

# ASEAN REGIONAL ROLE IN ATM

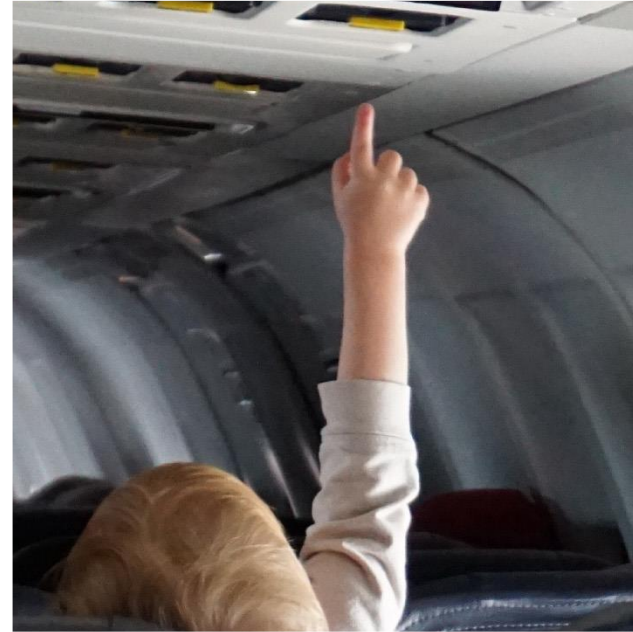
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# ASIA PACIFIC – AVIATION CONTRIBUTION

The economic contribution of aviation is significant to regional economies:

**Total Impacts** (Direct, Indirect, Induced and Wider Economic Benefits):  
**33.7 million jobs** and **USD \$705 billion in GDP**.

**Relative Scale of Impacts:** The total employment impacts equate to roughly  
**1.4% of the total employment** base in Asia Pacific and **3% of the region's total GDP**.

## **Future Impacts:**

By 2035, air transportation in Asia Pacific is expected to support nearly **72.3 million jobs** and nearly **USD\$ 1.3 trillion in GDP** if capacity in the region is not constrained, an increase of 215%.

## **Potential impact of expanding airport capacity:**

The value of future investment in airport capacity in the next 20 years is estimated to be **23.8 million jobs** and **USD \$399 billion in GDP**, 33% of the potential gain in terms of jobs.



# ASIA PACIFIC

Growth will continue in our region

How do we manage this growth ?

CAPACITY

Airspace and route design

Seamless operations

Seamless Operations – IATA study in 2014 shows potential for over USD3B in savings with implementation of ASPAC Seamless ATM Plan and significantly more to Regional economies



# AIRLINE PERSPECTIVE

We wish to support the desire to travel in the Region

We need a sustainable business model

We need predictable services and procedures



We need ANSPs to maximise capacity to support growth

We need ANSPs to work together across Borders to provide seamless, interoperable operations and services



# ASIA PACIFIC – SOUTH EAST ASIA

## CAPACITY

LATENT CAPACITY (compared to EUR and USA)

40%?

Airports are a choke point

Default to LOWEST COMMON  
DENOMINATOR



## LINKED UP THINKING AND PLANNING

Sub Regional Airspace Blocks

Whole of route planning

Data sharing to enable SEAMLESS  
OPERATIONS

# SOUTH EAST ASIA SEAMLESS OPERATIONS

## SILO THINKING

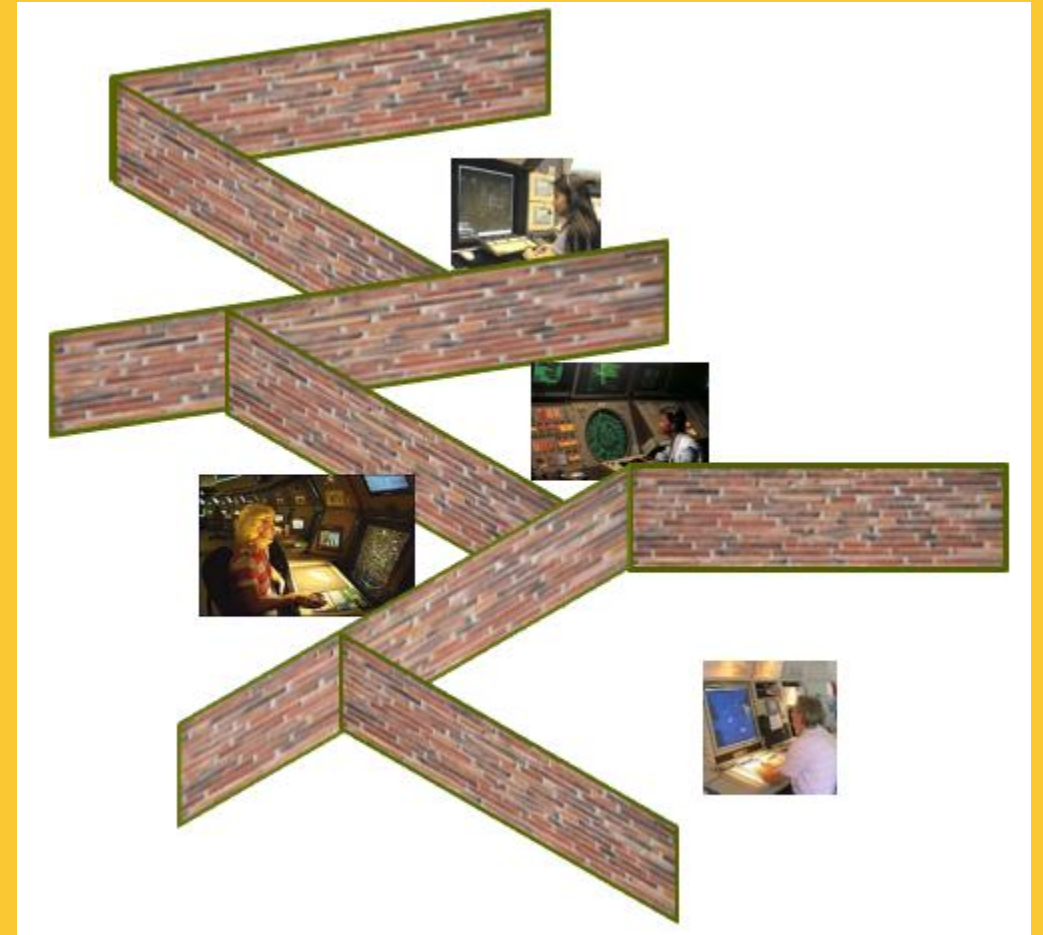
## SLOW PROGRESS

Cross Border and 'whole of route' planning and implementation is challenging

Implementation of the APAC Seamless ATM Plan targets is very slow regionally

## ASEAN - WHERE TO FROM HERE

ASEAN has the opportunity to lead seamless development and implementation





# ASEAN





# ASEAN

## POLITICAL MANDATE FOR PROGRESS

The ASEAN Leaders' Vision Statement at the end of 32nd ASEAN Summit emphasized the importance of connectivity.

It reiterated the governments' commitment towards a **Seamless ASEAN Sky** to help airlines operate within ASEAN in an integrated fashion.

**The governments also promised** to harmonize safety standards and **increase air traffic management capacity**

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# ASEAN

## ATM MASTER PLAN

In 2017, ASEAN adopted an Air Traffic Management Master Plan to facilitate movement of aircraft across the member countries.

The aim was to build **airspace capacity** and reduce delays and operational costs for the airlines.

## BLOC PROGRESS

Opportunity for ASEAN states to take a lead in the region toward seamless operations



# ASEAN

## Critical Regional Bloc

Can take a leadership role in Cross  
Border Air Traffic Management &

Seamless operations and services

Require collaborative and interoperable  
infrastructure solutions





# SUMMARY

## To manage Demand

Seamless/interoperable systems and services required

“Linked Up” planning and thinking needed

Cross Border/sub regional solutions require collaborative and interoperable infrastructure implementation

## SLOW PROGRESS

Cross Border solutions are challenging

Progress slow

ATFM and small bi lateral progress

ASEAN?

## WHERE TO FROM HERE

ASEAN has opportunity to lead the region

Political mandate

ATM Master Plan

IATA support

Lets do it!



Thank you

