

An ANSP View on the Future of ATM in Europe

Rüdiger Schwenk

DFS

Head of International Affairs

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1. Changing Environment

- **How can you live without having something unknown in front of you?**
 - Look at today
 - From the 1950s (car price vs. airfare FRA-NYC)
 - From the 1960s (Supersonic Transport predicted)
 - From the 1970s (Oil crisis, Club of Rome report)
 - From the early 1980s (US-USSR tensions)
 - From the 1990s (end of the USSR and Warsaw pact)
 - Would you have thought that security is such an issue today?
 - or that hub airport Dubai competes with Frankfurt?



1. Changing Requirements and Demand

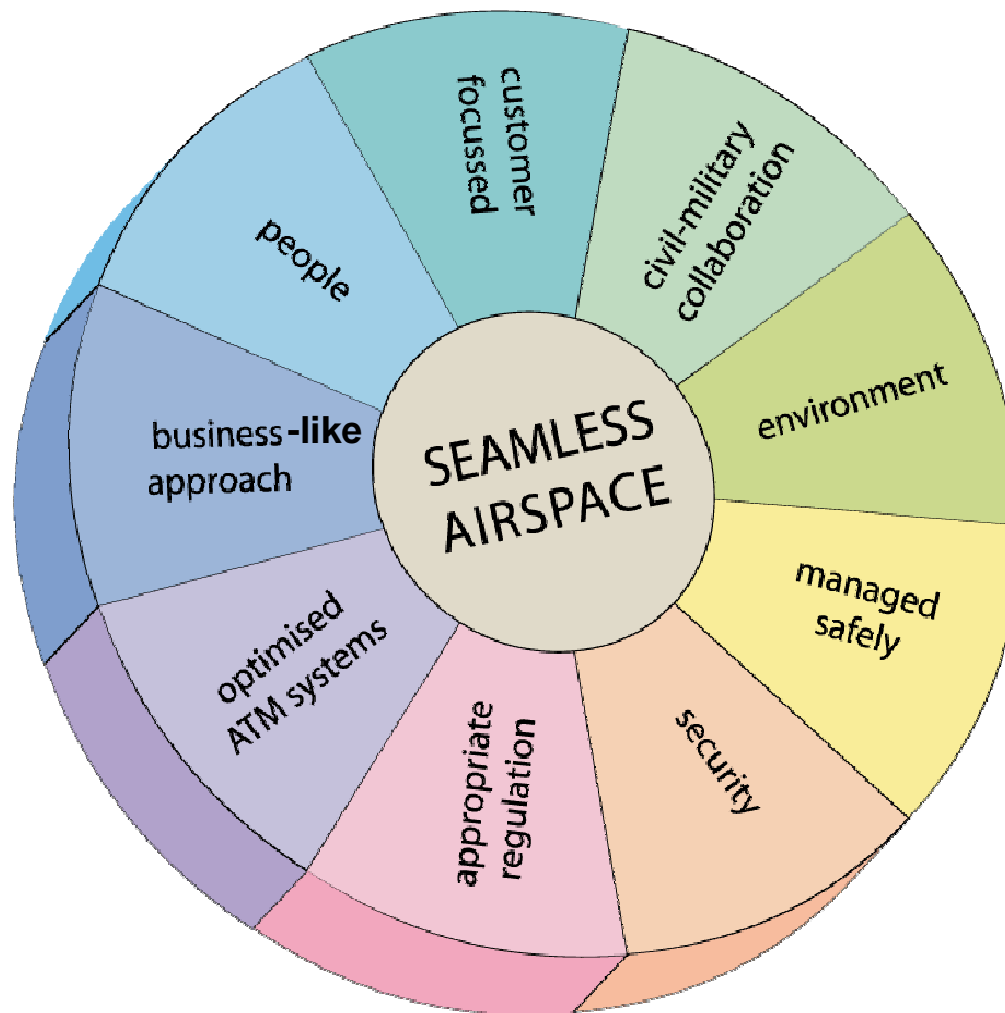
- **9.2 mio flights in 2005**
- **On a peak day**
 - More than 30.000 commercial flights
 - 200.000 GA flights
 - ??? Military flights
- **(Political) Objectives for 2020:**
 - Enable 3 times more flights
 - Improve safety by 10*
 - 10 % less environmental impact
 - Reduce ATM cost (per flight) by 50 %

2. CANSO – The Voice of the ANSPs

- **Global Membership (46 ANSPs, 36 Associate Members)**
- **The „Trade Association“ of the ANSPs, representing us, e.g. in ICAO, Eurocontrol, EU (ICB, Social Dialogue ...)**
- **Offices in Amsterdam (HQ), Brussels and Montreal**

- **CANSO View on ANS in Europe gives a consolidated input of Members' view on key issues in Europe**
- **CANSO Global Vision provides an overview about key directions of change expected globally**

CANSO Global Vision



1.1. Future of ATM Use Airspace as a Common Resource

The States are the owners of the airspace. The ANSPs are designated for guaranteeing the safety and performance of the air traffic network. Therefore the designation needs to be for a sufficient period of time to ensure the financial sustainability of their operations.

ANSPs have a key responsibility in managing airspace which they shall exercise on behalf of the States by :

- **Optimising airspace structures as a key element for network capacity development**
 - Creation of FABs through co-operation of ANSPs will lead to an optimized airspace structure
 - Technology development will enhance en-route operations
- **Increasing airport throughput and enhancing punctuality**
 - enhance co-operation with customers and partners in airport operations (i.e. airlines, airport operators etc.), e.g. through introduction of CDM, SWIM etc
 - technological developments to increase capacity at airports
 - develop partnership agreements to agree on procedures to enhance capacity, punctuality and related investments

1.2. Future of ATM

Use Airspace as a Common Resource

- **Promoting the integration of civil-military airspace use for an optimum airspace design**
 - enhanced concept for the Flexible Use of Airspace up to complete civil/military integration if appropriate
 - The need for increased capacity and efficiency may require an adjustment of civil-military working arrangement

1.3. Future of ATM

Promote a new co-operation in the air transport sector

- **Increase the contribution of ATM in the value chain by stronger co-operation with other aviation sectors**
 - Co-operation in the ICB and EU social dialogue partnership on key ATM-developments in the European Community
 - Commit to SESAR for the development and implementation of the European ATM roadmap keeping global developments in mind
 - Co-operation with the airspace users will be enhanced in a partnership approach and a performance based system; the cooperation on European level needs to be complemented globally, locally and sub-regionally;
 - Improve cooperation with airports
 - Add value to the business of customers, airports and society at large
- **Develop and continue to improve the relationship between regulators and ANSPs**

1.4. Future of ATM

Promote a new cooperation in the air transport sector

- **New synergies should be sought through enhanced cooperation between ANSPs**
 - Consultation and partnership agreement with customers in a balanced manner :
 - develop an agreed understanding of customers' requirements
 - develop performance targets and measures
 - consultation aiming at reaching common understandings on investment and implementation plans

1.5. Future of ATM

Improve Performance and Cost-Effectiveness

Apart from the commitments ANSPs individually have towards optimising performance and cost-effectiveness, there are four main areas where ANSPs must and shall co-operate in order to enhance performance and cost-effectiveness at network level as outlined in SES regulations

- To improve network performance through the development and implementation of Functional Airspace Blocks
- To reduce fragmentation in ANS through co-operation, alliances, joint-ventures or mergers of ANSPs.
- To improve Pan-European network functions and Cooperative Network Design and evaluate their efficiency and effectiveness through business-cases and increased involvement of ANSPs
- Working together to achieve harmonisation/standardisation of methods and procedures

2.1. FABs

ANSPs work for the acceleration of FAB implementation

- **CANSO supports the “bottom-up” approach to FAB creation involving all stakeholders**
- **FABs should have economic/operational benefits to customers**
- **FABs should include all airspace of the area involved**
- **States have an important role to play in the process. It is important that States at regional level share common objectives and visions.**
- **The European Commission can contribute to change by taking initiatives to address legal and institutional hurdles**
- **Public funding should be available to enable change**

3.1. SESAR

Make SESAR an integral part of ATM development and implementation

CANSO actively supports SESAR provided that:

- It is performance oriented, not technology oriented, based on business cases
- ANSP and their customers are in the major decision-making role in the SESAR Governance structure as they bear the significant business risk
- There is no duplication with existing structures and working arrangements
- Funding of SESAR is transparent and has no adverse effect on ANSPs business plans, nor on user charges
- ANSPs retain management control of the services and infrastructure needed for safe and efficient operations

3.2. SESAR

Make SESAR an integral part of ATM development and implementation

- **SESAR must take an integrated approach comprising research, development and implementation**
- **SESAR to get the buy-in of all ANSPs in the master plan during the Definition Phase.**
- **ANSP/Industry to be actively involved and drive any update of the Master Plan**

4.1. Institutional framework – general principles

Improve the effectiveness of the European ANS governance structure

- **CANSO supports the EU's role as legislator/regulator for ANS in Europe, subject to subsidiarity where appropriate, within the SES regulations.**
- **CANSO supports making EASA the safety authority/regulator for the whole air transport sector in Europe.**
- **The role of EUROCONTROL needs to be reconsidered in light of the Review of SES, the Roadmap on the future of Eurocontrol, the High Level Group report, the implementation of SESAR and the authority given to EASA.**

4.2. Institutional framework – EUROCONTROL Future Role of EUROCONTROL within SES

- **CANSO continues to support the EUROCONTROL Agency in playing an important role in providing support to the development, harmonisation and operation of European ATM**
- **The SES regulations requires an adjustment of the role of the EUROCONTROL Agency to reflect the revised needs, competencies and responsibilities of the stakeholders. The ANSPs wish to participate in that process:**
 - Support to regulation (ANSPs not directly involved)
 - Cooperative network design (of major interest to ANSPs, requires ANSP involvement)
 - Pan-European Functions (of major interest to ANSPs, requires ANSP involvement)
 - Regional ATS provision to be run by ANSPs, separate from EUROCONTROL
- **The Governance of the Agency needs to be strengthened and adjusted to the new role and environment**
 - Improved participation of the ANSPs for the pan-European functions and the Cooperative Network Design
 - Relaunch the current ANSB towards a revised ANSB with enhanced decision-making processes and delegated powers from the Provisional Council
 - Modernise the management structure of the Agency (accountability, cost-effectiveness, efficiency)

4.3. Institutional Framework – EASA

Improve the effectiveness of the European ANS governance structure

- CANSO supports the future role of EASA as being the central safety regulator for ATM in Europe
- Avoid duplication of regulation and conflicting regulation
- There needs to be a clear division of tasks and responsibilities between the central and national level.
- There shall be no over-regulation
- The new system should have everything ready before changing the way it works with respect to the rules, procedures and resources
- The transition to a new regulatory environment needs to be smooth and effective, including adequate resources and funding
- Real ANSP involvement is needed for the development of regulations for ATM
- EASA responsible to audit NSA compliance with SES legislation

3. EU High Level Group on the Future of European Aviation Regulation

Report

***„European Aviation – A framework for driving performance
improvement“***

published 6.7.2007.

3. Recommendations of the EU High Level Group

- 1. EU as driving force in aviation regulation in Europe:**
 - EU as regulator
 - Ensure independence of regulation from service provision
 - DGCA's in EU to decide the strategy
 - Appoint a senior figure as 'Aviation System Coordinator'

- 2. Greater responsibilities for industry:**
 - Involve industry more systematically
 - Realign the governance of service provision functions
 - Competition for contestable activities

3. Recommendations of the EU High Level Group

3. Better regulation:

- Avoid over-regulation
- Full impact assessments and consultation

4. Drive improved performance:

- Set performance objectives
- independent performance reporting
- Facilitate application of market principles by unbundling and liberalisation of ANS
- Economic Regulation for monopoly elements in ANS

3. Recommendations of the EU High Level Group

5. Deliver the Single European Sky:

- Accelerate delivery of SES and SESAR
- Develop an implementation strategy and plan
- Introduce economic regulation to ensure ANSPs are incentivised
- Address hurdles to implementing FABs and task the Aviation System Co-ordinator to facilitate their progress
- Strengthen orientation of SESAR
- Develop pan-European ATM governance structure post the SESAR JU in 2013

3. Recommendations of the EU High Level Group

6. Empower and focus Eurocontrol

- Strategic and regulatory framework set by EU
- Focus on Pan-European Functions and ATM network design
- Give industry an appropriate role in governance
- Facilitate unbundling of activities through corporate structures or undertakings
- Prepare for governance and operational structures for the post 2013 SESAR deployment phase

3. Recommendations of the EU High Level Group

7. Address airport capacity

- Member states to provide strategies for addressing airport capacity issues
- Facilitate progress through the ‚Aviation System Coordinator‘

8. Deliver continuously improving safety

- Apply safety management systems consistently
- Empower EASA as single EU aviation safety regulator

9. Deliver environmental benefits

- Improved gate-to-gate ATM, Cleaner and quieter aircraft, Market oriented solutions (ETS)

10. Commit member states to deliver

- Implement commitments (SES)
- Encourage regulatory authorities to develop common approaches

4. Our expectation - the way forward

- **Resulting from the implementation of the recommendations of the High Level Group, we expect for ANS provision:**
 - Accelerated development of FABs
 - Economic regulation for provision of ATC services
 - Competition for „ancillary“ services (CNS, AIS etc.)
 - Integration of „Safety-Regulation“ in EASA
 - New Role and Governance in Eurocontrol
 - Streamlined with EU and EASA
 - Stronger involvement and responsibility of industry in decision-making
 - Stronger Consideration of environmental aspects in ATM

Three Pillars of Business

