

الطيران المدني
Civil Aviation
دولة الكويت - State of Kuwait



Boubacar Djibo

Director, Air Transport Bureau



Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

الإجتماع الخامس للمدراء العاميين للطيران المدني في منطقة الشرق الأوسط

DGCA-MID/5

Kuwait 4-6 Nov 2019



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



ICAO's Work for Economic Development of Air Transport

Boubacar Djibo

Director, ICAO Air Transport Bureau

5th Meeting of Directors General of Civil Aviation
Middle East Region (MID)

Kuwait City, Kuwait
4 to 6 November 2019



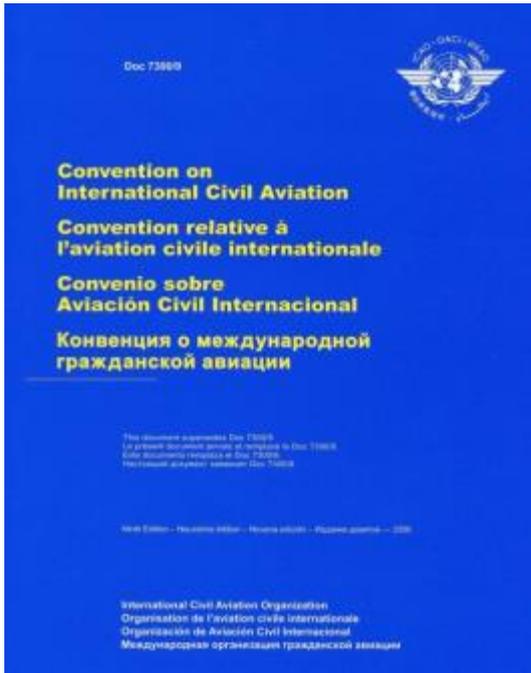
Chicago Convention

Preamble

THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be establish on the basis of equality of opportunity and operated soundly and economically

Article 44

d) Meet the needs of the peoples of the world for safe, regular, efficient and economical air transport





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس إلى آفاق التقدم



40TH Assembly outcome

- A40-9: Consolidated statement of continuing ICAO policies in the air transport field
- Building a better understanding of the benefits and challenges of liberalization and barriers to opening market access;
- Endorsement of ICAO's work programmes on:
 - the Economic Regulatory Framework of Air Transport (including the work to finalize the development of a Multilateral Convention on Foreign Investment in Airlines),
 - Economics of Airports and Air Navigation Services; as well as
 - Aviation Data and Analysis.



Work Programmes to:

- Harmonize global air transport regulatory framework
- Develop international agreements to liberalize ownership & control; core principles on consumer protection; a compendium of competition policies etc. (follow-up to ATConf/6)
- Develop policies and guidance to facilitate access to funding for aviation infrastructure and financing of air transport operations
- Enhance ICAO Air Services Negotiation (ICAN) events in support of a long-term vision for international air transport liberalization
- Provide accurate, reliable and consistent aviation data, statistics and economic analysis
- Develop a single harmonized set of long-term traffic forecasts for global and regional use



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



STATE OF THE INDUSTRY 2018: LATEST FIGURES

Global Numbers



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرواء العالم



State of the Industry

Air Transport Industry has become:

- **A Catalyst for economic development**
- **A vital engine of global socio-economic growth**
- **One of the greatest contributors to the advancement of modern Society**

Countries now place Aviation at the centre of their National Development



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

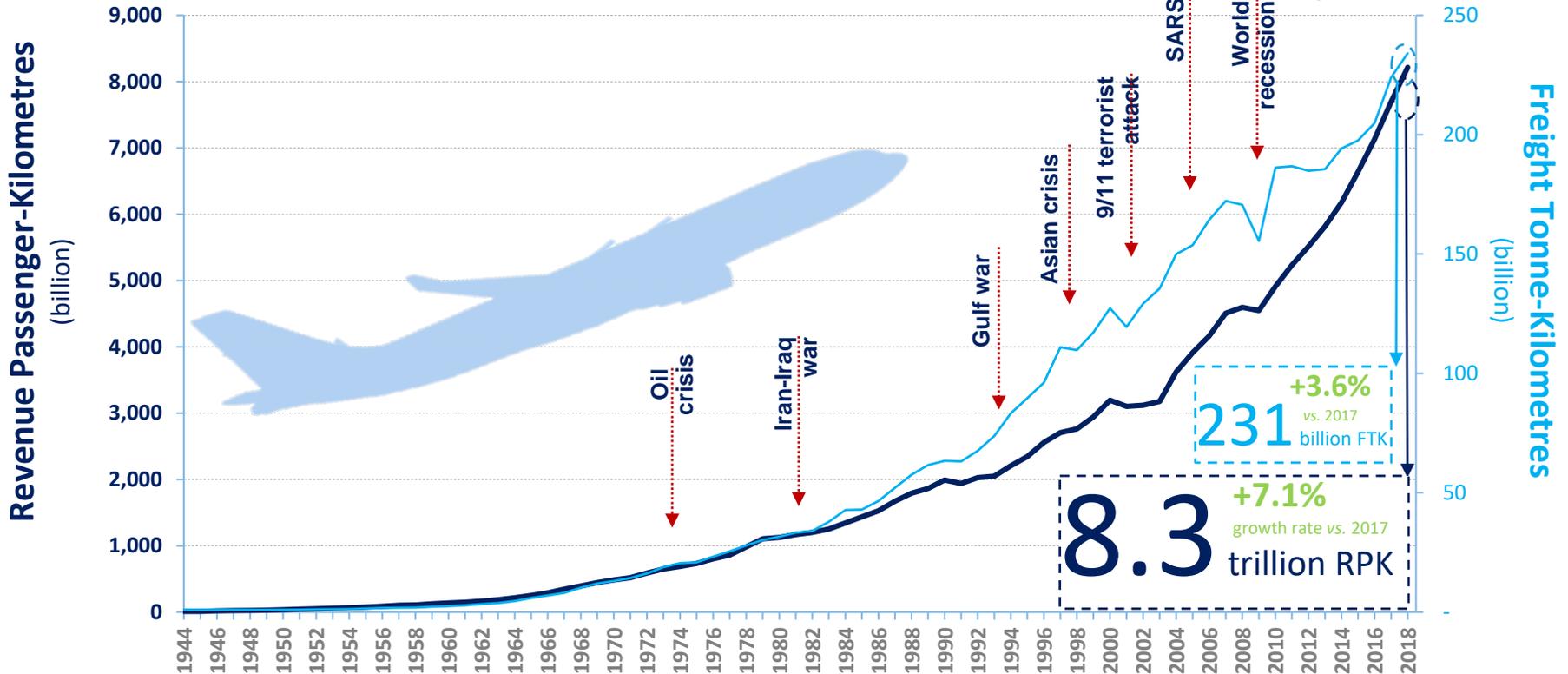
Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
عاماً ٧٥
من التأسيس من أجواء العزم



Growth of air transport in 2018





The size of the industry (2018)

- **4.3 billion passengers**
- **38 million aircraft departures**
- **58 million freight tonnes carried**
- **Over 1 400 scheduled airlines**
- **More than 26 000 aircraft**
- **More than 3 900 airports**
- **173 air navigation centres**
- **360,000 pilots and 86,000 air traffic controllers**



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



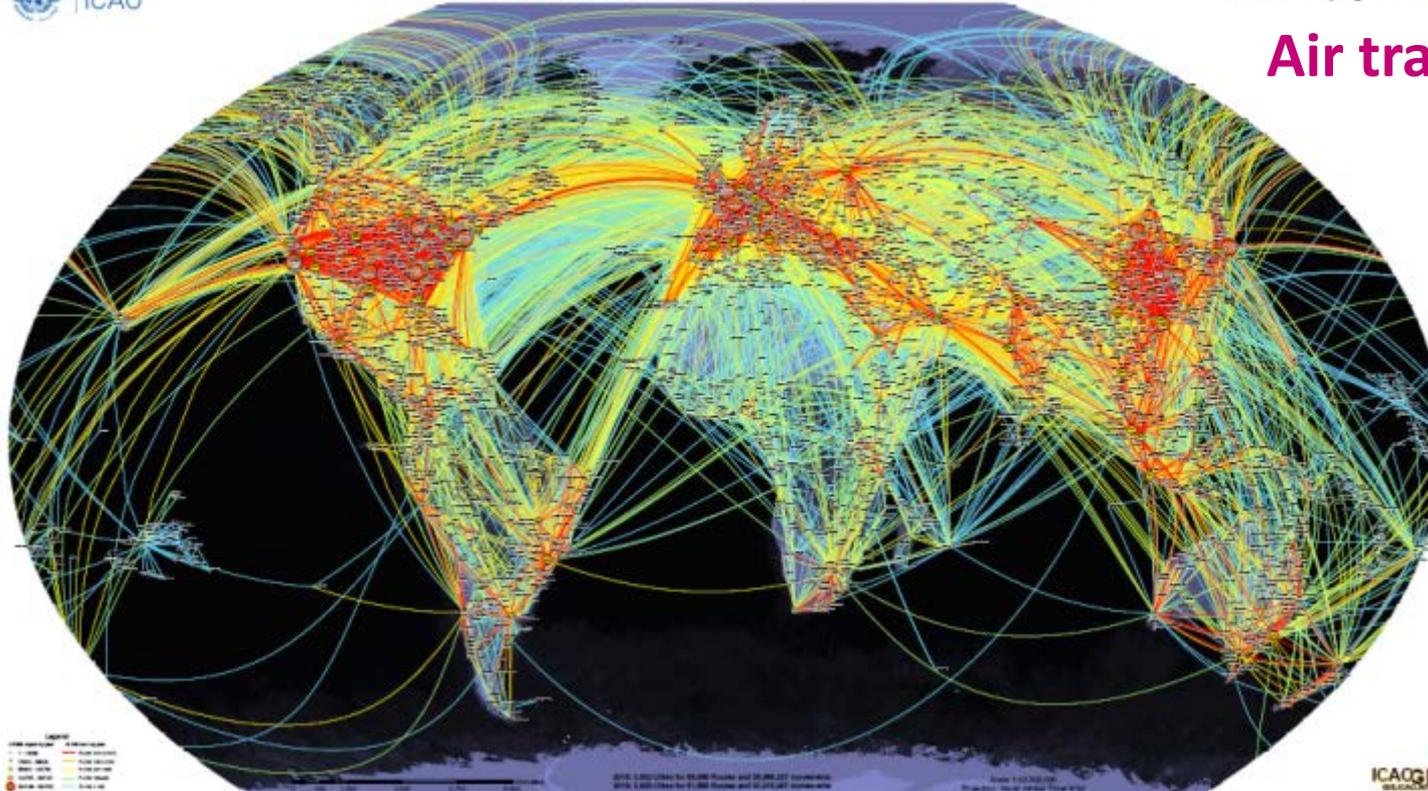
الإيكاو ٢٠١٩
٧٥ عاماً
من الزيادة في أرواح العالم



Air Traffic Flow Chart 2016

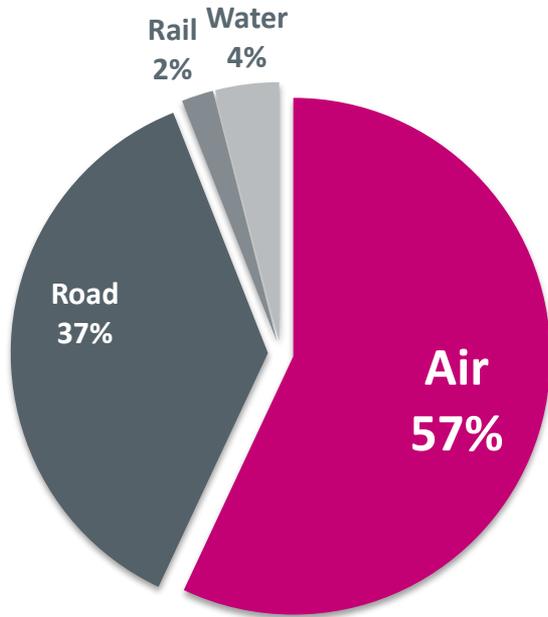
More Info: <http://gis.icao.int>

Air traffic flow 2018

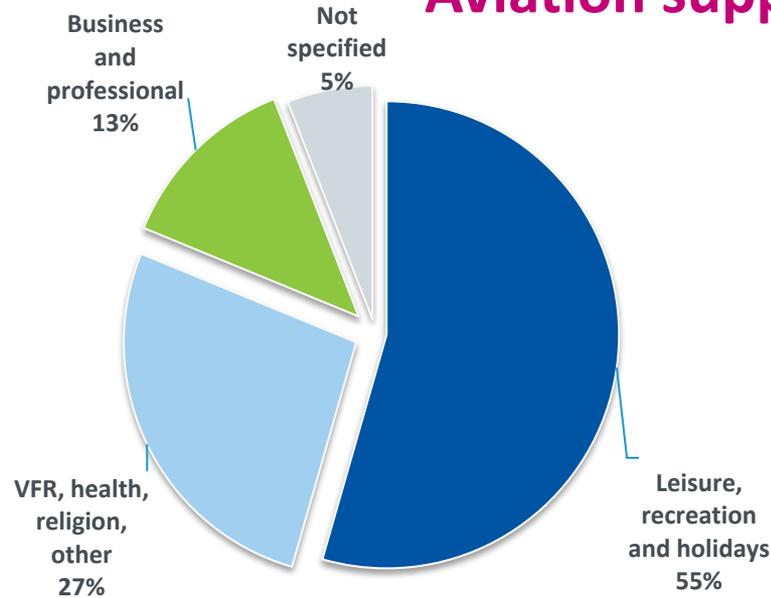




Aviation supports tourism



Inbound tourism by mode of transport, 2017



Inbound tourism by purpose of visit, 2017

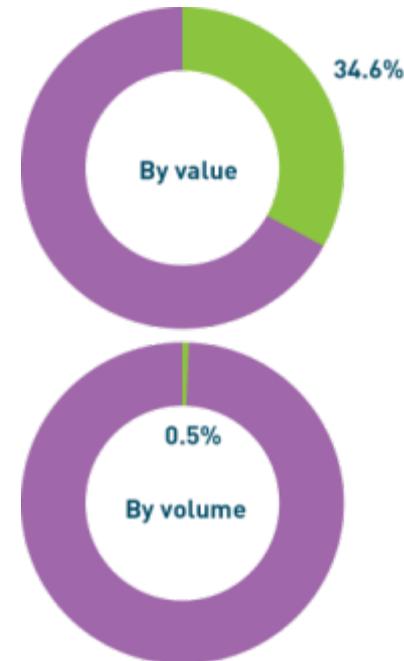
International tourists arriving by air increased from 47% in 2007 to 57% in 2017



Aviation supports trade

- Cargo load factor (in terms of combination of belly and freighter capacity) improved from 50% in 2008 to 55% in 2018.
- 62% of the FTK are carried in the belly of passenger aircraft
- Belly hold of a 777-300ER passenger aircraft carries more cargo than traditional freighters

Air Cargo represents





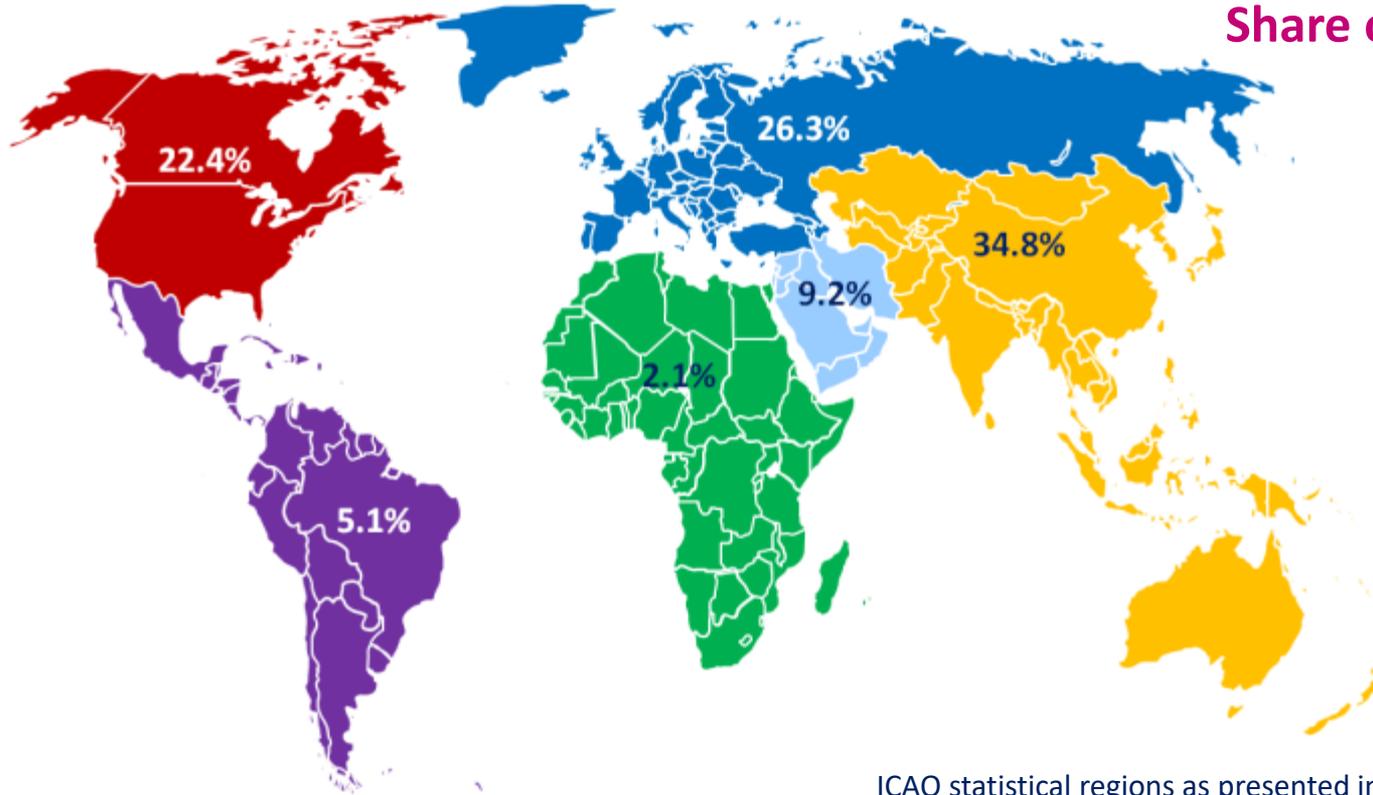
DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



**Share of total scheduled RPK
by region (2018)**

ICAO statistical regions as presented in the Annual Report of the Council



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

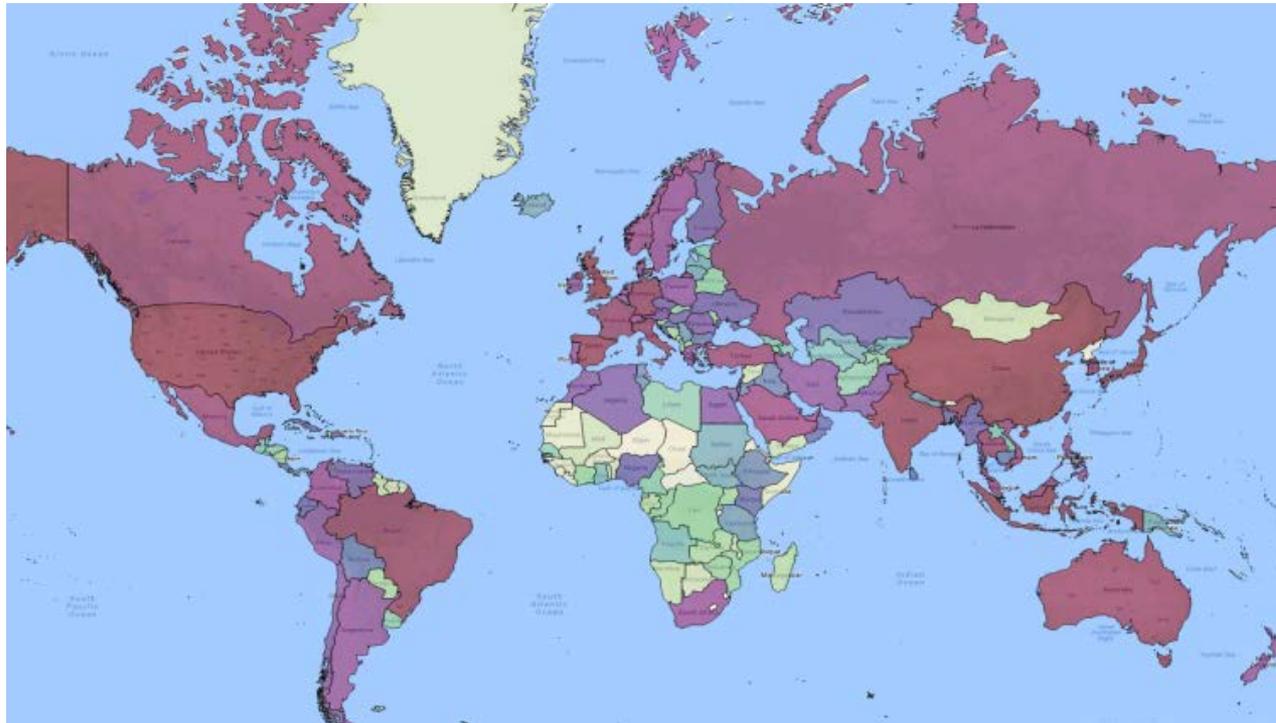
Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التميز



Global Passenger Traffic by Country of Departure in 2017



% of Global Departing
Passengers

Highest

Lowest



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس من أجل سلامة العالم



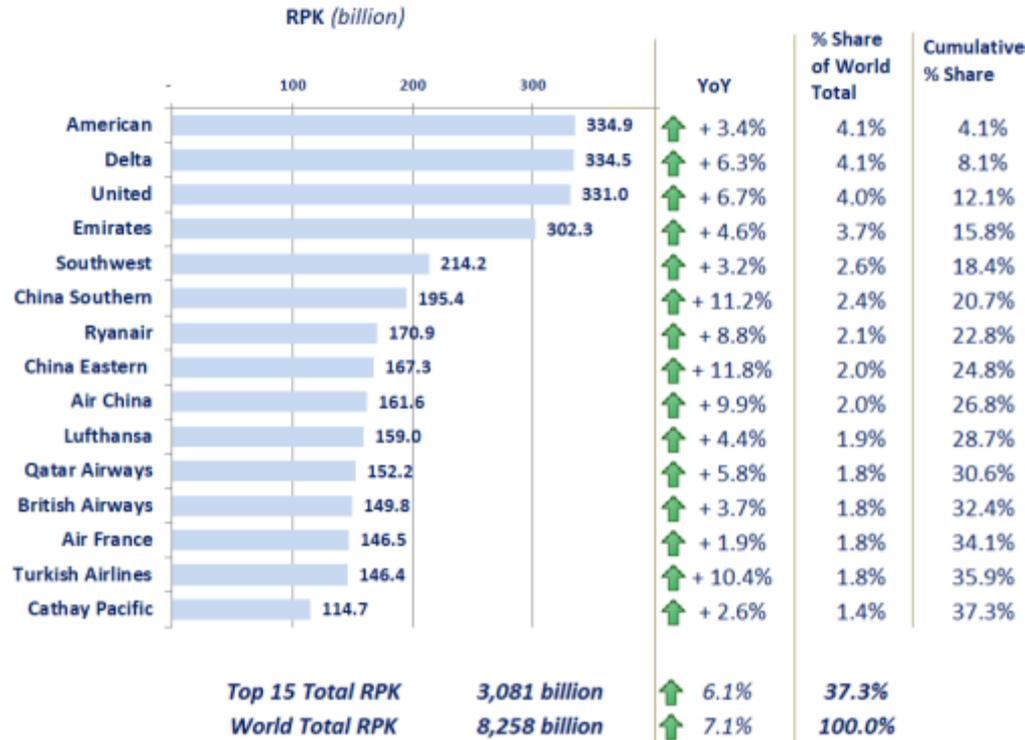
International Total Revenue Tonne-Kilometres (RTK) Traffic ranking in 2018-2017

Rank	State of AOC	RTK 2018 (million)	RTK share (%)	Cumulative (%)
1	China (1)	90,859	12.3521%	12.3521%
2	United States	83,489	11.3501%	23.7022%
3	United Arab Emirates	55,928	7.6034%	31.3056%
4	United Kingdom	42,776	5.8153%	37.1209%
5	Germany	32,299	4.3910%	41.5119%
6	Republic of Korea	28,952	3.9360%	45.4479%
7	Qatar	26,594	3.6154%	49.0634%
8	Turkey	23,812	3.2372%	52.3005%
9	Russian Federation	21,397	2.9088%	55.2094%
10	Ireland	20,380	2.7707%	57.9801%
11	France	19,963	2.7140%	60.6940%
12	Netherlands	18,881	2.5668%	63.2608%
13	Singapore	18,706	2.5431%	65.8039%
14	Japan	18,306	2.4886%	68.2926%
15	Canada	18,064	2.4558%	70.7483%
16	Thailand	13,716	1.8646%	72.6130%
17	Spain	11,984	1.6292%	74.2422%
18	Australia	10,623	1.4441%	75.6863%
19	Malaysia	10,416	1.4161%	77.1024%
20	India	9,949	1.3525%	78.4549%

Rank	State of AOC	RTK 2017 (million)	RTK share (%)	Cumulative (%)
1	China (1)	84,560	12.2030%	12.2030%
2	United States	79,492	11.4716%	23.6746%
3	United Arab Emirates	56,221	8.1133%	31.7880%
4	United Kingdom	39,803	5.7441%	37.5321%
5	Germany	32,954	4.7557%	42.2878%
6	Republic of Korea	27,614	3.9851%	46.2728%
7	Qatar	24,077	3.4746%	49.7474%
8	Turkey	23,592	3.4046%	53.1520%
9	France	19,234	2.7757%	55.9277%
10	Russian Federation	19,230	2.7751%	58.7028%
11	Japan	19,033	2.7466%	61.4495%
12	Ireland	18,675	2.6950%	64.1445%
13	Netherlands	18,247	2.6333%	66.7778%
14	Singapore	17,362	2.5056%	69.2834%
15	Canada	16,848	2.4313%	71.7147%
16	Thailand	11,977	1.7284%	73.4430%
17	Spain	11,491	1.6583%	75.1013%
18	Australia	10,276	1.4830%	76.5843%
19	Malaysia	10,140	1.4634%	78.0476%
20	India	8,941	1.2903%	79.3379%



Top 15 airlines in total Revenue Passenger-Kilometres (RPK) **Top 15 Airlines in 2018**





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٧٠ عاماً
من التأسيس إلى آرزاء التقدم



Top 15 Airports in 2018

Departures (thousand)

	200	400	YoY
Chicago (ORD)		451.9	↑ +4.2%
Atlanta (ATL)		447.8	↑ +1.8%
Los Angeles (LAX)	353.9		↑ +1.1%
Dallas/Fort Worth (DFW)	333.6		↑ +2.0%
Beijing (PEK)	307.0		↑ +2.8%
Denver (DEN)	297.6		↑ +3.5%
Charlotte (CLT)	275.0		↑ +0.4%
Las Vegas (LAS)	269.9		↓ -0.6%
Amsterdam (AMS)	258.9		↑ +0.7%
Frankfurt (FRA)	256.1		↑ +7.7%
Shanghai (PVG)	252.4		↑ +1.6%
Paris (CDG)	244.0		↑ +1.1%
New Delhi (DEL)	240.4		↑ +7.3%
London (LHR)	238.9		↑ +0.4%
Guangzhou (CAN)	238.7		↑ +2.6%

Passenger (millions)

	50	100	YoY
Atlanta (ATL)		107.4	↑ +3.3%
Beijing (PEK)		101.0	↑ +5.4%
Dubai (DXB)	89.1		↑ +1.0%
Los Angeles (LAX)	87.5		↑ +3.5%
Tokyo (HND)	86.9		↑ +4.4%
Chicago (ORD)	83.2		↑ +4.3%
London (LHR)	80.1		↑ +2.7%
Hong Kong (HKG)	74.5		↑ +2.5%
Shanghai (PVG)	74.0		↑ +5.7%
Paris (CDG)	72.2		↑ +4.0%
Amsterdam (AMS)	71.1		↑ +3.7%
New Delhi (DEL)	69.9		↑ +10.2%
Guangzhou (CAN)	69.7		↑ +5.9%
Frankfurt (FRA)	69.5		↑ +7.8%
Dallas/Fort Worth (DFW)	69.1		↑ +3.0%

Freight Tonnes (thousand)

	2,000	4,000	YoY
Hong Kong (HKG)		5,121.0	↑ +1.5%
Memphis (MEM)		4,470.2	↑ +3.1%
Shanghai (PVG)		3,768.6	↓ -1.5%
Incheon (ICN)	2,952.1		↑ +1.0%
Anchorage (ANC)	2,806.7		↑ +3.4%
Dubai (DXB)	2,641.4		↓ -0.5%
Louisville (SDF)	2,623.0		↑ +0.8%
Taipei (TPE)	2,322.8		↑ +2.3%
Tokyo (NRT)	2,261.0		↓ -3.2%
Los Angeles (LAX)	2,209.9		↑ +2.4%
Doha (DOH)	2,198.3		↑ +8.8%
Singapore (SIN)	2,195.0		↑ +1.4%
Frankfurt (FRA)	2,176.4		↓ -0.8%
Paris (CDG)	2,156.3		↓ -1.8%
Miami (MIA)	2,129.7		↑ +2.8%



ICAO International air connectivity index (2017)

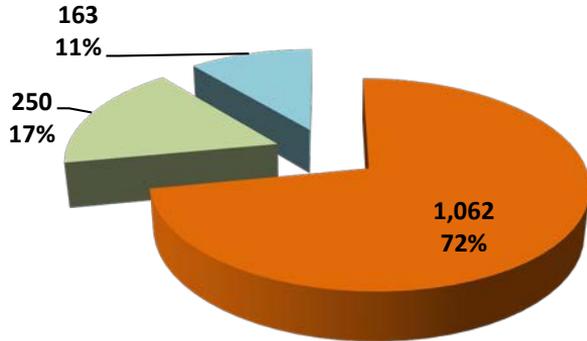
Departure country/region	Destination country/region numbers	World share of international passengers	0 Stop (Direct)	1 Stop	2 Stops	Weighted average number of stops
China (1)	216	7.90%	79.88%	18.94%	1.18%	0.21
United States	222	7.68%	48.32%	45.19%	6.48%	0.58
United Kingdom	223	7.03%	85.07%	13.92%	1.01%	0.16
Spain	212	5.05%	84.75%	13.75%	1.50%	0.17
Germany	218	5.03%	76.32%	21.92%	1.75%	0.25
Italy	214	3.74%	76.25%	21.72%	2.03%	0.26
France	217	3.64%	78.15%	20.36%	1.49%	0.23
Japan	214	2.95%	76.26%	21.51%	2.23%	0.26
Republic of Korea	213	2.35%	86.61%	12.44%	0.95%	0.14
Thailand	213	2.18%	75.38%	22.48%	2.15%	0.27
India	212	2.06%	53.02%	42.42%	4.56%	0.52
United Arab Emirates	212	2.03%	86.94%	12.55%	0.51%	0.14
Canada	213	2.02%	55.67%	38.13%	6.21%	0.51
Switzerland	215	1.62%	78.17%	20.43%	1.39%	0.23
Turkey	208	1.61%	75.47%	23.49%	1.04%	0.26

The World Bank uses this ICAO connectivity index in its major report which focuses on understanding the role of connectivity in economic growth and development (<https://openknowledge.worldbank.org/bitstream/handle/10986/30245/9781464811579.pdf?sequence=6&isAllowed=y>)



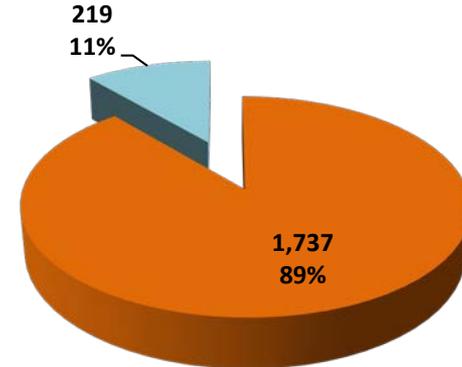
Non-stop and connecting passengers (2017)

Total International Passengers Breakdown
(in million)



- Non-Stop Passengers
- Connecting Passengers with International Stops
- Connecting Passengers with only Domestic Stops

Total Domestic Passengers Breakdown
(in million)



- Non-Stop Passengers
- Connecting Passengers



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019

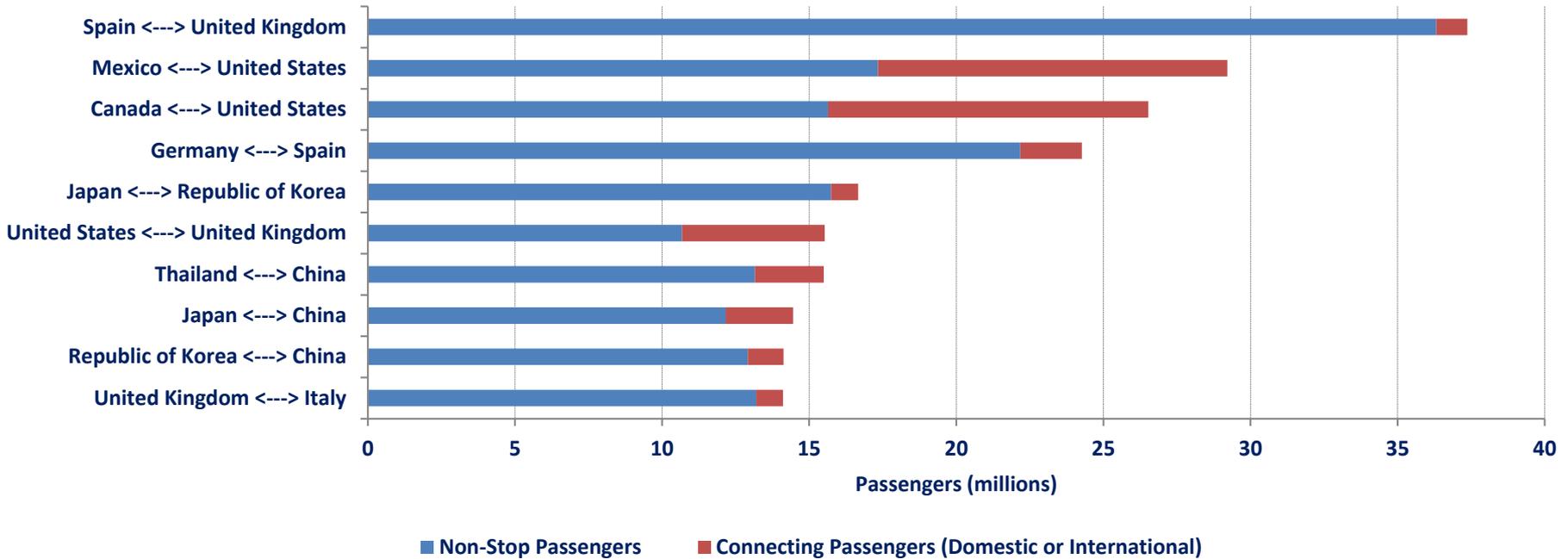


الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس من أجواء التعاون



Top 10 Country Pairs by International Passengers (Two Ways)

Top 10 country-pairs by international passengers (2017)





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019

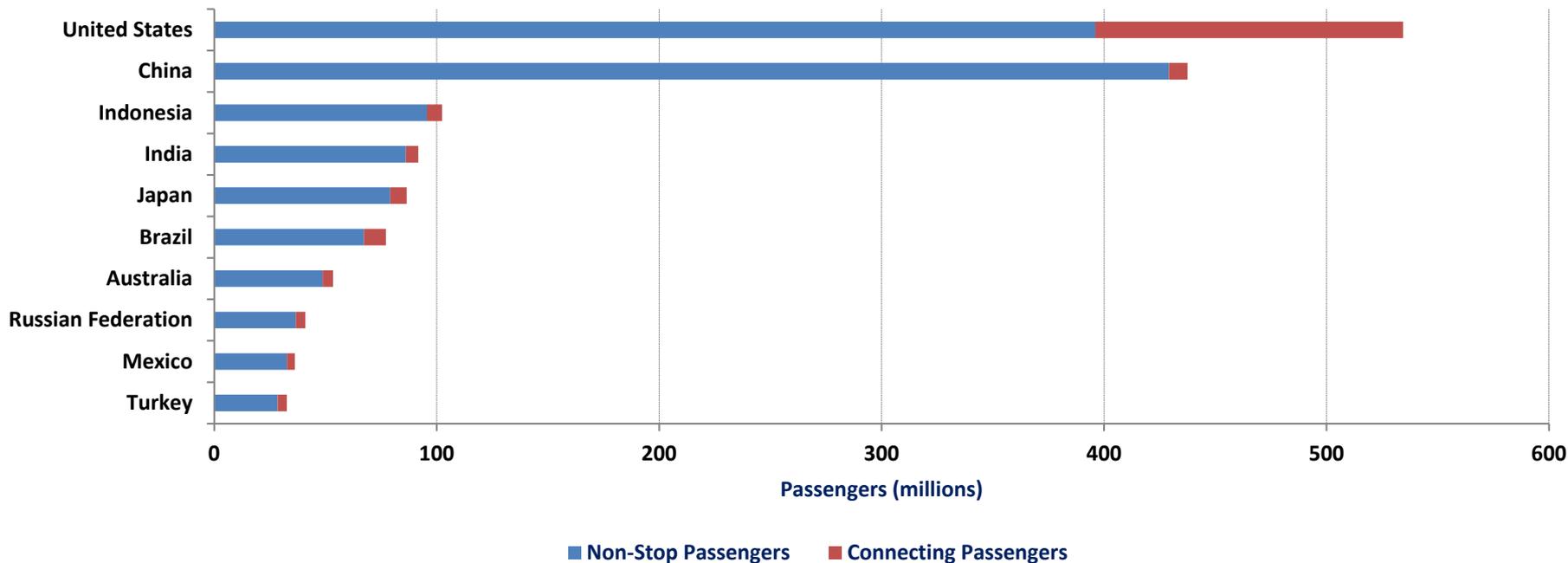


الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التميز



Top 10 Countries by Domestic Passengers (Two Ways)

Top 10 countries by domestic passengers (2017)





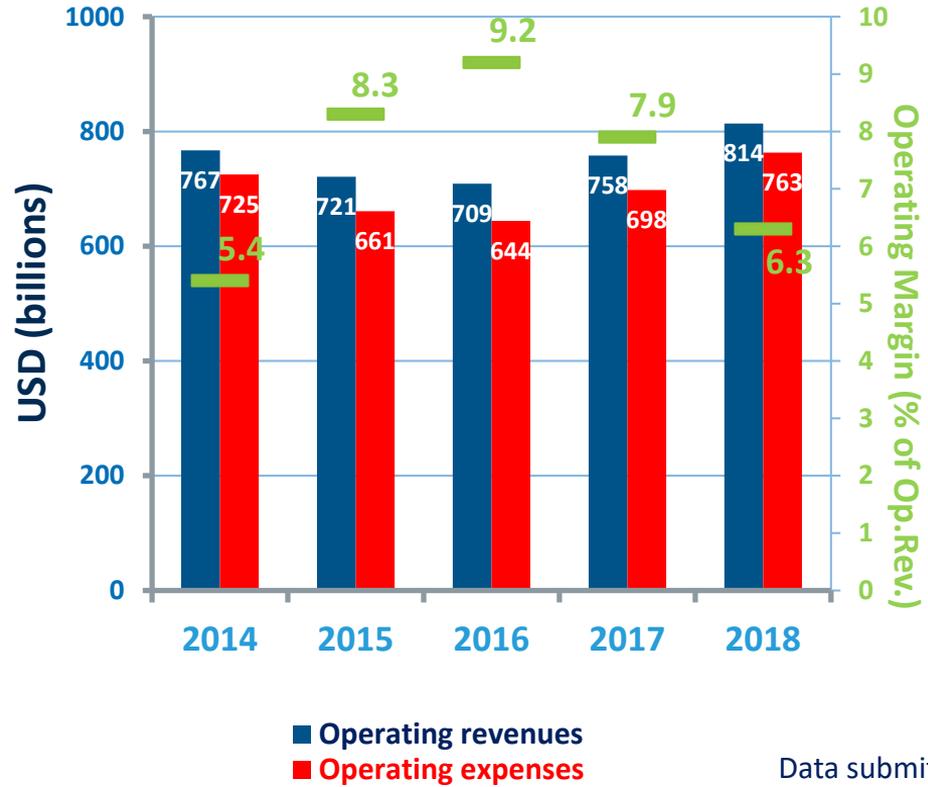
DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

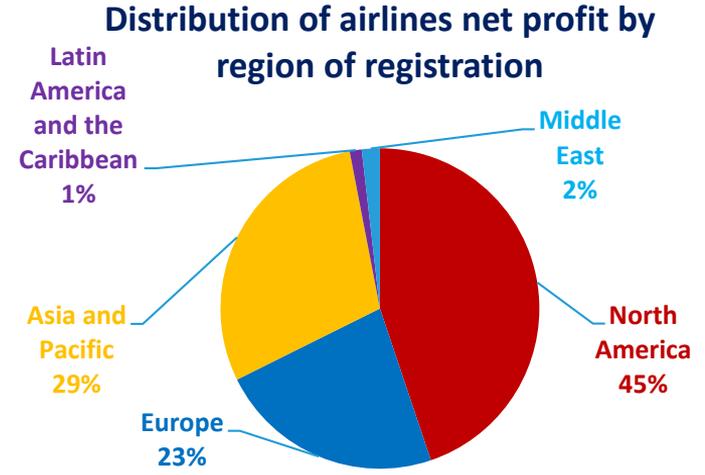
Kuwait 4-6 Nov 2019



الإيكاو ٧٥ عاماً
من التأسيس لرواء العالم



Airlines financial results (2018)

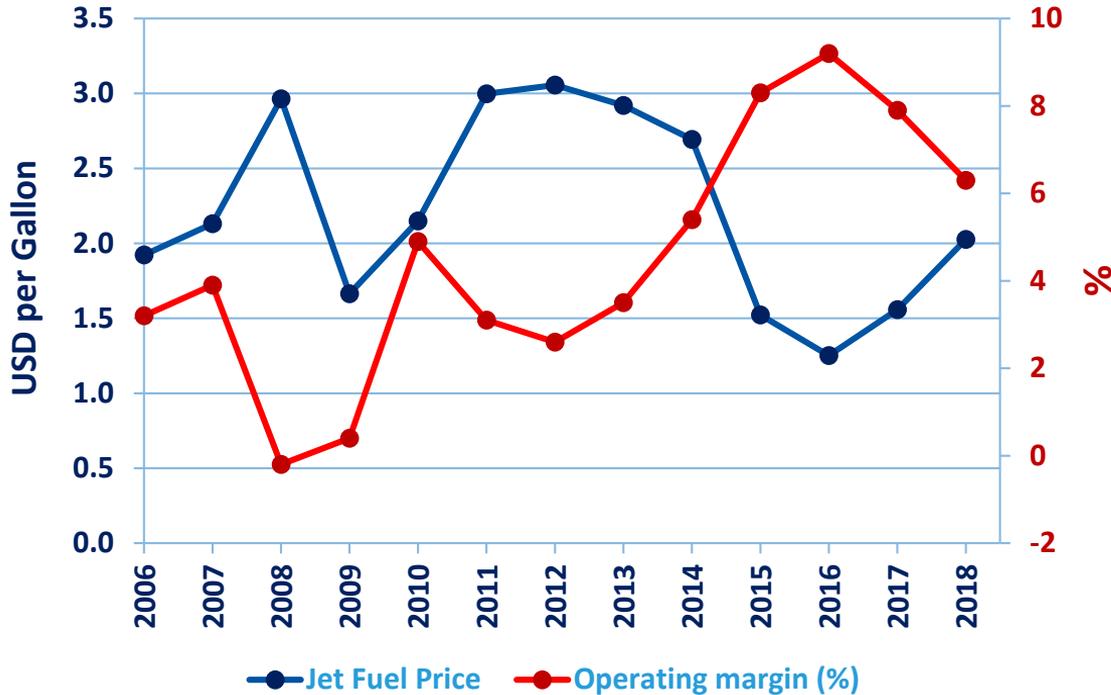


Mixed results at the regional level, with North American airlines concentrating 45% of the profits of the airline industry

Data submitted by States in accordance with Article 67 of the Chicago Convention



Airline operating margin and jet fuel price



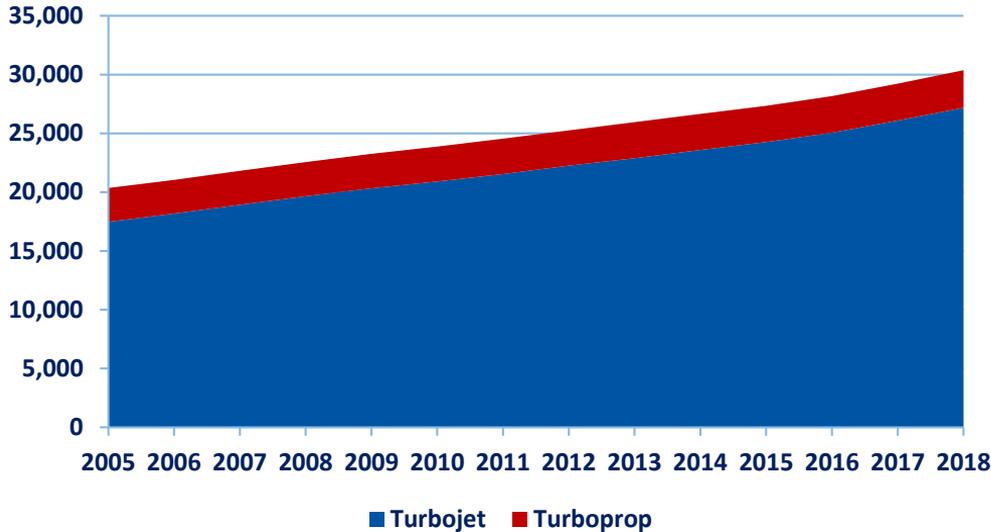
Airlines margin and fuel cost (2018)

- Climbing fuel costs (+30% in 2018)
- Decreasing airline operating margin by 1.6 percent points (7.9% to 6.3%)
- Initial Q1 2019 financial results of airlines show a fall of profits, notably in Europe



Commercial fleet evolution

Airline fleet (2018)



For the 2 largest aircraft manufacturers (Airbus and Boeing) in 2018:

- **1606** new aircraft **delivered**
- **Net orders** for **1640** aircraft

Book to bill ratio* decreased from **1.4 : 1** in 2017 to **1.02 : 1** in 2018, reflecting a decreasing number of orders to deliveries

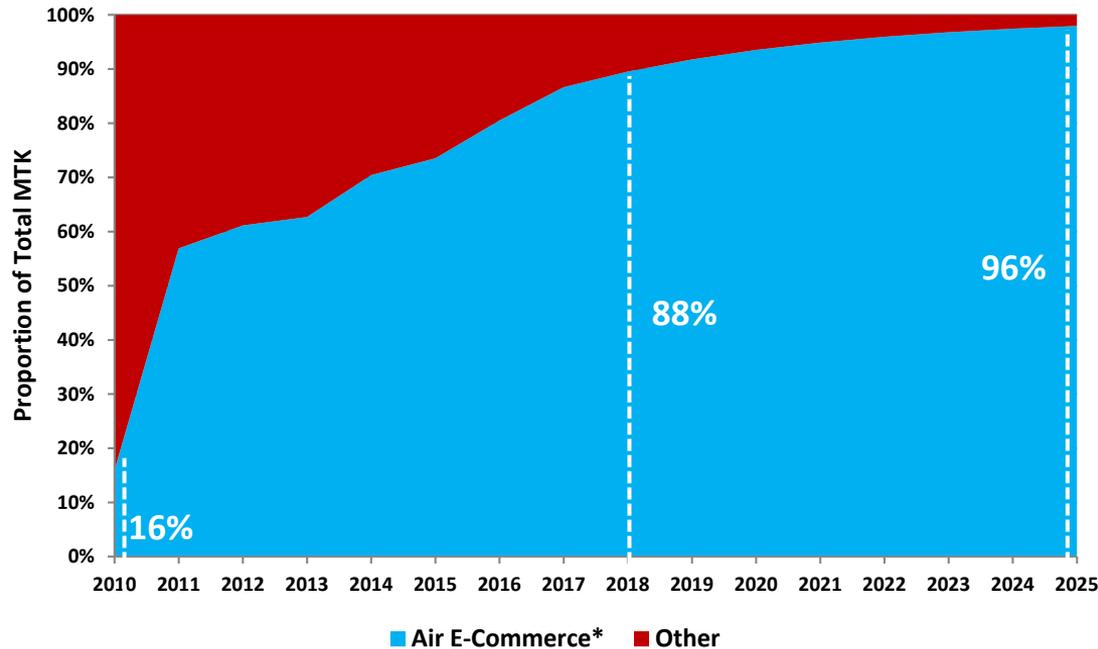
In 2018: 27,200 turbojet aircraft
3,200 turboprop aircraft

* Book to bill ratio: orders / deliveries

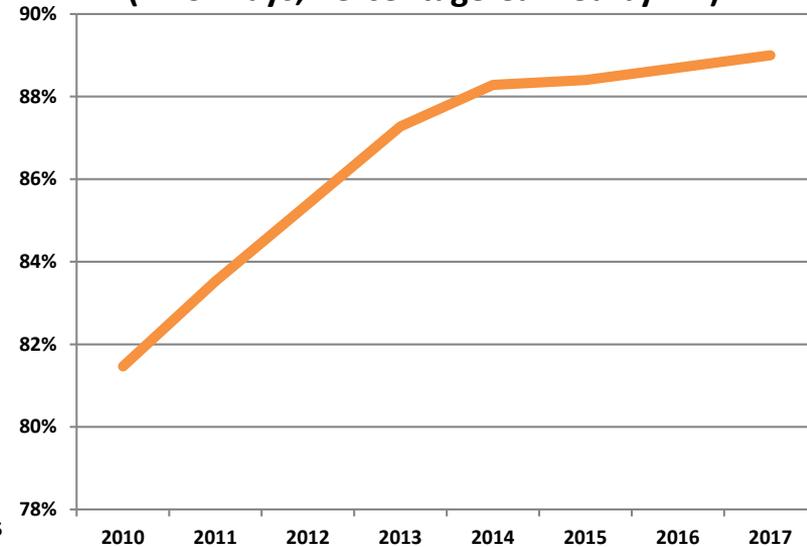


E-commerce development (2018)

International Mail Tonnes Kilometres (MTK) breakdown



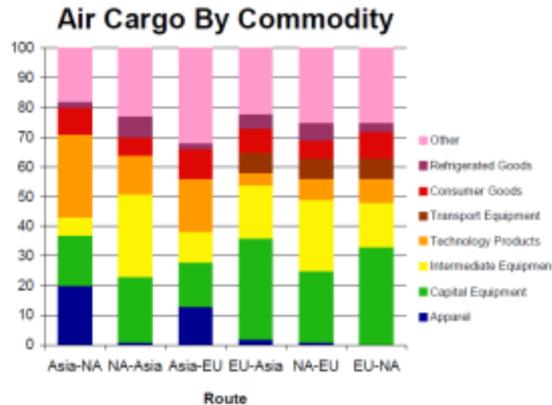
Percentage of E-Commerce Parcels by Air (Two Ways, Percentage Carried by Air)



- E-commerce share of MTKs grew from 16% to 88% between 2010 and 2018 and is estimated to grow to 96% by 2025



E-Commerce stimulates air cargo



Source: World Bank

Aggregated Tonnage of Postal Shipments (in million)

	total	letter-post	parcel-post	EMS
2013	458	163	168	126
2014	567	214	189	164
2015	656	218	220	218
2015/14	15.8%	2.2%	16.6%	32.8%
2014/13	23.8%	31.0%	12.1%	30.3%

Source: UPU Data on Postal Shipments

ICAO is cooperating with UPU and UNCTAD to share big data and research reports on e-commerce

- 2/3 of international postal transportation is by air
- Global B2C e-commerce sales hit \$1.5 trillion in 2015
- Double-digit annual growth in the e-commerce market
- High frequencies of E-commerce transactions may improve the load factors of air cargo carriers



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



STATE OF THE INDUSTRY 2018: LATEST FIGURES

The Middle East Numbers

(States to whom the ICAO Cairo Office is accredited)



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء العالم



MID Office Accreditation Area





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

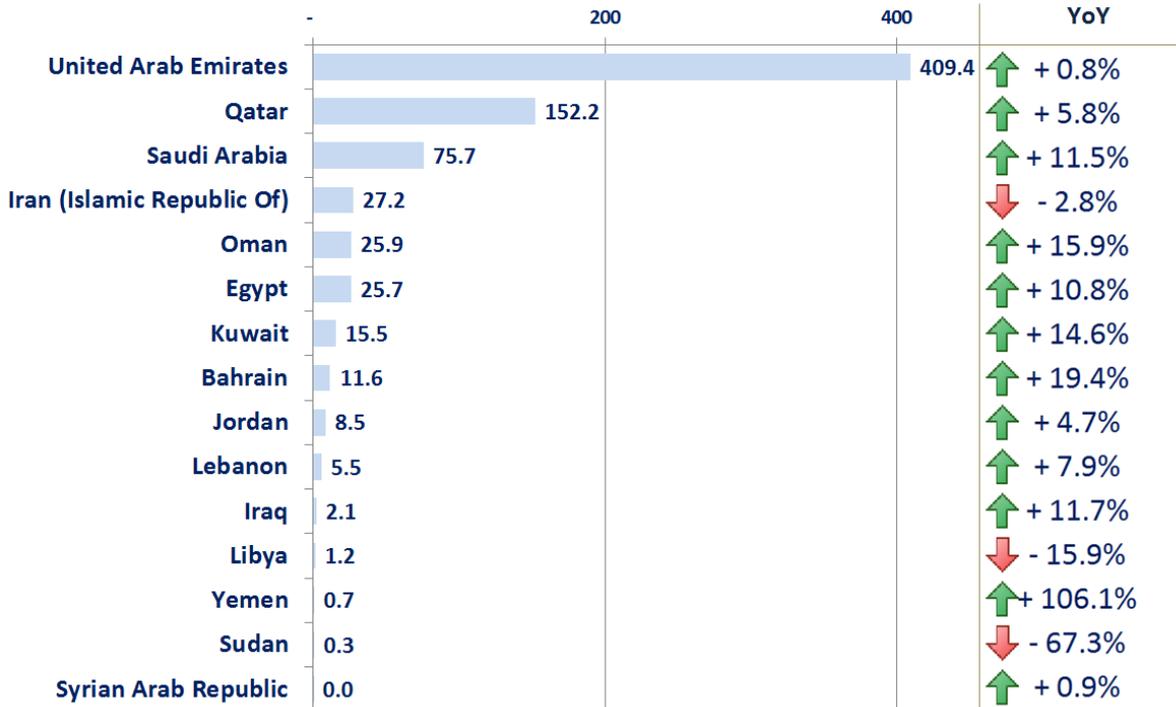
Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس من أرواح المعلم



RPK (billion)



Revenue Passenger
Kilometers (RPK) of 15
Member States in MID



World ranking of Total International Revenue Tonnes-Kilometres (scheduled and Non-Scheduled)

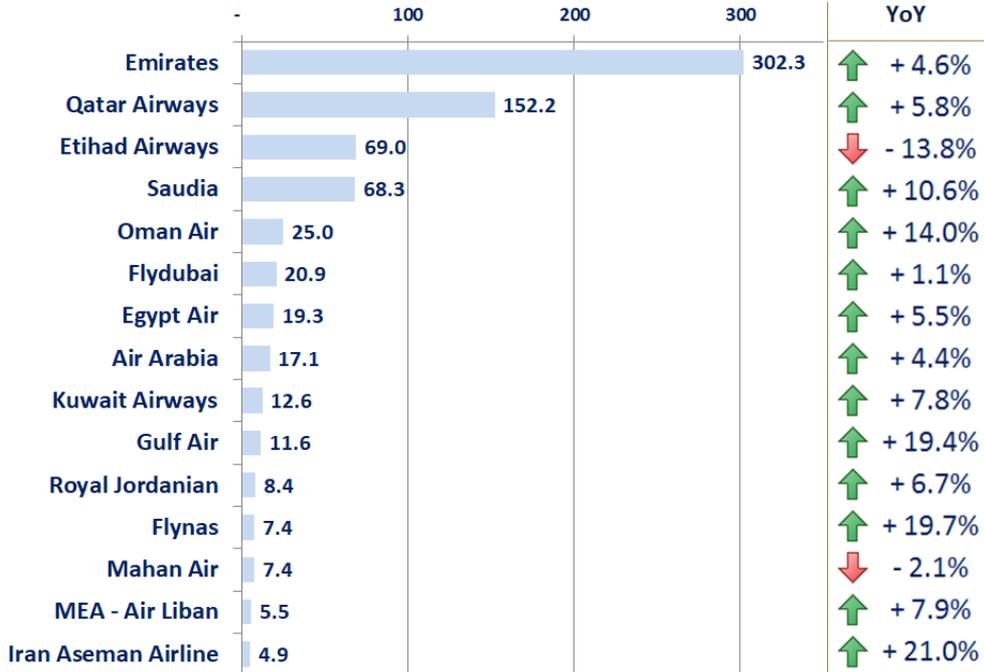
2018 International Total (Scheduled and Non-Scheduled) RTK				
Ranking by State (RTK)	State	International Total RTK (million) (2018)	Share by State (%)	Cumulative Share (%)
3	United Arab Emirates	55,928.4	7.60%	31.31%
7	Qatar	26,594.3	3.62%	49.06%
23	Saudi Arabia	6,887.1	0.94%	81.53%
41	Egypt	3,230.1	0.44%	92.62%
42	Oman	2,778.5	0.38%	93.00%
51	Kuwait	1,799.8	0.24%	95.72%
57	Bahrain	1,361.6	0.19%	96.99%
59	Iran (Islamic Republic of)	1,291.9	0.18%	97.35%
63	Jordan	978.9	0.13%	97.92%
69	Lebanon	623.9	0.08%	98.58%
85	Iraq	203.9	0.03%	99.45%
98	Libya	116.9	0.02%	99.72%
114	Yemen	64.6	0.01%	99.90%
129	Sudan	20.7	0.00%	99.98%
144	Syrian Arab Republic	2.8	0.00%	100.00%

Revenue Tonne -
Kilometers (RTK*) of 15
Member States in MID

* Passengers and cargo combined



RPK (billion)



Top Airlines in MID* in 2018

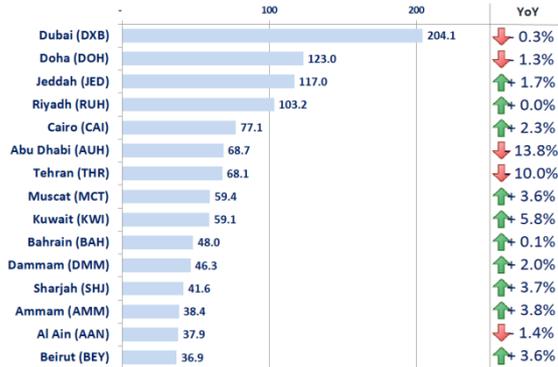
Top 15 airlines accounted for 96.5% of the passenger traffic performed by carriers of MID

* States of MID Office Accreditation Area

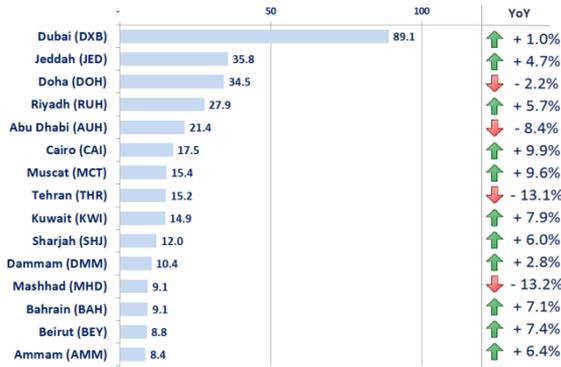


Top Airports in MID in 2018

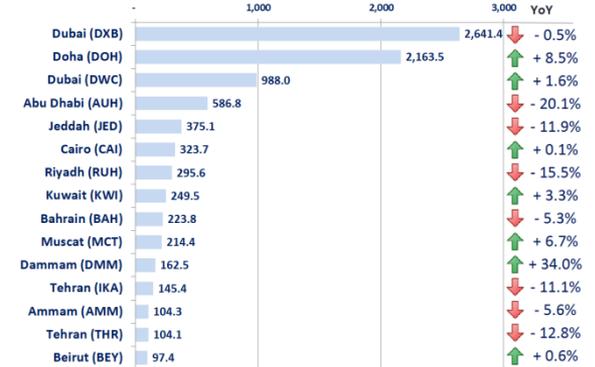
Departures (Thousand)



Passengers (Millions)



Freight Tonnes (Thousand)



* States of MID Office Accreditation Area



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



STATE OF THE INDUSTRY 2018: LATEST FIGURES

The Middle East Numbers (per ICAO Statistical Regions)



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019

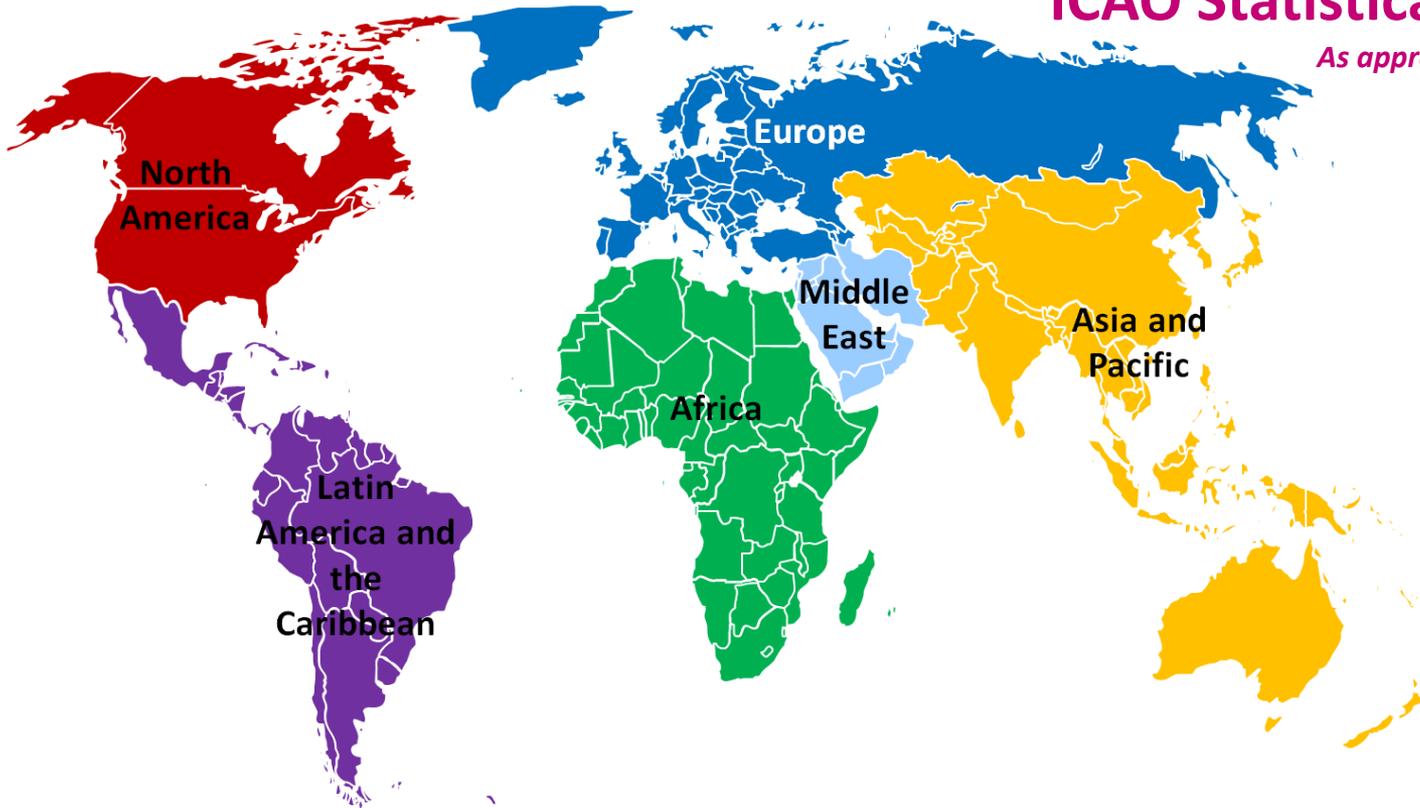


الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لواء العالم



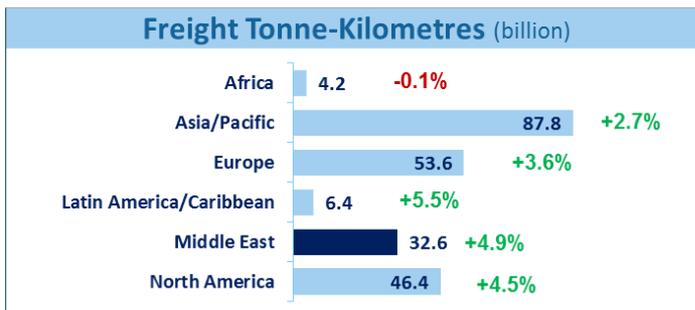
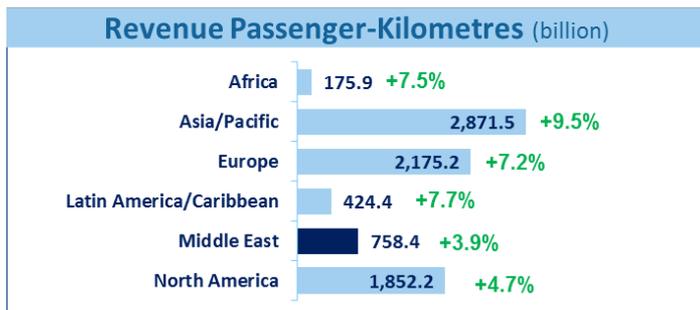
ICAO Statistical Regions

As approved by the Council





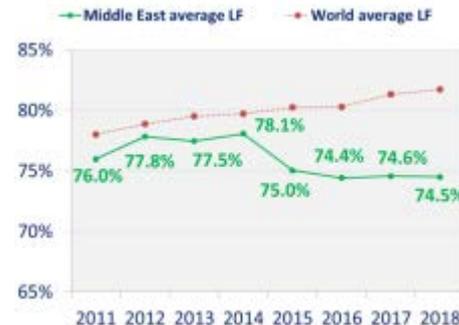
State of Air Transport in Middle East Statistical Region in 2018



ICAO Statistical Region as presented in the Annual Report of the Council



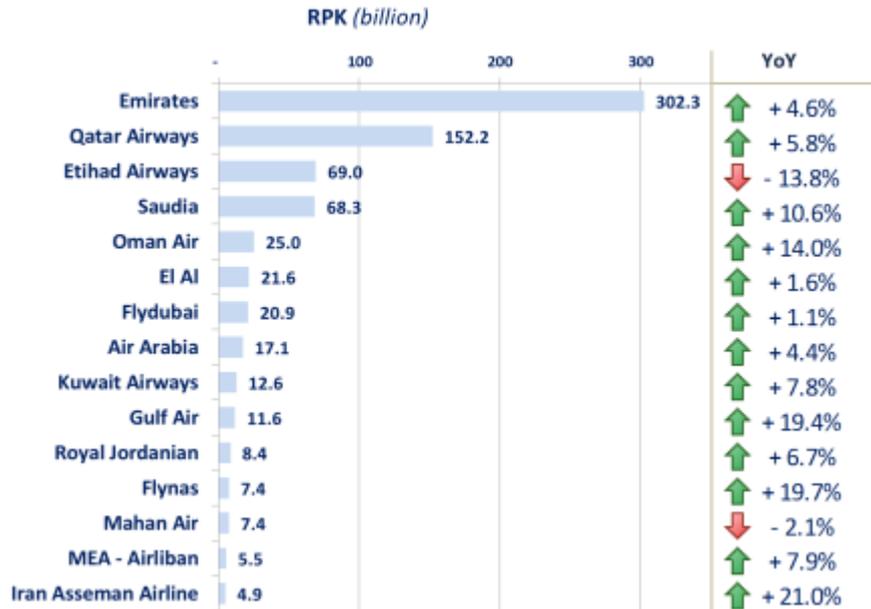
State of Air Transport in Middle East region in 2018



ICAO Statistical Region as presented in the Annual Report of the Council



Top Airlines in Middle East in 2018



Top 15 airlines accounted for 96.8% of the traffic performed by carriers of Middle East



Top Airports in Middle East in 2018



ICAO Statistical Region as presented in the Annual Report of the Council



Low Cost Carriers (LCC) in Middle East in 2018

LCC traffic intra-region



The number of seats within the region offered by LCCs has increased from 2009 to 2018. In 2009, there were about 6.1 million seats offered by LCCs, and this increased to around 25.2 million in 2018.

LCC market share in the Middle East has increased rapidly in the last ten years. The percentage of seats within the region offered by LCCs increased from only 9% in 2009 to 20% in 2018. The total increase, +11 percentage points, is faster than the world total growth of +9 percentage points.

Number of States with LCC traffic in the region



LCC penetration in the Middle East has grown fast in the last ten years. In 2018, 92% of the States had LCC traffic.

All States had LCC traffic between 2009 and 2013. In 2014, 2015 and 2018, only one State did not have LCC traffic. In 2016 and 2017, two States did not have LCC traffic.

The percentage of States in the Middle East having LCC traffic slightly dropped from 100% in 2010 to 92% in 2014 and 2015, then to 85% in 2016 and 2017, and finally it rose up to 92% in 2018.

ICAO Statistical Region as presented in the Annual Report of the Council



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



FUTURE OUTLOOK



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019

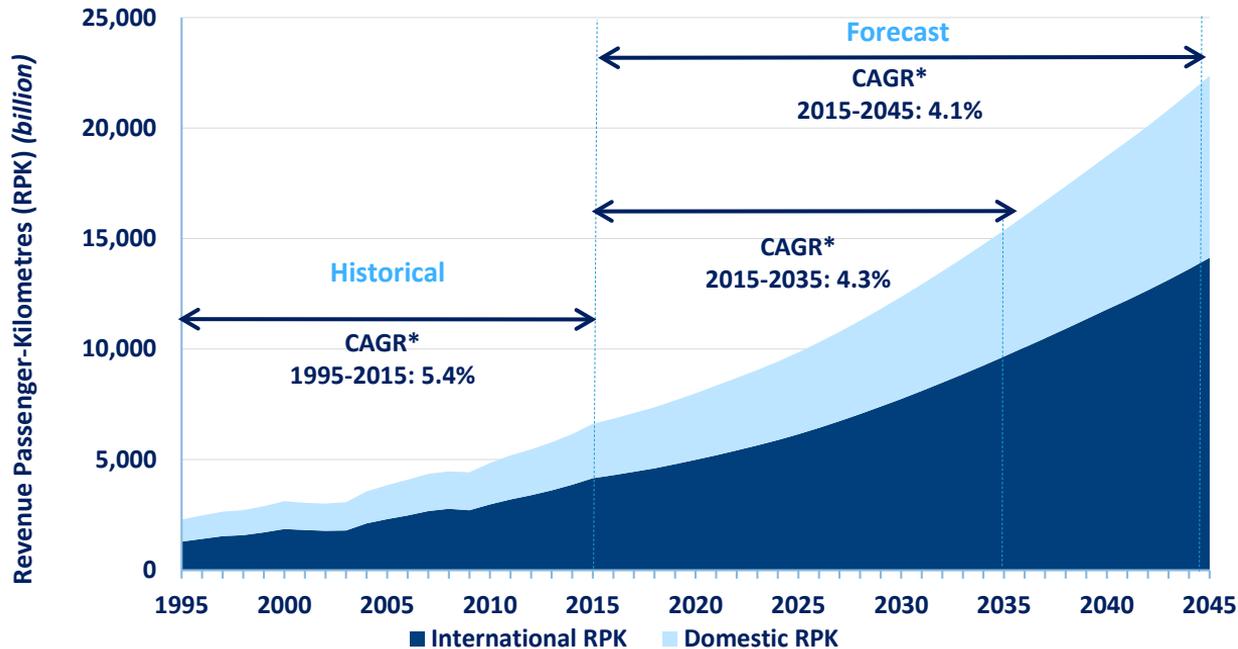


الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرواء العالم



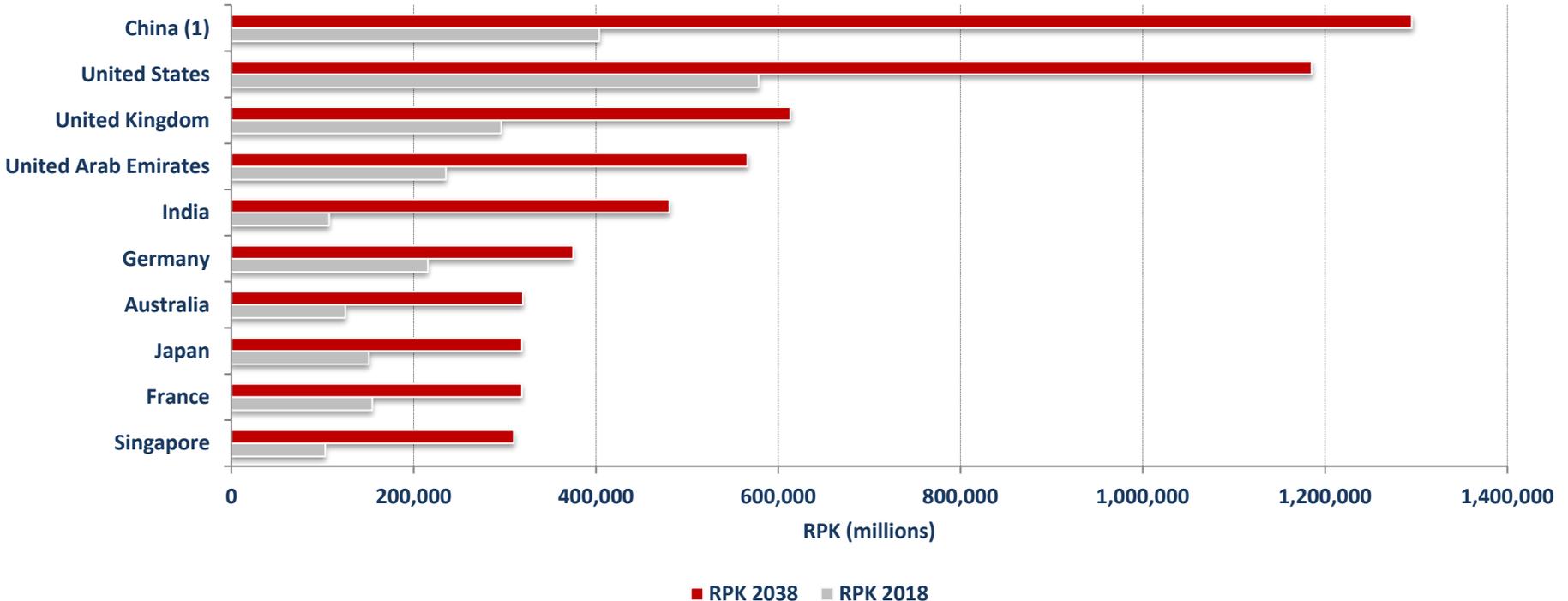
Annual Growth of Scheduled Passenger Traffic

Future outlook





International passenger traffic forecasts by State Top 10 Countries by Forecasted International RPK 2038





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

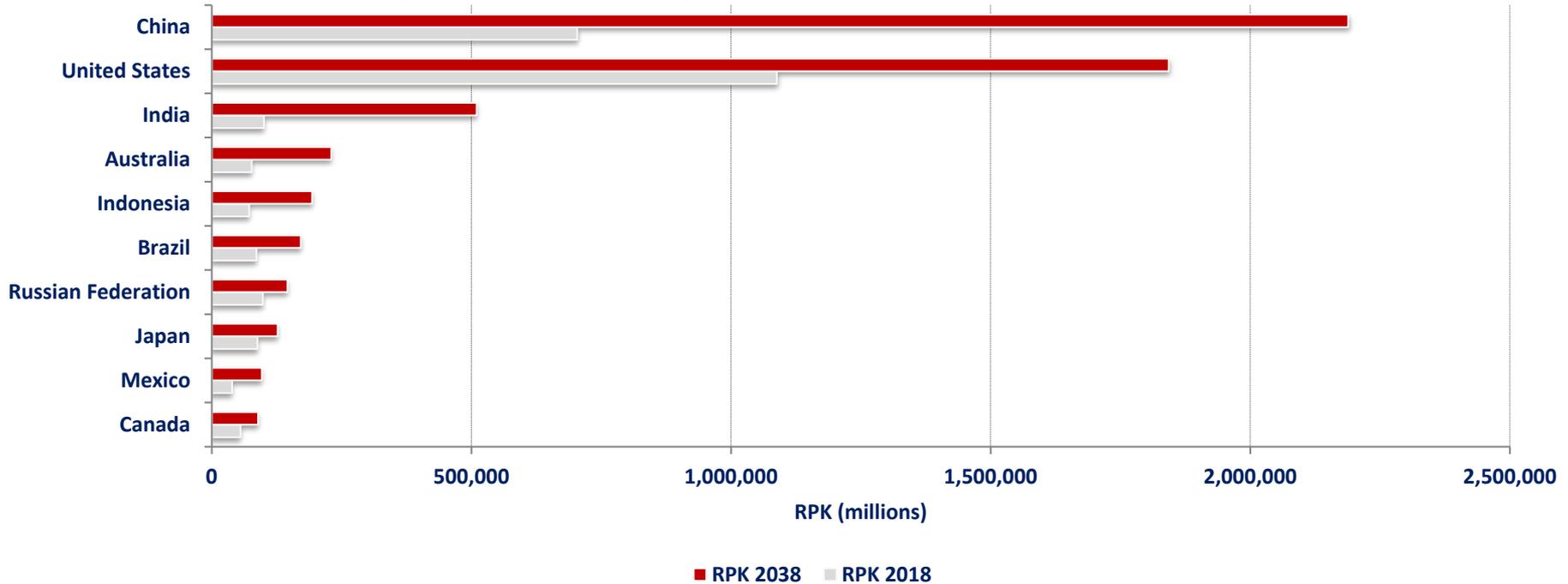
Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التمتع



Domestic passenger traffic forecasts by State Top 10 Countries by Forecasted Domestic RPK 2038





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

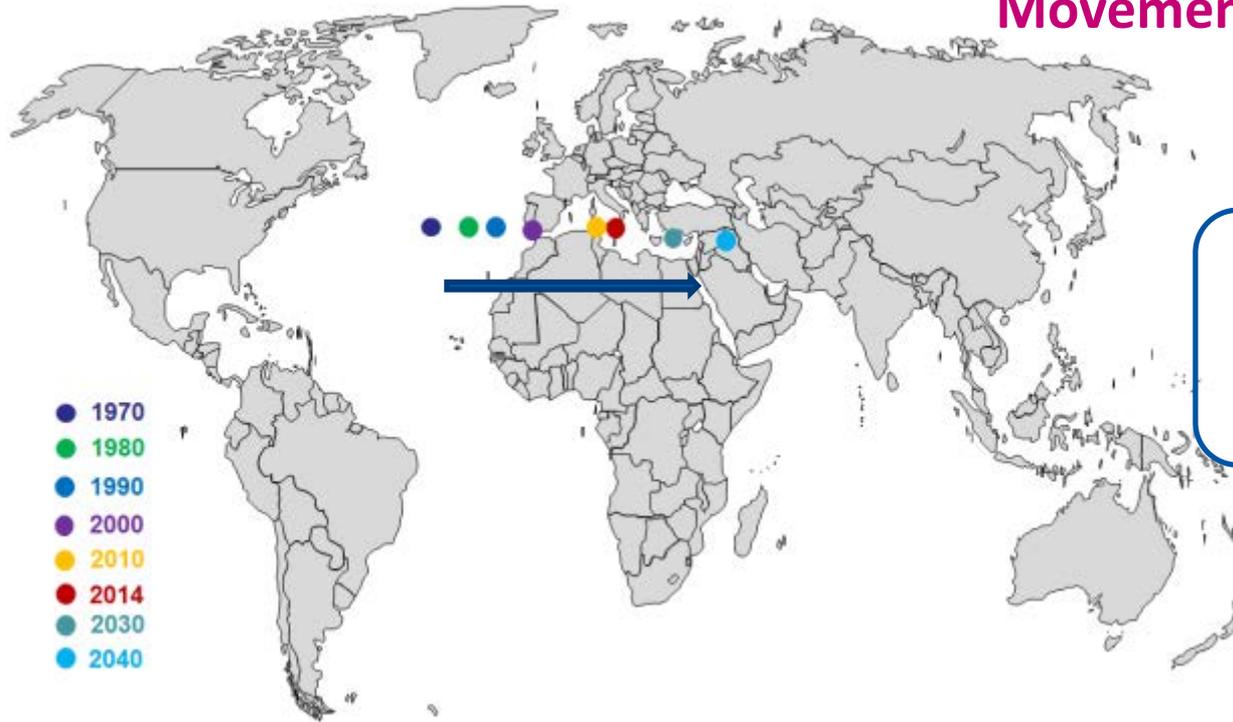
Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التميز



Movement of centre of gravity



The **centre of gravity** has been steadily moving from the **middle of North Atlantic** to the **middle of the Mediterranean sea** in the last four decades. It is expected to move further east by 2040.

Geographical centre of gravity of departing/arriving passengers



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٧٥ عاماً
من التأسيس إلى آرزاء العالم



Traffic forecasting tool



<https://data.icao.int/TrafficForecast/>

Subscribe at cads@icao.int



EASY LONG TERM FORECASTING

50 Passenger Route Groups
(40 International and 10 Domestic)
6 International and 6 Domestic Regions
20 Years of Traffic Forecasts



COMPREHENSIVE HISTORICAL TRAFFIC DATA

Historical Passenger and Cargo Traffic data from 1995 to 2015
Granular data by Air Carrier, City Pair, Country Pair, Route Group and Region



FREIGHT TRAFFIC FLOW

Regional Freight Traffic by type (Belly/Dedicated)



PASSENGER TRAFFIC FLOW

Forecasts of Aircraft Departures, capacities in Available Seat Kilometres (ASK), Revenue Passenger Kilometres (RPK), Passenger numbers and Load factors by Country Pair, Route Group and Regional level



FLEET FORECAST

Fleet forecasts by aircraft type
30 years of fleet forecasts



PERSONNEL FORECAST

Forecast of personnel including Pilots, Air traffic controllers, Technicians, and Cabin Crew Total and new personnel
30 years of forecasts



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



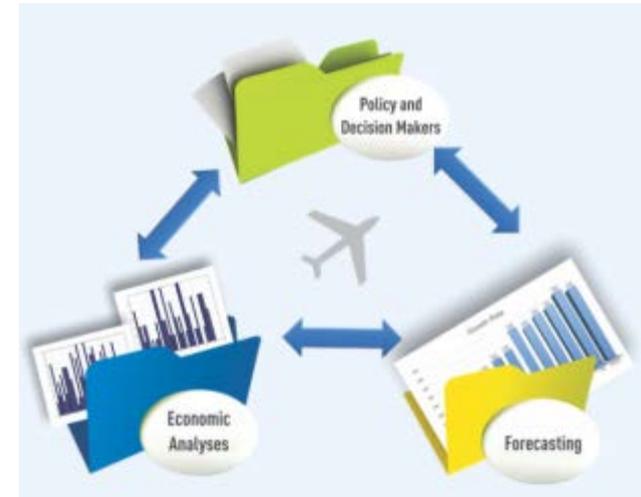
COLLABORATION AND EVENTS



ICAO provides accurate, reliable and consistent aviation data so that Assembly, Council, States, UN Secretariat, international organizations, aviation industry, tourism, trade and other stakeholders can, inter alia:

- make well-informed, data-driven decisions;
- measure and improve air connectivity, safety and security performance and operational efficiency;
- conduct environmental analysis, including future trends of noise, emissions and particulate matter;
- evaluate a gap between forecasted demand and current capacity of infrastructure and human resources;
- develop aviation infrastructure programmes, including the Aviation System Block Upgrades (ASBUs);
- monitor the progress towards the ICAO Global Plan targets and UN SDGs;
- control costs and risks and improve business valuations; and
- estimate civil aviation's contribution on national economy.

Data analysis and forecasts are essential





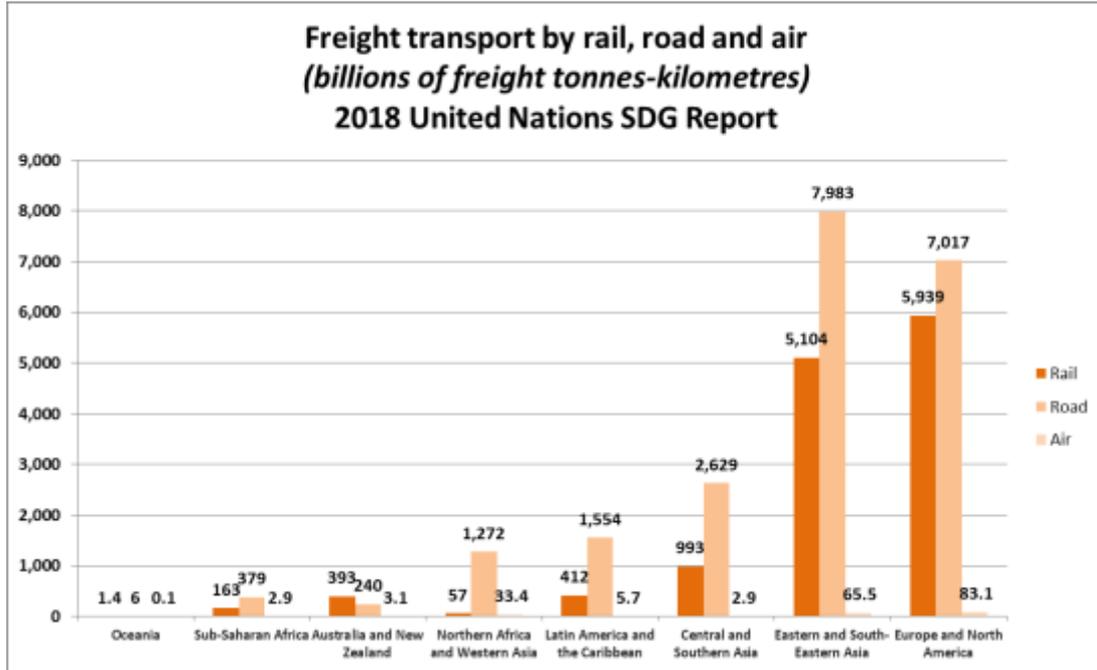
DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس من أرواح المعلم



ICAO is a custodial agency responsible for the global indicator (passenger and freight volumes by mode of transport) of the **SDG target 9.1** – Develop quality, reliable, sustainable and resilient infrastructure with a focus on affordable and equitable access for all.

<https://unstats-undesa.opendata.arcgis.com/search?groupIds=688e20ebffb74d43b40ffbf297e3cf72&page=2>



Collaboration in data analysis

United Nations

- UN SDGs, ComTrade
- Aviation Satellite Account

States

- Licensed personnel forecasts for NGAP
- Collection of statistical data (including joint collection of airport traffic data with ACI)

World Bank

- Global Connectivity Index and Development Indicators
- CRITICAL CONNECTIONS: Why Europe and Central Asia's Regional and Global Connections Matter

International Transport Forum

- True Origin-Destination traffic forecast
- Fleet forecast

Universal Postal Union

- Joint UPU-ICAO research project on international logistic constraints for e-commerce
- Analysis of UPU and ICAO data on international e-commerce transactions

Academia

- Scientific reviews in emerging areas of interest
- Study of air traffic freedoms and route optimization



Aviation Benefits Report

Advanced collaboration through Industry High Level Group (IHLG)



DOWNLOAD YOUR FREE REPORT AT:

<https://www.icao.int/sustainability/Pages/IHLG.aspx>

CONTENTS

- Aviation Overview: From Past to Present
- Economic Benefits of Aviation
- Regional Economic Impact of Aviation
- Social Benefits of Aviation
- Sustainable Air Transport Development
- Modernizing Aviation to Maximize its Benefits
- Leading Aviation for a Better Future
- Checklist on Maximizing Aviation Benefits

HIGHLIGHTS OF THE REPORT

- Global and regional socio-economic contribution of aviation.
- Key facts and figures on the aviation development and performance.
- Contribution of aviation to the United Nations (UN) Sustainable Development Goals (SDGs).
- Overview of the related investment and partnership priorities to be pursued.
- Checklist for maximizing aviation's socio-economic benefits.





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



REGULATORY FRAMEWORK



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



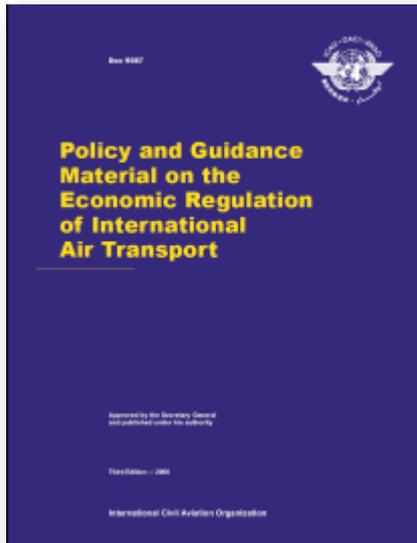
الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لواء العالم



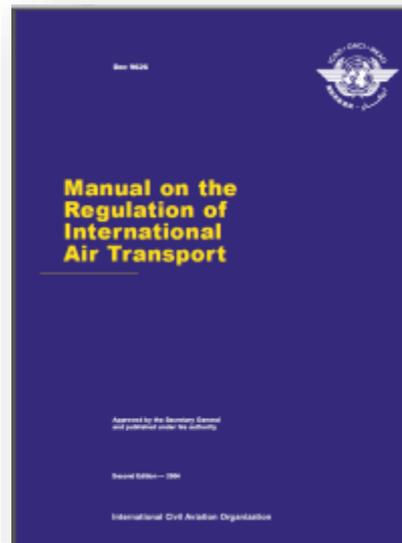
Regulatory Framework

The Role of ICAO in the Sustainable Development of Air Transport

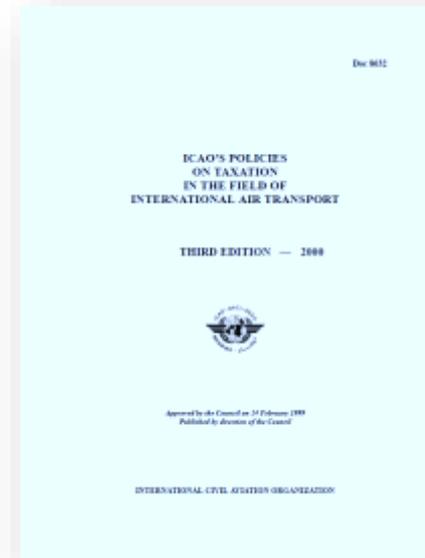
Harmonizing global regulatory framework by developing policies and guidance materials



[Doc 9587](#)



[Doc 9626](#)



[Doc 8632](#)



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٧٥ عاماً
من التأسيس لواء العالم



Regulatory Framework

Harmonizing global regulatory framework by developing policies and guidance materials

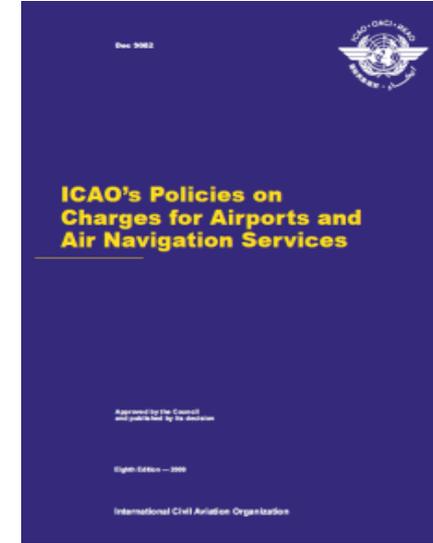
ICAO has developed various policies and guidance on user charges to recover the costs of providing airports and air navigation facilities and services from users.



[Doc 9161](#)



[Doc 9562](#)

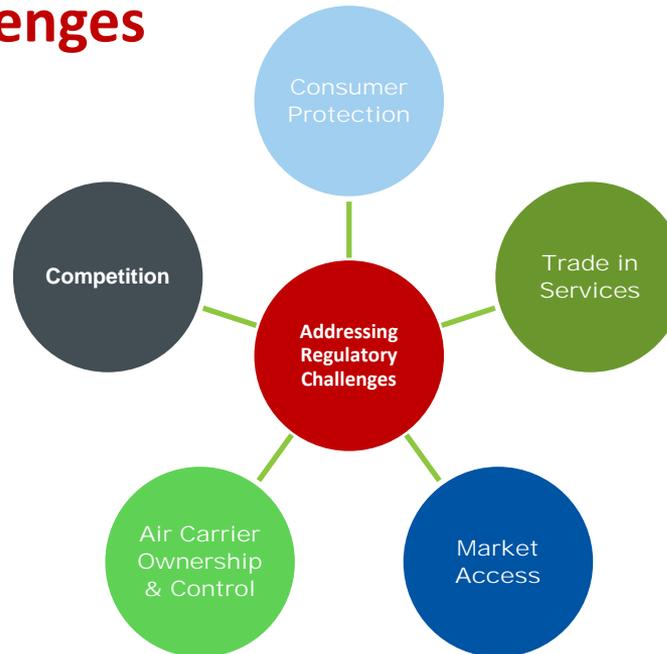


[Doc 9082](#)



Assisting States in Addressing Regulatory Challenges

Regulatory Framework





Voluntary Air Transport Fund

- Mechanism for the collection and use of voluntary contributions from States and other donors to support ICAO's work in the air transport field
- For projects and activities not covered by the Regular Programme Budget under the Strategic Objective, Economic Development of Air Transport
- Consistent, transparent, efficient and timely
- Streamlined administration of donated funds

Why Support ICAO ?

Air transport makes significant contributions across social, economic and environmental pillars of sustainable development. The mode of transport provides freedom to travel, access to mobility and the exchange of cultural experiences. As a result, air travellers represent 52% of international tourists, with over 2.9 billion passengers per year. In addition, 56.6 million jobs are supported by aviation worldwide (34.5 million are aviation-enabled jobs in the tourism sector). The industry gives rise to 3.5% of global GDP (2.2 trillion USD global economic impact). Moreover, air cargo represents 35% of world trade by value carried.

For more information and project proposal, please visit:

<http://www.icao.int/sustainability/Pages/TRAF.aspx>



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس من أجواء التعاون



Upcoming event

ICAN 2019

**Aqaba,
The Hashemite Kingdom of Jordan**

2 – 6 December 2019

ICAN website

<http://www.icao.int/Meetings/ICAN2019>





DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لواء العلم



Upcoming event

Aviation Data and Analysis Seminar

Bangkok, Thailand, 10-13 December 2019

- Objective of the Seminar is to bring together all stakeholders, (Regulators, Air Navigation Services Providers (ANSPs), Aerodrome Operators, Aircraft Operators, International Organizations and Industry) to review the current situation and trends of aviation, including the synergies between aviation, tourism and trade
- Presentations on the latest applications in data and analytics that are used for efficient decision making by different aviation stakeholders, as well as a number of discussion panels addressing interesting subjects such as: information systems to improve airline efficiency, economics of airports and ANSPs.

Programme and registration information are available online:

https://www.icao.int/Meetings/Bangkok_adap2019/Pages/default.aspx



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



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, including the long-term vision for liberalization and core principles on consumer protection
- coordinate with ICAO in meeting States' needs of data, analysis and tools to promote air transport development in the region
- encourage contributions to the Voluntary Air Transport Fund



DGCA-MID/5

Fifth Meeting of the Directors General of Civil Aviation- Middle East Region

Kuwait 4-6 Nov 2019



الإيكاو ٢٠١٩
٧٥ عاماً
من التأسيس لرجاء التعميم



Thank You, Merci, Gracias
Спасибо, Spasiba
شكرا, Shukran
谢谢, Sie Sie

ICAO2019



75 YEARS
OF CONNECTING THE WORLD

CELEBRATE



YEARS OF CONNECTING THE WORLD



Thank You