

**Special Edition:**  
**CAPA - 2020**



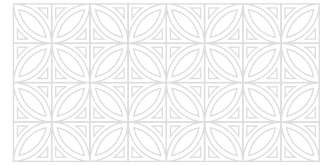
# **CAPA Qatar Aviation Aeropolitical & Regulatory Summit 2020**

More than 280 global aviation leaders and professionals convened at the two-day summit in Doha under the patronage of HE Jassim bin Saif Al Sulaiti, Minister of Transport and Communications of State of Qatar.

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# QATAR AVIATION AEROPOLITICAL AND REGULATORY SUMMIT 2020 - AGENDA



*Photo from the left: Mr. Mustafa Al Hinai, CEO Oman Aviation Group; H.E. Abdulla Nasser Turki Al-Subaey, President of the QCAA; H.E. Jassim bin Saif Al Sulaiti, Minister of Transport and Communications of State of Qatar; H.E. Akbar Al Baker, Qatar Airways, Group CEO; Mr. Willie Walsh, CEO IAG; Mr. Badr Al Meer, COO Hamad International Airport.*

This Summit gathered senior aviation decision-makers from across the public and private sector from 5-6 February 2020, to discuss the latest issues and developments regarding international aviation regulation.

Below are the critical discussions held at this years' Summit.



# KEY MESSAGE FROM QATAR AIRWAYS GROUP CEO

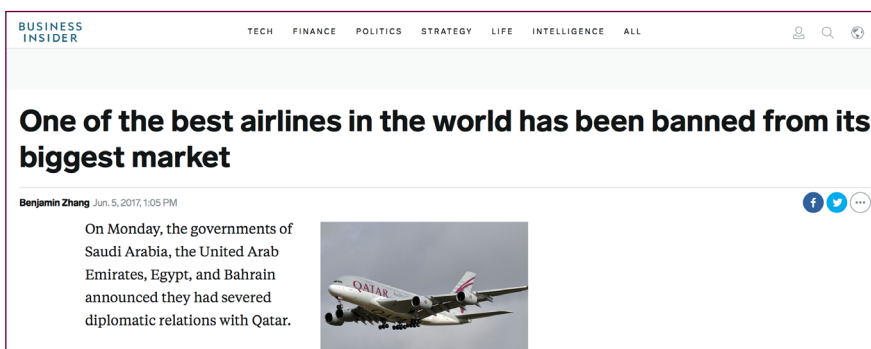


More than ever, our industry continues to show great levels of resilience in the face of adversity and disruption. The timing of this year's summit is perfect to engage in fruitful discussions and constructive debate.



The airspace blockade imposed on my country by some of our neighbours is an example of how our industry can be hijacked for political agendas.

We should continue to condemn any political actions that violate international law and jeopardize the safety and regularity of air transport.



**For Qatar Airways, these have been challenging years, but despite this adversity, our resilience is unwavering**

Despite the illegal blockade on my country, we have continued our growth and global expansion without compromising our commitment to excellence.



In 2019, we were awarded the Skytrax "World's Best Airline" prize – for a record fifth time.

In 2018-19, our drive for world-class customer service has been recognised as industry-leading by a number of prestigious awards.

**Just recently at the Kuwait Aviation Show, we announced eight new destinations that will be joining our network in 2020.**

With these new routes, our current operations will expand to over 175 destinations around the world, providing our passengers with more options and flexibility when planning their travel. Our cargo business continued its impressive growth across the globe.



# KEY MESSAGE FROM QATAR AIRWAYS GROUP CEO



**Our industry should always embrace collaboration in the face of unexpected disruptive forces**



In recent weeks, as you all know, we have been challenged by global health emergencies, volcano eruptions, and geopolitical tensions. Collaboration and coordination have been key ingredients for creating industry resilience, while preserving the highest levels of safety and security for our passengers and crew.



## China is a very important market in the aviation industry

Regarding the Novel coronavirus (COVID-2019) we have full support for them, for what they have done. Unfortunately, we had to suspend our passenger operations due to operational restrictions that were imposed by other countries, but we are continuing our cargo operations to China. We are continuing supplying the people of China with food and medical supplies, including Qatar Airways' donations to help our friends in China in this very difficult and downtime for them. China will persevere, they have done fantastic job trying to control this.

**We should work with national authorities to help them achieve their long-term policy objectives and improve the well-being of their citizens**



That is why Qatar Airways has supported the inclusion of provisions on fair competition, environment, and social issues within the legal framework of the Qatar-EU Comprehensive Air Transport Agreement.

That is also why Qatar Airways has engaged positively with U.S. authorities in recent years, and we will continue to support job creation and greater consumer choices.

We have also continued our engagements with other governments to emphasize our support to travelers, shippers, as well as the tourism and business sectors.

## On the liberalization front, it is time to move from “liberalization on paper” to “liberalization in practice”

Open skies agreements are useless if airlines are blocked on slots at airports or face other regulatory obstacles.



As you all know, outdated airport infrastructure can be a huge operational hurdle for airlines and a great source of inconvenience for passengers. That is why the State of Qatar invests in its airport infrastructure with a long-term approach that takes account projected capacity and tourism goals.



# KEY MESSAGE FROM QATAR AIRWAYS GROUP CEO



In October 2019, Hamad International Airport revealed plans for its second expansion phase.



This expansion is expected to increase the airport's capacity to more than 53 million passengers annually by 2022, and more than 70 million after 2022. This expansion is a vital part of the country's preparations to host the FIFA World Cup in 2022.

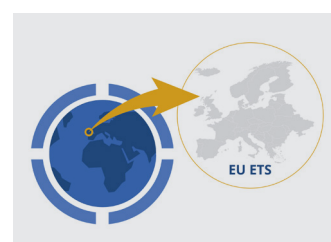
**“On the sustainability front, our industry should continue to implement environmentally-friendly practices and support innovation”**

That is why we continue investing in the world's most technologically advanced aircraft, with low levels of carbon and noise emissions.

At the level of our internal processes, we continue to measure and reduce our energy consumption and greenhouse emissions across all our operations.

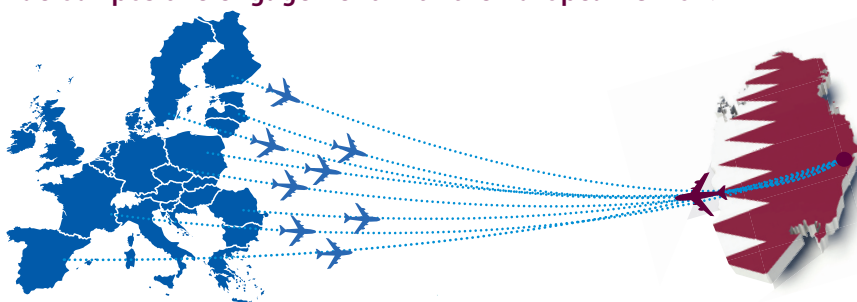
✿ We also remain compliant with the EU ETS and we have started reporting carbon emissions for the baseline year of CORSIA.

✿ I would like to provide you with a review of where Qatar Airways is moving in the next few years.



**On the aeropolitical front, we will continue our positive engagement with the European Union.**

The European Commission has been a reliable partner in reaching a balanced legal framework for the landmark Qatar-EU Comprehensive Air Transport Agreement which was announced during the CAPA Summit last year.

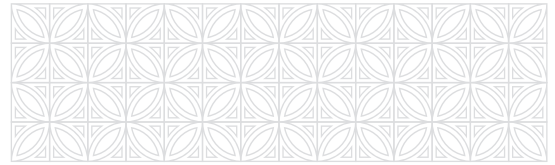


**We will continue our engagement with various African partners to support and promote the realization of Africa's aviation potential.**

On the investment and partnerships front, we will continue to adopt a bold commercial approach based on diversification and value creation. That is why our commercial agreements with partner airlines around the world are built to produce a balance of benefits and create more convenience to our passengers and shippers.



# KEY MESSAGE FROM QATAR AIRWAYS GROUP CEO



Finally, we will continue to support Qatar's national vision for human and economic development.



Qatar Airways Group is proud to contribute towards the Qatar National Vision to “transform Qatar into an advanced society capable of achieving sustainable development” by 2030.

In recent years, my country has been implementing concrete measures to protect all expatriates and continues to work on a complete reform of our labour legislation as recently announced by the office of the ILO in Qatar.



Qatar Airways is deeply committed to combatting modern slavery by identifying the risks related to human trafficking in our employment practices and our supply chain.

We are working closely with the Qatar National Tourism Council to promote the tourism sector and the enhancement of visitors' experience.



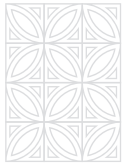
Ultimately, we want to ensure that Qatar becomes a global tourism destination and a well-recognized leader in the organization of leisure, sporting and business events.

One of my core beliefs is that a liberalized aviation sector can be a great catalyst for global economic and human development.

**At Qatar Airways, we believe in connecting people...with no borders...only horizons.**

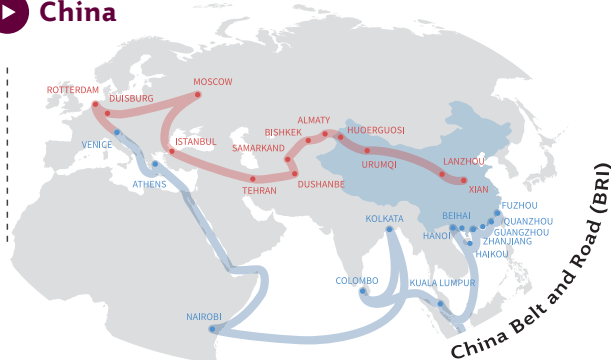


# HIGHLIGHTS FROM CAPA CHAIRMAN EMERITUS: OPEN SKIES AND LEVEL PLAYING FIELDS



## “ (Re)Shaping the international aviation regulatory system in the 2020s

### ► China



- China will come to dominate 2020-2050.
- China's strategy is more explicitly directed to global trade influence, incorporating wider national goals.
- Chinese airlines and policies increasingly dominate aviation in East Asian market.
- China Belt and Road (BRI) is the foundation for global trade and aviation expansion.

### ► Europe

- European Union will remain highly influential.
- Airline consolidations, strengthening incumbents will make new entry difficult.
- More EU inter-region international multilateral agreements to come.
- Withdrawal of the United Kingdom is likely to dilute the EU's liberalizing influence.
- Environmental responsibility will dictate new policies, probably not favorable to aviation.



### ► United States

#### Delta Air Lines Completes LATAM Acquisition

Delta Air Lines has completed its purchase of a 20% stake in LATAM, wrapping up one of the surprise aviation deals of 2019. LATAM is a member of Oneworld and a bedfellow with Delta's arch-rival, American Airlines. But this deal has turned those cozy relationships on their heads.

- United States still remains a highly competitive, as new long haul narrow bodies enter the market.
- Latin America will continue as a key region for global trade and strategic dominance.

### ► External Forces



Sustainability and global warming: Impact on consumer behavior, Governments environmental taxes and policies.

Public health control: Global pandemics.

Oil prices: Have an effect on competition.

Aircraft technologies: Next generation of fuel-efficient narrow bodies will have a large impact.



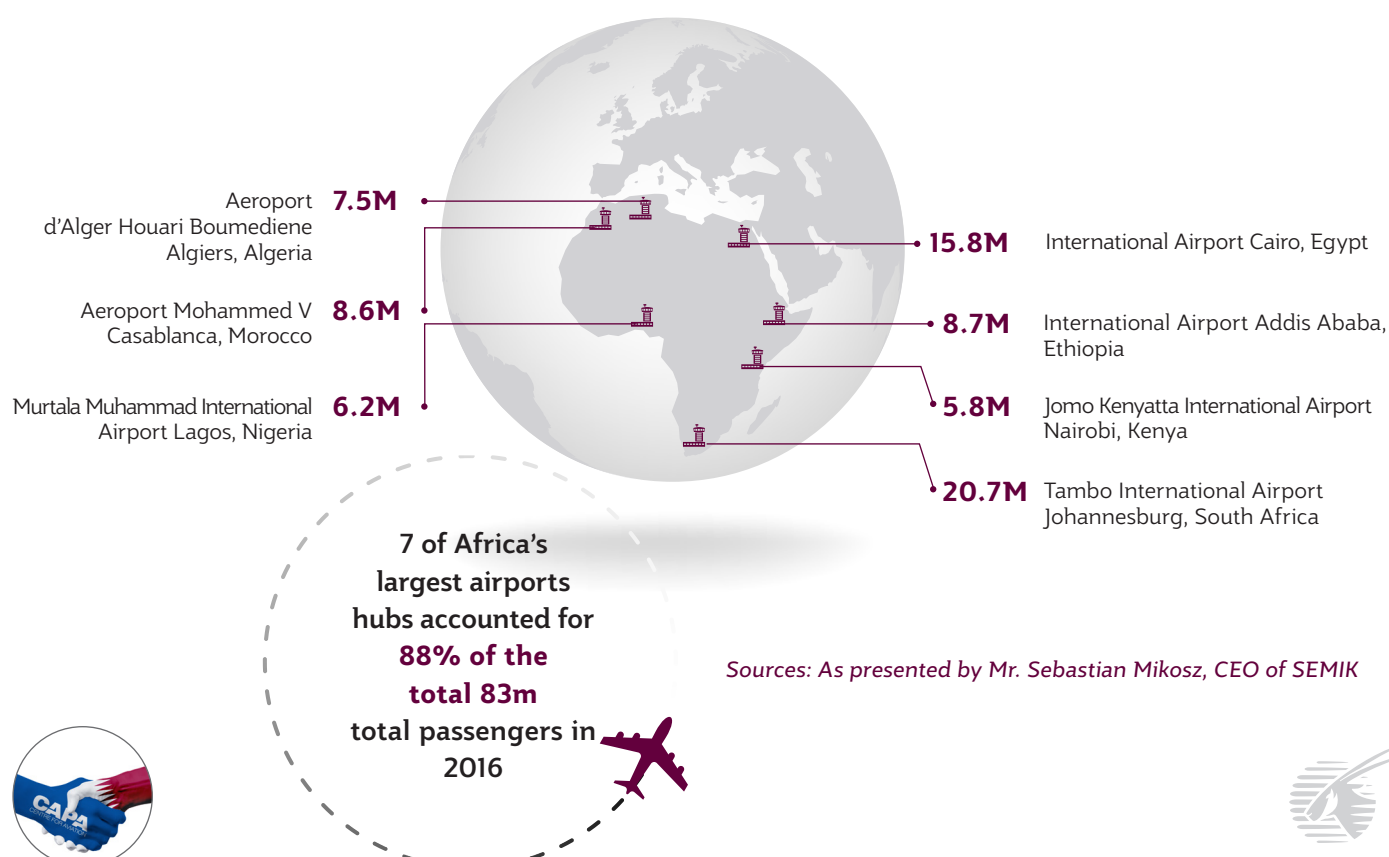
# PANEL #1: AVIATION ACCESS ACROSS AFRICA AND THE MIDDLE EAST



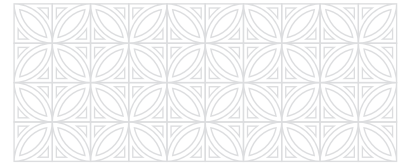
The Summit addressed how aviation has the potential to make an important contribution to economic growth and development within Africa, by opening and connecting markets, facilitating trade and enabling African manufacturer and producers to link into global supply chains.

- Passenger traffic growth of African carriers has been volatile and consistently lower than the world average growth;
- Top 10 States in Africa accounted for the majority of the international passenger traffic carried by African carriers;
- Top international destination region from Africa is to Europe (41%), followed by Intra-Africa (27%) and the Middle East (19%);
- Currently in Africa, 19 States have no international airlines, 22 States have only 1 international airline, and 4 States have more than 3 international airlines.

## Passenger distribution across major African hubs - 2016



## PANEL #2: EUROPEAN UNION POLICIES AND AVIATION APPROACH



Over the last 30 years, the European Union has created the world's largest and most successful example of regional market integration and liberalisation in air transport.

EU aviation market has been developed through changes in the economic and regulatory landscape of air transport in Europe

Creation of the single EU aviation market has also had implications for the EU's external aviation relations, leading to the development of the EU's external aviation policy.

Mandate adopted by the European Council on 07 June 2016, which allows the European Commission to start negotiations on comprehensive EU-level air transport agreements with key partners: including Qatar, considering its dynamic and fastest growing aviation market.

European Commission representative provided an update on EU global agreements in the major regions of the world, highlighting the agreements reached with the United States, Canada, Morocco, Jordan, Tunisia, among other countries. During the discussion, the European Commission representatives confirmed that all agreements are directed at allowing market development and growth based on common rules and transparency. Moreover, the European Commission was pleased to announce the developments on its negotiations with the Sultanate of Oman, after their mandate on 20 September 2018 to negotiate an EU aviation comprehensive agreement.

In the panel it was highlighted that the conclusion of the negotiations between the State of Qatar and the European Commission on a Comprehensive Air Transport Agreement on 06 February 2019, once signed, will provide a significant competitive edge to air carriers of both parties and a sustainable framework for future operations.



**Abdul Wahab Teffaha,**  
Secretary General, AACO

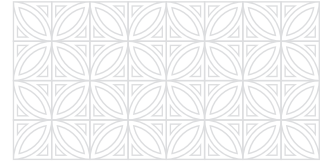
The secretary General of Arab Air Carriers' Organization (AACO) was able to provide a view on the EU-Arab air transport relations and the challenges mutually faced by both regions such as growing air traffic, sustainability and maintaining safety and security in this very dynamic sector.

### BREXIT

The conference highlighted the challenges to EU liberalized approach post BREXIT as while the Commission measures cover direct flights, looking to ensure that point-to-point flights UK to Europe (and vice versa) will be allowed to continue pending implementation of new permanent arrangements.



# SUSTAINABILITY GOALS FOR AVIATION



The development of affordable alternative fuels and the elimination of single-use plastics are among a long list of promising initiatives that can make a real difference. Our industry's commitment to a more sustainable environment for future generations may involve participating in carbon offsetting projects.

**H.E. Akbar Al Baker**  
Qatar Airways, Group CEO

That is why we continue investing in the world's most technologically advanced aircraft, with low levels of carbon and noise emissions.



At the level of our internal processes, we continue to measure and reduce our energy consumption and greenhouse emissions across all our operations.



We continue to invest great resources the implementation of our wildlife protection program.



We also remain compliant with the EU ETS and we have started reporting carbon emissions for the baseline year of CORSIA.



Airlines have to be able to demonstrate that offsetting is a credible process"

**Willie Walsh**, CEO IAG



The aviation industry must find a way to finance sustainable fuels, and to convince governments to help us with sustainable biofuel development efforts. Sustainable biofuels could contribute up to 80% of our carbon emissions reduction goals."

**Alexandre de Juniac**, IATA DG and CEO



Aviation needs to be sustainable, there is no other choice"

**Carlos Bermejo Acosta**,  
Head of Unit for Aviation Agreements, European Commission



Aviation industry has come a long way in terms of the development and use of sustainable biofuels. We expects to see a significant increase in the use of sustainable biofuels by airlines over the next five years."

**Michael Gill**, Executive Director, Air Transport Action Group (ATAG)



# DOHA DECLARATION 2020



Travel and tourism, within a liberal regulatory framework, are essential for global connectivity and socio- economic development. 20% of all new jobs is created in this industry.

However, in the face of climate change, it is essential for the industry to engage collectively to reduce the level of emissions.

The aviation and tourism industries recognize there are no single “one-size-fits-all” solutions to the environmental challenges the world is confronted by today.

To secure environmental sustainability for future generations, it is recommended that urgent action should be taken by:

## 1. Airlines

- To work actively with manufacturers and fuel suppliers to explore all avenues for emission reduction, including but not limited to using and developing alternative fuels, and ensuring efficient operational processes.
- To promote a clear and coherent industry message to assure the public that effective measures are being taken.
- To cooperate with and encourage airports to play an active and integral role in improving operational efficiencies.

## 2. Governments (unilaterally and multilaterally)

- To consult actively with industry to complement industry action while minimizing the regulatory temptation to impose additional taxes in the form of charges and fees.
- Whenever taxes are imposed, these should be transparently allocated to activities that will serve to reduce the industry’s impact on the environment.
- To achieve reduction in carbon emissions by improving the effectiveness of air traffic management. Urgent steps should be made in every jurisdiction to achieve rapid improvements in that direction.

## 3. Other stakeholders

- Travellers should be provided with clear, reputable, and globally-acceptable means of off-setting their carbon footprint.
- Leading education institutions together with the aviation industry should work to define and develop appropriate data and skills – both technical and non-technical – with the ultimate goal to support the development of a strong and effective cohort of aviation environment professionals, and promote equal accessibility to leadership positions.



# NO BORDERS, ONLY HORIZONS



On 5 June 2017, Qatar Airways ceased being just a commercial airline and overnight became the only humanitarian bridge connecting the State of Qatar to the world.

Qatar's only land bridge and lifeline was shut down without warning leaving approximately 3.2 million residents without access to new shipments of food, medicines, and other critical supplies. Qatar Airways quickly mobilised to provide the humanitarian care required of its international residents while continuing to deliver our five-star customer service, for which we are renowned.

“

As an airline, we do not believe in boundaries. We believe in bringing people together. The world is better that way.

We believe it is a right of all of us to go where we need to go, to feel the things we want to feel, to see the people we want to see.

That is why we will continue to fly the skies, providing our passengers with everything we can and treating everyone how they deserve to be treated.

We do this because we know that travel goes beyond borders and prejudice...

**That travel teaches compassion.**

**That travel is a necessity.**

**That travel is a right for all.**

**There should be no borders in the sky, only horizons.**

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