



| ICAO

INTERNATIONAL CIVIL AVIATION ORGANIZATION

A UN SPECIALIZED AGENCY



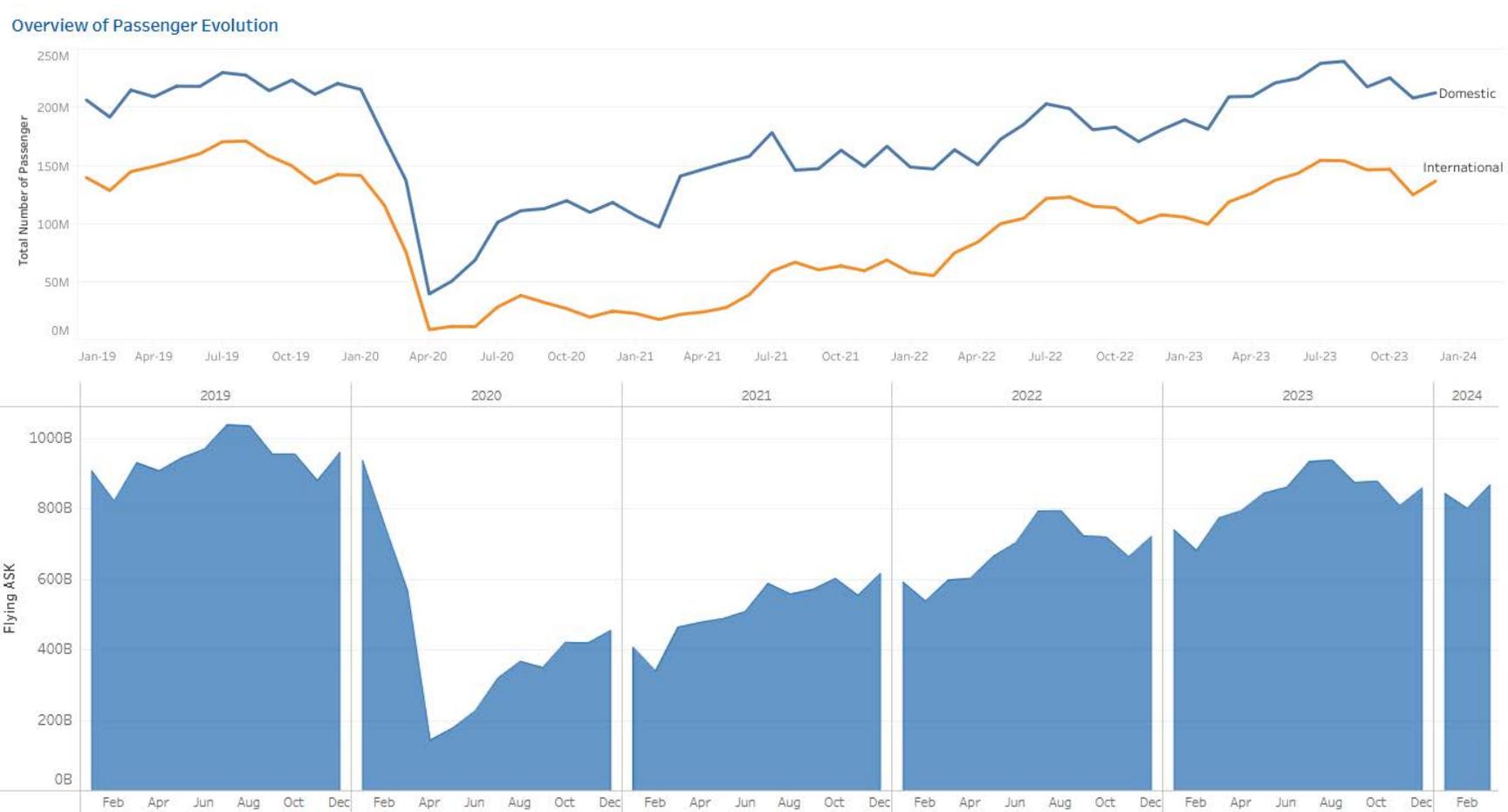
SEVENTH MEETING OF THE DIRECTORS GENERAL OF CIVIL AVIATION
MIDDLE EAST REGION (DGCA-MID/7)

Agenda item 7: Economic Development of Air
Transport
Air Transport Updates

International Civil Aviation Organization (ICAO)

State of the Industry

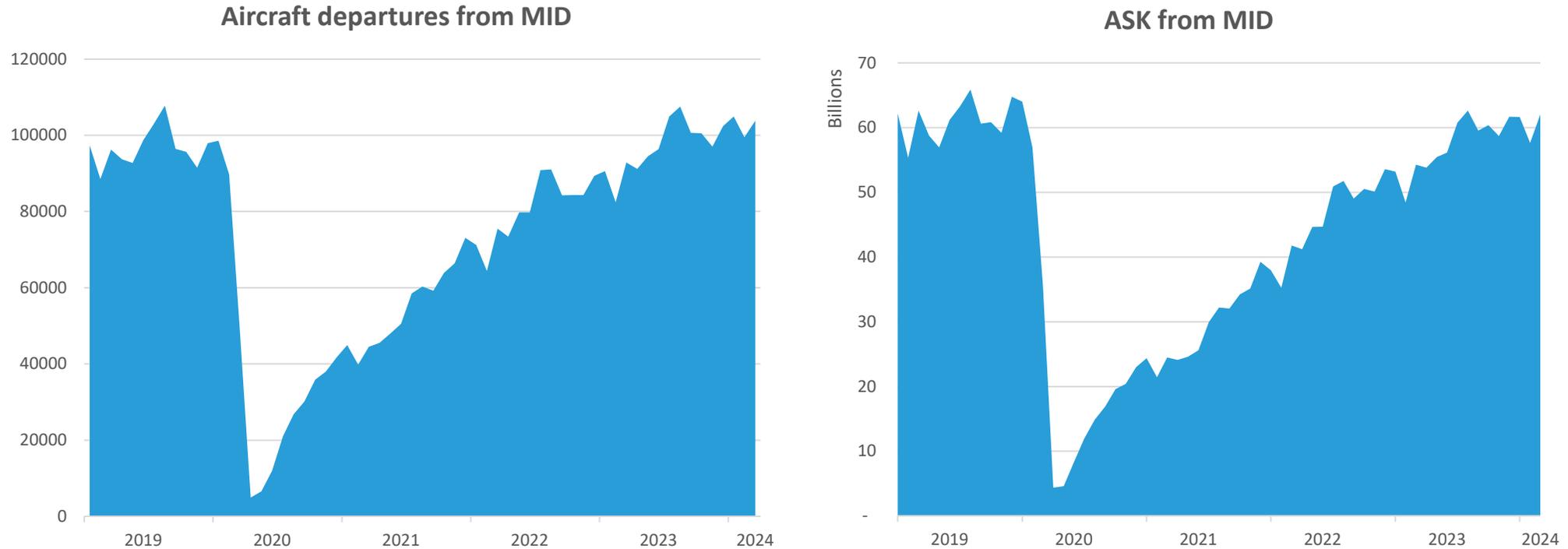
Global Air traffic recovery near pre-pandemic levels



✈️ ICAO’s latest analyses reveal that air transport seat capacity and passenger totals globally have reached the pre-pandemic levels in Q1 2024

Source: ICAO Big Data dashboards and analysis

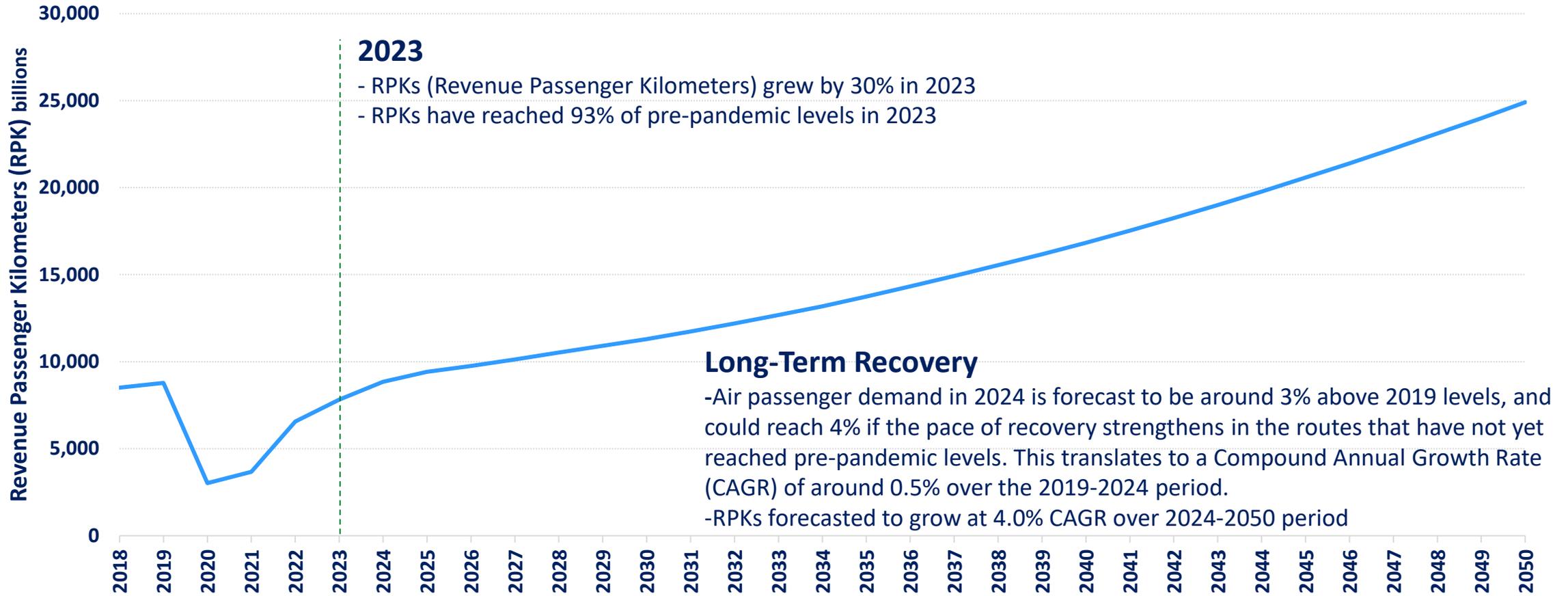
MID Traffic - 2019 to 2024



- MID Passenger traffic in departure volume and Available-Seat-Kilometers (ASK) shows constant recovery since the pandemic shock in 2020.
- Departure volume for the first 3 months of 2024 surpassed 2019 levels.
- ASK from MID surpassed 2019 level in the first 3 months of 2024.

Source: ICAO Big Data dashboards and analysis

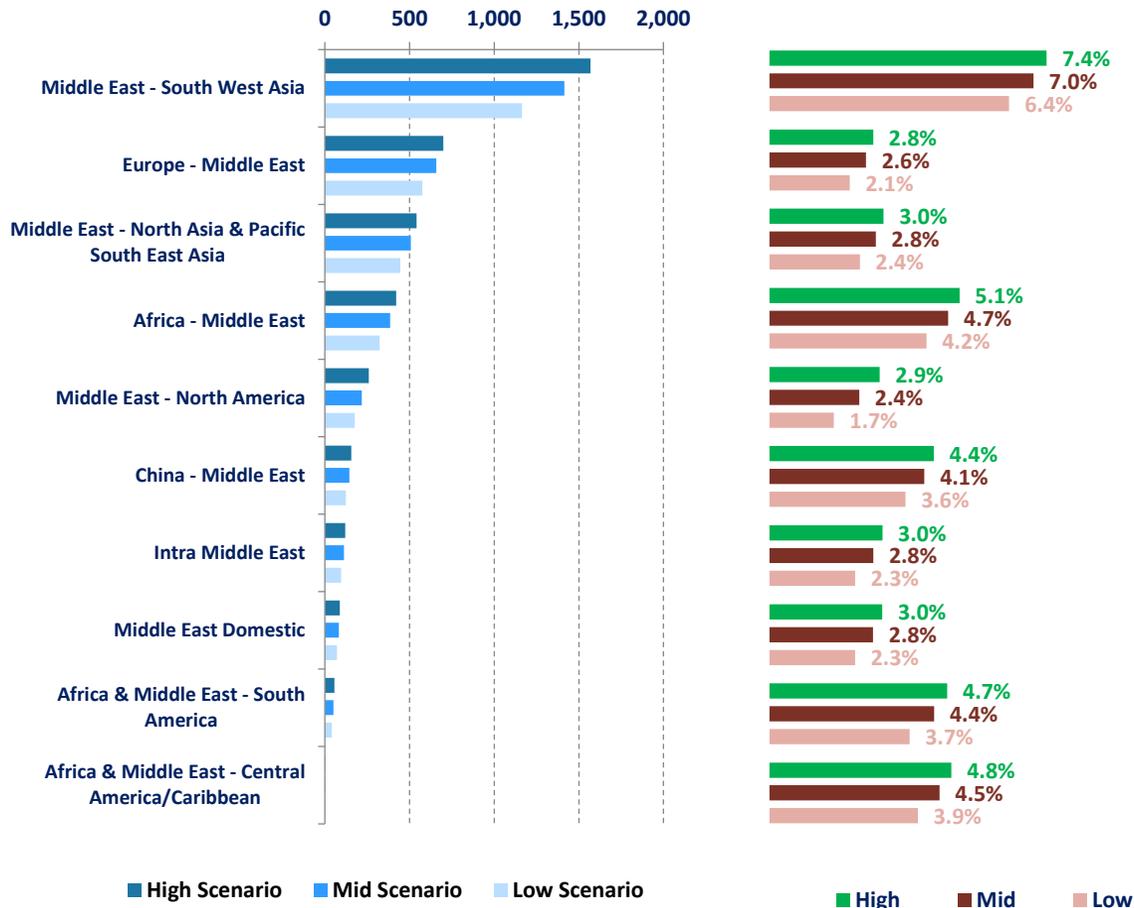
Long-Term Traffic Forecast (RPKs)



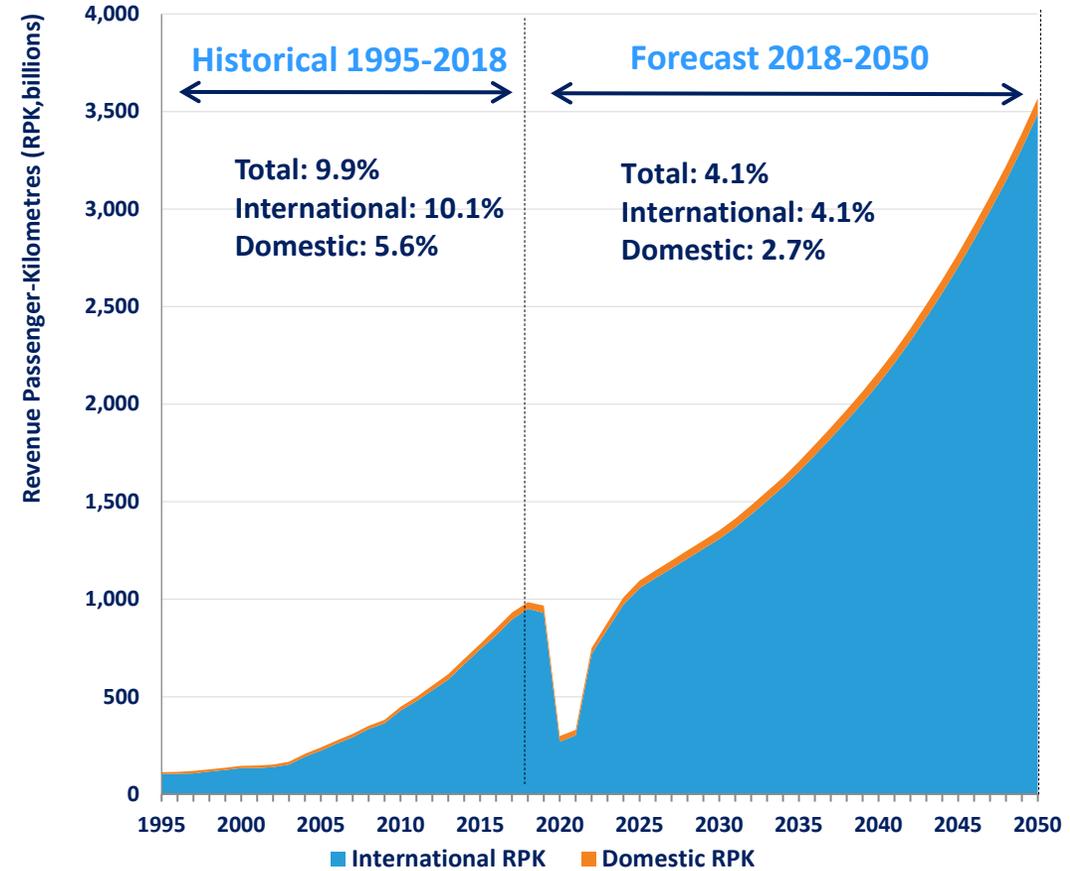
MID Region Forecast

Revenue Passenger-Kilometres (RPK, billions)

CAGR 2018-2050



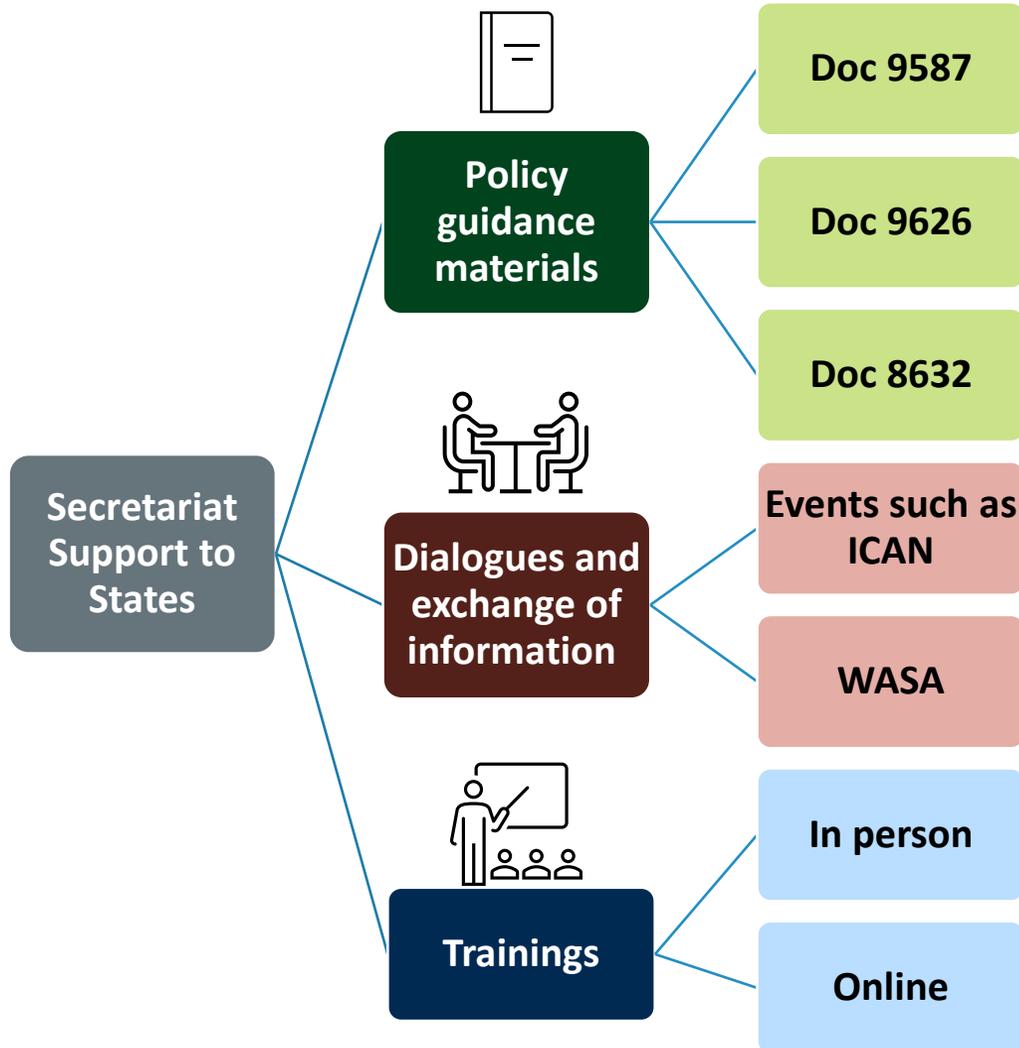
Middle East (mid Scenario)



Air Transport Policy and Regulation

ICAO's Long-term Vision for International Air Transport Liberalization ⁹

✈ 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"



Doc 9587



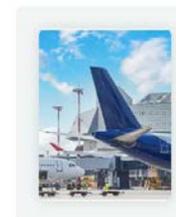
Doc 9626



Doc 8632



Self-paced Training
Air Transport Economics (ATE)
Offered in English only



Self-paced Training
Air Transport Economics for
Airport Professionals



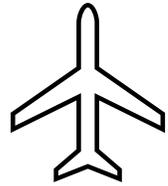
Self-paced Training
Air Transport Regulation (ATR)
Offered in English only



Self-paced Training
Air Transport Regulations Issues
(ATRI)

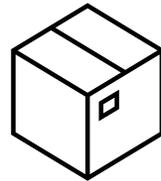
Ongoing works by the Air Transport Regulation Panel (ATRP)

✈ ATRP/17 was held from 16 to 18 April 2024



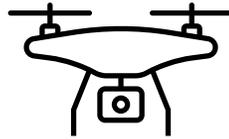
Airline ownership and control

- Address the remaining issues of concern on draft Convention on Foreign Investment in Airlines



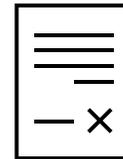
Liberalization of air cargo

- Examination of whether there is a need for a specific agreement to further liberalize air cargo services



Unmanned aircraft

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



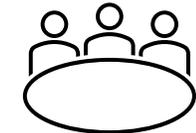
Response to crisis

- Develop guidelines to temporarily respond to international crises, whilst protecting the integrity of Air Services Agreements (ASAs)



Article 15 of Chicago Convention

- Ensure that Article 15 of the Convention is fully respected



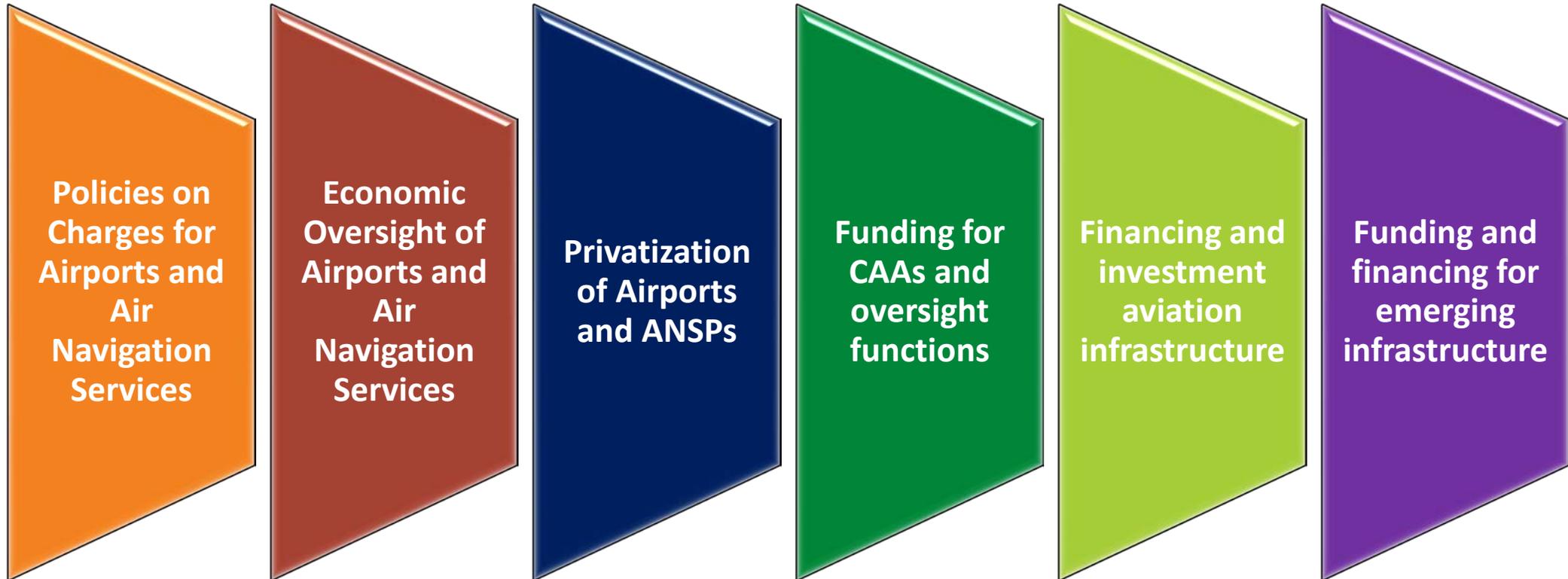
Seventh Worldwide Air Transport Conference

- ATConf/7 proposed to be held in 2026
- Deliberate on the draft agenda of items of ATConf/7

Aviation Infrastructure Management

Aviation Infrastructure Management

Promoting the efficient development of aviation infrastructure



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

Recommendations of the Ninth Joint Meeting of the Panels (AEP-ANSEP/9)

Charging policies	Key charging principles	Article 15 of Chicago Convention	Economic oversight of multinational airports	“Black swan” events	Funding for CAA	Emerging infrastructure funding needs	Invoicing of air navigation service charges
<ul style="list-style-type: none">• Update of ICAO’s Policies on Charges for Airports and Air Navigation Services (Doc 9082)	<ul style="list-style-type: none">• Develop definitions on the key charging principles	<ul style="list-style-type: none">• Incorporate Article 15 in Doc 9082, particularly concerning the issue of fees and charges for granting access to airspace	<ul style="list-style-type: none">• Economic oversight of service providers owned and operated by transnational entities	<ul style="list-style-type: none">• Develop a standalone document on “black swan” events	<ul style="list-style-type: none">• Global survey on sustainable funding for oversight functions	<ul style="list-style-type: none">• Funding mechanisms for UAS, AAM, commercial space transportation launches	<ul style="list-style-type: none">• Guidance on invoicing air navigation services charges

Aviation Data and Analysis

The fourth meeting of the Aviation Data and Analysis Panel (ADAP/4)

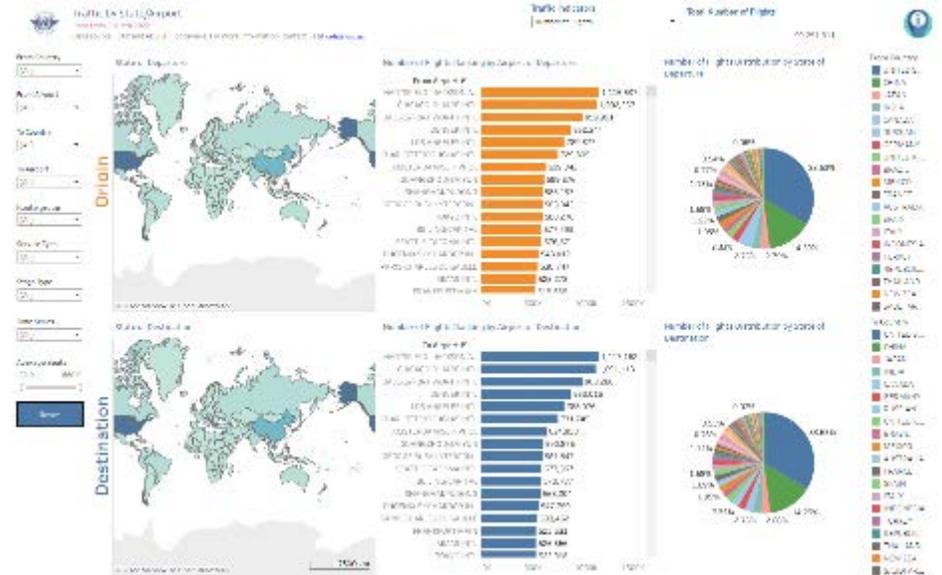
✈ At ICAO Headquarters in Montréal from 5 to 8 September 2023

Agenda items:

1. Report on the outcome of the 41st Session of the Assembly
2. Report on the Eleventh Session of the Statistics Division (STA/11)
3. Presentation of the Aviation Satellite Account (ASA) methodological framework
4. Review the methodologies and reporting with respect to the ICAO Statistics Programme
5. Development of methodologies to collect, process and analyze Big Data
6. Update of the long-term traffic forecasts
7. Examination of a proposed Global Aviation Competitiveness Index
8. Report of the on-going collaboration with the Universal Postal Union (UPU)

ICAO Traffic and Economic dashboards

- ✈ Interactive dashboards developed using Tableau platform, which provide **visualization** and **customized querying capabilities**.
- ✈ Covering a **wide array of analytics**:
 - operations;
 - fleet usage;
 - passenger carried;
 - Flight Information Region (FIR) traffic;
 - revenue impact on airlines, airports and air navigation services providers (ANSPs) at different levels of granularity.
- ✈ Each Member States has been provided with a free license.



ICAO's support to States

ICAO's capacity building support to States

Online training

Air Transport Regulation online course

Air Transport Regulation Issues online course

Air Transport Economics online course

Air Transport Economics for Airport Professionals online course

Classroom/Virtual training

Joint ICAO-ACI training on Airport User Charges

Regional workshop/seminar

Presentation on Consumer Protection and Air Transport Quality during Air Transport Forum organized by Saudi Arabia and Arab Civil Aviation Organization (ACAO) in December 2023



Thank You!