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civil air navigation services organisation

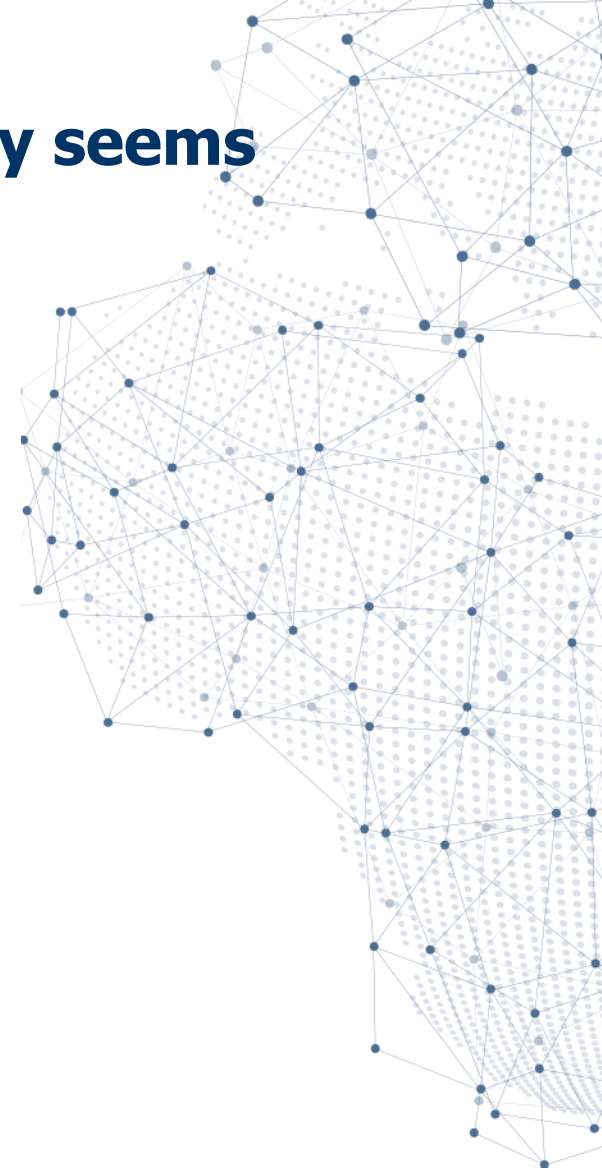
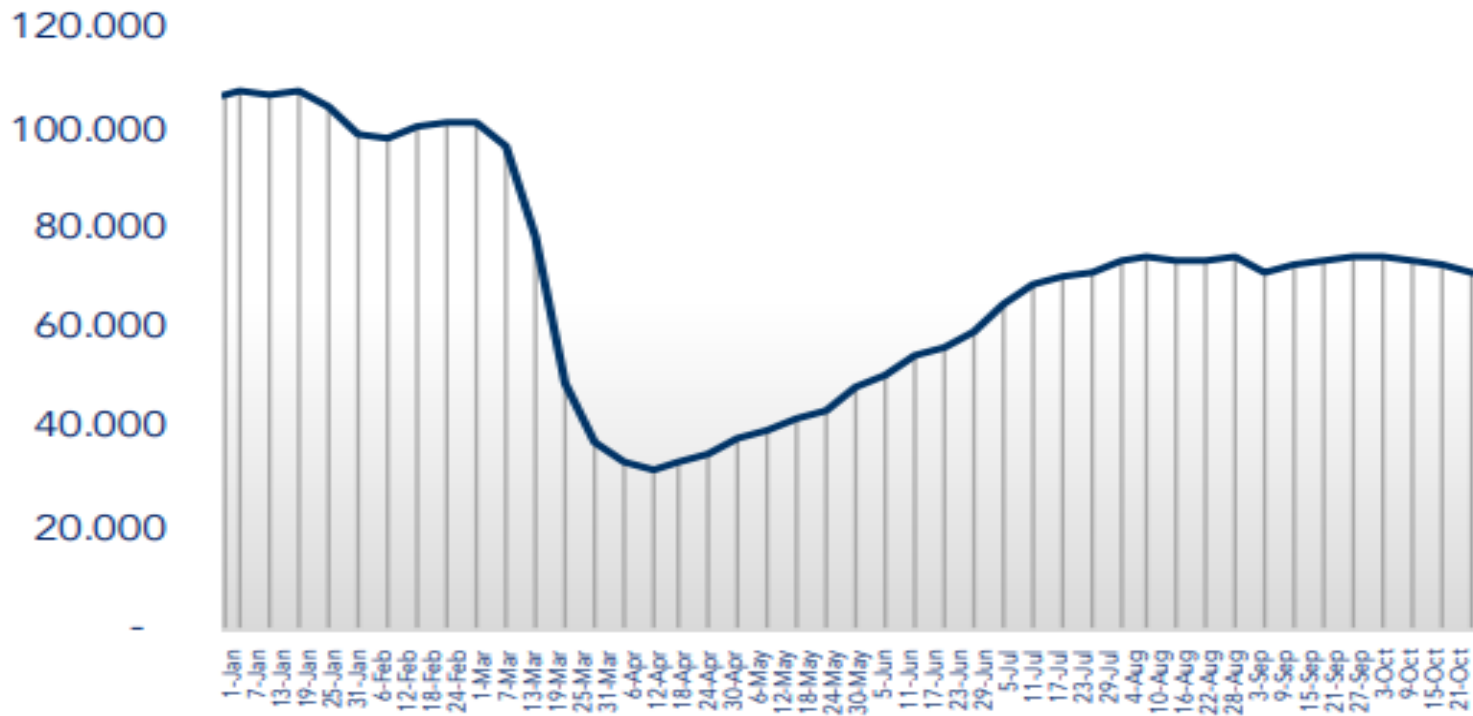
ANS PLANNING AND PROVISION – A NEW NORMAL?

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CANSO Asia Pacific Director

CNS SG/24 30Nov-4 Dec 2020

A precipitous fall followed by some recovery but recovery seems to have stalled.....

Average global flights



Looking Ahead

- Much uncertainty remains – when and how fast
- Air Traffic operational complexities will vary greatly depending on how long the downturn lasts and how fast traffic resumption occurs
- Shape and pace of recovery may be different in different regions and in different parts of a region



National Air Navigation Plans

- The Aviation System Block Upgrades in the ICAO GANP and Regional Plans remain relevant in a post-pandemic world as they are the building blocks necessary for the safety, efficiency and sustainability of flights.
- But priorities of ANSPs have been impacted by the crisis.
- How much of the previous focus on building capacity has now shifted to recovery, and business continuity management? And does the depressed traffic warrant a rethink of the implementation timelines?

An opportunity to improve service provision

- The down-turn is a pause in our overall growth. It is important that we look at how best to use that pause to better harmonise our efforts and ensure that benefits are optimised across the region.
- With reduced traffic levels, there are opportunities to review current airspace restrictions and to look for ways to improve service provision and to minimise operational delays and inefficient routings.
- As we look to the future our eye should be on those measures that enhance the resilience and sustainability of ATM operations.



Optimising ATM operations during COVID-19

Joint CANSO/IATA Letter for CANSO Asia Pacific Members in April calling for the flexible air traffic management during the crisis.

“Not only will the relaxation of these constraints during this period of very low international air traffic allow for flight efficiencies, but it could also act as a stimulus for growth once traffic levels start to recover.”

CANSO OSC Chair



14 April 2020

Attention: Joint CANSO/IATA Letter for CANSO Asia Pacific Members

Flexible air traffic management during the COVID-19 crisis.

With the downturn in air traffic due to the COVID-19 crisis, some air navigation service providers (ANSP) have been introducing more streamlined and flexible air traffic management procedures. We thank them for their effort in facilitating flight paths that deliver environmental and economic benefits through the reduction of fuel burn, emissions, noise and fuel costs during this period.

Aligned with a recent CANSO, IATA, and EUROCONTROL [Initiative](#) in Europe, we take this opportunity to reinforce the need for similar efforts in the Asia Pacific region.

Please find below suggested actions for air traffic controllers (ATCO) and pilots for consideration by ANSPs and airlines to be applied according to their specific circumstances. The principles should ideally apply throughout the period of COVID-19 induced low traffic levels and be subject to regular review as operations recover to normal.




Proposed ATCO / ANSP Actions

- Review external and internal Letters of Agreement (LoA) restrictions or sector handover procedures / altitude restrictions to see if a temporary relaxation of conditions is possible, especially when initial descent clearances are issued for arrivals to airports in neighbouring area control centres (ACCs), ensuring collaboration between centres / sectors
- Review arrival/departure restrictions and eliminate those that are not necessary in current conditions, including a review of military areas that are not in use
- Provide continuous descent operations (CCO) / continuous climb operations (CDO) conditions for each departure / arrival - not waiting for pilot request
- Provide more direct routings and if possible, information on expected tactical interventions or shortcuts in the descent phase delivered prior to top of descent (ToD) e.g. "no vertical constraints expected..." or "speed control expected..."
- Where available, closed standard arrival routes (STAR) should be used




Survey results of ANSPs' priorities



'NEW NORMAL': WHAT ABOUT THE NEW POSSIBLE?

An industry-wide survey of the aviation sector
framing our July 2020 Webinar series
organised with the support of CANSO, ACI, ICAO and IATA

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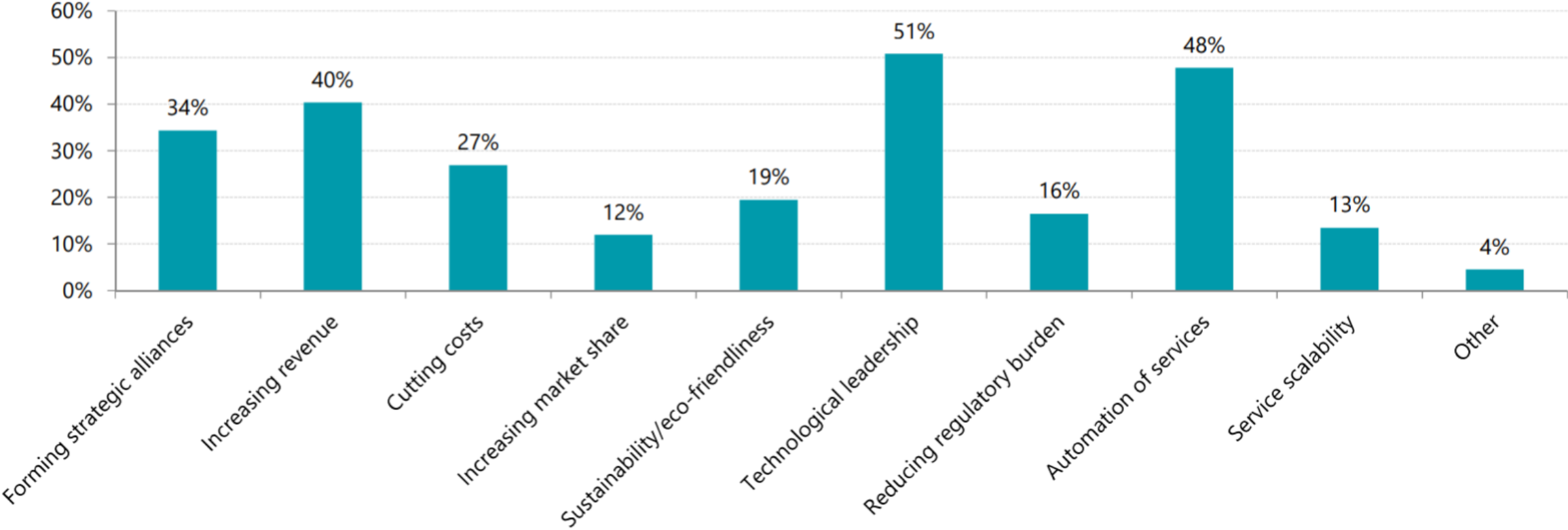
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Strategic Priorities of ANSPs – before Covid-19



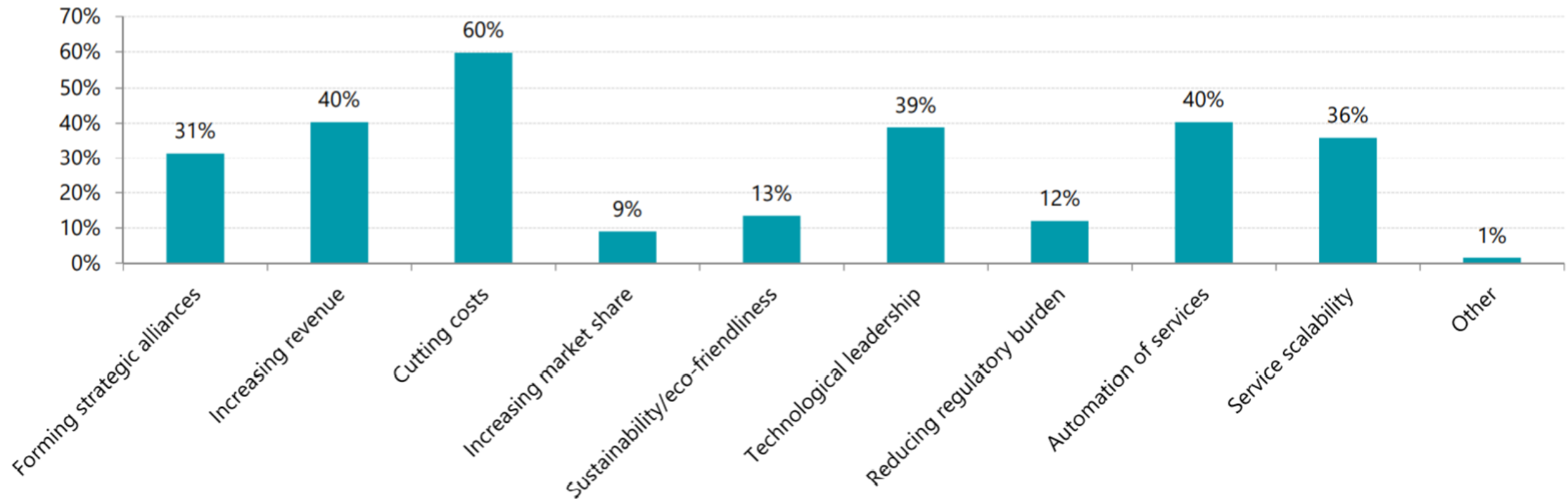
Other than safety, what were your company's highest strategic priorities before the pandemic? (ANSPs)



Strategic Priorities of ANSPs – post Covid-19



Other than safety, what are your company's highest strategic priorities likely to be after the pandemic? (ANSPs)



Most implemented measure to save cost - project postponement or cancellation

Cancellation of some ongoing projects or purchases

Adaptation of staffing schedules/rotations

Govt funded job retention scheme

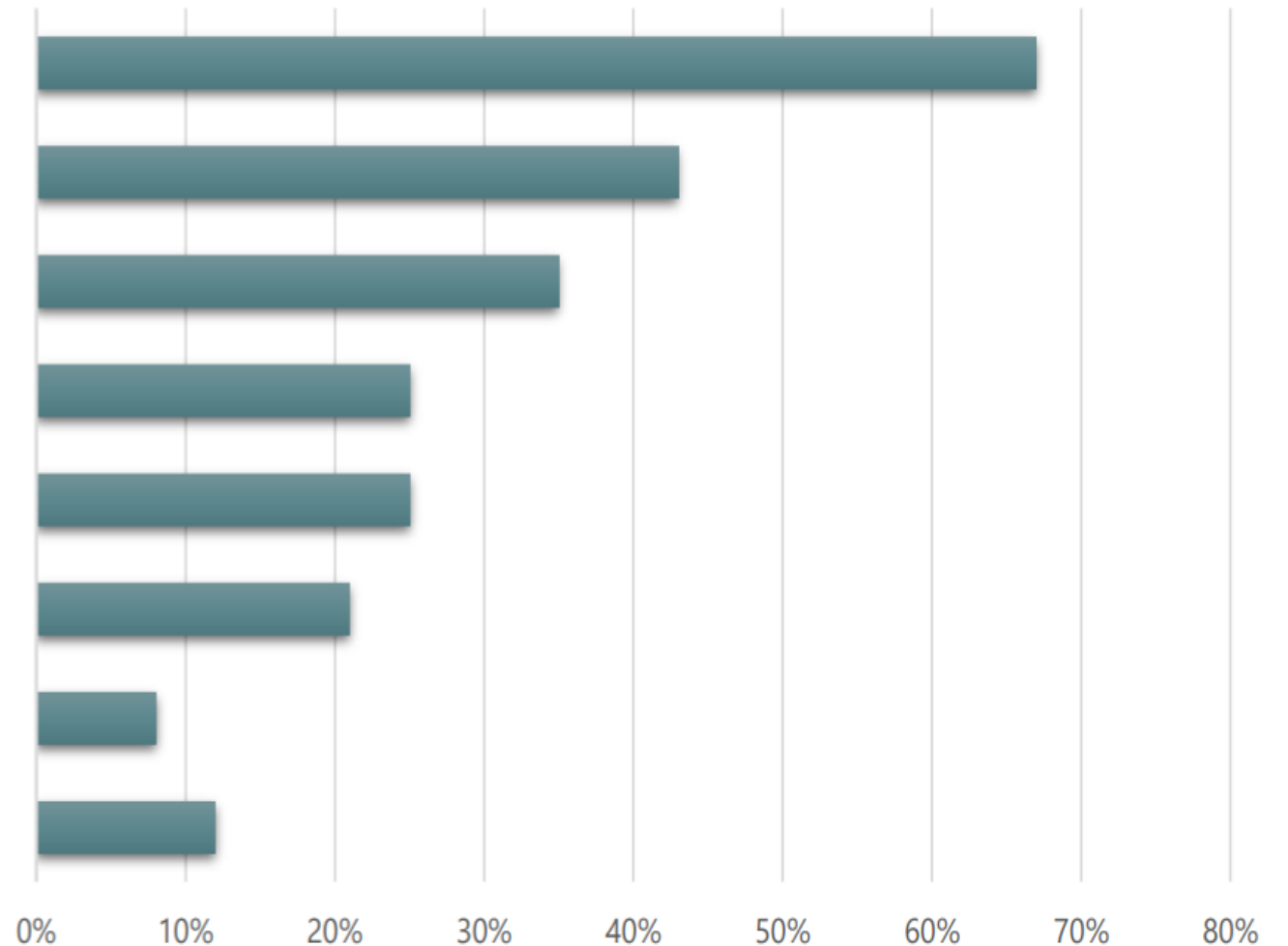
Reduced service

Salary cuts

Job cuts

Unpaid leave

Other



Re-prioritising capital investments

- ANSP priorities are likely to shift to those technologies that offer lower costs and enhanced resilience and scalability. More cloud based, space based technologies, data sharing, regional/sub-regional service provision etc?
- As airlines retire off their older aircraft during the downturn ANSPs will likely to be dealing with more modern and better equipped fleet than before.
- This is an opportunity for ANSPs to advance projects such as PBN and ADS-B which require typically relatively lower capital. Such investments will enable a more modernised airspace while potentially reducing ATM costs through the rationalization of nav aids and radars.



Opportunities for partnerships and collaboration

- New operating models are needed, facilitating greater collaboration with external partners to share risks, and more use of digitalisation and automation for improved efficiency, flexibility, scalability and resilience.
- From regional partnerships on upper airspace to new joint ventures and technological innovations, partnerships will be essential from both a financial point of view, sharing risk and in terms of moving faster.
- An ATM system designed around operational needs rather than tied to specific geographical locations or national borders, and one that can innovate while still providing safe services.



Keeping an eye on the Future

- While Covid-19 has brought respite to the airport and airspace capacity crunch in APAC, it has drastically reduced ANSP revenues.
- Cost-cutting is now the top priority of many ANSPs and this will significantly impact their investment plans. However, in this crisis there are opportunities for ANSPs to “build back better”.
- ANSPs have to keep an eye on the future. In re-prioritising capital investments and undertaking resource planning we should be conscious of the long lead time for technology implementation as well as the recruitment and training of staff.



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