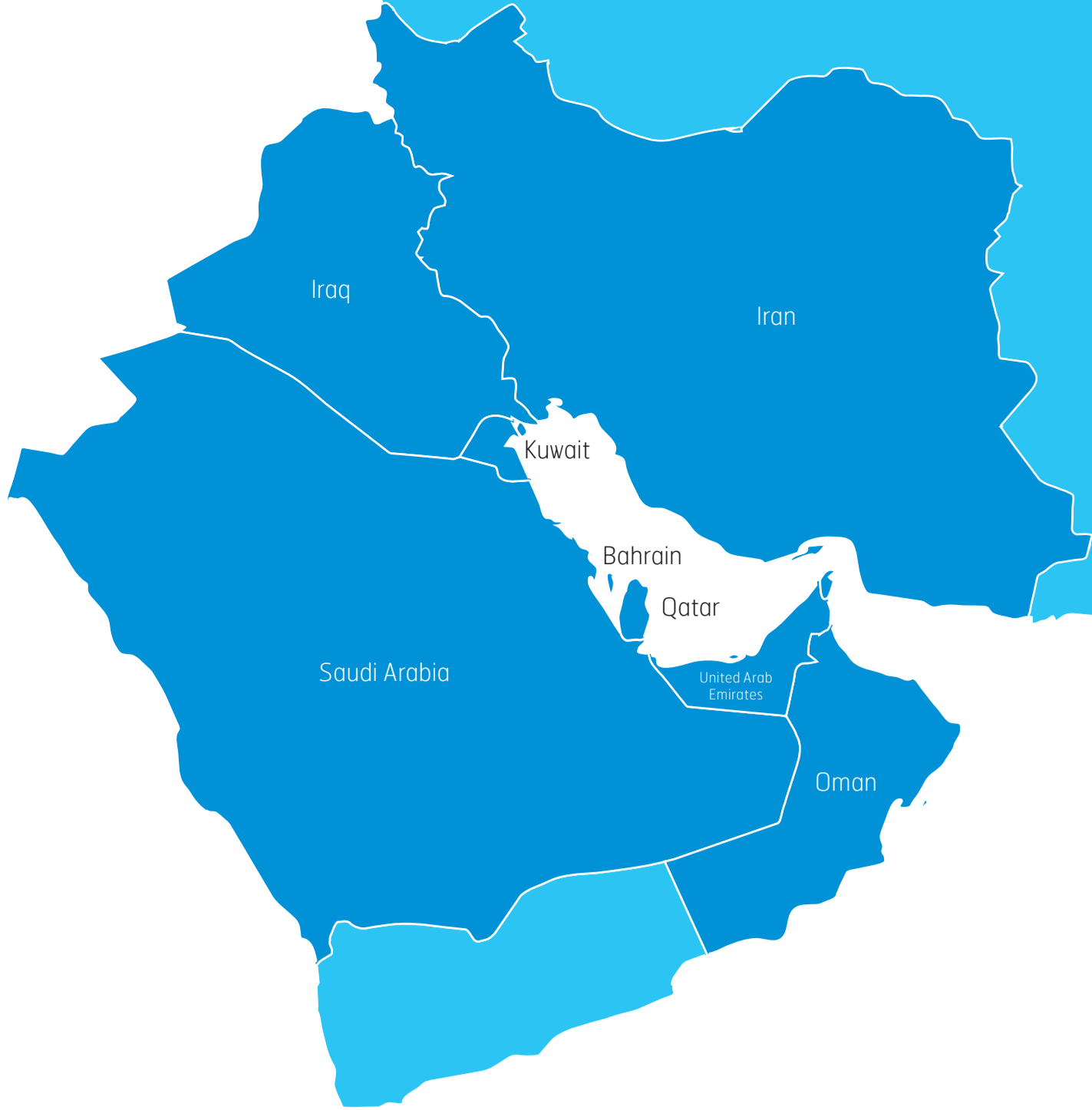


The sky's the limit: fuelling future benefits from air traffic control



Current Situation



The Middle East region carries a **5%** share of **global passenger traffic**



Dubai is the **world's busiest international airport** in terms of passenger numbers

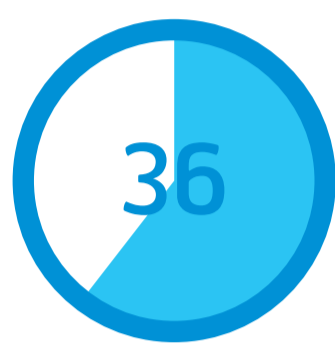


Air transport in the Middle East supports **2 million jobs** and **\$116 billion** in GDP for the region



Today's Delay

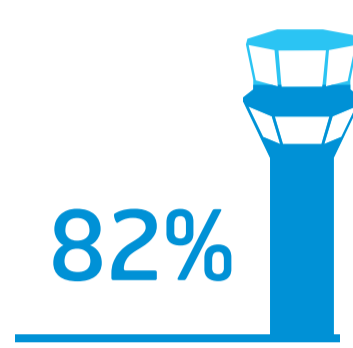
Delay minutes attributable to air traffic control is **29 minutes** in 2015



Average tactical delay per flight (minutes)



Average tactical delay per flight **attributed to ATC** (minutes)



Average delay suggested by data to be attributable to air traffic control / capacity / staffing issues



Strong Future Growth Forecast



Growth arising from the region's strategic geographic location between Europe and Asia



Increasing inbound tourism to the region. **92%** increase forecast in overnight tourism



Large airport developments across the region



New routes will be offered to customers



OAG predicts a **10%** annual growth rate for the growth of the **aviation fleet** in the Middle East



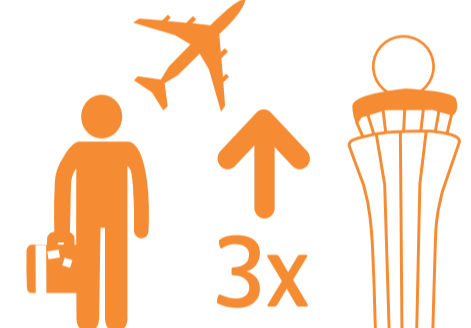
Passenger Numbers Set To **Increase...**



Dubai **47 million** in 2010 to **70 million** in 2014, a **49%** increase



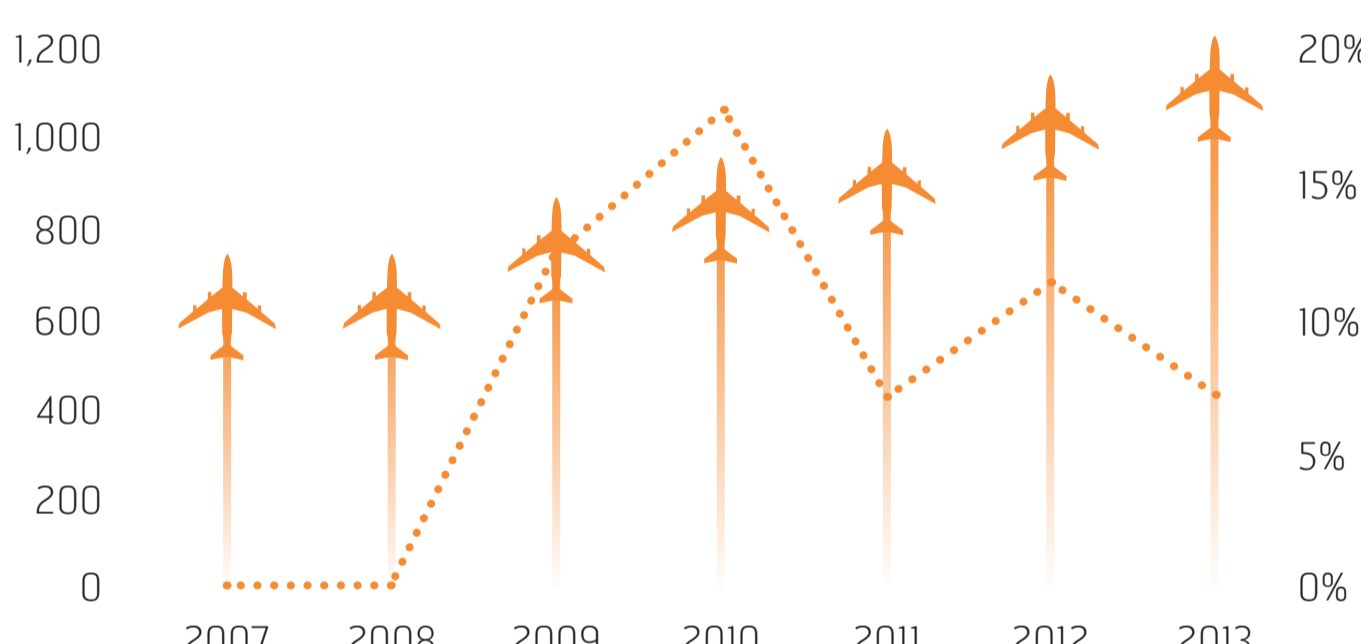
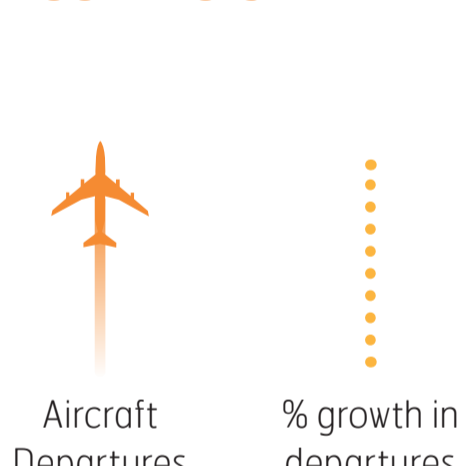
Qatar grew **166%** from **3.7 million** passengers in 2006 to **9.8 million** in 2014



Abu Dhabi Airport **16.5 million** in 2013, **more than triple** the **5.4 million** passengers recorded in 2006

...With An **Increase** In Aircraft Departures

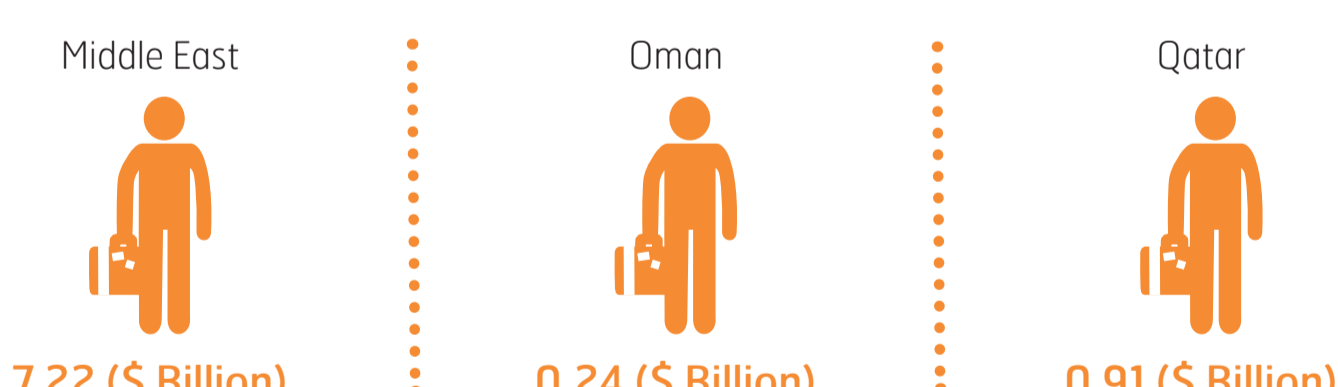
Growth in Aircraft departures from 2007- 2013



Doing Nothing May Be **Costly**

Using the current state of aviation traffic in 2015 as a baseline Air Traffic Control (ATC) net delay costs in the Middle East, Oman and Qatar from 2015-2025 **could be enormous**

ATC delay cost to passengers



ATC delay cost to airlines

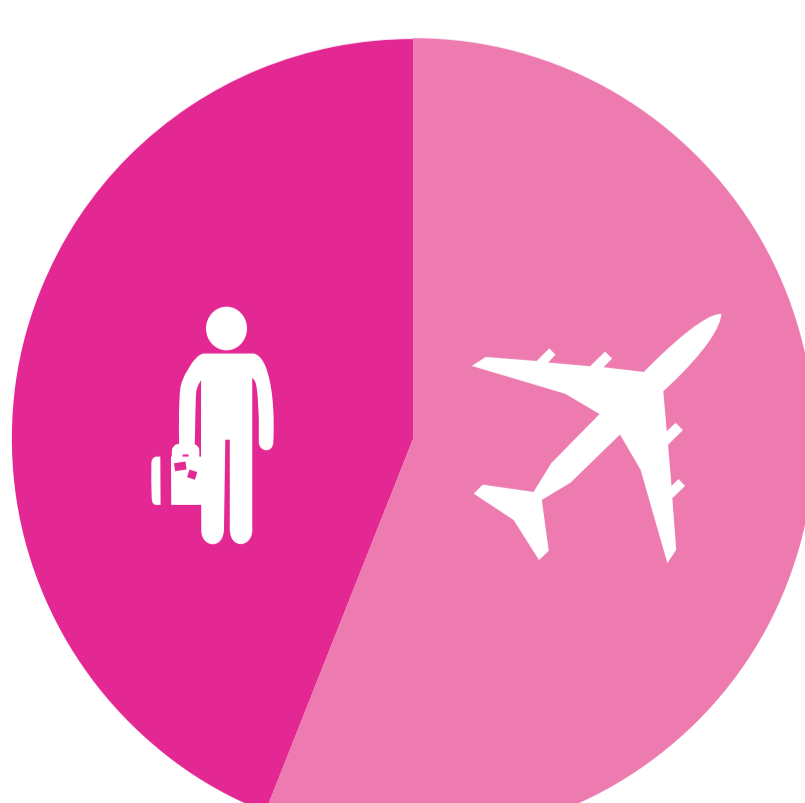


Improve Air Traffic Control; Reduce The Effects of Delay

\$16,337,000,000

The net present value of avoiding a hypothetical doubling of delay minutes by 2025

7.2
Passenger's surplus (\$ Billion)
44%



9.1
Airlines' surplus (\$ Billion)
56%

Distribution of benefits between passengers and airlines within the Middle East

