADDRESS
<u>STATES</u> BAHRAIN Mr. Mohamed Abdulaziz Bumeajib	Flight Permission & Schedule Specialist Civil Aviation Affairs P.O. Box 586 KINGDOM OF BAHRAIN Fax: +973 1732 9083 Tel: +973 3992 9592 Mobile: +973 3999 9244 Email: mbumeajib@gmail.com
EGYPT Mr. Ahmed Hamdi Saber	Air Transport Officer Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Tel: 202 26175071 Mobile: +2 0100 1453401 Email: a.hamdy1986@yahoo.com
Mr. Ahmed Helmy Gharib	Aviation Safety General Manager Cairo International Airport Cairo Airport-Village Road Cairo-EGYPT Mobile: +2 01002522779 Email: rmhemly65@gmail.com
Mr. Adel Taher Srhan	Second English Translator Central Administration of Quality 8 Nazif St., Cairo-EGYPT Tel: 202 352638 Mobile: +2 01005066890 Email: adeltaher51@yahoo.com
Capt. Amr A. Mageed	Safety and Quality General Manager Egyptair Domestic and Regional Airlines Egyptair Admin. Complex Cairo-EGYPT Fax: 202 26964008 Tel: 202 26964036 Mobile: +2 01065016610/01111166261 Email: a.abdelmagid@egyptair.com

NAME	TITLE & ADDRESS
Mr. Ayman Ibrahim Abdel Hafeez	Coordinator International Affairs Department Cairo Airport Road Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Fax: 202 22685420 Mobile: +2 0100 5289310 Email: ayman_ib_@hotmail.com
Dr. Awad Khir Eldin	Senior Air Traffic Controller Operations Technical Bureau Cairo-EGYPT Tel: 202 22655202 Mobile: +2 012 24860607 Email: awad_khir@yahoo.com awad.khirelden@cairo-airport.com
Mr. Ahmed A/Khalek Ibrahim	Flight Data Analysis Manager Egyptair Admin. Complex South Building Cairo-EGYPT Mobile: +2 0100 1252550 Email: elahmed2000@hotmail.com
Mrs. Dina Hassan Khater	Statistics Specialist Ministry of Civil Aviation Complex, Egyptian Airports Company Cairo International Airport Cairo Airport Road Cairo - EGYPT Mobile: +2 0111 7074798 Email: dinakhater82@gmail.com
Mr. Ehab Galal Ahmed Hamouda	Quality Assurance Manager Egyptair Express Egyptair Complex Building Cairo Airport Road Cairo - EGYPT Fax: 202 26964006 Tel: 202 26964006 Mobile: +2 01001630375 Email: ehab-hamouda@egyptair.com

NAME	TITLE & ADDRESS
Capt. Elias Sadek	V.P. Safety and Quality Egyptair Holding Company Admin. Complex South Building Cairo Airport Road Cairo - EGYPT Fax: 202 26963854 Tel: 202 26963850 Mobile: +2 01275555445 Email: safety.quality@egyptair.com
Mr. Fayez Eissa Mohamed	Director of Statistical Department Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Tel: 202 44751148 Mobile: +2 01283609632 Email: fayezesa@yahoo.com
Mr. Gamal El-Deen Mettwally	Safety and Quality General Manager Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Egyptair Holding Company Admin. Complex South Building Cairo Airport Road Cairo - EGYPT Mobile: +2 01001700261 Email: haly60@yahoo.com
Mrs. Hanan Said Zeidan	Flight Safety Specialist Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Mobile: +2 01113703553 Email: maruam-1969-69@yahoo.com
Mrs. Heba Allah Ahmed Abdel Ghani	Decision Making Support Specialist Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Fax: 202 22663437 Mobile: +2 01005283521 Email: happyymah@yahoo.com

NAME	TITLE & ADDRESS
Mrs. Heba Mohamed Nadim	Chief Section of Foreign Department of Air Transport Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Mobile: +2 01097018149 Email: heba_nadim@hotmail.com
Eng. Hesham Mohamed Ismail	ATC Automation Engineering Programs Manager National Air Navigation Services Company (NANSC) Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Fax: 202 22685293 Tel: 202 22657947/22657950 Mobile: +2 01001690290 Email: ahsn_ism@hotmail.com
Ms. Heba Mostafa Mohamed	Senior of AIS Technical Coordinator (Air Navigation Aerodromes Safety Statistics) Civil Aviation Ministry Ministry of Civil Aviation Cairo Airport Road Cairo - EGYPT Fax: (202) 2268 5420 Tel: (202) 2417 5389 Mobile: (2014) 7222395 Email: heba.mostafa1@hotmail.com
Mrs. Lamia Sami Mahrous	Coordinator, International Affairs Department Ministry of Civil Aviation Cairo Airport Road Cairo - EGYPT Fax: 202 2268 5420 Mobile: +2 01065332312 Email: lamia-civilaviation@hotmail.com
Mrs. Maha Mahmoud Abdel Hadi	IT Specialist Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Fax: 202 22663437 Tel: 202 26078232 Mobile: +2 01060002373 Email: toto1383@yahoo.com

NAME	TITLE & ADDRESS
Eng. Mostafa Attia Aly Kaoud	Information and Decision Support Manager National Air Navigation Services Company (NANSC) Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Mobile: +2 0122 8839963 Email: mkaoud@gmail.com
Mrs. Maha Khafaga Mohamed Abd El Latif	Third English and Japanese Translator At Ministry of Civil Aviation 81 Sherif St., Cairo-EGYPT Tel: 202 5551188 Mobile: +2 01095539191 Email: maha_khafaga_28@hotmail.com
Mr. Mohamed Abdel Maksoud Lotfy	Air Traffic Controller Ministry of Civil Aviation Complex Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Mobile: +2 01002022154 Email: elshimy-lawer@yahoo.com
Mr. Mahmoud Abdallah Mahmoud	Air Transport Officer Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Mobile: +2 01007668809 Email: mahmoudabdallah43@yahoo.com
Mr. Nabeel Ahmed Shawky Amin	Safety Department Manager Egyptian Airports Company Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Fax: 202 22683951 Tel: 202 26969600 ext. 2100 Mobile: +2 01006527899 Email: nabeel_shawky@yahoo.com nabeel.shawky@eac-airports.com

NAME	TITLE & ADDRESS
Mrs. Nermeen Ahmed Atef	Air Transport Inspector Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Mobile: +2 01159322770 Email: nfeps@windowslive.com
Mr. Osama Mohamed El Komi	Air Traffic Controller Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Mobile: +2 01000174797 Email: samo_samo162@hotmail.com
Mr. Osama Sayed Hussein	Schedule Planning & Analysis Manager Egyptair Airlines Company Admin. Complex South Building Cairo Airport Road Cairo - EGYPT Tel: 202 26963188 Mobile: +2 01226466365/01111831239 Email: osamasayed@egyptair.com
Mrs. Reham Mohamed Ibrahim Al Shabrawi	Planning Specialist The Egyptian Holding Company for Airport and Air Navigation (EHCAAN) Cairo Airport Road Cairo Airport-Village Road Cairo-EGYPT Mobile: +2 01120064331 Email: remidar@yahoo.com
Mr. Samir Mohamed Desouki	General Manager Air Transport Economics Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Fax: 202 2678540/1 Tel: 202 2678541 Mobile: +2 01227179298 Email: samir_desoki_m@yahoo.com

NAME	TITLE & ADDRESS
Mrs. Wafaa Fawzy	Flight Data Analysis Egyptair Holding Company Admin. Complex South Building Cairo Airport Road Cairo - EGYPT Fax: 202 226964929 Mobile: +2 01119198880 Email: w_alfi@egyptair.com
Mrs. Zeinab Medhat Mohamed	Air Transport Inspector Ministry of Civil Aviation Complex, Cairo International Airport Cairo Airport Road Cairo - EGYPT Tel: +2 01004989703 Email: zainabmedhat@hotmail.com
OMAN Mrs. Thuraya Saud Al-Busaidi	Statistic Specialist Public Authority for Civil Aviation Muscat International Airport Sultan at of Oman Fax: +968 24510825 Tel: +968 24518903 Mobile: +968 99455237 Email: thuraya@caa.gov.om
SAUDI ARABIA Mr. Abdullah Idress Barnawi	Senior Analyst General Authority of Civil Aviation P.O. Box 887, JED, 21165 Saudi Arabia Tel: +966 613 7721 Mobile: +966 56 292 9922 Email: abarnawi@gaca.gov.sa
Mr. Ibrahim M. Mufti	Analyst Operation Planning ATM GACA-ANS-ATM Air Traffic Management Dept Saudi Arabia Fax: +966 12 6626668 Mobile: +966 5000 20123 Email: imufti@gaca.gov.sa

NAME	TITLE & ADDRESS
Mr. Mansour M. Kodari	Software Engineering GACA/ANS P.O. Box 10238 Jeddah - Saudi Arabia Fax: +966 6717717-1499 Tel: +966 5588 51001 Mobile: +966 5588 51001 Email: mkodari@yahoo.com mkhodary@gaca.gov.sa
Eng. Wael Suliman Al-Angari	Air Transport Dept. Economic Statistics Specialist GACA P.O. Box 887, JED, 21165 Saudi Arabia Tel: +966 613 7755 Mobile: +966 055 165 1516 Email: walangari@gaca.gov.sa
QATAR Mr. Khalid Adbulla Al-Nasiri	Head of Airlines Affairs Civil Aviation Authority P.O.Box 3000 Doha - QATAR Fax: +974 44557249 Tel: +974 44557280/44557282 Mobile: +974 55807060 Email: air.transport@caa.gov.qa
ORGANIZATION ICAO Headquarters Mr. Cyrille Martin	Air Transport Economist, ATB/EAP International Civil Aviation Organization (ICAO) 999 University St., Montreal, Quebec, Canada H3C 5H7 Canada Fax: +1 514 954 6759 Tel: +1 514 954 8150 Email: CMartin@icao.int

NAME	TITLE & ADDRESS
Mr. Jerome Simon	Infrastructure Manager, ATB/EAP International Civil Aviation Organization (ICAO) 999 University St., Montreal, Quebec, Canada H3C 5H7 Canada Fax: +1 514 954 6759 Tel: +1 514 954 8150 Email: JSimon@icao.int