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19 – 20 May 2021

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Outlook for the airline industry

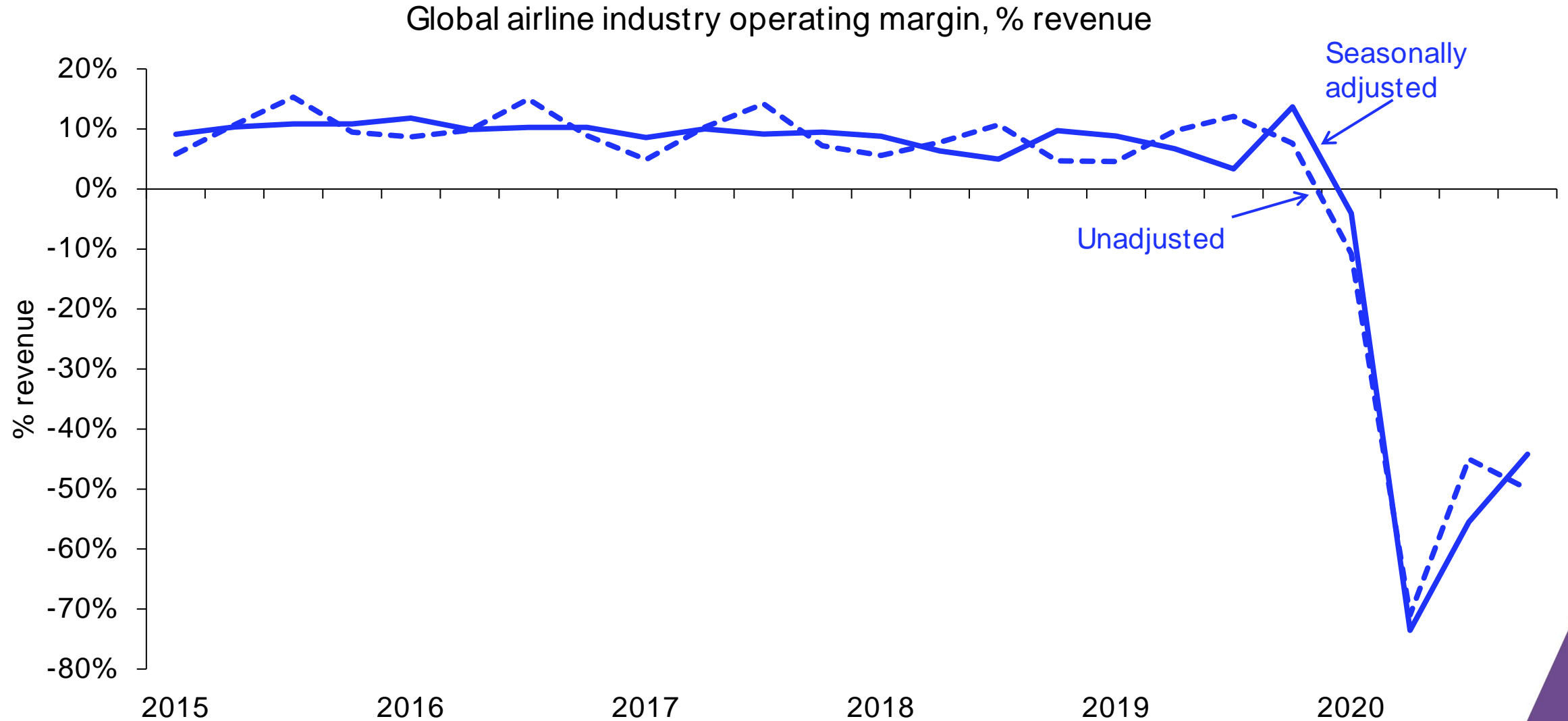


Mr. Conrad Clifford

Regional Vice President, Asia Pacific,
International Air Transport Association

Airline industry finances improving but still weak

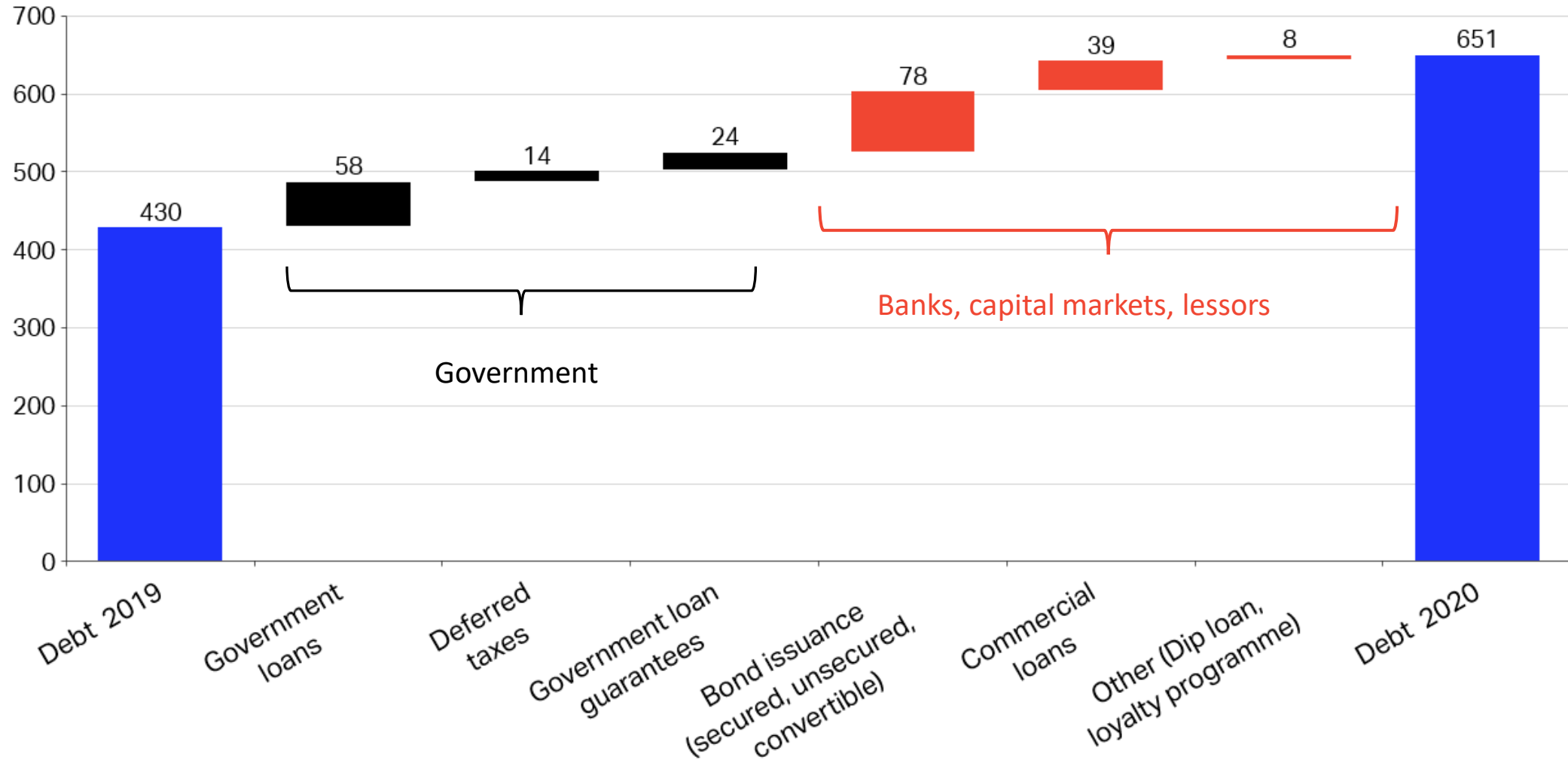
Operating losses reduced only to 50% of revenues by Q4 of 2020



Source: IATA Economics Airline Industry Financial Forecast update, April 2021

Survival cost - a huge rise in airlines' debt by end-2020

\$220bn rise in airline debt as a result of govt aid and market issues

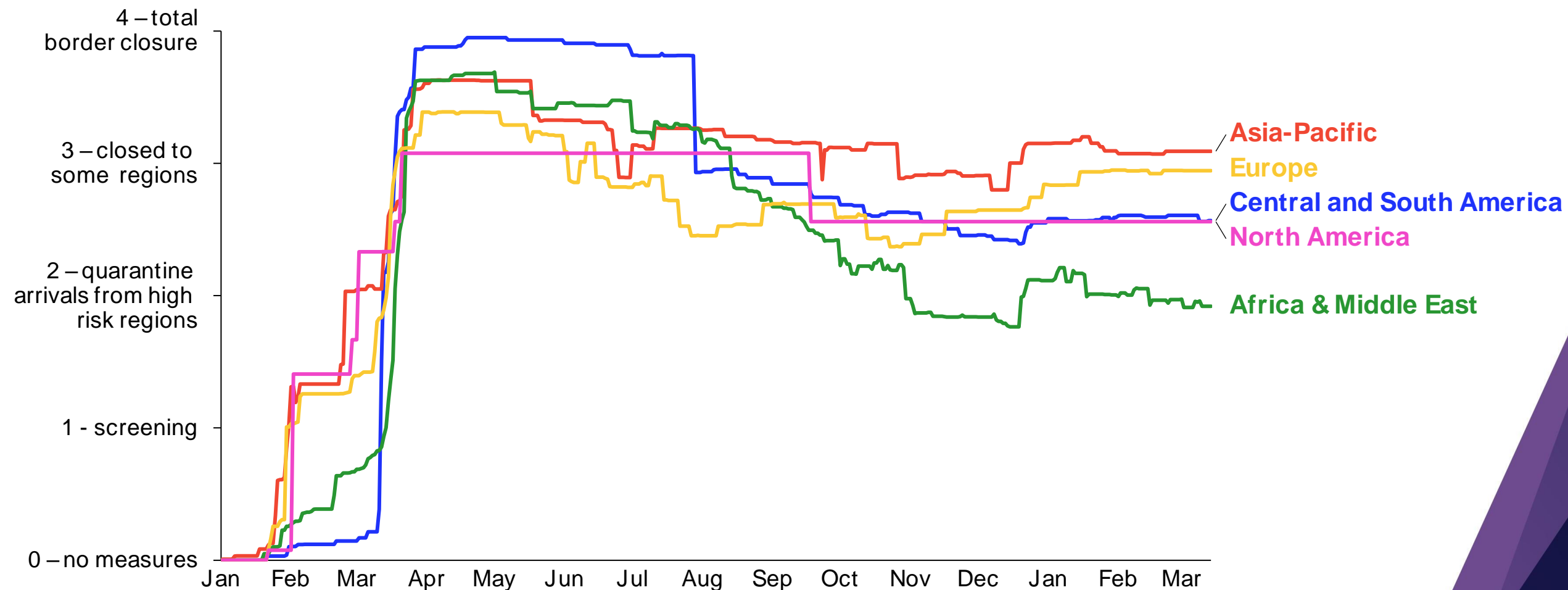


Source: Source: IATA Economics using data from own estimates of Government aid, private debt estimates from Airfinance Journal, November 2020. Debt includes adjustment for operating leases.

Travel weak until international restrictions are reduced

Most international air travel markets are at less than 15% of 2019 RPKs

International travel stringency index weighted by population (Jan 2020-March 2021)



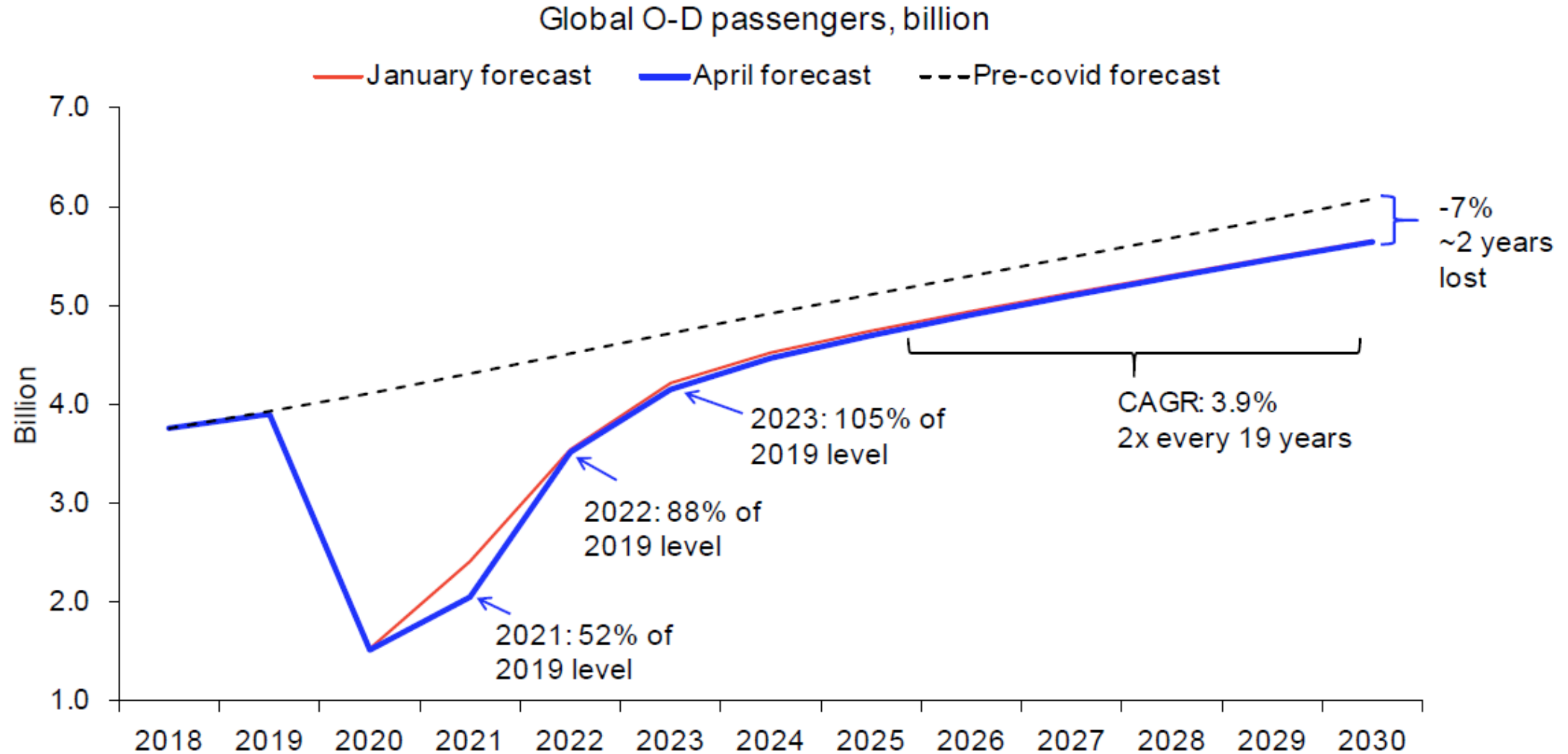
Source: IATA Economics analysis based on Oxford University data

Delays to vaccination and government risk aversion limits market opening



Slow start to global air travel recovery but strong 2022/3

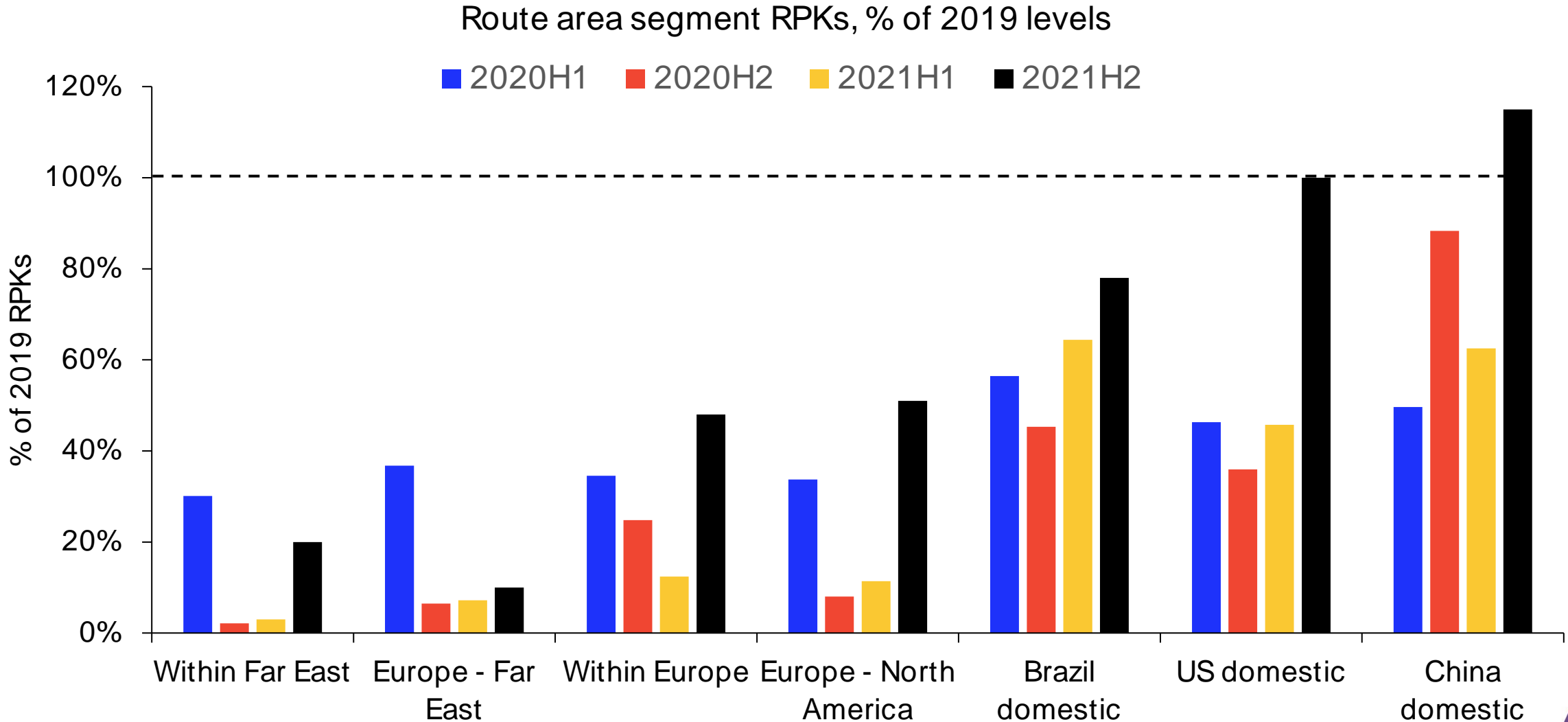
Global O D passenger numbers exceed 2019 levels by 2023



Source: Source: IATA Economics using data from Tourism Economic/IATA Air Passenger Forecast, April 2021.

Strong 2nd half in domestic markets, international weak

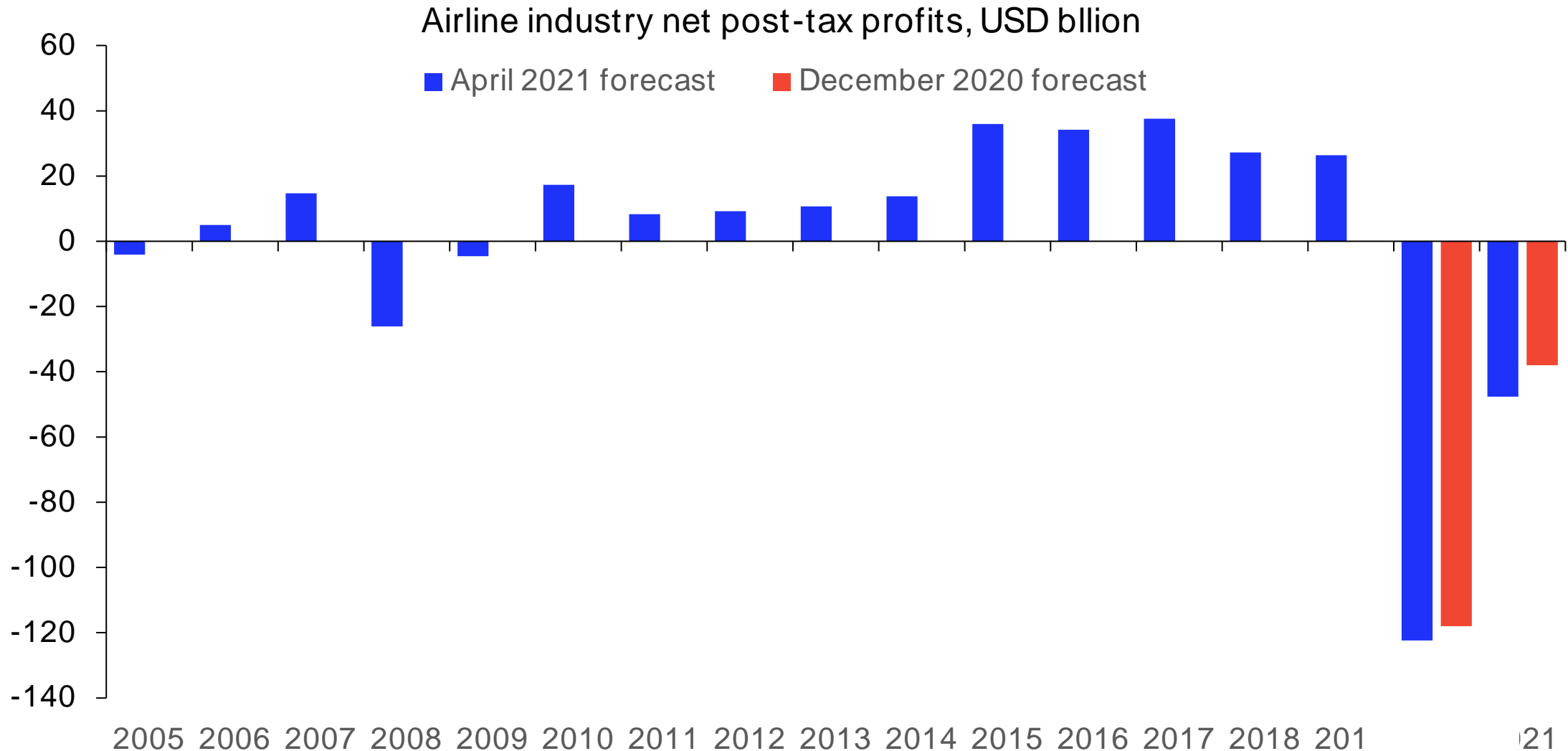
International RPK only 34% of 2019 by 2021H2, but domestic back to 96%



Source: IATA Economics Airline Industry Financial Forecast update, April 2021

Another year of losses in 2021 but down 2-3x on last year

With a slower revenue recovery, return to profit delayed until 2022



Source: IATA Economics Airline Industry Financial Forecast update, April 2021

**What does this all
mean for airlines
and ANSPs?**



The Global Air Transport Industry

87.7 million

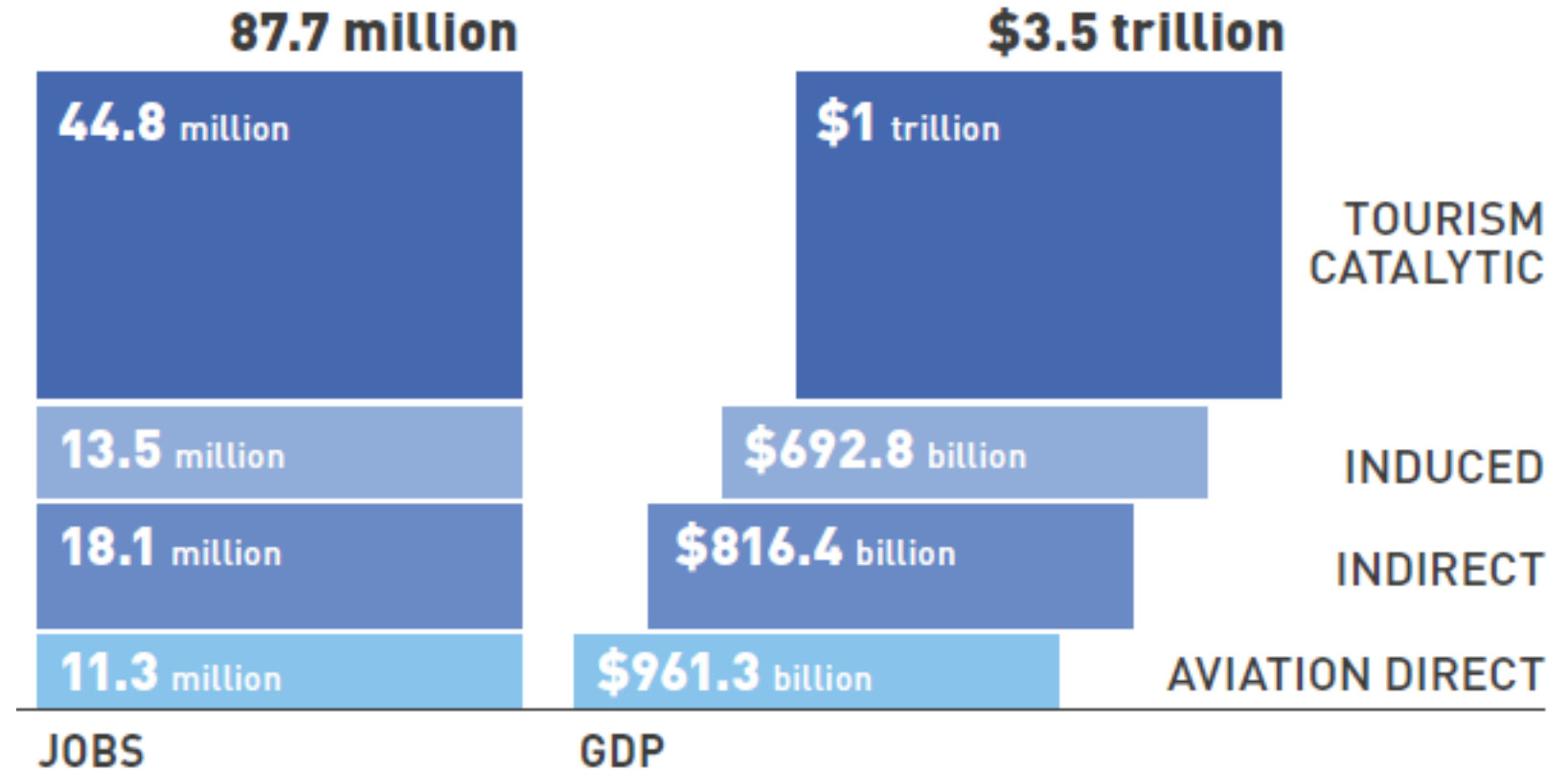
Jobs supported by aviation worldwide

\$3.5 trillion

Aviation's global economic impact
(including direct, indirect, induced and tourism catalytic)

4.1%

Global GDP supported by aviation



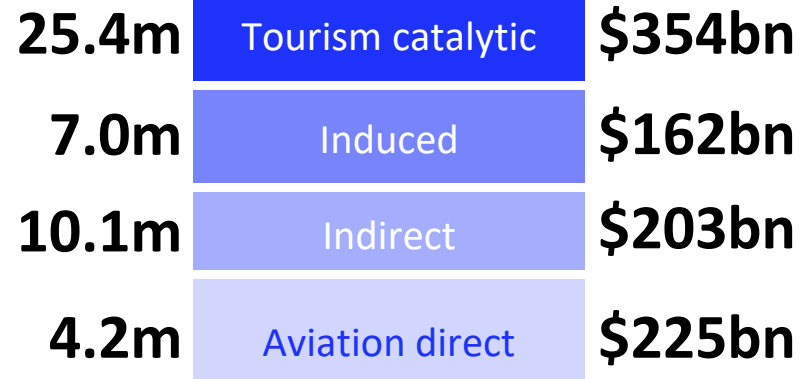
Source: Aviation Benefits Beyond Borders 2020

Asia Pacific:

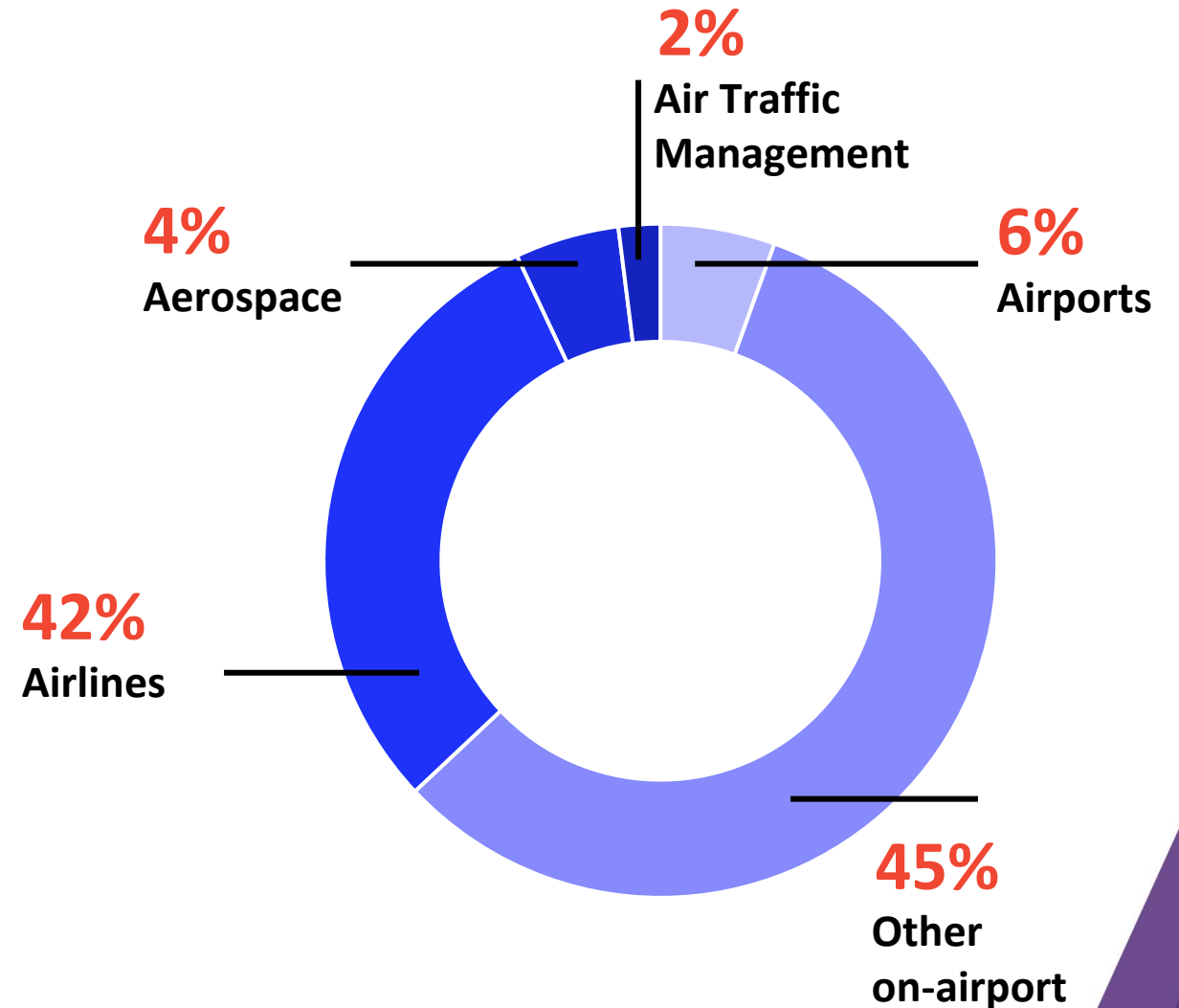
total jobs and GDP supported by air transport

Jobs total
46.7m

GDP total
\$944bn



direct jobs generated by air transport



Source: Aviation Benefits Beyond Borders 2020



**We must contain costs whilst
collaboratively planning for the future**



**Some positives
to end on**



Thank you

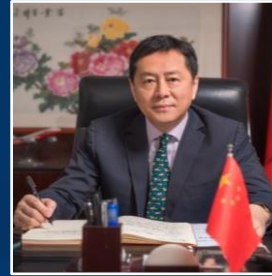


The new normal in ATM



Mr. Jason Harfield

Chief Executive Officer,
Airservices Australia



Mr. Zhang Yong

Deputy Director General,
ATMB CAAC



Ms. Teri Bristol

Chief Operating Officer, FAA



Mr. Pramintohadi Sukarno

President Director, AirNav
Indonesia

The new normal in ATM



Mr. Jason Harfield

Chief Executive Officer,
Airservices Australia

Airservices response to 'the new normal'



RESPOND

Addressed the immediate challenges that COVID-19 presented to Airservices customers and partners

REPOSITION

Reposition the organisation so that it is able to react and respond quickly to a return to the new normal and manage the knock-on effects associated with the current situation

RE-IMAGINE

Re-imagine how we work and transform our services through digitalisation and automation to respond to the evolving needs of customers, both existing and emerging

在危机中育新机 于变局中开新局

ATM Challenge and Development under the New Norm of COVID-19 Pandemic

疫情新常态下空中交通管理的挑战与发展

Wednesday 19 and Thursday 20 May 2021

The new normal in ATM



Mr. Zhang Yong
Deputy Director General

**Air Traffic Management Bureau,
Civil Aviation Administration of China**

目录 CONTENTS

01

抗击疫情成功经验
Lessons learned
through the fight
against COVID-19

02

**新常态下的机遇
和挑战**
Opportunities and
challenges under the
New Normal



中国民用航空局空中交通管理局
Air Traffic Management Bureau, CAAC

The impact of COVID-19



- Enormous impact on global aviation
- In China, the Total Turnover of passenger and cargo has dropped by 38% year on year in 2020
- The best out of the worst: no incident caused by major error in 2020, and no single ATCO has contracted the coronavirus so far.



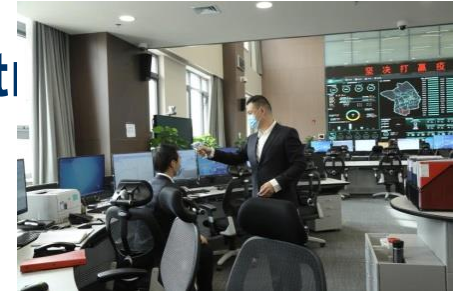
Lessons Learned



Actions must be guided by scientific theory



Build robust prevention and control systems under a central and united leadership



Uphold the belief that operational safety must be placed above all else



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Opportunities and Challenges



Steady recovery of the Chinese aviation



1.941 million flights in Q1 2021, up by 37.48%



Boost air logistics and general aviation development

Higher pressure on the ATM system

Greater test to airspace resources,
technological innovation, competence of personnel
and infrastructure construction

Expectations for the next 5 years



Passengers over 900m; flights 15m



Uncertainty in international aviation market

Ready for long-term inadequacy in revenues

Strive to identify risks, meet challenges head on,
and address issues in a scientific way

Prime Time for Improvements



Regulatory Framework

01



Airspace Optimization

02



New Aviation Technology

03



Financial Resilience

04



Sincere Gratitude from ATMB

No winter can stop the spring from coming, darkness can't prevail over light.

青山一道同云雨，明月何曾是两乡。

“Like the mountains under the same pieces of cloud,
we share the same moon even worlds apart.”



Thank you



The new normal in ATM



**Mr. Pramintohadi
Sukarno**

President Director, AirNav Indonesia

NEW NORMAL IN AIRNAV INDONESIA

NAVIGATING COVID-19 IMPACT

PRAMINTOHADI SUKARNO
President Director

Tangerang, 19 May 2021



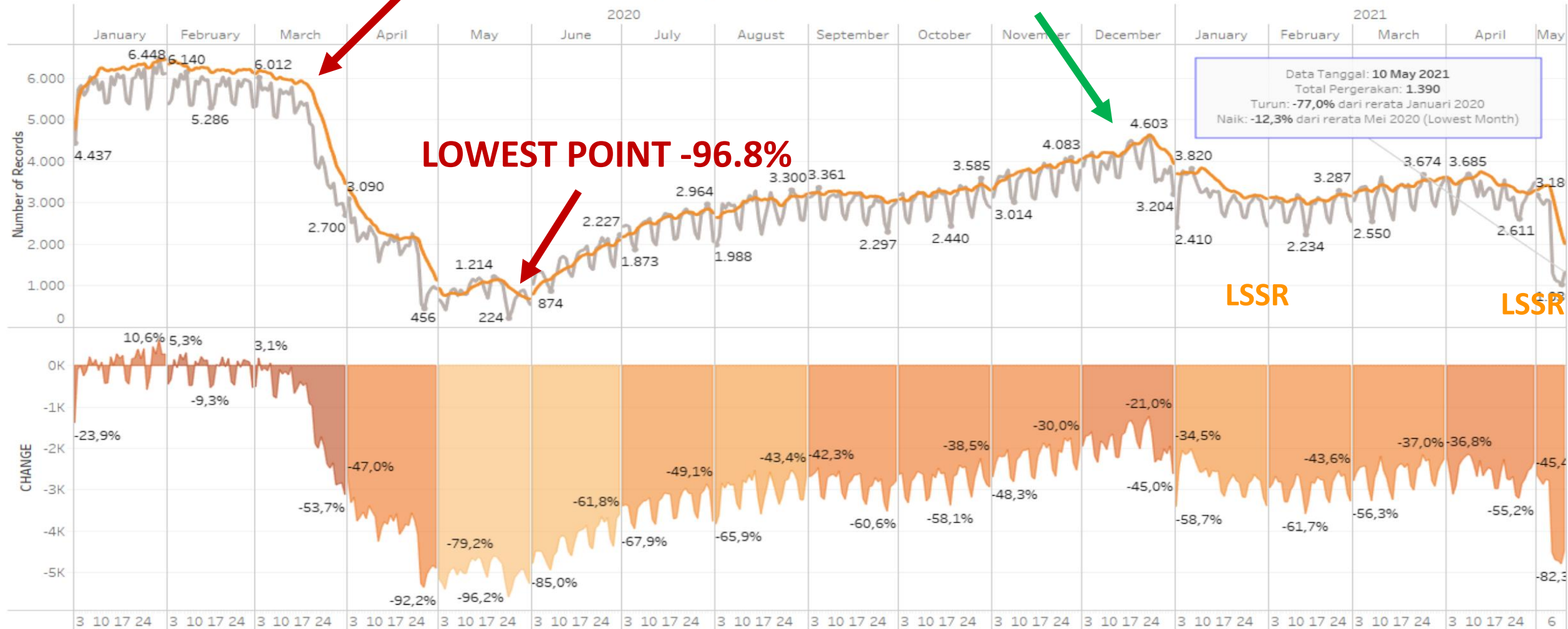
AirNav Indonesia



INDONESIA DOMESTIC TRAFFIC TREND

COVID-19 IMPACT

RECOVER?



AIRNAV CORPORATE STRATEGY



Put into operation **AirNav Business Continuity Plan (BCP)** to ensure continuation of navigation services provision in Indonesia airspace



Revised Year 2020 Budget and Programs by streamlining resources and cost and also **revisit our Long Term Plan**;



Breeding **innovation and breakthrough** to adapt pandemic situation to improve services for customers efficiency;



Boosting **utilisation of information technology** to achieve Corporate Key Performance Indicator (KPIs) set by the Ministry of State Own Enterprise



AIRNAV BUSINESS CONTINUITY PLAN (BCP)

OPERATIONAL PROTOCOL

PERSONNEL CARE

WORKPLACE PROTECTION



CORPORATE POLICY

- ☐ Establish COVID-19 TASK FORCE
- ☐ Published COVID-19 Protocol
- ☐ *Employee Handbook* of COVID-19
- ☐ Work From Home Protocol
- ☐ Service Continuity Guidance (SCG)
- ☐ Optimise network & *WFH application*



OPERATIONAL PROTOCOL



Service Continuity Guidance as reference to manage personnel availability, sector management and traffic built up;



Fixed grouping system for operation personnel;



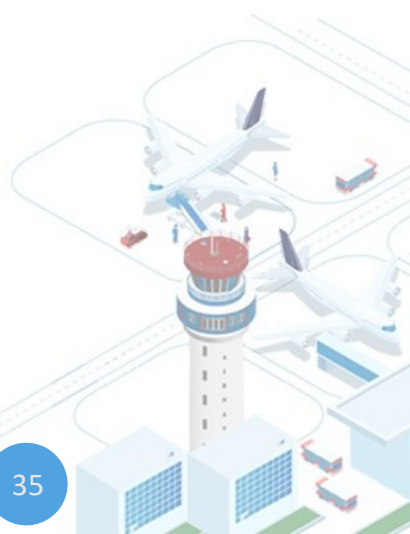
COVID-19 Screening Protocol COVID-19 refer to Indonesia Aviation Health Department No.SE.008/HATPEN/III/2020;



COVID-19 contingency handling protocol (in-duty);



Transfer of duty protocol



WORKPLACE PROTECTION



Routine disinfect for workplace and workdesk



Hand-sanitizer placement in strategic corner



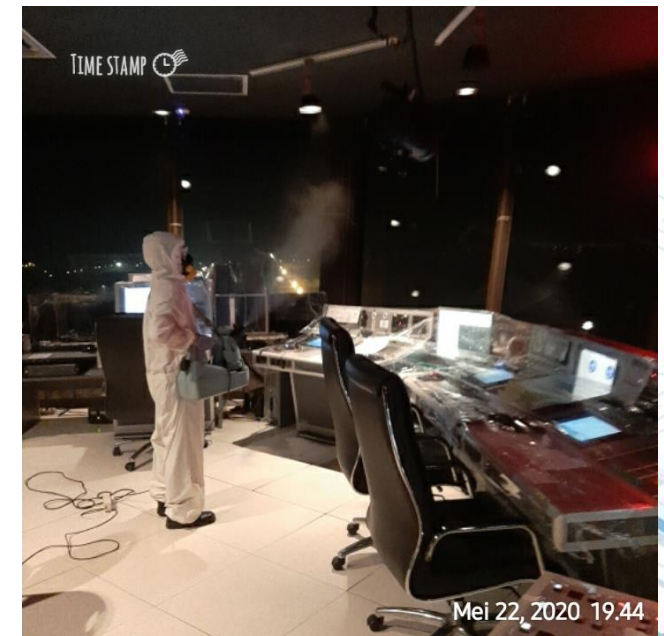
Physical distancing in workplace and guest restriction



Backup/standby room for contingency



entry dan exit separation



PERSONNEL CARE



Mask is mandatory



Use personal working tools and utilities



Less/non-touch procedures for entry and clocking/login



Social distancing: in opsroom, breakroom, briefing room and all areas;



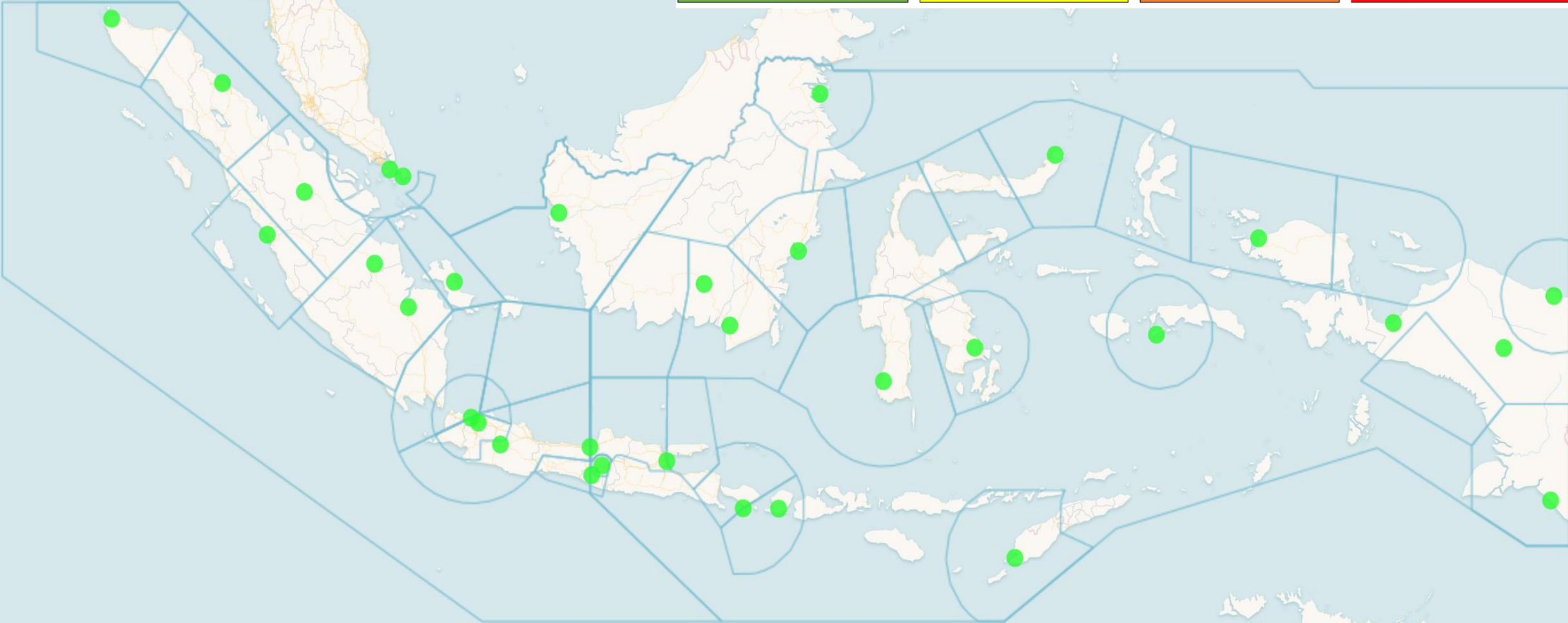
If feeling unwell, report to supervisor/chief



SERVICE CONTINUITY GUIDANCE STATUS

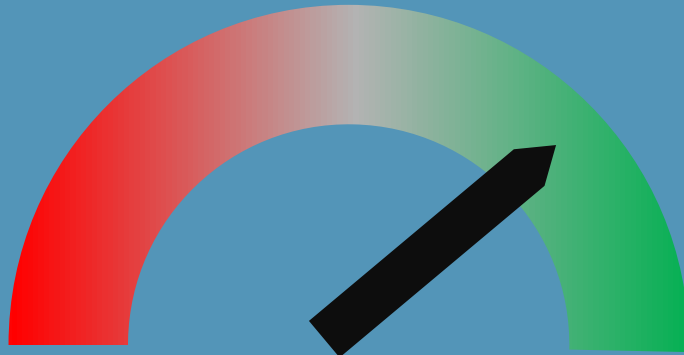
Routine report from each unit at 0700 UTC

GREEN		YELLOW		ORANGE		RED*	
PERSONNEL AVAILABLE	75-100%	PERSONNEL AVAILABLE	50-75%	PERSONNEL AVAILABLE	25-50%	PERSONNEL AVAILABLE	<25%
TRAFFIC VOLUME	100%	TRAFFIC VOLUME	60-100%	TRAFFIC VOLUME	30-60%	TRAFFIC VOLUME	0-30%
SEKTOR	FULL OPEN	SEKTOR	OPTIMISE	SEKTOR	MINIMIZE	SEKTOR	MINIMUM/CLOSE
OPERATION HOURS	AIP	OPERATION HOURS	OPTIMISE	OPERATION HOURS	MINIMIZE	OPERATION HOURS	MINIMUM/CLOSE
NOTAM	NO	NOTAM	YES	NOTAM	YES	NOTAM	YES
SET CREW	STANDARD	SET CREW	FLEXIBLE	SET CREW	MINIMIZE	SET CREW	MINIMUM/CLOSE
ROSTERING	GROUPING	ROSTERING	GROUPING	ROSTERING	GROUPING	ROSTERING	GROUPING
NORMAL OPERATION SECTOR MANAGEMENT		COMBINED SECTOR SLOT LIMITATION DELAY/CANCELLATION HR ANNUAL LEAVES		COMBINED/CLOSED SECTOR SLOT LIMITATION DELAY/CANCELLATION TRAINING MOBILISATION MANAGERIAL-RATED TIBA PROCEDURE (PARTIALLY)		COMBINED/CLOSED SECTOR SLOT LIMITATION/SLOT RESTRICTION TIBA PROCEDURE (FULL) LIMITED OPERATION (PEAK HOURS) LIMITED OPERATION (EMERGENCY) DETASEER TO MAIN BRANCHES CLOSE OPERATION**	

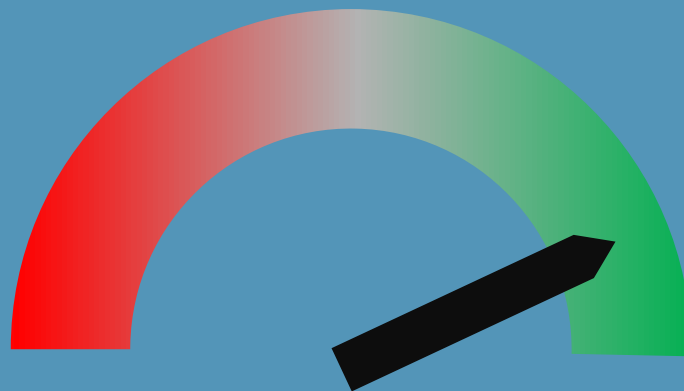


2020 BUDGET & PROGRAMS

PLAN

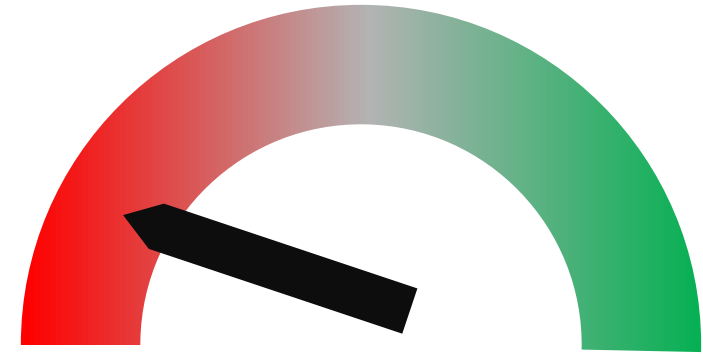


REVENUE

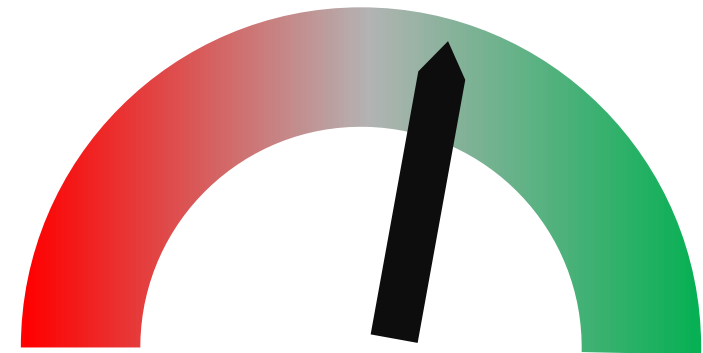


CAPITAL PROGRAM

ACTUAL



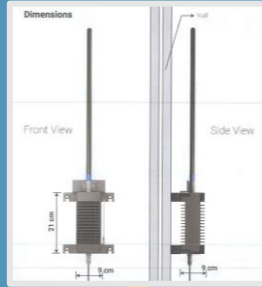
REVENUE



CAPITAL PROGRAM

INNOVATION & BREAKTHROUGH

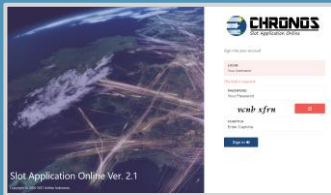
ORYX
IoT ADS-B Receiver



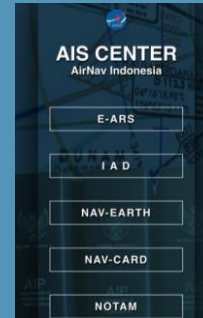
**UPR (USER
PREFERRED ROUTE)**
implementation



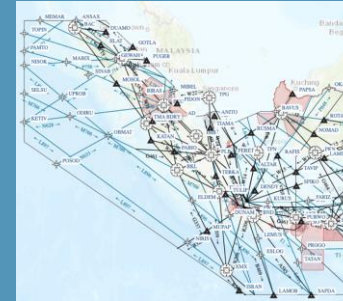
CHRONOS
Managing Airport
Dynamic Capacity



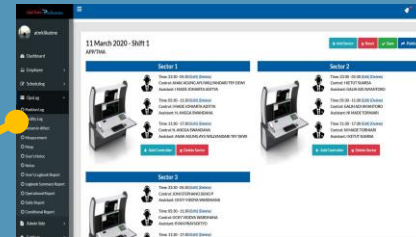
INAVCARD
5LNC Checkers



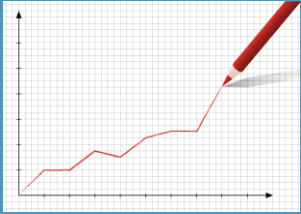
NAVEARTH
GIS (Geographic
Information
System) Chart



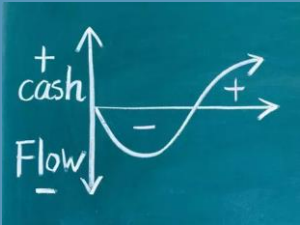
RELEASE
Rostrering Apps



CHALLENGES AHEAD



Take times for traffic to **recover** to 2018/2019 level



Even if traffic rebounds, customers still experiencing financial turbulence which create **cashflow problem**



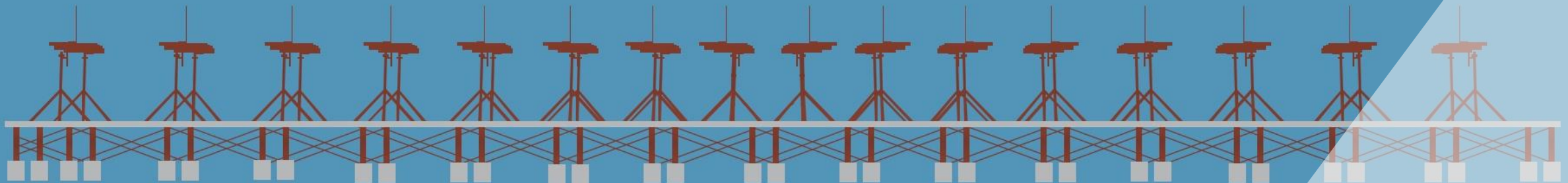
Boards commit to **Minimum impact for employee**



Minor government subsidies in 2020/2021 and no further plan for major one



THANK YOU



PERUM LPPNPI

(Perusahaan Umum Lembaga Penyelenggara Pelayanan Navigasi Penerbangan Indonesia)

Kantor Pusat Gedung AirNav Indonesia

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