

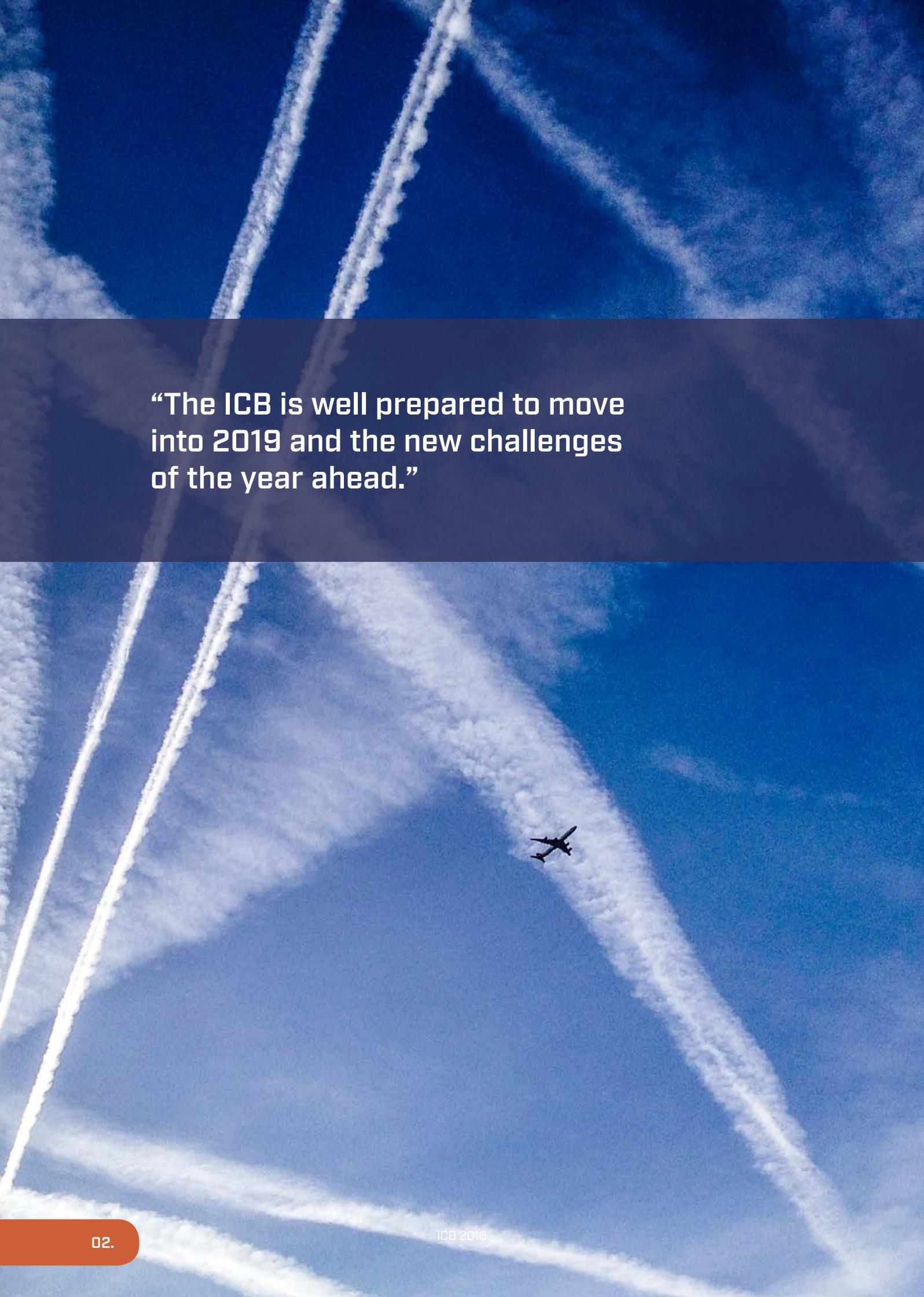
ICB

Industry Consultation Body

ANNUAL STATUS REPORT

2018





“The ICB is well prepared to move into 2019 and the new challenges of the year ahead.”



INTRODUCTION:

STRIVING FOR CONSENSUS

Air traffic has recovered well from the global financial crisis a decade ago, continuing the previous growth trend. As traffic has grown so have delays, and a capacity crunch is once again upon us. A new way of thinking and operating is necessary for European ATM performance and sustainability, and the European Commission is responding with a re-think of its vision for SES for a new incoming Commission.

To this end, the work and operation of the ICB has taken a noticeable shift in 2018 to better reflect and address the needs of industry. The ICB remains a fundamental forum for industry to engage with the Commission across the broadest range of stakeholders, as a single voice to influence policy direction.

As the ICB enters this new phase, the top priorities for the group will be in delivering strategic input based on the outcomes of the Commission's Wise Person Group and advising the Commission on how to address the capacity crisis. The new ICB AGM is ideally placed to set the year in motion, directing the ICB in key policy areas.

This Annual Status Report provides an overview of the main achievements of the ICB in 2018 (Section 2), the new look of the ICB for 2019 (Section 3) and the challenges ahead (Section 4).



THE YEAR AT A GLANCE:

THE ICB
IN 2018

This Annual Status Report provides an overview of the main achievements of the ICB in 2018.

3 PAPERS TO THE EUROPEAN COMMISSION

- INDUSTRY DEVELOPMENTS IN ATM CYBERSECURITY (2018)
- ICB POSITION PAPER ON ATM CYBERSECURITY (2018)
- INPUT TO THE ECAC WORKSHOP ON ATM MP UPDATE

2 PAPERS CURRENTLY IN DEVELOPMENT

- ICB VISION FOR SES | 2ND EDITION (DRAFT D)
- ICB POSITION PAPER ON END-TO-END ASSURANCE (DRAFT B)



9 MEETINGS OF THE ICB
(INCLUDING WORKSHOPS, TECHNICAL SUB-GROUP
& INSTITUTIONAL SUB-GROUP MEETINGS)

ON AVERAGE,
EACH MEETING
WAS ATTENDED BY

27 PEOPLE
(MEMBERS AND OBSERVERS)



ACROSS



27
ORGANISATIONS
(INCLUDING OBSERVERS)



LETTERS
TO THE EC,
ACCOMPANYING
THE PAPERS

New Terms of Reference for the ICB



Watch out for the [ATM Information Digests](#) and ICB Bulletins

Link: <http://www.icb-portal.eu/index.php/publications/atm-information-digest>

The top half of the page features a background image of several European Union flags waving. The flags are blue with a circle of twelve gold stars. The image is partially obscured by a dark blue horizontal band that contains the title text.

A YEAR IN BRUSSELS:

THE ICB
IN 2018

The work of the ICB is organized into three key streams in 2018: the revised vision for the SES (via 4 workshops); institutional topics (via the ISG), and technical challenges (via the TSG).

REVISED INDUSTRY VISION FOR SES

In the three years since the original ICB vision for SES was published (2015), the European ATM industry has moved with pace. Together with the re-emergence of the capacity crunch, new challenges have arisen – notably with drones – and key studies and audits have been completed, for example the Airspace Architecture Study and the European Court of Auditors Report on SES.

Originally intended as a living document in 2015, the need to revise the vision was clear and it will be used as a basis for advising the Commission as it reconsiders the SES policy framework in light of the new challenges it faces.

A series of four workshops have been held throughout the past year to develop the new vision. Within the SES regulatory framework, a focus on **seamless operation** was tabled and, with a cooperative mindset ensuing, the workshops proved to be fertile ground for developing the vision.

Frameworks on **Cooperative Culture**, **Service Provision**, and **Governance & Accountability** have been developed, aiming to: develop a culture that consistently delivers network benefits through contributions from all stakeholders; deliver an airspace able to flex and scale to handle cyclical demand of traffic; and establish an institutional landscape with clear assignment of roles and responsibilities, and relationships with SES and non-SES bodies.

Work on the vision will continue into 2019, with members committed to producing a revised vision.

INSTITUTIONAL WORK

With the ongoing work of the ICB Vision for SES, which in itself covers a number of critical institutional topics, and the wrap-up of a number of other topics, such as the European Upper Information Region / Airspace Architecture Study, IPER, and the short-term steps for the NM, there was limited scope of work for the ISG in 2018.

The single ISG meeting of 2018 was conducted as a workshop to support work on the **evolution of the ICB**. These discussions paved the way for an **updated and approved ICB Terms of Reference**. This included a shake-up of the organizational structure and meeting schedule (plenaries to AGM), and a change to the leadership structure.

The evolution ensures the ICB maximizes its value and maintains its position for influencing change.

TECHNICAL WORK

2018 has seen the TSG maintaining its high workload and continuing to cover challenging topics.

The ICB's latest position paper on **cyber-security** was approved in February 2018, updating the 2015 paper. The paper addresses three areas: governance and management; the regulatory response; and cyber-security in SESAR. In particular it recommends more funding to PJ19 for tools, training, guidance and expert support, independent systematic and enforceable review of solution cyber aspects at key milestones, development and maintenance of a top-down SESAR security risk assessment, and facilitation of a SESAR Security Policy addressing the link between development and deployment. The paper was accompanied by an updated information paper, summarising the latest developments in terms of legislative and regulatory changes, standardization activities and pan-European research and development in this fast-moving field.

With the **ATM Master Plan** Update Campaign kicking off at the end of 2017, the TSG had the opportunity to provide input at the consultation phase in 2018. The group developed a brief paper for the Master Plan ECAC workshop outlining industry's priorities and additional elements to be considered for the update.

The TSG also had the opportunity to discuss the Commission's **Common Project** plans. Members were seeking clarity on the timeline and consultation processes. With it being clarified that



the Commission would develop their own proposal on Common Projects, rather than a consultation on the SJU's proposal, the TSG eagerly awaits the outcomes and is ready to advise when needed.

Other topics discussed by the TSG have included **GNSS certification** and **implementation plans for the SPI IR**. Regarding GNSS certification, members recognize the need for approving the use of GNSS constellation elements, considering GNSS constellations themselves cannot be certified. For the SPI IR, the TSG was used to provide clarity between the Commission and Airspace Users as to how the upcoming 2020 SPI IR deadline will be managed. This will continue into 2019 with the SDM providing regular updates on their EU-wide implementation plan.

Finally, over the course of Q3 and Q4, the TSG has been discussing the challenges of **End-to-End (E2E) assurance**. As ATM relies ever more on digital and interconnected systems and users, the ICB will develop a position paper providing recommendations on managing E2E issues and next steps for progressing E2E assurance. Included in this will be the elements that must be considered for E2E assurance, covering factors within the regulatory framework, the necessary trade-offs, and 'new' concerns, for example service orientation, cyber-security, and the use of Machine Learning (ML) and Artificial Intelligence (AI).



A NEW-LOOK ICB FOR 2019

A change to the Terms of Reference in 2018 will see the ICB move to a more efficient and effective structure in 2019, with a single Annual General Meeting to be Chaired by the Commission replacing the plenary meetings.

The new AGM will provide a strategic focus for the ICB and ensure the group's relevance and importance to the industry remains high. The working groups (institutional and technical) will become more autonomous, with their own approval procedures for position papers and other advice.

The ongoing work to develop a new industry vision for SES (reopened from 2015) has seen consistently high and active participation across all ICB members, highlighting the importance of delivering the new vision to the Commission at a critical point in their deliberations.

In 2019 the ICB will also welcome a new (and restructured) Chair team, with elections taking place at the first AGM in February. The ICB Chair and ICB Vice Chair will now be formally appointed by the Commission and take up positions as the ISG and TSG Chairs respectively. They will continue to be supported by Vice Chairs.

The ICB will say farewell to Olaf Dlugi who has passionately led the ICB for over 6 years. As Chair of the ICB, Olaf has brought huge drive and commitment to the industry to positively embrace change, and under his leadership the ICB has never been more productive. In particular Olaf leaves his legacy with the impressive achievement of the ICB vision which was a catalyst in the sector for reconsideration of the direction of SES.

The ICB will also say farewell to Steve Williams, who has successfully led the Technical Sub-Group for the last 6 years, and is retiring from his position at NATS – we wish him all the best for his retirement!



THE CHALLENGES AHEAD FOR 2019

THE ICB
IN 2019

As we leave a year of change behind us, 2019 will also be one in which change will dominate headlines. A number of work streams will come to a head which have the power to increase momentum and significantly shape SES. They will need addressing and provide a perfect platform to feed the incoming Commission and Transport Commissioner.

FUTURE EPOCHS

Looking ahead for the new Commission, two significant time periods await the ATM industry; the start of RP3 – 2020 to 2024 – and the next multiannual financial framework – 2021 to 2027.

Preparations for RP3 are reaching a climax, with the new Performance and Charging Scheme regulation approved by the SSC in December 2018. The setting of RP3 targets is the next pivotal hurdle the industry must navigate. The targets will need to strike a balance between delivering the capacity industry needs and ensuring cost-efficient service provision, and there is space for the ICB to provide valuable input.

Furthermore, parliament has a key vote ahead of them in 2019 on the **Multiannual Financial Framework**. A set of new priorities have been published and they are due for approval in 2019 for their introduction in January 2021.

Ahead of these two periods, the **Wise Person's Group's** (WPG) output will be an important step in establishing momentum and preparing the work of the new Commission. Meeting with industry stakeholders and tying together their different positions, the group of industry influencers will provide clear recommendations on the way ahead. While the collective input of the ICB to the WPG has not been possible, their outcomes will have an impact on the ICB's work program and priorities.

SES IMPLEMENTATION

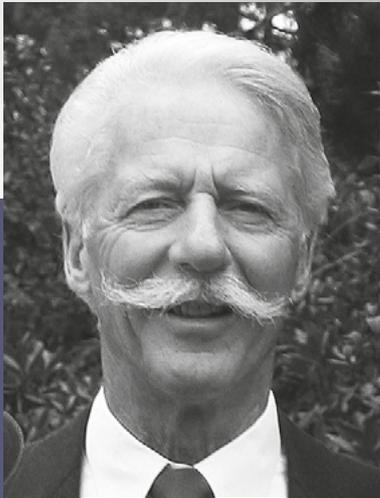
Following on from the ECA audit of SES in November 2017, which highlighted the positive culture change but also the lack of expected benefits of SES, the **ECA audit on SESAR deployment** will report in 2019. It will review the need and design of EU intervention in the deployment phase of SESAR, the management of EU funding allocated to it and the extent to which performance gains are actually being delivered. This will provide a clear insight into the effectiveness of current working arrangements.

Originally intended to be addressed in 2018, the ICB also eagerly awaits the outcomes of the Commission's work on the **CP2 proposal** and **PCP review**. The outcomes will impact front-line implementation plans and timely input from industry is imperative for stakeholder buy-in and meaningful change. The process delays are well documented, but the delays highlight the importance of proposing the right solutions. Taking time now ensures the greatest chance of success.

The **SJU's Airspace Architecture Study** outcomes will provide important next steps for supporting delay reduction through airspace organization, design and operational changes. With the results published at the end of January it will be another major catalyst for change throughout the industry.

A challenge with this study lies in tying it with the other jigsaw pieces of SES, not least the **European ATM Master Plan** update. The next edition will explore and address the challenges and opportunities in a new digital era of aviation, the role of SESAR in driving the digitalization agenda forward, and the synergies between the European ATM Master Plan and the EU's aviation strategy. The link between the ATM Master Plan and the Airspace Architecture Study is pivotal for providing a harmonized view of the future of European ATM. The ICB will support this process as part of their 2019 work programme.





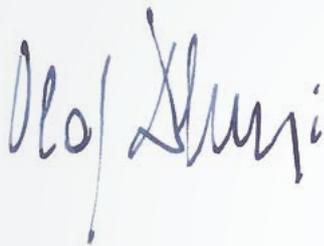
A FINAL WORD FROM THE CHAIR

2018 was a busy year for the ICB. As in the past, our work supporting the Commission in SES-related matters has been well received by DG Move. The relationship with EU Member States, represented in the SSC, has proven more difficult in a busy regulatory year for SES. The challenges of ATM can only be solved in a spirit of trust and partnership of all stakeholders, including the States, and we must find a way of working better together. The interests of European citizens who want to travel not only safely, but on time for an affordable price, must be prioritised over individual State interests.

The European Court of Auditor's report No 18 on The Single European Sky states quite clearly that the SES initiative, formally launched in 2004, has not produced the expected benefits. Over the years the ICB has advised the Commission in many areas where regulatory changes would bring substantial benefits to the operational stakeholders; the performance and charging schemes are good examples as well as the Network Function IR. Learning from the shortcomings of several IRs created in the past, there is a willingness to produce smarter and less prescriptive regulation in the future. The ICB is well suited, and prepared, to continue advising the Commission because the industry has to live with the outcome.

The ICB chair team has worked hard this year to build a closer relationship with the Commission, stressing the necessity and willingness to work closer together. Furthermore, the changes to the ICB ToR re-shaped the ICB to make it fit for the future. The ICB is of the opinion that its involvement in early stages of dedicated projects of the Commission would improve the efficiency and quality. The real needs of the industry should be made visible to the Commission and flow into the work. At the end of the day the European citizen would certainly profit from such a collaborative approach.

A new Commission is on its way in and, on top of it, big personnel changes in the SES Unit of DG Move. This comes at a time where not only are urgent actions required to avoid another summer of delays and a capacity crunch, but that strategic subjects in a number of areas must be dealt with to pave the way for a more stable future.



Below: L-R: Patricia Bier Vice-Chairwoman, Steve Williams TSG Chair and Michael Mowinski TSG Vice-Chairman.



ANNEX A:

ICB ACTIVITIES IN 2018

A.1 DELIVERABLES

During 2018, the ICB produced the following deliverables:

- ICB Position Paper on ATM Cyber-Security (Issue)
- Industry developments in ATM Cyber-Security (Issue)
- ICB Input to ECAC Workshop on ATM MP update (Issue)

The following two deliverables are currently in development:

- ICB Position Paper on End-to-End Assurance (Draft B)
- ICB Vision for the SES (2nd Edition) (Draft D)

A.2 MEETINGS

During 2018, the ICB held the following meetings:

Plenary meetings

- ICB/66 – 28th March 2018

Institutional Sub-group meetings

- ISG/71 – 15th February 2018

Technical Sub-group meetings

- TSG/50 – 13th February 2018
- TSG/51 – 12th June 2018
- TSG/52 – 5th October 2018

Workshops

- Evolution of the ICB Workshop – 15th February 2018
- ICB Vision I Workshop – 30th May – 1 June 2018
- ICB Vision II Workshop – 5th – 6th September 2018
- ICB Vision III Workshop – 22nd November 2018

ANNEX B:

ICB MEMBERS AND OBSERVERS FOR 2018

B.1 LEADERSHIP

- Mr Olaf Dlugi | Chairman and ISG Chair
- Ms Patricia Bier | Vice-Chairwoman
- Mr Steve Williams | TSG Chair
- Mr Michael Mowinski | TSG Vice-Chairman

B.2 MEMBERS

Airports (2 members)

Airports are represented by ACI.

The members are:

- Mr Luc Laveyne – ACI Europe
- Mr Panos Spiliotis – ACI Europe

Airspace Users (8 members)

Airspace users are represented by IATA (2), AIRE, ERAA, EBAA, IAOPA, A4E (2).

The members are:

- Mr Achim Baumann – A4E
- Ms Vanessa Ruillier-Francaud – EBAA
- Mr Russell Dudley – ERAA
- Ms Sylviane Lust – AIRE
- Mr Michael Erb – IAOPA
- Mr Rory Sergison – IATA

ANSPs (4 members)

ANSPs are represented by CANSO.

The members are:

- Ms Tanja Grobotek – Director European Affairs CANSO
- Ms Alison Macmaster – NATS/Chair of CANSO Europe Policy Task Force
- Mr Rüdiger Schwenk – Vice Chair of CANSO Europe Coordination Meeting
- Mr Danilo Pisciotto – Manager European Regulatory and Social Affairs CANSO

CNS Service Providers (2 members)

Communication Service Providers are represented by ARINC and SITA alternately:

- Mr Patrick Geurts – SITA
- Mr Bjorn Syren – ARINC

Manufacturing Industry (4 members)

Manufacturing industry is represented by ASD.

The members are:

- Mr Vincent de Vroey – ASD
- Mr Luc Lallouette – Thales/ASD
- Mr Stefano Porfiri – SELEX/ASD

Meteorological Service Providers (1 member)

Meteorological Service Providers are represented by the Aviation Meteorology Group

The member is:

- Mr Eric Petermann – EUMETNET/AVIMET

Professional staff associations (5 members)

Professional staff associations are represented by 5 members:

- Mr Jean-Denis Larrere – ATCEUC
- Mr Loïc Michel – ECA
- Mr Daniel Liebhart – ETF
- Mr Paul Neering – IFATCA
- Mr Robert Schneebeuer – IFATSEA

5.1 OBSERVERS

EASA (1 observer)

EASA is represented by:

- Mr Bryan Jolly – EASA

EUROCONTROL (2 observers)

EUROCONTROL holds two observer seats; one for a representative of the Agency, and one for a representative of the Network Manager (NM).

EUROCONTROL is represented by:

- Mr Philippe Merlo – EUROCONTROL (DATM)
- Mr Pascal Dias – EUROCONTROL (NM)

European Defence Agency (1 observer)

The observer is:

- Lt Col Denis Bouvier – EDA

Military (1 observer)

Military interests are represented by MilHaG.

The member is:

- Lt Col Gert Jan Van Kralingen – MilHaG

Non-European Interests (3 observers)

Non-European Interests are represented by the FAA, AIA and GAMA.

The members are:

- Mr Chris Benich – AIA
- Mr Jens Hennig – GAMA
- Ms Maria Di Pasquantonio – FAA

Research Establishments (1 observer)

The interests of research establishments are represented by EATRADA.

The member is:

- Nicolás Suárez – EATRADA

SESAR Deployment Manager (1 observer)

The SESAR Deployment Manager is represented by:

- Mr Freek De Witte – SDM

SESAR JU (1 observer)

The SESAR JU is represented by:

- Mr David Bowen – SESAR JU

Standardisation Bodies (1 observer)

The Standardisation bodies are represented by EASCG.

The member is:

- Mr Christian Schleifer – EASCG

ICB

Industry Consultation Body

