Informal South Pacific ATS (Air Traffic Services) Coordinating Group

Airservices Australia Update

Brisbane, Australia

5-7 May 2026

Overview of who we are

Australia's Civil Aviation Framework

Policy

Australian Government

Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts

The Hon Catherine King MP
Minister for Infrastructure, Transport, Regional Development and Local Government

Investigator

Australian Government

Australian Transport Safety Bureau

Service Provider

airservices australia

Regulator

Australian Government

Civil Aviation Safety Authority

Airservices Australia

We provide safe, secure, efficient, and environmentally-responsible air navigation and aviation rescue fire fighting services to the aviation industry.

11%
GLOBAL AIRSPACE MANAGED

3.9M
AIRCRAFT MOVEMENTS IN FY2025

+160M
PASSENGER MOVEMENTS IN FY2025

3761
STAFF ACROSS AUSTRALIA

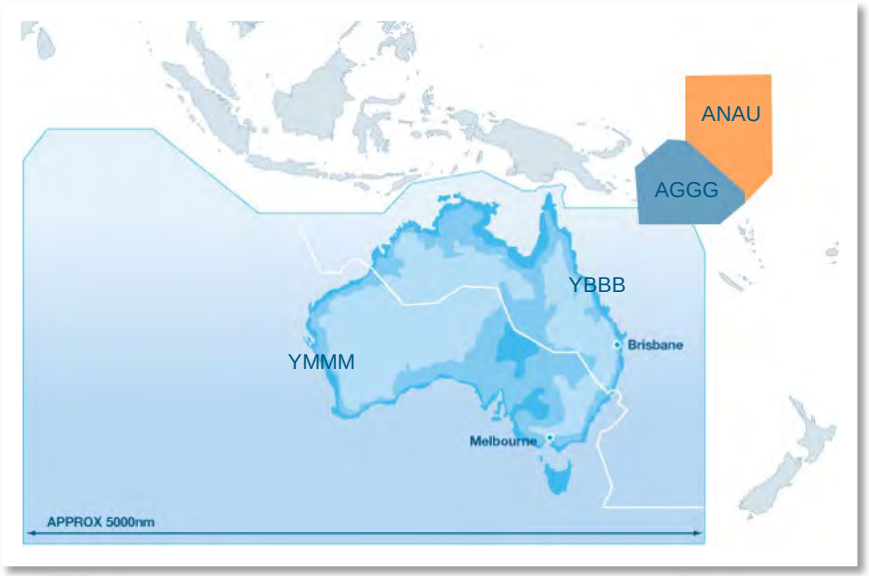
29
AIR TRAFFIC CONTROL TOWERS

4
AIR TRAFFIC SERVICES CENTRES

27
AVIATION RESCUE FIREFIGHTING SERVICE STATIONS

24/7
365 DAYS A YEAR

Who are we and what do we do?



KEEPING OUR SKIES SAFE

Supporting Aviation

- World-class services
- Safely managed 3.9 million movements in 2025
- We manage 11% of the world's airspace, including the upper airspace for Nauru and the Solomon Islands.

SAVING LIVES

Australia's Aviation Rescue Fire Fighting Service

- We provide aviation rescue fire fighting services at 27 of Australia's busiest airports
- Have a fleet of 98 fire fighting vehicles and 19 vessels
- We are always on stand-by to rescue people and property from an aircraft crash or fire and other fires and emergencies at airports.

Connecting people with their world safely

Cooperation

Our purpose

Customers

Key purposes

Provide facilities and services for the **safety, regularity and efficiency** of air navigation within Australian-administered airspace.

Carry out activities to **protect the environment** from the effects of, and associated with, aircraft operations.

Promote and foster **civil aviation** in Australia and overseas.

Our strategy

Key activities

- Air traffic management (ATM)
- Aviation rescue fire fighting (ARFF)
- Fostering new markets
- Noise abatement
- Community engagement
- Aircraft emissions
- Increasing airspace accessibility

Priorities

Within 2 years (2025–2027)

- Return towards profitability
- Upgrade infrastructure and expand services
- Transform organisational culture

Within 5 years (2025–2030)

- Improve service efficiency and effectiveness through digitalisation
- Build a future-ready workforce

Our enablers

Capital investments

- ARFF NexGen facilities and environment
- Service level upgrade
- OneSKY
- Enterprise Network Modernisation Program
- Uncrewed services
- Western Sydney International

Capabilities

- Reporting and governance
- Risk oversight and management
- Financial management and plan
- Service and enabling technology
- People capability
- Environmental, social & governance (ESG)

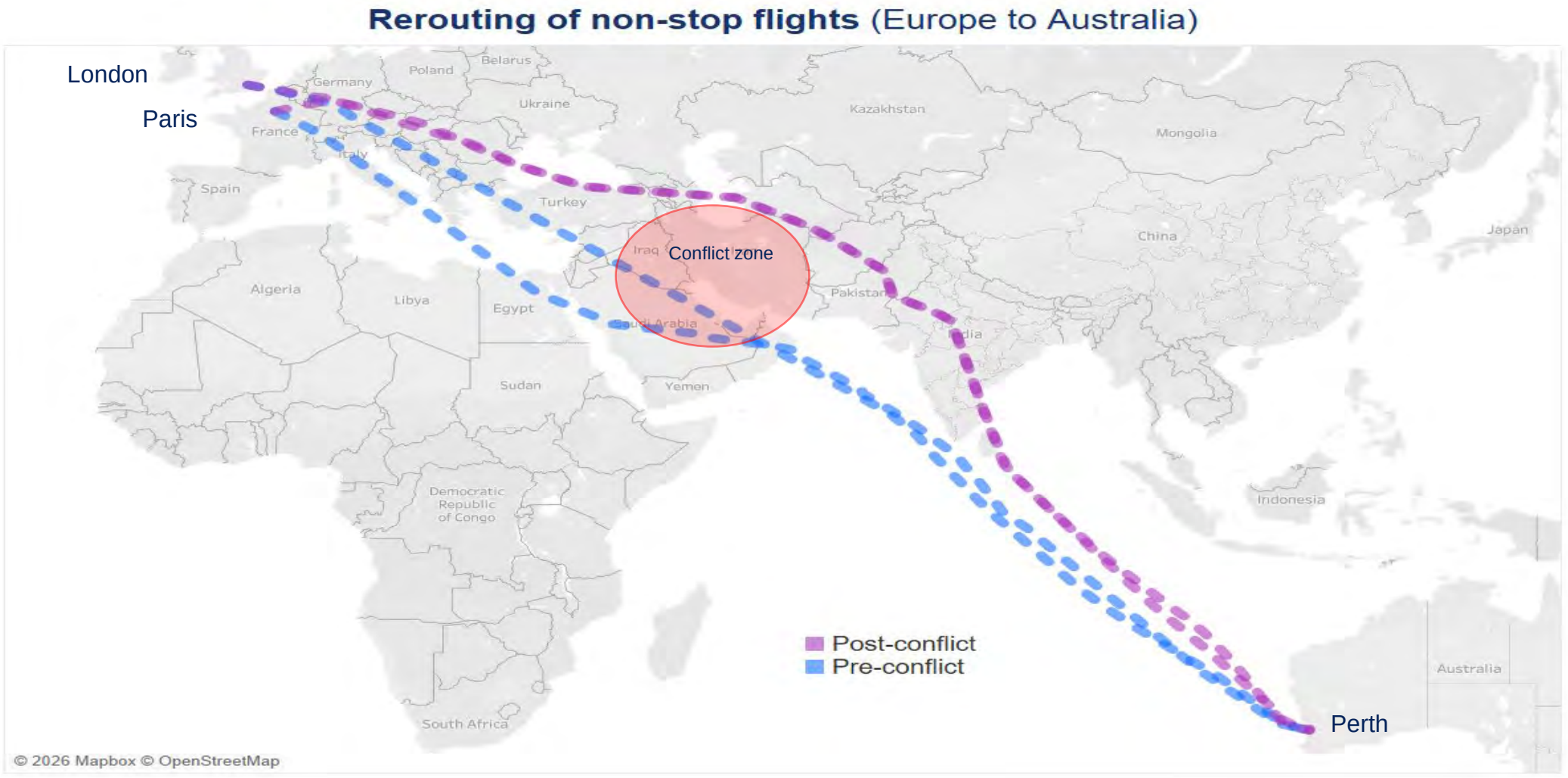
Performance

- Community impact
- Environmental protection
- Culture and health of our people
- Air navigation safety
- Financial sustainability
- Service efficiency

Operating Environment

- Public expectations for predictable and reliable services
- Market volatility
- Increased airspace complexity
- Increasing need for industry collaboration and integration
- Emerging technology opportunities
- Decarbonisation benefits assisting in minimising environmental impacts

Social factors: aircraft emissions

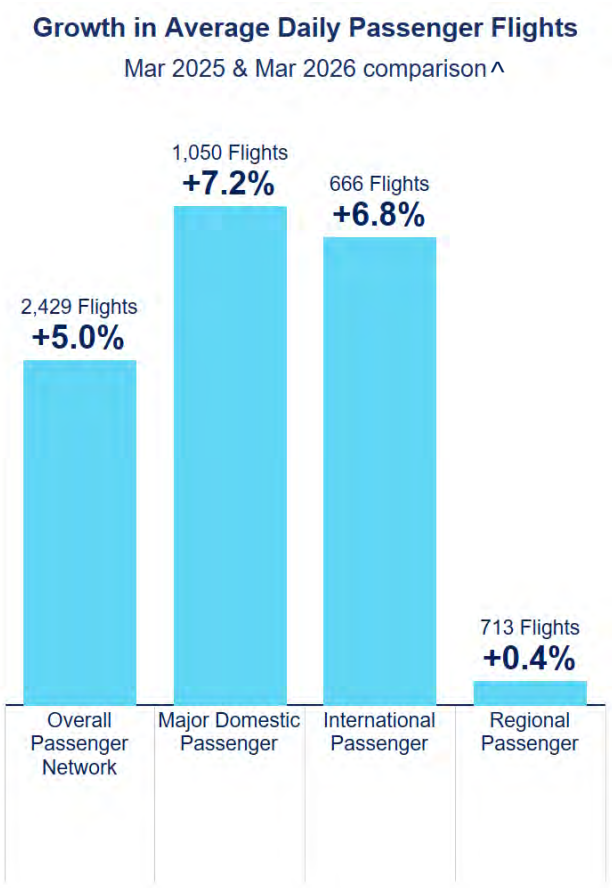


Source: Eligible flights include all jet operations over oceanic and cross-continental airspace. Eligibility is independent of technology, training, or other operational constraints. CO_2 emissions savings are measured across the entire flight segment within Australian airspace.

State of Australian aviation growth

The Australian aviation network recorded 2,429 daily average passenger flights in March, broadly in line with the rolling 12-month average. While around 6% of the network associated with Middle East carriers have been impacted, this has been largely offset by continued growth in domestic passenger flights and international travel across Asia Pacific.

Figure 10. Average daily passenger flights in March 2026 with year-on-year change (left) and monthly year-on-year traffic growth trend by market segments (right).



Source: Airservices ODAS (excludes helicopters).
^ March 2025 traffic was impacted by ex-tropical cyclone Alfred.
** General Aviation: Flight Training* data is one month in arrears.

Top aircraft operators

Most Middle East carriers' flights to/from Australia have been suspended. In contrast, the activities among the major operators driving the network have been relatively stable, reflecting resilient travel demand and a cautious and disciplined industry approach to the evolving operating environment. This also underscores the value of cross-sector coordination in sustaining network resilience and collectively mitigating the impacts of external shocks.

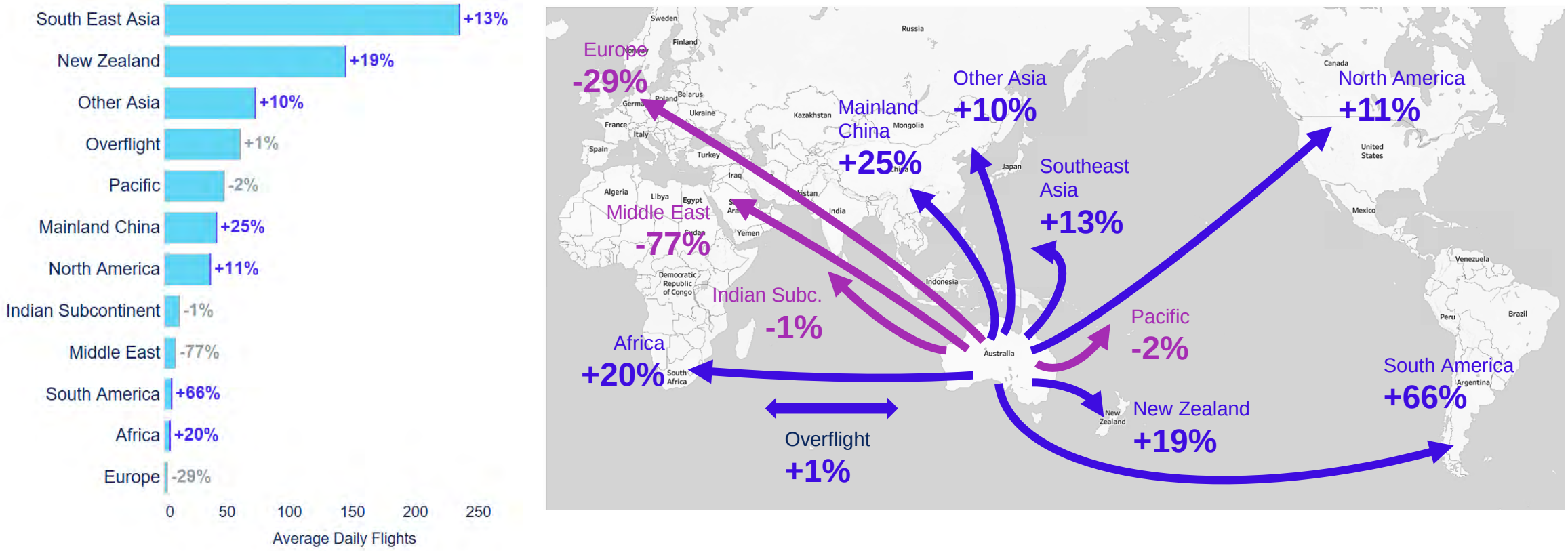
Figure 11. Growth of top airlines for the domestic segment (left) and international segment (middle, right) in March 2026, with year-on-year percentage change*.

Source: Airservices ODAS (includes airline flights only). Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.
* The first week in March 2025 was severely impacted by ex-Cyclone Alfred, and therefore year-on-year comparisons between March 2025 and March 2026 are not fully representative of underlying or broader growth trends.

International markets

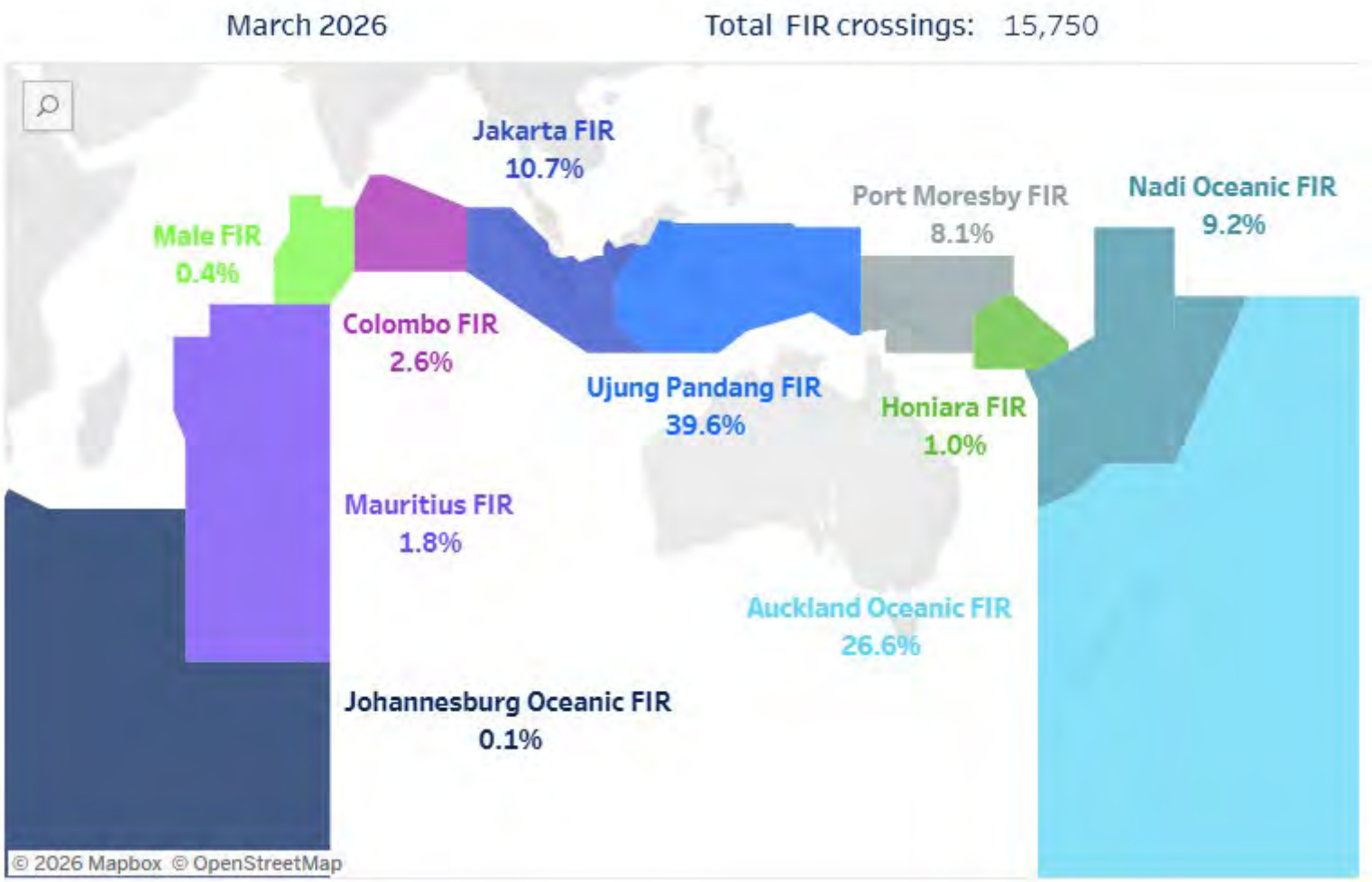
Australia-Middle East traffic is down 77% year-on-year and direct Australia-Europe traffic has fallen by 31% as some services are re-routed via other hubs. In contrast, Asian gateways such as Singapore, Kuala Lumpur, Hong Kong, Tokyo, and Seoul are capturing much of this displaced demand and may emerge as alternative hubs and travel destinations. Growth in international markets is mixed, with media reporting that some Chinese airlines are reducing flights to Australia to focus on higher yield routes while outbound demand to Southeast Asia remains resilient.

Figure 13. Growth of international markets by region for March 2026 with year-on-year change.



Source: Airservices ODAS (includes airline flights only).
Overflights are those transiting the airspace without landing. For multi-leg flights, legs that start and end outside Australian airspace are not included.

Airservices International Traffic – March 2026



International Engagement

Airservices International Engagement

- International Engagement Approach with Strategic Focus Areas:
  - ✓ Elevating regional aviation safety performance
  - ✓ Promoting global interoperability
  - ✓ Partnering and collaborating with organisations to develop innovative technologies, products and services
- Extensive Global and Regional engagement through influence in targeted technical/operational Panels and Working Groups of International Civil Aviation Organisation (ICAO)
- Increasing participation in Civil Air Navigation Services Organisation (CANSO) forums and events
- Participation in Government funded (Department of Foreign Affairs and Trade) targeted capacity building programs in the region:
  - ➢ Indonesia
  - ➢ Papua New Guinea
  - ➢ Pacific
- Establishing strong bilateral links across the Asia-Pacific region and with like minded industry providers
- Trusted and known partner and advisor

ATC Operational

User Preferred Route Updates

Pacific

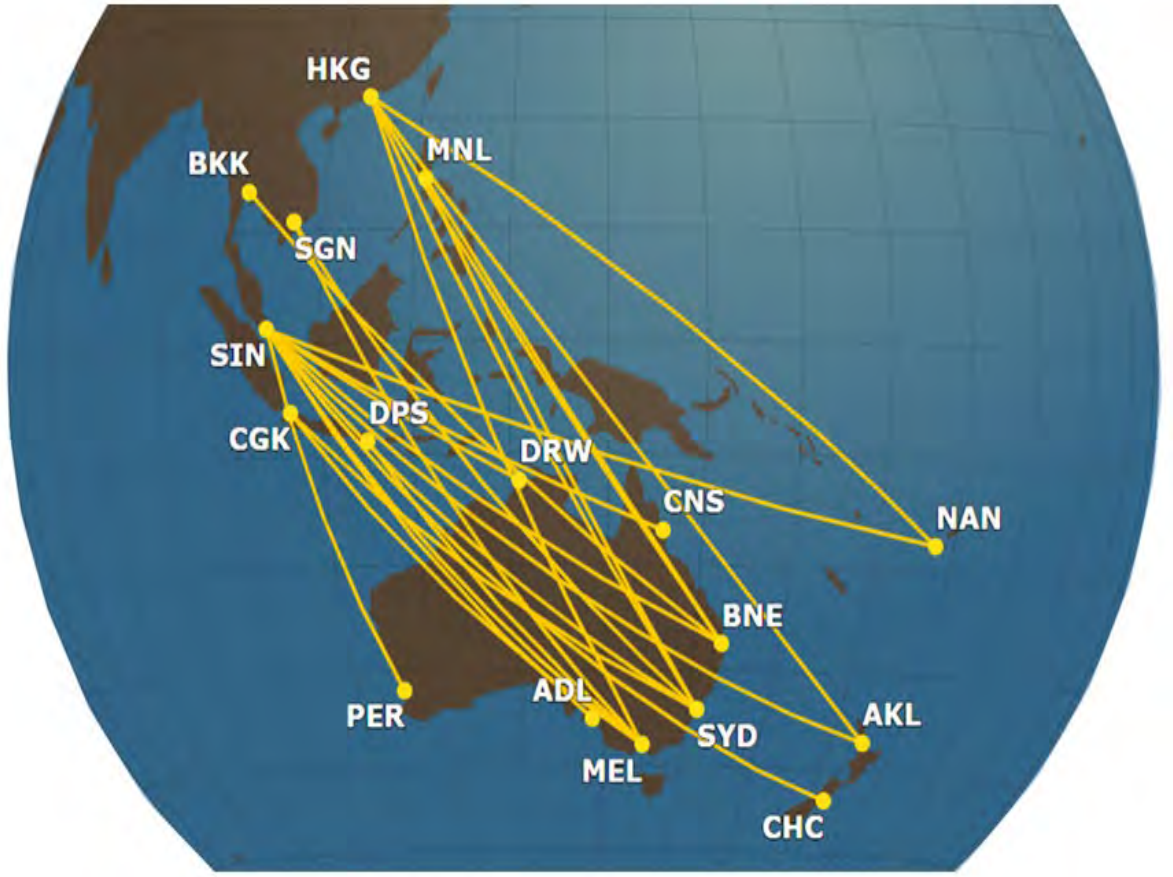
- Cross-boundary UPRs have existed in the Pacific for some time. For Airservices, this has involved implementation and coordination with NiuSKy Pacific, Airways New Zealand, Fiji Airports and the FAA
- New direct route segments continue to be added through the UPR exclusion zones surrounding busy east coast ports, linking the oceanic and continental UPR areas. The UPR exclusion zones are only active during periods of peak activity, allowing uninterrupted UPR's outside of activation hours.
- Updated equipment requirements to enable non datalink equipped aircraft to utilise UPR's.
- Airlines are now required to not flight plan via a point that is a common boundary between three or more FIR's. This is a minor restriction that has large benefits for controller workload and safety performance. Some specific system limitations made this a challenging scenario for controllers.

Asia

- ICAO Asia-Pacific Air Navigation Services Provider Committee established in 2023 with 4 workstreams
- Oceanic Workstream tasked with enabling regional cross boundary flexible routing options
- Connecting strong bilateral operational relationships in a multi-lateral environment

Asia-Pacific User Preferred Route Trial

- ICAO Asia-Pacific ANSP Committee (AAC) initiative
- Partnership with ANSPs from Singapore, Indonesia, New Zealand, Fiji, Papua New Guinea and Australia
- From 1 July 2025, trials were expanded from 38 to 70 flights per day across national carriers from the participating ANSPs, with the addition of two new ANSPs – Fiji Airports and NiuSky Pacific (PNG)
- Removed the requirement for flight planning published waypoints at FIR boundaries
- Delivered strong fuel and emission savings and represents what can be achieved in total when multiple States work in cooperation.
- The trial city-pair flights are only a small component of total UPRs that can be accessed in the participating States



General Airline Feedback

- Early days: it took airlines a period while to get started. Some faced system setup challenges and change management issues, but once they began, participation and tracking became more consistent.
- Participation: Average rates are relatively low to medium, but as noted above, it took some time to get going, and some sectors rarely showed gains. In these cases, it wasn't worth participating as there was no gain.
- Fuel savings: The flights to/from Indonesia had the least opportunity to benefit, and even some SIN services didn't show significant benefit, whereas the overflying traffic could take full advantage. There were some significant savings for HKG city-pair (averages of around 2000kg).
- Administration: Airlines request that the manual processes (e.g., email and commentary on the FPL) be removed as these have an impact on participation. The reality is that a busy dispatch centre will choose the path of least resistance in times of high workload rather than go through these manual steps.
- Next steps: Airlines support making this trial BAU. Jetstar was proposed as a new participant as they have Thailand and Vietnam destinations that can achieve significant benefits.

Next Steps

- Safely and efficiently expanding the set of flights (new carriers and new new city pairs) permitted to participate in partnership with ATC operations
- ATM Modernisation in Indonesia presents an opportunity to expand along the Jakarta-Melbourne boundary
- Japan and Philippines also expressed interest in joining this initiative

Thank you