



Remarks of CANSO Director General, Jeff Poole, to the Global Ministerial Aviation Summit in Riyadh, Saudi Arabia, on Wednesday 31 August 2016

Ministers, your Excellencies, President of the ICAO Council, respected colleagues...

Good morning and thank you to the Kingdom of Saudi Arabia and to our good friends in GACA for organising this important event – and for the opportunity for me to speak to you on behalf of the air traffic management (ATM) industry.

CANSO – the Civil Air Navigation Services Organisation – is the global voice of air traffic management and our Members include air navigation service providers from the Middle East region.

In addition, we provide benchmarking, best practices and implementation support across the fields of safety, security, operations, policy and regulation.

This morning I will talk about the air traffic management challenges in the region and propose some solutions. Given the discussions earlier in this excellent Summit, it should be no surprise that these solutions will require your help and support, and for us all to work together.

The economic benefits of aviation in the region

With its strategic location between Europe and Asia the Middle East is one of the world's most important aviation hubs. Air transport supports 2.4 million jobs and the industry and made a \$157 billion contribution to GDP in the region – set to grow to \$489 billion by 2034. The past five years have seen record growth in air traffic across the region and is set to continue at a rate of six percent a year over the next two decades.

The challenges for air traffic management

This is all good news but what is less good news and of great concern to CANSO and airspace users is the state of the airspace in the region. The airspace is fragmented, creating safety, efficiency and capacity challenges for the region.

Around half the airspace in the Middle East is reserved for military use, leading to saturated and congested airspace for commercial use. The high number of handovers that take place between different authorities in different divisions of airspace leads to delays. The existence

of conflict zones further exacerbates the situation due to frequent closures of large areas of airspace, which in turn create congestion in the airspaces to which commercial flights are diverted. Furthermore, sanctions have also blocked a number of products and services in some countries, including vital aviation tools and equipment.

We can analyse the actual and potential impact of these barriers. Last year, one of CANSO's Members, NATS, commissioned Oxford Economics to publish a survey on air traffic management in the Middle East. The report calculated that the average flight in the region was delayed by 36 minutes and that 82 per cent of those delays were attributable to air traffic control capacity and staffing issues. By 2025, without further investment in air traffic control systems, a doubling of delay minutes to 59 minutes would cost the region \$16.3 billion.

Transforming ATM performance in the region

So what can we do about this? What is the solution? How do we transform ATM performance in the region?

Obviously, to handle aviation growth safely, efficiently and cost-effectively, the region needs the right ATM infrastructure. Countries in the region have invested massively in aircraft and airport infrastructure, but it is critical that the invisible part of the aviation value chain – air traffic management – is not forgotten.

In spite of numerous challenges that ANSPs in the region face in their daily operations, many countries have taken important steps to improve efficiency and capacity by designing and implementing changes to airspace, procedures and supporting technical infrastructure. What is more, a lot has been achieved in the past 10 years in communications navigation and surveillance, aeronautical information management and quality management systems

One important enabler for improving efficiency is airport collaborative decision making (A-CDM), which is why it is the number one priority in the aviation system block upgrades (ASBU) module in the ICAO Middle East (MID) air navigation strategy. Others are air traffic flow management (ATFM) and implementing performance-based navigation (PBN).

Partnership, coordination and cooperation

While these developments are to be welcomed, airspace needs to be coordinated and managed across the region as a whole and the industry must cooperate day by day on actual, measurable actions to transform airspace on a regional basis.

Over the past few days, many speakers have talked about the importance of working together with other organisations. We must therefore translate talk into actions and deliverables. We know that this is possible and we have heard in this Summit of some great examples of regional airspace management in COCESNA and ASCENA and, of course, in Europe.

CANSO is fully committed in the Middle East region to maintaining the current coordination and partnership with Arab Air Carriers Organization (AACO), Arab Civil Aviation Commission

(ACAC), ICAO, IATA and other organisations as this is the only way to achieve our joint objectives.

CANSO has consistently promoted joint ATM stakeholder initiatives in the region and fully supports the Middle East ATM Enhancement Programme (MAEP). MAEP was established to align activities and provide a vehicle for inter-regional cooperation and collaboration and it will prove invaluable in facilitating the development of interfaces with regions around the Middle East such as Africa and Mid Asia. We must also maintain and strengthen the dialogue between civil and military users through flexible use of airspace (FUA).

Ultimately, there is a real need for collaboration across national borders; first through dialogue between ANSPs and airlines at the national level to establish the priorities of airspace users; second through coordination of national development projects between States through the relevant regional/international organisations and associations (e.g. AACO, CANSO IATA, ICAO); and third through harmonising and synchronising the deployment and implementation of airspace technical requirements ensuring inter-operability across countries, improved safety and more effective operations.

Institutional Change

CANSO firmly believes that the same organisation having responsibility for both regulation and the provision of ATM services acts as a constraint. A clear regulatory framework and proper separation has very real potential to unlock value enabling ANSPs to concentrate on the delivery of efficient, cost-effective and customer-oriented air navigation services.

This can be done by making use of the best practice and guidance material available through CANSO. In addition, corporatising or commercialising ANSPs will help to create the business models needed for upgrading the current ATM infrastructure.

Regulation

To modernise ATM, regulation has to be performance-based as much as possible.

It is important to recognise ICAO's role in this – international standards-setting to regulatory approaches by States are essential in enhancing safety, efficiency, interoperability and global harmonisation in ATM but it must be more responsive to rapid technical, operational and even political change.

CANSO is asking States to adopt five key principles of better, performance based regulation. Regulations should be: proportionate, accountable, consistent, transparent and targeted. Regulation must also be updated to allow the safe introduction of new entrants to airspace.

Conclusion

With increasing threats of congestion and complexity, we must ensure the appropriate infrastructure is built on the ground and in the air.

We need States to invest in modern, efficient ATM infrastructure to cater for aviation growth and to ensure they have the right infrastructure to reap the economic benefits of aviation.

This investment will act as a conduit for further connectivity, social advancement, trade and tourism worldwide.

ANSPs, the aviation industry, ICAO, States and CANSO have to cooperate to modernise ATM and to ensure the most effective use of airspace.

I wish to emphasise that we know what to do and how to do it at the technical and operational levels – the barrier so far has been the lack of political will and commitment of States to work together on a regional basis. So, we urge States to provide this joint political commitment, set the frameworks and ensure the funding – and then allow the ATM experts to deliver.

CANSO will lead for the ATM industry and we look to ICAO to also take a wider leadership role and for States to collaborate proactively on regional airspace initiatives such as MAEP.

Thank you.