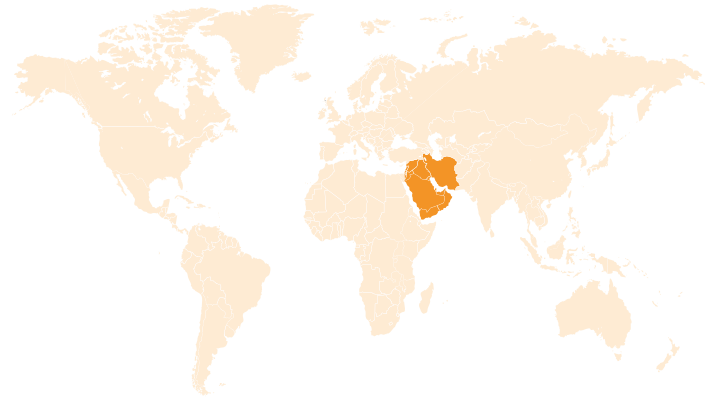


Middle East¹³³

Air transport supports two million jobs and \$116 billion in GDP in the Middle East



144 million

passengers

1,240,000

flights

207 billion

RPKs

131

commercial airports

64

airlines

1,062

aircraft in service

14

air navigation service providers

The air transport industry in the Middle East directly generated an estimated 356,000 jobs in 2012.

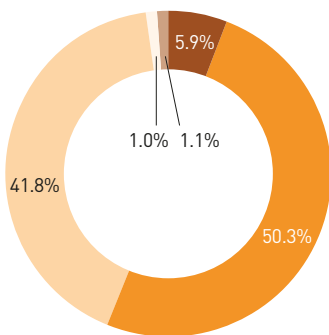
- » 149,000 of those people (42% of the total) were in jobs for airlines or handling agents (for example, flight crew, check-in staff, maintenance crew, reservations and head office staff).
- » Another 21,000 people (6% of the total) worked for airport operators (for example, in airport management, maintenance, security and operations).
- » 179,000 jobs (50%) were on-site in airports, at retail outlets, restaurants, hotels, etc.
- » A further 3,600 people (1%) were employed in the manufacture of civil

aircraft (including systems, components, airframes and engines).

- » Air navigation service providers employed an additional 3,800 people (1%).

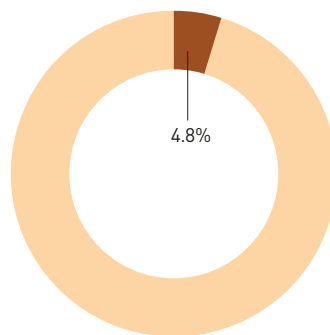
The total impacts – including those from the operations of the air transport sector itself, the impact of the air transport sector’s procurement of inputs of goods and services from its supply chain, and the impact of employees of the air transport sector and its supply chain spending their wages – mean the air transport sector supported 938,000 jobs (1.4% of economy-wide employment) and contributed \$66.8 billion to GDP in the Middle East (2.6% of economy-wide GDP).

Direct jobs generated by air transport in the Middle East, 2012



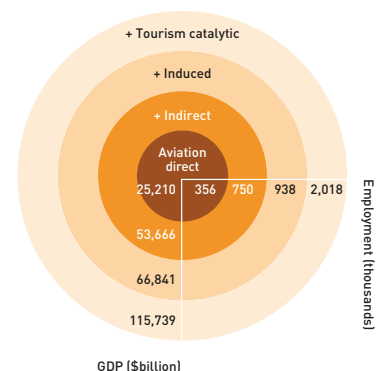
■ Airports
■ Other on-airport
■ Airlines
■ Aerospace
■ Air traffic Management

Middle East share of global passenger traffic, 2012



■ Middle East
■ Rest of the World

Total jobs and GDP generated by air transport in the Middle East, 2012



GDP (\$billion)

Employment (thousands)



In addition, travel and tourism supported 1.1 million people in employment and contributed \$48.9 billion to GDP in the Middle East's economies.

Worldwide, including the tourism impacts, the Middle East accounts for 3% of the jobs and 4.5% of the GDP supported by the air transport industry.

Air travel forecasts suggest that these benefits will grow significantly in future. Over the next 20 years, revenue passenger kilometres are expected to grow at an average annual rate of 6.3% in the Middle East. This expansion in air travel is likely to generate significant economic impacts. Oxford Economics forecasts that the number of jobs supported by aviation and tourism impacts will grow to 4.4 million by 2032, a

117% increase from 2012. Meanwhile, the contribution to GDP is forecast to grow to \$341 billion by 2032, a near tripling of the 2012 figure.

Supporting such a growth in demand for air transport services and maintaining the region's hub status will require a material level of investment in infrastructure. In addition to the necessary 'physical' investment, the region's current slow rate of market liberalisation and uncoordinated regional competition for passengers are barriers to continued success. Appropriate regulatory reform that promotes regional competition will help to spur future growth and should help to generate significant efficiency gains.

JOBS



UAE becomes a centre for aviation skills training

Hanan Jawad has wanted to be a pilot since she was 14 and is now a Boeing 777 first officer with Emirates, one of two UAE national female first officers who have gone through the Emirates pilot cadetship programme. Her career path is clear, she wants to become a captain on the Boeing 777, and sees flying as her lifelong career. She is not alone. At the beginning of 2014, there were five women in the cadet programme and the airline planned for a further 100 places to be opened to student pilots in 2015.

To meet the demand for new air services, Emirates, like most other major global airlines, is investing heavily in skills and professional training for both locally recruited employees and staff who have joined the airline from other parts of the world.

As part of its long-term strategy to nurture talent in Dubai, the Emirates Aviation College was established, offering an extensive range of aviation-related courses and programmes for both Emirates employees and the general public. The airline is planning a new flight training academy, based at Dubai World Central Airport, which will train up to 400 students at a time. Over the next few years, 40,000 pilots are required in the Middle East alone. The airline invests in learning and development for its employees and also has focused retention strategies; 47% of the 56,000 staff have been with the Emirates Group for more than five years and over 11,000 staff have been with the company for ten years or longer.