

# MIDDLE EAST<sup>184</sup>

**Air transport supports 2.4 million jobs and \$130 billion in Middle East economic activity.**

That is 3.3% of all employment and 4.4% of all GDP in Middle Eastern countries in 2016.

Every person directly employed in the aviation sector and in tourism made possible by aviation supported another 4.3 jobs elsewhere in the Middle East. Similarly, \$3.90 of economic activity was supported elsewhere in the Middle East for every \$1 of gross value added directly created by the air transport sector.

The aviation sector in the Middle East directly employed an estimated 553,700 people in 2016. A sub-sectoral analysis of these workers suggests that:

- › **192,900 (35% of the total) were employed by airlines or handling agents** as, for example, flight crew, check-in staff, maintenance crew, or head office staff;
- › **24,800 (5%) had jobs with airport operators** in, for example, airport management, maintenance, and security;
- › **326,700 (58%) worked on-site in airports** at, for example, retail outlets, restaurants, and hotels;
- › **4,400 (1%) were employed in the manufacture of civil aircraft** (including systems, components, airframes, and engines); and
- › **4,900 (1%) worked for air navigation service providers** in, for example, air traffic control and engineering.

Airlines, airport operators, retailers and other on-site businesses at airports and air navigation service providers and civil aircraft manufacturers also contribute to GDP in the Middle East. In 2016, the operations of these businesses directly generated a \$32.9 billion contribution to GDP.

The aviation sector's spending with suppliers is estimated to have supported a further 389,500 jobs and a \$20.9 billion gross value added contribution to GDP. In addition, wage payments to staff – by the aviation sector and businesses in the aviation sector's supply chain – supported 183,400 more jobs and a \$9.8 billion gross value added contribution to GDP.

The aviation sector also facilitates a substantial amount of tourism in the Middle East. This stimulates still more economic activity, as tourists spend their money with restaurants, hotels, retailers, tour operators, and other providers of consumer goods and services. In 2016, spending by foreign visitors who flew to Middle Eastern countries supported an estimated 1.3 million jobs and a \$66.1 billion contribution to GDP.

In total, accounting for the sector's direct impact, its supply chain impact, its wage expenditure impact, and the impact of tourism made possible by air transport, the aviation sector supported an estimated 2.4 million jobs and a \$130 billion contribution to GDP in the Middle East in 2016.

Air travel in the Middle East is expected to continue to grow at about 5.8% per year over the next two decades. This increase will, in turn, drive growth in the economic output and jobs that are supported by the air transport industry over the next 20 years. Oxford Economics forecasts that by 2036 the impact of air transport and the tourism it facilitates in Middle Eastern countries will have grown to support 4.3 million jobs (78% more than in 2016) and a \$345 billion contribution to GDP (a 166% increase).

The Middle East continues to consolidate its position as a hub region connecting the European and Asia-Pacific markets.

Airlines from this region are some of the most ambitious in the world, with the likes of Emirates, Etihad and Qatar boasting modern fleets. However, significant investment is required in infrastructure, as is political commitment to market liberalisation. The Middle East is home to some of the world's largest hub airports, but with traffic expected to increase dramatically in the coming decades capacity, in the air and on the ground, urgently needs addressing.

According to a 2015 assessment, the average flight in the region is delayed by 29 minutes (and this could reach 59 minutes by 2025 without action) due to air traffic control capacity and staffing issues. That assessment also concludes that the benefits of investment in air traffic management could be over \$16 billion over the next ten years<sup>185</sup>.

**172 million**  
passengers

**320 billion**  
RPKs

**87**  
airlines

**14**  
air navigation service providers

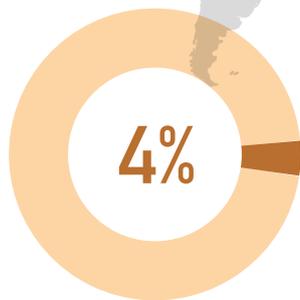
**7.2 million**  
tonnes of freight

**1,198,000**  
flights

**98**  
commercial airports

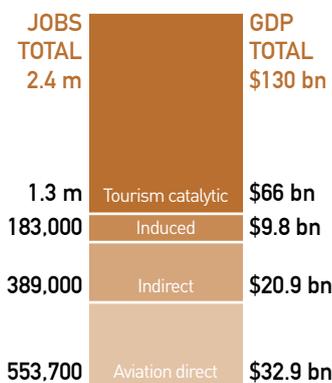
**1,466**  
aircraft in service

**75%**  
average regional load factor

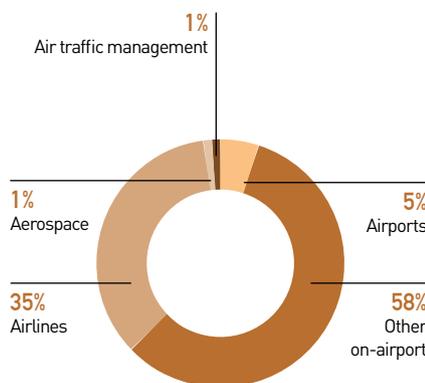


**The Middle East's share of global passenger traffic, 2017**

**Total jobs and GDP supported by air transport in the Middle East**



**Direct jobs generated by air transport in the Middle East**



**Airlines and airports join forces to combat wildlife trafficking**

The aviation industry has taken on a leadership role in the fight against wildlife trafficking.

The illegal trade of wildlife is the fourth most lucrative black market in the world – worth around \$20 billion a year and impacting more than 7,000 species of animals and plants. Criminal organisations involved in wildlife trafficking are often directly connected to other trafficking networks, including the smuggling of narcotics, arms and people, and exploit the increasing connectivity of global air transportation to traffic the endangered species. The air cargo industry is therefore one of the key aviation sectors acting to break the supply chain from source to consumer.

One of the initiatives is the United for Wildlife Transport Taskforce Buckingham Palace Declaration, which IATA, along with around 50 of its member airlines and ACI, has signed. Signatories have committed to raise awareness of wildlife trafficking among passengers, train staff to help spot trafficked species, establish a system to share information on illegal wildlife trade and improve cooperation between transport bodies and regulatory and enforcement organisations.

Airlines and airports devote resources for extensive passenger awareness campaigns to educate potential buyers of illegal wildlife products, including exhibits at Dubai, Johannesburg and Kuala Lumpur International Airports, on-board videos and feature-length articles in in-flight magazines.

Two Emirates A380s have even taken to the skies with special liveries featuring wildlife threatened by poaching and the illegal wildlife trade to communicate the need for urgent action.

Airlines are further rolling out training programmes to improve the capacity of their cargo and customer-facing staff to be on the alert for suspicious signs relating to illegal wildlife transportation and to detect and report them.

Etihad Airways developed its own online module designed to inform its employees of the business risks associated with the illegal wildlife trade and ways to prevent them. Among others, Kenya Airways, Singapore Airlines, Turkish Airlines and LAM Mozambique, together with airports, train cabin crew, ground handlers, cargo processors, and staff from regional airports to help detect and stop smugglers carrying ivory, rhino horn, and other wildlife products.