

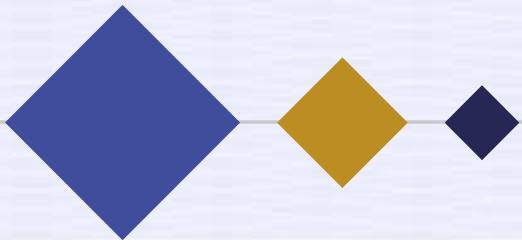


State of The Industry

Abdul Wahab Teffaha
Secretary General

حالة الصناعة

عبد الوهاب تفاع
الأمين العام



لم تصدق التوقعات حول عودة نشاط النقل الجوي

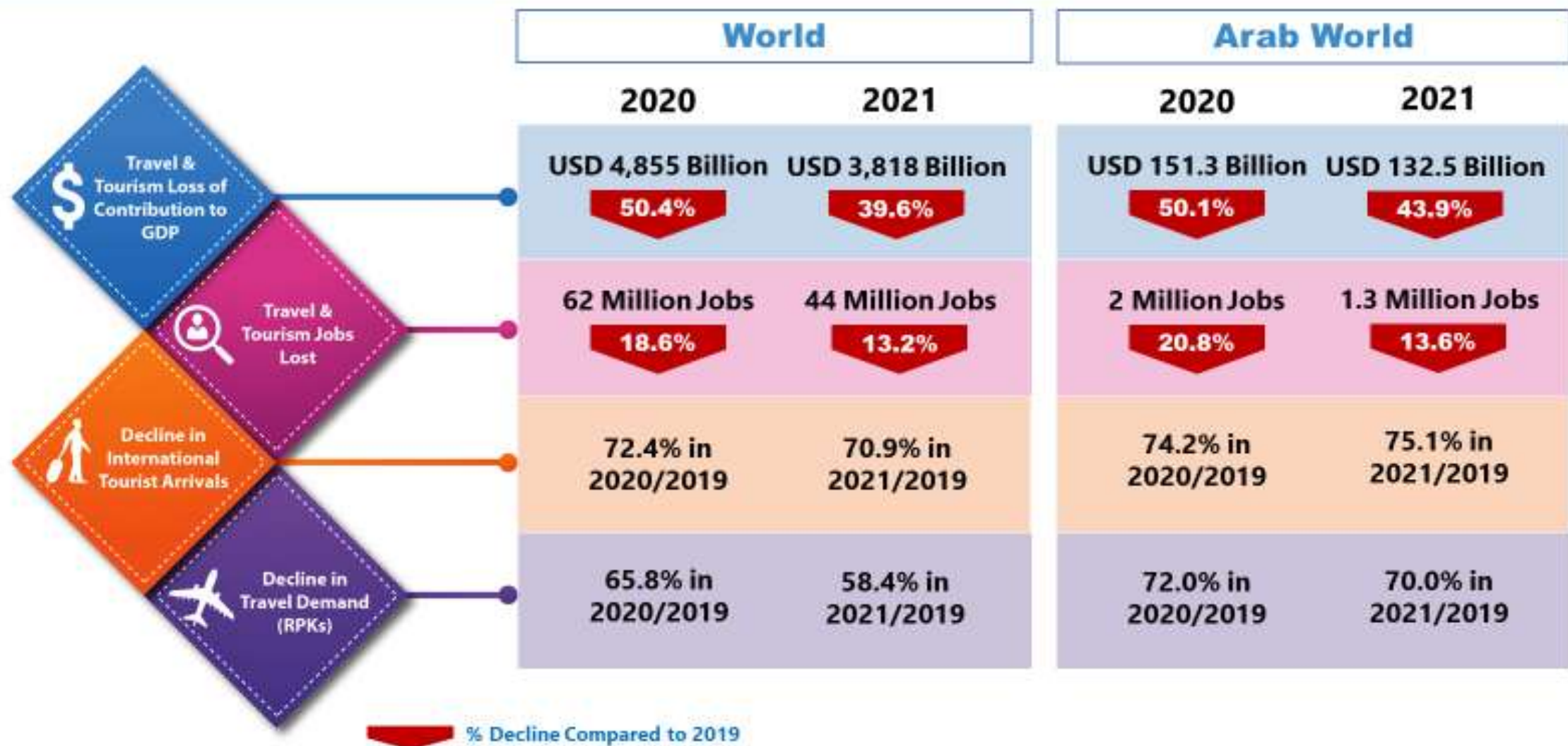


Forecasts about the return of air transport activity were incorrect

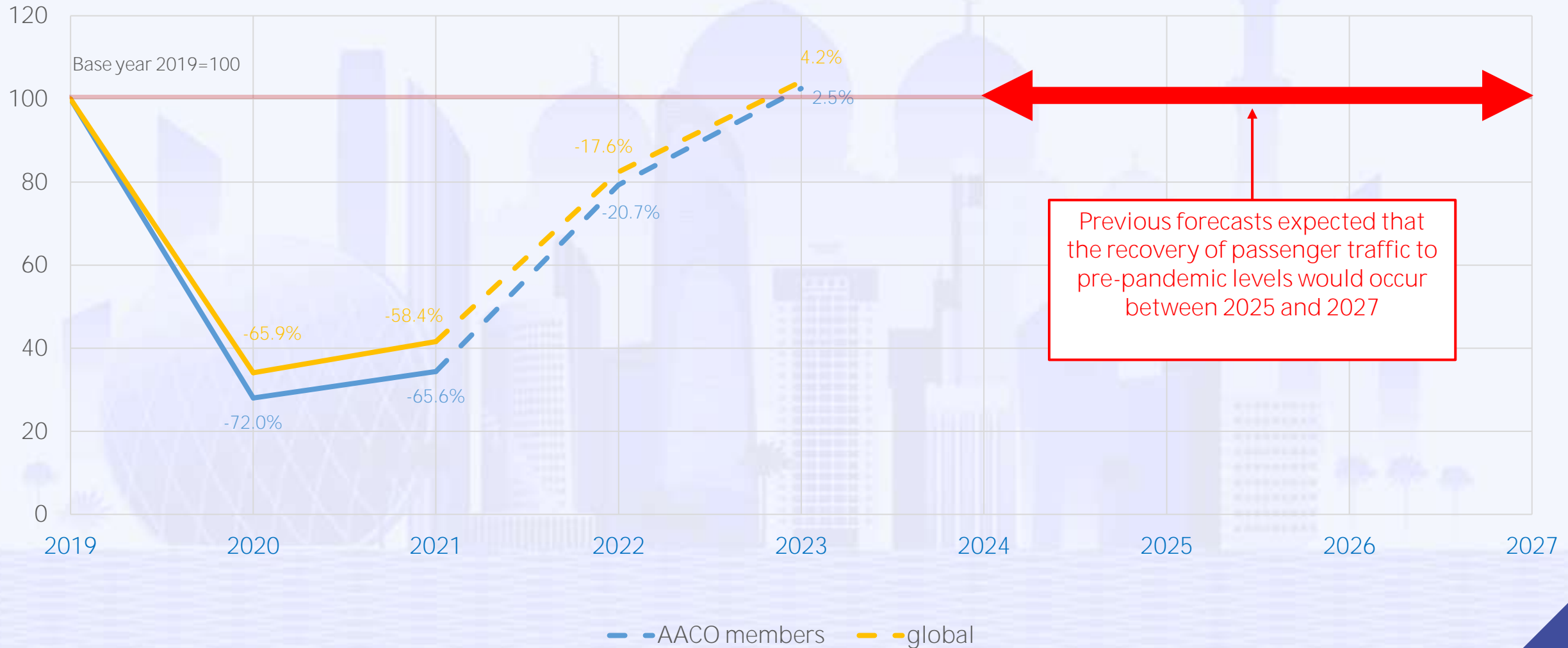




Loss of Contribution of Travel & Tourism in 2020 and 2021 Compared to 2019 Levels



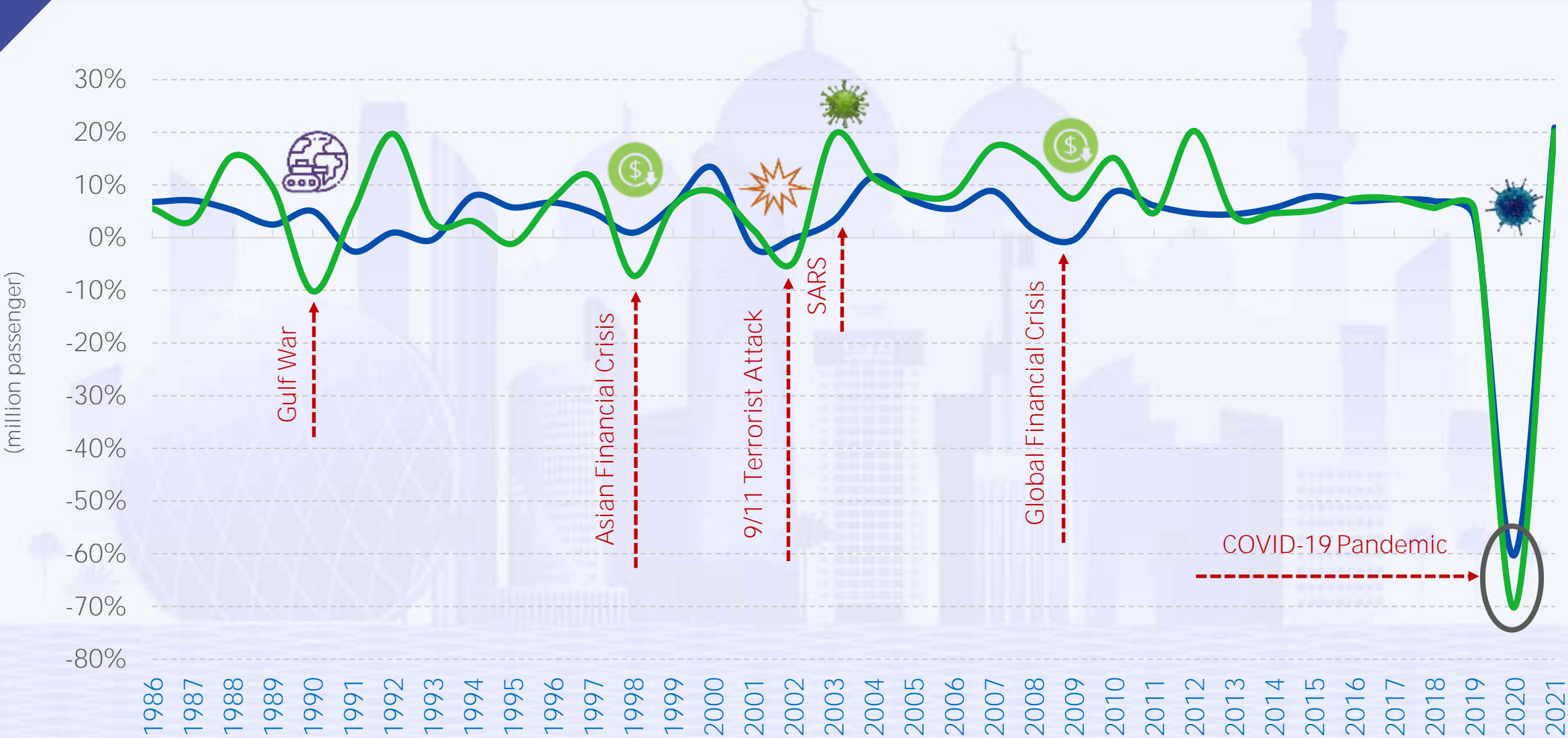
The Recovery of Passenger Traffic from COVID-19 Crisis, Globally and for AACO Members, is Expected to Occur in 2023*



*Data points compared to base year 2019
Dotted lines represent estimates

Source: IATA, AACO

Impact of COVID-19 and Previous Crises on the Global Passenger Traffic



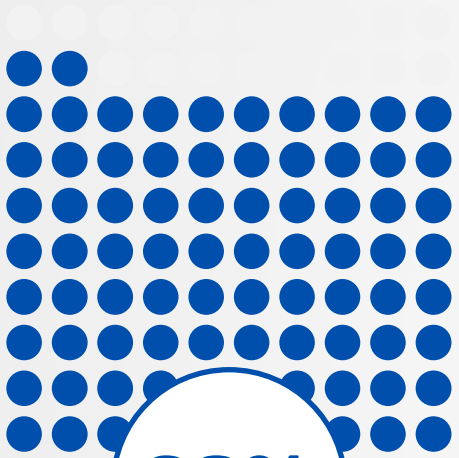
*Projections

Industry

Arab Market

Source: IATA, AACO

↓ 17.6%

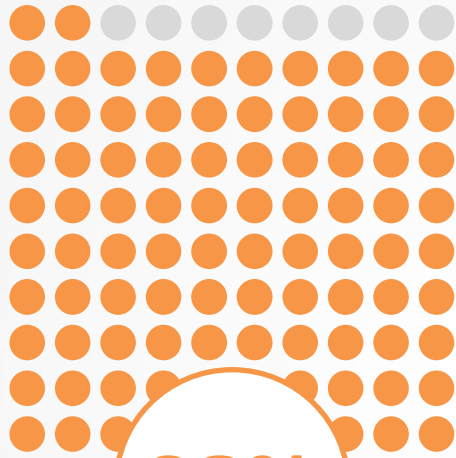


82%

Revenue Passenger
Kilometers (RPKs)



↓ 8%

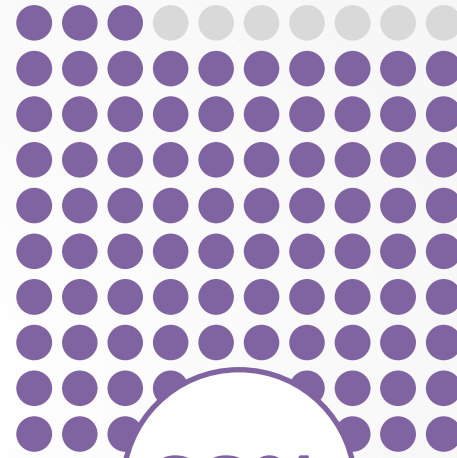


92%

Employment



↓ 7%

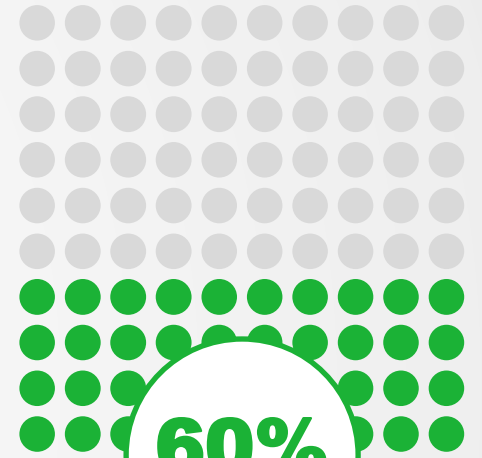


93%

Revenues



↓ 40%



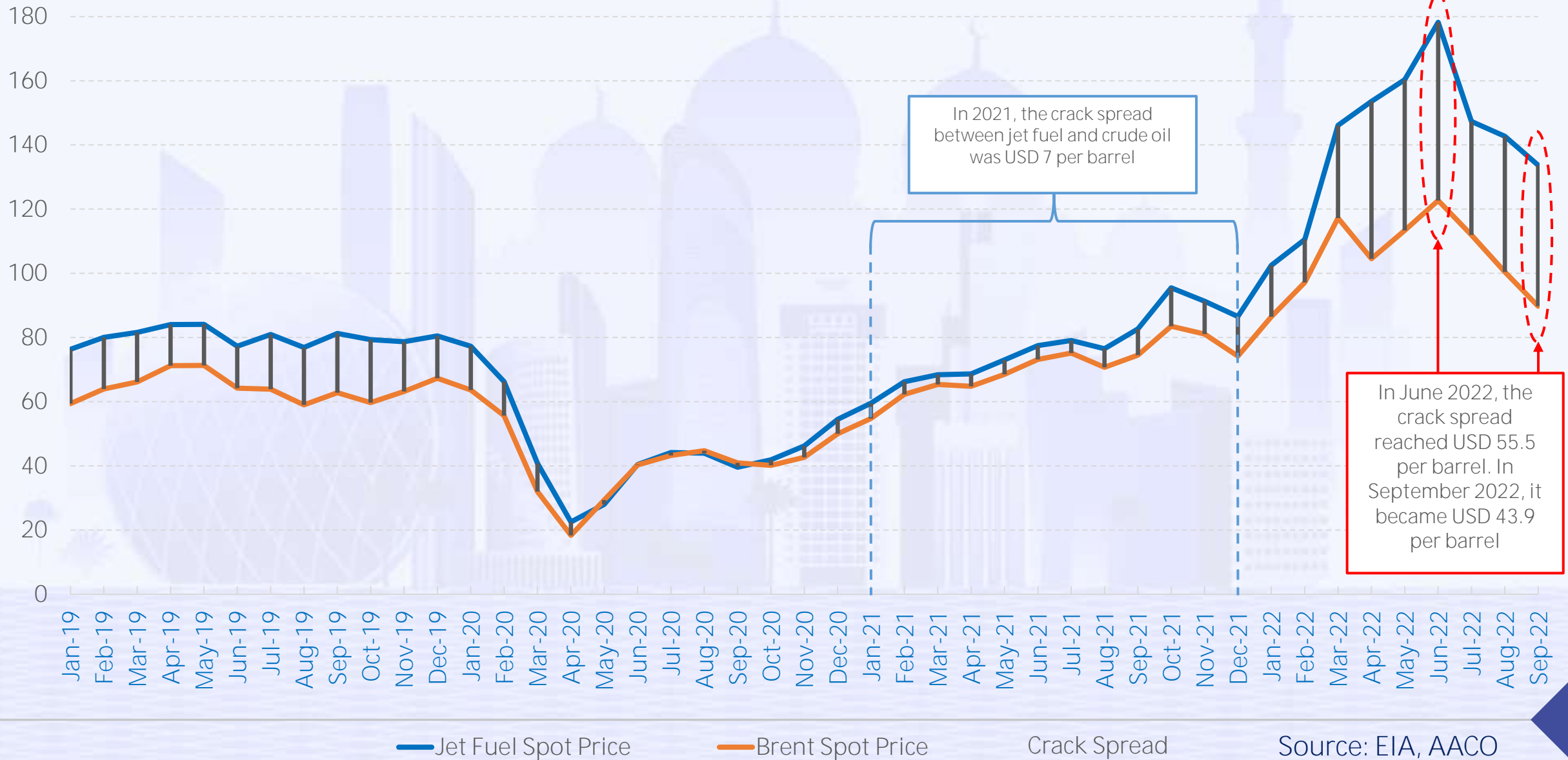
60%

International
Tourist Arrivals



In 2022, the price of jet fuel is expected to reach around USD 125.5 per barrel, an increase of 57.7% compared to 2019

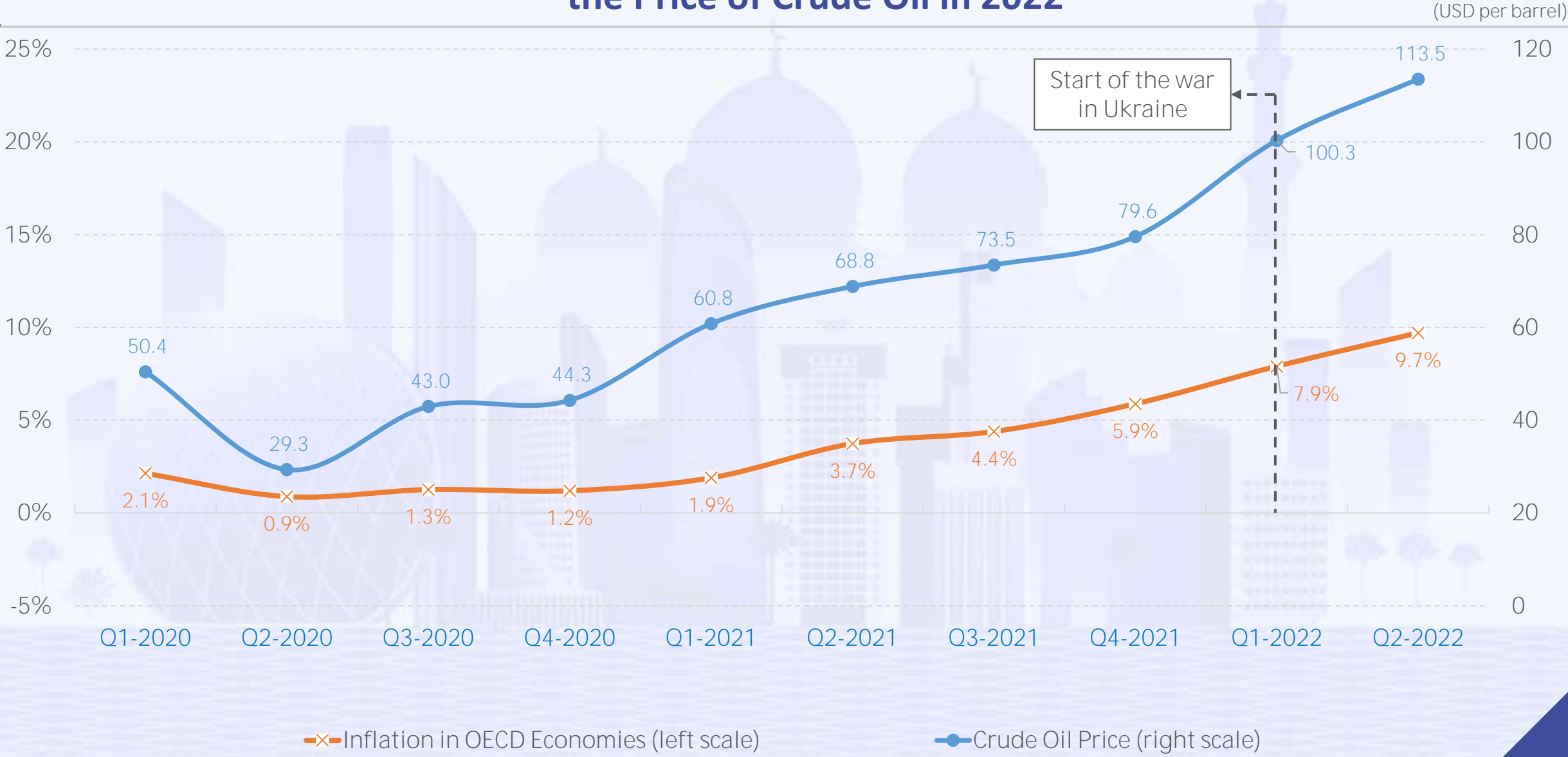
(USD per barrel)



Source: EIA, AACO

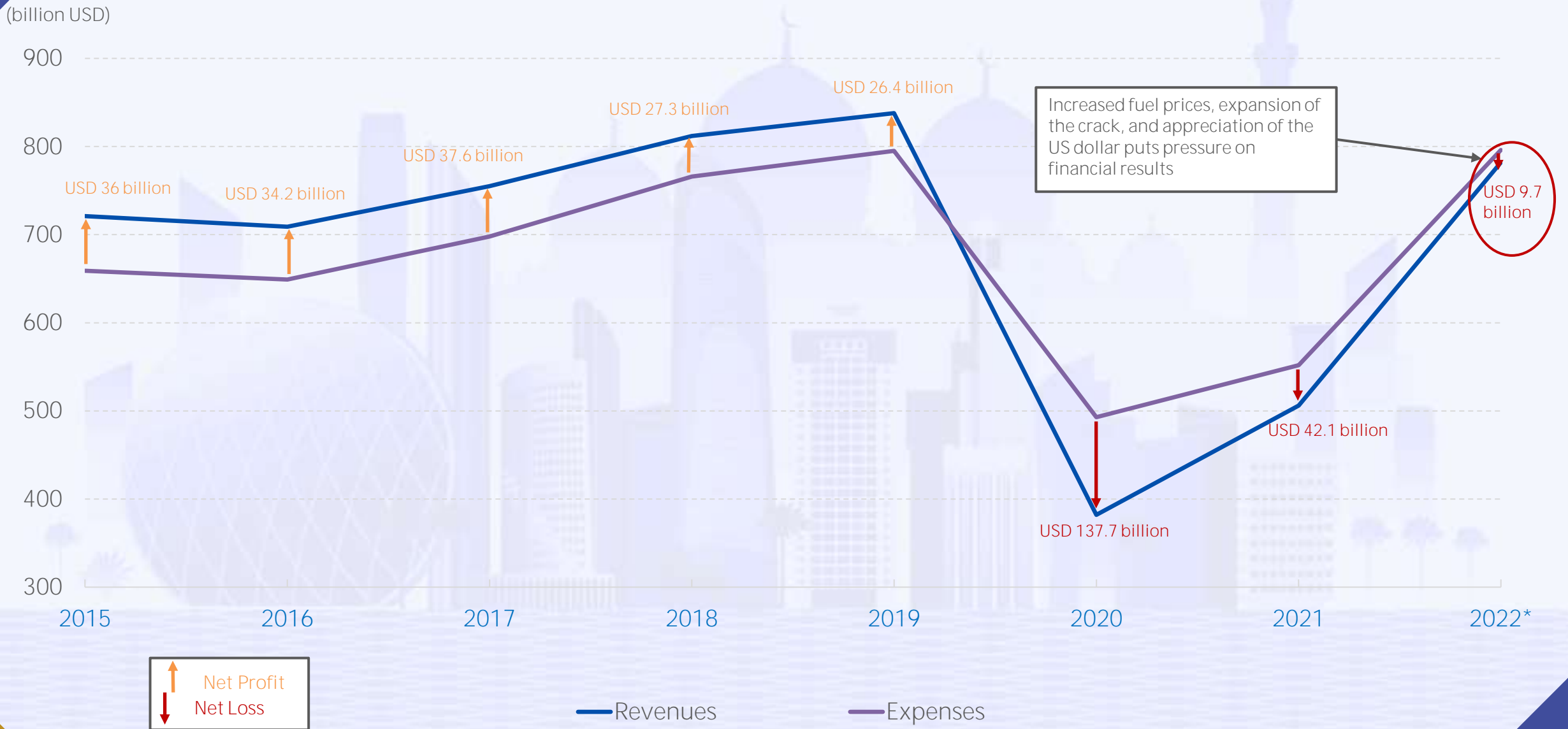


Quarterly Year-on-Year Change in the Inflation Rate in OECD Economies and Increase in the Price of Crude Oil in 2022



Source: AACO and various sources

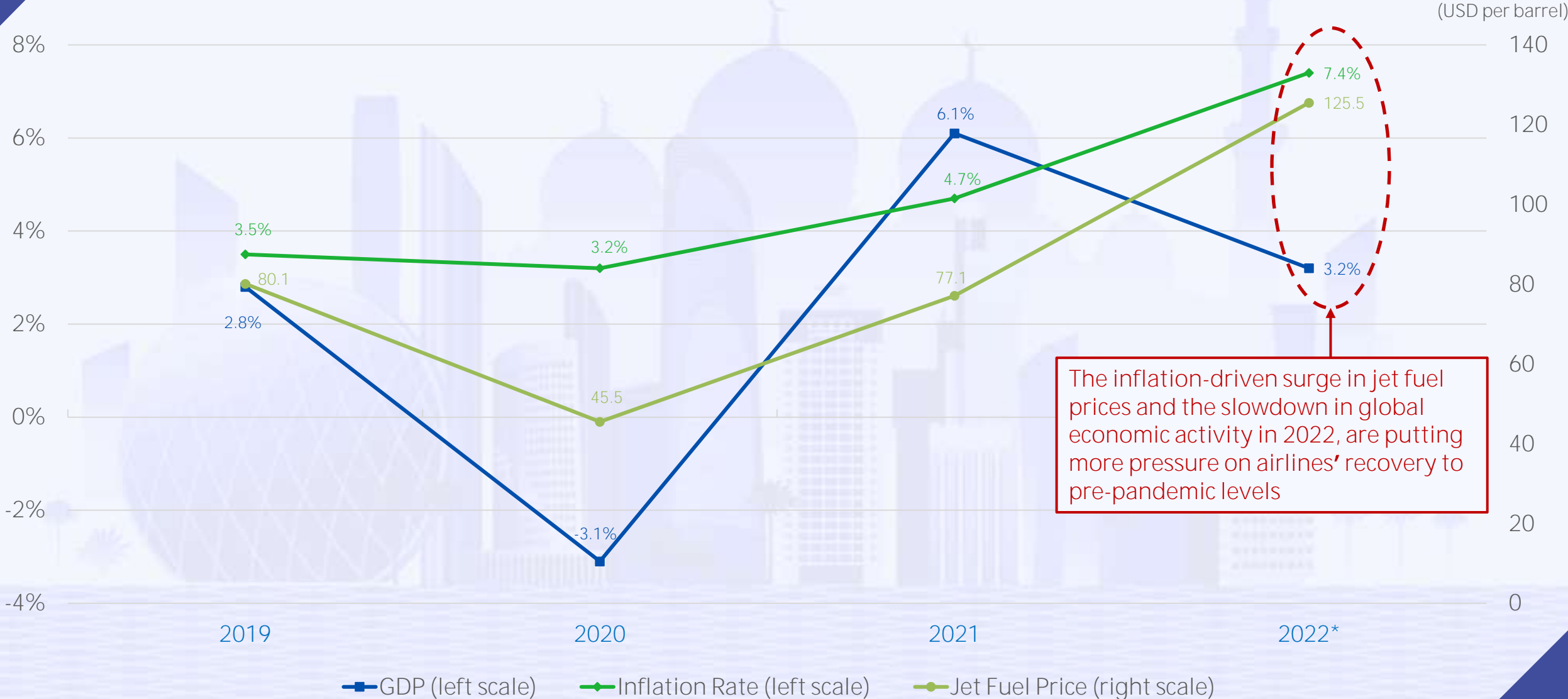
The Financial Performance of the Air Travel Industry



*Projections

Source: IATA, AACO

The Financial Performance of the Air Travel Industry



*Projections

Source: IATA, AACO







Governments' Dealing with a Global Crisis

التعاطي الحكومي مع أزمة عالمية



نتمنى على الحكومات القيام بالخطوات التالية

احترام اتفاقيات الخدمات
الجوية

عدم اللجوء الى إجراءات
انفرادية فيما يتعلق
بالخدمات الجوية

اعتماد إجراءات الـ CART
واعتمادها كإجراءات
قياسية

إعادة احياء الشهادة
الصحية الدولية بشكل
رقمي

We call upon governments to take the following steps

Revive int'l health
certificate in a digital
form

Adopt CART
guidelines as
standard procedures

Avoid taking
unilateral measures
regarding air services

Respect int'l air
services agreements

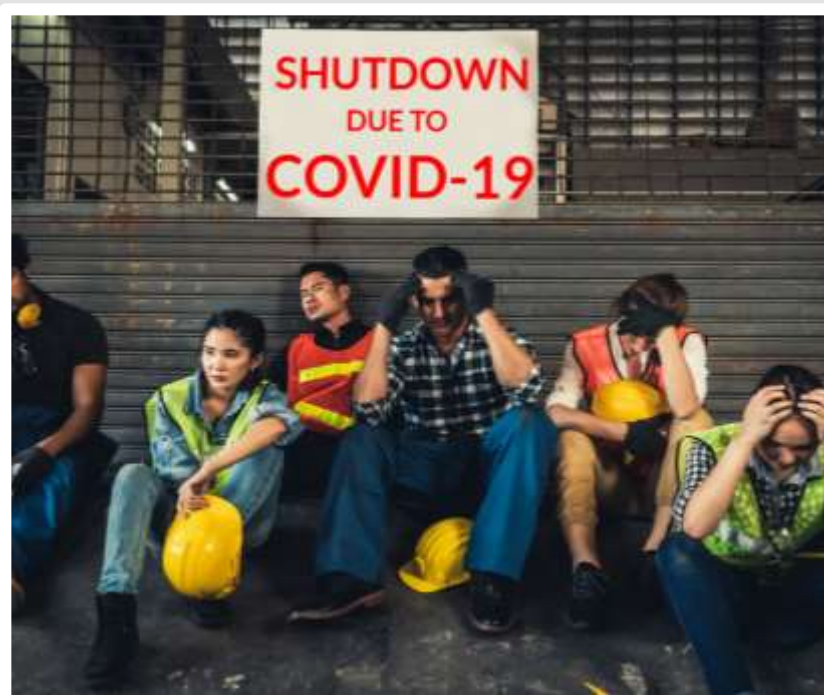
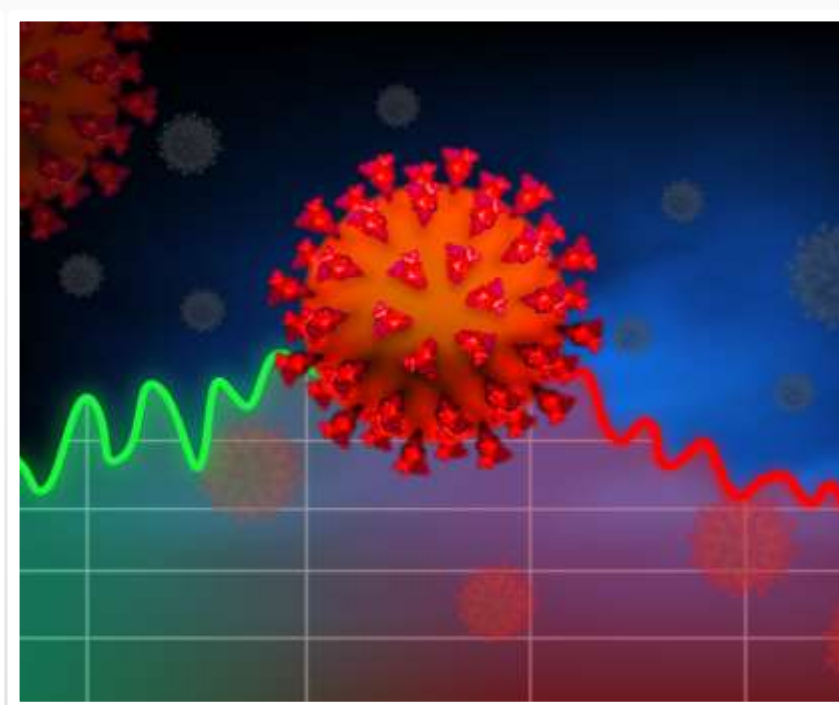


To arrive at int'l biosafety standards adopted by governments

لإيجاد معايير دولية للسلامة الصحية تتبناها الحكومات







aac 

الإتحاد العربي للنقل الجوي
arab air carriers' organization



The Level of Technological Advancement

مستوى التطور التكنولوجي



The Level of Technological Advancement

مستوى التطور التكنولوجي



The Level of Technological Advancement

مستوى التطور التكنولوجي

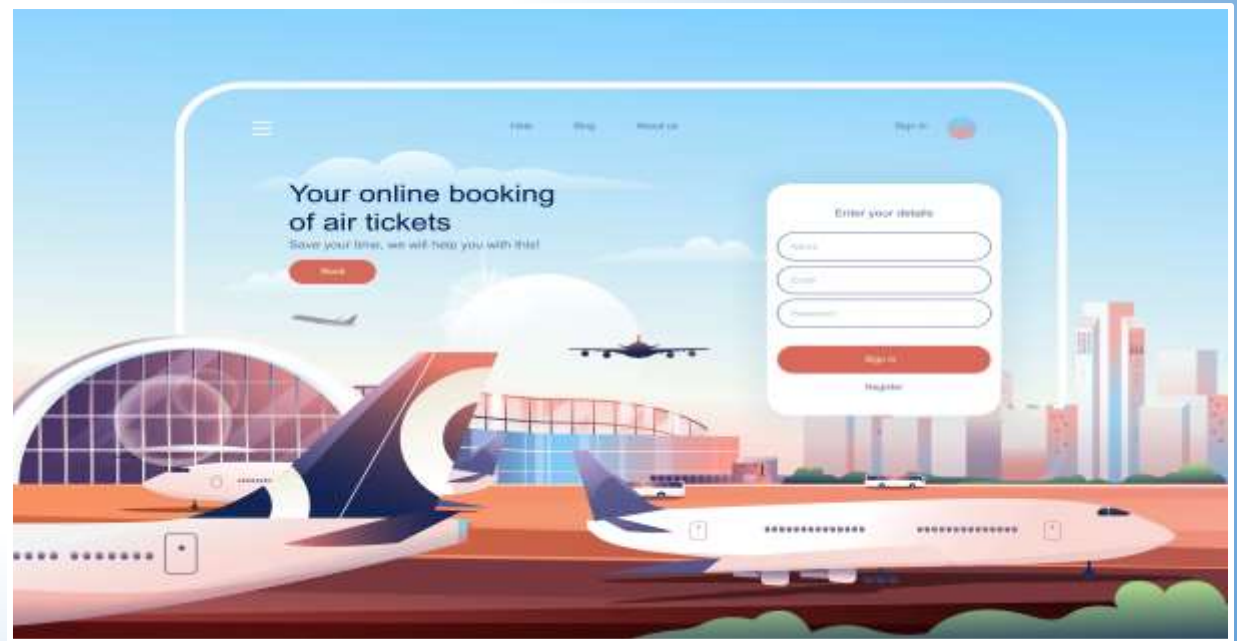


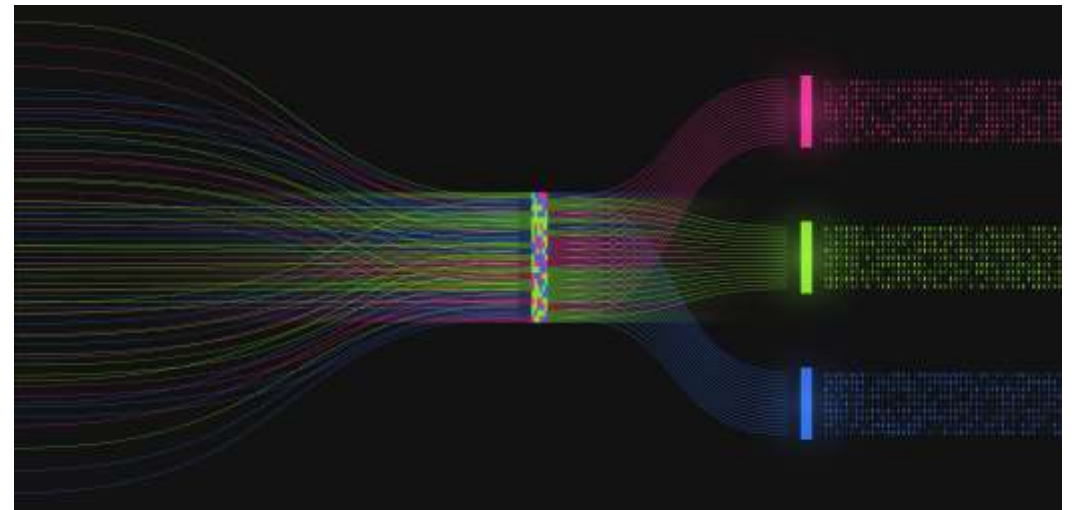


A close-up, low-angle shot of a person's hands typing on a laptop keyboard. The scene is set against a dark, starry background, suggesting a digital or futuristic environment. The lighting is soft, highlighting the keys and the hands. The overall mood is one of focused activity in a high-tech setting.

التحول الرقمي هو احد أولويات الصناعة

Digital transformation is at the top of the priorities of the industry

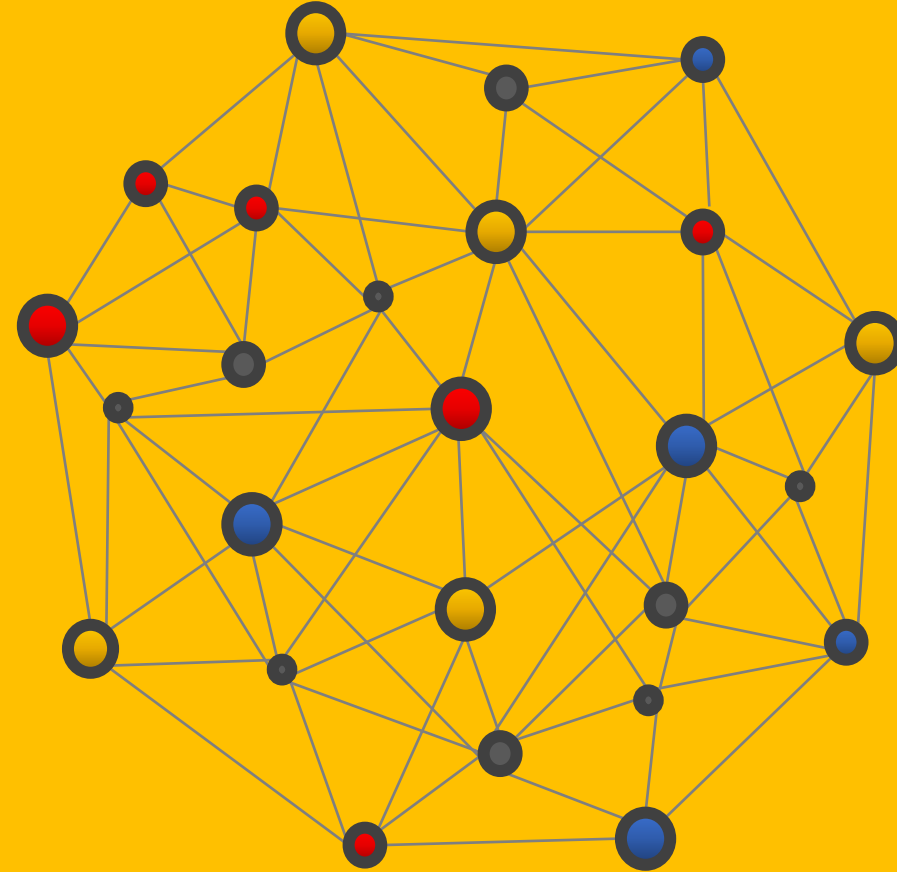




بيئة مركزية



بيئة لامركزية



CENTRALIZED



DECENTRALIZED

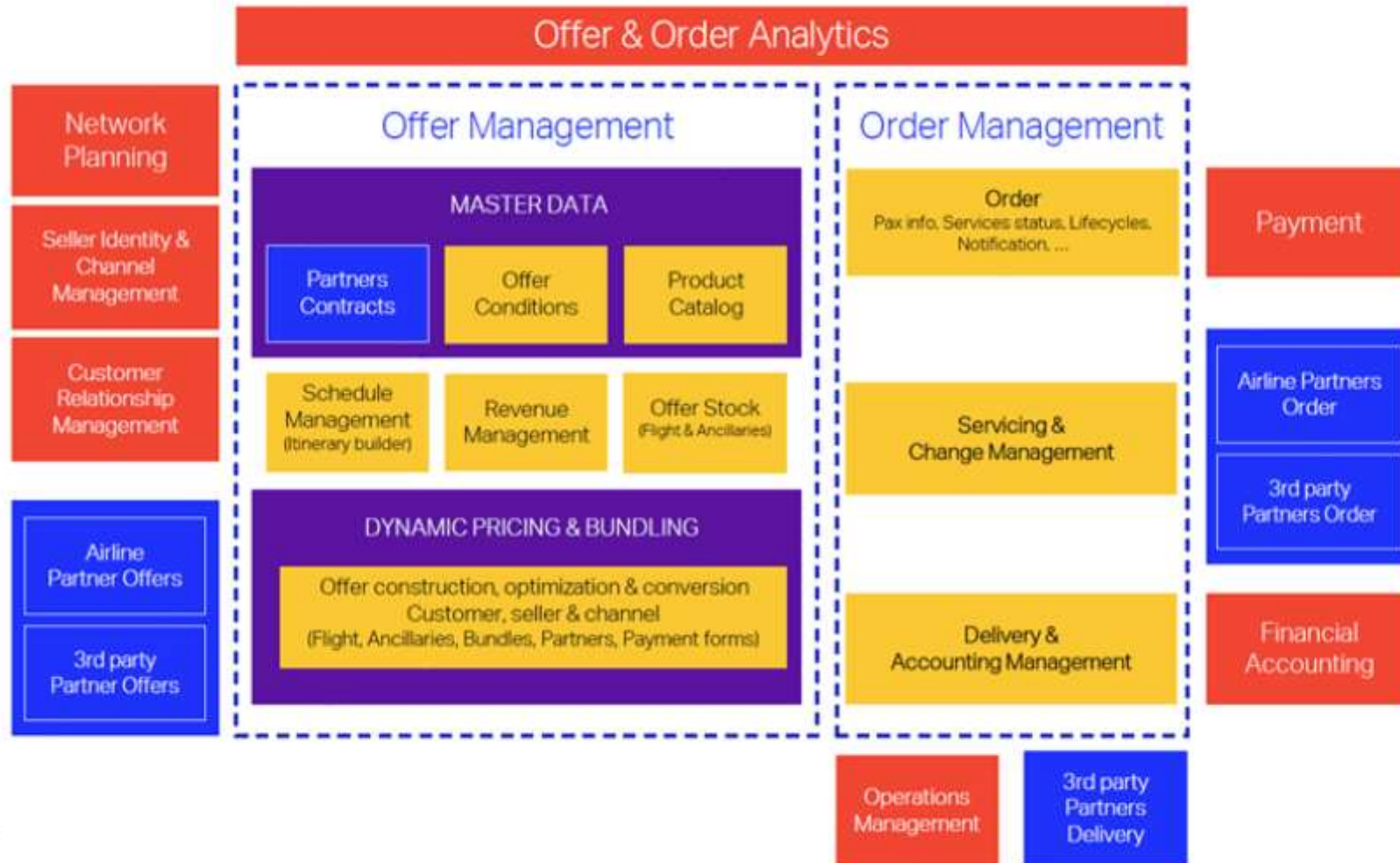
I AM NOT A NUMBER !



Passenger Name Record (PNR) is a unique 10 digit number that links details of passengers to booking database. It can be used to avail services like retiring room, lodge complaints or seek assistance in of emergency.



End state platform: offer & order management





التعامل بين شركة الطيران والمسافر ضمن بيئة
سوق سفر واحدة بدل من التنقل بين عدة مواقع

The customer can fulfil his
requirements in a travel market

الاستفادة من الهوية الرقمية للمسافر لبناء علاقة
دينامية

Build dynamic relationship based on
the customer digital identity

قيام الحكومات باستبدال التحقق الحسي الورقي
بالتحقق الرقمي

Governments to change physical
validation with a digital one



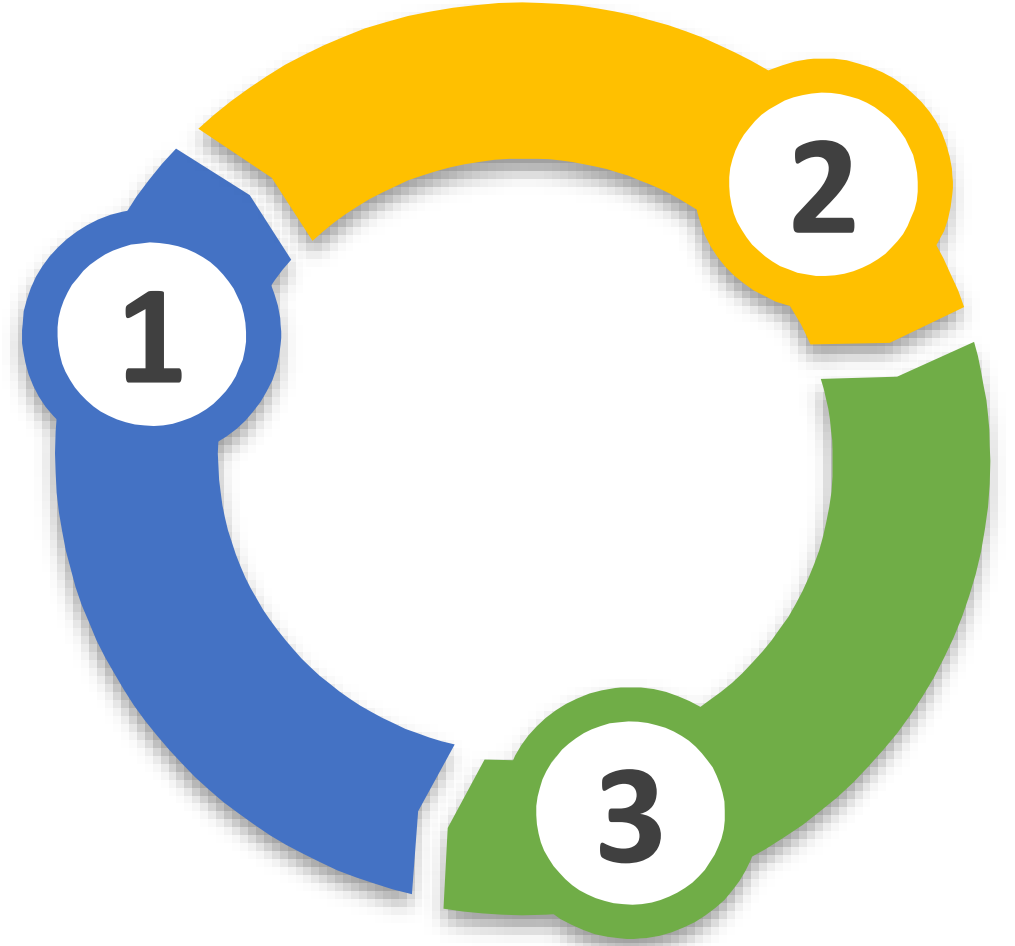








ثلاث محاور رئيسية



Three primary pillars



الهدف الطموح البعيد المدى لصناعة النقل الجوي

Aviation Long-Term Aspirational Goal

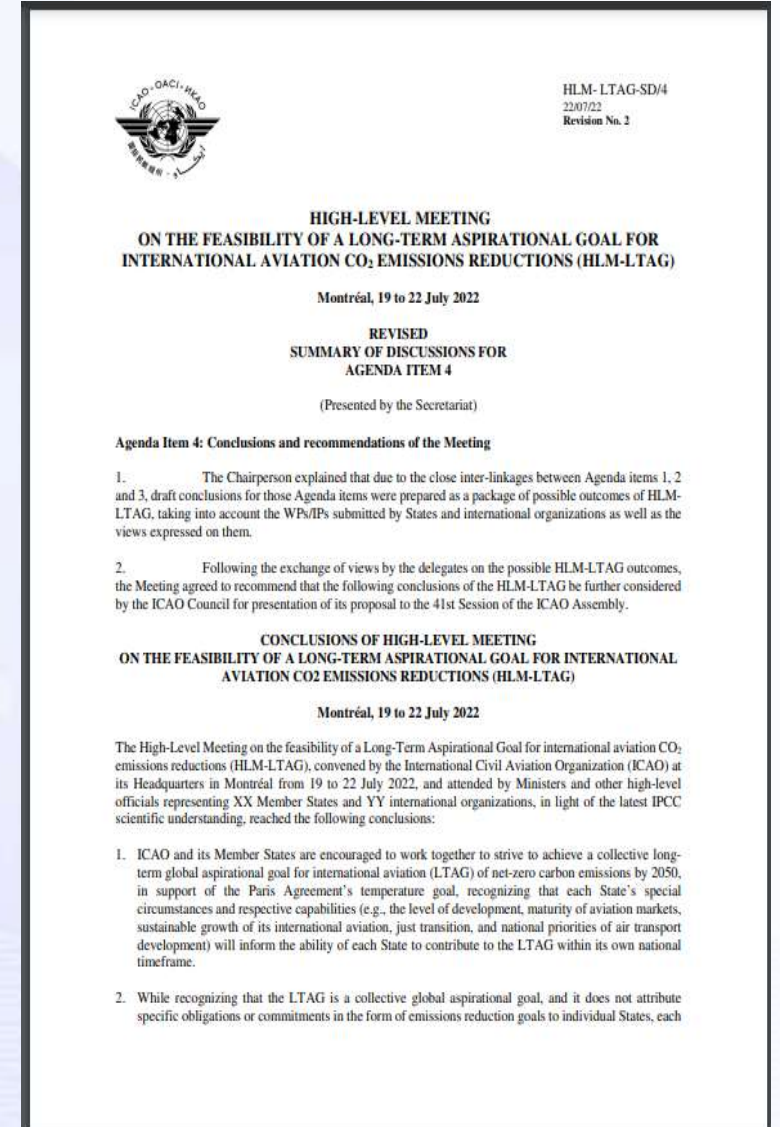


aac

الإتحاد العربي للنقل الجوي
arab air carriers' organization

IATA

Aviation Long-Term Aspirational Goal



Aviation Long-Term Aspirational Goal

To achieve a collective long-term aspirational goal for international aviation (LTAG) **of net zero carbon emissions by 2050.**

To work on the basket of measures namely: innovative technologies, new types of operations, and SAF, LCAF and other cleaner energy sources

Common But Differentiated Responsibilities

Non-discrimination and equal and fair opportunities

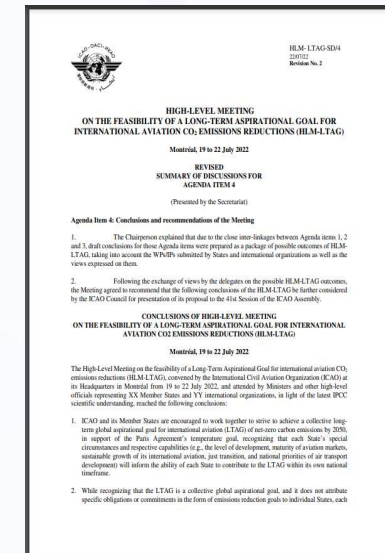
The establishment of a climate finance initiative or funding mechanism

Special circumstances and respective capabilities (SCRC)

No specific obligations or commitments in the form of emissions reduction goals to individual states

Capacity building and training

State Action Plans to include LTAG reductions



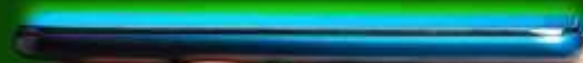
**NET
ZERO**



Loading...



2050





تبلغ مساهمتها في التخفيض
الصافي في الانبعاثات بين 25% و
30%

Contributes between 25%
& 30% to net reduction in
emissions

يحتاج الى استثمارات كبيرة
ولمساندة البحث والتطوير

Demands considerable
investments & government
funding for R&D



20%

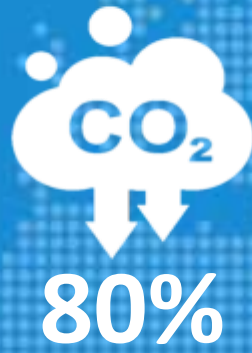


H₂

A blue circular icon containing the chemical formula H₂, representing hydrogen.



© AIRBUS 2021 - All rights reserved - R15





الحل هو الوقود المستدام
بشئى أنواعه، بما في ذلك
الوقود المنخفض الكربون

**SAF of all types,
including LCAF are
the only option**



تحتاج الصناعة الى دعم الحكومات واستثمارها، والا سيكون استخدام الوقود المستدام مرتفع التكاليف

The industry needs governments' assistance & support, otherwise the usage of SAF will be so expensive

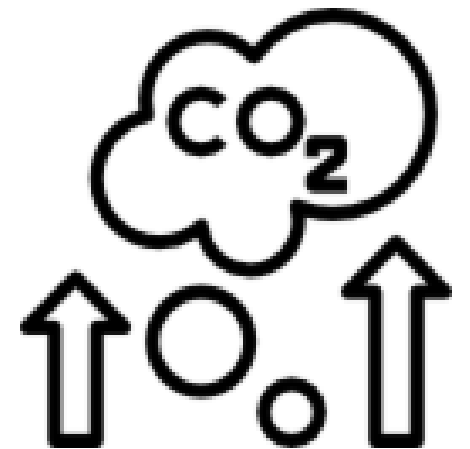




تزيد من الاتبعات
بنسبة

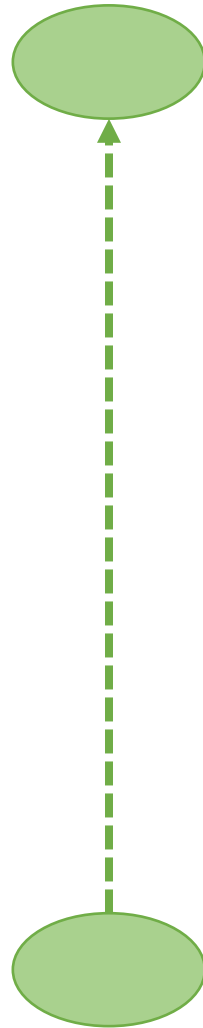
**Raises emissions
by at least**

6 %



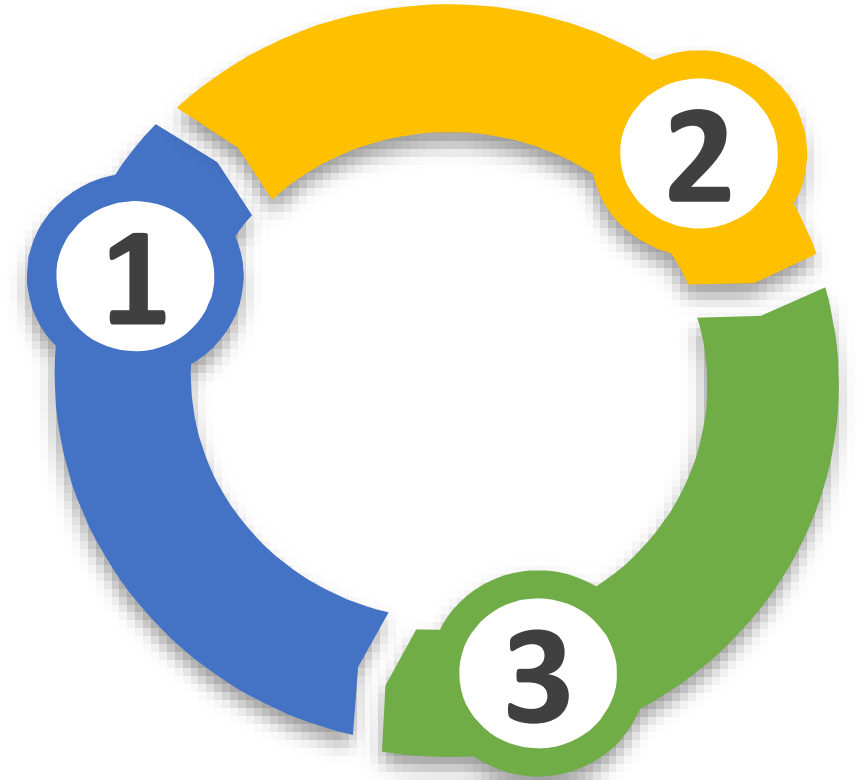


هدف صفر انبعاثات Net Zero Emissions



تقنيات المحركات والطائرات،
الوقود المستدام، والبنية التحتية

أملنا ان تكون العناصر الثلاثة الأولى
هي الحل



Engine & Aircraft Technologies,
SAF and Airport and Airspace
Infrastructure

Our hope that the first three
contributors to be the
solution

SAF/LCAF Technology Infrastructure

ستتضطر شركات الطيران الى شراء شهادات كربون لملء
الثغرة

Airlines will need to buy carbon offsetting
certificates to close the gap

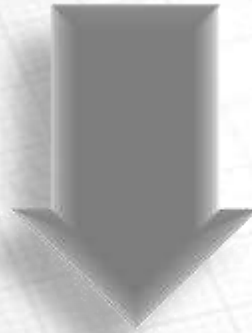
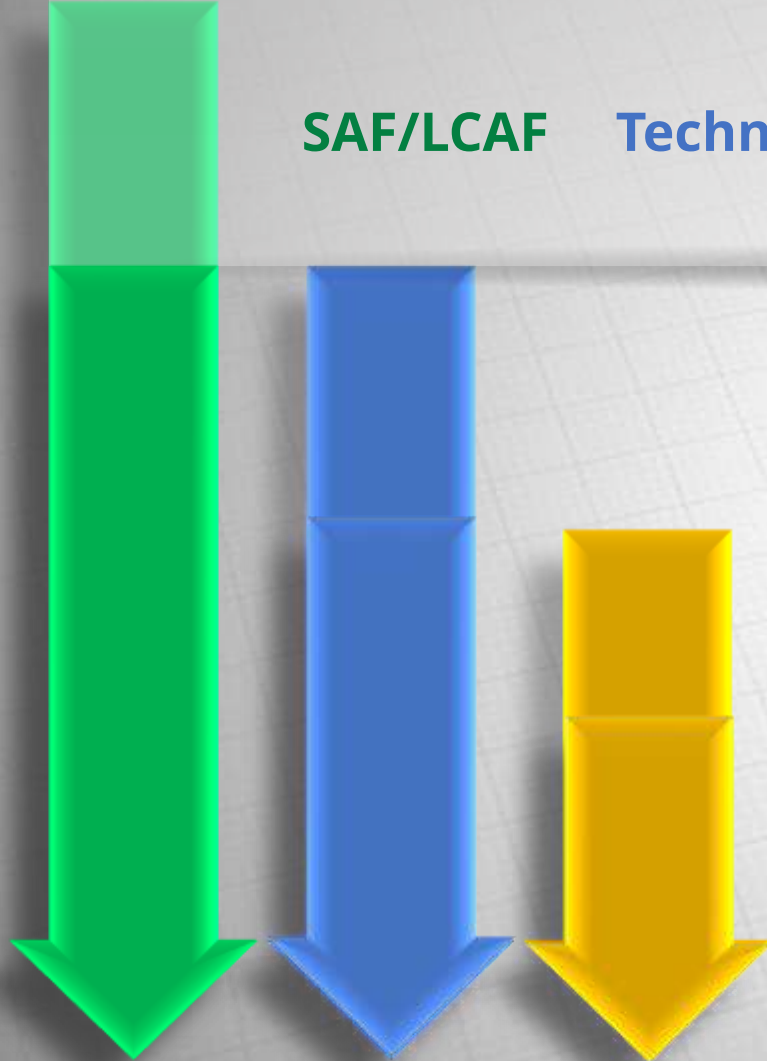


SAF/LCAF

Technology

Infrastructure

Emissions



ان خيار شراء شهادات كربون لن يتم اللجوء اليه الا في
حال التقصير في مساهمة الأطراف الاخرى

Buying carbon offsetting certificates will not
be resorted to unless the other contributors
failed to meet their obligations

شركات الطيران
Airlines

تعمل للوصول الى هذا الهدف وتحمل
أعباء مالية هائلة

Meet the goal while bearing
huge financial burdens

ستضغط على سوق السفر وتؤثر سلبا
على النمو الاقتصادي وفرص العمل

Will put pressure on the
travel market and negatively
affect the economic growth
and job opportunities



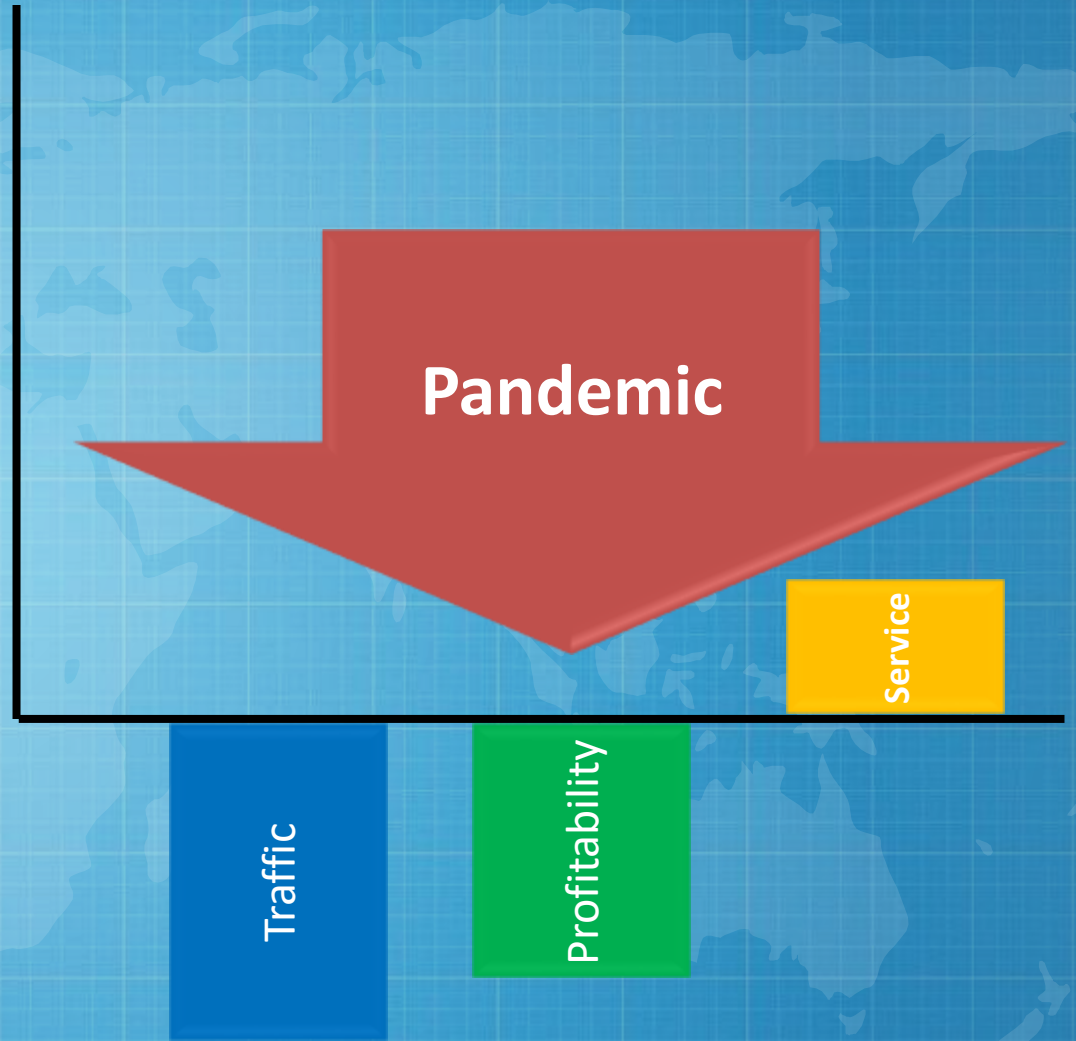
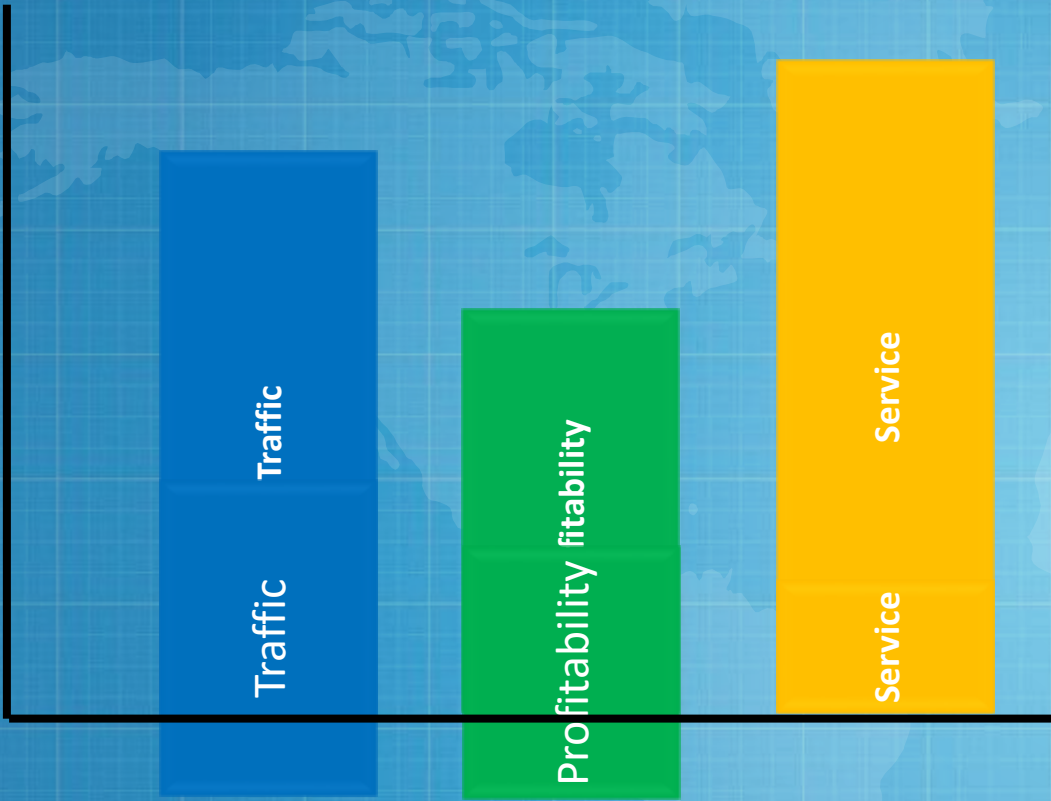
الحكومات
Governments

المصنعون
Manufacturers

موردو الوقود المستدام
SAF Suppliers

بكل ما يمكن شركات الطيران من
الوصول الى هدف 2050 باقل تكلفة
ممكنة

Do what is necessary to
enable airlines meet the
2050 goal at lowest possible
cost



The loser in both cases



Economic Growth & Jobs

Short-term goal



المستوى القصير المدى

		PILOT PHASE			FIRST PHASE			SECOND PHASE								
2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
<p>MONITORING, REPORTING & VERIFICATION TO SET THE BASELINE</p> <p>(and then annually up till the end of the scheme)</p>		<p>VOLUNTARY</p> <p><i>States are volunteering to be part of the scheme from 2021</i></p> <p>Operators flying routes between volunteering States will offset emissions based on:</p> <p>CO2 growth above 2019 levels</p>						<p>MANDATORY</p> <p><i>With exemptions for: small islands, least developed countries, land-locked developing countries, and states which have less than 0.5% of air traffic (although they can still volunteer)</i></p> <p>Operators flying routes between volunteering States will offset emissions based on</p> <p>CO2 growth above 85% of 2019 levels</p>								
		CO2 growth above 2019 levels			CO2 growth above 85% of 2019 levels			CO2 growth above 85% of 2019 levels			CO2 growth above 85% of 2019 levels		CO2 growth above 85% of 2019 levels			

OVER 80% OF THE GROWTH IN AIR TRAFFIC CO2 AFTER 2020 WILL BE OFFSET

Short-term goal



المستوى القصير المدى

		PILOT PHASE			FIRST PHASE			SECOND PHASE								
2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
MONITORING, REPORTING & VERIFICATION TO SET THE BASELINE (and then annually up till the end of the scheme)		100% Collective			100% Collective			100% Collective			20% Individual			70% Individual		
											100% Collective					
OVER 80% OF THE GROWTH IN AIR TRAFFIC CO2 AFTER 2020 WILL BE OFFSET																

Short-term goal

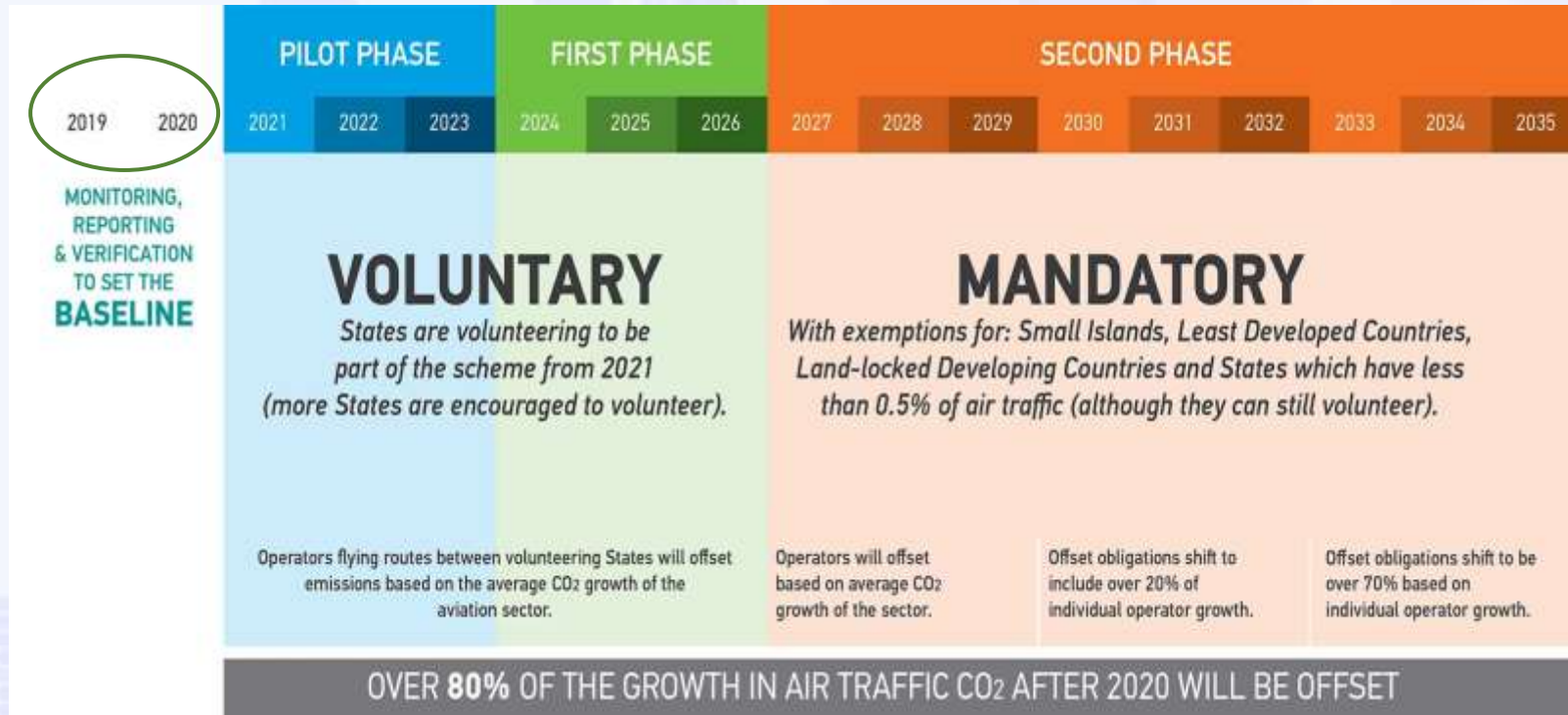


المستوى القصير المدى

		PILOT PHASE			FIRST PHASE			SECOND PHASE								
2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
MONITORING, REPORTING & VERIFICATION TO SET THE BASELINE (and then annually up till the end of the scheme)		100% Collective			100% Collective			100% Collective			100% Collective			15% Individual 70% Individual 80% Collective		
OVER 80% OF THE GROWTH IN AIR TRAFFIC CO2 AFTER 2020 WILL BE OFFSET																

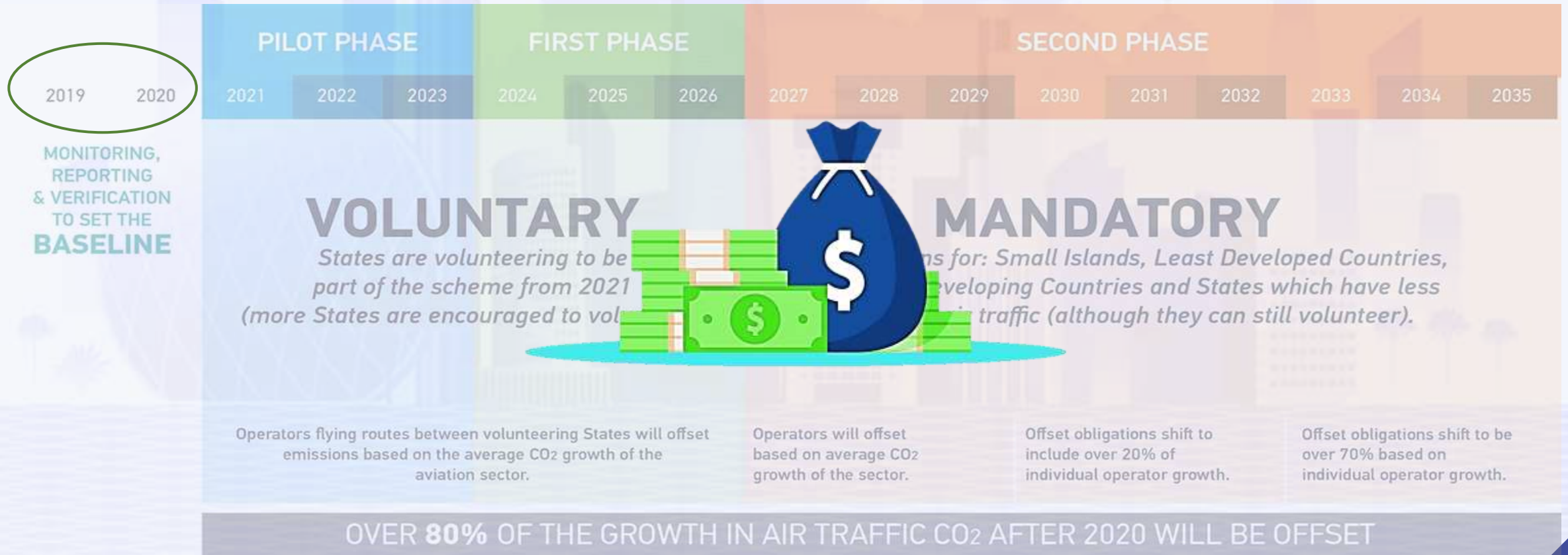
أملنا الرئيسي كان اعتماد مستوى انبعاثات عام 2019

Our hope was the adoption of emissions of 2019 only as the baseline



انخفاض التشغيل بحوالي 80 % بسبب جائحة كورونا

The decline in operations due to the onset of the pandemic



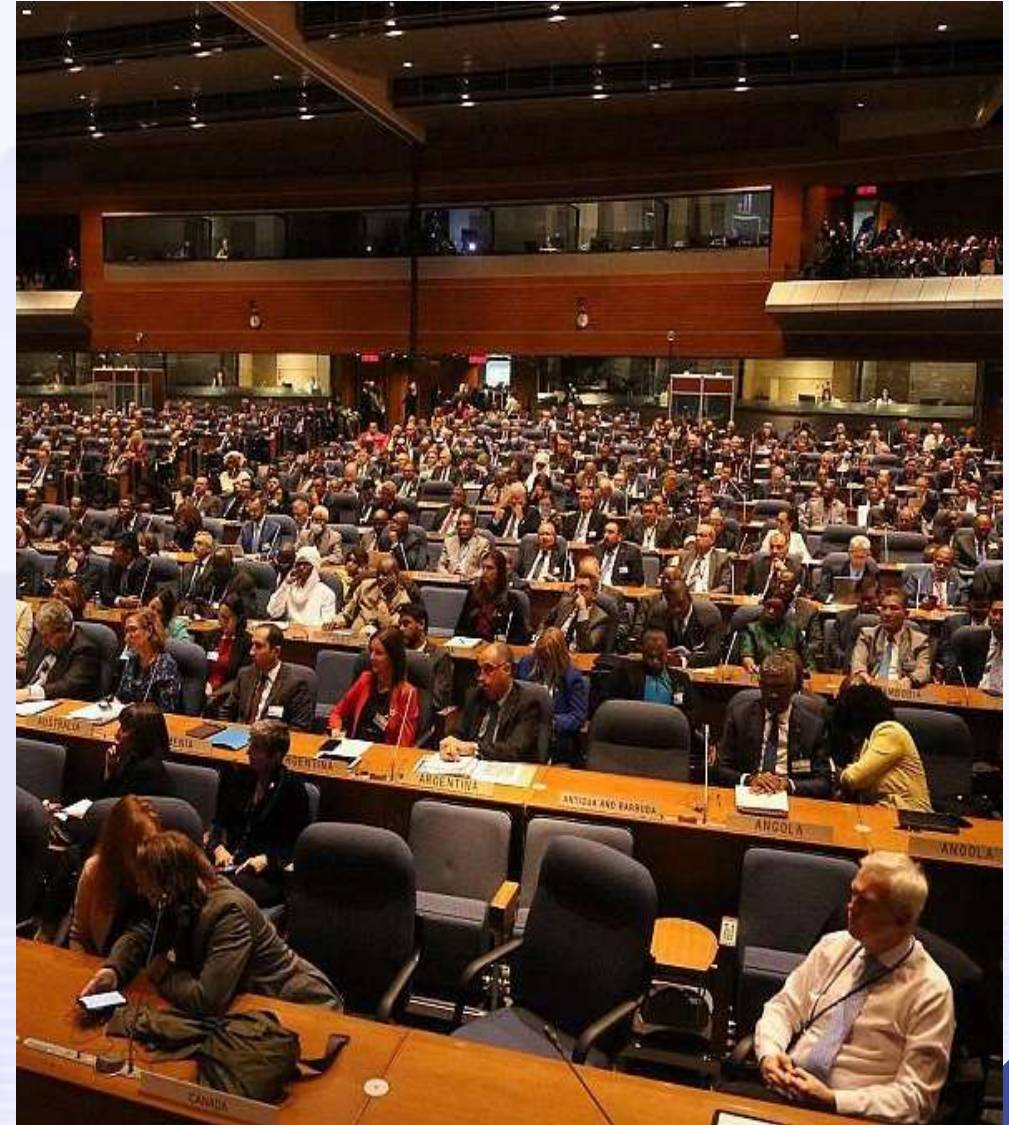
Short-term goal

المستوى القصير المدى

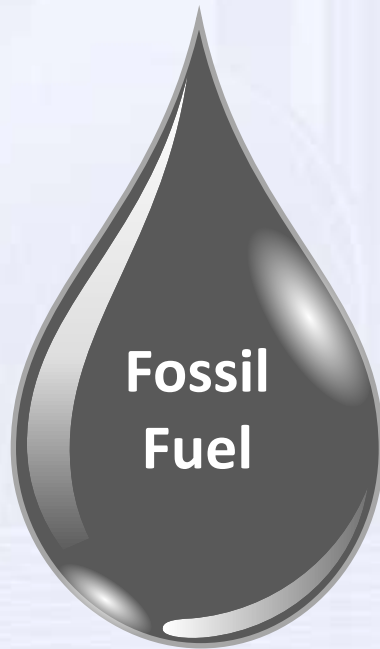


على الرغم من ان القرار يزيد من أعباء الشركات المعنية بكورسيا،
الا انه افضل بكثير من عدم الاتفاق

Despite additional costs for CORSIA airlines, the decision is much preferable to no agreement.



Proper Sustainable Aviation Fuels Regulations



Proper Sustainable Aviation Fuels Regulations



قيام الحكومات بتحفيز شركات الطيران على استخدامه من خلال منحها إعفاءات من ضرائب ورسوم تساهم بتخفيض تكاليف شرائه

Governments to incentivize airlines to use SAF by removing associated taxes and fees, hence lowering its price.

Proper Sustainable Aviation Fuels Regulations

وضع معايير قياسية له تضمن احتساب استخدامه لشركات الطيران في جميع الأحوال

Governments must agree on international standards to account for all airline certifications

Proper Sustainable Aviation Fuels Regulations

منح شركات الطيران حق الشراء والاحتساب او ما يسمّى بـ "Book & Claim"
دون أي قيود جغرافية

Allowing airlines to use Book & Claim without any geographical
restrictions

Proper Sustainable Aviation Fuels Regulations

توحيد معايير الاستدامة الواجب استيفاؤها لاعتماد وقود الطيران المستدام كوقود مؤهل للاستخدام، وإذا تعذر توحيد المعايير، الاعتراف بشهادات الاستدامة الممنوحة من قبل الجميع

The harmonization of sustainability criteria to accredit and certify SAF as eligible aviation fuels, and if not achievable, all stakeholders' sustainability certificates must be recognized









aac

الإتحاد العربي للنقل الجوي
arab air carriers' organization









Chairman
Mr. Mohamad A. El-Hout



Mr. Tony Douglas



H.E. Eng. Ibrahim
Abdul Rahman Al Omar



H.E. Mr. Akbar
Al Baker



Capt. Amr
Abuelenein



Mr. Abdelhamid
Addou



Mr. Bander
Almohanna



Mr. Khaled Chelly



Eng. Samer
Majali

Chief Executive Officers

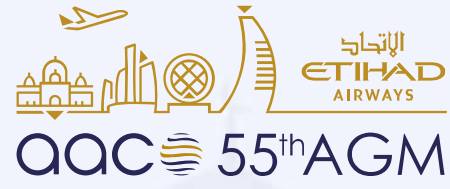
الرؤساء التنفيذيين



Representatives of Steering Boards & Task Forces

أعضاء المجالس التوجيهية وفرق العمل





الإتجاه ETIHAD



A Warm Appreciation to our Sponsors

PLATINUM



GOLD



SILVER



BRONZE



IAG INTERNATIONAL
AIRLINES
GROUP

malaysia 
airlines

FlyArna 


PEGASUS
AIRLINES



**TURKISH
AIRLINES**

Industry Partners

شركائنا في الصناعة

accelya
FURTHER FASTER

AIRBUS



ALTON
AVIATION CONSULTANCY

amadeus

ARABIAN
AEROSPACE



ATR

AVIATION

BIOADVISORY
A BIO-ADVISORY SERVICES COMPANY

Bloomberg

BOC AVIATION



CAPA
CENTRE FOR AVIATION



CIRIUM

Collins
Aerospace

EMBRAER

elfc

FLIGHT
SAFETY
FOUNDATION

FLYR



HERMES
AIR TRANSPORT ORGANISATION

Hitit

ishka
Aviation. Acumen. Altitude.

JEPPESEN
A JACOBS COMPANY

KENYON
EMERGENCY SERVICES

Lufthansa
Consulting

Lufthansa Systems

MedAire
An International SOS Company

MHIRJ

minsait
An Indra company

nourish

Optiontown
Enjoy unique options™

OMS
AERO GROUP

GO BEYOND

ProDIGIQ



Sabre

Sanad
A Mubadala Company

Shell Aviation

SITA

SmartKargo

THALES

travelX

wtw

نعتز دائماً
بخدمتكم

We are
always proud
to serve you



وشكراً
THANK YOU

