



Agenda Item 4A: Initiatives for the development and sustainability of air transport in the Region

CHILE'S EXPERIENCE IN THE DRAFTING AND IMPLEMENTATION OF THE CIVIL AVIATION MASTER PLAN

(Presented by Chile)

SUMMARY	
This working paper describes the process followed by Chile for the definition of its civil aviation master plan, outlining the methodology applied and the coordination among the various actors involved, an experience from which it is possible to draw lessons and challenges that constitute opportunities for future improvement.	
Reference:	
<ul style="list-style-type: none">• Declaration to Promote Connectivity by Developing and Sustaining Air Transport in the Pan American Region - Vision 2020-2035	
ICAO strategic objectives:	<i>This paper applies to all ICAO strategic objectives</i>

1. Background

1.1 The decision to develop a strategic plan for air transport in Chile was taken at the 1,901st session of the Council of the Civil Aviation Board (JAC), held on 10 September 2019. The JAC is chaired by the Minister of Transport and Telecommunications and is also composed by the Director General of Civil Aviation, the Undersecretary of International Economic Relations, the Undersecretary of Social Development, the Director of Airports of the Ministry of Public Works, and two representatives appointed by the President of the Republic. This body is responsible for high-level management of civil aviation in Chile through the coordination of public policies that have an impact on the development of this activity.

1.2 The aforementioned decision originated from the recognition and verification that, despite the existence and implementation of various sectoral plans related to specific aspects of civil aviation, the country lacked a cross-cutting plan that would organically and consistently articulate the different initiatives and projections developed by the competent authorities. Likewise, the proposal promoted by the International Civil Aviation Organization (ICAO) to position aviation at the highest level of government decision-making and incorporate it into national development plans was taken into account, bearing in mind that air transport is a driving force for the economy and progress within a society.

1.3 The ultimate objective of having such a plan is to ensure the sustained growth of civil aviation in the country and, as far as possible, to insert it into regional planning, with emphasis on four fundamental axes: 1) air connectivity, 2) safety, 3) institution building, and 4) environmental protection.

2. **Drafting of the plan**

2.1 Once the decision was made by the national authorities responsible for civil aviation, it was agreed to engage a private consultancy with experience in the field to draw up the strategic air transport plan, in order to have the vision and input of an independent and impartial body with complete freedom of analysis and opinion.

2.2 As a theoretical framework for the development of the plan, multiple sources of information generated by various specialised organisations were considered, such as manuals and documents approved by ICAO in relation to airport management, environmental protection, passenger and cargo demand projections, runway design and infrastructure planning. Also, manuals prepared by Airports Council International (ACI) on quality of service at airports; World Bank documents; International Air Transport Association (IATA) publications; demand projections estimated by aircraft manufacturers; strategic plans of other countries; World Travel and Tourism Council (WTTC), World Economic Forum (WEF) documents, and academic publications, among other sources.

2.3 Furthermore, the development of the study was aligned with other similar master plans and initiatives already existing in Chile, such as the urban regulatory plans of the localities in which Chile's main airports and aerodromes are located; the Logistics Master Plan for cargo services; the National Tourism Strategy; the Infrastructure Development Plan, and other long-term plans that are directly or indirectly related to the airline industry and other means of transport.

2.4 A particularly important element among the inputs considered in this planning was the participation of the main air transport stakeholders in Chile, such as airlines, public sector authorities, airport concession holders, ground handling companies, industry associations, etc., all of whom had the opportunity to express their opinions and comments, their medium- and long-term plans, their expectations and needs, and their vision of air transport in Chile through the interview methodology applied by the consultant.

2.5 Ultimately, the work focused on the long-term planning of the aviation sector, especially considering its modernisation needs and challenges, and proposing measures and goals to further its development. All this within the context of the relationship between air transport and other economic activities, and within the framework of the national policies applicable to them.

3. **Objectives of the plan**

3.1 Some general objectives of the study were: 1) to identify the strategies or issues required to promote economic, social and environmental sustainability and growth of the airline industry; 2) to identify gaps and anticipate changes that may occur in the future; and 3) to identify mechanisms or incentives to promote improvements in air transport.

3.2 The specific objectives set for the study were as follows: a) to develop estimates of passenger and cargo demand up to the year 2050, including different scenarios of recovery from the COVID-19 pandemic; b) to make a diagnosis of airport infrastructure in the primary network, corresponding to the 16 main aerodromes and airports in the country, considering runways, taxiways, aprons, terminal buildings and analysis of connectivity between cities and airports; c) to analyse the environmental impact of the air industry in terms of noise, pollutants, mitigation strategies and feasibility of the basket of measures suggested by ICAO; d) to set airport investment priorities; e) to assess the professional and technical staffing needs for the services associated with the activity; and f) to propose solutions to the various problems identified in air transport in Chile.

4. **Challenges and opportunities for improvement**

4.1 The drafting of a master plan for civil aviation represents a major effort for States and requires the highest relevance and coordinated work by the authorities involved, not only in its design, but also in the implementation of its conclusions. Thus, in the case of Chile, based on the study carried out, it was possible to confirm the following, among other results: the State plays a fundamental role in the implementation of the improvements and recommendations proposed in the analysis; it is essential to adapt the airport system to the development models of pioneer States; there is a range of interrelated aspects that need to be studied in depth to optimise the processes of the aeronautical system and promote its growth.

4.2 Likewise, the main findings were that: there is a lack of master plans for airport development; concession contracts are mainly oriented towards raising funds for the government; air cargo is usually a forgotten factor in airport bidding processes; in general, there is available runway capacity, but some terminal buildings are already beyond their designed capacity; there is little public transport to airports and a clear preference for private vehicles, among others.

4.3 This plan was developed as a tool to be used by public policy decision-makers and thus requires periodic updates to adapt to changes in what is essentially a dynamic environment. Therefore, a five-year review period was considered, in line with ICAO recommendations.

4.4 However, it is not only essential to update the plans periodically; it is also necessary to design a methodology and provide the authority with the respective capabilities to give continuity and permanence to the planning process itself, since strategic plans are not a static but a dynamic instrument, and, therefore, require constant feedback from the aeronautical ecosystem and other factors that bear an impact on it, for their better implementation and greater effectiveness.

5. **Suggested action**

5.1 The Meeting is invited to:

- a) take note of the experience reported in this working paper; and
- b) consider its contents in the discussion and exchange of views on this agenda item.