

# Air traffic's great game

BY ALESSANDRA BRUNI



As escalating conflicts punch holes in air maps of the world, international aviation faces new risks and opportunities in high altitude geopolitics. Air traffic faces immense strain from airspace closures, mandatory rerouting, and increased traffic density that controllers have become adept to dealing with

In today's complex and unstable international environment, air traffic flows are a crucial factor, offering significant opportunities while also posing challenges.

Indeed, sustained variations in air traffic volumes are often linked to shifts – up or down – in the geopolitical and geoeconomic relevance of the areas concerned. In crisis situations – marked by conflicts, political instability, sanctions, or retaliatory measures – the impact on air traffic viability significantly affects the mobility of people and goods, exposing international supply chains to relevant vulnerabilities.

Following the outbreak of the Russia-Ukraine war in 2022, the EU closed its airspace to Russian aircraft, while Moscow responded with reciprocal bans on Western airlines. This led to a rupture in traditional Europe-Asia routes. Further conflicts and tensions affecting air traffic have emerged over the past months, for example in parts of the Middle East and Africa, as well as in the Indo-Pakistani and Venezuelan airspaces.

However, despite the turbulence of recent years – from the pandemic to international tensions and conflicts – the aviation sector has shown remarkable resilience, and global revenues and profits are expected to grow in the current year.

Against this backdrop, it is worth reflecting on opportunities in dynamic and growing regions of the world, where forecasts of rising demand for flights and air traffic – including those for 2026 – confirm the need for a more in-depth analysis.

Currently, international attention appears to be particularly focused on the so-called Indo-Pacific region. This is also evident in Italy, given the numerous strategic, political and economic initiatives that have been undertaken in the area.

Beyond the Italian context, the US National Security Strategy document published in November 2025 can be referenced. This document also highlights the

Indo-Pacific's strategic and economic importance, emphasizing the need to maintain it as "free and open", particularly with regard to commercial development and the reliability of supply chains.

Another strategically important and dynamic area that deserves close attention is the Near and Middle East, which is home to major and increasingly influential airport hubs such as Dubai, Istanbul, Doha and Riyadh.

Furthermore, opportunities for developing flight flows in growing regions such as Latin America are worth considering regardless of the prospects associated with the conclusion of the EU-Mercosur agreement.

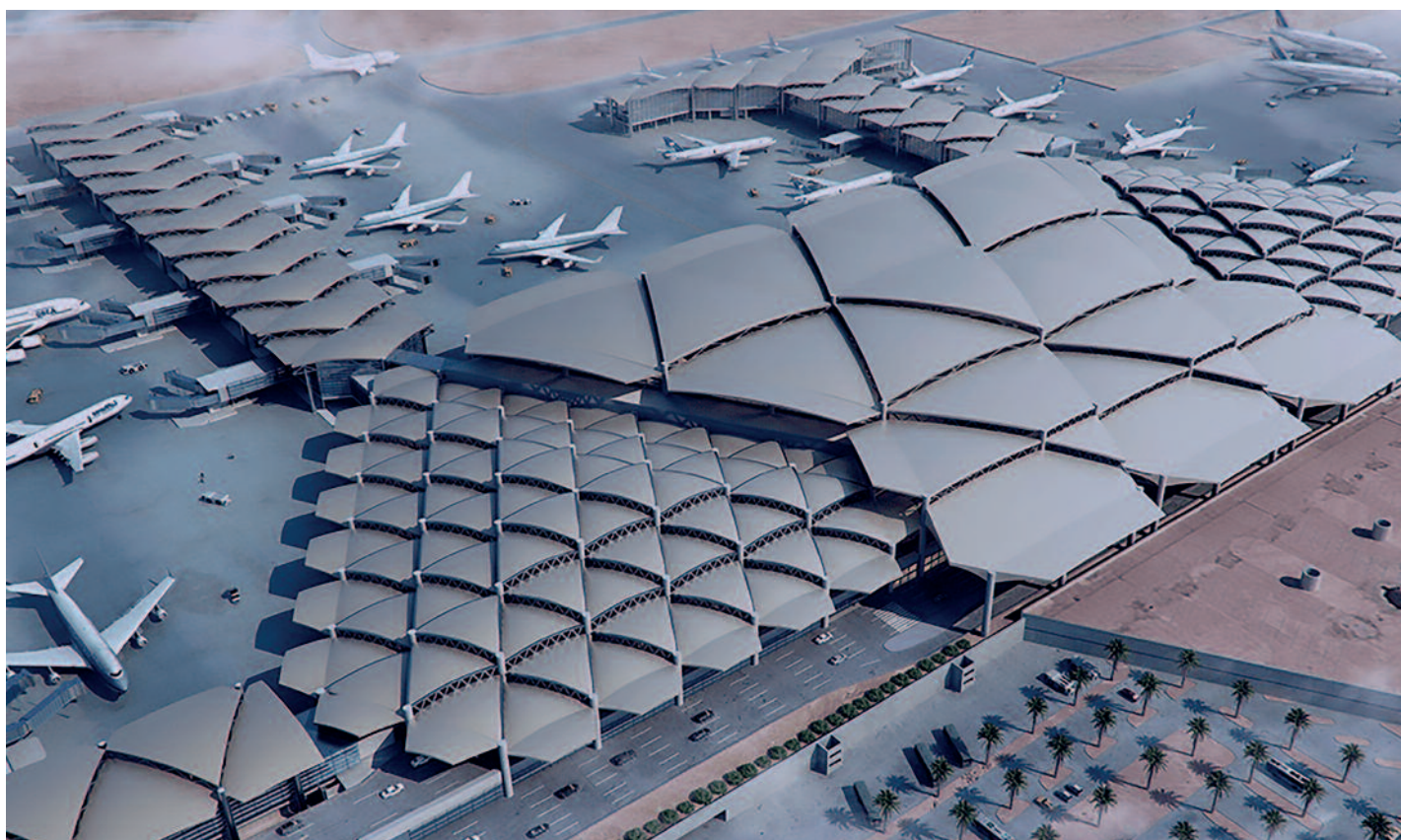
ENAV, the Italian air traffic management company that I chair, is actively considering further business opportunities in these regions. Under its 2025–2029 Industrial Plan, the company has planned to open new offices in India, Saudi Arabia, and Brazil by 2026.

As previously mentioned, the sector has demonstrated resilience in the face of recent challenges, but vigilance is still required as geopolitical factors continue to evolve, particularly in regions where their impact could lead to prolonged 'arcs of crisis', such as along Eurasian routes.

It is also essential to monitor developments in the aforementioned regions. For example, consider the US-China competition in the Indo-Pacific, conflicts and tensions in the Near and Middle East, and uncertainties in Latin America (within a broader framework than the Venezuelan case).

In general, Italy and other European countries face the significant challenge of competing with the aviation and airport sectors in non-EU contexts, especially given the close link between geopolitical and geoeconomic developments and traffic growth. Furthermore, non-Western countries that have maintained neutrality or strategic balance with regard to the Rus-

Aerial view of King Khalid International Airport.



sia-Ukraine conflict, such as China, India, Turkey and several Arab countries, have avoided the negative effects of reciprocal sanctions, including restrictions on airline operations. This has given them a competitive edge over Western carriers.

In the 'great game' of aviation, air navigation service providers also play a pivotal role. In Italy, for example, ENAV's efficiency has enabled significant volumes of air traffic to be absorbed in recent years, surpassing the peaks reached in 2019 prior to the pandemic and accommodating new flows, including those associated with route changes linked to crisis situations in Eastern Europe and the Middle East.

From a broader perspective, Italy can leverage additional factors, including its

major airport hubs, geographic position and strategic projection. Italy is a peninsula at the heart of the Mediterranean, providing an ideal gateway to the East, stretching towards the Pacific longitudes, as well as to the south and west of the globe. Italy can indeed do much more in relation to Africa, especially considering initiatives like the Mattei Plan, as well as in relation to the Americas, bearing in mind the dynamism of Latin America and the opportunities in the northern part of the continent, also through its ties with Washington.

In general, many analysts view the aviation sector as an investment area to watch closely in 2026. We share this outlook with confidence, hoping that the development opportunities inherent in re-

moving barriers and fostering global interconnection – hallmarks of air transport – may lay the foundations for a new “air-space politics”. During this delicate and complex period of global transition, this type of politics could be seen as a strategy to improve air connectivity and promote harmonization within the international framework.

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