



HERMES

AIR TRANSPORT ORGANISATION

THE MAGAZINE

20

OCTOBER-DECEMBER 2023

**SALVATORE
SCIACCHITANO**

President of the
Council, ICAO



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Dr Kostas Iatrou
Director General,
Hermes - Air Transport Organisation



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EDITORIAL



Dr Kostas Iatrou

Director General

Hermes - Air Transport Organisation

Dear Hermes member,

Hermes hosted in June, thanks to the valuable and generous support of A4A, its by now established reception on the first day of IATA AGM. During the reception we presented a commemorative book for the 10th anniversary of Hermes. Hermes organised in June the 2023 the Hermes AGM and Leaders Forum hosted by Pegasus Airlines in Istanbul. In the assembly of the Forum Mehmet T. Nane was unanimously elected Board Member.

At the ACI World/Europe Assembly Mrs Gittens, President of Hermes, and myself had the opportunity to meet with the President of ICAO Council, Mr Salvatore Sciacchitano. In August, in my capacity as Director General of Hermes, had the pleasure to welcome in Athens the Director General of CANSO, and Hermes member, Simon Hocquard. Extending our cooperation with international organisations Hermes signed in September a Memorandum of Understanding with the Airport Services Association - ASA. Finally, I had the honour to represent Hermes at the ECAC/EU Dialogue and at the 56th AACO Annual General Meeting. All these events witness to the increasing recognition of Hermes Organisation as an important stakeholder of the air industry. In this issue we have the pleasure and honour to host an interview with the President of ICAO Council, Mr Salvatore Sciacchitano.

Kostas Iatrou

Enjoy reading!

1/06/2023

ICAO AND WORLD FOOD PROGRAMME TO ENHANCE SUPPORT FOR HUMANITARIAN AIR SERVICES



ICAO and the United Nations World Food Programme (WFP) entered a new landmark collaboration agreement today aimed at advancing civil aviation safety, efficiency, and sustainability in humanitarian operations. This strategic partnership, forged under the auspices of the ICAO

Global Implementation Support Symposium currently taking place in Seoul, Republic of Korea, will focus on key areas of cooperation to ensure safer and more sustainable aviation operations, particularly in the context of humanitarian air services.

01/06/2023

ICAO LIAISON OFFICER FOR PACIFIC SMALL ISLAND DEVELOPING STATES TO BE BASED IN FIJI



A significant milestone in ICAO's commitment to enhance support for the Pacific Small Island Developing States (PSIDS) has been reached, with the Government of Fiji and ICAO agreeing to the establishment of an ICAO Liaison Office for PSIDS in Nadi, Fiji. The agreement was signed by

Fiji's Deputy Prime Minister and Minister for Tourism and Civil Aviation, the Hon. Viliame Gavoka (pictured centre right), and the Secretary General of ICAO, Juan Carlos Salazar (pictured centre left), at the ICAO Global Implementation Support Symposium, which is currently taking place in Seoul.

08/06/2023

INTERNATIONAL AVIATION FEDERATIONS ITF AND IFALPA ACHIEVE MAJOR PROGRESS ON WORKERS' RIGHTS AT ILO

The International Transport Workers' Federation (ITF) and the International Federation of Air Line Pilots' Associations (IFALPA) have secured significant steps forward in the goal to advancing labour standards at a tripartite meeting at the International Labour Organization (ILO) in Geneva, Switzerland. The conclusions of the April meeting, which recommend measures to progress labour standards, will be formally adopted when approved by the ILO's Governing Body later this year.

11/06/2023

EUROCONTROL: IGA ISTANBUL AIRPORT SETS NEW NETWORK RECORD

Sunday 11 June 2023 saw a new airport network record set, as iGA Istanbul Airport handled 1,684 arrivals/departures, beating by 60 flights the previous busiest-ever European airport record of 1,624 daily flights set by Frankfurt Airport on 11 September 2019.

19/06/2023

INDIA'S INDIGO PLACES RECORD ORDER FOR 500 A320 FAMILY AIRCRAFT

IndiGo, India's largest airline by market share, has placed a firm order for 500 A320 Family aircraft, setting the record for the biggest single purchase agreement in the history of commercial aviation. The latest agreement takes the total number of Airbus aircraft on order by IndiGo to 1,330, establishing its position as the world's biggest A320 Family customer. The historic purchase agreement was signed by Rahul Bhatia, Promoter & Managing Director of IndiGo, Dr. Venkataramani Sumantran, Chairman and Non-Executive Independent Director of IndiGo, Pieter Elbers, CEO of IndiGo, Guillaume Faury, Airbus CEO, and Christian Scherer, Airbus Chief Commercial Officer and Head of International, at the Paris Air Show 2023.

Source: Airbus



14/06/2023

FIRST SUSTAINABLE AVIATION FUEL BATCHES CERTIFIED UNDER CORSIA

For the first time, sustainable aviation fuels (SAF) have been certified under the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA). Making use of the two ICAO-approved Sustainability Certification Schemes designed for this purpose, the development marks a significant milestone for both SAF production and aviation climate action by States.

The nine batches, totalling 1,542 tonnes, were certified by ISCC and RSB and produced in China, the Netherlands, and the United States, by ECOCHEM, Neste, and WorldEnergy, respectively.

They were produced from wastes and are characterized by 75% to 84% lower CO₂ emissions compared to conventional aviation fuel.



Source: icao.int

21/06/2023

AIRBUS UNVEILS FIRST IMMERSIVE REMOTE COLLABORATION CONCEPT TO EASE AIRCRAFT CABIN DEFINITION

Airbus is taking digital collaboration into a new dimension by developing an industry-first collaborative solution based on mixed reality technologies for aircraft interior customisation.

This new concept will transform and boost the way Airbus defines aircraft cabins by enabling live and remote interactions with customers in an immersive virtual world.

Thanks to holograms in a 3D environment, users can visualise various cabin equipment choices and test different interior configurations, materials or colours. All users, wherever they are, can communicate easily and in real time.



22/06/2023

ICAO COUNCIL CONDEMNS DPRK MISSILE LAUNCHES

The ICAO Council has condemned recent missile launches by the Democratic People's Republic of Korea (DPRK), noting that they "pose a serious risk to international civil aviation", and "a complete disregard of the relevant United Nations Security Council Resolutions."

The decision was arrived at earlier this week during the Council's 229th Session, subsequent to a report on the topic presented by ICAO Secretary General Juan Carlos Salazar, and an update from ICAO Council President Salvatore Sciacchitano.

29/06/2023

ACI WORLD, ACI NORTH AMERICA AND TSA SIGN MOU TO ADVANCE THE DEVELOPMENT OF AVIATION SECURITY

Airports Council International (ACI) World, ACI North America (NA) and the U.S. Transportation Security Administration (TSA) have signed a Memorandum of Understanding (MoU) to further enhance the development of secure and efficient aviation security operations globally.

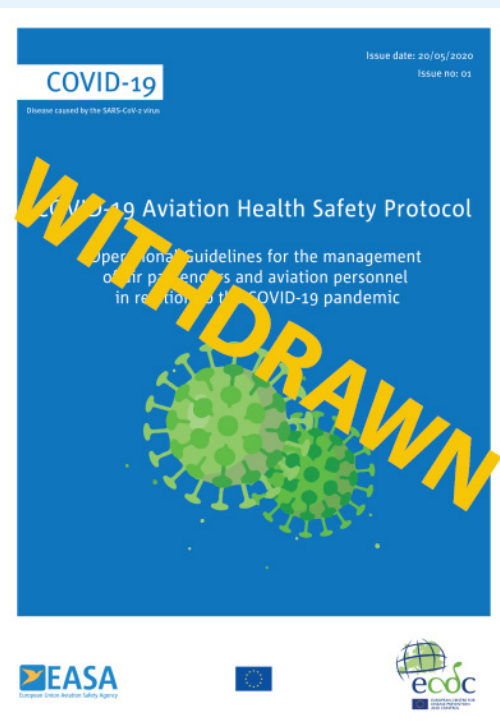
The MoU seeks to formalize multiple workstreams and ensure the continued collaboration on and promotion of global aviation security projects of common interest for the benefit of travellers worldwide.

29/06/2023

EASA AND ECDC FORMALLY RETIRE COVID-19 AVIATION HEALTH SAFETY PROTOCOL

The European Union Aviation Safety Agency (EASA) and the European Centre for Disease Prevention and Control (ECDC) have decided to formally retire the EASA-ECDC joint Aviation Health Safety Protocol (AHSP), while acknowledging its significant value during the high SARS-CoV-2 circulation periods during the pandemic.

This decision is taken in the light of the decreasing or stable trends observed in the European Union/European Economic Area (EU/EEA) indicators based on pooled country data in all age groups as described by the European Centre for Disease Prevention and Control (ECDC) since March 2023 and the WHO statement of May 5, 2023 declaring that “COVID-19 is now an established and ongoing health issue which no longer constitutes a public health emergency of international concern (PHEIC)”.



29/06/2023

AIRPORTS PRIORITIZE CLEANER ENERGY TRANSITION AND CYBER THREATS: KEY RESOLUTIONS AGREED AT ACI WORLD ANNUAL GENERAL ASSEMBLY

The Airports Council International (ACI) World Annual General Assembly (WAGA) agrees key resolutions on cleaner energy transition and on cyber threats, reflecting the priorities for airports in building a sustainable and resilient aviation ecosystem.

Promoting SAF and supporting ESG practices

Recognizing the need for collective action to deliver the long-term goal of net-zero CO₂ emissions by 2050, the Resolution “Leading through cleaner energy transition and robust ESG practices,” calls on the International Civil Aviation Organization (ICAO) and governments to work with all financial institutions to facilitate access to green finance for aviation and to stimulate Sustainable Aviation Fuel (SAF) development. It urges governments to provide the necessary technical and economic support and required regulatory framework for supporting the airport sector energy transition. Airports are called upon to consider adopting robust Environmental, Social and Governance (ESG) practices according to their specific circumstances, engage with ACI in developing the Airport ESG Global Framework, and participate in global efforts to accelerate the deployment of SAF.

Cyber threats in aviation

Recognizing that the aviation industry relies on interconnected systems and advanced technologies and that they may be vulnerable to increasing cyber threats, the Resolution “Affirming airport’s commitment to addressing the evolving cyber threats in aviation,” recognizes the actions already taken by airports and calls on all aviation stakeholders to strengthen their awareness and mitigation measures in this area. The Resolution urges governments, international organizations, and relevant stakeholders to leverage the existing international standards and frameworks on information security and cybersecurity in the development of aviation cybersecurity frameworks, standards, and guidelines. It also calls on governments to implement the necessary measures to support the development of a skilled aviation cybersecurity workforce.

29/06/2023

VIRGIN GALACTIC COMPLETES INAUGURAL COMMERCIAL SPACEFLIGHT

Second successful spaceflight in two months ‘Galactic 01’ spaceflight carried 13 research payloads and three crew members from the Italian Air Force and the National Research Council of Italy.



Source: Virgin Galactic

10/07/2023

GLOBAL AVIATION SUMMIT CALLS FOR URGENCY ON GENDER EQUALITY

The ICAO Global Aviation Gender Summit in Madrid resulted in a “Call to Action” that comprises several clear and actionable steps and strategies towards resolving the aviation sector’s very significant gender equality challenges. The Call to Action was presented by the President of the ICAO Council, Salvatore Sciaccchitano.

“Advancing gender equality in aviation is not only the right thing to do, but a necessary transformation for the future of our sector,” remarked Council President Sciaccchitano. “The Call to Action this event has resulted in accordingly conveys a strong message of determination and urgency, and outlines an array of strategic action points.”

Source: ICAO



10/07/2023

AIRBUS INAUGURATES NEW TOULOUSE A320 FAMILY FINAL ASSEMBLY LINE

Airbus has inaugurated its new A320 Family final assembly line (FAL) in Toulouse during a ceremony attended by French Minister of Economy & Finance Bruno Le Maire, French Transport Minister Clément Beaune, Minister of State for Industry Roland Lescure, and Minister of State for Territorial Collectivities and Rural Affairs Dominique Faure, as well as hundreds of Airbus employees.



Source: Airbus

► *cont'd*

10/07/2023

FAA INVESTS NEARLY \$92 MILLION TO HELP AIRPORTS REACH PRESIDENT'S GOAL OF NET ZERO-EMISSIONS BY 2050

Airports across the country are more sustainable thanks to funding from the Federal Aviation Administration. As part of nearly \$268 million in grants, about \$92 million will go to 21 airports for solar panels, electric buses, charging stations and electri-

fication studies; investments that support good-paying jobs and their local communities. Also, as a part of this sustainability effort, the agency is providing funding to help general aviation airports safely transition to unleaded fuel for piston-engine aircraft.

18/07/2023

PROGRESS TOWARDS IMPLEMENTING CLEANER ENERGIES FOR GLOBAL AVIATION

Crucially important consultations on the development, financing, and deployment of cleaner energies for aviation, have concluded at ICAO's Montreal Headquarters. The "2023 ICAO Stocktaking on Aviation in-Sector CO₂ Emissions Reductions and Pre-CAAF/3 Policy and Finance Consultation" event tracked progress towards the achievement of aviation's long-term global aspirational goal (LTAG) of net-zero carbon emissions by 2050 and set the stage for States' policy recommendations at the Third ICAO Conference on Aviation and Alternative Fuels (CAAF/3), which will take place in November in Dubai, United Arab Emirates.



Source: ICAO

25/07/2023

U.S. AIRLINES TO SUPPORT NASA-BOEING SUSTAINABLE FLIGHT DEMONSTRATOR PROJECT

Boeing [NYSE: BA] and NASA will collaborate with U.S. airlines to advise the Sustainable Flight Demonstrator (SFD) project and development of the X-66A research aircraft. As part of a new sustainability coalition, Alaska Airlines, American Airlines, Delta Air Lines, Southwest Airlines and United Airlines will provide input on operational efficiencies, maintenance, handling characteristics and airport compatibility. NASA and Boeing also unveiled the new X-66A livery at EAA AirVenture Oshkosh.



Source: Boeing

19/07/2023

ACI WORLD CONFIRMS TOP 20 BUSIEST AIRPORTS WORLDWIDE

Airports Council International (ACI) World has today published the latest World Airport Traffic Dataset, confirming the top 20 busiest airports in the world and revealing airport passenger, cargo, and aircraft movement rankings for over 2,600 airports across more than 180 countries and territories.

The dataset's key findings confirm total global passenger traffic for 2022—surpassing 6.6 billion—the return of international traffic, and the prevalence of U.S. airports in the top rankings.

Passengers*					
2022	2021	AIRPORT	2022	2021	Percent change
1	1	ATLANTA GA, US (ATL)	93 699 630	75 704 760	23.8
2	2	DALLAS/FORT WORTH TX, US (DFW)	73 362 946	62 465 756	17.5
3	3	DENVER CO, US (DEN)	69 286 461	58 828 552	17.8
4	4	CHICAGO IL, US (ORD)	68 340 619	54 024 784	26.5
5	27	DUBAI, AE (DXB)	66 069 981	29 110 609	127.0
6	5	LOS ANGELES CA, US (LAX)	65 924 298	48 009 241	37.3
7	14	ISTANBUL, TR (IST)	64 289 107	36 988 067	73.8
8	54	LONDON, GB (LHR)	61 614 230	19 395 287	217.7
9	13	NEW DELHI, IN (DEL)	59 490 074	37 139 957	60.2
10	31	PARIS, FR (CDG)	57 474 033	26 196 575	119.4
11	25	NEW YORK NY, US (JFK)	55 287 711	30 788 322	79.6
12	10	LAS VEGAS NV, US (LAS)	52 694 312	39 754 366	32.6
13	34	AMSTERDAM, NL (AMS)	52 472 188	25 492 633	105.8
14	12	MIAMI FL, US (MIA)	50 684 396	37 302 456	35.9
15	42	MADRID, ES (MAD)	50 602 864	24 121 350	109.8
16	32	TOKYO, JP (HND)	50 334 354	26 169 812	92.3
17	7	ORLANDO FL, US (MCO)	50 178 499	40 351 068	24.4
18	39	FRANKFURT, DE (FRA)	48 918 482	24 812 849	97.2
19	6	CHARLOTTE NC, US (CLT)	47 758 605	43 302 230	10.3
20	17	MEXICO CITY, MX (MEX)	46 258 521	36 056 614	28.3

* Total passengers enplaned and deplaned, passengers in transit counted once

31/07/2023

BOOSTING STATES' AERODROME CERTIFICATION CAPACITY

A new agreement between ICAO and Airports Council International (ACI) will enhance support for Governments' certification of aerodromes to international standards.

The agreement, which launched the Aerodrome Certification Implementation Package (iPack) of materials for regulators and airport operators, was signed in Montréal by ICAO Secretary General Juan Carlos Salazar and the Director General of ACI World Luis Felipe de Oliveira.



Source: ICAO

02/08/2023

WIZZ AIR ORDERS A FURTHER 75 A321NEO FAMILY AIRCRAFT

Wizz Air, the fastest growing European ultra-low-cost airline, has signed a firm contract for an additional 75 A321neo Family aircraft, taking its total order for the largest member of the Airbus single aisle to 434, and for Wizz's A320 Family overall to 565 aircraft.

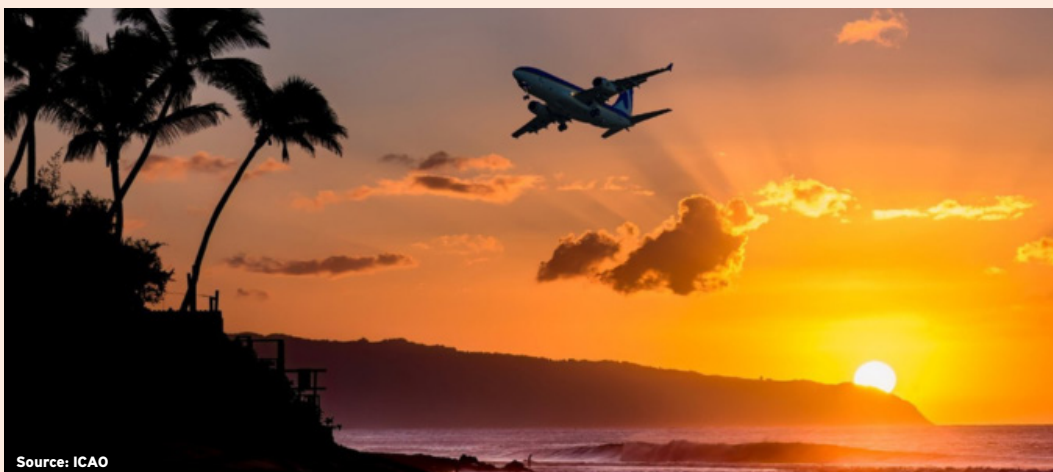
Source: Airbus



02/08/2023

NEW ICAO PACIFIC ISLANDS LIAISON OFFICER ESTABLISHED

ICAO has taken a major step to improve its engagement and support for Pacific Small Island Developing States (PSIDS) with the appointment of a new Liaison Officer. The new position responds to the Ministerial Port Moresby Declaration on Aviation Safety and Security of 2021, the Pacific Regional Aviation Strategy (2022 – 2032) adopted by countries at the UN agency's 41st Assembly last October, and has been realized in collaboration with the Pacific Aviation Safety Office (PASO) and essential financial support from the government of Singapore.



Source: ICAO

04/08/2023

UNITED STATES, MONGOLIA SIGN OPEN-SKIES AGREEMENT AND TRANSPORTATION MEMORANDUM

In connection with the official state visit between Vice President Kamala Harris and Prime Minister Oyun-Erdene Luvsannamsrai, U.S. Transportation Secretary Pete Buttigieg and Mongolia Road and Transport Development Minister Byambatsogt Sandag signed the U.S.-Mongolia Open Skies Agreement. The Agreement will facilitate greater air connectivity between the United States and Mongolia and will provide the legal framework for nonstop passenger flights.

The Agreement, which is now being applied by the two agencies, was finalized on January 24, 2023. It establishes new opportunities for airlines of both countries and will be an important economic driver for the bilateral relationship while expanding options for travelers and shippers, and encouraging closer people-to-people ties. DOT has already issued authority to MIAT Mongolian Airlines to serve the United States on the basis of the new Agreement. Mongolia is the 132nd U.S. Open-Skies partner.

10/08/2023

A NEW AIR INDIA IS UNVEILED, REPRESENTING BOLD NEW INDIA ON THE WORLD STAGE

Air India, a Tata Group-owned airline, today unveiled a modern new brand identity and new aircraft livery that capture the essence of a bold new India, marking a milestone in its Vihaan.AI transformation of the national institution into a national inspiration. The new look reimagines the iconic Indian window shape, historically used by Air India, into a gold window frame that becomes central to the new brand design system - symbolising a 'Window of Possibilities'. Air India's new logo symbol - 'The Vista' - is inspired by the peak of the gold window frame, signifying limitless possibilities, progressiveness, and the airline's bold, confident outlook for the future. Air India's brand-new aircraft livery and design features a palette of deep red, aubergine, and gold highlights, as well as a chakra-inspired pattern. It also boasts a striking new custom-made 'Air India Sans' font, marrying confidence with warmth to position Air India as premium, inclusive, and accessible.

AIR INDIA LIVERY OVERVIEW

AIR INDIA WORDMARK

Our bold wordmark reflects the renewed confidence and stature that Air India brings to the world. It is a hand-crafted asset which reflects world-class standards, while retaining an Indian flavour inspired by the shape of our hero signature window frame shape. The position is large in scale over the front half of the fuselage, purposeful and confident to be clearly legible at distance.

WINDOW FRAME WINGTIPS

On the inside of the wingtips, the tailfin design is replicated on a smaller scale for added personality and storytelling for passengers to enjoy. On the outside of the wingtip, a simple solid gold is used to convey premium cues and link to the hero gold frame.



HERO WINDOW FRAME TIP TAILFIN

The tailfin uses the tip of the window frame as a bold directional statement of progress. It is applied in premium metallic gold, and has shadows to give it depth and lift. The hero gold frame shape is supported by two dynamic supporting window frame shapes in Air India red and purple. The Jaali pattern detail is inspired by the chakra from the original logo.

GOLD FRAME UNDERBELLY

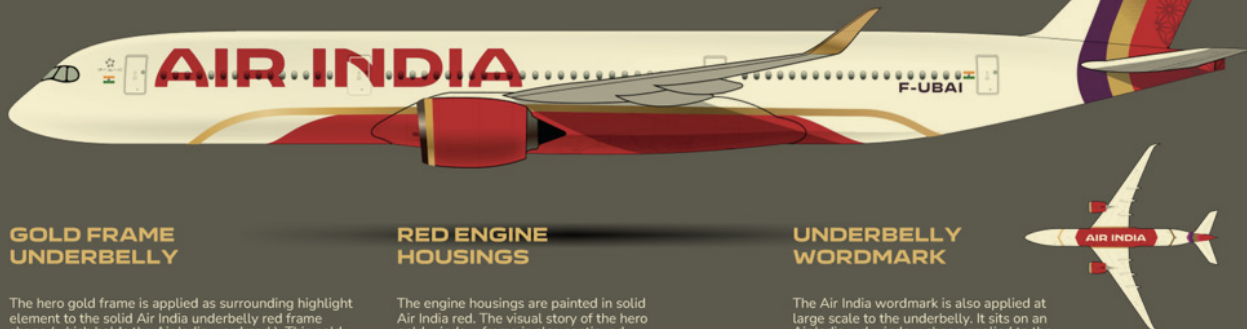
The hero gold frame is applied as surrounding highlight element to the solid Air India underbelly red frame shape (which holds the Air India wordmark). This gold frame detail adds storytelling and premium cues, while bringing extra attention to the underbelly wordmark.

RED ENGINE HOUSINGS

The engine housings are painted in solid Air India red. The visual story of the hero gold window frame is also continued with a simple gold band which is applied around the front of the engine housing.

UNDERBELLY WORDMARK

The Air India wordmark is also applied at large scale to the underbelly. It sits on an Air India red window shape applied to the underside of the fuselage to allow our aircraft to be recognised easily from below when flying at low altitude.



Source: Air India

24/08/2023

BOOM SUPERSONIC ADVANCES FLIGHT PREPARATIONS FOR XB-1

Boom Supersonic, the company building the world's fastest airliner, Overture, today announced it has completed several key milestones for XB-1, Boom's technology demonstrator aircraft. XB-1 leverages 60 years of progress in airplane technologies like carbon fiber composites, advanced avionics, and digitally-optimized aerodynamics to enable sustainable supersonic travel.



Source: Boom Supersonic

25/08/2023

AFRICAN STATES AGREE TO HEIGHTEN SAFE, SECURE AND SUSTAINABLE AIR CONNECTIVITY

The eighth edition of Africa-Indian Ocean (AFI) Aviation Week has resulted in the region's governments agreeing to work more closely together on the implementation of ICAO aviation safety, security and sustainability standards and plans, with "high performing" States offering greater assistance to those that require the most support.

Source: ICAO



31/08/2023

EASA PROPOSES RULES FOR VTOL OPERATIONS, INCLUDING AIR TAXIS

The European Union Aviation Safety Agency has proposed rules for safe operations of Vertical Take-Off and Landing aircraft (VTOL), which includes air taxis, paving the way for these innovative aircraft to take to the skies in Europe's cities.

Source: EASA



01/09/2023

LUC TYTGAT APPOINTED ACTING EXECUTIVE DIRECTOR OF EASA

Luc Tytgat has been appointed Acting Executive Director of the European Union Aviation Safety Agency (EASA) with effect from September 1, 2023. Tytgat replaces Patrick Ky, who is leaving the Agency at the expiry of his second 5-year mandate.

Tytgat joined EASA as Director of Strategy and Safety Management in January 2015 after having been responsible for air transport and space domains in the European Commission.

In his role at EASA he successfully increased the level of safety intelligence and developed a better and more agile regulatory framework. He set the strategic direction for key challenges faced by the sector, such as the need to reinforce the Agency's role in countering climate change and emerging safety risks such as cybersecurity, conflict zones and health. EASA's research and innovation as well as international cooperation activities also expanded significantly under his guidance.



Source: EASA

05/09/2023

UK HYDROGEN ALLIANCE ESTABLISHED TO ACCELERATE ZERO CARBON AVIATION AND BRING AN £34BN ANNUAL BENEFIT TO THE COUNTRY

A group of leading companies in the UK aviation and renewable energy sectors including easyJet, Rolls-Royce, Airbus, Orsted, GKN Aerospace and Bristol Airport, have today established the Hydrogen in Aviation (HIA) alliance to accelerate the delivery of zero carbon aviation. HIA will work to ensure the UK capitalises on the huge opportunity hydrogen presents to both the aviation industry and country as a whole. While there are various options for decarbonising the aviation sector, including sustainable aviation fuels (SAF), synthetic fuels or batteries, HIA believes that more attention should be paid to the potential of the direct use of hydrogen.



Source: Airbus

13/09/2023

EVALUATION CONFIRMS EUROPEAN UNION AVIATION SAFETY AGENCY (EASA) FIT FOR PURPOSE

A Commission evaluation of Regulation (EU) 2018/1139 on common rules in the field of civil aviation and establishing a European Union Aviation Safety Agency ('EASA') has given a positive appraisal of EASA's performance

and added value.

The evaluation assessed the Regulation's effectiveness in reaching its objectives, efficiency, relevance in responding to the stakeholder needs, coherence with other EU legislation and policy actions, and

its overall EU added value. The evaluation also reviewed EASA's performance in relation to its objectives, mandate, and tasks. The findings are analysed in an accompanying Staff Working Document.

14/09/2023

FEDERAL AVIATION ADMINISTRATION RETURNS MEXICO TO HIGHEST AVIATION SAFETY STATUS

The Federal Aviation Administration returned Mexico's aviation safety rating to the highest level following more than two years of close work between the civil aviation authorities in both countries.

With a return to Category 1 status, Mexico can add new service and routes to the U.S., and U.S. airlines can resume marketing and selling tickets with their names and designator codes on Mexican-operated flights.

14/09/2023

NEW RESPONSIBILITIES PLACE EASA AT CENTRE OF DRIVE TO DECARBONISE AVIATION

The European Union Aviation Safety Agency (EASA) is set to be assigned a raft of new responsibilities by European Union (EU) legislators that will further expand its environmental remit, charging the Agency with monitoring the aviation industry's progress toward carbon-neutrality by 2050 and with making the outcomes transparent for citizens.

The European Parliament voted in favour of the ReFuelEU Aviation, a comprehensive regulation in the context of the European Green Deal, on September 13, 2023. This approval follows a provisional agreement reached in April with the EU Council, which is now expected to adopt the final text.

19/09/2023

IATA ANNOUNCES FIRST SAFETY LEADERSHIP CHARTER SIGNATORIES

The International Air Transport Association (IATA) announced the launch of the IATA Safety Leadership Charter at the IATA World Safety and Operations Conference taking place in Hanoi, Vietnam. Safety leaders from more than 20 airlines are the first signatories:

Air Canada	Emirates Airline	Philippine Airlines
Air India	Ethiopian Airlines	Qantas Group
Air Serbia	EVA Airways	Qatar Airways
ANA	Garuda Indonesia Airlines	TAROM
British Airways	Hainan Airlines	United Airlines
Carpatair	Japan Airlines	Vietnam Airlines
Cathay Pacific	Pegasus Airlines	Xiamen Airlines
Delta Airlines		

The Safety Leadership Charter is aimed at strengthening organizational safety culture through commitment to eight key safety leadership guiding principles. It was developed in consultation with IATA members and the wider aviation community to support industry executives in evolving a positive safety culture within their organizations.



19/09/2023

FRANKFURT AIRPORT: ROHDE & SCHWARZ AND FRAPORT EVALUATE THE WORLD'S FIRST WALK-THROUGH SCANNER FOR PASSENGERS

Fraport began testing the world's first walk-through security scanner for passengers at Frankfurt Airport. The R&S QPS Walk2000 from Rohde & Schwarz is designed to speed up security checks. The first of these scanners is currently in use in Concourse A of Terminal 1. Passengers simply walk through the scanner at a normal pace without stopping. The test and evaluation phase is set to last up to six months and will provide Fraport and Rohde & Schwarz with important information to help optimize the system.



Source: Rohde & Schwarz

22/09/2023

EASA AND ECDC SIGN MOU FOR COORDINATION IN FUTURE PUBLIC HEALTH EMERGENCIES

The European Union Aviation Safety Agency (EASA) signed a Memorandum of Understanding (MoU) with its sister Agency, the European Centre for Disease Prevention and Control (ECDC), to pave the way for a faster and more effective response to future public health emergencies.

EASA and ECDC worked together during the COVID-19 pandemic to publish the Aviation Health Safety Protocol, which allowed air travel to resume with a reduced risk of transfer of infection under pandemic conditions. The agreement was requested by EASA Member States and the aviation industry to ensure that this effective partnership can be applied in any similar future scenario.



Source: EASA

25/09/2023

ROLLS-ROYCE HYDROGEN RESEARCH PROJECT SETS NEW WORLD INDUSTRY FIRST WITH KEY MILESTONE SUCCESS

Rolls-Royce (LSE: RR., ADR: RYCEY) today announces a further key milestone, a world industry first, has been achieved in its hydrogen research project.

Both Rolls-Royce and its partner easyJet are committed to being at the forefront of the development of hydrogen combustion engine technology capable of powering a range of aircraft, including those in the narrow-body market segment, from the mid-2030s onwards.

Now, working with Loughborough University in the UK and the German Aerospace Centre Deutsches Zentrum für Luft-und Raumfahrt (DLR), Rolls-Royce has proven a critical engine technology that marks another significant step in the journey to enabling hydrogen as an aviation fuel.

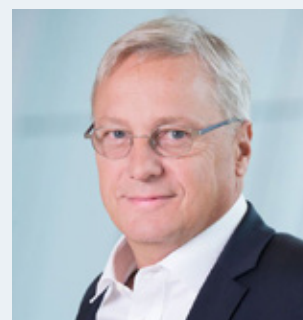


Source: Rolls-Royce

26/09/2023

AIRBUS NOMINATES NEW COMMERCIAL AIRCRAFT BUSINESS CEO

- Christian Scherer to become new Commercial Aircraft business CEO, reporting to Airbus CEO Guillaume Faury.
- Nomination will ensure dedicated operational focus for this business in challenging times, enabling the Airbus CEO to focus on the strategic, global and transformational agenda of Airbus.



Source: Airbus

29/09/2023

SINGLE EUROPEAN SKY: EUROPEAN COMMISSION ADVISED TO PRIORITISE ENVIRONMENTAL PERFORMANCE WHEN SETTING PERFORMANCE TARGETS FOR AIR NAVIGATION SERVICES

The European Commission has received the Performance Review Body's proposed EU-wide target ranges for the fourth reference period (RP4, 2025-2029) of the Single European Sky performance and charging scheme. The indicative targets will be put to stakeholders in a targeted consultation.

The target ranges aim to better incentivise the per-

formance of the monopoly air navigation service providers designated by the Member States. They also aim to ensure the highest safety standards, encourage more efficient flight paths to reduce environmental impact, and improve the punctuality of flights, as well as value for money for airlines and passengers.

30/09/2023

SAUDIA ENTERS A NEW ERA THROUGH MAJOR RE-BRAND STRATEGY

The rebrand marks the beginning of a new era for Saudia, introducing innovative concepts in terms of customer services with a strong focus on digital aspects and enhancing the guest experience by celebrating Saudi culture. This transformation reinforces Saudia's national identity as it reimagines all products and services to engage all five senses. Guests can anticipate an authentic Saudi experience during their journey, showcasing the very best of Saudi Arabia and its rich culture. This includes a distinctive fragrance and sonic identity, locally inspired cuisine, all crafted by skilled Saudi craftsmen. This new identity mirrors Saudi Arabia's welcoming spirit, leaving guests with a deep sense of the country's warmth and hospitality, while promoting a deeper appreciation of Saudi culture for both nationals and visitors. The rebrand also encompasses new uniforms for cabin crew and ground staff.



30/09/2023

PEGASUS TAKES DELIVERY OF ITS 100TH AIRCRAFT, CUMHURIYET

Continuing to expand its fleet with new generation engine aircraft, Pegasus Airlines has taken delivery of its 100th aircraft, named Cumhuriyet ('Republic') in honour of the 100th anniversary of the Republic of Türkiye. The new Airbus A321neo, bearing the tail sign TC-RDP, completed its inaugural journey from Hamburg, Germany, landing at Istanbul Sabiha Gökçen Airport on Saturday, 30 September 2023, at 6pm.



Source: Pegasus

03/10/2023**SAS REACHES MAJOR MILESTONE IN SAS FORWARD – ANNOUNCES THE WINNING CONSORTIUM, INCLUDING DETAILS OF THE TRANSACTION STRUCTURE**

SAS has reached a major milestone in its ongoing chapter 11 process in the U.S. and has selected Castlake, L.P., on behalf of certain funds or affiliates (“Castlake”), Air France-KLM S.A. (“Air France-KLM”) and Lind Invest ApS (“Lind Invest”), together with the Danish state (collectively, the “Investors”) as the winning bidder consortium in its exit financing solicitation process. The agreed transaction structure includes a total investment in the reorganized SAS corresponding to USD 1,175 million (SEK 12.925 billion[1]), including USD 475

million (SEK 5.225 billion) in new unlisted equity and USD 700 million (SEK 7.7 billion) in secured convertible debt, as well as a USD 500 million (SEK 5.5 billion) refinancing by Castlake of SAS’ current debtor-in-possession (“DIP”) term loan. As part of the transaction, SAS is intended to eventually join the SkyTeam Alliance (“SkyTeam”), of which Air France-KLM is a founding member, and exit the Star Alliance, subject to any relevant approvals and emergence from the chapter 11 process.

04/10/2023**MEPS WANT TO TACKLE INCONSISTENT RULES FOR AIRLINE CARRY-ON LUGGAGE**

In a resolution on uniform standards for airline carry-on luggage, MEPs argue that consistent EU rules on sizing and pricing are needed. The text, adopted with a show hands, highlights citizens’ concerns about the inconvenience and discomfort caused by inconsistent rules on airline carry-on luggage. EU legislation on air passenger rights should be revised to offer a solution, says the resolution.

04/10/2023**IATA SECURES MORE DATA CONTRIBUTORS FOR CO₂ CONNECT**

The International Air Transport Association (IATA) will be adding further airlines and airline groups as data contributors to its CO₂ Connect emissions calculator, hence improving the quality and accuracy of the tool. Respective agreements were signed with Aerolineas Argentinas, Air Baltic, LATAM Airlines Group, Luxair and Nile Air during the first World Sustainability Symposium held on 3-4 October 2023 in Madrid, Spain.

09/10/2023**EASYJET SIGNS UP TO AIRBUS’ PIONEERING CARBON REMOVAL SOLUTION**

easyJet has become the first airline in the world to sign a contract with Airbus for its carbon-removal initiative. Available through the Airbus Carbon Capture Offer, the technology uses Direct Air Carbon Capture and Storage (DACCS), to offer airlines worldwide carbon removal credits to advance their decarbonisation goals. DACCS technology filters and removes CO₂ emissions directly from the air using high powered extraction fans. Once removed from the air, the CO₂ is safely and permanently stored in underground reservoirs. CO₂ emissions released into the atmosphere during aircraft operations cannot be directly eliminated at source but with DACCS, an equivalent amount can be extracted from the air. The technology is complementary to other carbon reduction technologies such as the use of Sustainable Aviation Fuel (SAF).



Source: Airbus

09/10/2023**FINAL ADOPTION OF REFUELEU AVIATION COMPLETES 'FIT FOR 55' LEGISLATION, PUTTING EU ON TRACK TO EXCEED 2030 TARGETS**

The European Commission welcomes today's adoption of two final pillars of its 'Fit for 55' legislative package for delivering the EU's 2030 climate targets. With the adoption today of the ReFuelEU Aviation Regulation and the revised Renewable Energy Directive, the EU now has legally binding climate targets covering all key sectors of the economy. Ahead of the crucial COP28 UN Climate Conference, and next year's European elections, this package of legislation shows that Europe is delivering on its promises made to citizens and international partners to lead the way on climate action and shape the green transition for the benefit of citizens and industries. The final legislative package is expected to reduce EU net greenhouse gas emissions by 57% by 2030

09/10/2023**SINGLE EUROPEAN SKY: ANNUAL MONITORING SHOWS IMPACT OF CONTINUED LACK OF AIR TRAFFIC MANAGEMENT CAPACITY WITH NEGATIVE CONSEQUENCES FOR ENVIRONMENT AND CLIMATE**

The Performance Review Body (PRB) has published the 2022 Annual Monitoring Report and Traffic Light System as part of its annual monitoring of the performance of the Member States of the Single European Sky (SES). The Annual Monitoring Report evaluates the performance of the monopoly air traffic service providers of Member States against four key performance areas:

safety, environment, capacity, and cost-efficiency. The Traffic Light System also captures the environmental performance of air traffic management. It takes different stages of a flight from gate to gate into account based on performance indicators established by the Performance and Charging Regulation of the Single European Sky

10/10/2023**EUROPEAN AVIATION COMMITS TO DELIVER THE WORLD'S MOST EFFICIENT, ENVIRONMENTALLY FRIENDLY SKY**

Associations representing the European aviation sector today adopted a joint industry declaration announcing their intention to make Europe the most efficient and environmentally friendly sky to fly in the world. In line with the EU's Green Deal objective of reaching climate neutrality by 2050, and to optimise capacity in the skies, associations representing airlines, airports, air navigation service providers, aviation manufacturers and business aviation have committed to joint action. They

aim to transform the sector and work together to maximise capacity in the air, whilst further reducing the environmental footprint of flying.

As a first immediate step, the associations will work together to update the EU ATM Master Plan, which serves as the common roadmap for SESAR.

With this declaration, the associations confirm their commitment to work together to make their industry truly sustainable and more efficient, for the benefit of all Europeans.

12/10/2023

BOEING, NASA, UNITED AIRLINES TO TEST SAF BENEFITS WITH AIR-TO-AIR FLIGHTS

In a collaboration to strengthen sustainability in aviation, Boeing [NYSE: BA] is partnering with NASA and United Airlines for in-flight testing to measure how sustainable aviation fuel (SAF) affects contrails and non-carbon emissions, in addition to reducing the fuel's life cycle climate impact.

Boeing's second ecoDemonstrator Explorer, a 737-10 destined for United Airlines, will fly with 100% SAF and conventional jet fuel in separate tanks and alternate fuels during testing. NASA's DC-8 Airborne Science Lab will fly

behind the commercial jet and measure emissions produced by each type of fuel and contrail ice particles. NASA satellites will capture images of contrail formation as part of the testing.



Source: Boeing

13/10/2023

ERA APPOINTS NEW PRESIDENT AND WELCOMES NEW BOARD MEMBERS

Newly appointed President Jesper Rungholm, CEO, DAT Group brings extensive experience and a commitment to addressing the challenges of regional aviation, emphasising the importance of sustainable flying and regional connectivity.

- ERA welcomes 11 newly elected representatives to its esteemed Board, reflecting the association's dedication to collaboration within the aviation industry.

The European Regions Airline Association (ERA) is delighted to announce the results of its Board elections, as part of the association's Annual General Meeting (AGM) held in Innsbruck, Austria. The AGM concluded

yesterday with the unveiling of 11 newly elected representatives who will serve on the ERA Board for the next three years. ERA takes pride in the diverse and dynamic composition of its Board, which includes senior professionals from various stakeholders within the aviation industry.

The airline representatives include:

- Jasmin Bajic, President and CEO, Croatia Airlines (re-elected)
- Johanna a Bergi, CEO, Atlantic Airways (re-elected)
- Carlos Bertomeu, CEO, Air Nostrum (re-elected)
- Nico Bezuidenhout, CEO, Auriigny Air Services (elected)

- Andrew Kelly, Director, Corporate Affairs, ASL Airlines Ireland (re-elected)
- David Manzananas, Managing Director, Binter (re-elected)
- Jiri Marek, CEO, Air Serbia (elected)
- Jesper Rungholm, CEO, DAT Group (elected as President)
- Mikael Wangdahl, VP Head of Airline Operations, SAS Link (re-elected)

And the non-airline member representatives:

- Simon McNamara, Director of Government and Industry Affairs, Heart Aerospace
- Saskia Reijnen, SVP Marketing, Abelo

19/10/2023

RYANAIR HAS PURCHASED 500 TONNES OF SUSTAINABLE AVIATION FUEL (SAF) FROM OMV

Ryanair has today (19th Oct) purchased 500 tonnes of sustainable aviation fuel (SAF) from OMV, the international integrated oil, gas and chemicals company. This agreement will save over 1,250 tonnes in CO₂ emissions (equivalent to c.100 Ryanair flights from Dublin to Vienna).

This purchase follows on from the MoU agreement made between the companies last year, providing Ryanair with unique access to purchase up to 160,000 metric tonnes of SAF from OMV up to 2030.

corporate.ryanair.com



23/10/2023

UPDATED GUIDANCE TO STATES ON FLIGHTS OVER OR NEAR CONFLICT ZONES

ICAO has released updated guidance today to help aviation regulators and operators manage their airspace in times of conflict, including the decision on whether or not to allow flights over or near conflict zones.

The Third Edition of the Risk Assessment Manual for Civil Aircraft Operations Over or Near Conflict Zones has now been expanded to encompass advice for States and operators regarding the risks from surface-to-air missiles (SAMs), ballistic missiles, surface-to-surface missiles (SSMs), air-to-air missiles (AAMs), and to provide guidance on conducting conflict zone airspace closures and reassessing post conflict zone airspace.

24/10/2023

A4A STATEMENT ON CONFIRMATION OF MICHAEL WHITAKER TO LEAD THE FAA

The following statement was issued by A4A President and CEO Nicholas E. Calio upon the confirmation of Michael Whitaker for FAA Administrator:

A4A congratulates Michael Whitaker on his overwhelming bipartisan confirmation. We thank Senate leadership for their prompt attention to this nomination on the Senate floor. We especially appreciate Senate Commerce Committee Chair Maria Cantwell and Ranking Member Ted Cruz for their support and careful review of Administrator Whitaker's credentials and experience.

We look forward to working collaboratively with the administrator to address the critical issues facing our National Airspace System, including air traffic control staffing shortages and NextGen modernization implementation. These complex challenges underscore why steady, permanent leadership at the agency is necessary, especially given the anticipated growth in demand for passenger and cargo air transportation. We are confident Administrator Whitaker will tackle these challenges and others at the agency head-on.

A4A remains a steadfast partner as we continue work on our shared goal of ensuring U.S. air travel remains not only the safest in the world but also efficient, affordable and accessible.

25/10/2023

CITY AIRLINES TO START FLIGHT OPERATIONS IN SUMMER 2024

Lufthansa Group's newly established City Airlines will start flight operations in the summer of 2024. The airline was founded last year and received its Air Operator Certificate (AOC) from the German Federal Aviation Authority back in June. It will operate its flights from the Munich and Frankfurt hubs and thus also offer feeder flights for Lufthansa. City Airlines will operate alongside Lufthansa CityLine. Recruitment of operational staff will begin in November 2023, with pilots and cabin crew members needed for the launch. The competitive strengthening of the short-haul network is essential for the market position of Lufthansa Group and for the planned growth of the long-haul segment in the German market.



26/10/2023

SOUTHWEST AIRLINES ORDERS 108 ADDITIONAL BOEING 737 MAX JETS

Boeing [NYSE: BA] and Southwest Airlines announced today the carrier is increasing its commitment to the fuel-efficient 737 MAX family with an order for 108 737-7s. The new deal supports Southwest's modernization strategy and provides flexibility to expand its fleet.



June 4th

Hermes hosts a reception at the 2023 IATA AGM in Istanbul

Hermes hosted its reception on Sunday 4th June during the IATA AGM that was held in Istanbul. The reception was possible thanks to IATA and the kind sponsorship of A4A. During the reception Dr Kostas Iatrou, Director General of Hermes, presented a commemorative book for the 10th anniversary of Hermes.



June 7th

Mehmet T. Nane elected Board Member of Hermes

During the 2023 Hermes AGM & Leaders Forum that took place in Istanbul, kindly hosted by Pegasus Airlines, Mehmet T. Nane, Chairperson of Pegasus Airlines was unanimously elected member of the Board of Directors of Hermes. Chairperson of the Board of Directors of Pegasus Airlines, Mehmet T. Nane, welcomed guests and commented on his appointment as member of the Board of Directors: "It is with great pleasure that I welcome you to our home city, a centre of commerce for centuries and, more recently, one of the busiest airline hubs in the world. It is a great honour to join as a Board Member in this esteemed organisation. I look forward to working closely with the board and sharing experiences and solutions for the future."



June 27th

President and the Director General of Hermes meet with the President of ICAO

During the ACI EUROPE/WORLD Annual General Assembly, Conference & Exhibition 2023 that was held in Barcelona Angela Gittens, President of Hermes and Dr Kostas Iatrou, Director General of Hermes met and discussed the promotion of aviation and collaboration among the different stakeholders, with Salvatore Sciacchitano, President of Council, ICAO. Ms Gittens and Dr Iatrou thanked Mr Sciacchitano and ICAO for their active contribution to Hermes all these years and presented to him the commemorative book for the 10th anniversary of Hermes.

August 26th

The Director General of Hermes meets with the Director General of CANSO

Dr Kostas Iatrou, Director General of Hermes – Air Transport Organisation had the opportunity to meet with the Simon Hocquard, Director General of CANSO. The two men discussed the latest developments in air transportation especially regarding the International Aviation Forum. Also agreed to strengthen the cooperation between the two organisations.



September 22nd

Hermes and ASA sign MoU

During ASA Leadership Forum held in Athens on Friday 22 September, Airport Services Association – ASA and Hermes – Air Transport Organisation, have signed a Memorandum of Understanding to deepen their cooperation. Dr Kostas Iatrou, Director General of Hermes said: "I am really pleased to sign the MoU with ASA. ASA plays a critical role in the aviation chain. This memorandum will strengthen our established relationship."

Grand Hyatt, Athens | 20th – 22nd September 2023



October 24th

The Director General of Hermes participates at the 2023 ECAC/EU Dialogue

European aviation leaders have come together in Valencia for the 12th edition of the ECAC/EU Dialogue, reaffirming their commitment to sustainable aviation. This key event is organised every three years since 1995, and this edition brought together 140 participants, including high-level aviation policymakers, airline and airport leaders, air navigation service providers, environmental stakeholders, aircraft manufacturers, aviation academics, representatives of financial institutions, as well as international and regional organisations. Participants gathered to address sustainability across social, environmental and economic dimensions, to develop a shared vision for a balanced, resilient, and responsible future for European aviation. Dr Kostas Iatrou, Director General of Hermes – Air Transport Organisation participated in the event.



October 31st

Hermes participates at the 56th Annual General Meeting of the Arab Air Carriers' Organization

The 56th Annual General Meeting of the Arab Air Carriers' Organization (AACO) was held between 30 October and 01 November 2023 in Riyadh, hosted by Saudia under the Patronage of His Excellency Engr. Saleh bin Nasser Al-Jasser, Minister of Transport and Logistic Services and the Chairman of the Board of Directors of Saudi Arabian Airlines Corporation, with the participation of more than 200 Arab and global aviation experts gathering Chief Executive Officers of AACO member airlines, partner airlines and industry partners from aircraft and engine manufacturers, global distribution systems, information technology partners and others. The Directors General of the Arab Civil Aviation Organization and the International Air Transport Association also attended the AGM. Dr Kostas Iatrou, Director General of Hermes – Air Transport Organisation represented the organisation.





SALVATORE SCIACCHITANO

President of the
Council, ICAO



| ICAO



How can the aviation industry attract new employees?

As aviation professions are increasingly not perceived as attractive enough to potential candidates, there is significant competition with other industry sectors for skilled employees. Therefore there is a need for the aviation industry to align with competition and propose attractive work conditions to potential candidates.

Furthermore, training capacity is insufficient to meet demand, and there is a lack of accessibility to affordable training. This means that we should facilitate access to affordable training to attract candidates, including through the promotion of scholarships.

ICAO's Next Generation of Aviation Professionals initiative should be mainstreamed into all global and regional strategic aviation plans of aviation, including the ICAO Global air navigation and aviation safety and security plans. Job marketing and branding should be enhanced, including through social media, speed networking, both academic and career fairs, and mentorship.

We also need to invest in corporate social responsibility programmes that attract and retain diverse and skilled professionals. Here we can look to better recast careers in aviation to focus on the social and sustainable development benefits of flight, highlighting the industry's unique worldwide commitments to

decarbonization, aviation's role in connecting people and cultures of the world, its humanitarian relief role, and its other key positive influences on sustainable development and growth, especially for lesser developed, landlocked, and small island States.

This includes the promotion of diversity, inclusion and gender equality. We need to stress the message there is a role in aviation for everyone who has the skill and the ability, and reject pushback and misperceptions on this point. We should look at creating special programmes adapted to the realities for the populations that are under-represented in our industry, including persons living with disabilities.



We also need to promote the mutual recognition of academic degrees and certifications to support a seamless flow of professionals within the global aviation eco-system.

Likewise, some aviation disciplines lack a harmonization of competencies and recognition of certification, which is an obstacle to the workforce global mobility. Harmonizing compe-

tencies will also facilitate recruitment of international employees and global mobility.

Finally, I would like to highlight that



we need to better promote the life long career-development opportunities that exist within aviation – that our industry offers strong pathways of continuous career progression.

What advice can you provide to your constituent firms and organisations for successfully attracting talent, given stiff competition from many other industries?

This question is in many respects similar to the first one, and I could repeat many of the same points.

I would however like to highlight the importance of strengthening States's commitment to supporting aviation organizations and busi-

nesses in implementing appropriate policies to institutionalize HR capacity-building, taking into consideration mainstreaming of young aviation professionals and gender equality.

I would also like to use this platform to encourage member States to reinforce interaction between their aviation and education ministries and administrations, to integrate aviation into curricula, and to facilitate the marketing of aviation through new programmes. I encourage governments to start introducing aviation from the grassroots of the children's education.

Partnerships between States, academia and industry would furthermore harmonize strategies for pro-

moting aviation careers, and help to launch educational programmes that are fully aligned with regulatory and industry needs and priorities. Facilitating the creation and implementation of specialized aviation programmes, practical training, and scholarships that are in line with industry needs is in fact essential.

We also need to promote best management practices that accommodate the needs and values of the next generation of aviation professionals to enhance their interest, commitment, productivity, performance and retention. This includes providing avenues for their continuous upskilling, to meet the accelerated pace of innovations and introduction of new technologies.

How can the aviation industry retain its current employees?

The factors I have just mentioned will help not just attract professionals, but retain them too. There are however aspects that are specific to retention.

Firstly, we need to promote transformative management systems, offer incentives and flexible working arrangements to build passion, commitment, motivate improve morale and facilitate employee performance.

This is linked to actively learning and understanding the work culture and preferences of the next generation aviation professionals, and adjust requirements that accommodate their needs to the highest extent possible.

Along with the progressive human resource policies that promote equal opportunities and diversity that I mentioned earlier, we also need to develop progressive social policies and value-added programmes to safeguard the professionals' well-being working in the aviation industry.

What advice can you provide to firms and organisations to ensure that personnel have the necessary skills to advance the industry in the 21st century?

In the first instance, the fact is that skill development will require investment. This investment needs to target research, innovation, training and development, to help aviation professionals adapt to changing technologies to remain resilient and competitive in the job market.

Training programmes on advanced technologies specifically are particularly crucial to developing the technical skills and competencies



that aviation professionals will need in order to thrive.

Here, incubation programmes can help support innovation and keep organizations abreast with new technologies.

Similarly, enhanced collaborative linkages between educational and training institutions with industry will facilitate the alignment of industry capacity requirements with training and competency development programmes offered to Next Generation Aviation Professionals.

These should be supported and delivered with training centres of excellence that offer specialized courses and programmes for a diverse workforce.

How can industry associations work together with aviation firms and other stakeholders to ensure that the industry attracts and retains talent from a diverse employment pool?

Industry associations can play a key role in helping ICAO advocate for action on the points I have raised.

They can help determine potential standard industry approaches to

addressing its challenges, minimize duplication of efforts and optimize utilization of resources.

They can also help identify the requirements for rare specializations in aviation, acting in liaison with academia and training institutions to foster curricula relevance in terms of industry requirements.

Associations can provide a platform for pooling resources, including for the provision of scholarship opportunities and financial support to underrepresented groups, while boosting mentorship programmes and support, and proactively supporting internship programmes, especially for so-called "hard to attract" highly specialized aviation subjects.

I would like to suggest that associations look at implementing leadership exchange programmes and enhancing other knowledge-sharing opportunities to expand knowledge and competency frameworks. This could even include the creation of a global database of specialized talent pool of experts in emerging areas of specialization, with a view of centralizing support for the development of next generation aviation professionals in these specialized fields.



EVENTS



2023

HERMES AGM & LEADERS FORUM

Recruiting and Retaining Talent: The Key to Success in the Aviation Industry

Wednesday 7 June · 2023 · Istanbul · Türkiye

Host Organisation

PEGASUS





2023 Hermes AGM & Leaders Forum

On Wednesday 7 June 2023, Hermes – Air Transport Organisation held the “Hermes AGM & Leaders Forum – Recruiting and Retaining Talent: The Key to Success in the Aviation Industry”, hosting prominent leaders of the global aviation industry.

The 2023 Hermes AGM & Leaders Forum that took place in Istanbul, kindly hosted by Pegasus Airlines, thanks to the initiative of our esteemed Hermes member and Chairperson of Pegasus Airlines, Mehmet T. Nane

Dr Kostas Iatrou welcoming the participants said: “I am pleased to welcome you to the 2023 Hermes AGM and Leaders Forum in Istanbul, a city that has always played an important role in the history of humanity as it stands at the crossroads that connects the East and the West. The recent health crisis had a negative impact on

the industry workforce as many jobs were lost. The fast recovery of the industry, faster than expected, caused a chaos last summer. Hermes being the organisation that represents the leaders, the human factor, of air transport industry believes that the success of our business is closely related to this parameter.”



2023 Hermes AGM & Leaders Forum



In his annual report Dr Iatrou made an analytical presentation of the key activities, including the formation of International Aviation Forum (IAF) and events that Hermes organised in the last 12 months.

During Hermes AGM, **Mehmet T. Nane**, *Chairperson of Pegasus Airlines* was unanimously elected member of the Board of Directors of Hermes. Hermes also welcomed 5 new members namely (in alphabetical order):

- **Tamara Archuadze**, *Member of Supervisory Board, United Airports of Georgia*
- **Mara El Filali**, *General Manager, Moroccan Aerospace Industries Association (GIMAS)*



- **Levan Karanadze**, *Chairman of Supervisory Council, Georgian Air Navigation*
- **Riccardo Lambiris**, *Chairman, Athens International Airport*
- **George Lioumbis**, *General Manager, SkyExpress*

KEYNOTE SPEAKERS of the Leaders Forum where **Salvatore Sciacchitano**, *President of the Council of ICAO* (virtually) and **Luis Felipe de Oliveira**, *Director General of ACI World*.

Angela Gittens, *President of Hermes* moderated a round table discussion with the participation of:



2023 Hermes AGM & Leaders Forum

- **Patricia N. Vercelli**, *SVP, General Counsel and Secretary, A4A*
- **Abderahmane Berthe**, *Secretary General, AFRAA*
- **Montserrat Barriga**, *Director General, ERA*
- **Maria El Filali**, *General Manager, Moroccan Aerospace Industries Association (GIMAS)*
- **Haydar Yalcin**, *Senior Expert, EUROCONTROL*

They all stressed the need and the difficulty to retain and to recruit well trained and experienced personnel, including pilots and technicians. Realizing this problem, there is now closer cooperation not only between the different sectors of the industry but also between the air industry and the universities to establish specialized training programmes and to make the industry

"attractive". This is especially more important now for the industry that has increased safety standards and economic and financial pressures. At the same time there are a lot of different interests with different priorities which makes consensus difficult. They admitted that in terms of recruitment the air industry is not the "sexiest" one but there have been significant improvements in diversity and sex equality and technology. Companies need to get better at retraining people to work with the newest technology. They stressed that some of the air traffic management issues are not due to staff shortages but to lack of training. As the most attractive sector is at the moment technology, the sector needs to show and promote the idea that it is at the forefront of technology, to "rebrand" the recruitment sector to make it "more creative, more forward looking". It is the industry that needs to locate the workforce to be hired.



2023 Hermes AGM & Leaders Forum

***Recruiting and Retaining Talent:
The Key to Success in the Aviation Industry***

A recent report by Oxford Analytics states that 2.3 million jobs have been lost across airlines, airports, and civil aviation groups since the outbreak of the covid-19 pandemic, a 21 percent reduction from pre-pandemic levels. Although employee layoffs conserved cash during the low points of the pandemic period, the decisions to reduce workforces have had longer term consequences. As travel restrictions eased and demand for air travel increased, sectors of the aviation industry have been confronted with severe staffing shortages, leading to reduced schedules, flight delays

and cancellations, lost baggage, and disgruntled passengers. It is evident that the aviation industry will have to hire and train extensively over the next several years to meet labor requirements. Moreover, aviation firms will need to retain existing employees, a difficult task given the preponderance of shift work and travel requirements in the industry. The labor shortage will require firms to be proactive in their approaches to hiring, training, and retaining workers. For example, United Airlines instituted its Aviate Academy to attract and train pilots, and this year successfully graduated



2023 Hermes AGM & Leaders Forum

its first class of fifty-one trainees. United views the Aviate Academy as a key resource in its efforts to hire 10,000 pilots by the end of the decade.

Aviation industry associations, including ACI World and the National Business Aviation Association (NBAA), have provided advice to their members on hiring and retaining workers. Broad guidelines outlined in industry publications include, carefully analyzing the competitive environment, addressing work-life balance concerns, and providing clear career paths

for advancement. Many industry experts agree that compensation, alone, is insufficient to keep employees in the fold. "Quality of life is a big part of attracting and retaining good people."

Industry specialists suggest that aviation firms will need to seek out a more diverse workforce to meet labor requirements. Pilots in the US, for example, are predominantly male and overwhelmingly White. Clearly, drawing talent from a more diverse population can help alleviate labor shortages in the industry.



2023 Hermes AGM & Leaders Forum





2023 ECAC/EU DIALOGUE

with the European air transport industry

Valencia, Spain
24-25 October 2023



Flying sustainability – from buzz to reality

European aviation leaders have come together in Valencia for the 12th edition of the ECAC/EU Dialogue, reaffirming their commitment to sustainable aviation. This key event is organised every three years since 1995, and this edition brought together 140 participants, including high-level aviation policymakers, airline and airport leaders, air navigation service providers, environmental stakeholders, aircraft manufacturers, aviation academics, representatives of financial institutions, as well as international and regional organisations. Participants gathered to address sustainability across social, environmental and economic dimensions, to develop a shared vision for a balanced, resilient, and responsible future for European aviation.

In his opening remarks, **David Benito Astudillo**, Director General of Civil Aviation for Spain, whose country holds the EU Presidency for the second half of 2023, highlighted the importance of the meeting. The ECAC/EU Dialogue is a pivotal moment for the European aviation sector, providing a platform to discuss and find solutions, and an opportunity for aviation leaders to steer the industry towards a more sustainable and responsible future. Mr Astudillo stated that “it is important to have a resilient transport system, and we should be aware of the human factor, and how important the social dimension is. Highly qualified persons in the aviation industry are needed.”

Alessio Quaranta, ECAC President and Director General of Civil Aviation for Italy, emphasised the role of connectivity as a catalyst for prosperity. He focused on

aviation’s essential role in fostering social, cultural and economic opportunities by enabling the exchange of people, ideas and values within Europe and beyond. “Air transport is not merely about moving from one place to another; it is about delivering services. This is true whether air transport is connecting families and businesses; providing cultural, educational and leisure opportunities; or providing a lifeline to remote communities that otherwise could struggle to connect”, Mr Quaranta said.

Filip Cornelis, Director of Aviation, DG MOVE, European Commission, added: “Aviation has long been a symbol for progress and human achievement. Aviation revolutionised the way we travel, we do business, and we interact with each other. However, this comes with several multifaceted and interrelated challenges, in-

ECAC/EU Dialogue: Flying sustainably — from buzz to reality

October 2023, Valencia



Source: ECAC

cluding social, environmental, and economic aspects. The Dialogue is therefore an opportunity to brainstorm new ideas, and the decisions we make today will shape the future of European aviation, determining its sustainability and impact on the environment. In concluding his intervention, Mr Cornelis said that “collaboration is the key to achieving our shared goals”.

The main outcomes of the meeting were included in a statement that was adopted at the end of the Dialogue. The statement aims to serve as a basis to shape future work on sustainability.

Valencia (Spain), 24-25 October 2023

Embracing sustainability: a prosperous aviation sector centred on people and planet

The ECAC/EU Dialogue participants recognise that achieving true sustainability in European civil aviation requires a holistic approach. By embracing the interdependent dimensions of social, environmental, and economic sustainability, we strive to build a balanced and resilient aviation industry in Europe and for European citizens.

Instead of treating these pillars in isolation, we understand that their collective strength fuels progress and

drives positive change. We embark on a journey towards a sustainable future for European aviation.

The ECAC/EU Dialogue participants:

Acknowledging the essential role of aviation in facilitating Europe’s connectivity and enhancing social, cultural and economic opportunity by facilitating the exchange of people, ideas, and values across Europe and beyond;

Stressing/Underlining that connectivity boosts economic development and growth by supporting the competitiveness and innovation of the European aviation sector, creating jobs and value-added activities, and enhancing trade and tourism flows;

Recognising that the European aviation sector must be socially sustainable: meaning that we need to take proactive steps to identify and address skills and labour market issues to secure high quality working conditions and maintain the sector’s attractiveness for the future;

Recognising the key role of skills and workforce as an enabler of the sector to ensure we are prepared to meet future challenges, such as decarbonisation and automation;

Emphasising the need to attract and retain diverse talents, provide equal opportunities for all, and foster a

supportive and more inclusive industry that thrives for gender equality;

Reaffirming the commitment to address the environmental challenges faced by the aviation industry, including the goal of achieving net-zero CO₂ emissions by 2050, as adopted by the International Civil Aviation Organization (ICAO), the objectives of the EU Fit-for-55 package and decarbonisation targets adopted by European States and industry;

Highlighting the importance of environmental sustainability and the promotion of sustainable aviation technologies, operations, and infrastructure to reduce the carbon footprint of the industry and contribute to the targets of the Paris Agreement – as also set out in the Destination 2050 roadmap;

Underlining the commitment to collaboration between governments and industry stakeholders to increase the production, availability, and uptake of sustainable aviation fuels, actively reducing the environmental impact of the aviation sector, and recalling the activities of the Renewable and Low Carbon Fuels Alliance;

Emphasising that in addition to reduction of fossil CO₂ emissions, the non-CO₂ impacts of aviation need also to be addressed based on on-going research and recognising that many fossil CO₂ reduction measures in aviation also reduce non-CO₂ impacts;

Enhancing economic sustainability in European aviation by guaranteeing that regulation is fit for purpose to safeguard and promote market access, ensuring fair competition, and achieving connectivity for all its citizens;

Recognising that sustainability in aviation is not achievable without a robust approach to safety and security;

Promoting accessibility and consumer protection as vital tools on the journey to achieving social sustainability;

Expressing explicit support to the Ukrainian people and to all Ukrainian aviation stakeholders, victims of the aggression by Russian Federation; and

Addressing the economic impact on European aviation and threat to sustainability caused by this war, and other conflicts, and the need to mitigate negative consequences for all stakeholders; have agreed to call on all stakeholders across European civil aviation to:

Strive to foster a safe, inclusive, and supportive work environment, to attract, develop, and retain diverse talents in the aviation sector, promoting inclusivity, equal opportunities, and career advancement;

Take all measures and implement the “call to action” from the ICAO Global Aviation Gender Summit held in Madrid;

Build partnerships with local and national authorities,

universities, education and training programmes focused on aviation, which have the potential to yield significant benefits towards tapping into the potential of young professionals and attracting them in the aviation sector;

Invest in research and innovation, to develop and deploy sustainable aviation fuels, cutting-edge technologies, operational optimisations, and safe and efficient infrastructure;

Collaborate to increase the production, availability, and uptake of sustainable aviation fuels, to actively reduce their carbon footprint and promote a greener aviation industry and support efforts at the international level in the run-up to the 3rd ICAO Conference on Aviation and Alternative Fuels - CAAF/3;

Enhance the competitiveness of European aviation on the global stage, ensuring a level playing field for fair competition in Europe and beyond;

Ensure a just transition means moving towards sustainability in a way that is as fair and inclusive as possible to everyone concerned, creating decent work opportunities and leaving no one behind;

Engage in consistent dialogues to establish proportionate and effective policies that support the growth and sustainability of the aviation sector;

Establish regular round tables to explore the best methods and options to enhance sustainability in all its forms in aviation; and

Support the air connectivity of islands and remote regions that face connectivity challenges, by providing specific measures to ensure their effective access to sustainable aviation fuels, technologies, and infrastructure, and to mitigate the social and economic impacts of the green transition.

It is vital to balance the need for economic growth with limiting the negative impact of aviation on the environment, and maintaining a fair and trustworthy social framework. This approach is needed to ensure the emergence of a truly sustainable sector that continues to grow and provide global benefits in terms of economic growth, and territorial cohesion.

By working collectively, maintaining regular contact, identifying bottlenecks, designing and implementing ways to solve them, with the objective of reaching/building/achieving holistic social, environmental, and economic sustainability, we aim to shape a resilient, responsible, and competitive European aviation industry that overcomes the challenges it faces, helps European citizens reap the benefits of the connectivity which aviation brings, and contributes to a better future.



AACO 56th Annual General Meeting

AACO 56th Annual General Meeting, that was held in Riyadh, Kingdom of Saudi Arabia, encouraged governments to respect and abide by programs that they agree on with other states under the umbrella of the International Civil Aviation Organization, especially when it comes to climate change that is best addressed globally as it is a global issue, and to do their share in the basket of measures for reaching aviation's environmental targets especially in optimizing air traffic management, investing in infrastructure improvements, developing supportive policies, and easing certification processes of technologies and cleaner energy



AACO 56th Annual General Meeting, that was held in Riyadh, Kingdom of Saudi Arabia, encouraged governments to respect and abide by programs that they agree on with other states under the umbrella of the International Civil Aviation Organization, especially when it comes to climate change that is best addressed globally as it is a global issue, and to do their share in the basket of measures for reaching aviation's environmental targets especially in optimizing air traffic management, investing in infrastructure improvements, developing supportive policies, and easing certification processes of technologies and cleaner energy.

The AGM also urged airports to develop the infrastructure that would enable the deployment and uplift of cleaner energies for the use of airlines across the spectrum of their operations, and aircraft and engine manufacturers to continue their drive for developing the engine and aircraft technologies and to focus primarily on game-changing developments that would enable the airlines to achieve their environmental targets.

With regards to the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA), the AGM encouraged governments to register their environmental projects at ICAO to be able to issue carbon offsetting

certificates eligible for use under CORSIA so as to make available enough certificates for airlines to use for compliance to CORSIA.

On the same topic, the AGM called upon ICAO member states to work towards including the following in the results of ICAO's Third Conference for Sustainable Aviation Fuel that will be held in Dubai on 20-24 November 2023:

- A) Encourage governments to adopt policies to incentivize the production of SAF rather than imposing levies, penalties, and mandates.
- B) Have a mechanism in place that enables airlines to claim the reductions in emissions achieved when they use cleaner energy such as sustainable aviation fuels and low carbon aviation fuels.
- C) ICAO states to agree on developing a global SAF accounting mechanism based on a robust chain of custody to enable SAF to be used by any airline anywhere in the world, even if physical availability is restricted.
- D) ICAO states to agree to standardize the certification criteria for sustainable aviation fuels to enable airlines to be credited for emissions reduction when using SAF under any scheme.

الجمعية العامة السادسة والخمسون للإتحاد العربي للنقل الجوي AACO 56th AGM



The AGM witnessed the signature of two Memoranda of Understanding between the Arab Air Carriers' Organization and SITA, launching two solutions; namely, the Sustainability Management Solution, and the Travel Digital Identity. AACO has identified sustainability and digital travel as the immediate two priorities for AACO, within its strategic direction to assist airlines in their digital transformation. Within less than 15 months, AACO delivered in partnership with SITA the two solutions which are being piloted by three airlines members in AACO.

The Sustainability Management Solution will enable airlines to optimize and manage their cost of environmental sustainability and deliver to their customers accurate and credible sustainability-related information about their travels. The Travel Digital Identity solution will be the tool for creating seamless and efficient travel journeys for passengers through airlines, airports and border control agencies. Although AACO members will be the launch airlines of these two solutions, the whole world, including travelers, airlines, airports and governments will benefit from them.

AACO Secretary General's Report

AACO Secretary General, Mr. Abdul Wahab Teffaha, presented his report to the 56th AGM.

The Secretary General underlined that by the end of 2023, the industry will be as close as it can be to the

pre-COVID level of air transport's activity. In 2023, it is expected that the global number of air passengers will reach 4 billion (of which 1.4 billion are international passengers), representing 91.7% of 2019 numbers, and the number in the Arab region will reach 300 million (of which 277 million are international passengers), representing 89% of 2019 numbers.

AACO members recorded a higher load factor than that of the industry; 80.7% vs. 79.1%. This can be attributed to a number of factors being; reasonable policies by Arab states for the containment of COVID-19, advanced and continuous development of infrastructure, quality of service of those airlines, and serving the passenger as a guest instead of merely offering a transport service. Meanwhile, new challenges are looming, including:

1. Increase in operational costs
2. Increase of fuel prices
3. Geopolitical tensions
4. High inflation rates
5. The implications of the extended lockdowns from 2020 to 2022 that disrupted the supply chain and reduced the skills in aviation.

Moving on, the Secretary General emphasized two strategic issues that he referred to as the industry's duties towards the traveling public being; finding ways to make the travel experience an easy one, and ways to

reduce the industry's environmental footprint till it gets to zero.

On the issue of making the travel experience easier, the Secretary General highlighted AACO's efforts, under the directives and supervision of its Executive Committee, to invoke digital transformation in the travel processes to dismantle gradually the complications of air travel processes and enable the passenger to achieve almost the same experience in the customers' travel experience as the one that they are experiencing in their retail shopping.

On the issue of environmental sustainability, the Secretary General reminded everyone of the two global agreements reached under the umbrella of the International Civil Aviation Organization, being the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) and the Long-Term Aspirational Goal of Net Zero Emissions by 2050, and of the attributes agreed globally to ensure that international aviation achieves those targets, as follows:

1. That the agreements reached within ICAO to be the sole agreements to deal with the environmental impact of international air transport. The Secretary General stressed on the importance of abiding by the global solutions, reached at ICAO, to a global issue such as climate change.
2. Developing the air transport infrastructure: as ICAO estimates that the contribution of infrastructure developments amounts to 11% reduction in carbon emissions in 2050.
3. Implementing market measures: which means buying carbon certificates from sources which have reduced their carbon emissions. In this regard, the Secretary General encouraged governments to register their projects that are reducing emissions under the UNFCCC, so those projects produce carbon offsetting certificates for airlines to use to reach their environmental goals.
4. Technological Advancements: Engine and air frame manufacturers to develop game changing technologies.
5. The use of cleaner energy: the use of sustainable aviation fuels and low carbon aviation fuels will be the major contributors to reaching the industry's environmental targets according to ICAO and IATA. The Secretary General highlighted two policy paths that are currently being adopted for that, one is incentive based policies such as the ones in the US and the other are SAF mandates such as the ones in the EU under the RefuelEU law highlighting that some provisions of this law will lead to subject all airlines operating from the EU to a measure that will extend beyond the EU.

In anticipation of the results of the coming ICAO's Third

Conference for Sustainable Aviation Fuels that will be held from 20 to 24 November 2023 in Dubai, the Secretary General called upon the conference to agree on the following principles for the production of cleaner energies:

- Firstly, to call upon states to adopt policies supporting the production and the use of SAF and LCAF, built upon incentives, instead of taxes, penalties, or mandates.
- Secondly, any reduction in emissions from the use of SAF and LCAF needs to be credited to the airlines in whichever program they are operating under, be that CORSIA or otherwise, while avoiding double counting.
- Thirdly, to create an international mechanism of accounting for the use of SAF based on robust chain of custody approaches to enable SAF to be purchased by any airline anywhere in the world, regardless of local physical availability.
- Fourthly, to agree on the standardization of SAF certificates in order to facilitate the recognition of reductions in emissions when SAF and LCAF are used by airlines.

AACO's Annual Report and Annual Air Transport Statistics: Data on the industry's performance at the global and regional levels was distributed to delegates of the AGM through AACO's Annual Report and the Annual Arab Air Transport Statistics bulletin.

The Annual Report recapped AACO's work over the past year that focused on two priorities. The first is environmental sustainability and the second is the importance of digital transformation to the aviation's industry development. In addition, the report included some data and statistics for 2022 and half year of 2023, AACO's areas of work including the AACO fuel project, aero-political issues, aviation's safety and security, engineering and maintenance, ground handling, emergency response planning, and work on in-flight medical emergencies.

The Annual Arab Air Transport Statistics bulletin covered 2022 data and included statistics on the global and Arab world economies, global and Arab air travel and tourism, and AACO member and partner airlines' data.

Major highlights of the data included in the two bulletins are listed here below:

- Total passenger traffic to/from and within the Arab world reached around 273 million passengers; increasing by 111.6% in 2022 compared to 2021, while remaining 18.9% below 2019 levels.
- Passengers using Arab airports in 2022 reached 322.3 million passengers, which is around double the number of 2021, remaining 18.2% below 2019 levels.
- Cargo handled at Arab airports declined by 8.8% in



2022 compared to 2021, reflecting the slowdown in global trade, and consequently air freight. The volume is 17.7% below 2019.

- By the end of 2022, AACO members passenger traffic measured in RPKs, and seat capacity measured in ASKs grew by 138.9% and 66.5%, respectively, compared to 2021. During the first quarter of 2023, AACO members' operations increased significantly, with RPKs reaching around 93.0% and ASKs around 85.3% of 2019 levels while comparing the same period.
- By the end of 2022, AACO members' total fleet reached 1,561 aircraft with in-service aircraft representing 82% (1,273 aircraft). AACO members' order book as at 30 August 2023 anticipates the delivery of 1,293 new aircraft until 2035.
- In 2022, AACO members returned to profitability, achieving USD 72.45 billion (4.4% above 2019 levels) in total revenues, while maintaining their costs at USD 67.79 billion (4.7% below 2019 levels). This has resulted in a net result of USD 4.66 billion with a net margin of 6.4%.

Address by the Director General of the Arab Civil Aviation Organization (ACAO) to the AGM

Eng. Abdennabi Manar, the Director General of ACAO,

gave a speech to AACO's AGM where he covered common issues between AACO and ACAO that were driven by the joint work and continuous dialogue between ACAO's committees and AACO's working groups, especially this year focusing on climate change issues and the discussions and positions that are leading to ICAO's Third Conference for Sustainable Aviation Fuels that will be held in Dubai on 20-24 November 2023.

Arab Aviation Summit AACO invited member airlines, regional and international organizations, industry partners, partner airlines, air transport professionals, and the media to participate in the Arab Aviation Summit that is held annually with the AGM of AACO. The Summit is dedicated to have an open discussion on the state of affairs of the industry and its strategic issues, by hosting a CEOs Panel that addresses those issues.

CEOs' Panel on Industry Issues – Moderated by Mr. Richard Quest / Anchor and Correspondent of CNN. The speakers participating in the discussion were:

1. Mr. Abdelhamid Addou / Chairman of the Board and Chief Executive Officer / Royal Air Maroc
2. Eng. Samer Majali / Vice Chairman/Board Designee CEO / Royal Jordanian
3. Mr. Tony Douglas / Chief Executive Officer / Riyadh Air
4. Mr. Adel Al-Redha / Chief Operating Officer / Emirates

STATISTICS



MAY 2023: Air Passenger Market Analysis

Chart 1 – Global air passengers, revenue-passenger kilometers (RPKs), billions per month

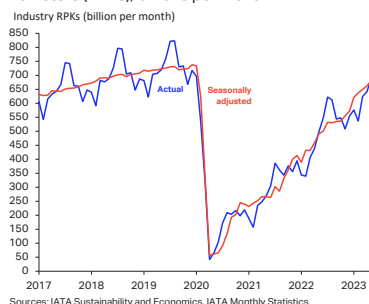


Chart 2 – Passenger load factors, by airline region of registration

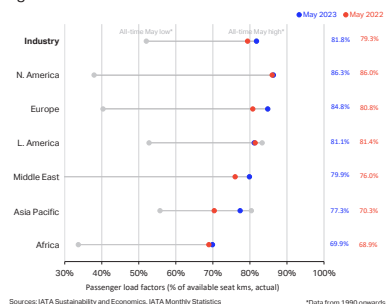


Chart 3 – Domestic RPK growth by airline region of registration, YoY% change versus 2019

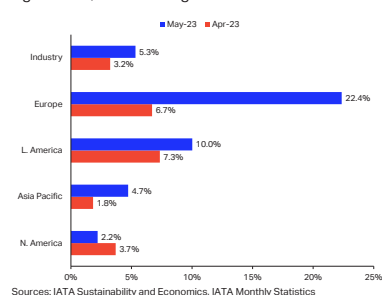


Chart 4 – Domestic RPK growth by market, YoY% change versus 2019

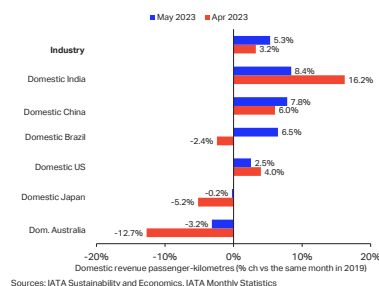


Chart 5 – International RPK growth by airline region of registration, YoY% change versus 2019

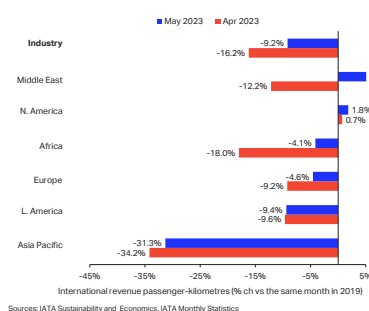


Chart 6 – International RPKs, YoY% change versus 2019 – Top 10 route areas in 2019, ranked by performed traffic level

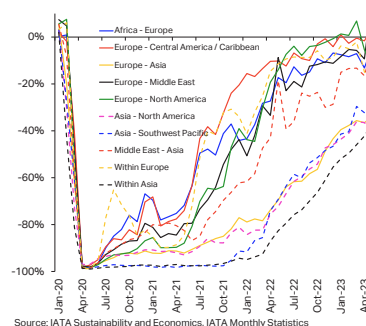
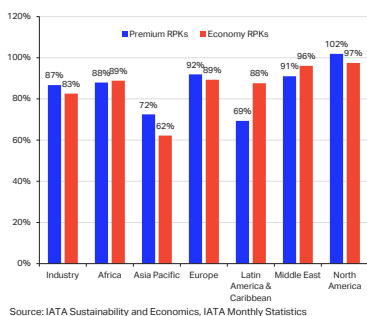


Chart 7 – International RPKs Jan – May 2023 by cabin class, % share of the same period in 2019



Air passenger market overview - May 2023

	World share ¹	May 2023 (% year-on-year)				May 2023 (% ch vs the same month in 2019)			
		RPK	ASK	PLF (%-pt) ²	PLF (level) ³	RPK	ASK	PLF (%-pt) ²	PLF (level) ³
TOTAL MARKET	100.0%	39.1%	35.0%	2.4%	81.8%	-3.9%	-3.9%	0.0%	81.8%
International	58.0%	40.9%	34.7%	3.6%	82.3%	-9.2%	-11.2%	1.8%	82.3%
Domestic	42.0%	36.4%	35.3%	0.6%	81.0%	5.3%	9.4%	-3.1%	81.0%

¹% of industry RPKs in 2022

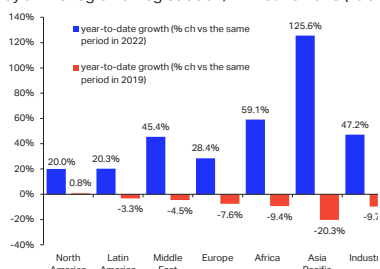
²Change in load factor

³Load factor level



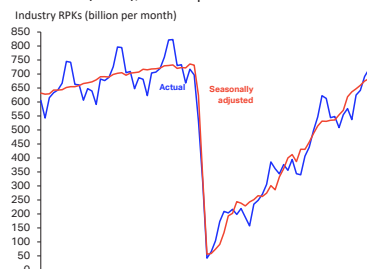
JUN 2023: Air Passenger Market Analysis

Chart 1 – Revenue-passenger kilometer (RPK) growth by airline region of registration, YTD June 2023 (% ch)



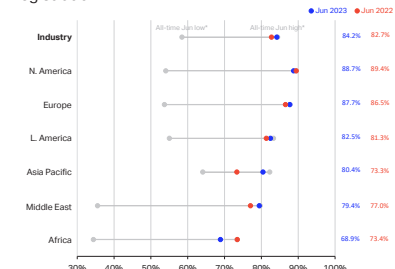
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 2 – Global air passengers, revenue-passenger kilometers (RPKs), billions per month



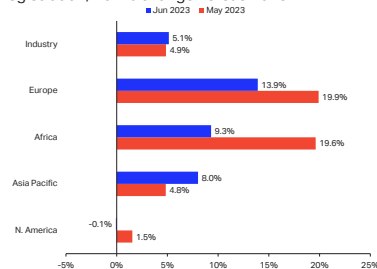
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 3 – Passenger load factors, by airline region of registration



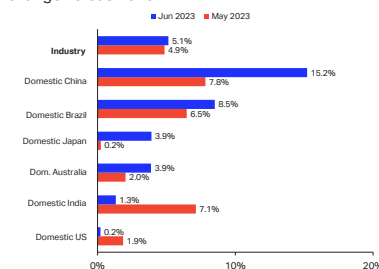
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 4 – Domestic RPK growth by airline region of registration, YoY% change versus 2019



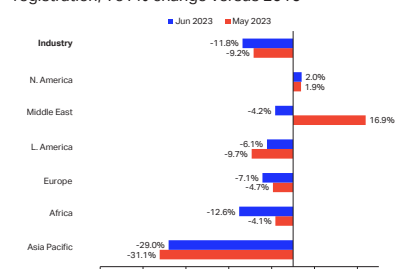
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 5 – Domestic RPK growth by market, YoY% change versus 2019



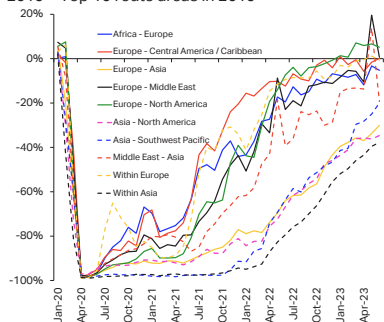
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 6 – International RPK growth by airline region of registration, YoY% change versus 2019



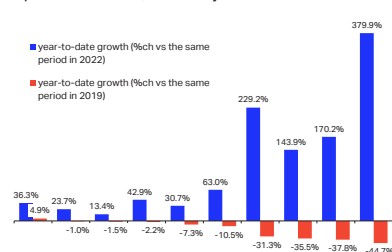
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 7 – International RPKs, YoY% change versus 2019 – Top 10 route areas in 2019



Source: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 8 – International RPKs, YTD June 2023 (% ch) – Top 10 route areas, ranked by 2019 traffic level



Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Air passenger market overview - June 2023

	June 2023 (% year-on-year)				June 2023 (% ch vs the same month in 2019)			
	share ¹	RPK	ASK	PLF (%-pt) ²	RPK	ASK	PLF (%-pt) ²	PLF (level) ³
TOTAL MARKET	100.0%	31.0%	28.8%	1.4%	84.2%	-5.8%	-5.5%	-0.2%
International	58.0%	33.7%	31.7%	1.3%	85.0%	-11.8%	-13.2%	1.4%
Domestic	42.0%	27.2%	24.7%	1.6%	82.9%	5.1%	8.7%	-2.8%

¹% of industry RPKs in 2022

²Change in load factor

³Load factor level



JUL 2023: Air Passenger Market Analysis

Chart 1 – Global air passengers, revenue-passenger kilometers (RPKs), billions per month

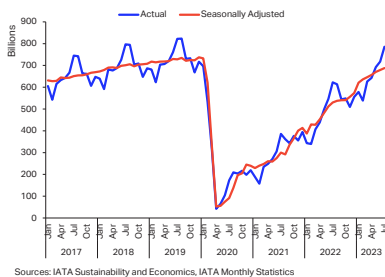


Chart 2 – Global domestic and international revenue passenger-kilometers (RPKs), YoY% change vs. 2019

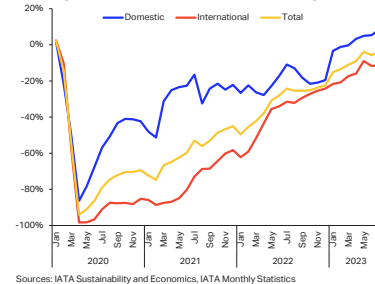


Chart 3 – Domestic RPK growth by market, YoY% change vs. 2019

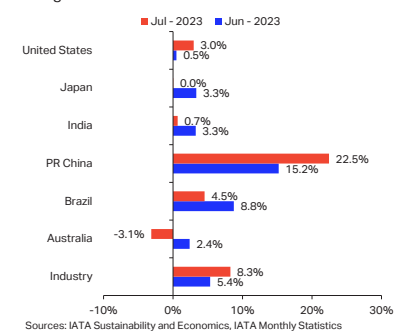


Chart 4 – International RPK growth by airline region of registration, YoY% change versus 2019

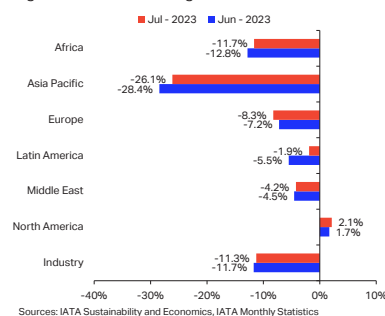


Chart 5 – International RPKs, YoY% change vs. 2019 – Top 10 route areas in 2019

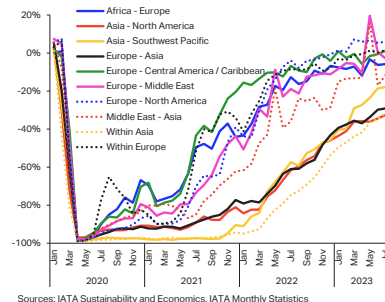


Chart 6 – Passenger load factors (PLF) by airline region of registration, total traffic

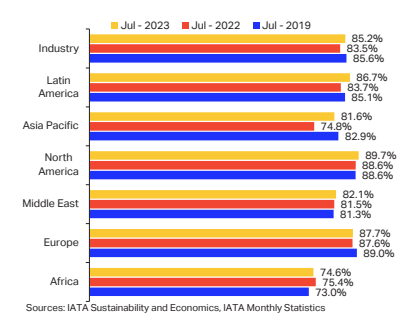
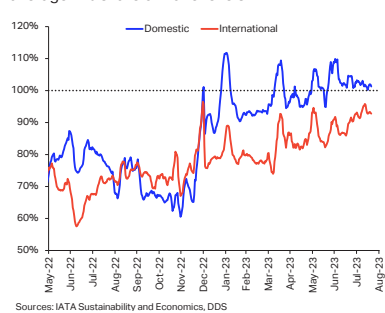


Chart 7 – Ticket sales by purchase date, 7-day moving average - % share of 2019 levels



Air passenger market in detail - July 2023

	World share ¹	July 2023 (% year-on-year)				July 2023 (% ch vs the same month in 2019)			
		RPK	ASK	PLF (%-pt) ²	PLF (level) ³	RPK	ASK	PLF (%-pt) ²	PLF (level) ³
TOTAL MARKET	100.0%	28.2%	23.7%	1.7%	85.2%	-4.4%	-3.9%	-0.4%	85.2%
Africa	2.1%	25.0%	26.3%	-0.8%	74.6%	-8.2%	-10.1%	1.5%	74.6%
Asia Pacific	22.1%	67.1%	53.4%	6.7%	81.6%	-8.8%	-7.3%	-1.3%	81.6%
Europe	30.6%	11.7%	11.5%	0.2%	87.7%	-5.5%	-4.1%	-1.3%	87.7%
Latin America	6.4%	15.5%	11.4%	3.1%	86.7%	3.9%	1.9%	1.6%	86.7%
Middle East	9.8%	21.9%	21.0%	0.6%	82.1%	-4.4%	-5.4%	0.8%	82.1%
North America	28.8%	13.2%	11.9%	1.0%	89.7%	2.4%	1.2%	1.0%	89.7%
International	58.1%	28.6%	28.9%	0.5%	85.7%	-11.3%	-11.7%	0.4%	85.7%
Africa	1.8%	25.6%	27.4%	-1.0%	73.9%	-11.7%	-13.4%	1.4%	73.9%
Asia Pacific	8.9%	105.6%	96.2%	3.9%	84.5%	-26.1%	-27.9%	2.0%	84.5%
Europe	26.5%	13.8%	13.6%	0.1%	87.0%	-8.3%	-6.1%	-2.0%	87.0%
Latin America	2.8%	25.3%	21.2%	2.9%	89.1%	-1.9%	-5.8%	3.5%	89.1%
Middle East	9.4%	22.6%	22.1%	0.3%	82.6%	-4.2%	-5.7%	1.3%	82.6%
North America	8.7%	17.7%	17.2%	0.3%	90.3%	2.1%	-0.6%	2.4%	90.3%
Domestic	41.9%	21.5%	16.7%	3.3%	84.5%	8.3%	10.4%	-1.7%	84.5%
Dom. Australia ⁴	1.0%	3.5%	8.5%	-4.1%	83.2%	-3.1%	-3.1%	0.0%	83.2%
Domestic Brazil ⁴	1.5%	3.6%	-0.1%	3.0%	83.4%	4.5%	6.2%	-1.3%	83.4%
Dom. China P.R. ⁴	6.4%	71.9%	49.1%	10.5%	79.2%	22.5%	31.3%	-5.7%	79.2%
Domestic India ⁴	2.0%	21.1%	13.3%	5.3%	83.3%	0.7%	4.7%	-3.3%	83.3%
Domestic Japan ⁴	1.2%	13.4%	1.3%	7.8%	72.7%	0.0%	-1.2%	0.9%	72.7%
Domestic US ⁴	18.2%	11.1%	9.5%	1.3%	89.2%	3.0%	3.1%	-0.1%	89.2%

¹% of industry RPKs in 2022

²Change in load factor

³Load factor level

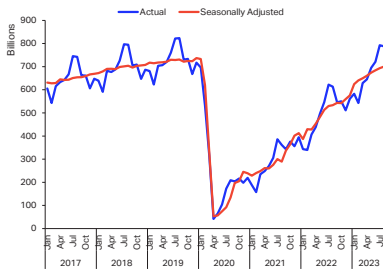
⁴Note: the six domestic passenger markets for which broken-down data are available account for approximately 31.3% of global total RPKs and 74.6% of total domestic RPKs

Note: The total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic.



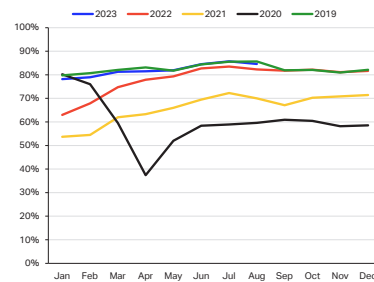
AUG 2023: Air Passenger Market Analysis

Chart 1 – Global air passengers, revenue-passenger kilometers (RPKs), billions per month



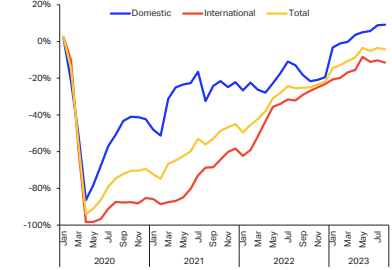
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 2 – Industry-wide passenger load factors, % share of available seat-kilometers (ASKs)



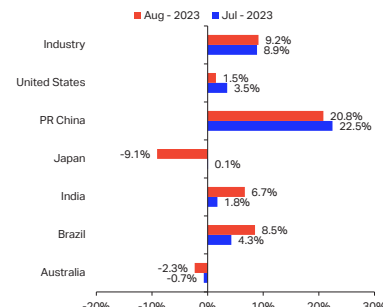
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 3 – Global domestic and international revenue passenger-kilometers (RPKs), YoY% change vs. 2019



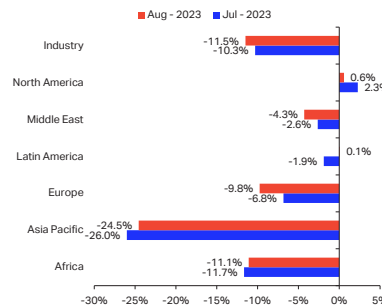
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 4 – Domestic RPK growth by market, YoY% change vs. 2019



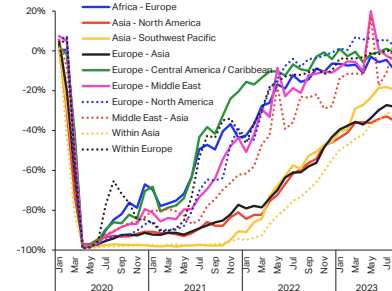
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 5 – International RPK growth by airline region of registration, YoY% change versus 2019



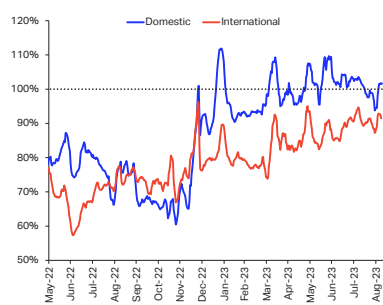
Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 6 – International RPKs, YoY% change vs. 2019 – Top 10 route areas in 2019



Sources: IATA Sustainability and Economics, IATA Monthly Statistics

Chart 7 – Ticket sales by purchase date, 7-day moving average - % share of 2019 levels



Sources: IATA Sustainability and Economics, DDS

Air passenger market in detail - August 2023

	World share ¹	August 2023 (% year-on-year)				August 2023 (% ch vs the same month in 2019)			
		RPK	ASK	PLF (%-pt) ²	PLF (level) ³	RPK	ASK	PLF (%-pt) ²	PLF (level) ³
TOTAL MARKET	100.0%	28.4%	24.8%	2.3%	84.6%	-4.3%	-3.1%	-1.1%	84.6%
Africa	2.1%	24.8%	24.3%	0.3%	76.4%	-8.3%	-9.3%	0.8%	76.4%
Asia Pacific	22.1%	73.4%	57.7%	7.4%	82.2%	-7.1%	-5.1%	-1.8%	82.2%
Europe	30.8%	11.6%	10.2%	1.1%	87.6%	-6.6%	-5.6%	-1.4%	87.6%
Latin America	6.4%	17.6%	14.5%	2.2%	85.1%	6.9%	4.1%	1.8%	85.1%
Middle East	9.9%	26.4%	21.6%	3.2%	83.0%	-3.7%	-4.8%	1.0%	83.0%
North America	28.8%	12.6%	13.0%	-0.3%	85.8%	0.9%	2.5%	-1.4%	85.8%
International	58.1%	30.4%	27.5%	1.9%	85.4%	-11.5%	-11.2%	-0.3%	85.4%
Africa	1.8%	26.1%	25.5%	0.4%	76.2%	-11.1%	-11.8%	0.6%	76.2%
Asia Pacific	8.9%	98.5%	85.5%	5.5%	84.2%	-24.5%	-25.8%	1.4%	84.2%
Europe	26.5%	13.6%	12.3%	1.1%	86.8%	-9.8%	-7.3%	-2.3%	86.8%
Latin America	2.9%	26.4%	23.8%	1.7%	86.1%	0.1%	-2.4%	2.2%	86.1%
Middle East	9.4%	27.3%	22.7%	3.0%	83.1%	-4.3%	-5.1%	0.7%	83.1%
North America	8.7%	18.6%	17.5%	0.8%	87.7%	0.6%	1.3%	-0.6%	87.7%
Domestic	41.9%	25.4%	21.1%	2.9%	83.5%	9.2%	12.1%	-2.2%	83.5%
Dom. Australia ⁴	1.0%	6.6%	10.7%	-3.2%	82.3%	-2.3%	-2.7%	0.3%	82.3%
Domestic Brazil ⁴	1.5%	7.8%	5.4%	1.8%	83.1%	8.5%	7.8%	0.6%	83.1%
Dom. China P.R. ⁴	6.4%	93.6%	66.2%	11.2%	79.1%	20.8%	33.9%	-8.5%	79.1%
Domestic India ⁴	2.0%	23.2%	15.6%	5.1%	83.9%	6.7%	8.5%	-1.4%	83.9%
Domestic Japan ⁴	1.2%	8.7%	12.0%	-0.8%	82.5%	-9.1%	-10.5%	1.3%	82.5%
Domestic US ⁴	19.2%	9.6%	11.2%	-1.2%	84.4%	1.5%	4.2%	-2.2%	84.4%

¹% of industry RPKs in 2022

²Change in load factor

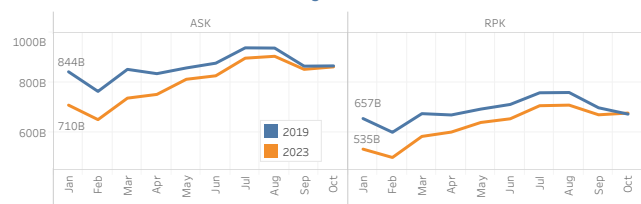
³Load factor level

⁴Note: The six domestic passenger markets for which broken-down data are available account for approximately 31.3% of global total RPKs and 74.6% of total domestic RPKs.

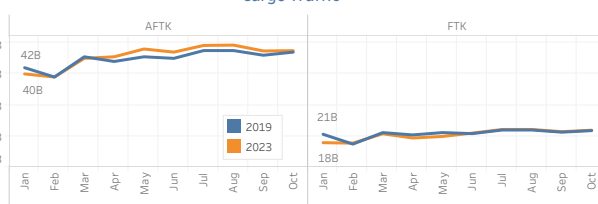
Note: The total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic.

Type	ASK	RPK	Departure_Total	Departure_All Cargo	FTK	Active fleet_PAX	Active fleet_All Cargo
July 2023 vs. July 2019	▼-4.4%	▼-6.8%	▼-7.7%	▼-11.6%	▲0.8%	▼-6.6%	▼-5.4%
Jan - Jul 2023 vs. Jan - Jul 2019	▼-9.7%	▼-11.4%	▼-10.6%	▼-7.8%	▼-3.2%	▼-8.6%	▼-0.6%

Passenger Traffic



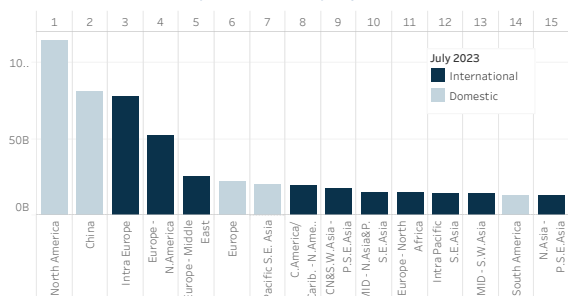
Cargo Traffic



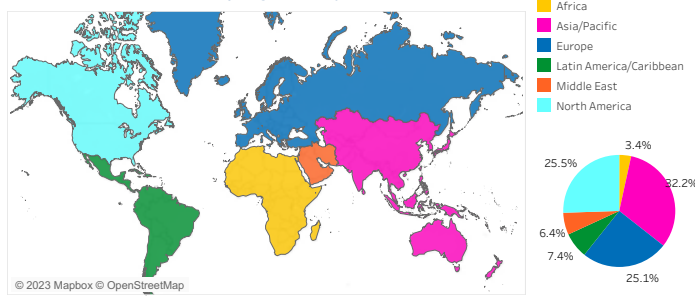
Change rate (% MoM)

Indicator...	Year..	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
AFTK	2019	-7.1%	16.7%	-3.3%	3.4%	-1.1%	5.6%	0.0%	-3.2%	2.2%
	2023	-2.5%	15.4%	1.1%	5.5%	-2.1%	4.6%	0.2%	-3.8%	0.2%
ASK	2019	-9.3%	11.5%	-2.0%	2.7%	2.2%	7.0%	-0.1%	-7.7%	0.1%
	2023	-8.1%	13.2%	2.0%	8.0%	1.7%	8.5%	0.8%	-5.8%	1.2%
FTK	2019	-15.3%	21.1%	-3.5%	3.6%	-1.5%	5.6%	0.0%	-3.2%	2.4%
	2023	-0.8%	16.9%	-6.5%	2.5%	5.4%	5.6%	0.0%	-3.2%	2.2%
RPK	2019	-8.4%	12.4%	-0.8%	3.5%	2.7%	6.5%	0.1%	-8.0%	-3.6%
	2023	-6.2%	16.8%	3.0%	6.4%	2.3%	8.0%	0.3%	-5.4%	1.0%

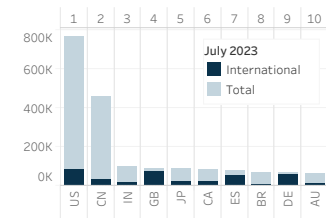
Top 15 Route Groups by RPK



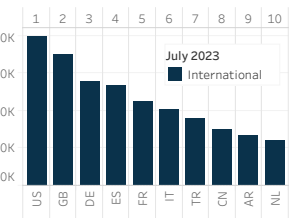
Total RPK by Region of Departure



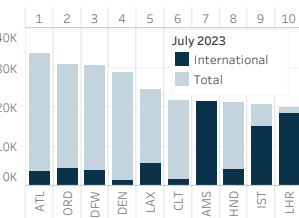
Top 10 Countries by Departure (Total)



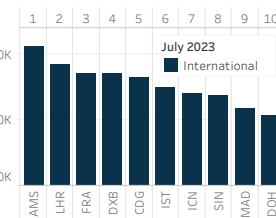
Top 10 Countries by Departure (INT)



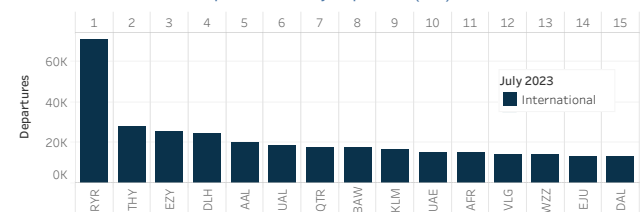
Top 10 Airports by Departure (Total)



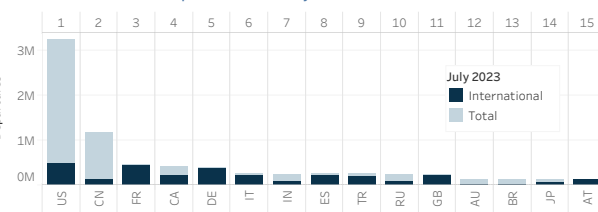
Top 10 Airports by Departure (INT)



Top 15 Airlines by Departure (INT)



Top 15 Countries by FIR Movement



Others

RPK and FTK data are estimated using AI and machine learning algorithm for June to October.

Actual RPK and FTK data will replace the estimate after a lag of 2 months.

For further information and customization needs, contact the Aviation Data and Analysis section at ada@icao.int

(*) Used codes:

- Country code: ISO 3166-1 alpha-2

- Airline code: ICAO airline code, ICAO Doc 8585



ICAO

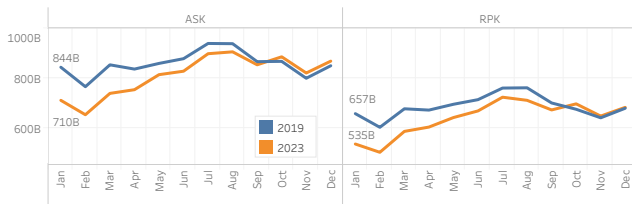
ECONOMIC DEVELOPMENT

OCT 2023: Air Transport Monthly Monitor

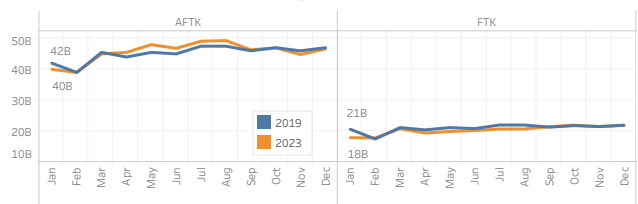
World Results and Analyses. Total scheduled services
(Domestic and international)

Type	ASK	RPK	Departure_Total	Departure_All Cargo	FTK	Active fleet_PAX	Active fleet_All Cargo
Sep 2023 vs. Sep 2019	▼-1.5%	▼-4.0%	▼-7.0%	▼-7.4%	▲0.8%	▼-5.6%	▼-1.6%
Jan - Sep 2023 vs. Jan - Sep 2019	▼-8.0%	▼-9.6%	▼-9.8%	▼-7.4%	▼-4.3%	▼-8.0%	▼-0.5%

Passenger Traffic



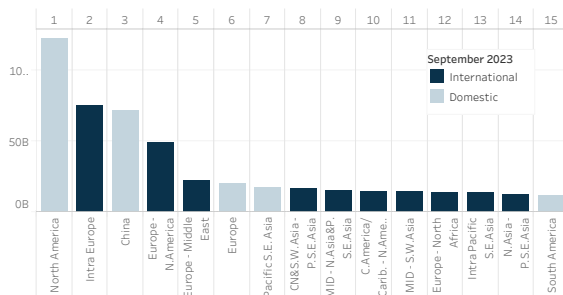
Cargo Traffic



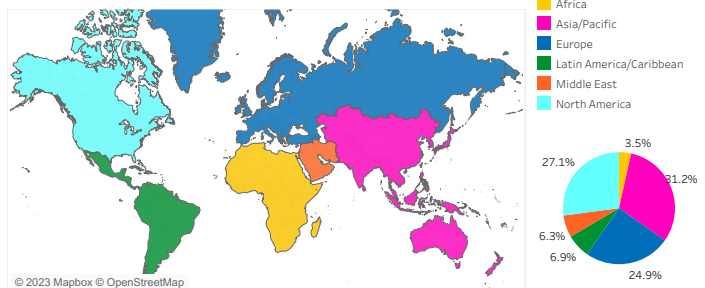
Change rate (% MoM)

Indicator	Year	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
AFTK	2019	-7.1%	16.7%	-3.3%	3.4%	-1.1%	5.6%	0.0%	-3.2%	2.2%	-2.1%	2.2%
	2023	-2.5%	15.4%	1.1%	5.5%	-2.5%	4.9%	0.4%	-6.0%	1.4%	-4.6%	4.0%
ASK	2019	-9.3%	11.5%	-2.0%	2.7%	2.2%	7.0%	-0.1%	-7.7%	0.1%	-7.8%	6.3%
	2023	-8.1%	13.2%	2.0%	8.0%	1.7%	8.5%	0.8%	-5.8%	3.8%	-7.4%	5.8%
FTK	2019	-15.3%	21.1%	-3.5%	3.6%	-1.5%	5.6%	0.0%	-3.2%	2.4%	-1.4%	1.9%
	2023	-0.6%	16.9%	-6.7%	2.6%	1.5%	2.5%	0.0%	-3.7%	2.2%	-2.1%	2.2%
RPK	2019	-8.4%	12.4%	-0.8%	3.5%	2.7%	6.5%	0.1%	-8.0%	-3.6%	-5.1%	6.0%
	2023	-6.2%	16.8%	3.0%	6.4%	4.2%	8.3%	-1.7%	-5.4%	3.6%	-7.1%	5.4%

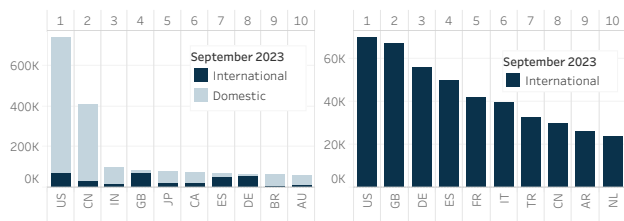
Top 15 Route Groups by RPK



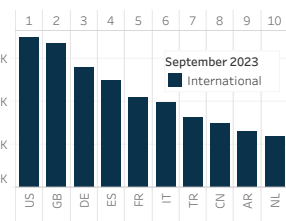
Total RPK by Region of Departure



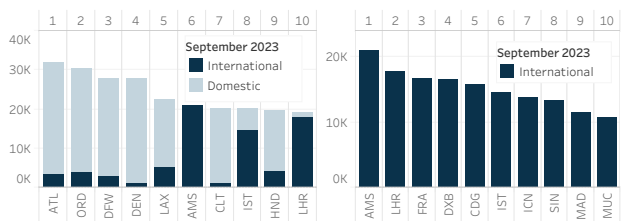
Top 10 Countries by Departure (Total)



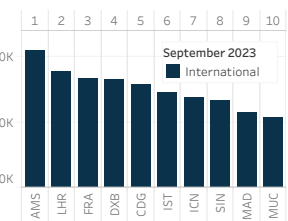
Top 10 Countries by Departure (INT)



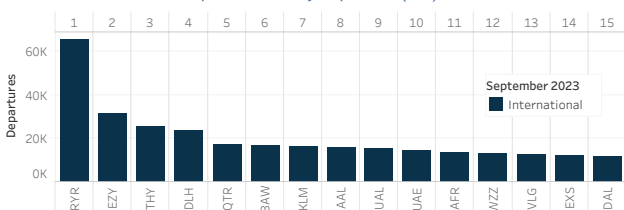
Top 10 Airports by Departure (Total)



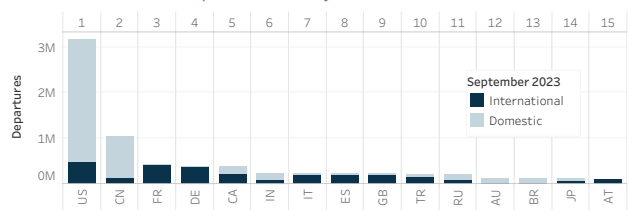
Top 10 Airports by Departure (INT)



Top 15 Airlines by Departure (INT)



Top 15 Countries by FIR Movement



Others

- RPK and FTK data are estimated using AI and machine learning algorithm for August to December.
- Actual RPK and FTK data will replace the estimate after a lag of 2 months.
- Route groups are defined by the ICAO Aviation Data and Analysis Panel (ADAP) and used for the ICAO Long-Term Traffic Forecasts (40 international and 10 domestic route groups).
- For further information and customization needs, contact the Aviation Data and Analysis section at ada@icao.int

(*) Used codes:

- Country code: ISO 3166-1 alpha-2

Worldwide Traffic Results Industry outlook for 2023–2024

Passenger traffic/Freight volumes (Summary)

Table 1: The impact of the COVID-19 crisis on quarterly passenger traffic by region, compared to the 2019 level (2020–2024, rounded to the nearest million passengers)

Region	Q1	Q2	Q3	Q4	TOTAL	Q1	Q2	Q3	Q4	TOTAL
2019						2019				
Africa	52	55	64	58	229	-	-	-	-	-
Asia-Pacific	837	824	860	866	3,376	-	-	-	-	-
Europe	477	650	752	550	2,428	-	-	-	-	-
Latin America-Caribbean	172	164	176	175	687	-	-	-	-	-
Middle East	97	100	111	99	407	-	-	-	-	-
North America	461	527	535	504	2,027	-	-	-	-	-
World	2,097	2,319	2,498	2,241	9,155	-	-	-	-	-
Estimated under COVID-19*						Compared to 2019 (%)				
2020						2020				
Africa	46	1.4	11	20	78	87.6%	2.6%	16.8%	34.2%	33.9%
Asia-Pacific	587	175	353	411	1,526	70.1%	21.2%	41.0%	48.0%	45.2%
Europe	387	26	219	123	755	81.2%	4.0%	29.1%	22.4%	31.1%
Latin America-Caribbean	155	10	37	77	280	89.7%	6.1%	21.3%	44.2%	40.7%
Middle East	88	3.4	16	26	131	88.4%	3.4%	14.1%	26.4%	32.2%
North America	387	60	156	183	785	83.9%	11.3%	29.2%	36.2%	38.7%
World	1,647	275	792	840	3,554	78.6%	11.9%	31.7%	37.5%	38.8%
2021						2021				
Africa	21	23	34	38	116	39.4%	42.3%	52.1%	66.4%	50.5%
Asia-Pacific	358	402	333	417	1,511	42.8%	48.8%	38.8%	48.7%	44.7%
Europe	95	172	434	359	1,061	19.9%	26.5%	57.7%	65.4%	43.7%
Latin America-Caribbean	81	88	122	145	435	46.9%	53.6%	69.2%	82.7%	63.4%
Middle East	29	31	47	63	169	30.1%	30.7%	42.0%	63.6%	41.6%
North America	193	338	405	410	1,346	41.8%	64.1%	75.7%	81.5%	66.4%
World	776	1,054	1,375	1,433	4,638	37.0%	45.5%	55.0%	63.9%	50.7%
2022						2022				
Africa	36	42	52	50	179	68.3%	76.5%	80.6%	86.2%	78.3%
Asia-Pacific	343	397	507	517	1,764	40.9%	48.1%	59.0%	60.4%	52.2%
Europe	293	523	640	469	1,925	61.6%	80.5%	85.1%	85.2%	79.3%
Latin America-Caribbean	144	152	169	174	639	83.7%	92.7%	96.3%	99.3%	93.0%
Middle East	64	77	96	93	331	66.0%	77.7%	86.3%	94.4%	81.3%
North America	369	475	491	472	1,806	79.9%	90.0%	91.8%	93.6%	88.1%
World	1,249	1,666	1,956	1,775	6,645	59.6%	71.8%	78.3%	79.2%	72.6%
2023						2023				
Africa	47	52	64	58	221	90.6%	94.6%	98.8%	100.4%	96.3%
Asia-Pacific	667	735	763	783	2,948	79.7%	89.3%	88.7%	91.4%	87.3%
Europe	433	623	727	536	2,318	90.8%	95.9%	96.6%	97.4%	96.5%
Latin America-Caribbean	173	166	186	183	707	100.3%	101.0%	106.9%	104.3%	102.9%
Middle East	94	96	107	97	394	96.2%	96.2%	96.4%	98.6%	96.8%
North America	469	522	531	511	2,023	99.6%	99.0%	99.2%	101.4%	99.8%
World	1,873	2,194	2,377	2,167	8,612	89.3%	94.6%	95.2%	96.7%	94.1%
2024						2024				
Africa	57	60	72	64	253	109.7%	110.2%	112.0%	110.2%	110.6%
Asia-Pacific	797	822	870	872	3,361	95.2%	99.7%	101.2%	101.9%	99.5%
Europe	475	658	772	557	2,463	99.7%	101.3%	102.6%	101.4%	101.4%
Latin America-Caribbean	190	181	196	192	759	110.5%	110.2%	111.6%	109.5%	110.6%
Middle East	101	104	119	104	429	103.7%	104.9%	106.9%	105.8%	105.4%
North America	478	547	556	523	2,103	103.5%	103.6%	104.0%	103.8%	103.7%
World	2,099	2,372	2,585	2,312	9,368	100.1%	102.3%	103.5%	103.2%	102.3%

* Estimated passenger traffic volumes are based on a broad range of inputs provided by ACI Regional offices and industry experts.

Source: ACI World

In 2023, global passenger traffic is projected to reach 94% of the 2019 level. The baseline projections for global passenger traffic indicate that the industry will recover to 2019 levels by 2024.

► CONTINUED FROM PAGE 55



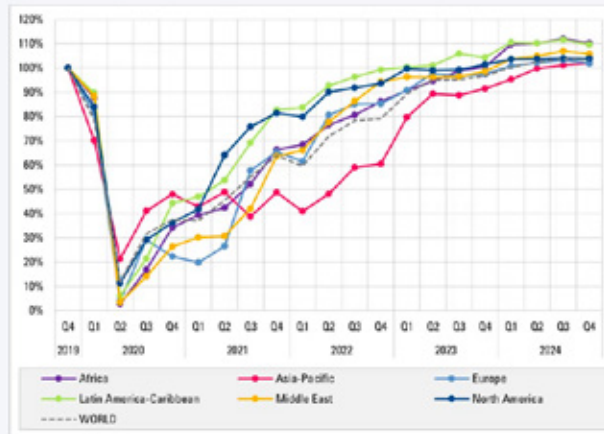
Worldwide Traffic Results

Industry outlook for 2023–2024

Passenger traffic/Freight volumes

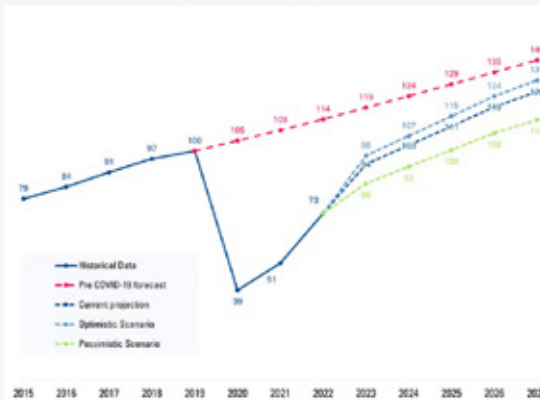
(Summary)

Chart 1: Projected global quarterly passenger traffic compared to the 2019 level (2020–2024, quarterly indexed, 2019 level = 100%)



Source: ACI World

Chart 2: Medium-term global passenger traffic projection (indexed, 2019 = 100)



* Estimated passenger traffic volumes are based on a broad range of inputs provided by ACI Regional offices and industry experts.

** The projected baseline (pre-COVID-19) scenario is based on a standard time-series forecast generated using the most up-to-date and complete historical data to May 2020. It also makes use of adjusted World Airport Traffic Forecasts (WATF) 2019–2040 and considers the latest insights provided by ACI Regional offices and other inputs.

Source: ACI World

The gap between the Business as Usual (BAU) forecast from 2019 and the current recovery projections for total passenger traffic is shown in Chart 3. The percentage of lost traffic continues to decrease on a quarterly basis, from -23% in Q1 2023 to -13% in Q4 2024.

Chart 3: Global passenger traffic – estimated losses and recovery (in billion passengers)

