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to represent, lead and serve the airline industry

IATA: Trade Association of Airlines

- **7 260 Member Airlines**
- **7** Representing 83% of scheduled global air transport
- **7** Members in India: Air India, Jet Airways, Jet Lite

IATA's Mission:
To represent, lead and serve the airline industry
Represent airlines' interests to governments & international organizations

Assist the airlines in developing solutions to the issues affecting efficient operations



- Need Statement, IATA Growth predictions, Testimonies
- Lessons learned in other growing Aviation markets, impacts
- Strategy for decade ahead for Indian Sub-Continent
- Flexible Use of Aviation Infrastructure
- Bridging Gaps: Issues and best practices
- Rocket launches
- User Expectations: Low Hanging Fruits (Discussions)



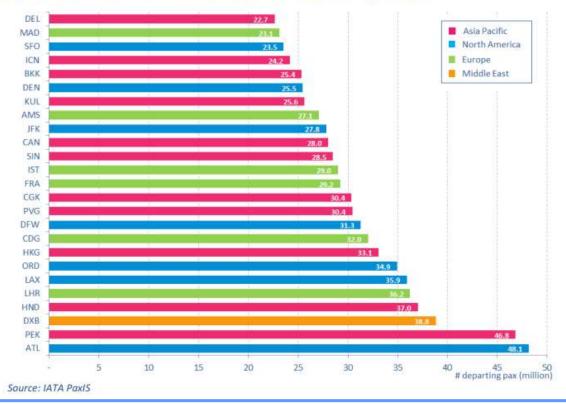
Need Statement, IATA Growth Predictions and Testimonies



AVIATION'S CG : EASTWARD SHIEFT

01 APRIL 2016

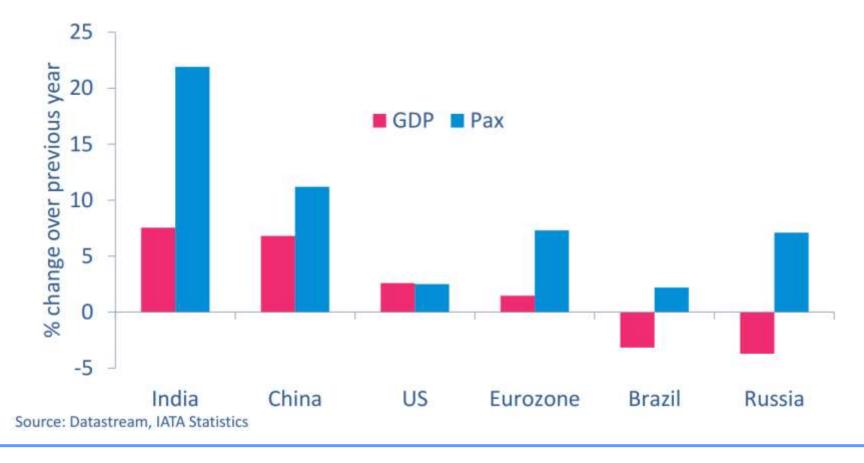
DEPARTING PASSENGERS – 2015 AIRPORT RANKINGS



Biggest mover is shared by Delhi and Shanghai, both have risen 9 places to #25 and #11, respectively.

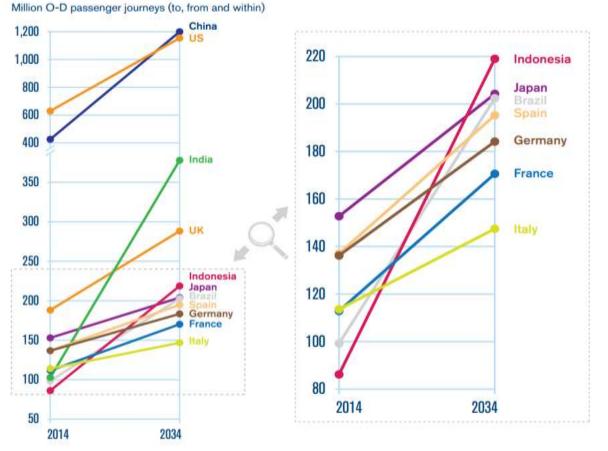


Economic and Passenger growth in 2015





Top Ten Passenger Markets



INDIA

India will displace the United Kingdom as the third-largest market in 2026,



Lessons Learned in other Growing Aviation Markets



Lessons from Growing Aviation Markets

- ↗ World's Busiest airports are able to maintain OTP ranking,
- ↗ By and large in ASPAC : No secret that delays are a major issue,
 - For airlines hub and spoke systems the enormous costs of delays are a major concern.
 - ↗ For passengers they are a major frustration.
 - For the economy they are a drain on productivity due to wasted time, missed meetings and trips foregone.
- ↗ In Adverse Weather performance drops exponentially,
- Optimum utilization of Airspace is a Key factor



Strategy for the decade ahead in Indian Sub-Continent



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Safety		Schedules Integrity & Network Connectivity		Enhancing Airspace Utilization		Infrastructure Development		Regulatory Process



- > ATM Services delivery, Performance
- PBN development and ATS route network review
- Predictable and Consistent ATC Service delivery
- ↗ Flexible Use of Airspace
- Efficiently managing Adverse Weather Ops
- Developing Allies for seamless ATM
- ↗ ATS route network review
- ↗ PBN (Enroute, TMA, APCH)
- **7** Higher FL UPR implementation

Enhancing Airspace Utilisation



Pace of Infrastructure development complementing Growth aspirations of Industry:

- Enhancing connectivity across India to the World
- Collaborative approach for Infra developments involving Airports, Airlines, ATM and Ground handling agencies.
- Flexible Use of Aviation Infrastructure: Availability of Mil Airfields as plannable destination alternates.

Infrastructure Development



Bridging Gaps : Issues and Best Practices



Civilian and Military cooperation

Partnerships for Operational Safety & Efficiency enhancement:

- Flexible Use of Aviation Infrastructure:
 - ↗ Data Driven Pro Active approach
 - Effective Diversion Management
 - > Situation Assessment & Decision
- Airspace Capacity Enhancement:
 - ↗ More efficient use of existing capacity
 - Process flexibility
 - Improvement in predictability
 - Adverse Weather Operations





Destination Alternates

- ↗ Statutory Requirement,
 - Suitable but Distant Alternates
- **Near by Alternates: Mil Airfields**
 - ↗ Aeronautical DATA??
 - ↗ Infra Downgraded?? (RFF)
 - **Within City Alternates**
- ↗ Success story begins: Nasik-Ozar



Flexible Use of Aviation Infrastructure

- → SAFETY Enhancement
 - ↗ Single RWY airports,
 - Airport demand/Capacity balancing,
 - Efficient Diversion Management
 - Situation Assessment & Decision



Land at the Next Suitable Airport

LAND ASAP

Access Seriousness & consider selection of a suitable airport



Flexible Use of Aviation Infrastructure

OPS Efficiency Enhancement:

DSTN	ALT	ALT FUEL (K	(g)
		B747-400	B777-300
Mumbai	Ahmadabad	9800	6700
	Pune	4500	3100
	Nasik- Ozar	6200	4300

Δ Fuel for Long haul flights ≈ 300Kg / 1000Kg

- **7** 50% Less ALT FUEL \implies Less \triangle Fuel & CO2 Emissions
- Increase Revenue
 Increase Revenue \square
- Reduce disruption to passengers



Indian Subcontinent @ gateway for ASPAC, MENA, AFI

India OPS	Avg Share
Dom (Arr + Dep)	46%
Intl (Arr + Dep)	22%
Intl Overflying	31%

Airspace constraints:

- Large Airspace permanently reserved for Mil,
- Restricted usage of "W" routes for Intl flights,
- Southern Indian airports not connected to Northern Intl AWY network,



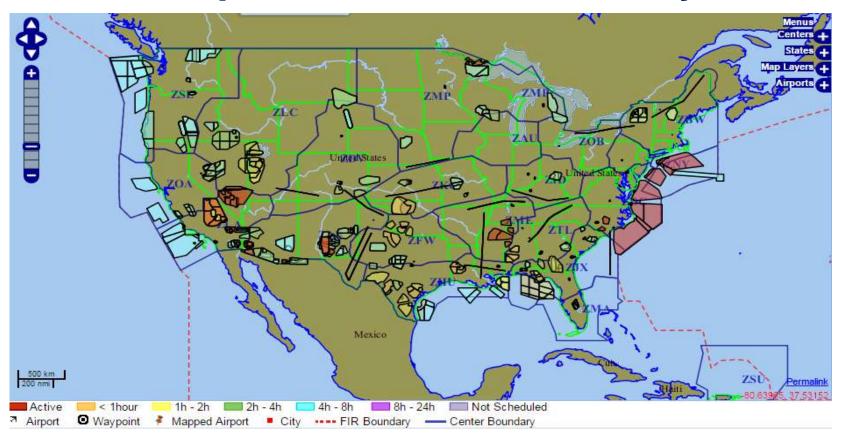
More efficient use of existing capacity

Airspace constraints:

- Crossing Air Traffic Flows (Overflying East West flow, DOM North South Flow),
- ↗ Bottlenecks due to Limited Entry/Exit points,
- Limited Airway Network and FL availability over Afghanistan and neighboring FIRs,
- ↗ Demand growth will continue.....
- ↗ Need to balance it by Capacity enhancement
 - Performance based Navigation (PBN)
- ↗ Airspace ???



Airspace: Process flexibility



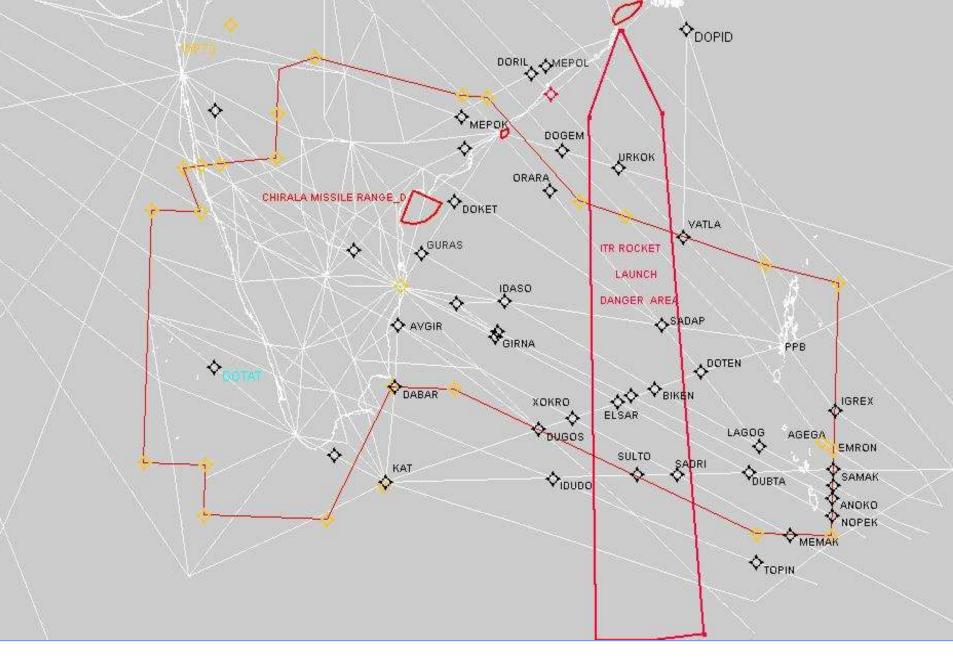


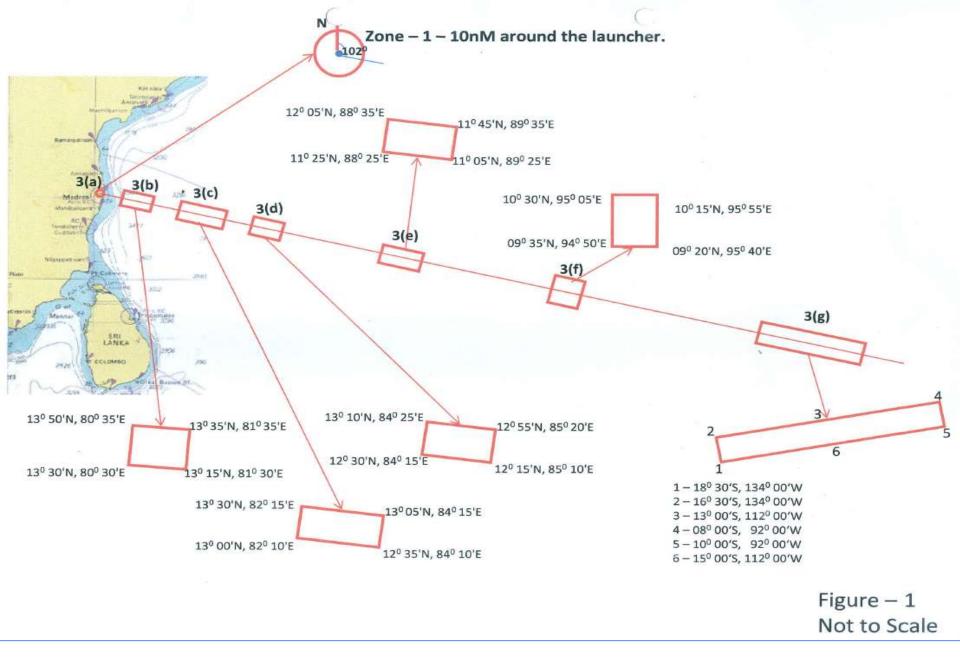
Improving predictability

Predictable	Airspace Availability / Restrictions for / due to				
Time Table basis	↗ Seasonal Adverse Weather Operations Plan,				
	Ceremonial Fly Past and practice sessions,				
	Major Mil Exercises.				
AIRAC cycle basis	Airspace Closures for Firing practice,				
	Routine Mil Exercises,				
72 Hrs Advance Notice	Routine Practice.				
Short Notice	Dynamic enroute Wx				









27



- ↗ Impact on airlines:
 - → Flight schedules;
 - ↗ Network Operations (i.e. flight connections);
 - Overflying clearances (obtain necessary overflying clearances from additional countries that would be overflown for alternate routes avoiding the danger areas).
- Mitigation: Advance intimation and timely co-ordination



- ↗ Affects large portions of airspace across different FIRs,
- Launch Windows: Typically a launch gets over within a window of 30 minutes. But airspace is usually closed by NOTAM for four to eight hours,
- Launch Timing: The launch timing windows need to be set outside busy traffic hours,
- Launch Cancellations: Information about launch cancellations on specific days may not get disseminated in time,
- Opening of airspace post launch: Frequently, NOTAMs are not cancelled immediately by <u>all</u> affected FIRs,
- ↗ NOTAMs to be issues with appropriate Series and Codes.



Each launch means additional cost to airlines due to:

- Cost of additional airborne time (fuel burn, maintenance, Crew etc.) for flying longer alternate routes;
- Cost of delays (disturbance to flight schedules and network operations, missing connections, passenger hotel accommodation etc.);
 - IATA has reports from member airlines that these costs can exceed USD250,000 for each launch.



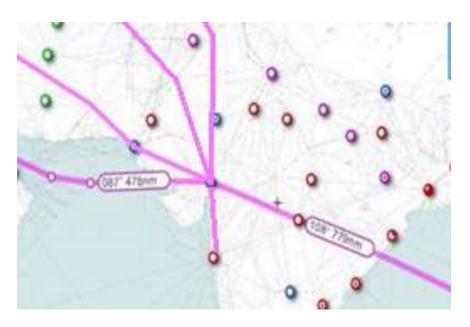
User Expectations : Let's Identify Low hanging fruits



- Launch timings: Set up in co-ordination with ATC, ensuring minimal impact on aircraft movement,
- ↗ Launch Window: Curtailing it to minimum required,
- Improved Co-ordination: The impact of large airspace closures can be reduced by enhancing co-ordination among the stakeholders,
- Provide Update: Consider Issuing NOTAM for beginning of count down and estimated Lift Off, estimated Launch Over, Flights expected to operate beyond launch over estimate can flight plan normal routes?
- ↗ Immediately withdrawal of NOTAM as soon as the launch gets over,



Flexible Use of Airspace



- BOB-AS-ICO Connectivity: RASKI – AAE- NNP – L301N
- Mumbai North America, Europe: BBB-AAE-VIKIT/TIGER/GUGAL
- Delhi Europe (Day Time): BUTOP – GUGAL
- Delhi Kolkata FIRs: M875, L509 Day time CDR2
- CDR2 routes in Kalaikunda airspace: During Rocket launches



Plannable Destination Alternates

- ↗ Agra Airbase as an alternate for IGI Delhi airport,
- Pune Airbase base as an alternate for CSI Mumbai airport,
- Navy airbases at Arakkonam and Cochin as alternates for Chennai and Cochin civil airports,
- ↗ HAL Bangalore as an alternate for Bangalore civil airport,



Air Defense Clearance (ADC)

- 3. All flights shall obtain Air Defense Clearance before entering ADIZ from respective FIC ten minutes prior to entering Indian Airspace.
- COMM Coverage issues for seeking Clearance prior entering Indian FIRs,
- DEP ADC process improved for Scheduled flights, but still issues for Non Scheduled operators, Charter and Ferry flights,
- Entire Data is shared by Civil ATC to Mil; time to review these requirements?
- ↗ Is ADC required anymore?
- ↗ Can we relieve airlines from this process??

Mumbaí Airport COLLABORATIVE DECISION MAKING



Welcome to ACDM Mumbai.

	TSAT for Departures Displayed Data captured at 2016-05-12 12:09 Z						R	Refresh		
Show 50 T ent	tries				Search:					
Callsign ≎	Dest ≎	SOBT ¢	EOBT \$	Rev EOBT	Bay ≎	TOBT	ADC \$	TSAT ≎		
AIC094	VOMM	12:45	12:45		V18R	12:35	P732	13:18		
SEJ415	VOBL	12:35	12:35		A5	12:25	P711	13:12		
JAI252	VCBI	12:35	12:35		V8L	12:25	P885	13:11		
AIC658	VIDP	12:30	12:30		V31R	12:20	P710	13:09		
JAI311	VIDP	12:30	12:30		V21R	12:20	P709	13:08		
JAI572	OKBK	12:25	12:25		V13	12:15	P904	13:02		
IG0243	VAAH	12:25	12:25		88	12:15	P708	13:00		
JAI461	VOMM	12:20	12:20		V20R	12:10	P706	12:55		



Efforts for "PERFECT FLIGHT"

from vision to reality