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SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)

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Agenda Item 3: Strengthening regulatory and institutional frameworks
3.2: Enhancing air connectivity through progressive economic and regulatory aviation frameworks for international air transport

MARKET ACCESS AND CONNECTIVITY IN KAZAKHSTAN: THE OPEN SKIES REGIME AND ESSENTIAL AIR SERVICES FOR REMOTE REGIONS

(Presented by Kazakhstan)

EXECUTIVE SUMMARY

Kazakhstan combines a progressive Open Skies regime, which has widened competition, foreign-carrier entry and route choice and extended international connectivity to some thirty countries, with a subsidy program for socially important routes that sustains air access to remote regions and supports tourism. This paper presents the two policies together as a national experience in balancing market liberalization with protected access, relevant to this agenda item and to the connectivity measure proposed by Kazakhstan under Agenda Item 1.2.

1. INTRODUCTION

1.1 This agenda item addresses progressive economic and regulatory frameworks that enhance air connectivity. Kazakhstan presents two complementary elements of its own framework: an Open Skies regime for international services and a program of essential air services for remote regions.

1.2 The two are presented together because, in Kazakhstan's experience, they answer one question from two sides: how a large, sparsely populated State connects both to the world and within its own territory.

2. DISCUSSION

2.1 Open Skies: Kazakhstan's Open Skies regime has widened competition, opened the market to foreign-carrier entry and increased route choice for passengers and shippers. International connectivity now spans some thirty countries. The regime reflects the direction set by the International Civil Aviation

Organization's (ICAOs) long-term vision for international air transport liberalization and has been introduced progressively, allowing the national industry and the authority to adapt.

2.2 Essential air services: Liberalization alone does not serve routes that cannot sustain commercial operation. Kazakhstan therefore operates a subsidy program for socially important routes that sustains scheduled air access to remote regions, supports tourism and maintains links that a purely commercial network would not provide. The program is targeted, transparent and reviewed against the routes it supports.

2.3 The combination matters: Open Skies brings capacity, competition and international reach to the hubs; essential air services carry that reach into the regions. Neither policy alone would produce the connectivity that the two produce together, and the benefit of the combination is not captured by volume-based traffic measures, which is why Kazakhstan has proposed a global connectivity index under Agenda Item 1.2.

2.4 The experience also indicates that the two policies are compatible: a liberal international regime has not undermined the case for targeted domestic support, and targeted support has not been used to shelter the market from competition.

3. CONCLUSION

3.1 Kazakhstan's experience shows that progressive market liberalization and targeted support for essential air services can be operated together as a single connectivity policy.

3.2 Kazakhstan offers this experience to States facing similar geography and invites exchange on the design of essential air service programs and on measuring the connectivity they deliver.

3.3 The Conference is invited to note the information contained in this paper.

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