

ATM: Challenges and Realities

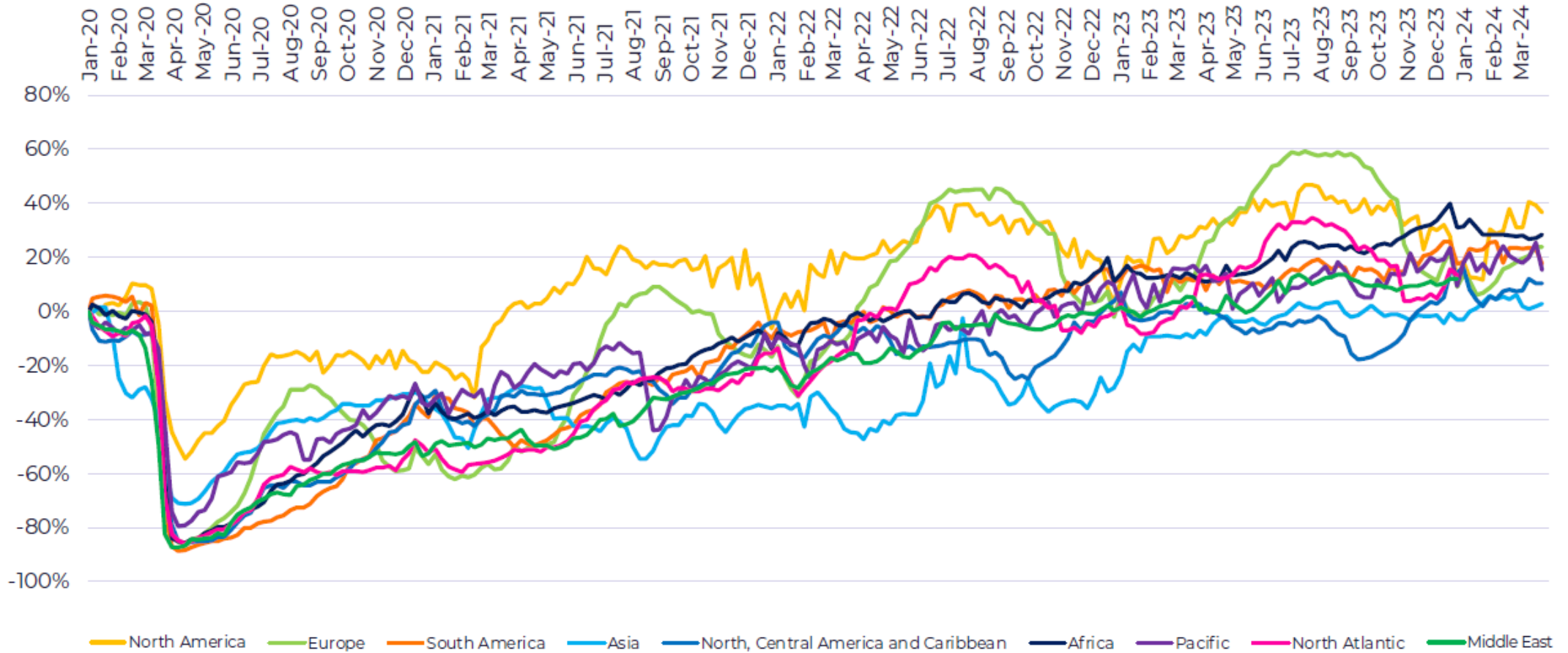
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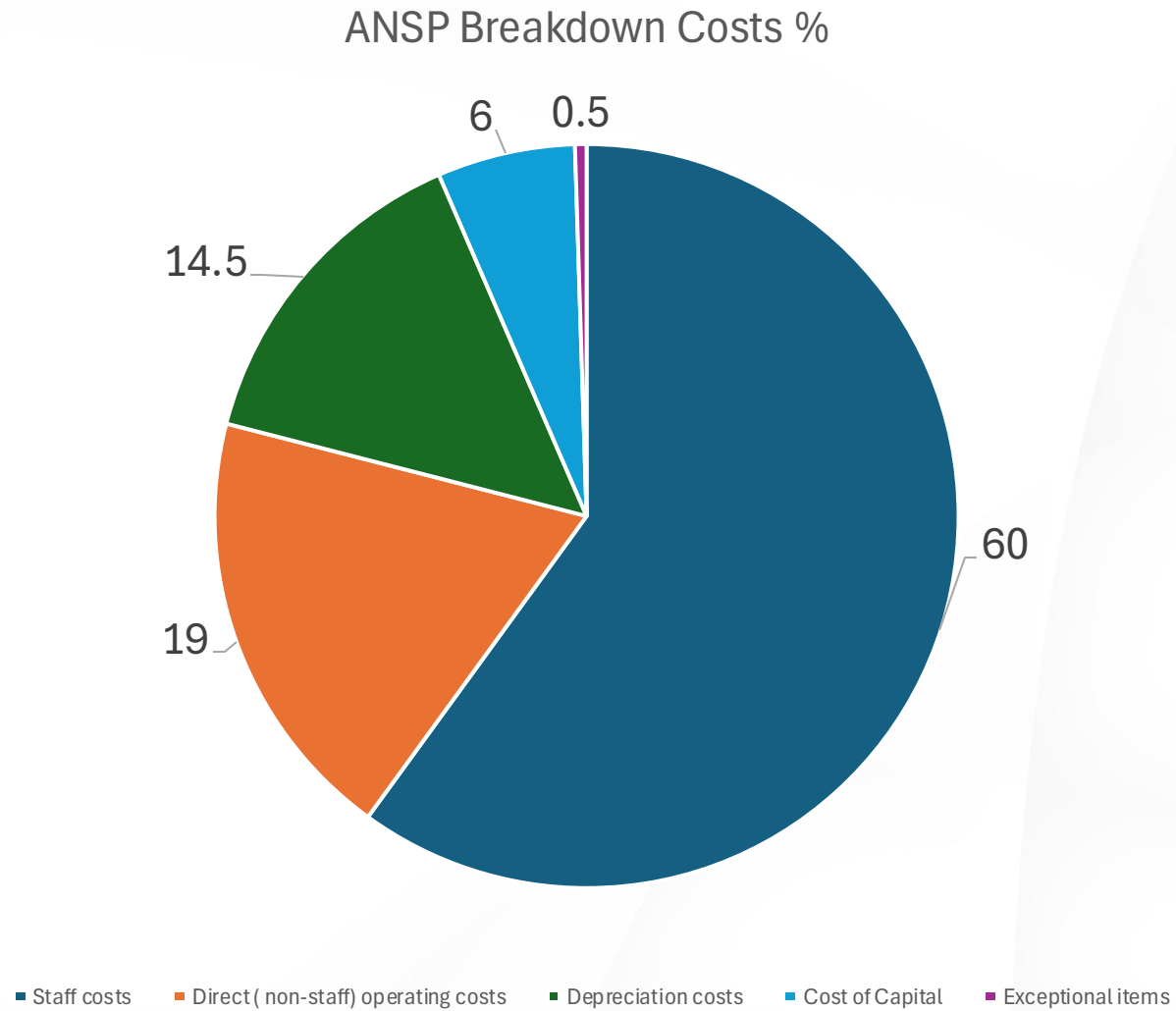
Regional Traffic



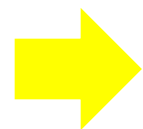
ATM Realities

- Volume business with high fixed costs
- Less scalability than other parts of the sector
- Need to keep all airspace open and all services available even during traffic low points

ATM Realities



Pandemic Impact on Performance



Safety (LOS / accident per million flights)



Quality of Service – (flight efficiency /ATFM delay / excess fuel burn)



Productivity (IFR flight hour per ATC hour)

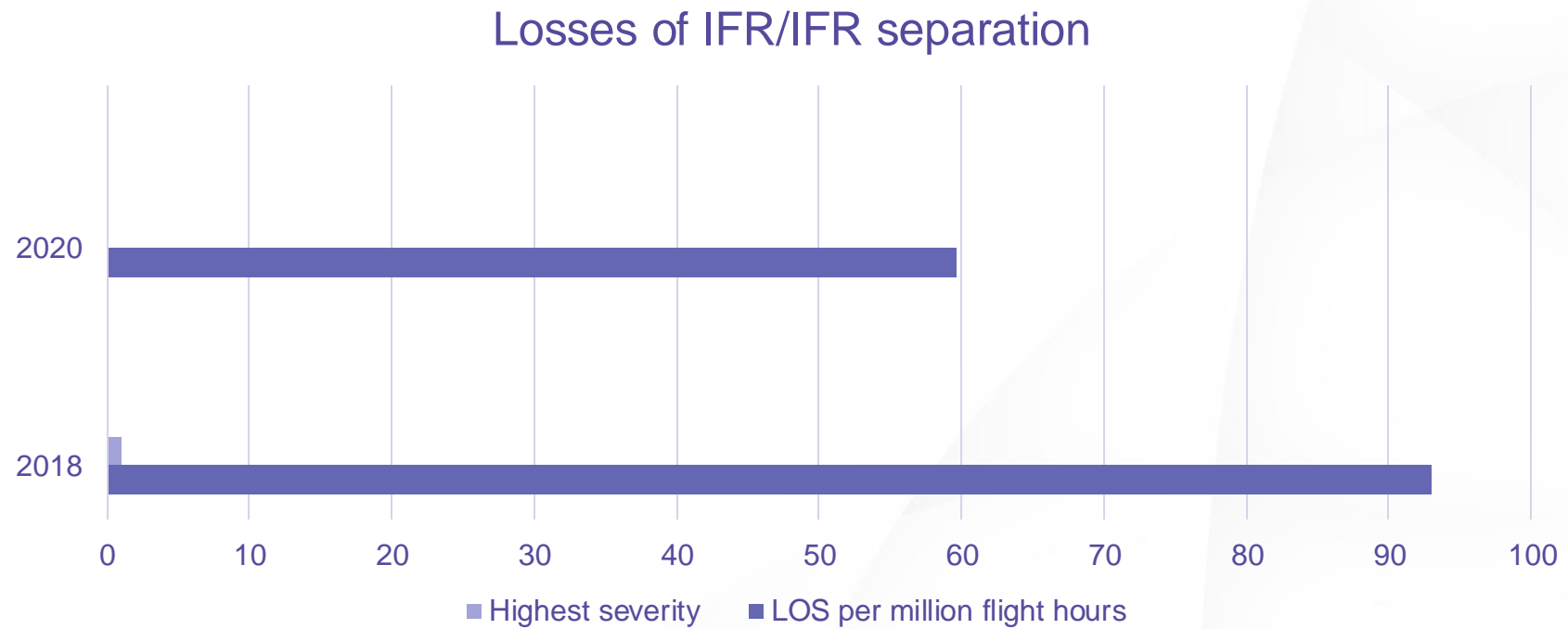


Cost efficiency (costs per IFR flight hour)

Safety

ATM metrics

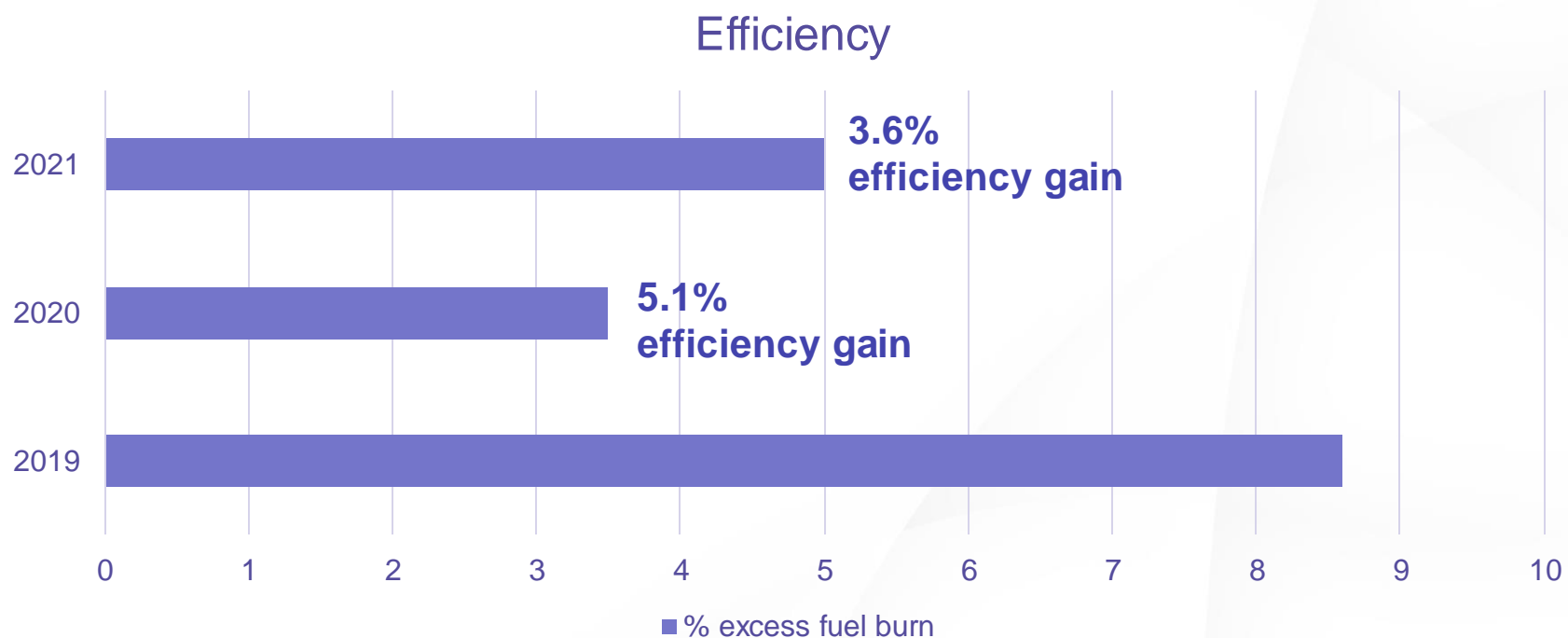
- Reduction in LOS risk but mixed results in other areas.



Flight Efficiency

No common reported global metric

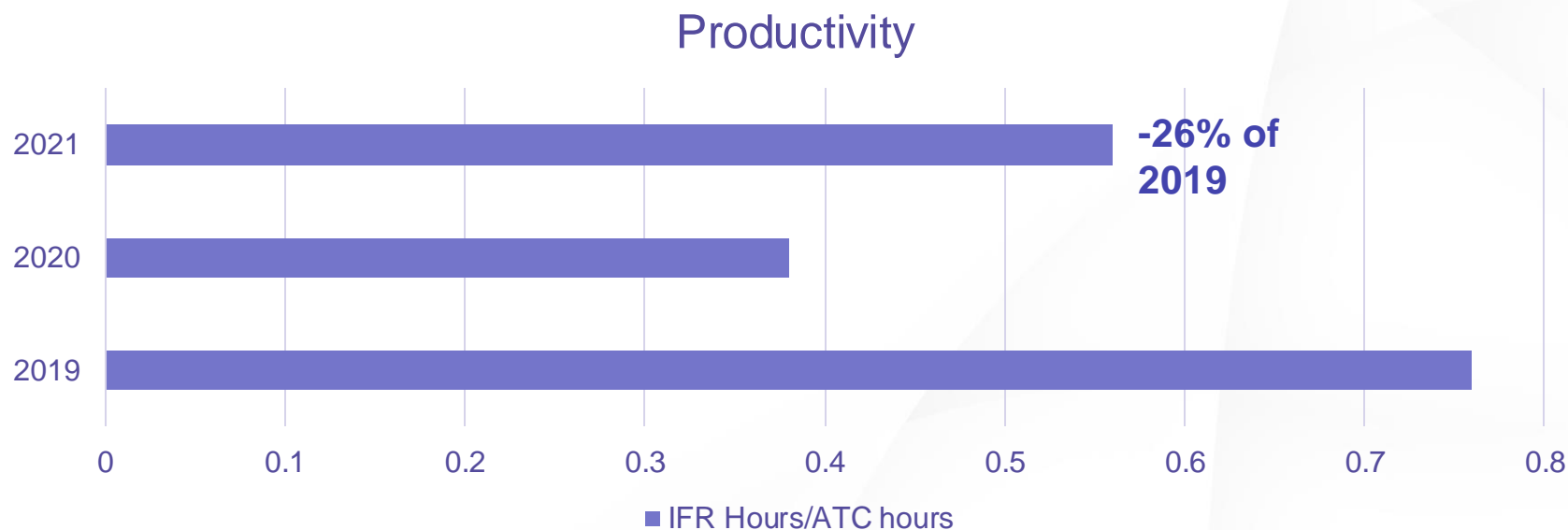
- The excess fuel burn metric used in Europe calculates the fuel inefficiency corresponding to the actions of all stakeholders. As traffic fell and congestion lessened, institutional restrictions were lessened and trajectories were optimized.



ATCO Productivity

IFR Flight Hours per ATC in Operations Hours

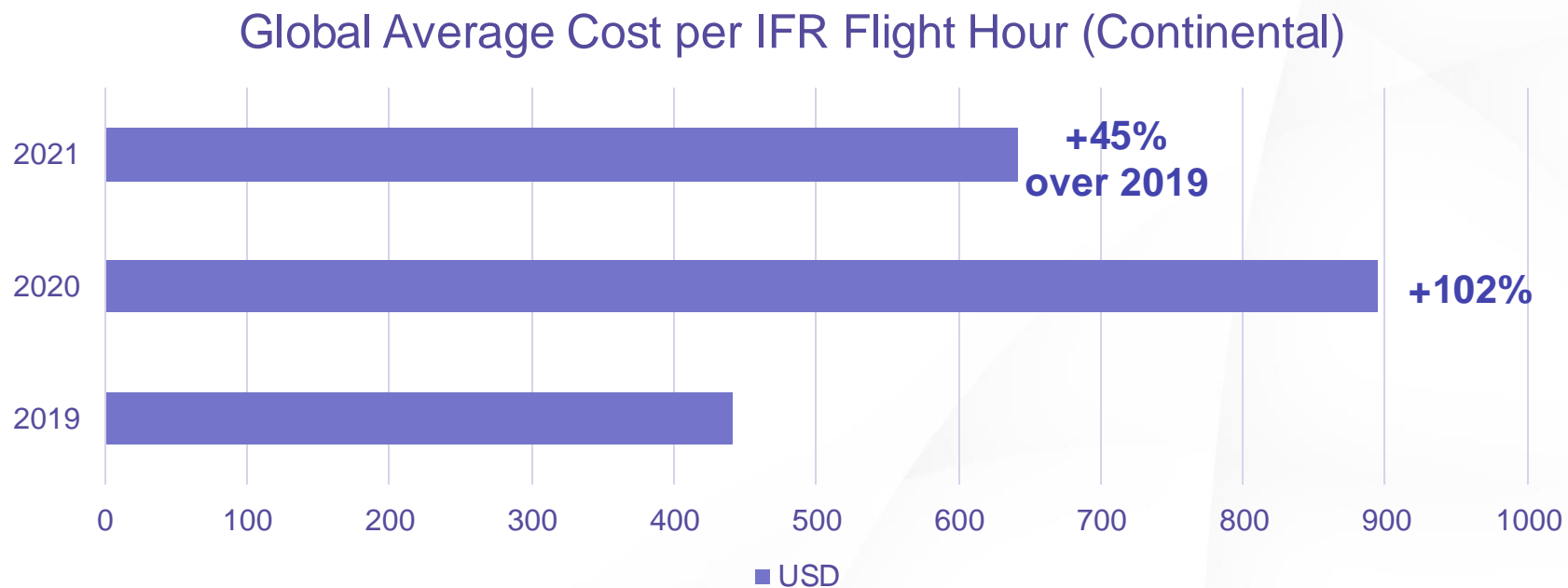
- In the decade between 2009 and 2019 ATCO productivity 20%.
- Average ATCO annual working hours fell in 2020, largely due to reductions in overtime and new team staff rostering approaches. But not surprisingly, there was a material decline in ATCO productivity as measured by IFR flight hours per ATCO in operations hours.



Global Cost Efficiency

Cost per IFR Flight hour (Total ANS costs / Annual IFR flight hours)

- Over the past decade the global average cost per IFR flight hour had trended downward, falling by 10 per cent in the past decade.



Meeting the Challenge of Growth



Urgency of expediting investments for growth challenges.



Emphasis on meeting ambitious climate targets.



Estimated investment required by ANSPs for operational efficiency benefits.



Importance of modernizing airspace infrastructure.

Important factors to consider on the ANS charges discussions



CANSO Member Survey

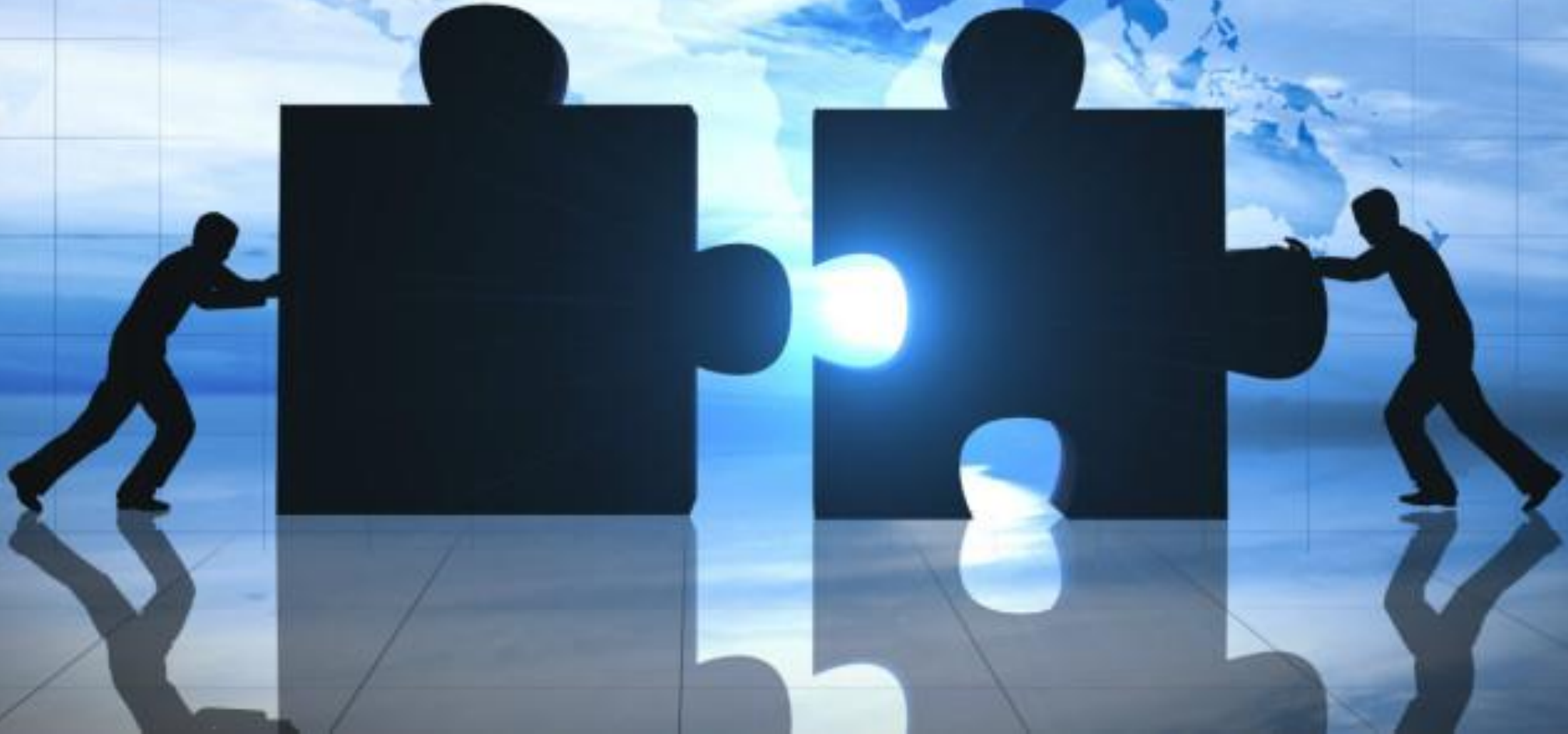
- 74% of ANSPs accessed commercial loans
- 33% received government assistance
- Only minor downgrading of credit ratings
- 86% cut CAPEX (average 50% cut but for 25% cuts were >75%)
- most ceased ATC training for a time

Factors going forward

- Passenger demand remains strong, driving growth
- Revenue environment remains strong, despite inflation
- ATS Charges will go back down, but not right away
- Sustainability challenges will require investment and modernization
- Lost investment years and staff shortages a risk as traffic grows

Collaboration

- ✓ ICAO Doc 9082 4 Key Charging Principles
- ✓ Consultation – Constructive Engagement





THANK YOU

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