



A Competitive Sustainable
Aviation

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الإستراتيجية 2040 الوطنية للطيران

NATIONAL AVIATION STRATEGY



The National Aviation Strategy 2040 provides a comprehensive national framework guiding the development of Oman's aviation sector in alignment with the objectives of Oman Vision 2040. It reinforces the sector's role as a promising contributor to the national economy and as a driver of integration across related industries.

In a world experiencing rapid transformations in transport patterns and a growing reliance on aviation as a global economic engine, there is a clear need for a national vision that redefines the role of the aviation sector and directs its growth in line with international trends and national ambitions. Building on the objectives of Oman Vision 2040, the National Aviation Strategy 2040 establishes an integrated framework to advance the sector, enhance its economic contribution, and support its long-term competitiveness and sustainability.

The strategy focuses on transforming aviation from a means of transport into a fully integrated economic and development ecosystem. It supports tourism, logistics, and investment, contributes to income diversification, strengthens air connectivity, improves service quality, and enhances operational efficiency all while upholding the highest standards of safety, security, and environmental sustainability.

This publication introduces the vision, strategic directions, and implementation phases of the National Aviation Strategy 2040, highlighting its role in enabling aviation to become a key enabler for achieving Oman Vision 2040 and establishing Oman as a regional and global aviation hub, connected to the world and prepared for the future.

Message from the President of CAA



H.E. Eng. Naif bin Ali Al Abri

Over recent years, the civil aviation sector in the Sultanate of Oman has witnessed rapid development in its core infrastructure, including airports, air navigation facilities, and meteorological services.

This has been complemented by enhancements in operational services, strengthened aviation safety and security systems, and improved sector readiness to keep pace with digital transformation and advanced technologies. These developments reflect Oman's commitment to international standards and its role as a trusted partner in the global aviation industry.

In this context, the Civil Aviation Authority highly values the support of the esteemed Council of Ministers for the aviation sector and its approval of the National Aviation Strategy 2040.

This strategy serves as a comprehensive roadmap for the future of civil aviation in Oman, translating the government's commitment to developing the sector and reinforcing its pivotal role in the national economy.

The strategy was meticulously developed and fully aligned with the directions and priorities of Oman Vision 2040 to ensure that the sector's objectives harmonize with national pathways and achieve the desired developmental impact.

This was accomplished through a broad participatory and integrative methodology, in collaboration with all aviation sector partners and in close coordination with relevant government entities.

The approach reflects the conviction that the integration of roles is fundamental to the sector's success. The strategy is relied upon to enhance aviation's contribution to supporting and enabling various economic sectors, foremost among them tourism and logistics.

Additionally, the strategy focuses on maximizing the potential of air cargo, recognizing its role as a vital economic contributor and supporter of supply chains and logistics services. Salalah Airport stands at the forefront of airports with promising opportunities in this field, as the Authority, in collaboration with its partners, works to attract and strengthen the presence of specialized cargo carriers.

Muscat International Airport has also experienced significant growth in air cargo activity in recent years, with promising future prospects for expansion and development. The strategy further anticipates future opportunities for Duqm and Sohar airports by integrating their roles with nearby ports, enhancing multimodal connectivity, and supporting Oman's ambition to establish itself as a leading regional hub in aviation and logistics services.



Pillars of the National Aviation Strategy

First:

Airports and Infrastructure



This pillar focuses on developing airports to deliver an outstanding experience for aviation users through appropriate infrastructure, high-quality services, and efficient and sustainable operations.

3 Strategic Programs:

Operational Optimization Program

Enhancing airport operational efficiency and service levels through the application of effective operating and development models that maximize the utilization of available infrastructure.

Commercial Development Program

Enhancing the attractiveness and competitiveness of airports by developing commercial products and services, incentivizing airlines, and supporting the growth of passenger and cargo markets.

Airports' Network Activation and Sustainability Program

Ensuring the sustainable operation of the airport network while integrating environmental sustainability principles into services and operational processes.

Vision of the National Aviation Strategy

Thrust the Omani Civil Aviation sector to new horizons, catalysing the Sultanate of Oman's sustainable growth.

Strategic Direction 2040

By 2040, the civil aviation sector is expected to achieve ambitious growth indicators, most notably:

3.5%+

Contribution to GDP

1+

OMR billion
in cumulative
private sector
investments

1≈

Million tons of
air cargo

40+

Million
passengers

Sustainability

Human Capital

Governance

Innovation

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Core Principles of
the Strategy

Economic

Commercial

Policies and Regulation

Operational

Security and Safety

Second:

Air Transport



This pillar aims to strengthen Oman's domestic and international connectivity through a competitive and efficient air transport network that supports economic growth and serves various sectors.

3 Strategic Programs:

National Capacity Uplift Program

Maximizing national air transport capabilities in both passenger and cargo segments and enhancing the Sultanate's competitiveness in regional and international markets.

Air Transport Incentives Program

Enhancing domestic and international air connectivity through incentive tools that support the sustainability of air routes and services.

Airlines Environmental Sustainability Program

Achieving environmental compliance and promoting the adoption of innovative solutions in air transport, in line with international standards and commitments.



Third:

Aviation Services



This pillar focuses on excellence in aviation services, developing the aviation value chain, adopting modern technologies, and enhancing private-sector participation.

3 Strategic Programs:

Airspace Management Program

Improving the efficiency of Omani airspace management and maximizing its capacity to support safe and efficient air traffic movement.

Support Services Development Program

Enhancing aviation support services and improving their operational efficiency.

Advanced Air Mobility Program

Integrating advanced air mobility technologies, including unmanned aircraft, into Oman's aviation ecosystem in a safe and economically viable manner.

Sector Enablers

Sector enablers support the growth and development of the aviation sector by strengthening national competencies, developing legislation, improving governance, and enhancing service quality.

6 Strategic Programs:

Human Capital Development Program

Aviation Safety and Security Program

Economic Regulations Program

Service Quality & Global Recognition Program

Private Sector Attraction Program

Governance and Sector Alignment



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Strategy Implementation Roadmap

The roadmap for implementing the initiatives of the National Aviation Strategy 2040 spans 15 years and is divided into three phases:

Phase One: Ignition and Engines Run-up Phase (2026-2027)

17 Initiatives covering regulatory frameworks, legislation, governance models, and urgent operational initiatives, most notably:

- Adapt MCT's operations and infrastructure to new passengers' demand pattern.
- Boosting passenger air connectivity at Muscat and Salalah airports.
- Introduce catering and line maintenance services across Tier1/2 airports.
- Develop heavy maintenance capabilities in Oman.
- Refurbish economic policies and regulations.
- Instil continuous aviation safety improvement.
- Instil continuous aviation security improvement.

Phase Two: Acceleration and Takeoff Lift-off (2027–2030)

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Initiatives covering commercial growth, value-chain expansion, and investment attraction, most notably:

- Establish a Public Service Obligation (PSO) scheme to connect Tier 2/3 airports.
- Ensure CORSIA compliance with minimized implementation risks.
- Establish sector readiness for innovative aviation fuels (SAF, LCAF, Hydrogen).
- Declare and optimize Oman Air Space capacity.
- Establish a regulatory framework for Advanced Air Mobility.
- Establish nation-wide UTM platform.
- AAM sandbox and activation.
- Optimize the investors' journey across aviation activities.

Phase Three: Sky-high (2030–2040)

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Initiatives implemented in parallel with ongoing initiatives from previous phases, aimed at maximizing commercial growth, increasing capacity, and adopting advanced technologies in the aviation sector, most notably:

- Modular expansion of airport infrastructure and capacity (2/2).
- Build-up Space Traffic Management capabilities to enable space rocket launching.
- Optimize private aviation service portfolio (2/2).

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Preparation Phase

An Integrated Participatory Approach

■ Participatory Preparation (Methodology)

- A five-step methodology, ranging from growth opportunity analysis and assessment of the current situation to the formulation of the roadmap and governance framework.
- Review of more than 130 documents and files contributed by stakeholders.

■ Participating Entities (More than 60 National Institutions)

Three main categories:

Within the Sector (Intra-sector)

Includes the Civil Aviation Authority, national carriers (Oman Air, SalamAir), airports, and service providers such as Transom and the Oman Aviation Academy, among others.

Across Other Sectors (Inter-sector)

Includes sovereign and service ministries such as the Ministry of Defence, Ministry of Interior, Ministry of Finance, Ministry of Economy, Ministry of Transport, Communications and Information Technology, Ministry of Heritage and Tourism, and the Royal Oman Police, in addition to entities such as the Oman Investment Authority, ASYAD Group, Omran Group, and others.

Public Category

Targets the general public, media outlets, students, and academics to ensure societal alignment with the objectives of the vision.

■ Meetings and Workshops

- Six months of intensive consultations.
- More than 70 specialized meetings and workshops.
- Expanded forums, focus groups, and technical sessions.

■ Alignment with Oman Vision 2040

- Alignment with the Vision's targets.
- Integration with tourism, logistics, urban development, and environmental strategies.



Alignment with
Oman Vision 2040



Vision Pillars

How does the National Aviation Strategy 2040 enable Oman's economy to take flight toward the future



Oman Vision 2040 represents the comprehensive national framework upon which the Sultanate relies to address challenges and keep pace with global changes.

The Vision constitutes the primary reference from which the National Aviation Strategy 2040 was launched to ensure:

- Effective economic management.
- A diversified and sustainable economy.

The strategy was developed by the Civil Aviation Authority to serve as:

- One of the key enablers for achieving national priorities.
- A tool to transform the aviation sector from a mode of air transport into an economic engine.
- A catalyst for growth, investment, and development.

First: Economic Diversification and Enhancement of Non-Oil Revenues

Oman Vision 2040 places income diversification at the core of its direction, aiming to:

- Reduce reliance on oil.
- Increase the contribution of promising sectors to GDP.

The aviation sector emerges as one of the sectors capable of generating tangible economic impact through:

- Increasing the sector's contribution to the national economy by 2040.
- Attracting high-quality private-sector investments.
- Improving the business environment.
- Enhancing the Sultanate of Oman's global competitiveness.

Second: Advancing leadership in the Tourism and Logistics Sectors

The National Aviation Strategy is closely linked to:

- The Tourism Strategy.
- The Logistics Strategy.

The aviation sector is a key enabler of tourism growth through:

- Strengthening direct air connectivity.
- Facilitating access to global markets.

The aviation sector represents the backbone of the logistics ecosystem through:

- Supporting air cargo movement.
- Enabling trade.

These integrated roles contribute to:

- Consolidating Oman's position as a regional hub for tourism and logistics flows.

Third: The Omani Citizen at the Heart of Development

Oman Vision 2040 affirms that an empowered Omani citizen is the foundation of sustainable development.

The National Aviation Strategy prioritizes the development of national competencies through:

- Creating direct and indirect employment opportunities in the aviation sector.
- Implementing targeted capacity-building programs.
- Qualifying national cadres capable of leading the future of aviation.

This approach aims to:

- Ensure sector sustainability.
- Enhance long-term competitiveness.

Fourth: Environmental Sustainability and Innovation

The National Aviation Strategy aligns with national directions toward:

- Environmental sustainability.
- Net-zero carbon neutrality.

The strategy adopts environmental sustainability principles across all air transport activities.

It also focuses on innovation and digital transformation, including:

- Improving operational efficiency.
- Enhancing user experience.
- Creating an attractive environment for investment in advanced technologies.

Linking Strategy Pillars to Oman Vision 2040 Priorities

Strategic pillars and sector enablers are directly linked to Oman Vision 2040 priorities.

The pillars were designed to serve as the primary drivers and enablers for achieving national targets.

They aim to translate priorities into tangible operational and economic outcomes.



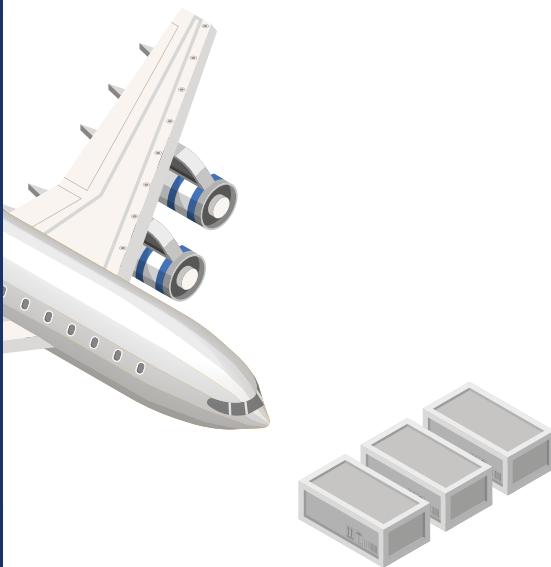
First: Air Transport Pillar

Linkage to Economic Diversification and Financial Sustainability:

- Enhancing direct air connectivity.
- Opening new markets.
- Enabling vital sectors such as tourism and logistics.
- Increasing the aviation sector's contribution to GDP by 2040.

Linkage to Environment and Natural Resources Priority:

- Supporting national environmental sustainability objectives.
- Adopting sustainable aviation fuel initiatives and compliance measures.
- Complying with international emissions reduction mechanisms.
- Aligning with net-zero carbon targets for 2050.



Second: Airports and Infrastructure Pillar

Linkage to Regional Development and Sustainable Cities

- Developing regional airports.
- Integrating them with public service systems.
- Stimulating economic activity.
- Improving domestic connectivity.

Linkage to Private Sector, Investment, and International Cooperation

- Creating an attractive investment environment in airports and infrastructure.
- Improving operating models.
- Enhancing private-sector participation.
- Strengthening Oman's competitiveness as a regional aviation hub.

Third: Aviation Services Pillar

Linkage to Education, Learning, and National Capabilities

- Adopting advanced technologies (advanced air mobility, air traffic management).
- Supporting innovation and scientific research.
- Building national capabilities in advanced aviation domains.

Job Creation

- Providing direct and indirect employment opportunities.
- Supporting national employment targets.
- Developing aviation services, technical services, and aviation-related advanced technologies.

Fourth: Sector Enablers

Labor Market and Employment Priority

Human Capital Enabler:

- Developing and implementing a national human capital development plan.
- Building qualified national talent.
- Increasing localization rates within the aviation sector.

Governance of the State Administrative Apparatus, Resources, and Projects

Governance and Policy Enabler:

- Adopting a clear and integrated governance model.
- Enhancing transparency and accountability.
- Improving decision-making efficiency.

Economic Governance of the State Administrative Apparatus

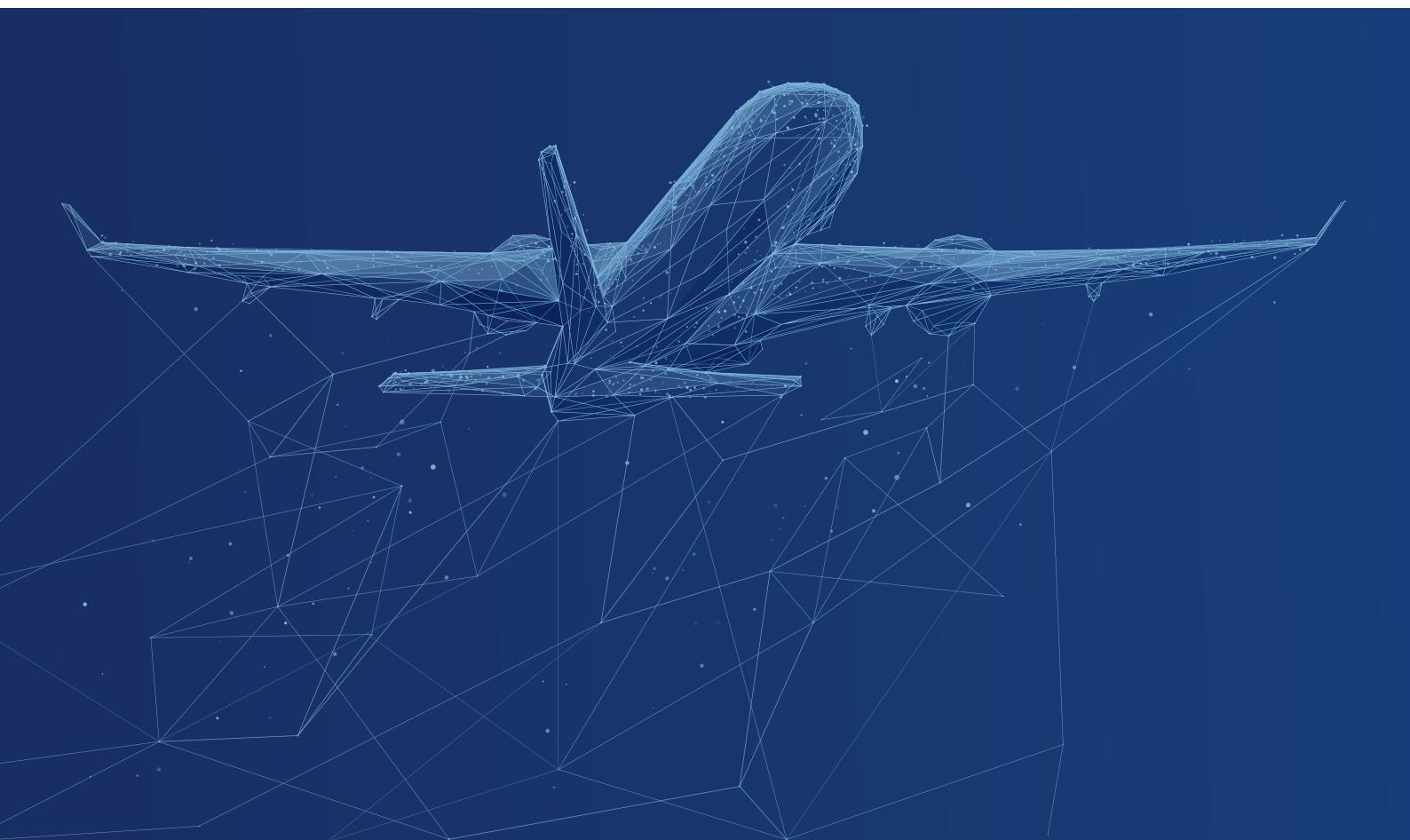
Economic Legislation Enabler:

- Developing and updating regulatory frameworks and economic legislation.
- Improving the business environment.
- Enhancing competitiveness.
- Attracting local and foreign investments.

Conclusion

The National Aviation Strategy 2040 is more than a sector development plan; it is an integrated ecosystem that translates the ambitions of Oman Vision 2040 into tangible operational and economic outcomes. Built on a clear governance framework, the strategy ensures effective coordination among stakeholders and strengthens the Sultanate of Oman's position as a regional and global aviation hub.

Serving as the executive instrument of the Vision, the strategy transforms strategic priorities into measurable results, positioning aviation as a key driver of a diversified and sustainable economy. It represents the "wings" that connect Oman to the world, while Oman Vision 2040 serves as the solid runway the national economy to take off toward a more competitive and sustainable future.





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