



الهيئة العامة للطيران المدني  
GENERAL CIVIL AVIATION AUTHORITY



## ICAO MID DGCA/ 6 Meeting

1<sup>st</sup> -3<sup>rd</sup> Nov 2022 Abu Dhabi - UAE

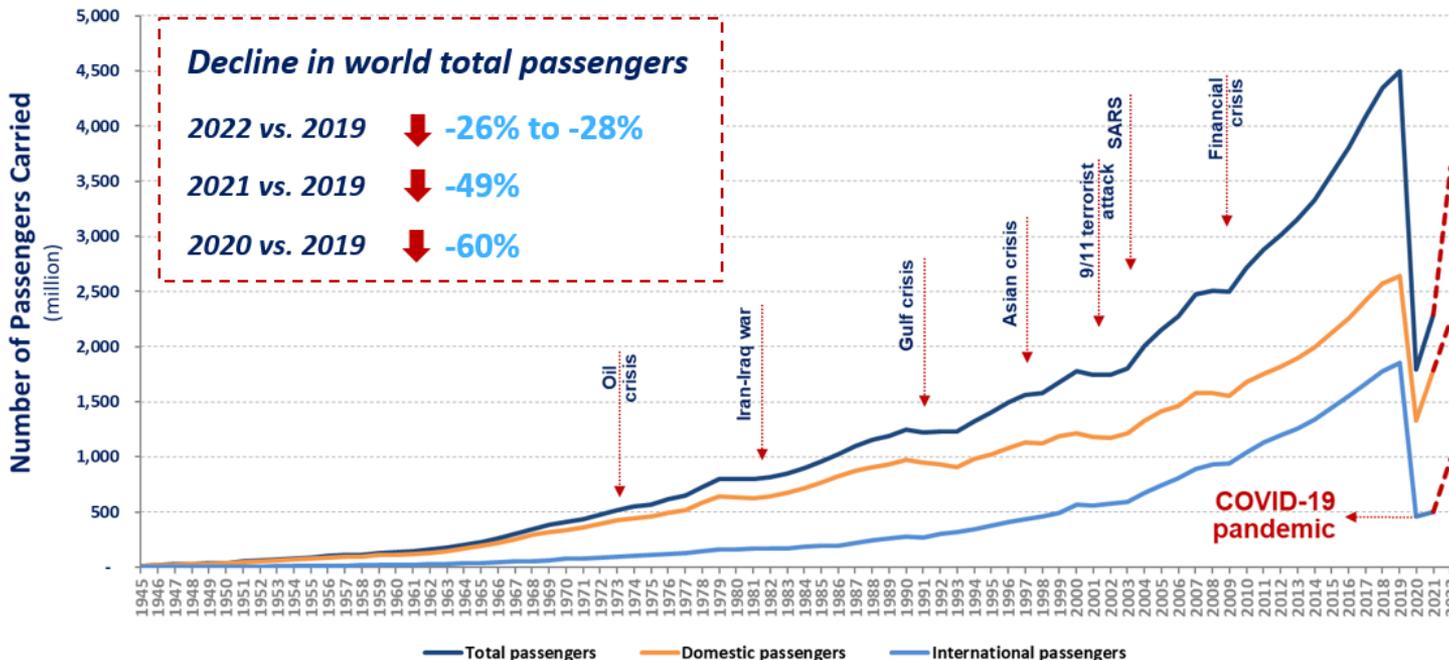


# Economic Development of Air Transport



# State of the Industry

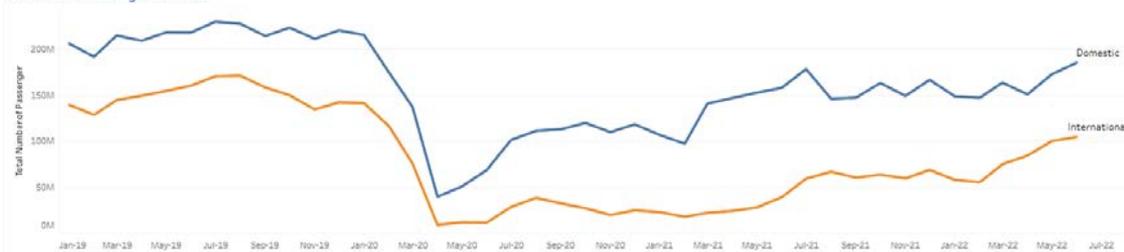
## World passenger traffic evolution 1945 – 2022\*



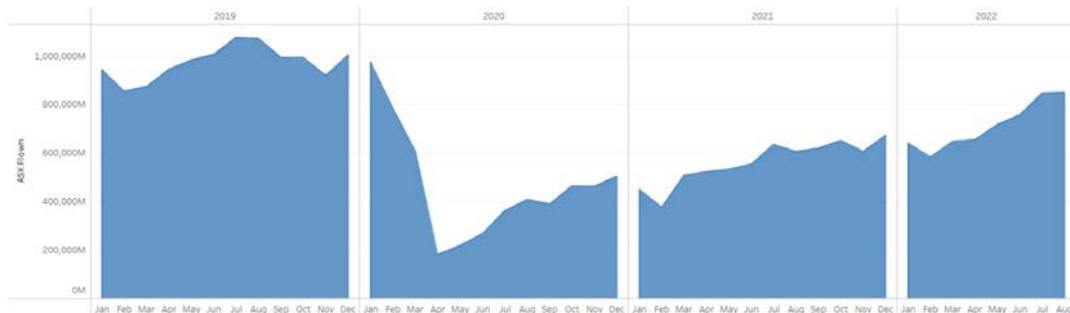
## Air traffic recovery fast approaching pre-pandemic levels

ICAO's latest analyses reveal that air transport seat capacity and passenger totals globally have reached an estimated 80% of pre-pandemic levels

Overview of Passenger Evolution

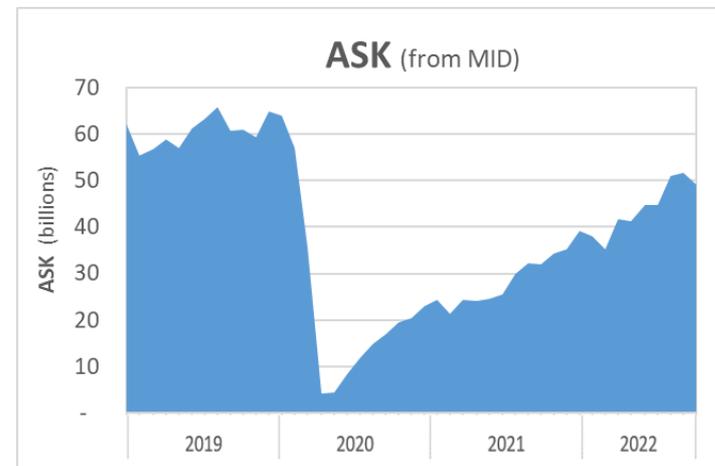
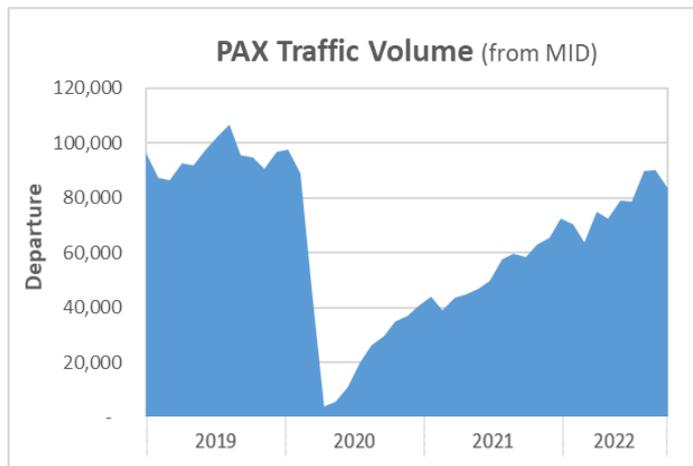


+55% air passengers from Jan-August 2022 compared to the same period in 2021.



+32% seat capacity from Jan-August 2022 compared to the same period in 2021.

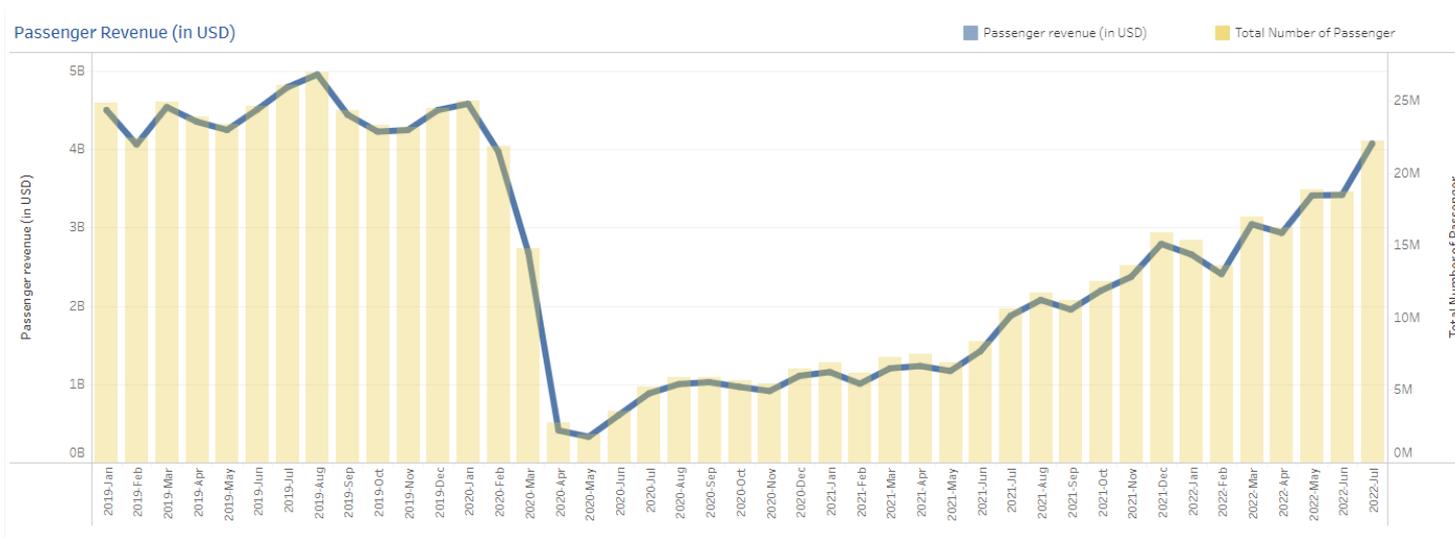
## MID Passenger Traffic



- MID Passenger traffic in departure volume and ASK shows constant recovery since the pandemic shock in 2020.
- Departure volume from MID recovered by 87.5% compared with 2019.
- ASK from MID recovered by 80.9% compared with 2019.

## Airline revenue in the Middle East approaching pre-pandemic levels

ICAO's latest analyses reveal that airline passenger revenue in the Middle East has reached an estimated 85% of pre-pandemic levels in monthly level – July 2022 vs. July 2019



- A majority of international route groups should fully recover to their pre-pandemic levels by either the fourth quarter of this year or Q1 2023.

# **Air Transport Policy and Regulation**

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

A41 - "Urges 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"



## Sixteenth Meeting of the Air Transport Regulation Panel (ATRP/16)



### Airline ownership and control

- Revised draft Convention on Foreign Investment in Airlines was discussed
- Continue to work on finalizing the draft Convention



### Liberalization of air cargo

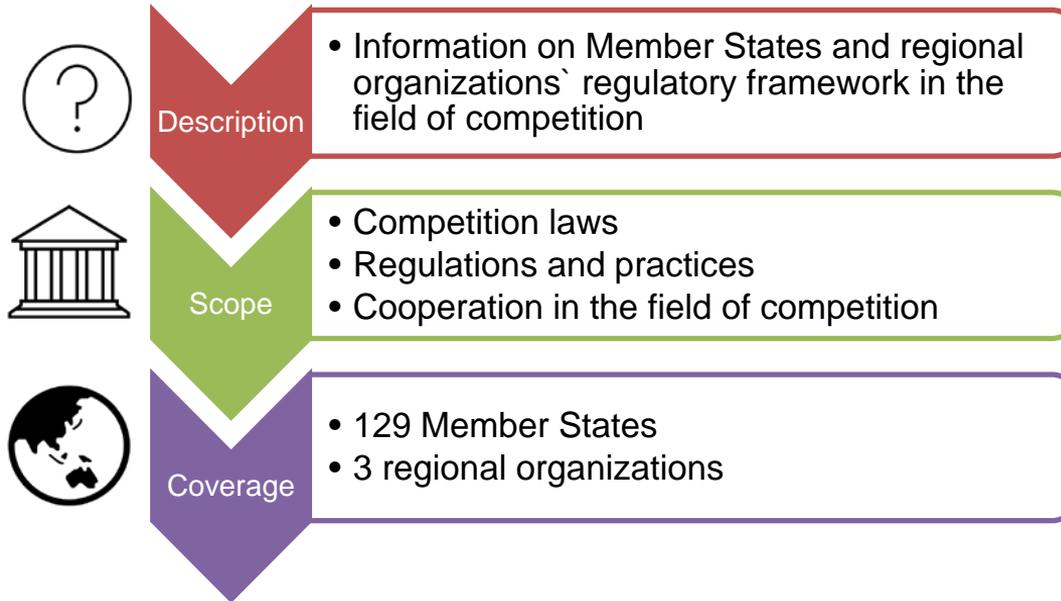
- Examination on whether there is a need for a specific agreement



### Unmanned aircraft

- Examination on whether there is a need to develop guidance for economic regulation of international operations of unmanned aircraft

## ICAO's Competition Compendium



<https://www.icao.int/sustainability/Compendium/Pages/0-default.aspx>

Continous update

## Consumer Protection



### ICAO Compendium on Consumer Protection

- 189 Member States
- 4 regional organizations

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



### Compendia on Emergency Response Planning (ERP)

- 28 Member States
- States are encouraged to update the Secretariat

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

# Aviation Infrastructure Management

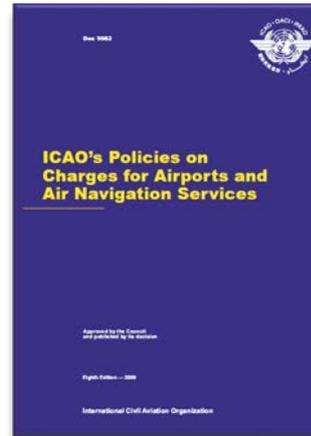
## Aviation Infrastructure Management Programme



Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP)

## ICAO's Policies and Guidance

- **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



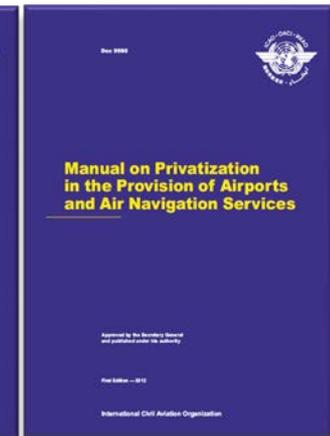
**Doc 9082**



**Doc 9562**



**Doc 9161**



**Doc 9980**

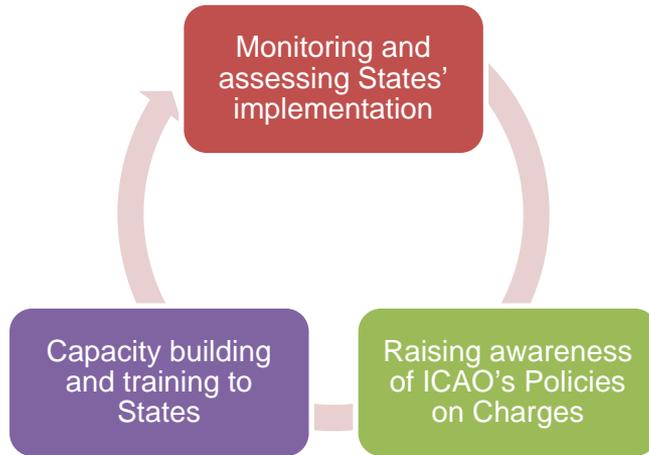
**NEW! Doc 10170** Manual on Economic and Financial Analyses for Aviation Infrastructure Projects



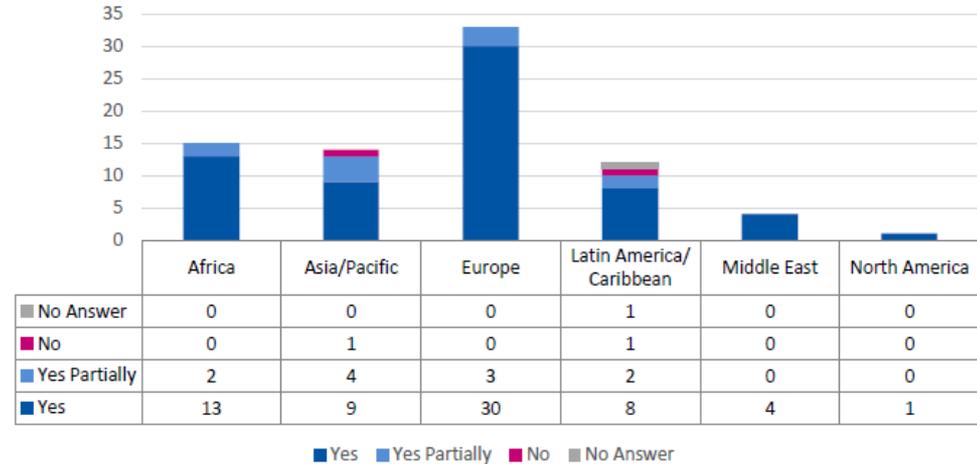
## **Eighth Joint Meeting of the Airport Economics Panel and the Air Navigation Services Economics Panel (AEP-ANSEP/8)**

- Virtual panel meeting held from 29 November to 3 December 2021
- Update of ICAO's policies and guidance on airport and air navigation services economics
- New guidance and tools to support investment decisions of financing aviation infrastructure
- Addressing economic impact of COVID-19 on airports and air navigation services
- Development of guidance on the cost recovery for MET and Space Weather Information Services
- Addressing economic aspects of the UAS and potential funding mechanism

## Enhancing the implementation of ICAO's policies on charges



States' implementation of ICAO's policies on charges for airports and air navigation services (2020)



# Aviation Data and Analysis



## United Nations Sustainable Development Goals – UN SDG



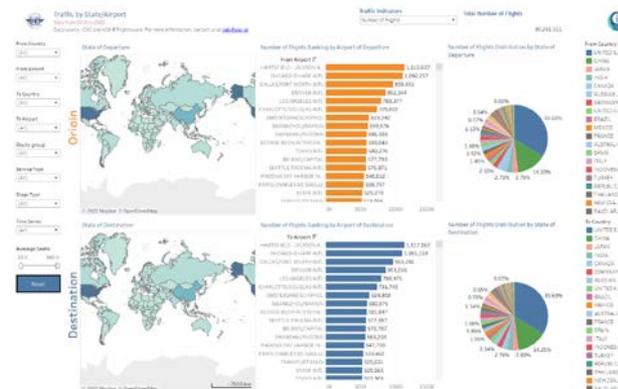
<https://unstats.un.org/sdgs/dataportal/database>

- ICAO is the custodian agency of the UN SDG indicator 9.1.2 on passenger and freight volumes, by mode of transport – collaboration with other agencies (UNCTAD, ITF-OECD) for the provision of rail, road and maritime data
- The data and analysis provided is reflected in the annual global SDG report and in the online UN platform for monitoring the progress towards the SDGs
- This indicator assists ICAO Member States to monitor and benchmark air transport infrastructure and to facilitate related investments. ICAO encourages States to include clear references to the SDGs in their national aviation plans, with the objective of showcasing the contribution of aviation to the UN SDGs and national economies



## Development of traffic dashboards

- Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**
- Cover a **wide array of analytics** ranging from operations, fleet usage, passenger carried, Flight Information Region (FIR) traffic, and revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity
- Dashboards were presented to the ICAO Council in June 2022. Member States have been provided with one free license (refer to State Letter 2022/67 for details on how to access)
- Expected to be valuable to the ICAO Council and Member States in their **current and post COVID-19 pandemic planning and implementation efforts**





## Development of an Aviation Competitiveness Index

### Objectives

- Use a standardized methodology to measure **the level of competitiveness of the aviation sector.**
- The ACWG commonly agreed that the objective of the competitiveness index is **to measure the performance of the aviation of a State and its ability to create and maintain value from the sector.**
- The measurement of aviation competitiveness using standard methodologies will assist States in learning successful experiences and act appropriately in improving their competitiveness and **leveraging optimally the social-economic benefits of aviation.**

### Results

- Aviation Competitiveness index can drive outcomes and be a core lever for policy interventions.
- Aviation Competitiveness working group progress was presented to the Eleventh Session of the Statistics Division in April 2022.



## Development of an Aviation Satellite Account (ASA)

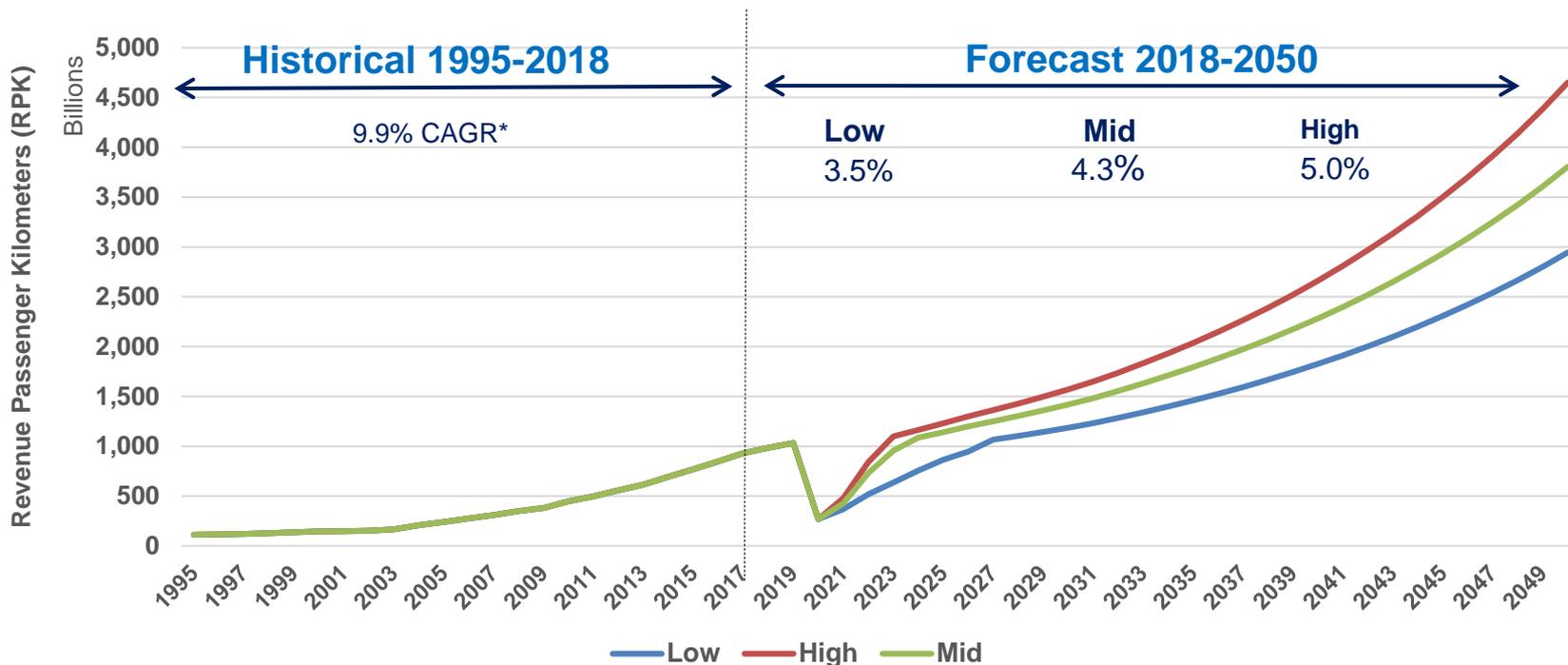
### Objectives

- Aim to **measure the economic impact of aviation on national economy** in line with the *System of National Accounts, 2008 (SNA)*.
- Assist States to make **data-driven policy-making and evaluation for aviation development planning** that is linked with national and/or regional development frameworks and strategies.

### Results

- Working groups have been undertaken by the Expert Advisory Group (EAG) established under the Aviation Data and Analysis Panel (ADAP) to develop the ASA, with experts from Member States, the United Nations Statistics Division (UNSD) and other international organizations.
- Presented the vetting of the methodology and assessment on the inclusion of aircraft manufacturing to the Eleventh Session of the Statistics Division in April 2022.
- Future work is required to draft ASA`s methodological framework document by incorporating a new chapter to provide flexibility for States to capture the economic contribution of aircraft manufacturing.

## Middle East long term traffic forecasts (RPK, Passenger)



\*CAGR: Compound annual growth rate

# Upcoming Events



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# Upcoming Events

## ICAN2022

Abuja, Nigeria

5-9 December 2022

Hosted by the Nigerian Civil Aviation Authority



2022 ICAO Air Services Negotiation Event  
Abuja, Nigeria | 5-9 December 2022

**ICAN2022**





## Actions by the DGCA

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### 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;
- encourage States to apply and follow ICAO's policies and guidance on infrastructure management including the charging policies;
- encourage States to provide statistics required by ICAO in a timely manner;
- encourage States to use ICAO data, tools and analysis; and
- encourage States to actively participate in the ICAO upcoming meetings.



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**Thank You**