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SHAPING OUR FUTURE SKIES

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ICAO NAM/CAR/SAM Workshop on Airport and Air Navigation Services User Charges

Funding Future Skies: Charges as Strategic Enablers

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A Paradigm Shift: Charges must be discussed as part of the future aviation system — not as a stand-alone billing issue

If aviation is to grow safely, ATM and airspace must be treated as strategic infrastructure.

Safe capacity

Resilience

Sustainability

Charges create the economic conditions for all three when they are transparent, cost-related and linked to long-term investment needs.

The pressure equation is changing

Growth is now occurring together with more complex operations, digital systems and sustainability expectations.

Traffic growth → **New entrants** → **Digitalization + AI** → **Resilience + cyber** → **Sustainability pressure**

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The system requirement

Create safe capacity — at scale

This requires operational modernization and economic frameworks that move in the same direction.

ATM and airspace are strategic infrastructure

They are foundational enablers of national connectivity, competitiveness and environmental performance.

Connectivity

Safety

ATM

Capacity

Environmental performance

The policy implication: airspace modernization belongs in national infrastructure, implementation and financing plans.

Future skies will not be a single-user environment

Airspace policy and charging frameworks must anticipate more integrated and diverse operations.

Space launch / re-entry coordination	Dynamic integration with civil traffic
UAS and advanced air mobility	Dense, digital and data-reliant operations
Supersonic / high-altitude operations	Crossing and operating above conventional flows
Commercial aviation	Mainstream controlled airspace

One integrated airspace

- ✓ More actors and more operational profiles
- ✓ Greater dependence on data, automation and interoperability
- ✓ Higher need for cross-border and cross-sector coordination
- ✓ Charging frameworks that support integration, not fragmentation

Modernization is no longer optional

Digitalization, automation, CNS resilience, cyber-resilience and airspace redesign are prerequisites for future operations.

Digitalization

Automation + AI

CNS resilience

Safe capacity

Cyber resilience

Airspace redesign

Data interoperability

The charging debate must be linked to the investment plan that funds these capabilities.

The financing challenge must be part of the policy discussion

Many States need longer-term, more predictable ways to fund ATM modernization.

A short-term tariff conversation

“What is the charge this year?” →

A strategic infrastructure conversation

“What safe capacity must the system deliver — and how will we finance it?”

Charges

Investment plan

Finance ministry

National strategy

Charging frameworks must remain credible

The ICAO principles are not obstacles to investment; they are what make investment acceptable to users.

Cost-relatedness	Charges linked to the cost of providing ANS and enabling investment
Transparency	Clear methodology, cost basis, unit rates and timing of changes
Non-discrimination	Uniform application unless objectively linked to service level
Consultation	Regular exchange on costs, service levels and investment priorities

For future skies, consultation must move from “rate notification” to “shared investment planning.”

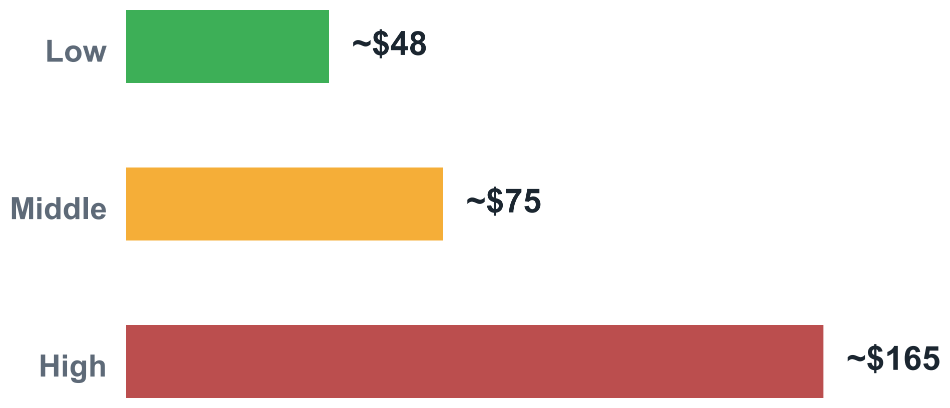
What a benchmark should tell us

The benchmark is not the central message — it is a diagnostic that shows why dialogue matters.

Observed regional landscape

- ✓ Different methodologies: distance-only, fixed fee, weight-distance and brackets
- ✓ Different sensitivity to aircraft type, distance and route profile
- ✓ Significant cost variation for comparable operations
- ✓ Potential trade-off between simplicity, precision and cost-relatedness

Regional variation — illustrative diagnostic



Lesson: use benchmarking to improve transparency and alignment — not to trigger a price "witch hunt".

Industry must work together — by design

No single stakeholder can solve capacity, modernization and integration alone.

States / regulators
Policy, oversight and national plans

Finance ministries
Long-term infrastructure financing

Airspace Users
Demand, route impacts, performance needs

Shared objective: future-ready airspace

ANSPs
Service needs, safety case, delivery roadmap

Airports
Capacity interface and operational coordination

ICAO / regional bodies
Common principles and cooperation

CANSO proposals for NAM/CAR/SAM cooperation

A practical agenda to connect charging frameworks to future airspace needs.

1. **Recognize ATM and airspace as national infrastructure in strategic and implementation plans**
2. Build multi-year consultation around investment, service levels and performance outcomes
3. Use benchmarking as a transparent diagnostic for cost allocation, methodology and competitiveness
4. Explore financing tools: blended finance, de-risking, public investment and regional cooperation
5. Plan now for new entrants, digitalization, AI, cyber-resilience and cross-border interoperability

The target is not higher charges by default — it is better-aligned charges that enable safe growth and modernization.

A common agenda for future skies

Grow safely. Modernize deliberately. Finance strategically.
Consult transparently.

Safe capacity

Integrated airspace

Future entrants

Digital + AI readiness

National infrastructure plans

THANK YOU

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