AeroProfessional

ENGINEER SKILLS SHORTAGE

The Risk to Aviation's Future

White Paper - May 2023

PROVIDING FIRST CLASS AVIATION RECRUITMENT
SOLUTIONS TO OPERATORS ACROSS THE GLOBE

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Written by

SAM SPRULES, Managing Director (L)
ROB PARKER, Sales Manager, Engineering (R)

With thanks to our contributors

Christoph Blaha, VP Technical Services, Luxair
Igor Zahradníček, Member of the Board, Czech Airlines Technics
Frederico Marques, Talent Acquisition & HR Development Manager, Hi Fly
David Cruz, Maintenance Director, MESA

Luxair CZECH AIRLINES TECHNICS Hifly Mesa

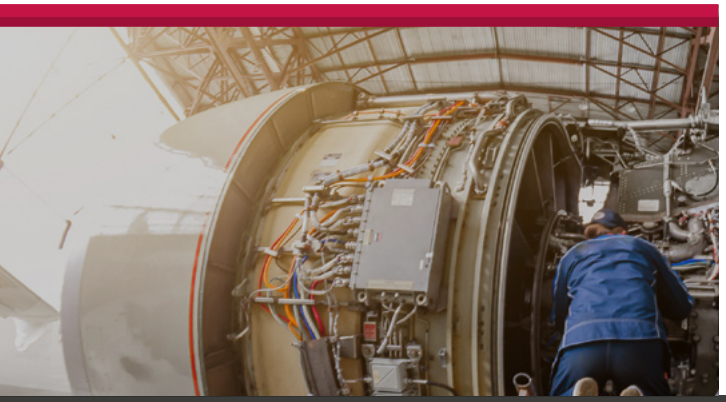
And a special thanks to our global community of aircraft engineers for their invaluable industry feedback.

INTRODUCTION

"THE SHORTAGE OF LICENSED ENGINEERS AND MECHANICS IS CREATING A QUIETER STORM BEHIND THE SCENES AS THOSE WHO MAINTAIN, REPAIR AND OVERHAUL AIRCRAFT DEAL WITH THEIR OWN WORKFORCE CHALLENGES

The shortage of skilled aviation professionals has been widely documented over the past decade, with many discussions around industry challenges placing forecasts for 'demand outstripping supply' at the front and centre of the conversation. Even prior to that, 2009 saw the International Civil Aviation Organisation (ICAO) establish the Next Generation of Aviation Professionals Taskforce[1] in a bid to address the challenges posed by the anticipated shortage of skilled aviation professionals.

Fast forward to 2023 and, even in the wake of a global pandemic that caused such extensive devastation and disruption to the industry, resulting in mass redundancies across the sector, the conversation remains unchanged. In fact, it appears to have only intensified as flight cancellations and delays dominate the headlines. In 2022 the airlines faced continued difficulties in meeting demand, causing widespread reputational damage amid the challenges of rebuilding their post COVID-19 operations, and passenger frustration was clear as they faced further disruption during a time when travel was theoretically back on the agenda.



With the pilot skills shortage remaining a hot topic in the industry, it becomes easy to overlook other key labour shortages. But they most definitely do exist. One of the professions that has the ability to create equal, if not more instability to aviation is the shortage of licensed engineers. But with empty cockpits so highly evident as a future threat, are we paying enough attention to a labour shortage that could be so very critical to the industry's future?

The shortage of licensed engineers and mechanics is creating a quieter storm behind the scenes as those who maintain, repair and overhaul aircraft are dealing with their own workforce challenges, with demand significantly outstripping supply. The shortage is here to stay and, as current forecasts show, likely worsen over the next decade. The potential result? Fewer available flights and more delays and cancellations.

"As Luxair increases its fleet and moves to a new hangar with extended possibilities, struggling to retain existing and recruit new staff is the biggest obstacle to facilitating the growth of our airline from a maintenance perspective." Christoph Blaha, VP Technical Services, Luxair

So what's causing the engineering skill gap? What is being done about it? How will it impact aviation's future and what are the potential solutions?

In this white paper, AeroProfessional delves into the engineering shortage, discussing the causes, challenges and impacts to aviation, and looking at the array of actions that could be taken to mitigate the inevitable.

WHAT'S CAUSING THE ENGINEERING SHORTFALL?

The imbalance between supply and demand can be traced back to a multitude of root causes, most of which are not too dissimilar to those we see in other aviation professions. The impact of COVID-19 cannot be ignored, but the anticipated engineering shortage stems from well before the pandemic, with the global crisis only serving to exacerbate an already growing concern.

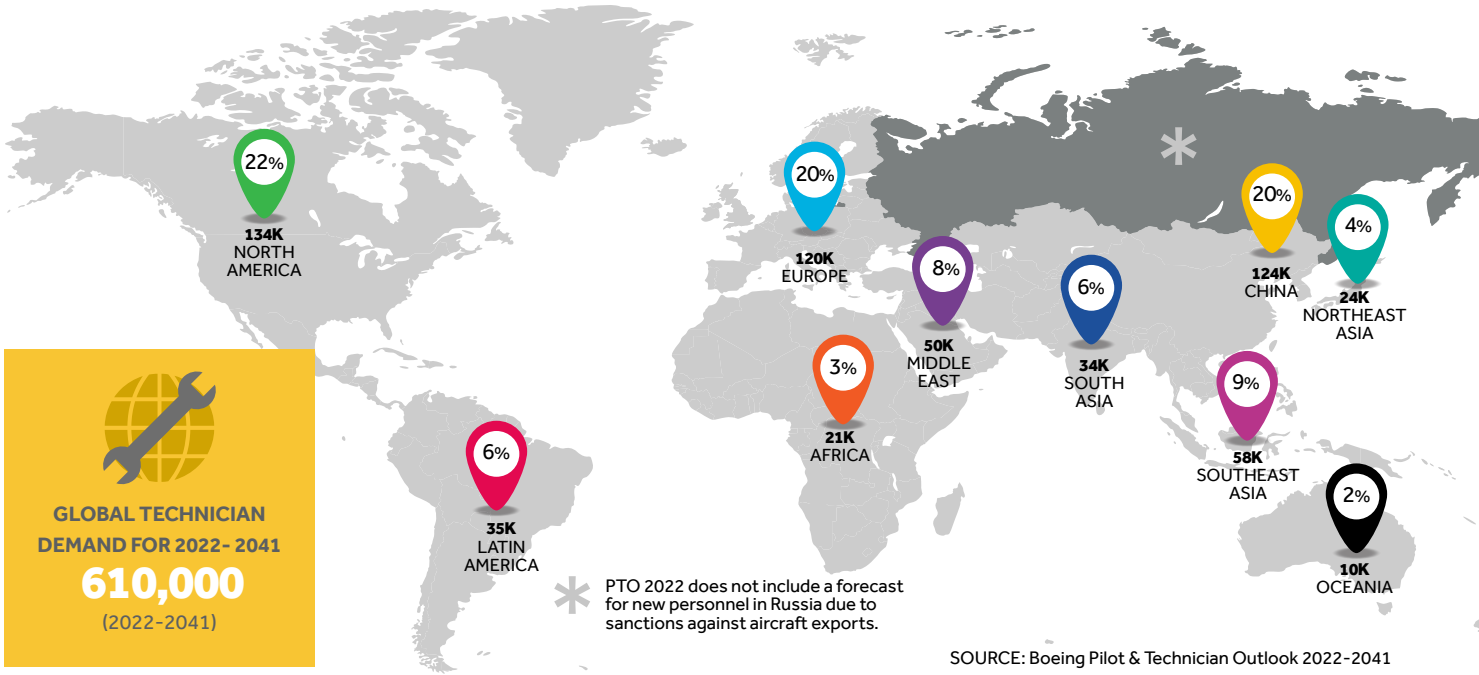
"ALMOST 20% OF NEW GLOBAL TECHNICIAN DEMAND WILL BE REQUIRED IN THE EUROPEAN REGION

Increasing demand

Testament to aviation's resiliency, the industry is recovering at speed and is expected to return to pre-pandemic levels on a global scale between 2023 - 2025.

For the aviation engineering, mechanical and technical workforce, the future outlook looks extremely positive. Boeing[2] projects that 610,000 new technicians will be required to maintain the global aviation fleet over the next 20 years, with the combination of growth, attrition and replacement continuing to drive high demand. It's anticipated that 19.7% of those will be required in the European region, which is surpassed marginally only by North America (22%) and China (20%).

NEW PERSONNEL DEMAND: TECHNICIANS



SOURCE: Boeing Pilot & Technician Outlook 2022-2041

Similarly, with Airbus[3] forecasting that the number of passengers will double to reach more than 9 million by 2041, they project that more than 2 million new personnel will be required to meet future demand. New technicians account for 34% of this number, so over a third. In both cases, each OEM is forecasting the demand for engineers will be higher than that of pilots.

It's clear the industry is once again booming with a hugely positive future outlook. The labour shortage issue, therefore, is driven by the unprecedented rapid speed of recovery coupled with significant future demand. Both of which place such huge pressure on an industry that was mostly 'out of action' during COVID-19. The pre-existing workforce challenges, paired with the ramifications of the pandemic, means there simply aren't enough people to do the work.

FORECAST BY 2041...

9 Million PASSENGERS

A PREDICTED INCREASE OF MORE THAN DOUBLE

2 Million

NEW PERSONNEL

WILL BE REQUIRED TO MEET FUTURE DEMAND

34%

OF THIS NUMBER NEED TO BE NEW TECHNICIANS

SOURCE: Airbus

> **61% FEEL ATTRACTING & RETAINING SKILLED LABOUR WILL BE THE BIGGEST FUTURE CHALLENGE**

Igor Zahradníček, Member of the Board at Czech Airlines Technics comments: ***"We are in close contact with schools and universities with relevant studying programs, but training MRO experts is a long distance run. Thanks to the COVID-19 period we are, of course, lacking colleagues in such programs."***

In a poll conducted by AeroProfessional in March 2023, we asked our network of aviation professionals and leaders what they thought would be the greatest challenge for airlines over the next five years. The result was that a staggering 61% of respondents felt that attracting and retaining skilled labour would be the biggest future challenge. With five years being the very near future, rather than a distant 'might happen, might not', the time for taking action is imminent.

Whilst this question wasn't aimed specifically at engineers, it's clear that the pipeline of qualified personnel (including Maintenance, Repair and Overhaul (MRO) professionals) needs addressing.

What's more, we can see the same trends forming in our own data. In 2019 technical and engineering-based roles accounted for 18.4% of total client requirements throughout the year, in sharp contrast to 2022 which saw this role-type account for 37.4% of total vacancies.

"We are competing with other employers who are in the same position, because this is the general situation on the market. The demand is there and we would be working on more projects if capacity allowed for it. Unfortunately we anticipate that this will get worse before it gets better." Zahradníček adds.

Licensed engineers remain so critical to the safety and prosperity of the aviation ecosystem. So where are they?

An aging workforce

In 2017 the average age of aircraft maintenance engineers and mechanics in Europe was c.40 years, and in the US, it was c.51 years of age[4]. If we consider the number of engineers who then took early retirement during the pandemic, we could be looking at as much as a third of the current workforce swiftly approaching retirement age.

> **YOUNG TALENT MAY THINK TWICE ABOUT PURSUING A CAREER WITH SUCH PERCEIVED INSTABILITY**

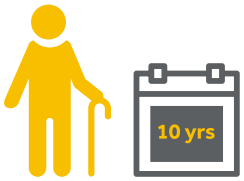
As the Baby Boomers (1946-1964) start exiting the workforce, the Gen Zers (1997-2012) are failing to replace them in numbers great enough to offset the shortage. Equally, the pandemic had a particularly negative effect on employee attrition, seeing many people switch to alternative careers or industries which provided a more secure career environment. The next generation are only too aware of the dramatic impact the sector suffered at the hands of the pandemic, and the strength of the industry will be a question mark in their mind. In a recent survey by AeroProfessional, 73% of respondents from our engineering community stated that they felt COVID-19 had negatively impacted younger people from pursuing aviation roles. It seems young talent may think twice about pursuing a career with such perceived instability.

"The industry and governments need to open the industry to new people. More training & apprenticeships need to be put in place. More attractive salaries are needed. It's a hard, manual job which requires skill & effort to achieve daily goals. I don't think it appeals to the younger generation."
B1/B2 Engineer, Europe

Additionally, the next generation are accustomed to an 'instant' culture. They want immediate information, experiences and results. When this is so characteristic of Gen Zers, it's hardly surprising that rapid wealth and success are not only desired, but expected. But if we take this attribute and place it next to an engineering career path, which is so regulated that it takes an additional 5-8 years of required education, it's clear there is a significant gap in the expectations from either side.

AEROPROFESSIONAL SURVEY, APRIL 2023, 394 AIRCRAFT ENGINEERS:

27%
EXPECT TO RETIRE WITHIN THE NEXT 10 YEARS



60%
DON'T FEEL THE INDUSTRY DOES ENOUGH TO ATTRACT YOUNG PEOPLE TO AIRCRAFT ENGINEERING

73%
BELIEVE COVID-19 NEGATIVELY IMPACTED YOUNGER PEOPLE FROM PURSUING AVIATION CAREERS

Untapped resource

Along with the aging workforce, diversity continues to be an issue that the industry is not yet fully addressing. Most engineers and mechanics are white and male, with little representation from minority groups. For example, Women in Aviation International reports that as little as 2.6% of aviation engineers are women[5]. Whereas globally, 16.5% of those working in engineering-related roles are women. Whilst still a very low number, the disparity is evident.

Attractive alternative Industries

The expectation to meet a huge number of requirements on time and on budget, where the risk of mistakes could lead to catastrophic consequences, means there's no escaping the fact that working as an aircraft engineer is stressful.

Salaries for licensed engineers vary greatly depending on the specific role, company and regional fluctuations, but the competition from other industries could offer lucrative alternatives, with better pay and reduced high-stress conditions.

"AS LITTLE AS 2.6% OF AVIATION ENGINEERS ARE WOMEN

In AeroProfessional's recent survey, 56% of respondents stated that they didn't feel they were getting paid enough for the job expectations. So, as we have seen in the past with the rail, automotive and oil & gas industries hiring licensed engineers from aviation, we now see pharmaceutical, defence & security, marine, and tech-based roles offering attractive options, resulting in the loss of already qualified and experienced engineers from the sector.

Aviation engineers are highly trained and qualified individuals and while much of their knowledge is aviation specific, they hold a significant amount of transferable skill as well. While any new technical role will require re-training, this type of talent pool will easily adapt, by being able to apply and leverage a range of perfected soft skills such as practical thinking, data analysis and problem solving.

CONSIDERING ROLES IN ALTERNATIVE INDUSTRIES

In a survey conducted in April 2023, AeroProfessional asked its network of aircraft engineers how likely they would be to consider a role in an alternative industry to aviation, with nearly half of respondents stating that they would consider switching industries.

45%

ALARMINGLY SAID THEY WOULD EITHER BE 'LIKELY' OR VERY LIKELY' TO CONSIDER A ROLE IN AN ALTERNATIVE INDUSTRY

Brexit

For UK aviation specifically, the skills shortage continues to be exacerbated by the country's departure from the European Union (EU) in January 2020. The move saw existing bilateral agreements eradicated, with licenses issued by UK authorities no longer valid or recognised in the EU, and vice versa.

"EASA exit has caused great disruption and a negative effect on UK aviation. Bilateral licensing recognition needs to happen as soon as possible." B1/B2 Engineer, Europe

The Brexit-related political obstacles mean UK aviation businesses have very restricted access to engineers from European countries. When that's combined with increased workforce challenges in the wake of the pandemic, with both crises hitting the industry in the same timeframe, the skills shortage and the need for new talent are more critical than ever for UK aviation.

Training troubles

> **AIRLINES ARE HAVING TO CONTEND NOT ONLY WITH A TIGHT LABOUR MARKET, BUT WITH SIGNIFICANT TRAINING BOTTLENECKS**

The industry is desperate for more engineers in order to keep planes flying, but as with other aviation disciplines, airlines are having to contend not only with a tight labour market, but with significant training bottlenecks. There simply isn't the capacity to train engineers at a level that would combat the shortage. And of course, even if this obstruction were to be resolved, the industry still may not see the pipeline of future engineers coming through to fulfil those hypothetical spaces.

Qualifying is costly and intensive, and whilst other industries have adapted to meet new learning styles for the next generation, the methodologies in engineering qualifications haven't evolved at the same pace. Currently, it takes an average of 2 years to complete the modules for a B1 licence, with an additional 2-5 years of practical experience before the licence can be applied for. After which time, a type rating must be secured along with more practical training. The process is long and costly, and means the speed of entering the industry is a lot slower than the expected speed of looming retirements.

"Training is an ongoing concern in the industry, with a young and inexperienced workforce constantly being asked to perform and deliver above their current capabilities" says Frederico Marques, Talent Acquisition & HR Development Manager at Hi Fly, ***"We need time for the new ones that we have to become experienced. We also need to be able to hold them for long enough that they're able to train new generations who are willing to come and work in this industry."***

Taking into consideration the length of time it takes to become a licensed engineer, along with a lack of training capacity and deficient progression in learning methods, and it's clear that reducing the gap will take a lot of work.

"There is clearly significant disparity in the numbers. What the industry expects to lose in the coming years versus the flow of new talent coming in is a huge problem, let alone the need for additional engineering capacity to make anticipated industry growth possible. The ability to tackle this issue is further compounded by training cutbacks made during the pandemic, meaning not only is there attrition and growth to address, but also a 2+ year training stop gap to fill." Sam Sprules, Managing Director, AeroProfessional

WILL THE SHORTAGE RESOLVE ITSELF?

According to the Airbus Global Market Report 2022-2041, only 20% of the current service fleet is the latest generation of fuel efficient aircraft[2]. With oil prices rising and ongoing significant pressure on the industry to decarbonise, the focus on aircraft replacements will see 40% of the current global fleet replaced by 2041.

> **OLDER AIRCRAFT REQUIRE MORE MAINTENANCE AND REPAIRS - NEWER AIRCRAFT WILL ALLEVIATE THIS FOR A TIME, BUT THE SAME PROBLEM WILL RECUR IN FUTURE**

Older aircraft require more maintenance and repairs, and usually have shorter intervals between larger maintenance jobs. The result of such levels of re-fleeting could see MRO demand start to stabilise towards 2040 as the older maintenance-intensive models are replaced with newer aircraft.

Although this places the problem very much in the here and now, when older generation aircraft still account for such high numbers of the total global fleet, it cannot be assumed that a future stabilisation in demand will alleviate the long-term issue. The problem will only present itself again as the newer generation aircraft mature in service.

Along with other aviation professions, the engineers shortage will only completely resolve itself if clear and definitive action is taken now. So what action is needed?

HOW COULD THE ISSUE BE SOLVED FOR THE LONG-TERM?

We know that the shortage of aviation engineers is not a problem that will be solved overnight, nor is it one that will solve itself. The attraction of new talent, and the retention of the existing workforce, are crucial components for long-term resolution. But what plans could be put in place now to protect the industry's future?

Invest in the younger generation

> **"AN OVERHAUL IN THE INDUSTRY'S PERCEIVED CULTURE COULD HELP ATTRACT YOUNGER PEOPLE INTO CONSIDERING IT AS A CAREER OPTION**

Aerospace engineering is a highly rewarding and interesting industry to be in, so it shouldn't be challenging to gain a steady pipeline of future talent. But the younger generation are not gaining exposure to this career path from an early age. They just don't know enough about it.

As with many other specialist careers, it would be beneficial for school-goers to gain a firm understanding of the occupation through energised learning, role models, and even site visits and internships. By gaining that full understanding, it will help younger students to see the value in engineering and see it as an exciting future career option.

Better coordination between the industry, educational institutions and governments would help to raise awareness of aviation for the next generation and encourage programmes aimed more towards STEM-focused (Science, Technology, Engineering and Maths) careers like aerospace engineering.

Similarly, an overhaul in the industry's perceived culture could help attract younger people in to considering it as a career option. Gen Zers, often dubbed 'Generation Influencers', absorb information and content through a whole new set of mediums, with social channels and influencers at the core of their preferred media. Tapping into these media streams is key to engaging with this audience and demonstrating that aviation is far from an 'old fashioned' choice.

This generation also shows the most concern for the environment and future sustainability of the planet, already demonstrating huge preference for shopping sustainable brands[6]. As with influencing their buying decisions, it too could impact their future career

choice. Whilst those within the industry will know only too well about aviation's commitment to decarbonise and achieve net zero by 2050, it's worth considering how well this is communicated to the next generation. They will most likely be aware of the stigma around aviation's carbon footprint, but unless the industry's plans are better articulated to this sustainability-conscious audience, we may find that they're not just shunning flying by aircraft in the future, but working on them too. Addressing this subject now and communicating it effectively through the channels the next generation are most aligned with, is key to alleviating this growing concern.

Likewise, with the younger generation growing up in a world that uses technology as part of everyday life, they will expect their career to incorporate the use of new and innovative techniques and methods. By incorporating technology such as artificial intelligence and virtual reality in to training programmes it would help make the occupation more engaging and appealing for the next generation, as well as potentially streamlining or even reducing the time for a licensed engineer to become fully qualified and operational.

"Companies need to adapt to new learning styles of young generations to succeed. Digitization being the corner stone." QA Maintenance Director, Asia

Widen the pool

As with tapping into the future talent by engaging with a younger audience, the industry needs to extend its reach to a more diverse range of employees and attract them in to engineering roles in aviation.

A 2017 study from Microsoft[7] found that one of the main reasons girls choose not to follow careers in STEM is because they lack a female role model. With Maintenance Technicians being the most underrepresented profession according to Women in Aviation: A Workforce Report 2021[8], it's clear that underlying problems in gender equality must be addressed and that the industry must continue to seek ways to keep building awareness and encourage female talent in to the industry.

METHODS TO ATTRACT YOUNGER PEOPLE INTO ENGINEERING ROLES IN AVIATION

In April 2023, AeroProfessional asked its network of aircraft engineers their thoughts on methods to attract younger people. The results demonstrate clearly that a blend of methods are needed to tackle this critical area, but with a predominant focus on widening the availability of apprenticeship programs.

38%
INCREASE AVAILABILITY OF APPROVED APPRENTICESHIPS

28%
INTRODUCE & PROMOTE IT EARLIER IN EDUCATION

27%
ADAPT TRAINING FOR YOUNGER LEARNING STYLES

7%
SUGGESTED A COMBINATION OF THESE IDEAS

The British Airways initiative[9], which profiles the careers of a range of their employees, demonstrates the power behind industry role models, particularly when they are speaking specifically about their experiences of working in a male-dominated field. Better visibility of these role models is critical for the attraction of female and minority groups.

The Introduction of role models into the education system is just one of the ways the industry could start appealing to these underrepresented groups at an early age, and help break down the barriers and perceived cultures that have historically characterised aviation.

Retain existing workforce

The shortage is already seeing wages increase and this will most likely continue in a upwards curve, which ultimately makes the profession more appealing for both new entrants and the existing workforce. But as important a deciding factor as it is, increasing pay is only one aspect that can impact retention rates. When we're seeing a large number of licensed engineers defecting from the industry altogether, or moving to a different country or continent with prospects of better growth, culture and environment, retaining talent should be an absolute priority.

Engineers rarely opt for the profession based on salary alone. In fact, the post-COVID world has seen more and more engineers make the move from contracting to permanent positions in a bid to achieve more stability. The focus on salary has become less important than the focus on a career that provides them with a stable and progressive future. As part of this, providing clear routes for continued growth through additional training, mentoring, management programs and leadership options will help to instil a culture where engineers have a clear understanding of their professional development that goes beyond their 'day job'.

"In most firms there is not enough done to help engineers further their career. Time needs to be put aside for engineers to perform tasks that they need to gain experience in." B1/B2 Engineer, Europe

In addition, it's clear that the pandemic caused a shift in work-life-balance across all industries, and all professions, with aircraft engineers being no exception. As a result, some organisations are starting to adopt a rotation basis for engineers that is not too dissimilar to a pilot's. If more organisations considered this as a future option, then they may find they're giving engineers the work-life-balance they're looking for, and potentially reduce employee attrition as a result.

Efficiency is also a key focus for organisations given the workforce shortage, and this could be placing pressure on existing personnel who will feel that they are being held accountable for the current challenges

the industry is facing. It's important, therefore, to ensure that the existing workforce is taken on the journey with the organisation, that they feel part of it and have a sense of ownership in any systems introduced to enhance efficiency and output.

Improve training

> **"THE SPOTLIGHT NEEDS TO SHINE FIRMLY ON THE EMBRACING OF NEW TECHNOLOGY IN THE SECTOR**

We know that there is a need to create a strong pipeline of future engineers to respond to demand on a global scale. But what happens when that pipeline is realised, when we also know that training capacity is another widespread issue?

This is where the collective industry could step in to support future talent and ease training bottlenecks. A number of larger carriers, OEMs and MRO organisations do already offer apprenticeship schemes, offering the ability to work in world-renowned organisations while training to achieve recognised qualifications in the aerospace industry, but there aren't enough supporting this route to handle the capacity needed.

Earlier this year, we saw Qantas launch its own Engineering Academy[10] in a bid to combat an impending shortage. The move will also see them work with the industry and unions to encourage more women in to the pipeline.

If more organisations adopted a similar route in the future, and worked with the industry and governments to place a spotlight on them for the next generation, we could see training holdups ease significantly.

Equally, we've talked about the perception of aviation being considered an out-dated industry for younger people. So we know that the spotlight needs to shine firmly on the embracing of new technology in the sector. As the next generation of aircraft start taking to the skies, the training required to upskill technicians to maintain them must also evolve. As with other areas of the aviation industry that require highly qualified individuals, it is vital to seek out ways of improving the efficiency and efficacy of the training process; reducing timescales while maintaining the quality. If the industry can move to support new cutting-edge training mechanisms and champion differing learning styles and techniques in its delivery, then we could see a steady pipeline of future talent ready to fulfil those expanded apprenticeship slots.

"[We need to] present the industry as cutting edge. As it was once, aviation again needs to be where one goes to become the engineer every industry wants. From there the industry will perpetuate itself."
Maintenance Manager, Europe

THE BOTTOM LINE

In AeroProfessional's April 2023 survey, we saw 75% of respondents stating that they would be 'likely' or 'very likely' to recommend a career in aircraft engineering to others. With such passion and positive sentiment from within the industry itself, it seems the primary problem is clear: careers in aviation engineering are just not attractive to wide enough pool of people yet.

"WITH THE NEXT GENERATION SEEMINGLY RELUCTANT TO ENTER AIRCRAFT ENGINEERING, COUPLED WITH THE LOOMING RETIREMENTS OF CURRENT LICENSED ENGINEERS AND COMPETITION FROM OTHER SECTORS FOR SKILLED EMPLOYEES, AN ENGINEERING SHORTAGE IS INEVITABLE.

David Cruz, Maintenance Director at MESA comments: ***"Increasing demands continue to drive business and work conditions need to adjust to the needs. It will get better if the industry can once again be regarded as a valuable option for young engineers, with new projects to attract and retain the existing ones."***

With the next generation seemingly so reluctant to enter aircraft engineering, coupled with the looming retirements of current licensed engineers and the competition from other sectors for skilled employees, it's clear an engineering shortage is inevitable.

The decreasing popularity must be addressed and the pool of potential candidates must be widened in order

to mitigate the problem for the long-term. Change needs to happen now to protect aviation's future and keep aircraft in the skies. The future demand necessitates it.

"It will take a concerted effort on behalf of MROs, airlines and other key stakeholders to attract more talent into the sector and future proof what is currently a woefully underfilled qualified engineer pipeline. This will take significant planning and not least of all investment in all forms; time, money, resources.

The shortage is already taking its toll on engineers within the industry, and could have a drastic impact on the profitability of airlines if concrete plans aren't implemented soon.

Airlines can choose between a whole host of options – either individually or a combination – to alleviate this skills shortage. But, the bottom line is that they will have to get back to investing in attracting new talent at grass roots, integrating an ongoing selection process and then streamlining training if they are to avoid watching their aircraft sit empty on the tarmac.

With the ongoing need to secure the best aviation talent, AeroProfessional can support you right now, helping to fine-tune your recruitment strategy and optimise staffing levels" Sam Sprules, Managing Director, AeroProfessional

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t +44 (0) 1252 750 400
e team@aeroprofessional.com
w aeroprofessional.com

AeroProfessional Limited, 33 Hercules Way, Farnborough, Hampshire, GU14 6UU

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