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HH Sheikh Khalifa bin Zayed Al Nahyan
President of the United Arab Emirates

HH General Sheikh Mohamed bin Zayed Al Nahyan
Crown Prince of Abu Dhabi and Deputy Supreme Commander of the Armed Forces of the UAE
ETIHAD AIRWAYS
BOARD OF DIRECTORS

HH Sheikh Hamed bin Zayed Al Nahyan (Chairman)
HH Sheikh Khaled bin Zayed Al Nahyan (Vice Chairman)
HE Mohammed Mubarak Fadel Al Mazrouei
HE Ahmed Ali Al Sayegh
HE Mubarak Hamad Al Muhairi
HE Hamad Abdullah Al Shamsi
HE Khalifa Sultan Al Suwaidi
ETIHAD AIRWAYS ANNUAL REPORT 2013

FROM THE PRESIDENT & CHIEF EXECUTIVE OFFICER

Ethihad Airways experienced a milestone year in 2013. Not only did we celebrate our tenth anniversary, we also achieved our third consecutive net profit, up 48 per cent to US$62 million, underpinned by record passenger numbers, freight volumes and revenues.

We increased our global presence, introducing six new destinations for passenger services: Washington DC, Amsterdam, São Paulo, Belgrade, Ho Chi Minh City and Sana’a. We added flights on 18 other routes and established our first round-the-world air cargo operation. We increased our partnerships in the air and on the ground. And we continued to attract international attention, winning almost 20 awards in 2013 including, for the fifth consecutive year, the title of “World’s Leading Airline” in the prestigious World Travel Awards, and “Airline of the Year” in the Global Traveler Magazine Awards.

But most of all in our tenth year we set the scene for our next ten years, and beyond, committing billions of dollars on new aircraft, new technology, new equity partnerships, new markets and new ideas, all of which will form the foundations of our future.

The largest commitment in our history was our announcement in November of orders, options and purchase rights for up to 199 new Boeing and Airbus aircraft, for delivery between 2018 and 2025, at a total value of up to US$67 billion at list prices.

In doing so, we became a launch customer for the brand new Boeing 777-X, and with additional orders, we became the largest airline customer for the Boeing 787 Dreamliner.

We also increased our orders for the all-new Airbus A350-XWB (extra wide body) and narrow-bodied Airbus A320s and A321s.

In addition, to support our accelerated network growth plans, we acquired two Airbus A330-200s from India’s Jet Airways and signed agreements to buy five Boeing 777-200LR aircraft from Air India. All of these aircraft will be introduced into Etihad Airways service in 2014.

Supporting our rapid expansion, we completed in December the construction of a new flight training centre in Abu Dhabi, in which six additional flight simulators will be installed to train pilots on aircraft types including the Airbus A380 super jumbo and the Boeing 787, both of which will join our fleet at the end of 2014.

When Etihad Airways was launched in 2003, our mandate included developing a global presence and brand. We needed to grow quickly, but knew that in our own right we could never match the scale of our competitors, most of which had been flying for decades, even generations. So we created a new business model for the airline industry – collaborative growth, built on a three-tier strategy of organic expansion, codeshare partnerships and minority equity investments in other airlines.

This has proved to be the right strategy, delivering global scale as well as revenue growth and cost efficiencies that we could never have achieved or afforded had we acted alone. By the end of 2013 we operated or had announced services to 102 destinations in our own right. But through our partnerships we had a “virtual network” which provided access to almost 400 destinations.

Our partner airlines contributed US$820 million, or 21 per cent of Etihad Airways’ net revenue from passenger services, up 30 per cent over 2012.

We increased codeshare partnerships from 40 at the end of 2012 to 47 at the end of 2013. But the most significant and defining growth came from our minority equity investments in other strategically important airlines.

We started 2013 with four members of the partnership we call the Etihad Airways airline equity alliance – airberlin, Air Seychelles, Virgin Australia and Aer Lingus.

By year’s end that number had increased to seven, with India’s Jet Airways added to our portfolio, and regulatory approval sought to acquire 33.3 per cent of the Swiss-based regional carrier Darwin Airline and a 49 per cent stake in Air Serbia, formerly Jat Airways.

In November 2013, we announced the formal launch of a new sub-brand, Etihad Regional, through which we will access secondary markets or inaugurate new routes which neither we nor our partners currently fly. Darwin Airline is the first carrier to adopt this branding, and is now operating as Etihad Regional — Switzerland.

While continuing to innovate through new investments, we also nurture our existing partnerships, and in 2013 we increased our shareholding in Virgin Australia from nine per cent to 99 per cent, which emphasised our commitment to the Australasian market.

Our partnership growth in 2013 was not just in the air. In February, we activated a 10-year, US$1 billion partnership with the US corporation Sabre Airline Solutions, introducing a new, single IT platform for our global passenger services system, from reservations and web check-in to flight dispatch and baggage delivery. Appropriately, this was branded “The Big Switch”. It has transformed and streamlined our way of working and enabled us to connect more smoothly with partner airlines using the same system.

Still on the ground, we acquired three airport services companies from Abu Dhabi Airports Company – Abu Dhabi Cargo Company, Abu Dhabi In-Flight Catering and the ground handling business, Abu Dhabi Airport Services.

From this three-strand investment, Etihad Airways created a new subsidiary, Etihad Airport Services, which now operates Etihad-branded ground handling, cargo and in-flight catering services, not only to support our own operations at Abu Dhabi, but those of other airlines, making this an investment in both the growth of our own business and the continued development of Abu Dhabi as a quality air transport hub.

For our premium guests, we opened new luxury lounges at Paris Charles De Gaulle, Abu Dhabi International Airport, and Washington Dulles airports, and continued to refine our in-flight offering, including recruitment of more in-flight chefs to crew the First Class cabins on our increasing portfolio of long-haul flights, and more food and beverage managers for Business Class.

We introduced our Flying Nanny service, to take care of our youngest travellers.
We are building the future.
In our tenth year, we set the scene for our next ten years and beyond.

We continued to add in-flight Wi-Fi, mobile phone connectivity and live television connections on our wide-body aircraft fleet, all of which will be equipped by mid-2014.

We also launched our new global television and print advertising campaign, featuring the slogan “The world is our home, you are our guest”, and replaced our previous slogan “Bringing Abu Dhabi to the World” with the simplified “Etihad Airways: Abu Dhabi”, reflecting the growing global recognition of our brand and our home, and our ongoing commitment as an economic enabler for the Emirate of Abu Dhabi and its 2030 growth strategy.

A measure of our recognition was the continued growth of our loyalty program, Etihad Guest, with membership numbers up by 21 per cent from 19 million in 2013 to 2.3 million at the end of 2013 – an average increase of almost 1,100 members every day.

Our strongest-performing business unit was Etihad Cargo, which delivered tonnage growth of 32 per cent over 2012, an achievement even more significant when compared with the global market, which was stagnant.

The growth of Etihad Cargo was underpinned by the introduction of new, larger aircraft and services including a Boeing 747-8 freighter operated by our partner, Atlas Air, on a weekly round-the-world route linking Abu Dhabi with Asia, the USA, South America and Europe.

To support our growth in 2013, we increased core airline employee numbers by 27 per cent to a year-end total of 13,535 from 142 nationalities.

This included 1,468 Emirati employees, an increase of 17 per cent over 2012, and a key focus of Etihad Airways as the national airline of the United Arab Emirates.

Adding the new Etihad Airport Services, our group numbers swelled by an additional 4,006 employees to 17,593 at year’s end, and will continue to increase in 2014.

All of our achievements in 2013 were delivered against a very challenging economic and geopolitical background, with many economies, particularly those in Europe, remaining subdued, while other markets were impacted by geopolitical and regulatory issues, or natural disasters such as the devastating typhoon in the Philippines.

The commercial climate remained difficult, particularly in such markets as Europe and the Americas, where constrained economic growth and strong competitive pressures compressed yields, with significant impact on revenues.

We combined our organic growth in 2013 with collaborative expansion in which resources and costs were shared with equity and codeshare partners to maximise productivity and achieve mutually-beneficial and sustainable outcomes.

We also maintained a strong focus on cost reduction through ongoing reviews of our own practices and cost efficiencies resulting from our investments and acquisitions.

For Etihad Airways, growth in 2014 will continue to be dynamic but measured, in line with our continuous goal to be best in class wherever we fly, adding value to the markets which we serve and to our home, Abu Dhabi.

Our commitment was rewarded in 2013 when we won the “Excellence Entity in Leadership” title in the Abu Dhabi Award for Excellence in Government Performance. We are building the future.

In 2014 we will inaugurate services to nine new destinations in the US, Europe, Australia, India, Thailand, Saudi Arabia and Armenia. We will continue to grow our partnerships and expand our organic operations. We will also continue to employ new staff, providing job opportunities in one of the world’s fastest-growing and most exciting companies. And we will continue to innovate, with our first Airbus A380 super jumbo and Boeing 787-9 Dreamliner due for delivery in the final quarter of 2014, delivering not just new levels of comfort for our guests, but also significant new cost efficiencies and environmental benefits through reduced noise and carbon emissions.

All of this will be done with our over-riding commitment to safety, which is the starting point for all of our operations. And it will be done with a continued focus on profitability, delivering on our mandate to operate a commercially sustainable business.

I also want to thank our guests and our business partners, whose support has enabled us to continue to grow profitably in a challenging economic climate around the world.

And finally, I thank the employees of Etihad Airways, whose ceaseless commitment and contribution have enabled us to achieve our extraordinary growth, our reputation for excellence and our confidence in the future.

James Hogan
President and
Chief Executive Officer

Emirates as a global leader in air transport.

In closing, I would like to thank our shareholder, the Government of Abu Dhabi, and the members of our Board, led by the Chairman, His Highness Sheikh Hamed bin Zayed Al Nahyan, for their continuing support of our management team and our strategy to develop the national airline of the United Arab Emirates.

ETIHAD AIRWAYS ANNUAL REPORT 2013 | 7
Etihad Airways carried 11.5 million passengers in 2013, 12 per cent more than the 10.3 million flown in 2012.

Revenue Passenger Kilometres (RPKs) — representing passenger journeys - increased by 16 per cent to 55.5 billion (47.7 billion), while Available Seat Kilometres (ASKs) — representing capacity - grew by 17 per cent to 71.1 billion (61 billion).

These figures reflect strong growth in passenger traffic volumes in a year when Etihad Airways added six new destinations – Washington DC, Amsterdam, São Paulo, Belgrade, Ho Chi Minh City and Sana’a, and increased capacity on 18 existing routes.

At year’s end, the average network-wide seat load factor was 78 per cent, unchanged from the previous year.

The Etihad Airways fleet increased by 19 aircraft, from 70 to 89 units, with the addition of 16 passenger aircraft and three freighters.

Cargo volumes increased by a solid 32 per cent to 486,753 tonnes, reflecting increased belly capacity available on additional passenger flights and expanded operations with pure freighters.

A key measure of the airline’s continued growth was an increase in employee numbers, with staff numbers in the core airline rising to 13,535, 27 per cent higher than the 10,656 in 2012.

In addition, the acquisition of three businesses from Abu Dhabi Airports Company, covering ground handling, catering and cargo, added over 4,000 more employees to the group, taking total staff numbers to 17,593 from 142 nationalities.
Etihad Airways continued to achieve double-digit growth in key areas of financial performance during 2013.

Headlining the year’s results, the airline posted a net profit of US$62 million, its third consecutive profit and a fitting end to its milestone tenth anniversary year.

The result was the highest achieved by Etihad Airways, exceeding by 48 per cent the 2012 reported profit of US$42 million.

Revenues for the year totalled US$6.1 billion, 27 per cent above the US$4.8 billion achieved in 2012.

EBITDAR, or earnings before interest, tax, depreciation, amortisation and rentals, also rose by 30 per cent from US$753 million to US$979 million.

A key contributor to the record result was the Etihad Airways partnership strategy, through which organic expansion is supplemented by codeshare arrangements and minority investments in other airlines.

Partner airlines contributed US$820 million, or 21 per cent of Etihad Airways’ total passenger revenues, a rise of 30 per cent over the US$629 million produced by partners in 2012.

At the end of the 2013, Etihad Airways had 47 codeshare partners, up by seven. The airline also had seven partners in equity was held or regulatory approval was pending – an increase of three over the previous year.

In addition to airberlin (29.21 per cent), Air Seychelles (40 per cent plus management contract), Virgin Australia (19.9 per cent) and Aer Lingus (2.987 per cent), Etihad Airways acquired 24 per cent of India’s Jet Airways and at year’s end was awaiting regulatory approval to acquire 49 per cent of Air Serbia and 33.3 per cent of the Swiss regional carrier Darwin Airline, now operating as Etihad Regional – Switzerland.

The Virgin Australia shareholding was increased from nine per cent at the start of 2013 to 19.9 per cent at year’s end following approval from Australia’s Foreign Investment Review Board. Etihad Airways further demonstrated its support by participating in a AUD$350 million capital raising by Virgin Australia.

In what was a static global market for the air freight industry, Etihad Cargo was a major exception, achieving net revenue growth of 30 per cent to US$928 million.

Etihad Airways maintained a disciplined financial management strategy, underpinned by a robust hedging policy to mitigate risks from fluctuations in foreign exchange, interest rates, jet fuel prices and carbon emission pricing.

At the end of 2013, hedge levels for major variables were 47 per cent for foreign exchange and 62.6 per cent, 33.1 per cent and 7.7 per cent for jet fuel exposures in 2014, 2015 and 2016 respectively.

In line with its shareholder mandate to operate commercially, Etihad Airways continued to build a diversified portfolio of financing partners, raising a total of US$2.14 billion from 16 global institutions to finance the delivery of 22 aircraft – six Boeing 777-300ERs, two Boeing 777-200 freighters, four Airbus A330-200s, one Airbus A330-200 freighter, six Airbus A320-200s, one Airbus A321 and two Airbus A319-200s, as well as three Rolls Royce Trent 700 engines, one Rolls Royce Trent 500 engine and one IAE V2500 engine.

Over the past ten years, Etihad Airways has raised more than US$9 billion in cumulative funding in the financial markets and has established partnerships with more than 70 financial institutions.

This level of support reflects market confidence in and support for the measured financial and operational strategies of Etihad Airways, and the credible business plan which the airline has developed and continues to evolve.
Etihad Airways’ role in the Abu Dhabi Plan 2030

International travel and tourism continued to grow in 2013, with the International Air Transport Association estimating that 3.1 billion travellers took to the air. Travel and tourism is one of the world’s largest economic sectors accounting for nine per cent of the global GDP, one in every 12 jobs and up to eight per cent of the total exports of the world’s least developed countries.

These figures reaffirm the economic development strategy outlined in the Abu Dhabi Plan 2030, in which aviation is recognised as a critical industry and a fundamental driver of global economic growth.

Tony Tyler, Director General and Chief Executive Officer of IATA, said in his 2013 annual review:

Aviation’s role as a catalyst for economic growth has never been clearer. The global economy is showing signs of strengthened growth powered primarily by robust emerging markets. Aviation is a critical link to facilitate trade with those economies that are expanding.

Creating wealth

The UK-based research group Oxford Economics, as part of a review of global aviation, said Etihad Airways and its partners continued to play a crucial role in supporting and driving economic growth in the UAE. The airline’s growth and sustained commercial success are good for Abu Dhabi, which continues to evolve as an international business and leisure destination.

Etihad Airways, its subsidiary companies, joint ventures and airline equity partners contributed a total of US$15.6 billion to Abu Dhabi’s GDP in 2013. This represents 12.8 per cent of the non-oil GDP of the Emirate. The group supported 181,852 jobs in total, or 119 per cent of non-oil jobs, supporting Abu Dhabi’s commitment to diversify its economy beyond the oil industry.

The economic contribution is classified into four key areas: direct (within Etihad Airways), indirect (supply chain), induced (spending of direct and indirect employees) and catalytic (impacts on trade, tourism and connectivity).

Direct economic contribution:

The airline and associated businesses contributed more than US$3.2 billion to Abu Dhabi’s GDP in 2013.
Indirect economic contribution:
Etihad Airways made an indirect economic contribution of US$1.7 billion and supported an additional 23,373 jobs in 2013 through expenditure including fuel purchases, maintenance and repair, airport rental and landing fees, marketing, advertising, IT ventures and communications.

Induced economic contribution:
An induced GDP contribution of US$2.6 billion and 22,296 additional jobs can be attributed to money spent during 2013 by employees of Etihad Airways and its suppliers.

Catalytic economic contribution:
Etihad Airways played an important role in improving air links between Abu Dhabi and the rest of the global economy, and the airline’s expanding network was a key factor in encouraging businesses to invest in the Emirate and the UAE.

These activities provided a catalytic economic contribution of nearly US$9 billion, and supported nearly 118,484 jobs.

Etihad Airways also continued to be a key contributor to the development and growth of tourism in the UAE in 2013, carrying 11.5 million passengers through its hub in Abu Dhabi, and supporting the capital with sponsorship and marketing investments around the world.

Building a national workforce
A key imperative for Abu Dhabi and a critical element of the Etihad Airways mandate is the development of long-term strategic initiatives aimed at developing the national workforce by creating employment opportunities, motivating young people, equipping them with the right workplace skills, and enabling and empowering them to fulfill their potential in a sustainable economy.

The airline’s workforce at the end of 2013 included 1,468 Emirati employees, a 17 per cent increase over the 1,254 employed in 2012.

The national workforce will continue to grow in 2014 as the airline enters its second decade, and a major new phase of growth.
NETWORK

In 2013:

102 destinations
60 countries
6 continents
Etihad Airways continued to grow its global network in 2013 through a combination of organic expansion, codeshare partnerships and minority investments in other airlines.

At 31 December, Etihad Airways operated or had announced scheduled services to 102 passenger and freight destinations in 60 countries.

With its 47 codeshare partners, including members of its airline equity alliance, Etihad Airways offered flights to almost 400 destinations at year’s end.

Etihad Airways’ impressive growth in 2013 was achieved through a combination of new routes and increased frequencies or use of larger aircraft in existing markets.

Services were launched from Abu Dhabi to six new destinations - Washington DC, Amsterdam, São Paulo, Belgrade, Sana’a and Ho Chi Minh City.

Additional flights were introduced to 18 existing destinations in the Gulf Cooperation Council states, Middle East, Australia, Africa, central and south-east Asia, India, Pakistan and Russia.

In most cases, the extra flights boosted destinations to daily or double daily frequencies, and by the end of 2013, 84 per cent of Etihad Airways destinations received at least a daily service.

The introduction of larger aircraft also provided additional capacity to nine existing destinations - New York, London, Sydney, Melbourne, Dublin, Moscow, Washington DC, Mumbai and New Delhi.

As well as its own new or expanded services, existing and new codeshare partnerships contributed strongly to the growth of the Etihad Airways network.

Etihad Cargo, too, expanded its operations during 2013, with the most significant network development being the introduction of a weekly round-the-world service, using a leased Boeing 747-8 freighter to fly from Abu Dhabi to Hong Kong, the USA, Brazil, Ecuador, the Netherlands and back to Abu Dhabi. Etihad Cargo also launched services to key markets including Guangzhou, China and Tbilisi, Georgia.

The nine new destinations to be served from 2014 are the US cities of Los Angeles and Dallas, the European gateways of Zurich and Rome, Perth in Australia, Jaipur in India, Phuket in Thailand, Medina in Saudi Arabia and Yerevan in Armenia.

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* Includes announced destinations to commence in 2014
CODESHARE PARTNERS

In 2013:

47 partner airlines

41 countries

Virtual network of almost 400 destinations
Etihad Airways is committed to a strategy of collaborative growth in order to gain the scale it requires to be competitive in the global air transport market.

Beyond its organic development, the airline has a strong base of codeshare partners, providing access to hundreds of destinations which it does not serve with its own aircraft.

In 2013, Etihad Airways signed new codeshare agreements with seven airlines - South African Airways, Kenya Airways, Air Canada, Korean Air, Air Serbia, Belavia and airBaltic. These additions took total codeshare partnerships to 47 at year’s end.

Among the codeshare partners in 2013 were six of the seven members of the Etihad Airways equity alliance — airberlin, Air Seychelles, Virgin Australia, Aer Lingus, Air Serbia and Jet Airways.

Subject to regulatory approvals, the seventh equity partner, Swiss regional carrier Darwin Airline, operating as Etihad Regional-Switzerland, will begin to codeshare with Etihad Airways early in 2014.

As well as new partners, Etihad Airways also strengthened a number of existing relationships in 2013, expanding agreements with carriers including Air France, KLM, Alitalia, Aer Lingus and Garuda Indonesia.

Etihad Airways also added its code to Abu Dhabi-Hong Kong services operated by equity partner Air Seychelles.

Among the codeshare partners at 31 December 2013, Etihad Airways operated or had announced services to 102 passenger destinations. Combined with its cargo and codeshare services at year’s end, the airline served a virtual network of almost 400 destinations, significantly more than any other Gulf carrier.
To meet its mandate to be global, competitive, profitable and financially independent, Etihad Airways needs to build scale and reduce costs.

In its own right, the airline can never achieve the size of its major competitors, most of which have been flying for decades or, in some cases, generations.

So it has developed a new business model which supplements organic growth and codeshare partnerships with minority investments in other strategically-important airlines.

Codeshare and commercial partnerships deliver revenue, network access and customer loyalty opportunities.

Equity goes much further. It enables Etihad Airways to significantly reduce unit costs and achieve productivity gains and cost savings which otherwise could be achieved only through a merger or takeover.

It also streamlines entry into new markets and facilitates rapid growth through the use of established networks, facilities and customer bases.

Equity means skin in the game, ensuring commitment and obligation by both airlines, and much deeper cooperation than a commercial partnership can deliver. It offers savings through resource sharing such as joint training of pilots and cabin crew, shared maintenance of common aircraft types, joint leasing of property and unified sales and marketing activities.
Equity also enables joint procurement of assets, services and supplies, from office stationery to aircraft, providing major economies of scale which legacy airline alliances cannot offer to their members. And it creates opportunities to share best practice and to transfer knowledge, for mutual benefit.

At the start of 2013, Etihad Airways owned 29 per cent of airberlin, 40 per cent of Air Seychelles, nine per cent of Virgin Australia and just under three per cent of Aer Lingus. By year’s end, Etihad Airways had also acquired 24 per cent of India’s Jet Airways, increased its Virgin Australia shareholding to 19.9 per cent and was awaiting regulatory approval to acquire 49 per cent of Air Serbia and 33.3 per cent of the Swiss-based regional carrier Darwin Airline, now operating as Etihad Regional-Switzerland.

**BENEFITS OF EXISTING PARTNERSHIPS**

Equity and codeshare partners contributed revenues of US$820 million to Etihad Airways during 2013. This represented a 30 per cent increase over 2012, and 21 per cent of the year’s total revenues for Etihad Airways, which reciprocated by contributing passengers and freight to partner airlines.

In the case of equity partners, the benefits were even greater, significantly reducing unit costs and operating expenses through activities including resource sharing and joint procurement.

During 2013, Etihad Airways operated a number of services using aircraft from the fleets of Jet Airways, Virgin Australia and Air Seychelles, while also providing aircraft to partners including Air Seychelles and Air Serbia to meet short-term requirements.

Etihad Airways hired 50 pilots surplus to airberlin’s requirements and shared new office facilities in Germany with airberlin, provided training for pilots and cabin crews from several partner airlines and participated in joint sales and marketing activities with a number of partners around the world.

Etihad Airways also extended the benefits of its equity relationships by connecting partner airlines with each other, as well as by integrating partner airlines into the Etihad Guest loyalty program.
Etihad Airways and the Government of Serbia signed a wide-ranging partnership agreement in August 2013, designed to recapitalise and reinvigorate Jat Airways, the national airline of Serbia.

Under the terms of the agreement, Etihad Airways secured a five-year contract to restructure and manage Jat Airways, and at year end, was awaiting regulatory approval to acquire a 49 per cent stake in the airline.

In return, Etihad Airways gained access to the Serbian carrier’s network, which will deliver broader coverage in Europe and greater feeder traffic opportunities.

The first and most defining decision of the new management was to rebrand the carrier as Air Serbia.

The airline was “right-sized”, with specific focus on key personnel to manage operations and standards most effectively. The route network and flight schedules were restructured to maximise connectivity between Air Serbia’s own services and those of Etihad Airways and other partner airlines, via Serbia’s capital city, Belgrade.

Etihad Airways assisted in sourcing a leased fleet of Airbus A319 and A320 jets to replace Air Serbia’s ageing Boeing 737-300 fleet.

On 26 October, Air Serbia took to the skies, using its first A319 to inaugurate services between Belgrade and the Etihad Airways global hub in Abu Dhabi.

In November 2013, Air Serbia announced orders for 10 new Airbus A320neo aircraft to replace the leased fleet, with deliveries scheduled to occur between 2018 and 2020. In making this order, Air Serbia was able to benefit from the existing relationship which Etihad Airways enjoys with Airbus Industrie.

Air Serbia also became a partner in the Etihad Guest loyalty program, which provided added benefits for passengers of both carriers.

To underpin their partnership, Etihad Airways and the Government of Serbia committed start-up funding of US$100 million to Air Serbia – a US$40 million cash injection and US$60 million in additional funding.

Etihad Airways provided a US$40 million loan in 2013, to be converted to 49 per cent equity in 2014. The Government of Serbia will continue to be the majority shareholder, retaining control with its 51 per cent stake.
After extensive consultation with regulatory authorities, Etihad Airways gained approval in November 2013 to acquire 24 per cent of Indian airline Jet Airways. This partnership will deliver significant benefits to both carriers, more choice for air travellers and substantial economic gains for the United Arab Emirates and India through increased business, leisure and family travel between both countries.

India also stands to gain a significant increase in tourist arrivals from a range of international markets, via the Etihad Airways hub in the UAE capital, Abu Dhabi. This transaction represents the largest single investment which Etihad Airways has made in another airline, a commitment of US$740 million comprising US$370 million in equity, US$150 million of loan support, a US$150 million majority investment in the Jet Airways frequent flyer program, Jet Privilege, and a US$70 million purchase and leaseback of three pairs of arrival and departure slots used by Jet Airways at London’s Heathrow Airport.

At the end of December 2013, Jet Airways served a network of 55 destinations in India and 20 international cities – a total of 75 destinations in 16 countries. The airline and its wholly-owned subsidiary, Jet Lite (branded JetKonnect), operated 113 aircraft and directly employed 13,508 people.

Subject to receiving regulatory approvals, Etihad Airways and Jet Airways will introduce more flights and codeshare on each other’s services between the UAE and India. Etihad Airways also will codeshare on Jet Airways flights within India.

In addition, subject to approvals by other countries, Etihad Airways and Jet Airways will introduce new flights and codeshare on each other’s services to destinations in the US, Europe and other markets.

As well as the earnings from increased services, both airlines expect substantial economic benefits to accrue from cost-efficiencies including resource sharing, joint procurement and common product definition and implementation.
Etihad Regional

Etihad Airways announced a step change in global aviation when, in November 2013, it unveiled Etihad Regional, a new sub-brand developed to extend the Etihad name into secondary markets.

Through existing partnerships, Etihad Airways can expand its operations by placing its “EY” code on flights operated by other airlines.

Etihad Regional goes one step further by applying the Etihad brand and product standards to partner airlines serving secondary routes – from repainting aircraft into Etihad Regional livery to introducing Etihad-style staff uniforms, consistent in-flight product across the airlines and integrating partner airlines into the Etihad Guest loyalty program.

This enables Etihad Airways to build brand recognition in markets which it does not serve in its own right, and on routes not served by existing partners.

The Etihad Regional concept also offers more travel options to Etihad Airways’ customers around the world, while enabling customers in regional destinations to connect with global markets via the Etihad Airways network.

The launch vehicle for Etihad Regional is a small Swiss-based carrier, Darwin Airline, in which Etihad Airways is acquiring a 33.3 per cent stake, subject to regulatory approval.

Darwin Airline now operates as Etihad Regional-Switzerland.

Headquartered in Lugano, with its major hub in Geneva, the airline ended 2013 offering year-round scheduled flights to 15 destinations in Europe, and seasonal or contract flights to other markets, using a fleet of ten 50-seat Saab 2000 turboprop aircraft.

By mid-2014, under the Etihad Regional brand, Etihad Regional-Switzerland will fly to 34 destinations in Europe, including seven gateways served by Etihad Airways.

In line with Etihad Airways’ partnership strategy, Etihad Regional-Switzerland also will connect with the networks of two other Etihad equity partners, airberlin and Air Serbia. Subject to regulatory approvals, Etihad Airways, airberlin and Air Serbia will codeshare on Etihad Regional-Switzerland routes, while it will codeshare on flights by the three larger carriers from a range of European gateways.
Etihad Airways is 100 per cent owned by the Government of Abu Dhabi, with a mandate to operate safely and profitably on a fully commercial basis.

To maximise its efficiency and support its core airline operations, Etihad Airways has acquired or established complementary subsidiary businesses or entered strategic joint venture partnerships covering activities from property to airport services.

Subsidiary and joint venture operations expanded in 2013 as Etihad Airways diversified its activities to ensure greater control over its own service standards and delivery.
In July 2013, Etihad Airways acquired three subsidiaries of the Abu Dhabi Airports Company (ADAC) – Abu Dhabi Cargo Company (ADCC), Abu Dhabi In-Flight Catering (ADIFC) and the ground handling business Abu Dhabi Airport Services (ADAS).

From this investment, Etihad Airways created a new subsidiary, Etihad Airport Services, which now operates Etihad-branded ground handling, cargo and in-flight catering services to support its own services through Abu Dhabi, as well as those of other airlines.

The establishment of Etihad Airport Services is a strategic investment not only in three growth enterprises, but also in the delivery of consistently high quality services at the Abu Dhabi hub.

As the largest airline customer using Abu Dhabi Airport, Etihad Airways can better manage its product and service delivery through ownership of key customer functions and services, while also passing on the same high quality services to customer airlines and freight operators.

By integrating these businesses into the Etihad Airways group, the companies can achieve substantial cost efficiencies through productivity improvements, sharing of resources such as IT systems and training facilities, joint procurement of equipment, supplies and services and the transfer of knowledge and technology to achieve “best practice” outcomes.
Etihad Airport Services, Ground is responsible for activities at Abu Dhabi Airport including “above wing” tasks of check-in, baggage handling and special assistance to passengers. This also includes airside activities such as loading and unloading of baggage, provision and operation of aircraft servicing equipment, aircraft cabin cleaning, passenger and crew transport to the aircraft, and the “push back” of departing aircraft from terminals or parking bays. The “above wing” activities are sub-contracted to Etihad Airways.

Etihad Airport Services, Cargo is the sole cargo handling business at Abu Dhabi International Airport. It provides freight handling services as well as warehousing, documentation, security screening and handling of specialised cargo for Etihad Airways and other carriers. In addition, this business works closely with freight forwarders, government agencies and regulatory authorities.

Etihad Airport Services, Catering sources, prepares and provides food, stores, bar supplies and duty free items as specified by Etihad Airways and other airline customers, as well as transportation of supplies, laundry services for cabin linen items, and the provision and cleaning of all catering items. In addition, this business is responsible for food storage, transportation and equipment maintenance. It also manages food and beverage services for Etihad Airways airport lounges, as well as staff restaurants, events and sales of ready-to-eat food products to the hotel and hospitality industries.
JOINT VENTURES

ALDAR ETIHAD INVESTMENT PROPERTIES LLC (AEIP)

Aldar Etihad Investment Properties LLC (AEIP) is a 50:50 joint venture between Etihad Airways and Aldar Properties. The primary asset is the Abraaj Towers development, known as Etihad Plaza. The complex, opposite the Etihad Airways headquarters building, includes company housing occupied by cabin crew and head office staff, a large medical centre for Etihad Airways employees, a base for several Etihad Airways head office functions, and a number of retail tenancies.

ALDAR ETIHAD DEVELOPMENT LLC (AED)

Aldar Etihad Development LLC (AED) is a 50:50 joint venture between Etihad Airways and Aldar Properties. The primary assets are the Etihad Airways headquarters building, its Training Academy and its flight simulator building. As part of this partnership, Etihad Airways sold the headquarters building to Aldar Etihad Development and now leases the property back.

ALDAR ETIHAD FIRST INVESTMENT PROPERTIES LLC (AEFIP)

Aldar Etihad First Investment Properties LLC (AEFIP) was established in December 2012 as a 50:50 joint venture between Etihad Airways and Aldar Properties, with the primary asset being the Al Noor office tower (Etihad Airways Centre), located at Al Raha Beach. This building will provide office space for the airline, and in 2014 will accommodate the new Etihad Airways Training Academy. Office staff located at Etihad Plaza will transfer to the Etihad Airways Centre in 2014, freeing space to expand both retail facilities and the Etihad Airways Medical Centre, and to establish a nursery for children of employees.

HALA TRAVEL MANAGEMENT (HTM)

Hala Travel Management (HTM) is a joint venture between Etihad Airways (80 per cent) and BCD Travel, the third-largest travel company in the world (20 per cent). HTM is a travel management company (TMC) which provides travel-related services including global flight reservations, hotel accommodation, car rental and insurance for corporate and government clients.

ARMAGARD VALUABLES MANAGEMENT LLC

Armagard Valuables Management LLC is a joint venture between Etihad Airways (51 per cent) and Australia’s Linfox Group (49 per cent), providing international transportation of valuable goods.

TOPBONUS LTD

Topbonus Ltd is a joint venture between Etihad Airways and airberlin, incorporated to own airberlin’s topbonus frequent flyer program, as part of a broader strategy to develop a global loyalty management business. Etihad Airways owns a 70 per cent stake in this company, which is registered and incorporated in the United Kingdom.
SUBSIDIARIES & INVESTMENTS

ASC (AIRLINE SERVICES CENTRE) PRIVATE LTD
ASC (Airline Services Centre) Private Ltd is a wholly-owned subsidiary of Etihad Airways. ASC Airline Services Centre is located in India and provides call centre services for Etihad Airways.

AMADEUS GULF LLC
Amadeus Gulf LLC is a technology solution provider for the travel and tourism industries. It is 51 per cent owned by Etihad Airways and 49 per cent owned by the Amadeus IT Group S.A. The principal activities of this company are the provision of global distribution system services and associated technology to support the sales, marketing and distribution needs of travel and tourism entities in the UAE, Bahrain and Oman.

UNIVERSAL AIR TRAVEL PLAN
Etihad Airways is one of many leading airlines which hold a stake in Universal Air Travel Plan (UATP), a global corporate travel payment network. UATP facilitates payments by corporate customers, to eliminate processing fees normally associated with credit card transactions, and provides important links with the corporate travel market. In the UAE, Etihad Airways is the only active member of this plan.
FLEET

Ethad Airways celebrated its tenth anniversary in 2013. But it was the carrier’s continued focus on building for the future which best defined the year.

The airline’s fleet at 31 December comprised 89 Airbus and Boeing jets, 19 more than in 2012. However, the year also included the airline’s largest deal for new aircraft, with firm orders, options and purchase rights announced in November 2013 for up to 199 Airbus and Boeing aircraft, valued at up to US$67 billion at list prices. These new narrow-body and wide-body aircraft will be introduced between 2017 and 2025, to meet the airline’s growth requirements up to 2040.

This deal built upon the announcement in 2008 of orders, options and purchase rights for up to 200 aircraft valued at up to US$43 billion – a deal which, at the time, was the largest single fleet announcement of any airline.

2013 FLEET INCREASES

Ethad Airways received 16 passenger jets during 2013. Of these, 11 were delivered directly from manufacturers – six wide-body Boeing 777-300ERs, four narrow-body Airbus A320-200s and the airline’s first Airbus A321. Another five aircraft – all wide-body Airbus A330-200s – were sourced from India’s Jet Airways. Three were leased and two were purchased.

Ethad Cargo procured three new freighters – two Boeing 777-200Fs and one Airbus A330-200F. It also wet leased a Boeing 747-400ERF from KLM Royal Dutch Airlines and a Boeing 747-8F from US operator Atlas Air to replace two older aircraft.

NEW LONG-TERM AIRCRAFT ORDERS

The November 2013 fleet announcement by Etihad Airways signalled its long-term growth intentions, with firm orders for 87 Airbus and 56 Boeing aircraft and 56 options and purchase rights to support Etihad Airways and potentially members of its airline equity alliance. The new orders included 25 Boeing 777-X, (17 B777-9X and eight B777-8X), 30 Boeing 787-10 Dreamliners, one Boeing 777-200 freighter, 50 Airbus A350-XWB, 36 Airbus A320neo family narrow-bodies and one Airbus A330-200 freighter.

Combined with existing orders for aircraft including 41 Boeing 787-9 Dreamliners, 10 Airbus A380 super jumbos and 12 Airbus A350-XWB, the November fleet announcement increased to more than 220 the number of firm orders for new aircraft. Etihad Airways also signed agreements to purchase five Boeing 777-200LR aircraft from Air India, to provide additional capacity for the next decade, after which new long-haul aircraft will enter service.
In July 2008, Etihad Airways announced plans to acquire up to 200 Airbus and Boeing aircraft, including its first Airbus A380 super jumbos and Boeing 787-9 Dreamliners.

During 2013, detailed planning continued for the introduction of both types, the first of which will be delivered to Etihad Airways in the fourth quarter of 2014, and introduced into revenue service from 2015.

To introduce any new aircraft type is a major undertaking, from cabin product definition to technology support, aircrew and ground staff training, flight operations planning, network deployment and global airport handling.

To introduce two new types at the same time is an altogether more complex task. The airline has placed firm orders for 10 Airbus A380s, which will be used to provide significant capacity increases between Abu Dhabi and major destinations including London, New York, Sydney and Melbourne, while the larger fleet of Boeing 787-9 aircraft initially will fly between Abu Dhabi and destinations including Washington DC and key European cities.

In addition to its orders for 41 Boeing 787-9s, Etihad Airways announced in November 2013 firm orders for 30 of the larger Boeing 787-10 model, and in doing so became the largest airline customer for the Dreamliner.

The Boeing 787 and the Airbus A380 each will deliver significant new standards of comfort for passengers, while also utilising new aerospace technology which will deliver substantial reductions in fuel burn, CO2 emissions and noise.
FLIGHT OPERATIONS

Etihad Airways operated 74,924 flights in 2013, an increase of 14 per cent or 9,471 flights more than 2012.

Block hours — or the time between aircraft pushback at the departure airport and engine shutdown at the destination — increased by 57,871 hours, or 17 per cent.

This reflected a combination of flights to new passenger and freight destinations and additional services on existing routes.

PILOT RECRUITMENT AND TRAINING

The rapid expansion of the Etihad Airways aircraft fleet and route network required a substantial increase in recruitment and training of pilots.

This was in addition to recurrent training of existing crews and conversion training of pilots transferring between aircraft types.

During the year, Etihad Airways received 19 passenger and freight aircraft, including its first Airbus A321 and three Airbus A330-200 aircraft which were leased from India’s Jet Airways and operated with Etihad Airways crews.

To accommodate its substantial growth, Etihad Airways recruited 304 pilots in 2013 - 154 direct entry captains and 150 first officers.

The airline also hired 66 second officers, including 44 UAE nationals.

At the end of 2013, 514 pilots had either completed or were participating in the Etihad Airways cadet pilot training scheme.
The benefits of partnership were demonstrated during 2013, when Etihad Airways recruited 50 surplus pilots from airberlin – a move which helped both airlines and ensured ongoing employment for the pilots.

Etihad Airways also provided substantial operational support for partner airlines. The most significant requirement was from new partner Air Serbia, which began replacing its Boeing 737-300 fleet with Airbus A319 aircraft.

Etihad Airways provided two Airbus A319s during the transition period, while equity partner airberlin provided Air Serbia pilots with conversion training from Boeing to Airbus aircraft.

Assistance was also provided to another partner, Air Seychelles, which added a second Airbus A330-200 during 2013. Etihad Airways provided senior crew to operate this aircraft while Air Seychelles trained additional pilots. Etihad Airways also provided an Airbus A320 and pilots to enable Air Seychelles to operate increased services during peak periods.

**INFRASTRUCTURE**

In November 2013, Etihad Airways completed the expansion of its Flight Training Centre in Abu Dhabi, constructed to house six new flight simulators, classrooms for pilot and cabin crew training, pilot briefing and debriefing areas, a pilots’ lounge and additional offices.

The additional simulators will support training of pilots for Airbus A320, Boeing 777, Boeing 787 and Airbus A380 aircraft. The first of the new simulators, for Airbus A320 pilot training, was installed in December 2013.

New line maintenance stations were opened in Chicago and Singapore, and equity partner airberlin’s line support was integrated with that of Etihad Airways on common fleet types serving destinations including Abu Dhabi, Munich and Düsseldorf.

**MAINTENANCE**

Heavy maintenance was conducted on 48 aircraft during 2013. Four Airbus A330s and three Boeing 777-300ERs received complete cabin refurbishments while upgrades were completed on another 17 aircraft.

The introduction of onboard connectivity for Wi-Fi and mobile telephones continued across the fleet, with mid-2014 the target for completion. Upgrading of the E-Box inflight entertainment system also commenced across the fleet to introduce access to live television.

**PERFORMANCE**

Etihad Airways achieved a record 99.3 per cent technical dispatch reliability during 2013. However, the airline’s schedule integrity was impacted by a range of “one-off” factors, with total on-time performance for the year at an average 68 per cent.

Major construction work at Abu Dhabi International Airport combined with a significant increase in flights by Etihad Airways necessitated an increase in bus transfers between the terminal and aircraft parked in remote positions, as sections of the building were closed or restricted for renovations.

In February 2013, Etihad Airways introduced the SabreSonic Passenger Services System, a single global platform for functions including reservations, check-in, baggage handling and aircraft dispatch. This was a large and complex change which impacted upon the airline’s operations as employees and ground handling companies around the world retrained and became familiar with the new system.

Air traffic control restrictions imposed on evening flights through Omani airspace – a long-term issue for all airlines that serve the Arabian Gulf - continued to disrupt flights by all carriers flying between the United Arab Emirates and destinations to the south and east, including the Indian sub-continent, south-east Asia and Australia.

Omani airspace restrictions accounted for four per cent of the direct delays for Etihad Airways during 2013, with knock-on disruption to later flights. This was the largest single cause of delays in the Etihad Airways network.

Etihad Airways acquired three businesses from Abu Dhabi Airports Company (ADAC) – Abu Dhabi Cargo Company (ADCC), Abu Dhabi In-Flight Catering (ADIFC) and the ground handling business Abu Dhabi Airport Services (ADAS).

From this investment, Etihad Airways created Etihad Airport Services, which now operates Etihad-branded ground handling, cargo and in-flight catering services, giving the airline greater control of its total service.

With new facilities becoming available at Abu Dhabi Airport towards the end of 2013, and Etihad Airways gaining more control over its ground handling operations, the fourth quarter of 2013 saw the airline’s on-time performance recover significantly.
SAFETY

Safety is a core commitment of Etihad Airways.

As the airline continued to expand, and as its partnerships increased in 2013, the company redoubled its efforts to ensure that safety and quality standards not only were maintained but also were enhanced across all activities.

The Safety and Quality Department organised multiple seminars in 2013 to help promote safety and enable continuous improvement.

The company’s Safety Management System was subject to an annual base inspection by the General Civil Aviation Authority (GCAA), which again resulted in zero adverse findings.

The Environment Health and Safety Management System was audited in accordance with the statutory provisions of the Abu Dhabi Environment, Health and Safety regulatory framework, confirming that Etihad Airways was fully compliant.

The Corporate Safety and Quality Department of Etihad Airways expanded its operations to provide 24-hour coverage, year round. This included the introduction of on-call Safety Duty Managers, a move which helped to reduce from two hours in 2012 to just 10 minutes in 2013 the average time for incident information to be received.

Following the acquisition of catering, cargo and ground handling businesses from Abu Dhabi Airports Company and the establishment of Etihad Airport Services (EAS), three new divisions - EAS Ground, EAS Cargo and EAS Catering were integrated into the Etihad Safety Management System to ensure a consistent safety culture throughout the group.

The Safety and Quality Department organised two safety meetings during 2013 for strategic business partners, to help ensure that they understood and supported the Etihad Airways safety culture.

The Etihad Airways Safety Management System, which underpins safe operations, was also expanded to include a new process to ensure more accurate tracking of the airline’s activities against established safety performance indicators.

The company’s safety management system was a key element of an aviation insurance roadshow conducted by Etihad Airways for insurance providers during 2013.

This system is a vehicle to help protect company assets, increase profitability and reduce insurance claims, and therefore premiums, through consistent safe practice.

During 2013, awareness of the Etihad Airways safety reporting culture remained above the industry standard at a rate of 28 air safety reports per 1,000 flights, evidence of continued awareness of safety issues within the company.

To encourage and support timely reporting of incidents, a web-based system was developed to enable “real time” reporting of safety issues and improved communication of safety issues and information.
FUEL EFFICIENCY

After wages and salaries, fuel is the highest expense for airlines.
Etihad Airways continues to explore opportunities to maximise fuel efficiency, specifically through sophisticated flight planning techniques which reduce both fuel consumption and carbon emissions.

In 2013, the airline developed a new satellite-based procedure, designed to shorten the approach paths of flights into its home base of Abu Dhabi.

Through this procedure, the airline reduced the fuel consumption, carbon emissions and noise of its aircraft descending into Abu Dhabi.

With more than 100 flights each day into the city, Etihad Airways has the potential to save up to 150 flight hours per month, equal to a fleet-wide fuel saving of five million litres and a 12 million kilogram reduction in carbon emissions.

Etihad Airways has also introduced a new approach to flight planning, replacing fixed “company routes” with a new strategy of optimised routes.

Each Etihad Airways flight is now planned using software which assesses and selects the best routes available, and takes into account tailwinds and headwinds, the shortest flight paths, and en-route fees including the most favourable “overflight costs” charged by various countries for the use their airspace.

Etihad Airways now optimises every flight in its network, which significantly reduces fuel consumption and carbon emissions, and achieves sizeable savings.

ROUTE OPTIMISATION

Every day, at 10.20am, Etihad Airways flight EY 151 departs Abu Dhabi, bound for the US city of Chicago. This flight, one of the longest in the airline’s network, is operated by a three-class Boeing 777-300ER seating 328 passengers.

Typically, a Boeing 777-300 following a “fixed route” will take 14 hours and 30 minutes to fly between Abu Dhabi and Chicago. This flight will consume 113,350 kilograms of fuel and cost approximately US$151,760 to operate.

However, by optimising the Abu Dhabi – Chicago route, Etihad Airways can shorten the journey by up to 20 minutes in each direction, reducing the journey time to 14 hours, 10 minutes and cutting fuel consumption in each direction by 2,308 kilograms, or two per cent. This also reduces carbon emissions by 7,000 kilograms.

Based on prevailing conditions on December 30, 2013, the optimised cost of flying from Abu Dhabi and Chicago was US$147,300, a saving of US$4,460, or almost three per cent.

In a full year, this program would reduce the cost of roundtrip flights between Abu Dhabi and Chicago by more than US$3 million.

Extended across its entire network, and still considering variables including weather and air traffic delays, route optimisation offers substantial savings to the airline and greater convenience to passengers.
CORPORATE & SOCIAL RESPONSIBILITY

Etihad Airways works with the aviation industry and with partners and stakeholders in the private and public sectors in a collaborative effort called “Together,” a four-part policy, communications and reporting framework for its corporate responsibility program.

GREENER TOGETHER
Greener Together embodies the airline’s commitment to working internally and with industry partners, suppliers and customers to manage and minimise the environmental impact of the airline’s operations, and this has resulted in tangible environmental achievements.

GROWING TOGETHER
Growing Together supports the growth and economic development of Abu Dhabi in line with the Abu Dhabi Plan 2030.

WORKING TOGETHER
Working Together encompasses investment in the training, development and wellbeing of a multicultural workforce, with the core airline employing staff from more than 140 nationalities during 2013.

GIVING TOGETHER
Giving Together encompasses Etihad Airways’ support for nominated charities and humanitarian programs across the network.

ENVIRONMENTAL COMMITMENTS

MEASURING PERFORMANCE
Etihad Airways collects data over a range of activities to measure its carbon footprint and other environmental indicators, including energy and water used on the ground and in the air.

Measuring aircraft fuel efficiency is critical, as fuel accounts for up to 40 per cent of total operating costs and emissions reduction is a clear industry target.

Etihad Airways has made significant improvements in fuel efficiency and, as a result, emissions reductions. Since 2006, the airline has achieved a 24 per cent reduction in emissions per passenger kilometre across the passenger fleet. For the entire fleet, including freighters, efficiency improvement of 14 per cent per tonne kilometre has been achieved since 2008, more than double the industry target of 1.5 per cent efficiency improvement per year.

WASTE MANAGEMENT
A diverse strategy of waste management incorporates recycling at our ground facilities and in the air.

Employees are informed of recycling opportunities and are encouraged to segregate waste, both at home and in the workplace.

The EAS catering facility at Abu Dhabi International Airport has procedures in place to collect and segregate recyclable items from aircraft. Each day, Etihad Airways crew members collect over 2,500 plastic bottles and 300 aluminium cans for recycling. More than 20 tonnes of glass are collected and sent for recycling every month.

SUSTAINABLE ALTERNATIVE FUELS
Etihad Airways recognises the role alternative fuels will play in the future sustainability of the airline industry, a view that is gaining wider recognition not only within the aviation sector but also with policymakers. Etihad Airways is at the forefront of the regional movement towards alternative sustainable fuels.

The airline is a founding partner of the Sustainable Bioenergy Research Consortium (SBRC), led by the Masdar Institute for Science and Technology. In conjunction with Boeing, Honeywell’s UOP, the aircraft engine manufacturer SAFRAN and the Abu Dhabi Government, the SBRC is tasked with identifying commercially viable options for production of sustainable alternative fuel. Etihad Airways has committed over US$2 million to support this initiative.

The SBRC’s flagship project is the Integrated Seawater Energy Aquaculture System (ISEAS), which focuses on the development of a potential plant-based feedstock, making use of nutrient-rich effluent from fish and shrimp farms. Local pollution problems are reduced by not disposing of this waste water directly to sea, diverting it instead through an oil-producing and saltwater-tolerant plant called Salicornia. The seeds of this plant produce oil which ultimately can be used to produce alternative fuel for aircraft.

In early 2014, a pilot scale ISEAS will be constructed at Masdar City in Abu Dhabi. This two hectare site will be used to trial the process and showcase the technology prior to the development of a larger commercial facility.
ETIHAD CARGO

Etihad Cargo carried 486,753 tonnes of freight in 2013, a 32 per cent increase over 2012. This was a standout result in the air freight industry, which on average was static for the year.

Etihad Cargo was one of the strongest contributors to the airline’s consolidated results, generating revenue of US$928 million, up 30 per cent, and accounting for 20 per cent of total revenues.

Growth was driven by a combination of additional freight aircraft, new cargo routes and new passenger destinations, providing additional belly space freight capacity. As its activities increased, Etihad Cargo also commenced a global marketing campaign, with the slogan: “The world is our business. Let us take care of yours.”

Etihad Cargo was named Best Overall Carrier in 2013 by the Italian Association of Air Cargo Agents.

CARGO FLEET

In 2013, Etihad Cargo increased its fleet from six dedicated freighters to nine – three Boeing 777-200Fs, three Airbus A330-200Fs and three leased Boeing 747Fs.

Etihad Cargo introduced two new Boeing 777-200F and one Airbus A330-200F aircraft, increasing both efficiency and capacity.

Two freighters, an Airbus A300 and a Boeing MD11, were replaced with a Boeing 747-400ERF from KLM, and a Boeing 747-8F from Atlas Air.

NETWORK EXPANSION

In 2013, Etihad Cargo expanded its pure freight operations through a mix of new routes and expanded capacity in existing markets.

The biggest single initiative was the introduction of a weekly round-the-world service using the Boeing 747-8F on a circuit from Abu Dhabi to Hong Kong, the USA, South America and Europe.

Freighter services were introduced to destinations including Guangzhou in China, Tbilisi in Georgia and Lagos in Nigeria, with even more capacity becoming available through cargo partnerships with Singapore Airlines, and Atlas Air. Existing freight markets also expanded as more frequency was introduced, or as equipment was upgraded, providing more choice for Etihad Cargo customers.

Increased passenger services by the core airline also provided more “belly space” freight capacity. New routes opened
between Abu Dhabi and Washington DC, Amsterdam, Belgrade, São Paulo, Ho Chi Minh City and Sana’a, while capacity increased in a range of other markets, or through expanded partnerships with other airlines.

Etihad Cargo is also providing sales distribution for both airberlin and Air Seychelles, two of the members of the Etihad Airways airline equity alliance.

GROUND SERVICES
Etihad Cargo expanded on the ground as well as in the air. During 2013, Etihad Airways acquired a number of businesses from Abu Dhabi Airports Company, including its cargo handling arm, which has been rebranded as Etihad Airport Services, Cargo.

Through this transaction, Etihad Cargo has become the core air freight handler for airlines serving Abu Dhabi, and in 2013 committed to a significant expansion of airport freight facilities to accommodate the increased demand.

In addition to creating an integrated air cargo business at Abu Dhabi Airport, the expansion of Etihad Cargo activities will enable the airline to increase the contribution it makes to its shareholder, the Government of Abu Dhabi.

Also during 2013, the Etihad Airways joint venture with Armaguard (AVM) launched a secure trucking service to Dubai and the northern emirates for valuable airfreight shipments. AVM also commissioned a new vault at Abu Dhabi International Airport to support this rapidly-growing sector.

In addition, Etihad Cargo signed preferred partner agreements with two international freight handling companies, Swissport and Worldwide Flight Services.

CARGOCONNECT
In 2013, Etihad Cargo introduced a rewards program for its small to medium enterprise (SME) freight customers, reflecting its continued innovation and leadership in this sector.

Leveraging the Etihad Guest loyalty scheme, this program enables customers to earn loyalty points which can be redeemed for Etihad Airways flights.

At the end of the year, the CargoConnect program had more than 1,300 members.

TECHNOLOGY
In June 2013, Etihad Cargo completed its first successful trial of an electronic document, or e-airwaybill, with its customer DHL, on a shipment between London and Abu Dhabi. The trial was supported by Abu Dhabi Customs.

In December 2013, Etihad Cargo became the first freight carrier in the Gulf region, and one of the first in the world, to implement Cargo-XML, the new technology standard for air cargo communications. As part of an industry drive for e-freight, led by IATA, Cargo-XML eliminates the need for paper documentation and speeds processing of cargo.

An enhanced website was also introduced and a business intelligence platform implemented, enabling decision making and speedy response by customers.

CHARTER FLIGHTS
The increase in Etihad Cargo fleet capacity provides greater flexibility and capability to operate charter flights.

In 2013, Etihad Cargo operated more than 500 charters, representing 12 per cent of revenues.

Reflecting its increasing global presence, Etihad Cargo operated charter flights during 2013 to destinations as far afield as Brazil, Papua New Guinea, Mongolia and Burkina Faso.

Etihad Cargo also operated 12 charter flights to support relief efforts following the devastating typhoon in the Philippines in November.
The key achievement in 2013 of the Information Technology department, and one of the biggest achievements for the airline, was the migration of passenger services systems to SabreSonic, to provide a single global platform for more than 40 reservations and departure control systems.

Known as “The Big Switch”, the final alignment and integration of these disparate systems occurred globally on February 23, 2013 following the training of almost 7,000 employees.

In addition to harmonising the airline’s reservations and departure control systems, SabreSonic streamlined connectivity between the IT systems of Etihad Airways and partner airlines, to improve efficiency and productivity.

In addition to the 10-year, US$1 billion partnership between the airline and US-based Sabre Airline Solutions - Etihad Airways signed a 10-year deal with technology provider SITA Aero. This agreement was for the supply of global wide-area networks, data centre hosting, desktop service and end user computing support, the first such partnership between SITA and any airline.

Also with SITA, Etihad Airways introduced the iKnow system, providing in-flight tablet devices to all cabin managers, enabling them to gain online access to information such as flight connections and individual passenger requirements.

The IT department completed the Infrastructure Virtualisation Program, commissioning a virtual data centre, to improve significantly the reliability and security of the company’s data hosting.

Most of the airline’s major systems have been migrated to this facility, which is core to the strategy of providing business-enabling IT support at the lowest cost.

As well as major procurement and implementation, the IT department played a key role in the integration of IT systems between Etihad Airways and airline equity partners, and the new Etihad Airport Services subsidiary.

Trials of new e-airway bills were completed for Etihad Cargo, the first IATA carrier to achieve this.

Additionally, Etihad Airways IT supported the opening of 15 new airport offices, nine new sales offices and six new routes in 2013.
Etihad Airways continued to build its sales performance in 2013, as new destinations were introduced, flights increased in existing markets and activities intensified with both codeshare and equity partners.

Total revenue increased by 14.7 per cent over 2012, with corporate revenue up by nine per cent and premium revenues by 15 per cent.

Underpinning this growth was significant expansion of corporate business for Etihad Airways, with over 570 new accounts secured in 50 markets.

Revenue from global accounts reached US$950 million in 2013, 22 per cent, or US$155 million above 2012, with global corporate accounts up by 42 per cent.

During 2013, major global contracts were signed with 12 existing or new partners for periods of up to four years, reflecting the growing awareness of, and satisfaction with, Etihad Airways, its increasing network and frequencies, and the quality of its multi-award winning in-flight product and service.

BusinessConnect, the Etihad Airways loyalty program for small- and medium-sized businesses, achieved maturity, with a 400 per cent increase in registered accounts compared with 2012. This program is designed to reward enterprises which, although too small to qualify for corporate deals, still choose to fly Etihad Airways.

A key development in 2013 was the opening of the new Etihad Travel Mall, a 2,000 square metre mixed-use facility in the heart of Dubai, enabling guests not only to plan and book their travel with Etihad Airways, but also to check in their luggage and to transfer by luxury coach to connect with their flights from Abu Dhabi Airport. A return service also operates for passengers arriving in Abu Dhabi and continuing to Dubai.

The Etihad Travel Mall includes car hire from global partner Hertz, money exchange facilities by Arablink, a travel essentials store opened by Relay and, from the first quarter of 2014, will also feature a gourmet café operated by Jones The Grocer.

New offices also were established in a range of markets to accommodate the expansion by Etihad Airways. Of these, the largest were Berlin and Sydney, where new regional centres were established as bases not only for Etihad Airways staff but also for the sales teams of partner airlines. In Berlin, for example, the new Etihad Airways Europe regional office also houses facilities for airberlin.

In addition to revenue increases achieved by Etihad Airways Sales, there were also significant cost reductions, specifically through reductions in global distribution system costs through renegotiated and prevailing agreements.
E-COMMERCE

Etihad.com is an integrated sales and marketing channel for Etihad Airways, with 100 country-specific websites enabling consumers to book flights, rental cars and chauffeur services, and to check in for flights or update their bookings.

In 2013, with the introduction of the new SabreSonic passenger services system, Etihad Airways launched an enhanced core website, its first mobile website, new content management and anti-fraud systems, and a wide range of non-credit payment methods across more than 30 countries. etihad.com was upgraded to offer five new languages, taking the total to 15.

Total revenue delivered via etihad.com increased by 16 per cent in 2013, contributing 12.3 per cent to the total passenger revenue of Etihad Airways.

CONTACT CENTRES

Etihad Airways operates contact centres in four locations – Abu Dhabi, Al Ain, Manchester and Mumbai. In 2013, the centres handled more than 2.6 million calls from guests in 37 markets and provided service in 14 languages. Total revenue from contact centres increased by more than 50 per cent over 2012, representing 2.4 per cent of the revenue of Etihad Airways.

Through the introduction of the new SabreSonic passenger services system, the airline’s contact centres gained increased capability to sell the airline’s services and products.

Contact centres also continued to grow to support the airline’s global expansion, with the Manchester Contact Centre – opened early in 2012 – now supporting guests from 22 markets, in 11 languages, and the Al Ain contact centre – staffed entirely by Emirati women – expanding to accommodate UAE travel industry calls and provide support for the Abu Dhabi Government Employee Travel program.

ETIHAD HOLIDAYS

Etihad Holidays continued to expand in 2013. The launch of dynamic packaging on the Etihad Airways website in the British and German markets enabled the promotion of holiday packages to Abu Dhabi and other key tourist destinations served by the airline. Consolidation of the contact centre holidays and wholesale operations teams provided greater efficiency, reflected in increased service levels and operational coverage. A new booking platform is planned for launch in the first quarter of 2014 to support expansion of Etihad Holidays direct sales channels.

HALA ABU DHABI

Hala Abu Dhabi grew strongly in 2013. A store was established in the new Etihad Travel Mall in Dubai, new products were launched including “Meet and Greet” services at Abu Dhabi Airport, desert safari tours and “Story of Abu Dhabi City” tours, with Hala guest guides.

Golf in Abu Dhabi is now an established product within the international golf community and Hala Abu Dhabi contributes 25 per cent of all international golf rounds booked.

Hala Sports also completed a successful Etihad Airways Abu Dhabi Formula 1 event, recording its largest number of F1 package sales and managing more than 300 VIP guests for Mubadala. Hala Abu Dhabi Events also provided professional conference services and ground logistics for major events held in Abu Dhabi including the World Travel and Tourism Council Summit and the World Economic Forum - Summit on the Global Agenda.
MARKETING

Etihad Airways launched an international brand advertising campaign in 2013, with the slogan “The world is our home. You are our guest.” The campaign featured television, national press and online channels in ten key markets, supporting the airline’s ongoing campaign to build a prominent global brand.

The Etihad Airways brand was also introduced to six new markets – Washington DC, Amsterdam, São Paulo, Belgrade, Ho Chi Minh City and Sana’a, and supported by “below the line” marketing, focused on both trade and consumers across 82 of the airline’s international offices.

As part of the Etihad Airways equity alliance strategy, the airline provided joint marketing support for partner airlines – airberlin, Air Seychelles, Virgin Australia, Aer Lingus, Air Serbia and Jet Airways, as well as the new Etihad Regional brand, announced in November 2013.

Joint marketing funds were secured from a range of tourism authorities, providing in excess of US$3.1 million for co-branded campaigns.

Etihad Airways intensified database marketing in 2013, with revenue from promotions reaching US$142.4 million, an increase of 138 per cent over 2012. Of this, US$99.3 million was generated by premium product promotions and US$43.1 million from Economy Class activities.

A new database was also developed for consumer marketing, reaching over 350,000 records by year’s end.

Etihad Airways launched “Abu Dhabi NOW” to the travel trade across the network, and with the support of 30 hotel partners, offered 4,000 room nights for trade incentives.

A trade incentive program in 24 countries during 2013 offered flight, hotel and ticket packages to see the Etihad Airways-sponsored English Premier League team Manchester City. This generated more than US$13 million in incremental revenue.

The airline’s Access Abu Dhabi partnership with Abu Dhabi Tourism and Cultural Authority generated almost 100,000 visitors to Abu Dhabi through incentives to leading tour operators in the UK, Germany, Australia, Russia, India and the GCC states.

In addition to key sponsorships, Etihad Airways expanded its Guest Ambassadors program following its successful launch in 2012 with Indian “Bollywood” star Katrina Kaif.

New ambassadors signed in 2013 were Australian-Vietnamese chef Luke Nguyen, former Australian cricketer Shane Warne, Manchester City Youth Team coach Patrick Viera, Australian entertainer Dannii Minogue and German golfer Martin Kaymer.

The guest ambassadors are used to promote brand awareness in key markets, support new route launches, offer rewards to members of the Etihad Guest loyalty program and provide content for social media channels and Etihad Airways in-flight entertainment.

Etihad Airways sponsored over 30 Abu Dhabi events and conferences, as well as the Etihad Junior Rugby Festival, attracting 3,000 children in the UAE, and Etihad–Manchester City soccer schools in Abu Dhabi, South Africa, Seychelles and India, with more than 2,000 children participating.
SOCIAL MEDIA

A major growth area for Etihad Airways in 2013 was social media.

The airline’s global Facebook following grew by 82 per cent, from 317,000 fans to 577,000, while the Arabic Facebook following went up by 412 per cent, from 12,300 fans in 2012 to 63,000 in 2013.

The number of Twitter followers also grew strongly, with the airline’s global account increasing by 195 per cent, from 12,800 followers to 37,300, while the Arabic Twitter account attracted 2,400 followers after launching in May.

The Etihad Airways Google Plus fan base increased from 294 fans to 123,500 during 2013, where LinkedIn following grew by 217 per cent from 25,500 followers in 2012 to 81,000 in 2013.

To improve social media response times, Etihad Airways introduced a dedicated round-the-clock community management team to support customer enquiries, complaints and comments, reducing the average response time from 36 minutes in 2012 to 10 minutes by December 2013.
The Guest Services division of Etihad Airways is responsible for the quality and delivery of service to the airline’s guests, in the air and on the ground. Its activities range from employee training to the management of airport lounges, recruitment and implementation of cabin crew and service standards aboard all Etihad Airways flights.

In 2013, designated “Year of the Guest” by Etihad Airways, Guest Services continued to play a critical role in supporting the airline’s expansion, while building on the company’s commitment to be “best in class”.

During the year, Etihad Airways launched six new routes and expanded services in 18 existing markets. To help accommodate this growth, Guest Services recruited 1,500 new flight attendants, boosting total cabin crew numbers by 25 per cent to 4,500.

Guest Services also continued to innovate in the air, introducing the Flying Nanny service in which specially-trained flight attendants provide expert child care aboard Etihad Airways flights. By the end of 2013, 750 Etihad Airways cabin crew had completed training as Flying Nannies in a program jointly developed by the airline and the UK-based Norland College, and conducted at the Etihad Airways Training Academy in Abu Dhabi.

In January 2013, Guest Services assumed responsibility for the airline’s growing portfolio of airport lounges in order to keep building a seamless and consistent experience for guests.

New lounges were opened in Paris and Washington DC, while in Abu Dhabi, the airline’s home base, a new First Class lounge was opened in Terminal 3, allowing the previous First and Business Class facilities in Terminal 1 to be combined into a dedicated Business Class lounge. The Washington lounge also features the airline’s first aerobridge direct to the aircraft, eliminating the need for premium guests to re-enter the general terminal to board their flights. Up to six new lounges are planned for 2014, in locations including Abu Dhabi, Sydney, New York and Los Angeles.

As part of the airline-wide drive to reduce operating costs and improve guest experience, Guest Services continued to innovate, and in 2013 introduced onboard iPads to improve individual service as well as replacing heavy paper documentation for cabin supervisors.

The customised tablet devices provide online access to information including guests’ frequent flyer status, meal preferences, onward flight connections and details of any issues which may have arisen on previous sectors.

For more than two months during the peak summer travel period in 2013, Etihad Airways Guest Services provided a total of 500 cabin crew to assist guests at the Abu Dhabi Airport. Another 220 flight attendants were provided to support Etihad Airways promotions and launches worldwide during 2013. The “Take 2” campaign was introduced at Abu Dhabi Airport, in which Guest Services trained and encouraged customer contact staff each to spend two minutes adding extra value to the experience of every guest.

The contribution of Etihad Airways’ cabin crew throughout the year was rewarded with major accolades including, for the first time, the title of “World’s Leading Airline Cabin Crew” in the prestigious World Travel Awards, coinciding with the airline’s fifth consecutive title as “World’s Leading Airline.” In the US, Etihad Airways also won Global Traveler Magazine’s awards for “Best Airline Lounges”.

**SUPPORTING PARTNER AIRLINES**

In addition to the requirements of Etihad Airways, Guest Services increasingly supported the airline’s equity alliance partners during 2013.

For Air Seychelles, in which Etihad Airways has a 40 per cent stake and a management contract, Guest Services helped to recruit and train new cabin crew, provided recurrent training for existing flight attendants and delivered Chinese cultural training for Air Seychelles crews prior to the launch of flights to Hong Kong.

Even more significant was the Guest Services contribution to another partner airline, Air Serbia, for which it recruited and assessed cabin crew and designed and delivered new in-flight menus and service standards to align with what is offered by Etihad Airways.

Guest Services worked closely with Air Serbia in the development and introduction of new uniforms for cabin crew, and at year’s end was well advanced in plans to deliver similar support to another new equity partner, the Swiss-based regional carrier Darwin Airline.

In addition, through its management of training for employees including cabin crew and lounge staff, Guest Services oversaw a 50 per cent increase in the number graduates from a wide range of courses at Etihad Airways Training Academy in Abu Dhabi.

In addition to accommodating the training requirements of Etihad Airways, Guest Services also managed a variety of contract training for a growing range of third-party airlines.

Revenue from training staff for third-party carriers increased by 51 per cent in 2013.
One of the core objectives of Etihad Airways is to be “best-in-class” in every market to which it flies. The Guest Experience department creates and manages the delivery of all experiences and environments throughout each guest’s journey with the airline.

During 2013, this process continued on the ground and in the air through initiatives including the opening of new premium lounges in Paris and Washington DC, and the network-wide introduction of the Flying Nanny service, providing in-flight support for families with young children.

The key focus for the year was the launch of “2014 and Beyond”, a comprehensive program to conceptualise, design, develop and implement new products and services for the future, using as a springboard the introduction in late 2014 of new Boeing 787 “Dreamliner” and Airbus A380 superjumbo aircraft.

The “2014 and Beyond” program will underpin the strategy of Etihad Airways to deliver industry-leading service and product initiatives, continuing the company’s commitment to deliver “remarkable” and “outstanding as standard” travel experiences.

To support this strategy, Guest Experience developed the Etihad Innovation Centre in Abu Dhabi to bring to life the vision of Etihad Airways for the next 10 years, and to further cement the airline’s position as an industry innovator and leader.

The portfolio and activities of the Guest Experience department were increased in 2013 following the acquisition by Etihad Airways of Abu Dhabi Inflight Catering from Abu Dhabi Airports Company and the creation of a new business, Etihad Airport Services Catering. The integration of this new division into the Etihad Airways catering division delivered not only significant process efficiencies but substantial opportunities for cost savings.
As Etihad Airways has grown, so too has its loyalty program, Etihad Guest, which was launched in 2006.

During 2013, Etihad Guest achieved substantial growth through organic expansion and the contributions of its growing number of airline and non-airline partners.

Core membership numbers increased by 400,000 — or 21 per cent — from 19 million at the end of 2012 to 2.3 million on December 31, 2013.

This represented an average of almost 1,100 guests joining the program every day.

At year’s end, Etihad Guest had members in 190 countries, and enjoyed the support of more than 170 partners, among them a growing number of non-airline entities.

Following investments by Etihad Airways in Air Seychelles and Air Serbia, both carriers were introduced into Etihad Guest in 2013, and negotiations were well advanced to introduce another partner, the Swiss-based regional carrier Darwin Airline, which, subject to regulatory approval, will become the first carrier to operate under the new Etihad Regional brand.

During 2013, redemptions by Etihad Guest members increased by 24 per cent, while rewards points donated to charities grew by 124 per cent.
PEOPLE AND PERFORMANCE
Just as Etihad’s global presence and operations have grown substantially in 2013, so too has the number of people employed by Etihad which reached 13,535 in the core airline operation by year end, an increase of 27 per cent on the previous year. Including the employees hired to support six new station start-ups, 85 per cent of the airline employees are based in Abu Dhabi, capital of the United Arab Emirates.

Integrating the new Etihad Airport Services subsidiary, formed after the acquisition of the catering, ground handling and cargo businesses from Abu Dhabi Airports Company, the Etihad Airways Group employed at the end of 2013 a total of 17,593 people comprising more than 140 nationalities – a 25 per cent increase over the group total for 2012.

NATIONAL WORKFORCE

As the national carrier of the United Arab Emirates, Etihad Airways is committed to growing and developing the national workforce, providing not only employment opportunities but also helping to expand and enrich the national skills and knowledge base. At the end of 2013, the airline’s workforce included 1,468 Emirati employees, a 17 per cent increase over 2012. Growth of the national workforce will continue in 2014, as the airline enters its second decade, and a major new phase of growth.

Recruitment of Emirati staff is underpinned by 10 training and mentorship programs for areas including cadet pilot training, technical engineering, information technology, human resources, sales, and graduate entry, all designed to match the needs of the airline with career opportunities for the national workforce.

In 2013, 750 UAE nationals were enrolled in the airline’s National Talent Development Program, and at year’s end, 70 Emirati employees of Etihad Airways were stationed internationally, either on assignment or permanent placement, up from 20 in 2012.

EMPLOYEE OPINION SURVEY

To help understand and measure employee attitudes and engagement, Etihad Airways introduced its first global employee survey, MyEY in late 2012. The survey was independently audited and provided valuable data to inform focus areas including communication, manager effectiveness and organisational culture.

Almost two out of three people completed the survey with an overwhelming 93 per cent of respondents feeling proud to be employed by Etihad Airways, noted equally amongst the expatriate and UAE national workforce. In addition, 92 per cent of employees indicated they were willing to go beyond the normal requirements in order to help Etihad Airways succeed, no doubt a key measure in the airline’s overall winning performance in the market. Employee engagement, a benchmark measure on employee commitment, was measured at 18 per cent above the global average.

The inaugural MyEY survey was helpful in identifying managerial effectiveness
and employee recognition as two key areas in which staff engagement could be improved.

In 2013, People and Performance responded by designing a program of initiatives to improve managerial effectiveness including the in-house design and delivery of Managerial Effectiveness Workshops to more than 1,000 managers in 20 countries over a three-month period.

Face-to-face sessions called “Majlis” were also developed to improve two-way communications across the company, providing employees with opportunities to exchange views and suggestions with their managers.

RECOGNITION AND REWARD

Building on the MyEY survey feedback, the airline introduced “Shukran” (Arabic for thank you), a global scheme to recognise employees demonstrating outstanding performance in the key values of Etihad Airways.

In addition, 2013 was the fourth full year of the Etihad Airways iAchieve performance management process, designed to ensure employees have clear objectives linked to the company’s goals and the regular review of progress during the course of the year. Continuing the philosophy of merit based pay, performance-based salary increases were again implemented in 2013, along with a substantial corporate bonus scheme.

In a business as dynamic as Etihad Airways, it is critical to ensure not only a talented workforce but placement of the right people in the right roles. Alongside the external recruitment of new talent, 30 per cent of management roles and all other vacancies were filled by internal candidates, a healthy sign of a growing, competent workforce.

EMPLOYEE FACILITIES

A workforce of this size, so global in its composition and growing so rapidly, requires the People and Performance division to look more widely than the core aspects of HR, to employee wellbeing and support, particularly for those employees based in the emirate of Abu Dhabi.

Etihad Airways committed in 2013 to a substantial increase in accommodation facilities, including the provision of additional residential complexes for expatriate staff, one a new development at Al Forsan and the other a leased complex in Al Bustan. In line with all of Etihad’s residential complexes, both facilities will be supported with state-of-the-art fitness centres.

The company also committed in 2013 to double the size of the Etihad Airways Medical Centre and to establish a nursery to provide childcare support for Etihad Airways employees. All of these facilities and new office space to accommodate headquarters growth are scheduled to open progressively in 2014.

EMPLOYEE WELLBEING

In addition to providing professional and locational support for employees, Etihad Airways continually strives to ensure the wellbeing of staff, through themed events, family days and health awareness campaigns.

During 2013, the Etihad Airways Medical Centre arranged educational initiatives and wellness days not only for employees of the airline but also for the Abu Dhabi community. These included a breast cancer awareness campaign, and both summer and winter wellness programs.

A key initiative in 2013 was the Etihad Airways family day at the Yas Marina Circuit
on Yas Island, Abu Dhabi, to celebrate the airline’s tenth anniversary.

**SUPPORT FOR PARTNER COMPANIES**

The organic growth of Etihad Airways is significant, with six new destinations added in 2013 and additional expansion planned in 2014. But the airline’s strategy of growth through equity investments in other airlines has created even greater challenges as Etihad Airways works alongside partner airlines to increase their organisational capability and performance to enable the business to succeed.

In the third quarter of 2013, Etihad Airways reached agreement with the Government of Serbia on a partnership with the national airline, Air Serbia including a five-year management contract.

Within a period of just 60 days Etihad Airways implemented a people change program to establish a ‘right shape, right size’ for the rebranded Air Serbia. The program ensured that resources were placed where they were needed to secure the operational and safe performance of the business, establishing a new head office organisation with new standards and ways of working, leveraging Etihad Airways’ centres of expertise in Abu Dhabi.

The People and Performance team facilitated the introduction of the first Air Serbia Graduate Management Program, through which 10 employees were selected from 700 applicants and seconded to Etihad Airways in Abu Dhabi to develop their aviation careers.

Etihad Airways also assisted Air Serbia to introduce cadet pilot training and engineering programs, the first development programs in 25 years.

Ongoing assistance also was provided to another equity partner, Air Seychelles, again managed under contract by Etihad Airways. Among the 2013 initiatives was the introduction of an iAchieve performance management program for employees and the provision by Etihad Airways of management effectiveness workshops for 54 Air Seychelles staff.

**PRODUCTIVITY AND COSTS**

Although employee numbers increased in 2013, so too did productivity as Etihad Airways continued to refine roles and processes, and to benefit from the synergies of strategic investments in other airlines and airport businesses.

For the second year in a row, savings of US$30 million were achieved in staff costs, demonstrating tight cost control within a significantly expanding employee base.

Etihad Airways continued to reduce annual leave balances, encouraging staff to take their full leave entitlements during the year. Unused leave carried forward has progressively reduced from an average 9.6 days at the end of 2010 to just 3.5 days at the end of 2013. This reduced financial liability transferring into the new year and increased the number of employees taking their full annual leave entitlement.

**HR AWARDS**

Etihad Airways was recognised in the 2013 Middle East Human Resources Excellence Awards for its market-leading initiatives, including awards in the Leadership category for its management effectiveness program, developed to educate managers about staff coaching and feedback. The airline also was recognised with an award in the Learning and Development category for the training program to support the ‘Big Switch’, ensuring that some 7,000 employees were trained on time in the use of the new Sabre passenger services system.
Etihad Airways marked its tenth anniversary with a grand celebration day for employees and their families at Yas Marina Circuit in Abu Dhabi. More than 20,000 people attended the event, which included activities, entertainment and competitions hosted by international celebrities.

The highlight of the day was the final of the Etihad Airways E-Factor talent competition, presented by Australian performer and X-Factor television show judge, Dannii Minogue, who is also an Etihad Airways Brand Ambassador. The event also included bouncy castles and rides for children, barbecue cooking demonstrations and competitions and motorsport activities including the Formula 1 Pit Crew experience and hot laps of the Yas Marina Circuit track.

Celebrations concluded with a gala reception attended by 500 people at Abu Dhabi Sailing and Yacht Club. VIP guests included HH Sheikh Hamed bin Zayed Al Nahyan, Chairman of the Crown Prince Court and Chairman of Etihad Airways, HH Sheikh Abdullah bin Zayed Al Nahyan, Minister of Foreign Affairs, HH Sheikh Ahmed bin Saeed Al Maktoum, CEO and Chairman of The Emirates Group, HH Sheikh Nahyan bin Mubarak Al Nahyan, Minister of Culture, Youth and Social Development, HH Sheikh Ahmed bin Saif Al Nahyan, Founder Chairman of Etihad Airways, and members of the Etihad Airways board.

Entertainment at the event was provided by Arabic singing star Kadim Al Sahir. Guests also were treated to a spectacular fly-past by an Etihad Airways Airbus A340-500, which cruised above Abu Dhabi’s Corniche breakwater at an altitude of just 600 feet, while earlier in the day one of the airline’s Airbus A330-200 aircraft performed a low fly-past of the Etihad Airways headquarters building near Abu Dhabi International Airport. The gala event concluded with a fireworks display.
James Hogan was appointed President and Chief Executive of Etihad Airways on 10 September 2006, bringing more than 30 years of travel industry expertise to the Abu Dhabi-based airline.

He has overseen rapid growth of the UAE’s national airline, which now serves 102 passenger and cargo destinations in the Middle East, Africa, Europe, Asia, Australia and the Americas operating a fleet of 89 modern environmentally friendly aircraft.

The milestone 2008 aircraft deal at Farnborough for up to 205 aircraft was followed in November 2013 with an order for up to 199 aircraft worth up to US$67 billion to support the airline’s network growth to 2025.

CEO Middle East Magazine named him Aviation CEO of the Year in 2008 and Visionary of the Year in 2010 and the CAPA Airline Executive of the Year 2012 Award for Excellence and Leadership. At the Airline Strategy Awards presented in London in July 2013, he received the Executive Leadership Award in recognition of his “influence on the aviation industry, outstanding strategic thinking, and innovative direction for growth.”

Mr. Hogan started his career in 1975 at Ansett Airlines, and subsequently held senior positions with bmi, Hertz, Forte Hotels and Gulf Air.

At Hertz, his roles included directorships of the marketing, sales and operations divisions. In 1995, based in London, he joined the executive management committee as Vice President, Marketing and Sales for Europe, Middle East and Africa.

In 1997, he became service director for bmi British Midland, leaving in 1998 to join the Granada Group as worldwide sales director, where he sat on the board of Forte Hotels.

He returned to bmi in 1999 as chief operating officer. There he was responsible for flight and ground operations, sales and marketing, commercial, cargo, engineering and handling service companies, and was a member of the Board.

He moved back to his native Australia in 2001, where he was appointed chief executive of the Tesna consortium, which was created with the aim of acquiring Ansett Airlines from administration, before joining Gulf Air in 2002, where he served as chief executive for four years.

Mr. Hogan is a fellow of the Royal Aeronautical Society and a former non-executive director, and member of the Board’s Audit Committee, of Gallaher Plc. In 2010, he served as the Chairman of the Aviation Travel and Tourism Governors at the World Economic Forum. He currently serves as Vice Chairman on the Executive Committee of the World Travel and Tourism Council (WTTC) and is a member of the UBS Industrialisation Advisory Board and the International Air Transport Association (IATA) Board of Governors. He serves as Vice Chairman of airberlin plc and on the Board of Jet Airways.
James Rigney
Chief Financial Officer
Australia

James Rigney was appointed to the position of Chief Financial Officer at Etihad Airways in October 2006.

Mr Rigney is responsible for finance, treasury, information technology, supply chain and property at Etihad Airways. He also sits on the Board of airberlin.

At the forefront of the 2007 financial restructuring of the airline, he has also concluded financing in excess of US$9 billion, in addition to implementing a fuel hedging program, world-class reporting and strong corporate governance.

In addition to receiving numerous awards on behalf of the finance department, Mr Rigney received the award for ‘Excellence in Finance – Public Sector’ at the 2009 MENA Chief Financial Officer Awards and the Finance Strategy Award at the Airline Business Airline Strategy awards in 2012. He was named Middle East Chief Financial Officer of the Year by the Institute of Chartered Accountants of England and Wales (ICAEW) for 2013.

Mr Rigney joined Etihad Airways from Gulf Air, where, as Head of Corporate Strategy, he played a role in the team responsible for the creation and implementation of the Project Falcon program between 2003 and 2005, repositioning the business on a commercial platform.

Prior to joining Gulf Air in 2002, Mr Rigney held a number of senior strategic and commercial positions within the Ansett Group. He began his career at KPMG before entering the airline industry.

Following Etihad Airways’ acquisition of a 24 per cent equity stake in Jet Airways, Mr Rigney was appointed to the Jet Airways Board. He is a chartered accountant and holds a Bachelor of Business and a Masters Degree in Business Administration from RMIT University in Melbourne, Australia.

Ray Gammell
Chief People & Performance Officer
Ireland

Mr Gammell is responsible for the recruitment, welfare, development and performance of all employees across Etihad Airways and Etihad Airport Services.

He is a HR professional with over 20 years’ experience, beginning his career as an Army Officer, before going on to hold successive senior positions in Royal Bank of Scotland, Ulster Bank Group and the Intel Corporation in the USA and Ireland.

Mr Gammell joined Etihad Airways in April 2009 from the Royal Bank of Scotland (RBS), where he was the Director of Human Resources for Europe and the Middle East regional markets.

He has led the creation of a strong People and Performance division working across the business to implement the “source, develop, deliver, engage” people strategy.

The People and Performance division and its initiatives were recognised by the GCC HR Excellence Awards and Middle East HR Awards.

These awards include Employer of the Year, Best Performance Management Strategy, Best Nationalisation Friendly Initiatives, Leadership Program of the year and Learning and Development Program of the year.

He is a chartered fellow at the Chartered Institute of Personnel Development and has a Masters Degree in Organisational Development.
Kevin Knight

Chief Strategy & Planning Officer
United States

Kevin Knight joined Etihad Airways as Chief Strategy and Planning Officer in March 2011. He is responsible for pricing, capacity and revenue management, route and network planning, alliances, fleet planning and government and aeropolitical affairs.

He also leads Etihad Cargo.

Mr Knight has more than 30 years’ experience in the airline industry, including business development, strategic planning and operations.

Before joining Etihad Airways, he spent 17 years at United Airlines, the last five as Senior Vice President Planning. He previously held senior roles at Northwest Airlines and Republic Airlines.

Mr Knight holds a Bachelor of Science in Business Administration from Westminster College, Utah, and an MBA from the University of Utah.

He is Vice Chairman of the Air Seychelles Board and chairman of Amadeus Gulf.

Richard Hill

Chief Operations Officer
United Kingdom

Captain Richard Hill joined Etihad Airways in January 2007 and was appointed Chief Operations Officer in April 2009. He is responsible for Etihad Airways’ flight operations, guest services, airport operations, technical, training standards, flight safety and quality and aviation security, including the airline’s emergency response procedures.

Captain Hill began his aviation career as a cadet pilot at British Airways in 1979. He spent 20 years with bmi British Midland, where he rose to the position of Director Flight Operations and finally Director Operations.

He joined Gulf Air in 2002 as General Manager Operations Technical and Head of Flight Operations. In 2006 he served as Head of the Flight Operations Inspectorate Department for the UK Civil Aviation Authority.

Captain Hill maintains his pilot qualification by operating as a Captain on the Airbus A330/A340 fleet.
Peter Baumgartner

Chief Commercial Officer
Switzerland

Peter Baumgartner was appointed Chief Commercial Officer in April 2009. He joined Etihad Airways in April 2004 and has managed the airline’s intense global commercial efforts during a period of rapid growth – both its network expansion and the introduction of new product and service innovations.

Mr Baumgartner heads the commercial strategy and planning function, global sales, marketing and brand management, product and service development, global contact centres, e-commerce, the airline’s international tour operating business Etihad Holidays, its destination management company Hala Abu Dhabi, and the airline’s loyalty program Etihad Guest.

Prior to joining Etihad Airways, he held a number of senior roles within the Swiss and Belgian aviation industries, including at Swiss International Airlines where he was responsible for marketing development and customer loyalty.

Peter Baumgartner is Chairman of the Board of Directors of Hala Travel Management (HTM), a joint-venture company with BCD Travel B.V, as well as Vice Chairman Darwin Airline, operating as Etihad Regional – Switzerland. He holds a Swiss Federal Degree in Transportation Management.

Jim Callaghan

General Counsel & Company Secretary
Ireland

Jim Callaghan became Etihad Airways’ General Counsel and Company Secretary in May 2009. Previously, he spent nine years at Europe’s largest low-cost carrier, Ryanair Ltd, as Company Secretary and Director of Legal and Regulatory Affairs.

At Ryanair, Mr Callaghan was responsible for setting up the airline’s legal function and for corporate governance and liaising with the Board.

He actively manages a suite of ongoing regulatory and legal issues relating to competition law, trademarks, airport contracts, advertising standards, consumer law, and commercial litigation.

Before joining Ryanair in 2000, Mr Callaghan spent several years at international law firms in the United States and in Brussels.

He holds a Juris Doctorate and a Masters in Public and International Affairs from the University of Pittsburgh and a Masters in European and International Law from Vrije Universiteit in Brussels.
Khaled Al Mehairbi joined Etihad Airways in January 2004 as Head of Corporate Affairs. He was appointed Senior Vice President Government and Aeropolitical Affairs in 2009, and is responsible for UAE and international government affairs, negotiating bilateral air service agreements for the airline.

Before joining Etihad Airways, Mr Al Mehairbi was Airport Director of Abu Dhabi International Airport. He also served as General Manager Abu Dhabi Airport Services. He has extensive experience in airport operations, including ground handling and civil aviation.

He is Chairman of the Aeropolitical Watch Group of the Arab Air Carriers Organisation. Mr Al Mehairbi has a Bachelor of Business from the USA’s Salem University.

Gordon Penfold was appointed Senior Vice President Information Technology in December 2010. Leading the IT team, he is responsible for Etihad Airways’ technology and communications framework as well as IT development, delivery and maintenance. Since joining Etihad, Mr Penfold has renewed the IT infrastructure and led the Big Switch program that culminated in the successful cutover to Sabre in February 2013.

Mr Penfold joined Etihad Airways from British Airways, where he was Chief Technology Officer. His extensive experience includes sales, marketing, operations and business management roles in the IT services, telecommunications, defence and aviation sectors, with assignments in the UK, Europe, Japan and North America, and long-term postings in South Africa and Hong Kong.

Mr Penfold graduated in Economics and Law from the University of London, and gained postgraduate qualifications in Computer Science from Brunel University.

Geoff Linaker joined Etihad Airways in 2010 as Senior Vice President Operations, after serving with bmi British Midland as Director of Operations.

He has 35 years’ experience in the aviation industry, including 18 years as a regulatory Postholder.

His previous roles include aircrew instruction, examining and technical management.

He is responsible as the GCAA nominated Postholder for Etihad Airways Flight Operations, Guest Services, Crew Resources and Operations Logistics, and in addition to his management role, is a current A330/A340 Captain.
Francois Oberholzer joined Etihad Airways in 2006 as Vice President Financial Planning and Analysis. He was seconded to airberlin in 2012 following an equity investment by Etihad Airways, before returning to Abu Dhabi in June 2013 to take up his current role, with responsibility for activities including mergers and acquisitions, corporate strategy development and synergy program management.

Mr. Oberholzer has been in the aviation industry since 1999. Prior to joining Etihad Airways, he served as Chief Financial Officer of South African Express Airways. He studied accounting sciences at the University of Pretoria and the University of South Africa before qualifying in 1996 as a chartered accountant.

Ajaz Ahmed Nazier has over 33 years’ experience in the aviation industry. He joined Etihad Airways in January 2010 and is responsible for managing and leveraging all key strategic contracts to drive profitability, including negotiating all major technical contracts relating to aircraft, engines and aircraft equipment.

He began his career at Gulf Air where he spent 27 years working within various technical operations before moving to Jet Airways in 2008 as Senior General Manager, Contracts. He is a graduate of Embry Riddle Aeronautical University holding a Bachelor of Science in Aviation Maintenance Management and Aircraft Technologies.

Werner Rothenbaecher joined Etihad Airways in November 2005. Prior to joining Etihad Airways, he held a number of senior technical operational roles with Lufthansa, including assignments with Lufthansa’s regional airline and cargo division.

His early career was with the German Air Force, where he led the maintenance organisation of the German Special Air Mission Wing and reached the rank of Lieutenant Colonel.

At Etihad Airways, he is responsible for engineering, technical purchasing and contracts, the technical operations control centre, aircraft cost control, aircraft specification, technical quality and reliability control, and line maintenance in Abu Dhabi and worldwide.

Mr. Rothenbaecher has a Master’s degree in Aircraft Engineering and Aerospace Technology from the University of Munich.

Hasan Al Hammadi joined Etihad Airways in 2009 as Vice President Special Projects, and was appointed Senior Vice President Executive Affairs in 2010, with additional responsibility for corporate security.

Mr Al Hammadi has more than 25 years’ experience at a senior management level in various UAE Government roles, holding senior positions across the Ministry of Interior. From 1982 to 1986, he was appointed to the Presidential Court, and then to the Abu Dhabi Crown Prince until 1990.

Mr Al Hammadi holds a degree in Petroleum Engineering from Manchester and Scotland University and a Post Graduate Diploma in Aviation Management from the University of Geneva and IATA.
John Shepley joined Etihad Airways in November 2006 as Senior Vice President Network Management and is responsible for development of the airline’s network and schedules, as well as developing and managing Etihad Airways’ relationship with airline partners worldwide.

Before joining Etihad Airways, Mr Shepley was with Australia’s Jetstar Airways, where he was General Manager Network and Schedules Planning, responsible for all domestic and international planning with a fleet of over 50 wide and narrow-body aircraft.

He has more than 20 years’ experience in aviation, including senior positions with Ansett Australia, Air New Zealand and Gulf Air in sales, airports, revenue management, planning and alliance areas.

Roy Kinnear joined Etihad Airways in 2006 as Vice President Revenue Management. He was appointed Senior Vice President, Cargo in 2010 and to his current role, as Senior Vice President Revenue Management and Planning in 2011, overseeing the revenue management and commercial planning for the company’s passenger and cargo business streams.

Mr Kinnear has 20 years’ experience in aviation, having previously worked in pricing, revenue management and scheduling for bmi British Midland. He is a former Chairman of the Board of Amadeus Gulf, the joint venture GDS company majority-owned by Etihad Airways, and is currently Chairman of Armaguard Valuables Management LLC, a joint venture company majority owned by Etihad Airways for the handling of high value cash and valuables shipments.

Mr Kinnear has a Bachelor of Science (Hons) Degree in Economics and Statistics from the University of Ulster.

Harsh Mohan joined Etihad Airways as Vice President Internal Audit and Risk Management in April 2011 and became Senior Vice President Audit, Compliance and Risk in January 2013. He is responsible for internal audit, compliance and ethics, risk and related advisory services for Etihad Airways and its partner companies.

Before joining Etihad Airways he was the General Auditor and Senior Director, Risk Management and Business Transformation at Air Canada.

Mr. Mohan has extensive experience in the aviation industry covering internal audit, financial planning and controls, business transformation, distribution, strategic cost management and ERM.

Mr Mohan is a CPA and a Chartered Accountant.
Throughout its tenth anniversary year, Etihad Airways continued to win major regional and global awards for its product, its strategy and its contributions.

For the fifth consecutive year, Etihad Airways was named World’s Leading Airline at the World Travel Awards.

Etihad Airways also was named Airline of the Year by the US-based Global Traveler magazine and Middle East’s Leading Airline at the World Travel Awards, Middle East.

In recognition of its performance in its home market of Abu Dhabi, Etihad Airways won the 2013 title for Excellence Entity in Leadership in the Abu Dhabi Award for Excellence in Government Performance.

The airline’s premium product, Diamond First Class, again won multiple awards, reinforcing the commitment of Etihad Airways to delivery of best-in-class service.

The President and Chief Executive Officer of Etihad Airways, James Hogan, won the Executive Leadership category at the Airline Strategy Awards, held in London, and the airline’s Chief Financial Officer, James Rigney, was named Middle East Chief Financial Officer of the Year by the Institute of Chartered Accountants of England and Wales.
AWARDS WON BY ETIHAD AIRWAYS IN 2013 INCLUDED:

WORLD TRAVEL AWARDS 2013
- World’s Leading Airline (fifth consecutive year)
- World’s Leading First Class
- World’s Leading Airline Cabin Crew

WORLD TRAVEL AWARDS MIDDLE EAST
- Middle East’s Leading Airline (seventh consecutive year)

GLOBAL TRAVELER MAGAZINE
- Airline of the Year
- Best Airline First Class
- Best Airport Lounges

GLOBAL TRAVELER MAGAZINE
- Airline of the Year
- Best Airline First Class
- Best Airport Lounges

ABU DHABI AWARD FOR EXCELLENCE IN GOVERNMENT PERFORMANCE
- Award for Excellence Entity in Leadership

AIRLINE STRATEGY AWARDS 2013
- James Hogan, Executive Leadership

INSTITUTE OF CHARTERED ACCOUNTANTS, ENGLAND & WALES
- James Rigney, Chief Financial Officer, Etihad Airways – Middle East Chief Financial Officer of the Year

SKYTRAX WORLD AIRLINE AWARDS
- Best First Class (fourth consecutive year)
- Best First Class Seats
- Best First Class Catering

INSIGHTS MIDDLE EAST CALL CENTRE AWARDS
- Etihad Airways Al Ain Call Centre – Best Facilities Award (second consecutive year)

ITALIAN ASSOCIATION OF AIRCARGO AGENTS
- Etihad Airways – Best Overall Carrier Award, 2013

ATHENS INTERNATIONAL AIRPORT AIRLINE MARKETING AWARDS 2013
- Etihad Airways – Fastest Growing Airline to Middle East (second consecutive year)

ETIHAD AIRWAYS CORPORATE AFFAIRS DEPARTMENT
- “In House Team of the Year” – Middle East Public Relations Association

AVIATION BUSINESS AWARDS
- Corporate Social Responsibility Award
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- World’s Leading Airline (fifth consecutive year)
- World’s Leading First Class
- World’s Leading Airline Cabin Crew

**GLOBAL TRAVELER MAGAZINE**
- Airline of the Year
- Best Airline First Class
- Best Airport Lounges

**ABU DHABI AWARD FOR EXCELLENCE IN GOVERNMENT PERFORMANCE**
- Award for Excellence Entity in Leadership

**AIRLINE STRATEGY AWARDS 2013**
- James Hogan, Executive Leadership

**WORLD TRAVEL AWARDS MIDDLE EAST**
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- James Rigney, Chief Financial Officer, Etihad Airways – Middle East Chief Financial Officer of the Year

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