



ICAO BANGKOK

UNITING AVIATION

ATM Economic Actions - COVID 19: Drivers

Len Wicks

*Regional Officer, Air Traffic Management/Search and Rescue,
International Civil Aviation Organization (ICAO)*

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Background

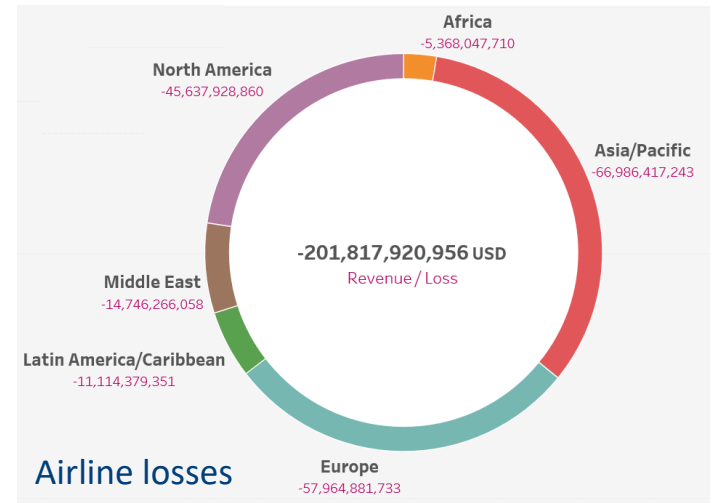
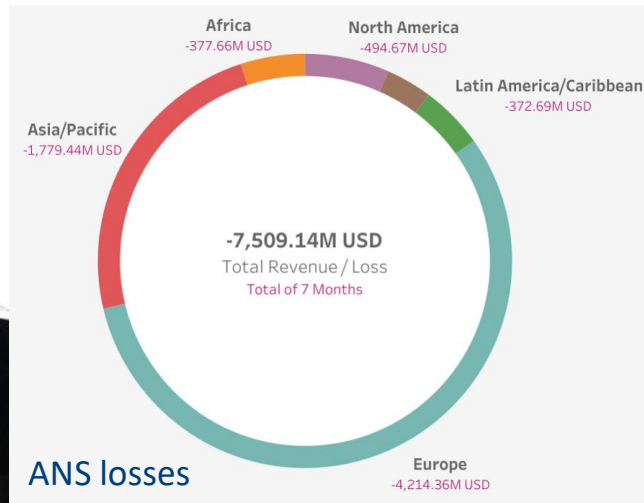
The extent of air navigation charges losses by FIR for 2020 (January – July) compared to 2019 have been staggering.





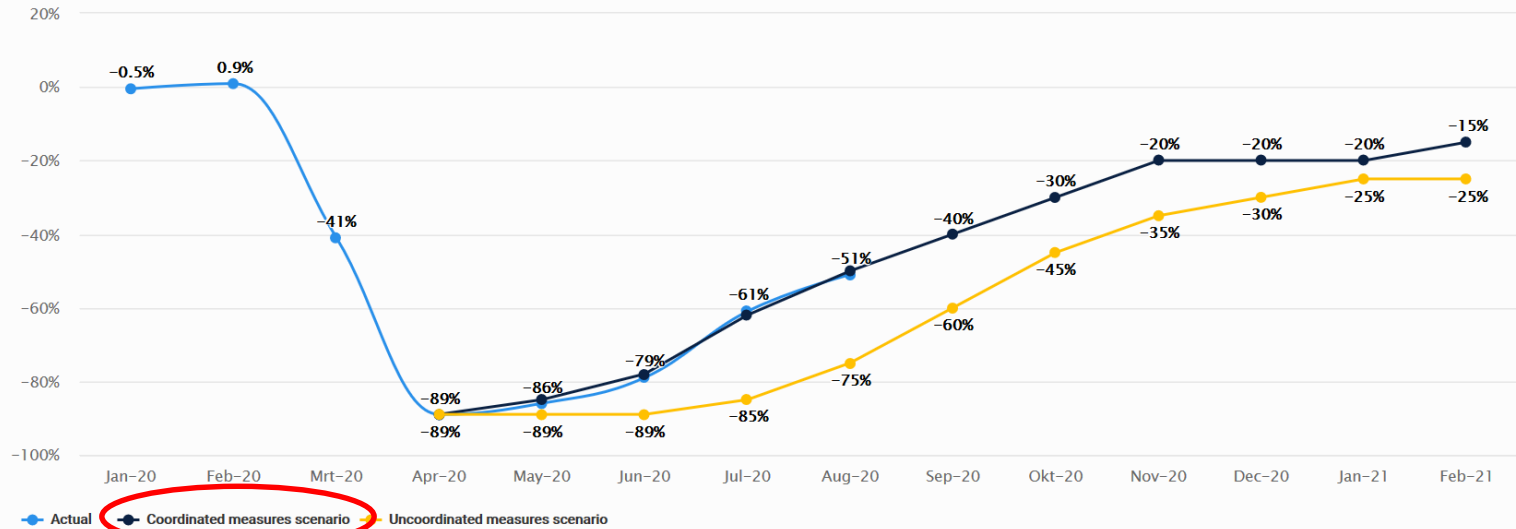
Background

However, if ANS losses have been high at USD 7.5 billion, then this is only 1/27th or 3.7% of airline losses (APAC the most).



Background

EUROCONTROL Draft Traffic Scenarios - 24 April 2020 (base year 2019)

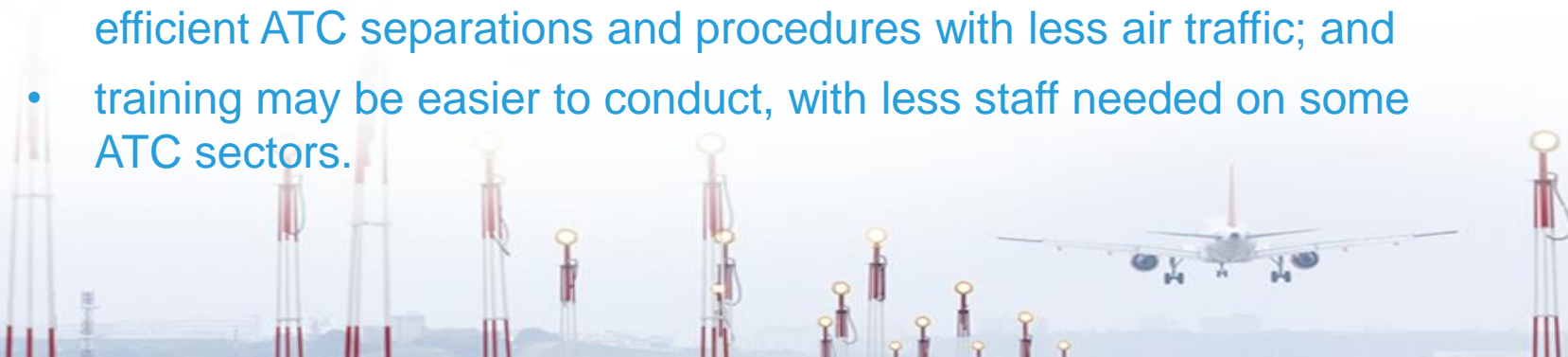




ICAO's View

The Regional Office had encouraged Air Navigation Service Providers (ANSPs) to consider taking actions that support the recovery of the air transport system, noting that:

- if COVID-affected systems allow, it's an ideal time to test more efficient ATC separations and procedures with less air traffic; and
- training may be easier to conduct, with less staff needed on some ATC sectors.

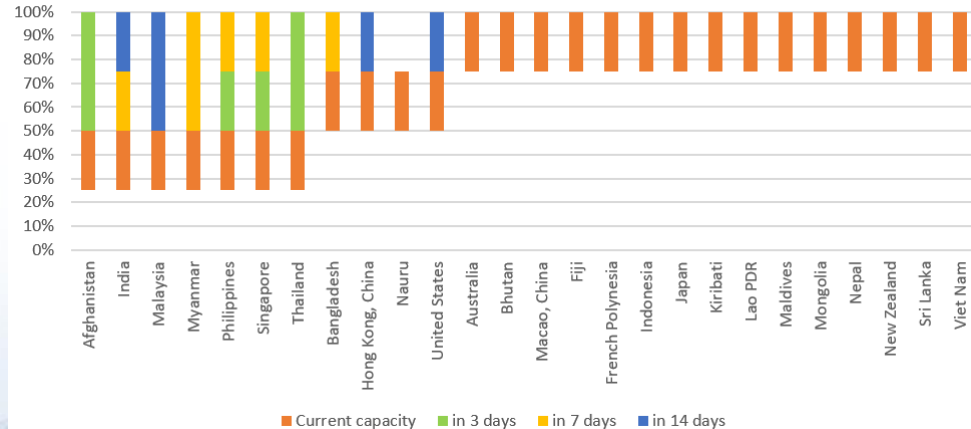


ICAO's View

ICAO had also discussed the need to be prepared in terms of capacity to support a recovery, either by 'travel bubble' city pairs or a more broad improvement.

(July 2020 data)

Time to reach an ATC capacity equivalent to that of December 2019





ICAO's View

The ICAO Regional Office had noted the positive efforts of some APAC ANSPs:

- the Airports Authority of India has removed the Indian Ocean Flight Level Allocation System restrictions to allow optimal cruising levels;
- on 01 May 2020 the Indian government announced that airspace should be used with close civil-military co-operation to save airline costs; and
- effective 30 July 2020, the Indian Airspace Management Centre is operational, with 20+ FUA Conditional Routes made available daily.



ICAO's View

The ICAO Regional Office had noted the positive efforts of some APAC ANSPs:

- AirNav Indonesia has trialled User Preferred Routes (UPRs) to provide more efficient flight paths.

Note: IATA has provided assistance to Indonesia to develop its NANP, and is happy to assist other States if requested (contact moorej@iata.org).



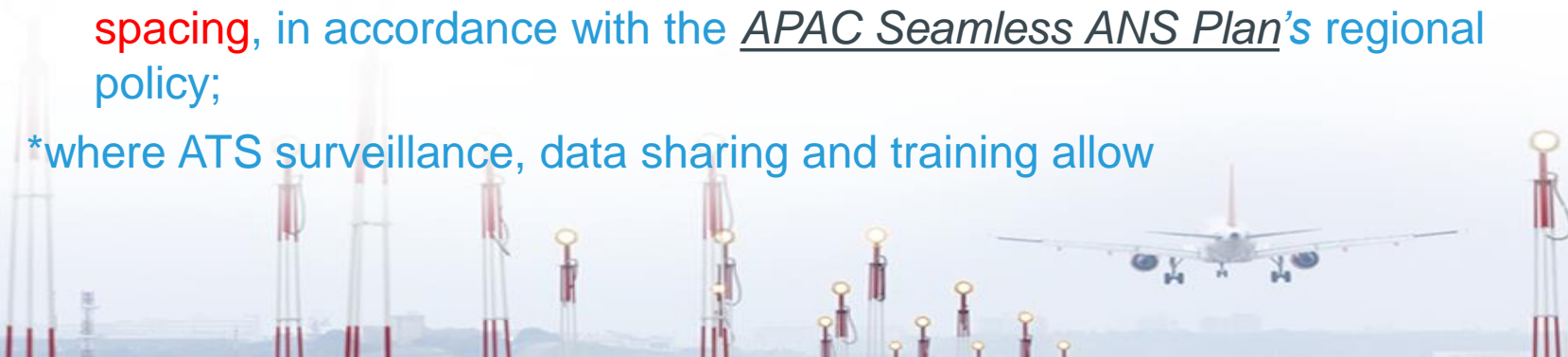


ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable:

1. introduction of 5/10NM* to 20/30NM minimum **Transfer of Control spacing**, in accordance with the APAC Seamless ANS Plan's regional policy;

*where ATS surveillance, data sharing and training allow

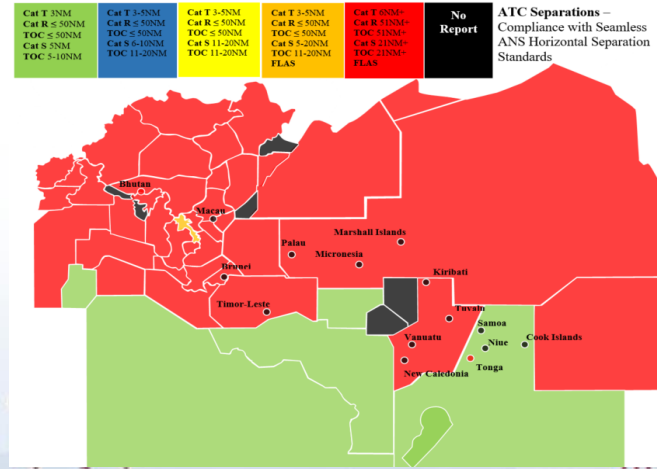


ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable:

2. declaration of the **minimum surveillance standard** matching the ICAO Doc. 4444 – *PANS ATM* standards:

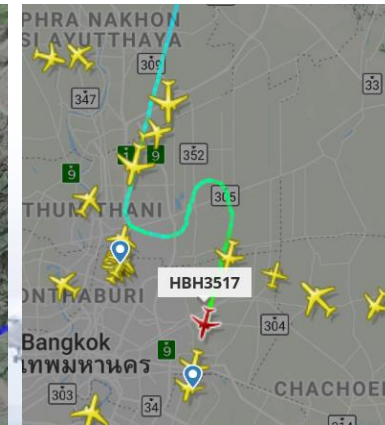
- ✓ 3NM within terminal airspace;
- ✓ 5NM enroute.



ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable:

3. enabling **efficient terminal flight paths** with arrival manager, Air Traffic Flow Management (ATFM), etc., not the use of holding or the use of 'trombone' delaying procedures!;





ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable:

4. ...**civil/military cooperation** has never been more important!
(with the need for the more efficient ATS routes and flight paths, understanding that defending the national interest and its economy is consistent with supporting civil aviation in this manner);





ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable and where appropriate:

5. operationalisation* of relevant technologies such as Space-based ADS-B (SB ADS-B), SATCOM, satellite VHF, electronic flight progress strips (min. 5 messages) and AIDC (minimum 5 messages) ;

- Advanced Boundary Information (ABI);
- Coordinate Estimate (EST);
- Acceptance (ACP);
- TOC; and
- Assumption of Control (AOC).

***This means an operational benefit to users!**



ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable:

6. where possible, **delay or cancellation of Capital Expenditure (CAPEX) and equipage mandates** to match the changed economic and operational environment (this is a fundamental NANP process);

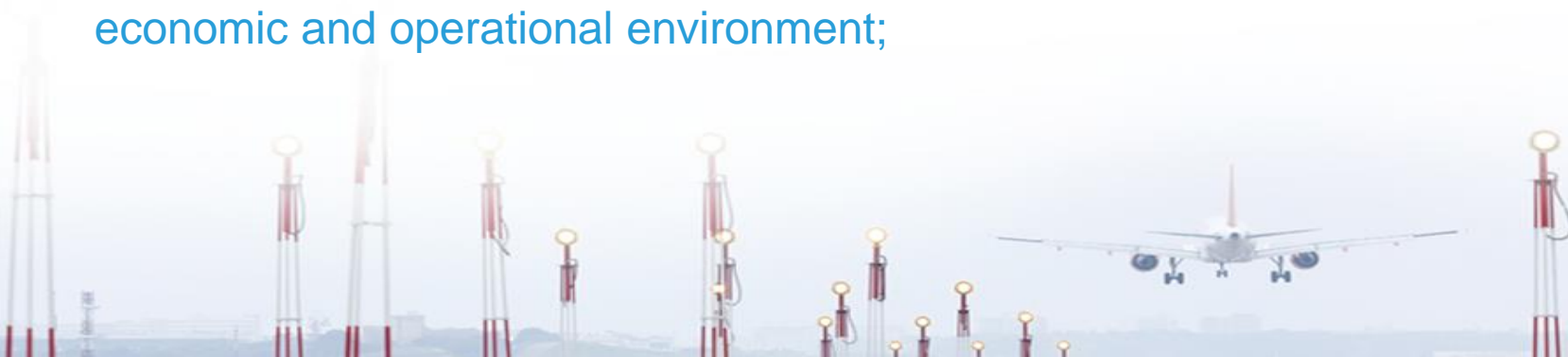




ICAO's View

However, in general, the Regional Office hadn't noted many ANSPs taking action in accordance with CART Rec. 11, which could include, where capable:

7. where possible, **lowering ANS charges** to match the changed economic and operational environment;





Conclusions

The losses made by airlines during 2020 have been staggering, and so the aviation industry faces a major threat to its future, requiring:

1. governments to provide extraordinary funding and other economic support measures to ensure the aviation system's economic viability;
2. for their part, ANSPs to consider whatever economic means possible to support viable airlines (...in order words, be innovative).





Conclusions

Most ANSPs have been experiencing some level of financial stress, so many will seek government financial support and policies to recover from the pandemic; but if the focus is entirely on the ANSP and not the air transport operators, then the ANSP will fail anyway!





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THANK YOU