



# **The Third ENRI International Workshop on ATM/CNS**

19-21 February 2013  
Miraikan, Tokyo, JAPAN

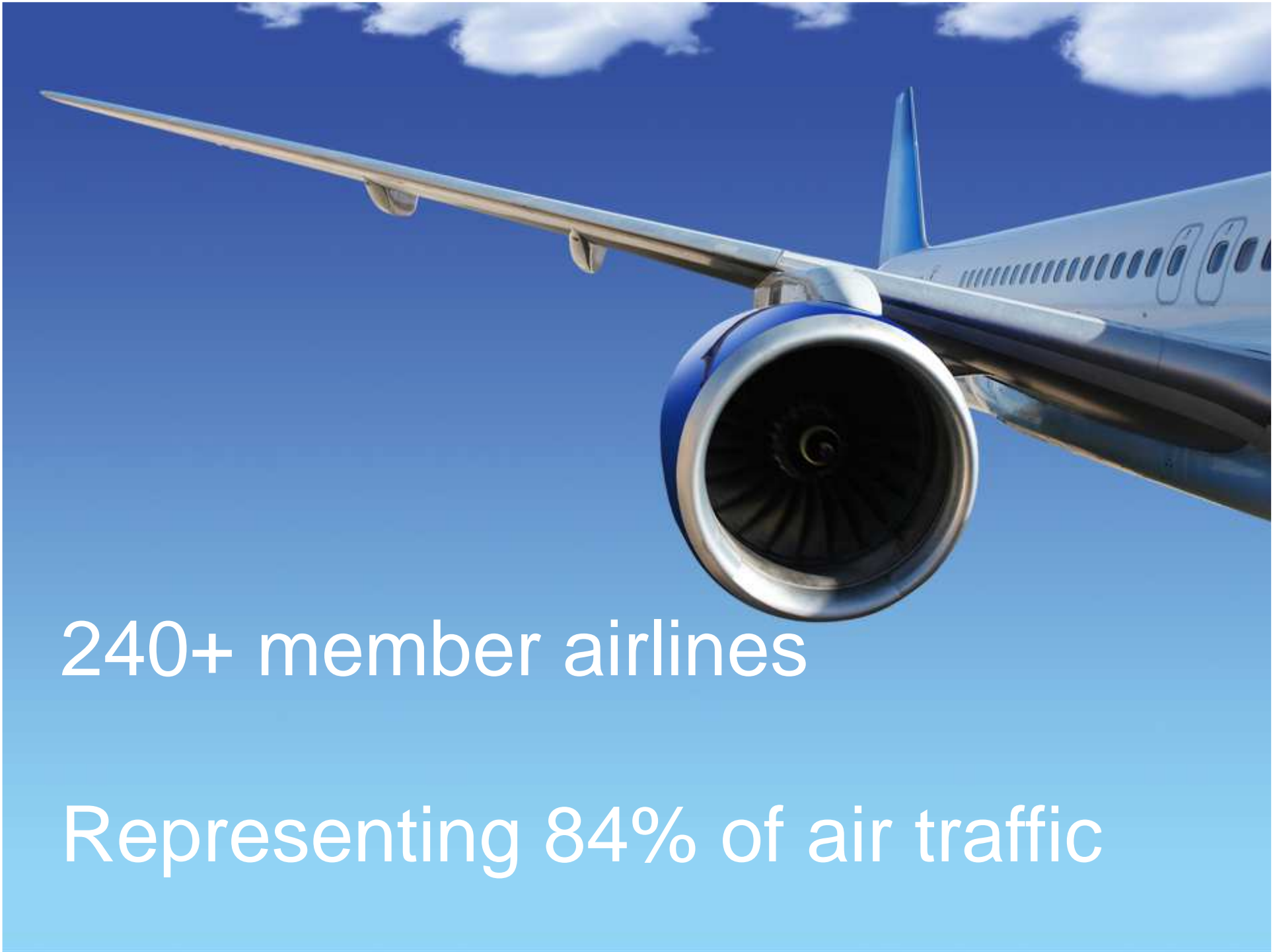
[ENS-007] Aircraft Operator's ATM Overview

**Blair Cowles**  
Assistant Director: Safety, Operations and  
Infrastructure – Asia Pacific

IATA's mission is to represent, lead and serve the airline industry

Represents airlines' interests to governments & international organizations





240+ member airlines

Representing 84% of air traffic



# SO&I Offices Worldwide



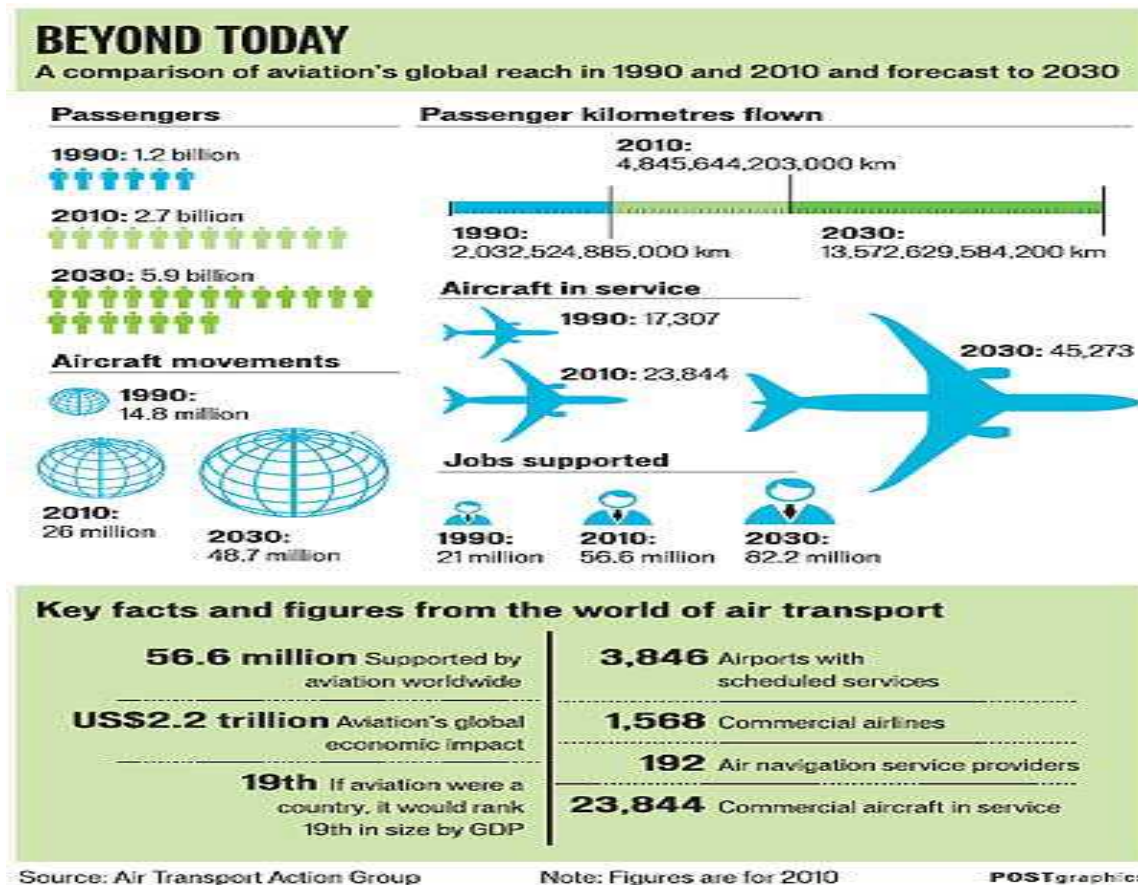


## Importance of Air Transport

- Connects the world's cities with over **36,000 routes**
  - Flies over **2.8 billion passengers**
  - Flies **48 million tonnes** of freight annually worth \$5.3 trillion (35% of world trade)
  - Generates a **total of 56.6 million jobs** globally with direct employment of over 8.4 million
  - Economic footprint (direct, indirect, induced and tourism catalytic) estimated at **\$2.2 trillion**, equivalent to 3.5% of world GDP
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# Importance of Air Transport





## Market Forecast

**GROWTH!**

Airplanes in service 2011 and 2031			Demand by size 2012 to 2031		
Size	2011	2031	Size	New airplanes	Value (\$B)*
Large	790	1,030	Large	790	280
Twin aisle	3,710	9,110	Twin aisle	7,950	2,080
Single aisle	12,610	27,430	Single aisle	23,240	2,030
Regional jets	2,780	2,210	Regional jets	2,020	80
<b>Total</b>	<b>19,890</b>	<b>39,780</b>	<b>Total</b>	<b>34,000</b>	<b>4,470</b>

\*\$ values throughout the CMO are catalog prices.

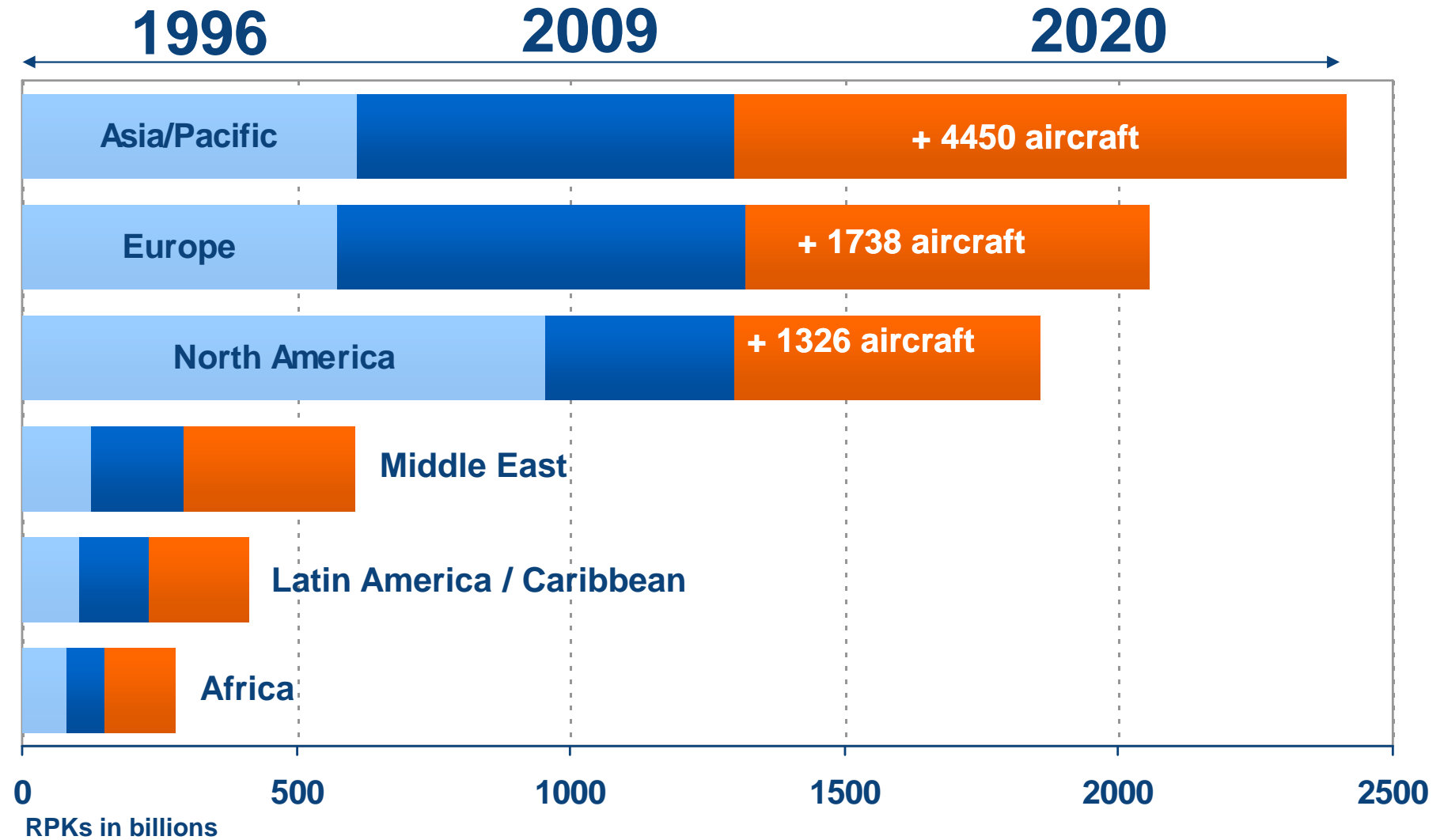
**Current Market Outlook  
2012-2031**

A blue and white commercial airplane flying over a stylized green and blue landscape.





## ACTIVITY GROWTH







## Safety, Operations and Infrastructure (SO&I)

To promote safe,  
secure, efficient and  
economical air transport

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# Safety



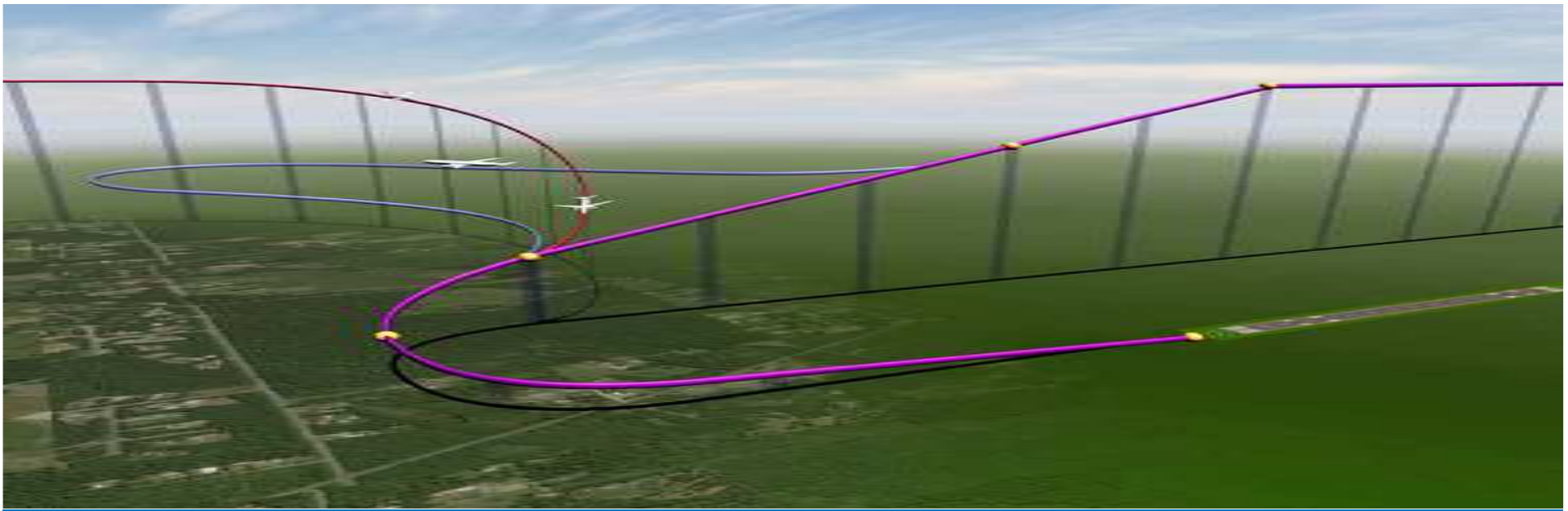


# Operations & Infrastructure



# Infrastructure Enhancements

- Performance Based Navigation Implementation
- Continuous Descent Operations
- Continuous Climb Operations



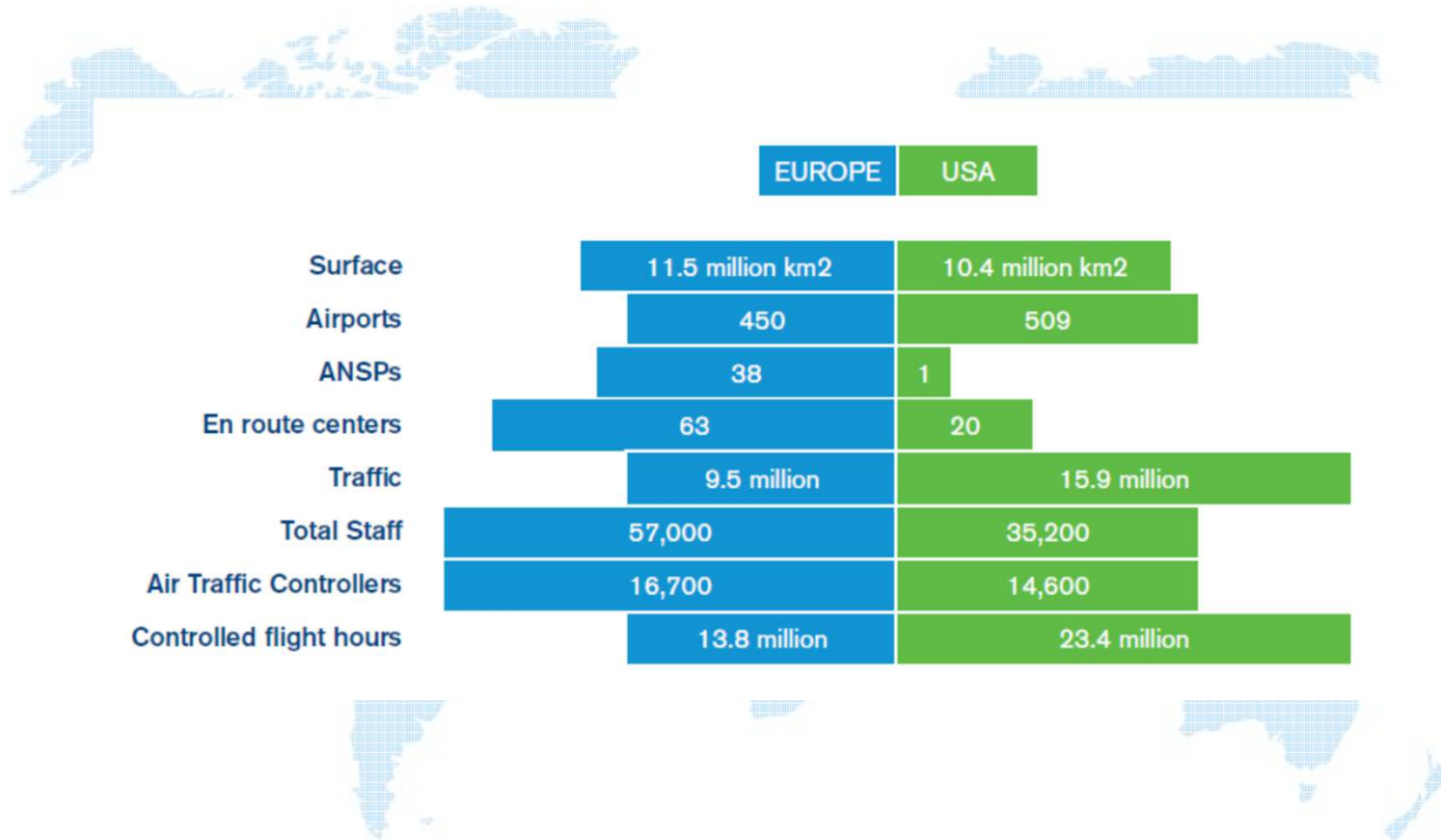


The lack of global harmonization affects the bottom line

# Air Traffic Control



Fragmentation  
Inefficiencies  
Delays  
Sub-optimal routes  
**expensive**







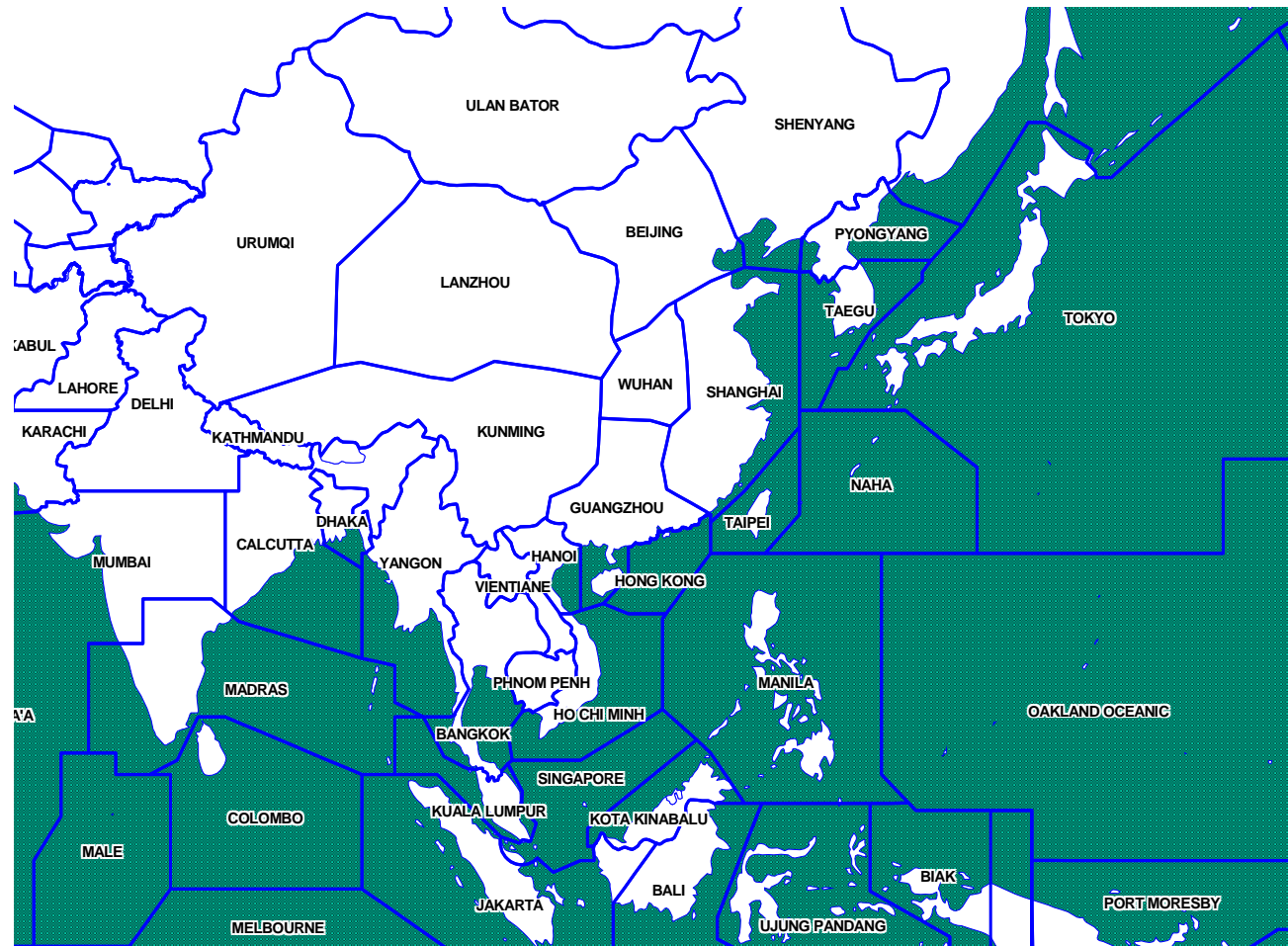
# Harmonization

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**The World's largest aviation market**



And in 2030....?





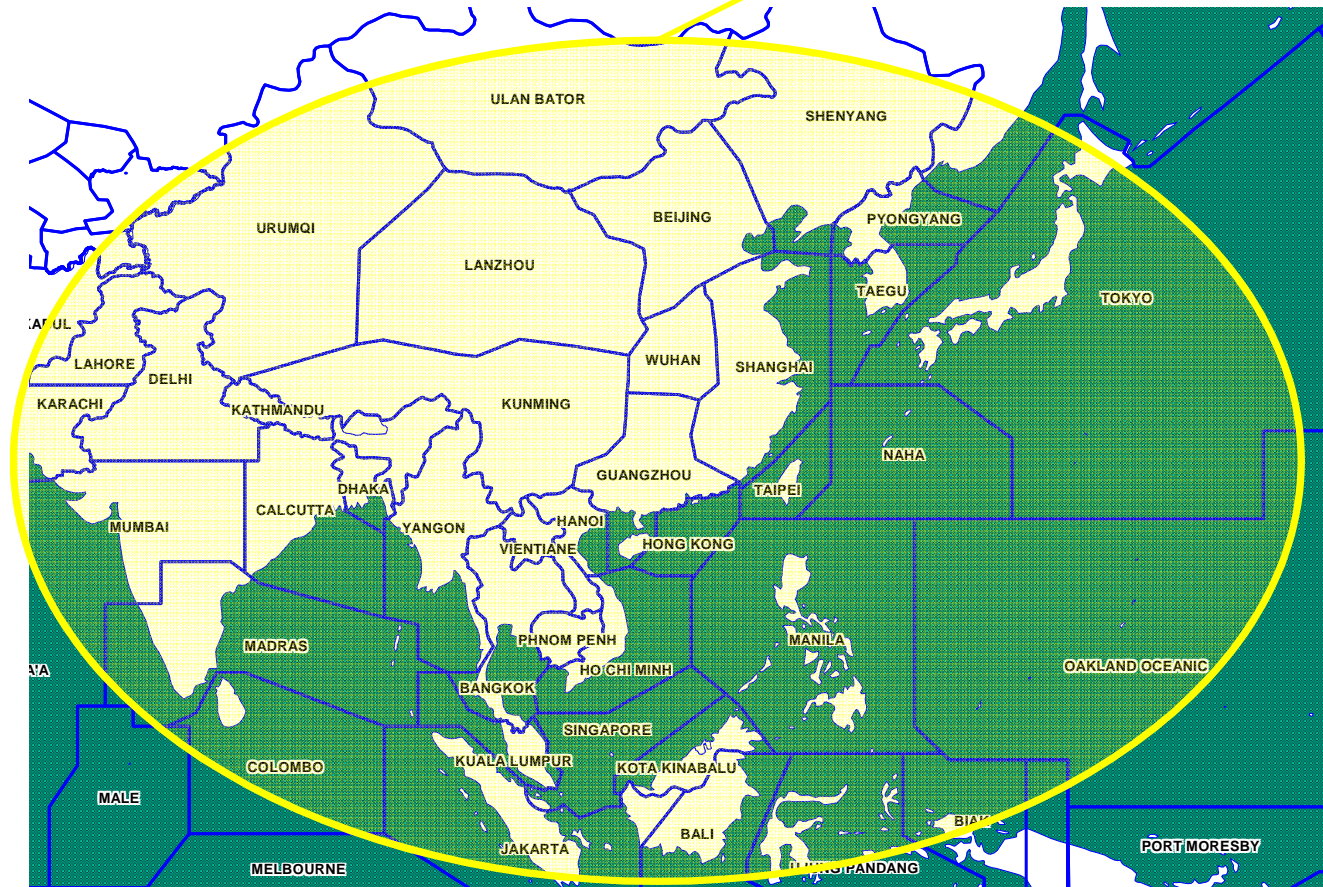
And 2030....?







# Seamless ATM







# Seamless Asian Skies Vision

A safe, uniform, and sustainable Asia Pacific aviation infrastructure for 2020 and beyond

- Harmonized, Interoperable, regional network of air navigation services
- Political Leadership & Mandate required



# Seamless Asian Skies Strategy

- ICAO plays a vital role
  - Future concepts
  - Regulation and guidelines
  - But States responsible for implementation.





# Seamless ATM Planning

- The Global Air Navigation Plan
  - The Global Aviation Safety Plan
  - Asia Pacific Regional Air Navigation Plan for Seamless ATM
    - The Aviation System Block upgrades
  - ***Capability driven – not technology led***
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## Plan for seamless ATM

- Seamless NOT Single
  - Collaboration is the key component of success
  - Short term action required NOW
  - Plan for the future growth
  - Consider future Regional structures to manage the transition
  - Issue are not technical but institutional
  - NETWORK MANAGEMENT ACROSS ASIA PACIFIC
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# The challenge for States today

## ➤ Immediate actions

- Drive infrastructure improvements in States and between States

## ➤ Future planning

- Commit to ‘Seamless ATM in Asia Pacific’

- Challenge is not technical but institutional

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**Questions?**