

Civil Air Navigation Services Organisation



# ANSP Models

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## Introducing CANSO

- Civil Air Navigation Services Organisation
- Represents 'Corporatised' ANS providers
- Founded 1998, based in Geneva
- Worldwide 25 Full & 29 Associate Members
- Promote safe, efficient, cost effective ANS

## Introducing CANSO

- Members control 56% of world's airspace
- Members control 82% of world's air traffic
- Members handled 43 Million flights in 2001

# CANSO Members

**Aerothai – Thailand**  
**AENA – Spain**  
**ANS Czech Republic**  
**ATNS South Africa**  
**Airservices Australia**  
**Airways Corp. New Zealand**  
**Austro Control**  
**Belgocontrol**  
**CAA Uganda**  
**DFS - Germany**  
**ENAV - Italy**  
**Estonian ANS**  
**Irish Aviation Authority**  
**Kazaeronavigatsia**  
**LGS – Latvia**  
**LPS – Slovakia**  
**LVNL – the Netherlands**  
**MoldATSA Moldova**  
**NATS UK**

**NAV Canada**  
**NAV Portugal**  
**Naviair Denmark**  
**Oro Navigacija Lithuania**  
**Roberts FIR**  
**skyguide**  
**ROMATSA Romania**  
**UkSATSE Ukraine**

**AEA Technologies**  
**Airbus**  
**Air Canada**  
**ARINC**  
**Boeing ATM**  
**British Airways**  
**CAA Slovenia**  
**Comsoft**  
**Concordia University**  
**FAA**  
**Frequentis**  
**HungaroControl**  
**Indra Sistemas**  
**Innovative Solutions**  
**Integra**  
**Lockheed Martin ATM**  
**LFV Sweden**  
**MITRE**  
**NATAM Norway**  
**Orthogon**  
**PriceWaterhouseCoopers**

**Raytheon**  
**SCTA France**  
**SITA**  
**Thales ATM**  
**Unisys R2A Transport Management Consultants**

## ATM issues today

**When the air transport industry is fine:**

**– Nav Charges go DOWN**

**When the air transport industry is sick:**

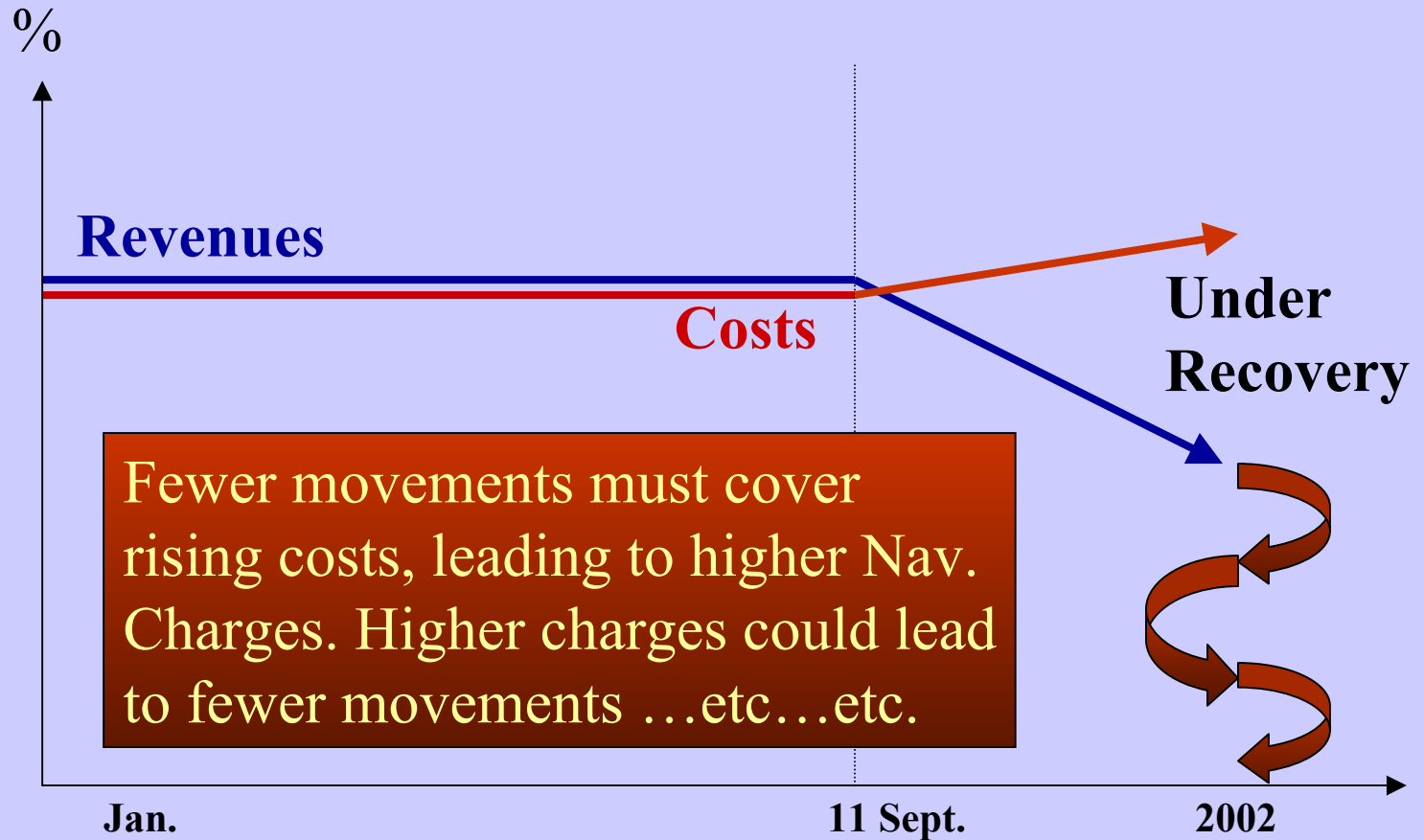
**– Nav Charges go UP**

## ANSP Finance in Recent Years

High growth rates resulted in 'over-recovery' and significant paybacks. Since 2001 the reverse is true.



# Impact of Under Recovery in downturn



## Additional Lessons of 2001

- Fewer flights demand same number of ATCOs
- Smaller aircraft, same workload, lower revenue
- ANSPs forced to service insolvent customers
- Airline bankruptcies, paid by remaining carriers

## Problem = ANS Financial Framework

- Financial framework predates service separation
- ANSPs lack standard financial & business tools
- In-complete separation of Provision & Regulation
- Regulatory charge elements still in ANSP budget
- Limited control over Regulatory costs

## Each ANSP is Unique

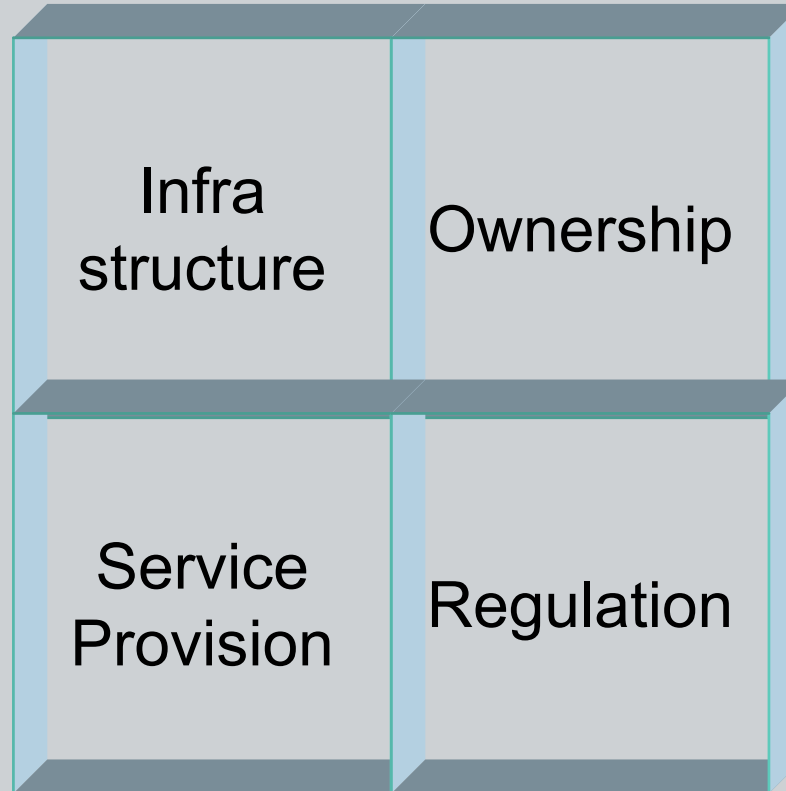
- Many different ANSP economic models
- Range from 'Privatised' - 'Corporatised' – 'State'
- Ranging from 'For-Profit' to 'Non-Profit'
- Small & Large ANSPs; Oceanic or High density

# Different ANSP Models

Privatised For Profit	Privatised Non-profit	Corporat. For Profit	Corporat. Non-Profit	Other
NATS	Nav Canada	Airways NZ Airservices Australia	Continental Europe	SCTA France FAA

# A N S Structure

**Outsourcing  
Suppliers  
Partnership**

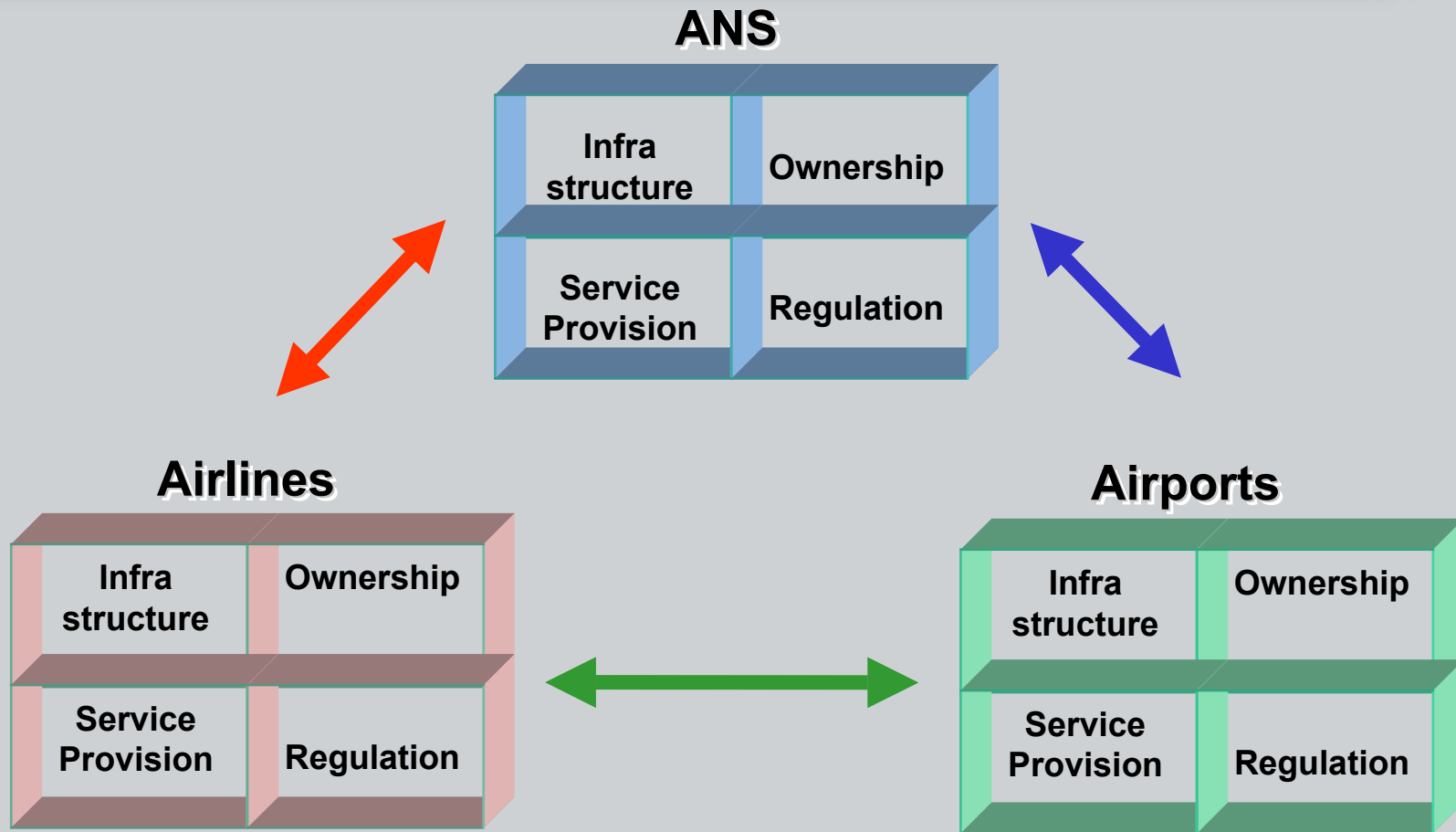


**States  
Customers  
Third parties**

**Monopoly  
Licensing  
Designation**

**Safety  
Quality  
Economic**

# Air Transport



# Airline segmentation & services

Alliance  
Network  
Carriers

**STAR**  
**One-World**  
**SkyTeam**

National  
Carriers

**Saudia**  
**Gulf Air**  
**Air India**

Regional  
Airlines

**Comair**  
**JAS**  
**Braathens**

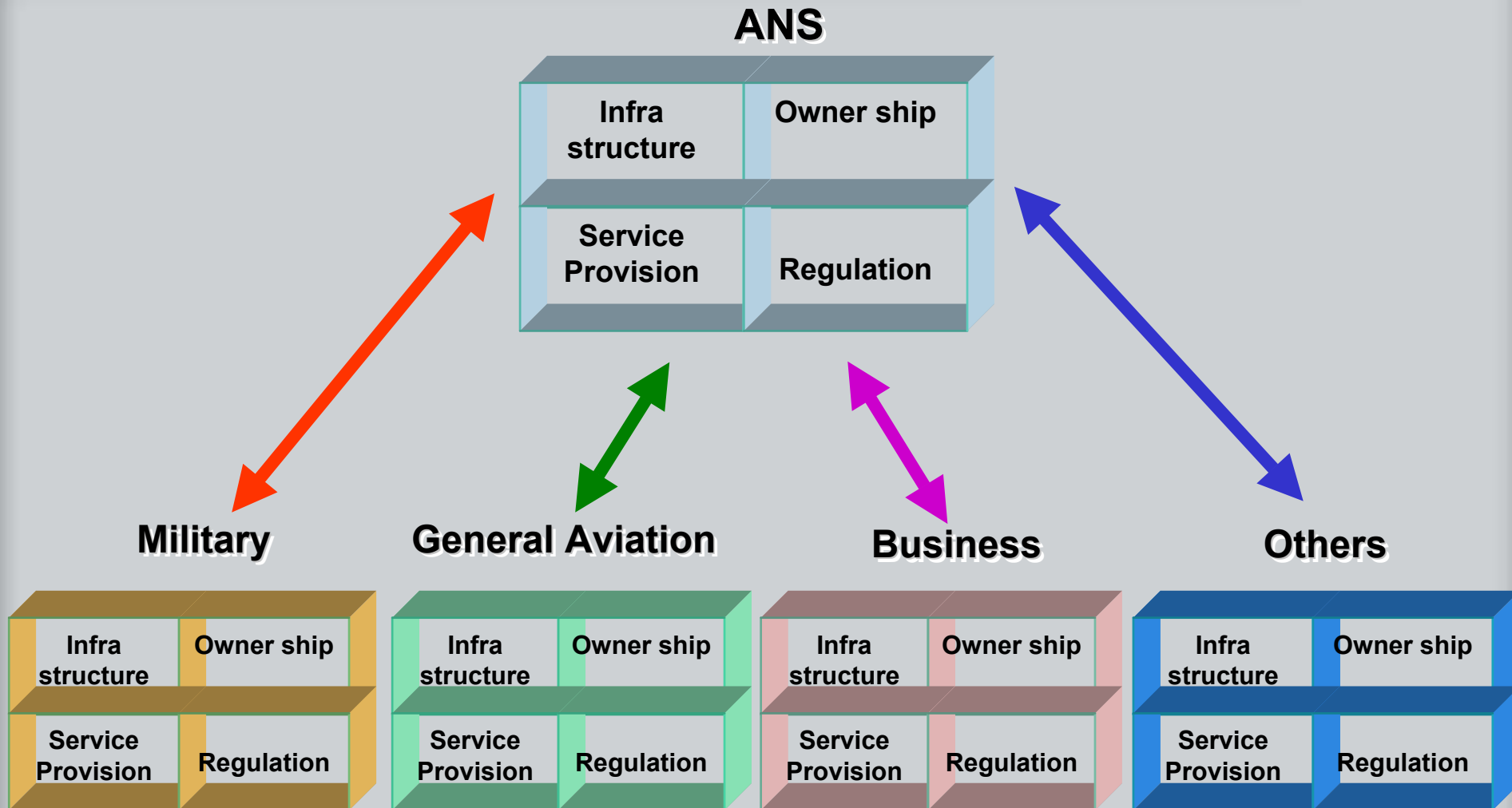
Low Cost  
Airlines

**Southwest**  
**Ryanair**  
**easyJet**

Charter  
Carriers

**Brittania**  
**Martinair**  
**Atlas**

# Segmentation ANS Customers



## ATM issues today

- Recognise ATM deficiencies, develop solutions
- Establish open relationship with all players
- Support joint approach on system deficiencies
- Next steps require full 'Stakeholder' support

## Our Message to the Audience

- Recognise current ATM system has flaws
- Cost recovery designed for growth, not a downturn
- ATM a patchwork of many national approaches
- The future requires more 'global' approach

## Our Message to the Audience

- Corporatisation introduced ANSP independence
- But not **full** financial independence
- Full separation of State & ANSP budgets
- Greater transparency of all individual charges
- Like every other industry, ANSPs require proper financial instruments & incentives

# Conclusions

- **ATM industry changing**
- **National -> Global**
- **Overcome differences**
- **Invest today in tomorrow's solutions**



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[www.canso.org](http://www.canso.org)

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